CHAPTER 2: II. CATALOGING ARCHIVAL/MANUSCRIPT COLLECTIONS

CATALOG DATA FIELDS INDEX

Archival/Manuscript Data Fields

❖   Mandatory Field

\#   Must complete either Item Count or Quantity

@   The program enters 'Not Provided' if you do not complete this field

II. CATALOGING ARCHIVAL/MANUSCRIPT COLLECTIONS

A. Overview

1. *What types of materials do I catalog as archival/manuscript collections?*

Catalog the following types of documentary materials as archival/manuscript collections:

- personal papers (such as a family's letters and photographs)

- organizational records (such as corporate records)

- assembled manuscript collections (such as an assembled collection of Civil War maps and correspondence)

- resource management records (such as field notes and reports)

Refer to the DOI *Museum Property Handbook*, Volume II (*MPH-II*), Appendix C: Historical and/or Scientific Document Collections, or the NPS *Museum Handbook*, Part II (*MH-II)*, Appendix D: Museum Archives and Manuscript Collections, for additional descriptions of these types of materials.

2. *Where can I find information on cataloging?*

Refer to the *Museum Handbook*, Part II (*MH-II*), Chapter 3, Cataloging, or the *Museum Property Handbook*, Volume II (*MPH-II*), Chapter 3, Cataloging, for general information on cataloging objects. Refer to the *MPH-II,* Appendix C: Historical and/or Scientific Document Collections or the *MH-II,* Appendix D: Museum Archives and Manuscript Collections for specific information on cataloging archival/manuscript collections. Refer to your site-specific cataloging procedures, if available.

3. *How many screens does an archival/manuscript collection record have?*

The basic catalog record consists of five screens:

- registration (for basic collections accountability data)

- catalog (for descriptive data)

- provenience/manufacture (prov/manf) (for data on the source of the collection)

- archival/manuscript collection (archives) (discipline-specific screen for descriptive data)

- unit (for unit-specific data that the user defines)

In addition, there are numerous supplemental record screens that can relate to the catalog record. Refer to Chapter 3, Supplemental Records.

4. *How will I know which data are mandatory?*

The instructions in this manual and the on-line help will indicate which fields are mandatory. If you do not enter data in a mandatory field, the program will do one of the following:

- not allow you to save the catalog record, *or*

- enter "Not Provided" in the field

5. *What if I have unverified data?*	It is important to distinguish between unverified data and documented fact. Use a question mark "?" or "(att)" for attributed, to indicate data that are probable but not certain.
6. *Do I have to complete every field?*	Not every archival/manuscript collection will be sufficiently documented to allow completion of all fields. If information is not known, leave the field blank.
7. *How do I add to or change information on an existing catalog record?*	To modify a record:

- click on the modify icon ![icon] on the button bar, *or*

- go to Edit on the menu bar and choose Modify This Record from the pull-down menu, *or*

- press the F10 key

A new window will open and you will see "Modify Mode" in the lower-right corner. You can then modify and save the record.

B. Adding an Archival/Manuscript Collection Record

1. *How do I get to my cultural resources records?*	To access your cultural resources records:
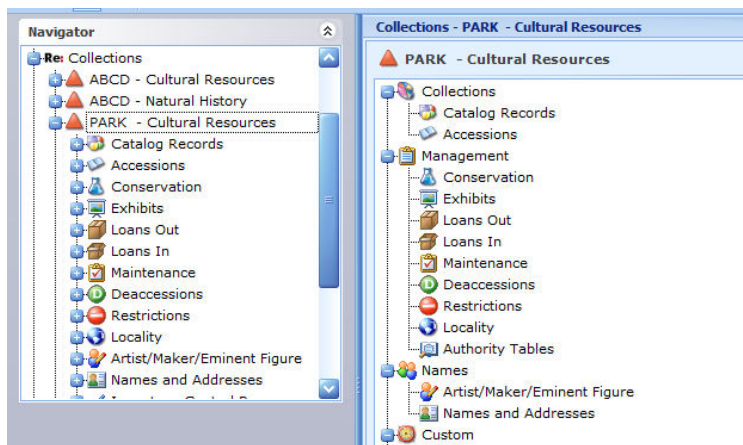
- From the Home Page or Navigator, double-click on Collections, or expand the tree view for Collections by clicking the ![icon] icon in front of it (if it is already expanded you will see the ![icon] icon).

- At the Collection Directory Page (or under Collections in the tree view), double-click on the Cultural Resources directory for your unit.

- At the Cultural Resources screen, double-click on Catalog Records.

You should see the first record in your cultural resources database.

2. *How do I get to my archival/manuscript collection records?*	To view all your archival/manuscript collection records together:

- click on the Advanced Word Search icon (binoculars) on the button bar

- at the Word Search screen, press F11 to see a list of fields, and double click on K=Class 4, 'K=' will be inserted in the search box. Close the list of fields by clicking the X.

- enter Archival, and click on <u>Begin Search</u> or press Ctrl-S

- after the program finishes searching, you will see the number of records found and the list of records on the search results page

To view a record, double click the entry on the list. The record will open in a separate window. To use the list of records as a Tag Set, click <u>Use Search Results</u> or press Ctrl-U. The list of records will appear in the List Pane.

Class 1	Catalog #	Object, Object(NOM)
HISTORY	PARK 462	BILL BROWN HISTORIC MAPS FILE
HISTORY	PARK 802	PRINT, PHOTOGRAPHIC
HISTORY	PARK 9510	MANUSCRIPT, REPORT
HISTORY	PARK 9511	MANUSCRIPT, RESEARCH PAPER
HISTORY	PARK 9512	MANUSCRIPT, BOOK
HISTORY	PARK 9513	MANUSCRIPT, STUDENT PAPER
HISTORY	PARK 9514	MANUSCRIPT, PAPER

Collections - PARK - Cultural Resources - Catalog Records. Drag a column header here to group by that column.

To view a record, click on the row in the List Pane and that record will appear in the Record Pane below.

(Refer to Chapter 7: Finding and Grouping Records for further information on the use of Tag Sets.)

3. *How do I add an archival/manuscript collection record?*

To add a new record:

- click on the add icon ⊞ on the button bar, *or*

- go to Edit on the menu bar and choose Add New Record from the pull-down menu, *or*

- press the F9 key

A new window opens. "Add Mode" is indicated in the lower right of the status bar. You can then add and save a record.

4. *How do I move through the record?*

Within the Field
Press the Home key to get to the beginning of a field or the beginning of a line of text in a memo field. Press the End key to get to the end of the text in a field or the end of a line of text in a memo field.

Field to Field
Press the Tab key to go from field to field. Shift-Tab will take you back one field. You can also move the mouse pointer to the field and single-click.

Page to Page
To move from page to page within a record:

- click on the page tabs at the top of the record, *or*

- press Ctrl-R (previous page) or Ctrl-N (next page), *or*

- press the Left and Right arrow keys (if the page tabs are already selected), *or*

- go to View on the menu bar and choose Previous Page or Next Page

5. *How do I access the supplemental records?*

To access supplemental records :

- click on the Supplemental Information tab on the catalog record, *or*

- press Ctrl-R or Ctrl-N until the page you want

6. *How do I cancel a record?*

To cancel the record without saving the data:

- click on <u>Cancel</u> on the lower right corner of the screen

- click on the Cancel icon ✖ on the button bar, *or*

- go to File on the menu bar and select ✖ <u>C</u>ancel

7. *How do I save a record?*

To save a record:

- click <u>Save and Close</u> on the lower right corner of the screen, *or*

- click the Save and Close icon 🖫 on the button bar, *or*

- go to File on the menu bar and select 🖫 Save and Close

Note: You can also use the Save option instead of Save and Close. Save leaves the record window open in View mode after saving while Save and Close closes the record window after saving.

If you have not entered data in all the mandatory fields, the program will prompt you to enter the data. The message will list all required fields that have not been completed. The program then asks if you want to save the record as a draft.
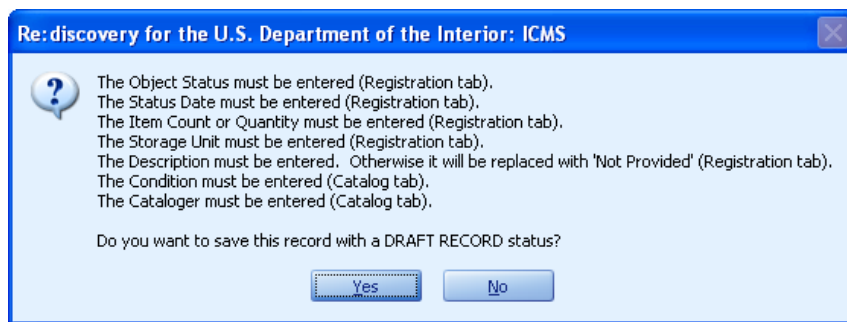
If you choose...	*Then the program...*
Yes,	prompts you for tracking information for location, condition, and catalog notes (see Section D). You can choose not to update the supplemental information for these or enter the information. The program then enters "Draft Record" in the Object Status field and saves the record.

Note: The program won't allow you to save a draft record if you have a duplicate catalog number.

No,   returns you to the screen to complete the mandatory field(s). Note: The mandatory fields will be marked with 🗙 to indicate which fields are required.

> *Remember to update the Object Status field for all draft records. A draft record is not an official record. The CMR doesn't count draft records. For NPS, the National Catalog doesn't count or print draft records.*

8. *What are the Images and Multimedia tabs at the top of the catalog record?*

You can attach and display many images of the object on the Images tab. The Multimedia tab allows you to attach other media files such as video and sound clips, documents, spreadsheets, pdf files, etc. Refer to Appendix G in this manual for information on Imaging and Multimedia.

9. *What is the Associations tab?*

You can create and view Associations (groupings) between different Catalog Records, including those in different directories and modules within ICMS. This is useful if you have items in different directories that are related by subject matter. For example, if you have catalog records in a Cultural Resources directory and a Natural History directory for items collected by the same person and archival documentation about that collection, you can create an association between them.

You can create associations between the follow types of records in ICMS:

- Collections Module: Catalog Records

- Archives Module: Collection Level Records, Series Level Records, File Unit Level Records, and Item Level Records

Refer to Chapter 6, Section IX, Associated Records.

10. *Why does the same Description field appear on most of the tabs?*

The program displays a few lines of the Description field at the top of each of the catalog record's pages, with the exception of the discipline-specific page. You can enter data into any of the screens where the Description field appears and you will see the data you entered on all the screens that have the Description field.

11. *What are the catalog number and date in the upper right corner?*

The catalog number identifies the record. It appears as soon as you enter the number in the Catalog # field. The log date appears when you save the record. It indicates the date the record was entered into the computer.

12. *Can I access the Art and Architecture Thesaurus (AAT) when I'm cataloging?*

Yes. You can access the AAT from any memo field by right-clicking and choosing Browse Lexicon. Refer to Appendix E: Lexicons for additional information on using the AAT with **ICMS**.

C. Field-by-Field Instructions

1. *How do I complete the data fields on the registration screen?*

Follow the field-by-field instructions for completing the fields on the registration screen. The instructions for each field are on the left side of the screen as you add or modify a record. Remember to press the Tab key to move out of a field.

Note: If you do not see the field help on the screen, go to View on the menu bar, go to Navigation Pane Options, and select Field Help.

Note: Fields marked with a ❖ in this manual are mandatory fields. You must complete these fields.

> *Remember to enter an accession record for the catalog record before you begin to catalog. Refer to Section I of Chapter 4 for information on entering accession records. You can also access the accession record from the catalog record as you enter the catalog data.*
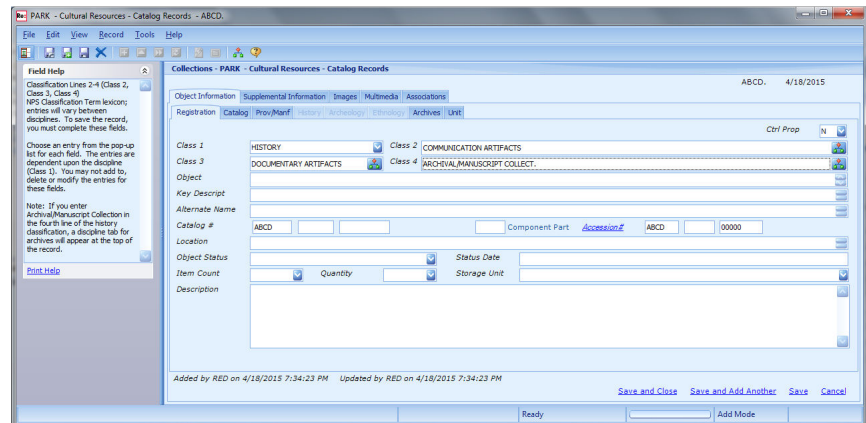
❖ *Controlled Property (Ctrl Prop)*

Logical Y/N field. **To save the record, you must complete this field.**

Type "Y" or "N." You can click on the arrow to see a pull-down menu of Y or N. Highlight the entry you want and single-click or press the Enter key.

Select "Y" (Yes) for controlled property. You must designate the following types of material as controlled property:

- archival/manuscript collections with a value of $1,000 or more

- incoming loans of archival/manuscript collections (with the exception of incoming loans to repositories)

- archival/manuscript collections especially vulnerable to theft, loss, or damage

Select "N" (No) for non-controlled property.

❖ *Classification Line 1 (Class 1)*

Bureau controlled table (F5). **To save the record, you must complete this field.** You may not add to, delete, or modify terms in this table.

Classify all archival/manuscript collections, including field notes, as history.

Enter: HISTORY

Type "H" and the program will autofill the entry. Or you can press the F5 key or click the down arrow icon to view and select 'HISTORY' from the table.

Note: The History discipline tab will become active at the top of the record after you tab to the next field. The Archives tab will become active after you complete Classification Line 4.

❖ *Classification Lines 2-3*
(Class 2, Class 3)

Nomenclature 3.0 for Museum Cataloging: Third Edition of Robert G. Chenhall's System for Classifying Man-Made Objects (Nomenclature 3.0) lexicon. **To save the record, you must complete these fields.** You may not add to, delete, or modify the entries for these fields.

For Classification Line 2, choose Communication Artifacts from the list of *Nomenclature 3.0* entries by typing the entry, or pressing F5 or clicking the lexicon icon next to the field and selecting the term from the lexicon. This is the only acceptable entry for this field.

For Classification Line 3, choose Documentary Artifacts from the list of *Nomenclature 3.0* entries by typing the entry, or pressing F5 or clicking the lexicon icon next to the field and selecting the term from the lexicon. This is the only acceptable entry for this field.

❖ *Classification Line 4*
(Class 4)

Bureau controlled table (F5). **To save the record, you must complete this field.** Users may not add to, delete or modify terms in this table.

Enter: ARCHIVAL/MANUSCRIPT COLLECT.

As you type, the term will complete from the lexicon. You can press F5 or click the lexicon icon next to the field to select the term from the lexicon. This is the only entry in the lexicon for an archival record.

When you tab out of Class 4, the Archives discipline tab will become active instead of History.

❖ *Object*

Memo field (F12 to expand). **To save the record, you must complete this field.** The data in this field will transfer to the Collection Title field in the collection level record of the Archives Module.

Enter the collection title, which is the name by which the archival/manuscript material is known. It consists of the creator's name, followed by the physical form of the collection.

Name element: Give the full name of the creator or collector of the archival materials, whether an organization, individual, family, or group. Use direct order, first name followed by the last name. Do not invert the name. Do not include articles such as "the" or "a" at the beginning of the name.

Form of material: Record a term that characterizes the form of material in the collection. For collections containing a single form of material, use a material designation, such as letters or photographs. For collections containing multiple forms of materials, use:

- "Papers" for personal papers of individuals or families

- "Records" for the archives of organizations, corporate bodies, or groups

- "Collection" for a group of materials that was formed artificially around a person or subject

Example: Warren Sears Nickerson Papers
                Theodore Roosevelt Family Photograph Collection
                Harmony Hall Field Records

York Corporation Records
Collection of Washington Allston Materials

Key Descriptor
(Key Descript)

Memo field (F12 to expand).

Do not use this field for archival/manuscript collections.

Alternate Name
(Alt. Name)

Memo field (F12 to expand).

Do not use this field for archival/manuscript collections.

❖ **Catalog Number**
(Catalog #)

For NPS, this is a 3-part 12-character field (sortable by acronym and number). For DOI, this is a regular, unedited 60-character field. **To save the record, you must complete this field.** The catalog number will transfer to the Catalog Number field in the collection level record of the Archives Module.

If possible, assign only one catalog number to the entire collection. The catalog number links the catalog record to an optional corresponding collection level record in the Archives Module.

NPS Note: You may assign individual catalog numbers to materials within an archival/manuscript collection, such as items placed on exhibit or items with particular aesthetic, monetary, historical, associated, or other value. For each catalog number you must complete a catalog record in the collection management module. Refer to the *MH-II*, Appendix D, Section N, for additional information on cataloging materials individually.

NPS Catalog Number format:

Catalog #	PARK		

a. The first part is the four-letter park acronym, in the form of "AAAA." (**Note:** The acronym will autofill from the record you were viewing when you began to Add a new record.)

b. The second part is a collection designation. The term "collection" refers to a museum collection, not an archival/manuscript collection.

If the park has different units that have separate accession and catalog systems, enter a collection designation in the form of a letter, for example, A, B, C. Only a few parks will use this designation.

The Chief Curator must approve the designation. Review requests to use a designation with the Regional Curator. Send requests in writing to the Chief Curator, WASO.

c. The third part is the unique sequential number assigned to a collection, for example, 9999999.

Example: SHEN   190
COLOJ   3456 [The Colonial NHP number contains a J as a designation for the Jamestown collection.]

DOI Catalog Number format:

Catalog #	

Enter a catalog number using a standard format. The first part of the catalog number should be your unit acronym.

Example: BLM 1999.09.03

Note: The program will not allow you to enter a catalog number of "0" or a duplicate catalog number. After you enter the catalog number, it appears above the record in the upper right corner of each screen.

Component Part

4-character field in the form of "a-aa" that links to the Component Parts supplemental record.

Do not use this field for archival/manuscript collections.

❖*Accession Number (Accession #)*

For NPS, this is a 3-part 10-character field.
For DOI, this is a regular, unedited, 60-character field. **To save the record, you must complete this field.** The accession number will transfer to the Accession Number field in the collection level record of the Archives Module.

Enter the earliest accession number for the collection. There is a field for additional accession numbers on the discipline-specific screen.

NPS Accession Number format:

Accession #	PARK	-	00000

a.   The first part is the four-letter park acronym, in the form of "AAAA." (**Note:** The acronym will autofill from the record you were viewing when you began to Add a new record.)

b.   The second part is a hyphen, which distinguishes the accession number from the catalog number. (**Note:** The hyphen will autofill from the record you were viewing.)

If the park has different units with separate accession and catalog systems, enter a collection designation in the form of a letter, for example, A, B, C, in place of the hyphen. Only a few parks will use a collection designation.

The Chief Curator must approve the designation. Review requests to use a designation with the Regional Curator. Send requests in writing to the Chief Curator, WASO.

c.   The third part is the 5-digit identification number assigned to an accession, for example, 99999. The program automatically pads the number with zeroes.

Example: YOSE-00001
          JELAB00072 [The Jean Lafitte NHP accession number contains a B as a designation for the Barataria collection.]

DOI Accession Number format:

Accession #	

Enter the number for the accession using a standard format. The first part of the catalog number should be your unit acronym.

Example: BLM 1999.09

Note: The accession number links the catalog record to the Accession Records associated module. Refer to Section I of Chapter 4 for information on the Accession Records associated module. The accession record contains the Acquisition Type and Acquisition Date fields that appear on the Museum Catalog Record (NPS Form 10-254 or DOI CR Museum Catalog Record). To go to the accession record, click on the <u>Accession</u> link on the screen. You can view, add, or modify the accession record for the object you are cataloging. Click on <u>Save and Close</u> to return to the catalog record screen. You cannot view, add, or modify the other accession records in the module from this link.

❖*Location*

Memo field (F12 to expand). History tracking field that links to the Location supplemental record. **To save the record, you must complete this field.** The data in this field will transfer to the Location field in the collection level record of the Archives Module.

Enter the physical storage location of the collection, starting with the most general location. For example, enter the building number or name, room number, cabinet number, and the shelf number.

Pad location numbers with zeroes if you want to sort by location. For example, use DR04 rather than DR4.

Develop standardized terms and abbreviations for storage areas and use these consistently. Enter locations from general to specific. Separate entries with a space.

A list of recommended abbreviations:

HS	Historic Structure
BLDG	Building
RM	Room
CAB	Cabinet
FCAB	File Cabinet
FCDR	File Cabinet Drawer
MC	Map Case
C	Case
SEC	Section
SH	Shelf
R	Rack
BX	Box
DR	Drawer
U	Unit

Example: HS 1 RM 101 SH 5
               BLDG 18 RM 1 U 13

For archival/manuscript collections stored outside the unit, enter the name of the institution where the materials are located, such as WACC or University of Texas.

Note: If a collection is located at another institution, you can also enter a tracking number used by that institution.

Example: MWAC-254

The program allows you to track changes in location. If you modify a location, the program will include the Location supplemental in the Track Changes window when you save the record (see Section D below). A history of location changes appears in the Location supplemental record.

Refer to Section XII of Chapter 3 for information on the Location supplemental record.

❖ *Object Status*

Bureau controlled table (F5). History tracking field that links to the Object Status supplemental record. **To save the record, you must complete this field.** You may not add to, delete, or modify the NPS entries for this field.

Enter the current status of the object. Choose from the following options:

Deacc - Conveyance (Donation)
Deacc - Destructive Analysis
Deacc - Exchange
Deacc - Involuntary Destruction
Deacc - Loss
Deacc - NAGPRA Compliance
Deacc - Return to Rightful Owner
Deacc - Theft
Deacc - Transfer DOI
Deacc - Transfer NPS
Deacc - Transfer Other Federal Agency
Deacc - Voluntary Destruction/Abandonment
Draft Record
Exhibit
Exhibit - Incoming Loan
Incorporated into Larger Archival Collection
Loan Out - Non-NPS (or Loan Out - Non-Bureau - Federal)
Loan Out - Non-NPS - Non-Federal (or Loan Out - Non-Bureau - Non-Federal)
Loan Out - NPS (or Loan Out - Bureau)
Loan Returned
Missing
Record Inactive
Removed - Non-Museum property
Storage
Storage - Incoming Loan
Storage - Non-Bureau (not used for NPS)

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

The program tracks changes in status but doesn't prompt you to enter a reason when you modify a status. A history of status changes appears in the Object Status supplemental record. You can go into the supplemental record and add a reason for status changes, if needed.

Refer to Section XIV of Chapter 3 for information on the Object Status supplemental record.

Remember to update the Object Status field. The program pulls data for the CMR from this field and the Status Date field.

❖ *Status Date*   4-character numeric field. **To save the record, you must complete this field.** Enter the 4-digit fiscal year for which the status applies.

Example: 1990
           2001

Note: The fiscal year runs from October 1 - September 30. The program uses the fiscal year to pull Object Status and Status Date data for the CMR.

❖ *Item Count*   Straight entry numeric field. **To save the record, you must complete either the Item Count or the Quantity field.** The item count will transfer to the Count subfield of the Extent formatted memo field in the collection level record of the Archives Module.

You must enter either an item count or a quantity (see the following field). There is a calculator linked to the field to help you calculate an accurate count or quantity. Click on the down arrow icon to use the calculator. (Press F4 to close the calculator.)

For small collections, enter the number of items, if known. Count a multiple-page document, such as a letter or manuscript as one item. Do not count the pages.

Example: 1 three page letter = 1

If an item count is necessary, use the conversion factor of 1600 sheets per 1 linear foot.

When you enter an item count, the program automatically enters "EA" in the Storage Unit field. If you do not have an item count, leave the field blank.

❖ *Quantity*   Straight entry numeric field with two decimal places. **To save the record, you must complete either the Item Count or the Quantity field.** The data in the Quantity field will transfer to the Extent subfield of the Extent formatted memo field in the collection level record of the Archives Module.

You must enter either an item count or a quantity (see the previous field). There is a calculator linked to the field to help you calculate an accurate count or quantity. Click on the down arrow icon to use the calculator. (Press F4 to close the calculator.)

If you enter a quantity, the Storage Unit field cannot be "EA." If you do not have a quantity, leave the field blank.

Do not individually count larger collections. Enter the number of linear feet, down to the tenth of a foot, required to shelve the collection. If you enter a figure in the Quantity field, leave the Item Count field blank and enter "LF" in the Storage Unit field.

Example: 5.25 linear feet = 5.25

❖ *Storage Unit*   User-built table (F5, Ctrl-F5). Default value "EA" when the Item Count is greater than zero. **To save the record, you must complete this field**. The storage unit will transfer to the Type of Unit subfield of the Extent formatted memo field in the collection level record of the Archives Module.

Choose a unit of measure from the user-built table. This is the unit of measure for the quantity. For archival/manuscript collections, the storage unit entry is usually "LF" for linear feet.

Example: LF   Linear Feet

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

❖ *Description*

Memo field (F12 to expand). The program will enter "Not Provided" if you do not complete this field. The data in this field will transfer to the Summary Note subfield of the Scope formatted memo field in the collection level record of the Archives Module.

Enter information about the contents, nature and extent of the collection, including:

- specific types, forms, and genres of materials (it is good practice to alphabetize lists of genre, form, and type terms), including the presence of bound, electronic, graphic, moving image, photographic, sound recordings, and other non-textual materials

- dates for the bulk of the material

- functions or activities resulting in the creation of the records, including the names of individuals, organizations, and groups involved in the activities resulting in the creation of the records

- most significant topics represented, including activities, animals, events, objects, persons, places, plants, professions, and structures

Note: When possible, include the extent of the materials, such as "12 linear feet of records, including approximately 3,000 photographs and 11.5 linear feet of correspondence and lists."

Example: "The State Commission on Conservation and Development Land Records" were generated by the State of Alabama in the process of acquiring land for the establishment of Agway State Park.

The types of materials in the collection include blueprints and diazo prints; drawings on bond paper, tracing paper, drafting vellum and coated linen in pencil, ink, colored pencil or crayon; handwritten notes and forms in pencil and ink; ledger sheets; newspapers; one overhead projection transparency; a few photographs; photocopies; return receipt cards; and typed letters and carbon copies. The collection includes blueprints, drawings, oversize materials, and photographs.

The records cover the period 1869 to 1995. The bulk of the collection contains material dated from 1927, when the claim forms started to be filled out, to 1934, when most of the land had been acquired. Included with this collection are tax appraisals for the years 1980-1993.

Note: This field can be viewed and edited from all other tabs except the discipline tabs.

You have completed the registration screen. Click on the Catalog tab or press Ctrl-N to go to the catalog screen.

2. *How do I complete the data fields on the catalog screen?*

Follow the field-by-field instructions for completing the fields on the catalog screen. The instructions for each field are on the left side of the screen as you add or modify a record.   Remember to press the Tab key to move out of a field.

Note: If you do not see the field help on the screen, go to View on the menu bar, go to Navigation Pane Options, and select Field Help.

Note: Fields marked with a ❖ in this manual are mandatory fields.
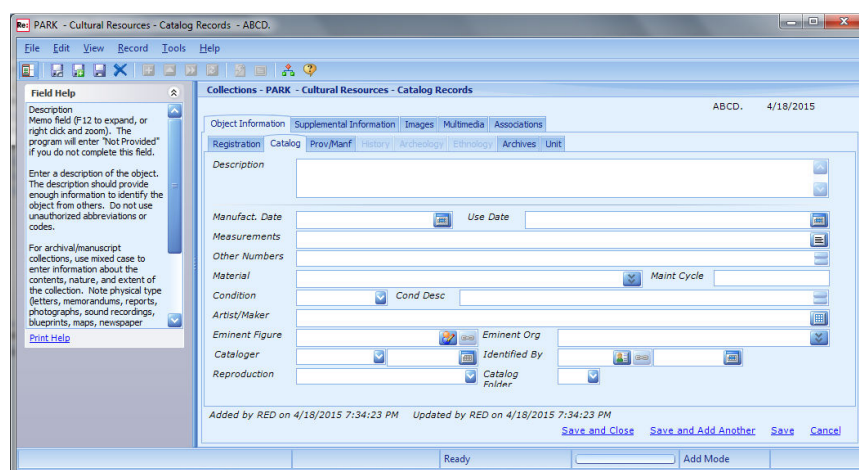
Manufacture Date (Manfact. Date)

Flexible date field.

Do not use this field for archival/manuscript collections. Use the Bulk Dates and Inclusive Dates fields on the archives specialty screen to document the creation dates for the collection.

Use Date

Flexible date field.

Do not use this field for archival/manuscript collections.

Measurements

Formatted memo field. Press F12, or right click and select zoom from the menu to expand the field, or click the formatted memo icon 🗏 located in the field. The field will also expand as you begin to type. The field will expand into four subfields: Dimensions, Weight, Volume, and Other. An underline separates the subfield entries on the screen.

Dimensions (memo field):

Do not use this field for archival/manuscript collections.

Weight (memo field):

Do not use this field for archival/manuscript collections.

Volume (memo field):

Do not use this field for archival/manuscript collections.

Other (memo field):

Enter the number and type of containers that house the collection. Specify the type of box when possible. Use the following abbreviations:

> AC=Archives Center (flip-top box)
> LG=Legal
> LT=Letter
> RC=Record Center (carton)
> FL=Flat (box-provide the box's dimensions)
> BX=Box

Example: 24.5 AC-LT BX, 5 AC-LG BX, 4 FL 17"x 24"

Other Numbers

Memo field (F12 to expand).

Enter other numbers associated with the collection, such as *National Union Catalog of Manuscript Collections (NUCMC)* numbers. If known, indicate a source for the other number.

Material

User-built, stacked table (F5, Ctrl-F5, F12).

Enter the predominant materials contained in the collection. To maintain consistent entries, develop a list of materials for the collection.

Note: Use the *AAT* to draw on terms from the Materials Hierarchy (MT). Right-click and choose Browse Lexicon to access the AAT terms.

Example: glass plate negative
daguerreotype
chalk
ink
paint
linen
audiotape
videotape
photographic negatives
prints
slides
transparencies
digital magnetic media

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Maintenance Cycle (Maint Cycle)

Straight entry numeric field.

Enter the cycle of years (up to 9.9 years) in which a condition check or preservation maintenance/treatment will be needed. You may enter one decimal place for a portion of a year. The year of initiation follows the slash (/).

Example: 5.0/1986 [entry for 5 years starting in 1986]
1.5/1990 [entry for 18 months starting in 1990]
0.5/1994 [entry for 6 months starting in 1994]

Use the Maintenance associated module to describe the type of maintenance that the material needs. Refer to Section VI of Chapter 4 for information on the Maintenance associated module.

❖*Condition*

Bureau controlled table (F5). History tracking field that links to the Condition Reports supplemental record. **To save the record, you must complete this field.** You may not add to, delete, or modify the terms in this table.

Do not use the terms from the table that describe completeness (com, inc, frg) for archival/manuscript collections. Enter the condition of the archival/ manuscript collection by choosing one of the following categories from the table:

Excellent [no damage or deterioration]
Good [minor damage and no active deterioration]
Fair [some damage and/or limited active deterioration]
Poor [significant damage and/or active deterioration]

Note: Place all collections with active mold, insect or vermin contamination, or asbestos or chemical contamination in the "poor" category.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

The program allows you to track changes in condition. If you modify a condition, the program will prompt you to enter a reason for the change. A history of condition changes appears in the Condition Reports supplemental record. Refer to Section V of Chapter 3 for additional information on the Condition Reports supplemental record.

Condition Description (Cond Desc)

Memo field (F12 to expand). History tracking field that links to the Condition Reports supplemental record.

Enter detailed descriptive information on the collection's condition. For example, make note of deterioration, tears, foxing, decomposition, and shrinkage.

Artist/Maker

Repeating formatted memo (F12 to expand)
The field is linked to the Artist/Maker/Eminent Figure associated module. The data in this field will transfer to the Creator/Origin field in the collection level record of the Archives Module.

Enter the name of the person, family, or corporate body chiefly responsible for creating or assembling the collection. The creator is determined based upon provenance (the history of creation and use of the collection) not authorship. For example, an individual's papers or an organization's records may contain items written by other individuals or organizations, such as incoming correspondence. However, the creator of the collection assembled these materials, integrating them into the collection.

Note: Refer to *Archives, Personal Papers, and Manuscripts* by Steve Hensen for guidance on entering personal and corporate names.
Personal Names: Enter the full name of the person who assembled the material or for whom the manuscript collection is named. Enter names in inverted order, last name followed by first name.

Example: Burton, Sir Richard [include title as part of name]
Carter, Jimmy [use most common version of name, not James Earl Carter]
Twain, Mark [use predominant name, not Samuel Clemens]

Family Names: Enter the full name of the family followed by the word "Family." Do not invert family names. A family name indicates that several generations, or a number of family members, generated the collection.

Example: J. Alden Weir Family
Abraham and Mary Todd Lincoln Family

Corporate Names: Enter the name in direct order, for example, as the name appears on letterheads. A corporate body has a particular name and acts as a group. Some examples of corporate bodies are government agencies, business firms, nonprofit associations, religious bodies, and maritime vessels.
Use the name most frequently used in corporate publications and records, or the name that occurs most frequently in the records. For corporate name changes, use the new form of the name, but refer to the old name as a cross- reference. For variant corporate names, use the form of name that appears on the chief source of information. In general, enter the most commonly used form of the name. Cross-reference to the less commonly used form.

Example: Franciscans [not Order of St. Francis]
National Park Service

Type in the field, press F12 or click the chart icon 🏛 to expand the field. The Artist/Maker – Repeating formatted memo screen appears.
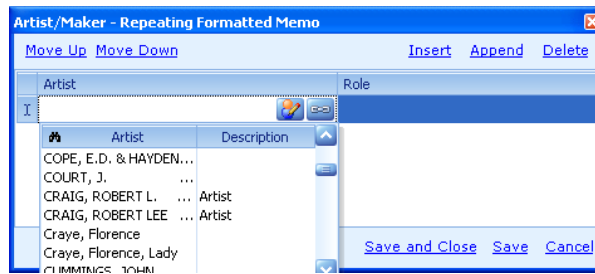
You can:

- add an artist/maker
- remove an artist/maker
- update the role of the artist/maker

To add an artist/maker:

Enter the last name, first name, and middle initial of the person or company that created or made the object.

As you type, the name will complete from an authority table of names in the Artist/Maker associated module. You can also press F5 or click the artist icon
 to view and select names from the table.

To add an artist/maker to the table, right-click in the Artist field and choose Browse Authority Table or press Ctrl-F5. Click <u>Add</u> to add a new entry. The Artist/Maker/Eminent Figure screen allows you to enter information such as birth and death years, accomplishments, and nationality. The entry you add will appear in the table.

Refer to Section XI of Chapter 4 for information on the Artist/Maker/ Eminent Figure associated module.

The entry from the table will appear on the Artist/Maker expanded screen. Click <u>Save and Close</u> to add the entry to the field on the main screen.

Note: The link icon next to the artist icon allows you to view the artist information for your entry.

To remove an artist/maker:

Click <u>Delete</u> or press Ctrl-Delete. This removes the entry from the catalog record but not from the table.

To update the role of the artist/maker:

Click in the Role field next to the artist/maker name in the expanded Artist/Maker screen. This is a user-built table (F5, Ctrl-F5). As you type, the word will complete from an authority table of acceptable terms. Press F5 or click the down arrow to view and select terms from the table. (Press Ctrl-Delete to remove unwanted entries.) Role information will appear in the Artist/Maker field after the name entry. The entries are separated with an underline.

Example: Stephens, Admiral Joseph __Personal

To add an entry to the table, right click in the Role field, select Browse Authority Table or press Ctrl-F5, then click <u>Add Term</u>. After entering the term, click <u>Save Change</u>. The entry you add will appear in the table. You can then select it from the table.

You can make multiple entries. On the expanded artist/maker screen, click <u>Append</u> or <u>Insert</u> and select another entry from the artist table. Click <u>Save and Close</u>. The program will separate the artist entries with double bars (‖).

Example: Sandburg, Carl __Personal ‖Sandburg, Margaret __Personal

Eminent Figure

User-built, stacked table (F5, Ctrl-F5, F12) that links to the Artist/Maker/Eminent Figure associated module.

Enter the full name, last name first, of the eminent person(s) directly associated with the collection through creation, use or possession. An eminent figure may be someone of international importance or someone of significance only to the site. To maintain consistent entries, develop a list of eminent figures related to the collection.

Example: Edison, Thomas A.

As you type, the name will complete from an authority table of names from the Artist/Maker/Eminent figure associated module.   Press the F5 key or click the artist icon 🔆 to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with appropriate security rights can press Ctrl-F5 to add, delete, or edit terms in the table. Click <u>Add</u> to add a new entry. The Artist/Maker/Eminent Figure screen allows you to enter information such as birth and death years, accomplishments, and nationality. The entry you add will appear in the table.

You can make multiple entries from the expanded field (F12). After entering the first term, click the <u>Add</u> link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Refer to Section XI of Chapter 4 for information on the Artist/Maker/ Eminent Figure associated module.

Click <u>Delete</u> or press Ctrl-Delete to remove unwanted entries.

Note: The record link icon 🖭 next to the artist icon allows you to view the Artist/Maker record for your entry.

*Eminent Organization
(Eminent Org)*

User-built, stacked table (F5, Ctrl-F5, F12).

Enter the full organizational name of the eminent organizations that are directly associated with materials in the collection through creation, use, or possession. An eminent organization may be of international importance or of significance only to the site. To maintain consistent entries, develop a list of eminent organizations related to the collection.

Example: Union Pacific Railroad

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

❖*Cataloger*

User-built table (F5, Ctrl-F5). **To save the record, you must complete this field.**

Enter the full name, last name first, of the person who cataloged the collection.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

Note: Change this field only when you make a significant modification to the record. Do not change the cataloger for minor modifications, such as location changes.

Catalog Date

Date field. (**Note:** This date field is not labeled on the screen.)

Enter the numeric month, day, and full year that the object was cataloged. The program will autofill as you type. To view a calendar and select the date, click the calendar icon 📅 and click on the day.

Example: 4/30/1994

Identified By

User-built, stacked table (F5, Ctrl-F5, F12) that links to the Names and Addresses associated module.

Enter the full name of the person, last name first, who identified the material.

Example: Jones, Sarah

As you type, the word will complete from an authority table of names in the Names and Addresses associated module. Press the F5 key or click the person icon 👤 to view and select names from the table, or press F12 for an expanded

field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify names in the table. To add a name to the table, right click in the field, and select Browse Authority Table or press Ctrl-F5, then click Add Term. The Names and Addresses associated module screen will appear. Enter the name in the Name ID field and complete the other fields on the screen. You can also press F12, click on the Edit Authority Table link, and then click Add. The entry you add will appear in the table. You can then select it from the table.

You can make multiple entries from the expanded field (F12). After entering the first name, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another name from the table. When saved, a double dash -- separates terms.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Refer to Section XII of Chapter 4 for information on the Names and Addresses associated module.

Note: The record link icon ▱ next to the person icon allows you to view the Names and Addresses record for your entry.

Identified Date   Flexible date field. (**Note:** This date field is not labeled on the screen.)

Enter the date that the identifier identified the collection. Enter the most complete date possible and the full year.

You can enter the date directly in the field or click the calendar icon ▦ for the flexible date entry screen. The flexible date entry allows you to enter a beginning and ending date by century or year, month, and day. It includes a user-built table of modifiers, for entries such as "circa." Refer to Chapter 1, System Basics, for additional information on flexible date fields. Use of the flexible date screen is optional.

Reproduction   Bureau controlled table (F5). You may not add to, delete, or modify the terms in this table.

Choose from the four entries in the table:

>   Original to Site
>   Period Piece [not applicable for archival/manuscript collections]
>   Reproduction
>   Site-Associated

Choose Original to Site if the collection as a whole consists of documents that are original to the site.

Choose Site-Associated if the collection as a whole consists of documents that are associated to the site.

Choose Reproduction if the collection as a whole is a copy or duplicate, such as microfilm, photographic duplicates, or xerographic copies.

As you type, the word will complete from an authority table of acceptable terms.

Press the F5 key or click the down arrow icon to view and select terms from the table.

Press Ctrl-Delete to remove unwanted entries.

Catalog Folder

Logical Y/N field.

Select "Y" (Yes) if a catalog folder exists for the collection.

Select "N" (No) if there is no catalog folder for the collection.

Refer to the *MH-II*, Chapter 3, Cataloging, or the *MPH-II*, Chapter 3, Cataloging, for information on catalog folders. A catalog folder is of increased importance when a collection has many accession numbers.

You have completed the catalog screen. Click on the Prov/Manf tab or press Ctrl-N to go to the provenience/manufacture screen.

3. *How do I complete the data fields on the provenience/ manufacture screen?*

Follow the field-by-field instructions for completing the fields on the provenience/manufacture screen. The instructions for each field are on the left side of the screen as you add or modify a record. Remember to press the Tab key to move out of a field.

Note: If you do not see the field help on the screen, go to View on the menu bar, choose Navigation Pane Options, and select Field Help.

Note: None of the fields on this screen are mandatory for archival/manuscript collections.

Related Collections (Related Collct)

Memo field (F12 to expand).

The data in this field will transfer to the Other subfield of the Associated Materials/Related Collections formatted memo field in the collection level record of the Archives Module.

Record information about materials related to the collection. Related materials

may contain similar subject matter or be from the same or closely related provenance. For example, a presidential library may have collections related to an archival collection in a presidential home.

It is helpful to provide information on the location of the related collections. To locate materials, you should include: the collection name; the library or archival repository name; the division, such as Special Collections; and the institution name.

Note: Related collections are not reproductions, published versions, or studies based on the materials.

Example: Historical record photographs are at Virginia State Archives, the Marshal Tidmouse Library, Smeklit Collection, RU96, Series 5.

Site of Original Collection/Provenience Section:

Field Site Number
(Field Site #)

Straight entry field.

Enter the field site number for field records.

Within Site Provenience
(Within Site)

Memo field (F12 to expand).

Do not use this field for cataloging archival/manuscript collections.

State Site Number
(State Site #)

Straight entry field.

Enter the state site number for field records..

Place of Origin
(Origin)

Repeating Formatted memo field.
Begin typing, or press F12, or click the chart icon ⊞ to expand the field. This field will expand into four subfields: City, County, State, and Country. When saved, an underline __ separates terms, and double bars ‖ separate rows. All subfields are user-built tables (F5, Ctrl-F5).

Use the subfields to enter the city, county, state, and country where the collection was held prior to NPS acquisition.

City (user-built table):

Enter the city, if known, where the collection was held prior to NPS acquisition.

Example: San Francisco
         Tucson

County (user-built table):

Enter the county, parish, or other legal jurisdictional unit (recognized by the US Postal Service), if known, where the collection was held prior to NPS acquisition.

Example: Orange
         York

State (user-built table):

Enter the state or province, if known, where the collection was held prior to NPS acquisition. Use the two-letter US Postal Code when applicable. The program includes a table for all states. For countries other than the US, enter the corresponding legal jurisdiction area.

Example: NC
          CA

Country (user-built table):

Enter the country, if known, where the collection was held prior to NPS acquisition.

Example: Ireland
          USA

As you type in any of the subfields, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

To enter multiple rows in the repeating formatted memo, click Insert or Append. Insert will place a new row above the currently selected row. Append will add a new row to the bottom. To delete a selected row, click Delete. Click Save and Close when finished.

Site Name	Memo field (F12 to expand).
	Enter the name of the repository, if applicable, where the collection was held prior to acquisition. For field records, enter the archeological or natural history site name.
	Example: California State Archives
UTM Coordinates (UTM Z/E/N)	Straight entry numeric field.
	Do not use this field for cataloging archival/manuscript collections.
Latitude and Longitude (Lat Long N/W)	Formatted Memo field (F12, begin typing, or right click and zoom to expand the field).
	Do not use this field for cataloging archival/manuscript collections.
Township/Range/Section (TRS)	Formatted memo field (F12, begin typing, or right click and zoom to expand the field).
	Do not use this field for cataloging archival/manuscript collections.

Reference Datum   User-built authority table (F5, Ctrl-F5)

                                         Do not use this field for cataloging archival/manuscript collections.

                                         Site of Manufacture Section:

Place of Manufacture   Repeating Formatted memo field.
(Place of Manuf)   Begin typing, or press F12, or click the chart icon ⊞ to expand the field. This
                                         field will expand into four subfields: City, County, State, and Country. When
                                         saved, an underline __ separates terms, and double bars ‖ separate rows. All
                                         subfields are user-built tables (F5, Ctrl-F5).

                                         Use the subfields to enter the city, county, state, and country where the creator
                                         created or assembled the majority of the collection. If the collection consists of
                                         transcripts or copies of original materials, enter the location of the originals, if
                                         they exist.

                                         City (user-built table):

                                         Enter the city, if known, where the creator created or assembled the majority of
                                         the collection.

                                         Example: Santa Fe
                                                    Madison

                                         County (user-built table):

                                         Enter the county, parish, or other legal jurisdictional unit (recognized by the US
                                         Postal Service), if known, where the creator created or assembled the majority
                                         of the collection.

                                         Example: Orange
                                                    York

                                         State (user-built table):

                                         Enter the state, if known, where the creator created or assembled the majority of
                                         the collection. Use the two-letter US Postal Code. The program includes a
                                         table for all states. For objects manufactured in countries other than the US, enter
                                         the corresponding legal jurisdiction area.

                                         Example: FL
                                                    MA

                                         Country (user-built table):

                                         Enter the country, if known, where the creator created or assembled the majority
                                         of the collection.

                                         Example: USA
                                                    France

                                         As you type in any of the subfields, the word will complete from an authority
                                         table of acceptable terms. Press the F5 key or click the down arrow icon to
                                         view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.
Press Ctrl-Delete to remove unwanted entries.

To enter multiple rows in the repeating formatted memo, click Insert or Append. Insert will place a new row above the currently selected row. Append will add a new row to the bottom. To delete a selected row, click Delete. Click Save and Close when finished.

Other Manufacturing Site (Other Mfg Site)

Memo field (F12 to expand).

Enter any additional information about where the creator created or assembled the majority of the collection.

Example: Weir Farm
              Sagamore Hill

Historic/Cultural Period (Hist/Cult Per)

User-built, stacked table (F5, Ctrl-F5, F12).

Enter a distinctive stylistic or historical period that relates to the bulk of the collection. The entry in this field should fit within the time frame of the Bulk Dates field on the archives specialty screen. To maintain consistent entries, develop a list of periods for the collection.

Example: Colonial
              Victorian

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Cultural ID

User-built, stacked table (F5, Ctrl-F5, F12).

Enter the cultural affiliation of the material or the maker.

Use this field only if you can trace the collection to a specific cultural group, such as the Irish or the Hopi, or to a specific affiliation, such as the Catholic Church or the Democratic Party.

Example: Pennsylvania Dutch
          Cajun

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

NAGPRA

User-built, stacked table (F5, Ctrl-F5, F12).

Do not use this field for cataloging archival/manuscript collections.

Culture of Use
(Cult. of Use)

User-built, stacked table (F5, Ctrl-F5, F12).

Do not use this field for cataloging archival/manuscript collections.

You have completed the provenience/manufacture screen. Click on the Archives tab or press Ctrl-N to go to the Archives screen.

4. *How do I complete the data fields on the archival/ manuscript collection specialty screen?*

Follow the field-by-field instructions for completing the fields on the archival/manuscript collection specialty screen. The instructions for each field are on the left side of the screen as you add or modify a record. Remember to press the Tab key to move out of a field.

Note: If you do not see the field help on the screen, go to View on the menu bar, scroll to Navigation Pane Options, and select Field Help.

Note: None of the fields on this screen are mandatory for archival/manuscript collections.
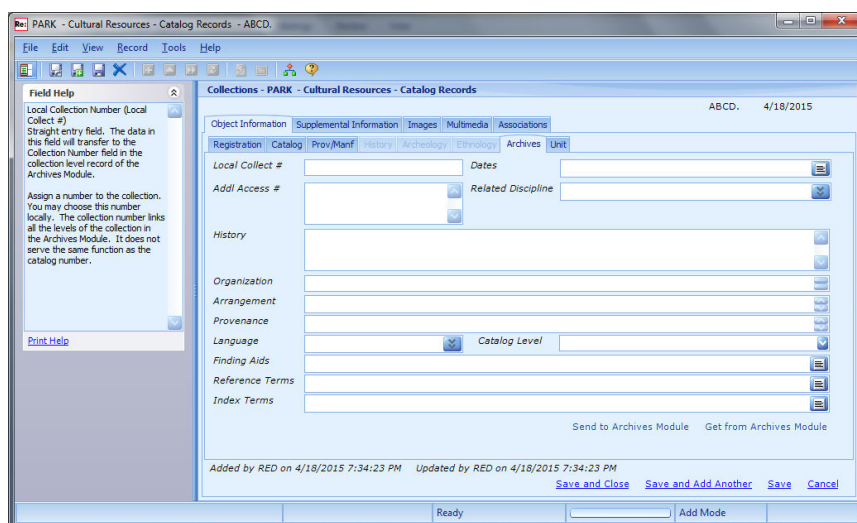
**Local Collection Number
(Local Collect #)**

Straight entry field. The data in this field will transfer to the Collection Number field in the collection level record of the Archives Module.

Assign a number to the collection. You may choose this number locally. The collection number links all the levels of the collection in the Archives Module. It does not serve the same function as the catalog number.

Dates

Formatted memo field. Press F12 or right click and select zoom from the menu to expand the field, or click the formatted memo icon ▤ located in the field. The field will also expand as you begin to type. The field will expand into two subfields: Inclusive Dates and Bulk Dates. An underline separates the subfield entries on the screen.

Inclusive Dates (memo field):

The data in this field will transfer to the Inclusive Dates field in the collection level record of the Archives Module.

Enter the inclusive dates of the materials found in the collection, for example, 1900-1960. Inclusive dates tell you that the earliest document dates from the first date and the latest document dates from the latter date. Always enter the full year.

Bulk Dates (memo field):

The data in this field will transfer to the Bulk Dates field in the collection level record of the Archives Module.

Enter the date range for the majority of the collection. For example, 1928-1957 may be the bulk dates for a collection with inclusive dates of 1900-1960. The bulk dates indicate that most of the collection dates from 1928-1957. Always enter the full year.

**Additional Accession Numbers
(Addl Access #)**

Memo field (F12 to expand). The data in this field will transfer to the Additional Accession Numbers field in the collection level record of the Archives Module.

An archival collection may be composed of many accessions, as long as the

accessions have the same provenance. Enter the additional accession numbers associated with the collection. Use the same format for the number as you do in the main Accession Number field on the Registration tab.

NPS Examples: EDIS-00001, FRLA-0006l
DOI Examples: BLM 2009.01, BOR 00135

Note: The collection-level survey record and finding aids should note if a collection includes multiple accessions. Copies of the collection-level survey description belong in the accession file of each accession that forms part of the collection.

Related Discipline

Related Discipline
DOI controlled stacked authority table (F5, F12)
You may not add to, delete, or modify terms in this table.

Enter the discipline(s) related to this archival collection. Choose term(s) from the table. You may not add to, delete, or modify the entries for this field.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

History

Memo field (F12 to expand). The data in this field will transfer to the Brief Note subfield of the History formatted memo field in the collection level record of the Archives Module.

Enter a biographical or historical note about the creator of the collection. Enter information that will help to make the nature and scope of the collection clear. For personal papers, provide significant information about the life and activities of the person who generated the collection, including:

- dates and places of birth and death

- variant names

- education

- occupation

- significant accomplishments

For family collections, identify the members of the family and their relationships and significant biographical facts about each.

For corporate bodies, identify the structure, function, purpose, and history of the organization that created or accumulated the collection, including:

- dates of incorporation and dissolution

- location of operations

- variant names

- hierarchical location (sibling and parent organizations)

- corporate functions, activities and products

- brief administrative history

Example: Warren E. Miller (1839-1927). Born in Newport, RI, Miller was the son of a fisherman. Educated at the Smith Academy between 1844-1850, Miller excelled at mechanics. In 1851, Miller was hired by Belco Industries as an assistant shipwright. He worked there for the next 50 years, progressing to president of the company, renamed Quantum Enterprises in 1900.

Miller led Quantum to a period of growth based upon his development of modern underwater mining techniques, including the patenting of underwater tools. Much of the company's prosperity was due to a shrewd series of expansions from 1895-1900, as well as the collaboration with inventor Michael Max. Miller left Quantum in 1913, dying of a stroke at his home in Midford, Conn. in 1927. He was survived by his wife of fifty years, Midge Bell Miller, and his two children, Clara Miller Cassidy (43) and Marcus Miller (36).

Organization   Memo field (F12 to expand). The data in this field will transfer to the Organization subfield of the Organization/Arrangement formatted memo field in the collection level record of the Archives Module.

Describe the structure of the collection.

Example: Organized into 5 series by type of land file document (tract, boundary survey, land appraisal, planning commission permissions, and tax assessment).

Arrangement   Memo field (F12 to expand). The data in this field will transfer to the Arrangement subfield of the Organization/Arrangement formatted memo field in the collection level record of the Archives Module.

Enter the actual listing of the subunits of the collection. List the title of the subunit and a note as to its specific arrangement.

Example: 1. Tract Files by County, arranged alphabetically by county, then alphabetically by applicant's last name.
2. Boundary Survey Files, arranged chronologically by file date, then by filing agent's last name.
3. Land Appraisal Files, arranged chronologically by date of appraisal, then by tract number.
4. Planning Commission Permissions, arranged alphabetically by applicant's last name, then in increasing numerical order by assigned county lot number, then by date.
5. Tax Assessment, arranged by year, then by last name of filer, then in increasing numerical order by county lot number.

Provenance	Memo field (F12 to expand). The data in this field will transfer to the Provenance field in the collection level record of the Archives Module.

Describe the collection's origin and history of ownership from the time of creation to the time of accession. Include information on successive transfers of ownership and custody of the materials. Include the date when individual items or groups of items were first brought together in their current arrangement or collation.

Example: Warren E. Miller, the owner/operator of the Railway Negative Exchange of San Francisco, California, from 1946-1987, assembled this collection of maritime-related photographs from a variety of materials he purchased or traded for during the course of his career. Miller purchased the major portion of the collection, the records of the Board of State Harbor Commissioners (1898-1965), from a state auction in 1967, following the closing of the Commission. In 1987, Miller donated the collection to the San Francisco Maritime National Historical Park.

Note: The *Library of Congress Name Authorities* provides controlled vocabulary for names of individuals, groups, and organizations.

Language User-built, stacked table (F5, Ctrl-F5, F12). The data in this field will transfer to the Language Note subfield of the Language formatted memo field in the collection level record of the Archives Module.

Record the language(s) of the materials in the collection. A standard source for languages is the OCLC-MARC Language Codes.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Catalog Level Bureau controlled table (F5). The data in this field does not transfer to the Archives Module. You may not add to, delete, or modify the terms in this table.

Indicate the level of processing that has been accomplished for the collection. Choose from the five entries on the table.

Level Control, Collection Choose this entry if you can complete all applicable fields on the catalog record,
(Lvl Ctrl, Collectn) including the archives specialty screen fields. You may want to transfer the data from the catalog record to the collection level record in the Archives Module.

Note: All collections should eventually reach this level of control.

Level Control File Unit (Lvl Ctrl, File Unit)

Choose this entry if the collection has been processed to the file unit level. You may want to complete the file unit level screen in the Archives Module. You can repeat the screen as needed.

Note: A file unit is generally a single folder of any size containing multiple documents. You may not want to, or need to, provide file unit descriptions. You may skip this level.

Level Control Item (Lvl Ctrl, Item)

Choose this entry if the collection has been processed to the item level. You may want to complete the item level screen in the Archives Module. You can repeat the screen as needed.

Note: Very few collections are processed to the item level. However, for some collections, such as photographic collections, you may want item level control. You may also want item level control for certain significant items within a collection.

Level Control, Series (Lvl Ctrl, Series)

Choose this entry if the collection has been processed to the series level. You may want to complete the series level screen in the Archives Module. You can repeat the screen as needed.

Note: Not all collections contain series. You may skip this level.

Unprocessed, Collection (Unproc, Collectn)

Choose this entry if you do not have enough data on the collection to complete the archives specialty screen fields.

As you type, the program will autofill the entry from the table. Press F5 to access the table. To choose an entry from the table, highlight the entry, and press the Enter key.

Finding Aids

Formatted memo field. Press F12, or right click and select zoom from the menu to expand the field, or click the formatted memo icon ▤ . The field will also expand as you begin to type. The field will expand into seven pairs of subfields and one memo field. Each pair of subfields consists of a Finding Aid subfield and a Level of Control subfield. An underline separates the subfield entries on the screen.

The data in this field will transfer to the corresponding subfields of the Finding Aids formatted memo field in the collection level record of the Archives Module.

Record any existing finding aids and the level of control they provide for materials in the collection. This includes finding aids developed by the creator, unit, and finding aids in the Archives Module.

Finding Aid (memo field):

Enter a finding aid, such as a subject guide, descriptive inventory, accession register, card catalog, index, or shelf and box list. A finding aid can be any textual or electronic tool that assists researchers in locating or using the collection. If possible, include the information needed to locate the finding aid, including:

- author, title, place of publication or creation, and date

- the type of finding aid, such as desk-top published guide

- ordering information, such as source, cost, and format

Note: You may want to enter a citation for a published guide in the Publication Citation supplemental record.

Level of Control (Bureau controlled table):

Choose one of the entries from the table. You may not add to, delete, or modify the terms in this table. The program will pair this entry with the finding aid.

The level of control indicates the degree of control that you have over the materials. Refer to the Catalog Level field above for a list of entries in the table.

Example: Index of vessel names_LVL CTRL, ITEM
Box list_LVL CTRL, COLLECTN

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Other (memo field):

This additional memo field is available to add information about the finding aids.

Reference Terms

Formatted memo field. Press F12, or right click and select zoom from the menu to expand the field, or click the formatted memo icon located in the field. The field will also expand as you begin to type. The field will expand into four subfields: Personal Name, Corporate Name, Geographic Name, and Topic. An underline separates the subfield entries on the screen.

The data in this field will transfer to the corresponding subfields of the Reference Terms formatted memo field in the collection level record of the Archives Module.

All subfields are user-built, stacked tables (F5, Ctrl-F5, F12). As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click <u>Add Term</u>. After entering the term, click <u>Save Change</u>, then click <u>Select</u> to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the <u>Add</u> link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click <u>Delete</u> or press Ctrl-Delete to remove unwanted entries.

Note: The table for each reference term subfield includes a field for description. If you choose the term from an authority list, such as the *Library of Congress Subject Headings*, enter the authority in the description. If you use a local term, enter "Local" in the description.

Note: The *Library of Congress Name Authorities* provides controlled vocabulary for names of individuals, groups, and organizations. Refer to *Archives, Personal Papers, and Manuscripts* by Steve Hensen for guidance on entering personal and corporate names.

Personal Name (user-built, stacked table):

Enter personal or family names that are subjects of the materials in the collection. That is, the material is about the person or family. You can also enter names of additional creators, such as correspondents.

Enter names in inverted order, last name followed by the first name. For family names, enter the full name of the family followed by "Family."

Example: Ford, Henry
            Carl Sandburg Family
            Burton, Sir Richard [include title as part of name]
            Twain, Mark [use predominant name, not Samuel Clemens]
            Queen Elizabeth II [use Junior, Senior, III, etc., as part of name]

Corporate Name (user-built, stacked table):

Enter corporate names that are subjects of the materials in the collection. A corporate body has a particular name and acts as a group. Some examples of corporate bodies are government agencies, business firms, nonprofit associations, religious bodies, and maritime vessels.

Enter the name in direct order.

Example: Ford Motor Company
            National Park Service
            Franciscans [not Order of St. Francis]
            Bureau of Indian Affairs

Use the name most frequently used in corporate publications and records, or the name that occurs most frequently in the records. For corporate name changes, use the new form of the name, but include the old name as a cross-reference. In general, enter the most commonly used form of the name.

Geographic Name (user-built, stacked table):

Enter geographic place names that are subjects of the materials in the collection.

Example: Detroit, Michigan
            Ferry Building (San Francisco, CA)

Topic (user-built, stacked table):

Enter topical terms about the subjects of the collection, such as activities, animals, events, objects, places, plants, and structures.

Example: volcanoes
expeditions
fossils
chairs
textiles
battlefields
ceremonies
harbors

Index Terms

Formatted memo field.

Press F12, or right click and select zoom from the menu to expand the field, or click the formatted memo icon ▤ located in the field. The field will also expand as you begin to type. The field will expand into four subfields: Form, Genre, Occupation, and Function. An underline separates the subfield entries on the screen.

The data in this field will transfer to the corresponding subfields of the Index Terms formatted memo field in the collection level record of the Archives Module.

All subfields are user-built, stacked tables (F5, Ctrl-F5, F12). As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Note: The table for each index term subfield includes a field for description. If you choose the term from an authority list, such as the *Library of Congress Subject Headings*, enter the authority in the description. If you use a local term, enter "Local" in the description.

Form (user-built, stacked table):

Enter terms that describe the physical characteristics of the materials in the collection. Form terms may include processes, techniques, production stages or versions, instruments used during creation, shape and size of the work, markings, and other physical aspects of the material.

Example: card photograph
engraving
lantern slide
proof
woodcut
computer graphic

Genre (user-built, stacked table):

Enter terms that refer to distinctive categories of materials. These include pictorial types, such as cartoons; vantage points or methods of projection, such as perspective projections; and works with a special purpose, such as advertisements. These works may also indicate characteristics of an image's creator, such as a student work; or a publication status or occasion, such as censored works or birthday cards. Others imply a subject as well as a method of representation, such as abstract works.

Example: landscapes
        death certificates
        ephemera
        games
        letterheads
        maps
        photograph albums
        programs

Occupation (user-built, stacked table):

Enter the occupations reflected in the collection.

Example: physician
        pile-driver operator
        poet
        cavalry officer

Function (user-built, stacked table):

Indicate the activities or functions that brought the records into being.

Example: stabilization project
        environmental monitoring
        waterfront construction

5. *How do I transfer data from the catalog record to the Archives Module?*

Note: Before you can transfer data from the catalog record to a collection level record in the Archives Module, the table sharing must be set up to connect the two directories. See Section VII of Chapter 9 for information on establishing table sharing between the collection and archives directories.

In Modify Mode only, click on the Send to Archives Module link at the bottom of the page, or tab to the link and press the Enter key. You will see the question, "Are you sure that you want to send data from Catalog Number ### to the Collection Level in the Archives Module?" Click No to return to the archives screen. Click Yes to transfer the data. The data on the catalog record will transfer to the corresponding collection level fields in the Archives Module. You will receive a message that the catalog data has been added or updated in the Archives Module. Click OK.

If a matching collection level record exists in the Archives Module, the information will be updated. If a matching record does not exist, a new collection record will be created.

Note: Any existing data on the collection level record in the Archives Module will be lost when you transfer data from the catalog record. Before transferring data it is best to go to the Archives Module to see if there is a collection level record already there. It is very important to set up procedures for the transfer of data from the catalog record to the Archives Module.

6. *How do I get to the Archives Module?*

To go to the Archives Module from the collections module:
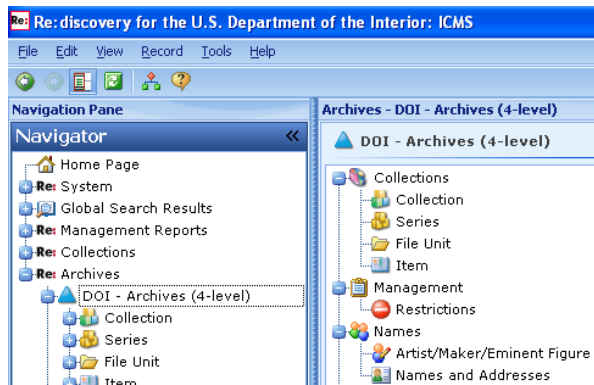
In the Navigator on the left side of the screen, expand the tree view for the Archives module by clicking on the ⊞ in front of it (if it is already expanded you will see the ⊟ icon).

Under Archives, expand the tree view for the Archives directory for your unit by clicking on the ⊞ in front of it (if it is already expanded you will see the ⊟ icon).

Under your archives directory, click on Collection.

You should see the first record in the collection level of your Archives directory. Scroll down the List Pane and click on the collection number or title that you transferred. The record will appear in the Record Pane below.

7. *Can I transfer data from the Archives Module to the catalog record?*

Yes. In Modify Mode only on the catalog record Archives page, click on the Get from Archives Module link at the bottom of the page, or tab to the link and press the Enter key. You will see the question "Are you sure that you want to get data for Catalog Number #### from the Collection Level in the Archives Module?" Click No to return to the catalog record. Click Yes to get the data from the Archives module. The data from the collection level record in the Archives Module will transfer to the corresponding fields on the catalog record. You will get a confirmation that the data was updated. Click OK.

You must include the catalog number in both modules to do this transfer.

Note: Any existing data on the catalog record will be lost if you transfer data from the Archives Module. It is very important to set up procedures for the transfer of data from the Archives Module to the catalog record.

You have completed the archives screen. Click on the Unit tab or press Ctrl-N to go to the unit screen.

8. *How do I complete the data fields on the unit screen?*

There are ten user-defined fields on the unit screen. Enter data in these fields that are unit-specific and that do not fit on the other four screens.

Note: All disciplines in the CR directory share the ten unit fields. You may want, or need, to reserve some user fields for archeology, ethnology, and/or history records.

In addition, there are two fields used by the Web Catalog. Refer to Appendix X in this manual for further information about the Web Catalog.
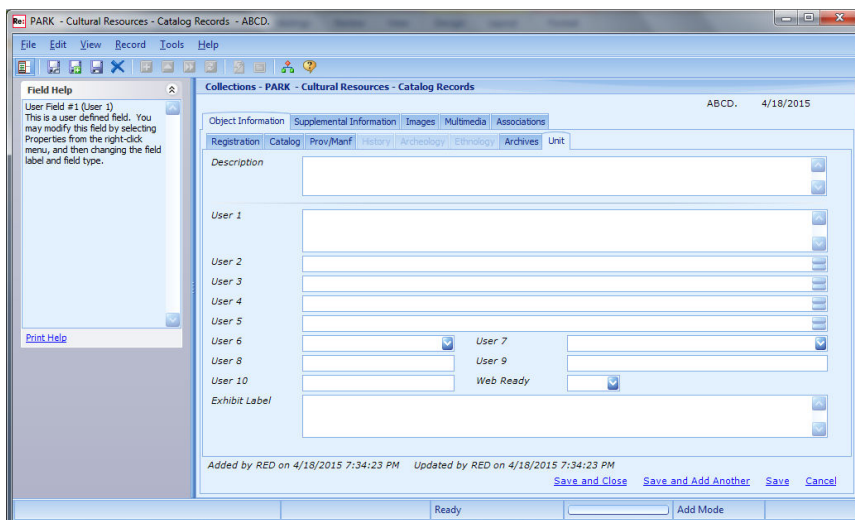
If you are authorized, you may modify each field label by right clicking and selecting Properties. In the Field Properties screen click the modify button on the button bar or select Modify This Record on the Edit menu. Then, select the Default Label/Help tab. Change the label and field type as needed.

Example: Field Label = Weather
Field Type = Memo

Refer to Chapter 1, System Basics, for additional information on defining user fields and a description of field types.

Web Ready

Y/N logical field

Select "Y" (Yes) if the catalog record is ready for publication on the Web Catalog.

Records published on the Web Catalog should be accurate and complete. Check the records for typographical errors. Use the Exhibit Label field to include enough detail to allow the general public to understand the nature and significance of the object. A high-quality image of the object is recommended.

Do not mark as Web Ready any records for deaccessioned objects, returned loans, or draft status records. Do not mark as Web Ready any records for objects on loan from non-bureau sources. Do not mark as Web Ready any records for human remains, or NAGPRA materials.

The Web Catalog will publish only Web Ready records. You can update the Web Ready field for groups of records by selecting the records and using the Modify All option on the Edit menu.

The Web catalog does not display sensitive data such as object location, site of provenience, or value.

Exhibit Label

Memo field (F12 to expand, or right click and zoom).

Use the Build Exhibit Label function on the Edit menu to select fields to include in the Exhibit Label field. Then use Modify All Records on the Edit menu, and enter {exhibit label} in the Exhibit Label field to automatically complete this field for groups of records. See Appendix X: Web Module for information on the Build Exhibit Label function.

You may also complete this field manually. Enter a description of the object suitable for public display in a physical or web-based exhibit. You may also paste in label text from other sources such as on-line exhibits or electronic documents.

6. *How do I use the Build Exhibit Label function?*

The Build Exhibit Label function lets you select fields to include in the Exhibit Label field on the Unit tab of the catalog record. You can then use Modify All Records to automatically complete the Exhibit Label field for groups of catalog records. It is only available for Cultural Resources and Natural History catalog records.

To use the Build Exhibit Label function:

- From the Catalog Record screen in either your CR or NH directory, go to the Edit menu and select Build Exhibit Label.
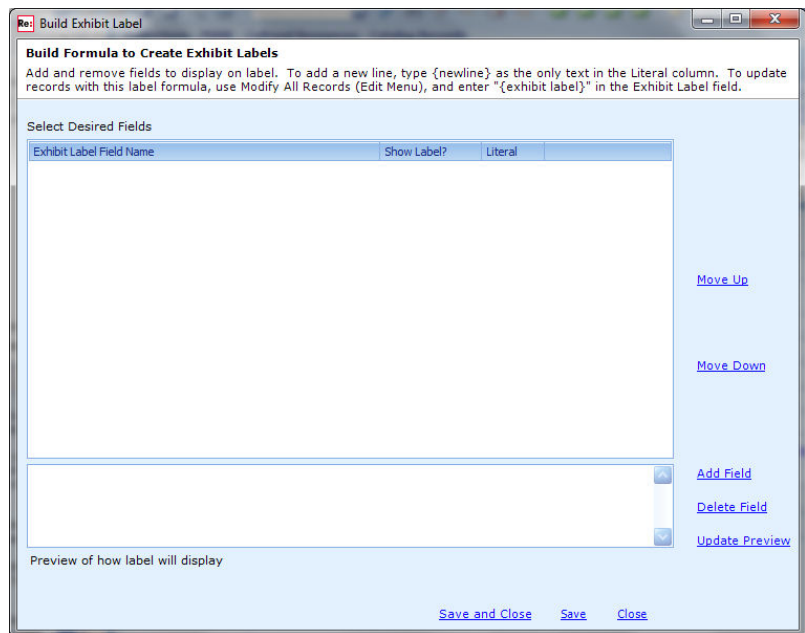
- Click Add Field at the lower right to add a field selection row to the desired field list.
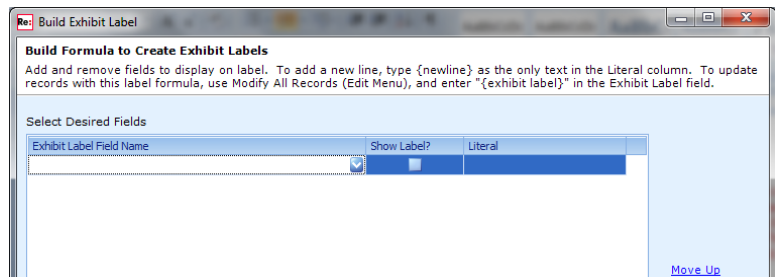
- Click the pull-down in that row to select the field to include in the exhibit label.

- If you wish to show the field label for this field, check the "Show Label?" box.

- To include a hard return after a field, enter {newline} in the Literal column for that field. You can also use the Literal column to add punctuation between fields.

- Continue using Add Field and making your selections until you have all the desired fields in the list.

  Note that the box at the bottom of this screen shows how the label will display in the Exhibit Label field.

- To remove a field from the list, highlight the row and click Delete Field

- To change the order of the fields, highlight a row in the list and use the Move Up and Move Down links.

- Click Update Preview to refresh the layout preview whenever you have made changes to the field list.

- When you have finished selecting and arranging the fields for the exhibit label, click Save and Close.

You are now ready to automatically update the Exhibit Label field on your selected catalog records as follows:

- Select a subset of your records by either activating a tag set, filter or highlighting multiple records in the List Pane.

- From the Edit menu, select Modify All Records.
  - In the Modify All wizard, click Next
  - Select whether to update records of a specific discipline or all disciplines. Click Next.
  - Select the Unit tab and enter {exhibit label} in the Exhibit Label field. Note: you must include the brackets.
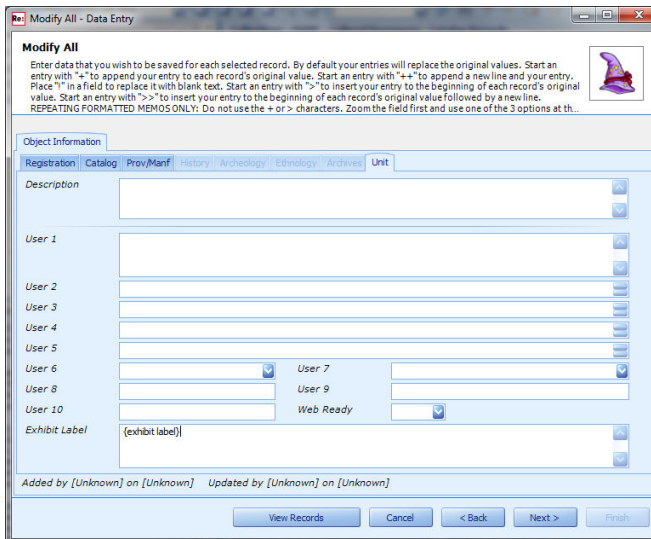
  - Click Next
  - Verify that it will be updating the Exhibit Label field with the indicated value and click Finish.

All the selected records will now have the Exhibit Label field completed with the fields you selected in the Build Exhibit Label function.

You can change the fields in the Build Exhibit Label function at any time and update other records or the same records using the above steps.

D. Saving the Record

1. *What is the Track Changes screen that appears when I save a catalog record?*

When you save a catalog record, the program will prompt you for information to track location, condition, and catalog notes for the object. The system will create supplemental records from the information you provide. The supplemental records allow you to see on one screen all the changes in location, condition, and cataloging activity for the object.

You may choose to not create the supplementals and still save the record. This saves a small amount of time when entering or modifying records. However, the benefits of having location, condition, and catalog activity histories outweigh the time it takes to create them. Taking advantage of this feature in the program is highly recommended.

When creating a supplemental for tracking, you have the choice of accepting the default entries on some fields in the supplemental, or manually updating the supplemental fields.

To not create a supplemental, click the Do Not Update box on the supplementals you do not wish to create.

Click <u>OK</u> to save the entries from the Track Changes screen in the supplemental records.

Do not click the <u>Cancel</u> link here or you will cancel the entire record, not just the supplemental update.

---

2. *How do I complete the condition tracking supplemental?*

If you add or change a condition in the Condition or Condition Description fields, the program will include the Condition Reports supplemental in the Track Changes screen when you save the record. Complete the Condition Reason field manually. The Condition Reason field is a user-built table (F5, Ctrl-F5). Enter the reason for the condition.

Example: Water Damage
            Conservation

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click <u>Add Term</u>. After entering the term, click <u>Save Change</u>, then click <u>Select</u> to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

You can also change the Date and/or Condition Description if needed. These fields are set to use automatic values. To change the entries, select "Manually update value" from the pull down menu next to the field.

Note: The entry from the Condition Description field appears on the update screen. If you have no entry in the Condition Description field, the field on

the prompt screen will be blank. You can enter a condition description on the prompt screen, but it will not transfer back to the catalog record.

Refer to Section V of Chapter 3 for additional information on the Condition Reports supplemental record.

<table>
<tr><td>3. *How do I complete the location tracking supplemental?*</td><td>If you add or change a location, the program will include the location supplemental in the Track Changes screen when you save a record. Complete the Location Reason field manually. The Location Reason field is a user-built table (F5, Ctrl-F5). Enter the reason for the location.</td></tr>
</table>

Example: Storage
     Exhibit

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

Note: For permanent locations, enter ˝Permanent Location˝ in the Location Reason field. This entry will allow you to print an Object Temporary Removal Slip (NPS Form 10-97) to document removal from a permanent location.

You can also change the Authorized by and Start Date if needed. These fields are set to use automatic values. To change the entries, select "Manually update value" from the pull down menu next to the field.

Refer to Section XII of Chapter 3 for additional information on the Location supplemental record.

<table>
<tr><td>4. *How do I complete the catalog notes tracking supplemental?*</td><td>If you add or change a catalog record, the program will include the Catalog Notes supplemental in the Track Changes screen when you save the record. All entries are autofilled from the previous data entry session. To change the entries for any of the fields, select "Manually update value" from the pull down menu next to the field.</td></tr>
</table>

The Cataloger field is a user-built table (F5, Ctrl-F5). Enter the last name of the cataloger.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

Note: The name you enter at the prompt does not change the name in the Cataloger field on the record.
The Level field is a Bureau controlled table (F5). You may not add to, delete, or modify terms in this table.

Choose from the entries in the table as defined below:

Catalog - you have completed all fields for which there is information.

Minor Change - you have made minor changes, such as spelling corrections or location changes.

Recataloged - you have made substantial changes to the data, such as changes in date, classification, and object name.

Registration - you have completed only the registration screen and mandatory fields on the other 3 screens.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

The Notes field is a Memo field (F12 to expand). You may also want to enter notes on the cataloging activity at this time.

Refer to Section III of Chapter 3 for additional information on the Catalog Notes supplemental record.

E. Supplemental Records

1. *How do I complete the supplemental records that are associated with an archival/manuscript collection record?*

Refer to Chapter 3, Supplemental Records, for instructions on completing the supplemental records. Use these records to enter data on appraisals, component parts, images, preservation work, provenance, related databases, research notes, significance, and publication citations.

The program creates the supplemental records for catalog notes, condition reports, location, and object status when you save a record. See Section D above. The program will prompt you for information, such as the level of cataloging, or the reason for the location. When you complete the information, the program saves it as a supplemental record.

Note: The program creates the Object Status supplemental record, but the program does not prompt you for information to complete the record.

2. *What supplemental records are created automatically by the program?*

The program automatically creates supplemental records for deaccessions, exhibits, restrictions, loans in, loans out, inventory history and maintenance. Each of these supplemental records has a corresponding associated module. When you create a record in the associated module, such as an outgoing loan record, you can attach catalog records to it. The program will then automatically create supplemental records for each attached catalog record or in the case of the inventory history supplemental, when a catalog record is included in an inventory sample generated by the inventory module.

Refer to Chapter 4, Associated Modules, for instructions on completing records in the associated modules.

Refer to Appendix I: AIP for instructions on generating and completing an inventory.

3. *How do I know whether a supplemental record contains information?*

The supplemental records are located on the Supplemental Information tab on the Object Catalog Record. When you look at the list of supplemental records, a flag icon ⚑ marks the records that contain information.
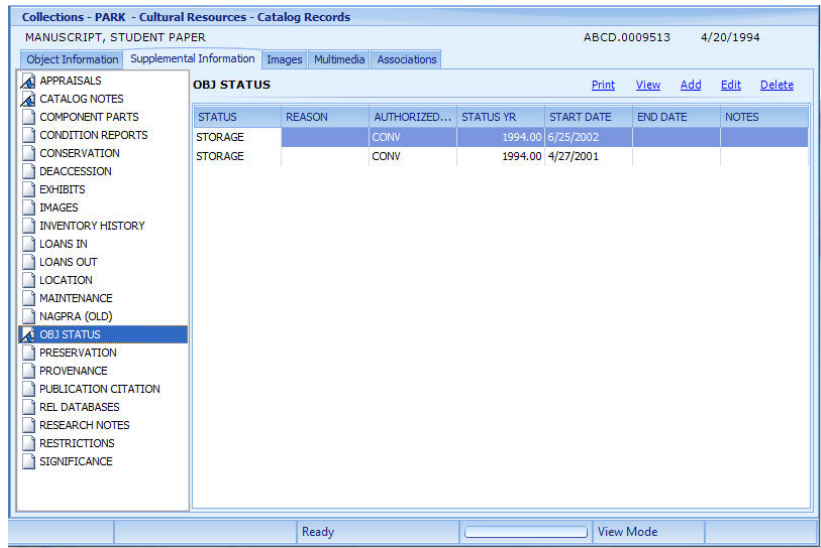
F. Printing the Record

Refer to Chapter 5, Printing and Reports, for additional information.

1. *How do I print a catalog record?*

NPS Form 10-254 (selected fields)
or
DOI CR Museum Catalog Record

There are three ways to print the information in a catalog record:

The NPS Form 10-254 or the DOI CR Museum Catalog Record both print on blank paper. (Note: The NPS Form 10-254 is the same as the preprinted Form 10-254.)

To access and print the NPS Form 10-254 or the DOI CR Museum Catalog Record, follow these steps in the View Mode:

- click on the Proficio Reports icon 📄 on the button bar, *or*

- go to Record on the menu bar and choose Reports from the pull-down menu. Select Proficio Reports from the submenu
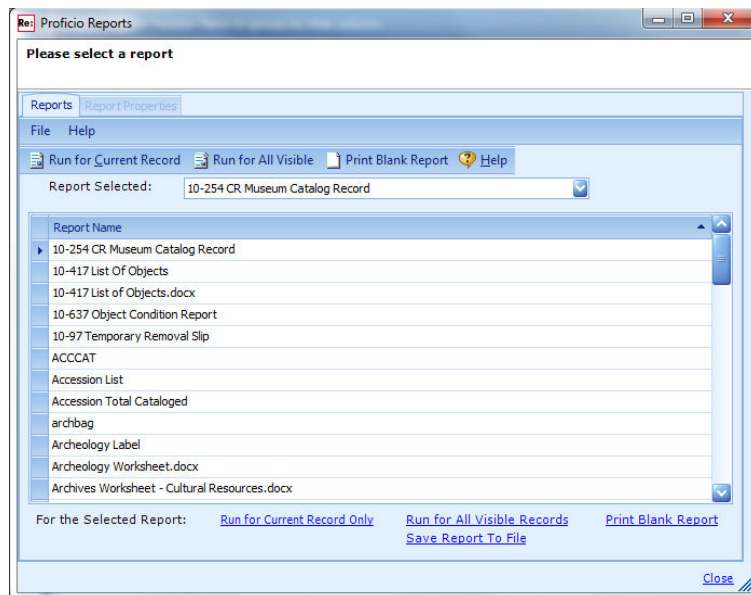
- select 10-254 Cr Museum Catalog Record or DOI CR Museum Catalog Record to print the cultural resources catalog record

- select <u>Run for Current Record Only</u> or <u>Run for All Visible Records</u>. You can print one record or a group of records. Refer to Chapter 7, Finding and Grouping Records, for creating groups of records.

- Click the Print button in the Preview window.

Full View

To print the record in Full View:

- click the Full View icon on the button bar,

- choose to print the Current Record or All Visible Records,

- select whether to Show Pictures, Show Supplementals and/or Show Blank Fields by checking the appropriate boxes,

- click Select,

- click the Print button in the Full View window.

2. *Must I print a catalog record?*

No. Printing catalog records at the unit is optional.

For NPS, you must submit electronic records on a fiscal year basis to the NPS National Catalog in Harpers Ferry, West Virginia. NPS National Catalog staff will print an archival copy of the 10-254 for storage there. Upon your request, the National Catalog staff will print paper copies of 10-254s for your park.