

Museum of Vertebrate Zoology Archives Processing Manual

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General Workplace Guidelines

In order to best preserve MVZ's archival materials, the following guidelines must be reviewed and followed by our staff.

- No gum, foods, or drinks are allowed when consulting or working with materials. Staff should wash their hands prior to using archival material.
- Staff members may only use pencils when taking notes. Pencils will be provided.
- Staff must wear provided gloves when handling photographic material.
- No marks, tracings, or notes may be taken on top of archival materials unless the archivist has approved annotations. No paperclips or post it notes may be used on the materials themselves. They may be used on folders and boxes during processing.
- Materials should be handled gently. They cannot be propped up or placed in one's lap.
- Cell phones must be set to silent or vibrate. Please try to refrain from excessive texting while working.

MVZ Archives System

The MVZ received a Hidden Collection CLIR grant to discover, catalog and make accessible its historical records. While our staff is focused on the goals outlined in the grant, we are also committed to creating an archival program that the museum can continue to maintain after the grant has expired.

Collections

The collections are arranged in the following manner:

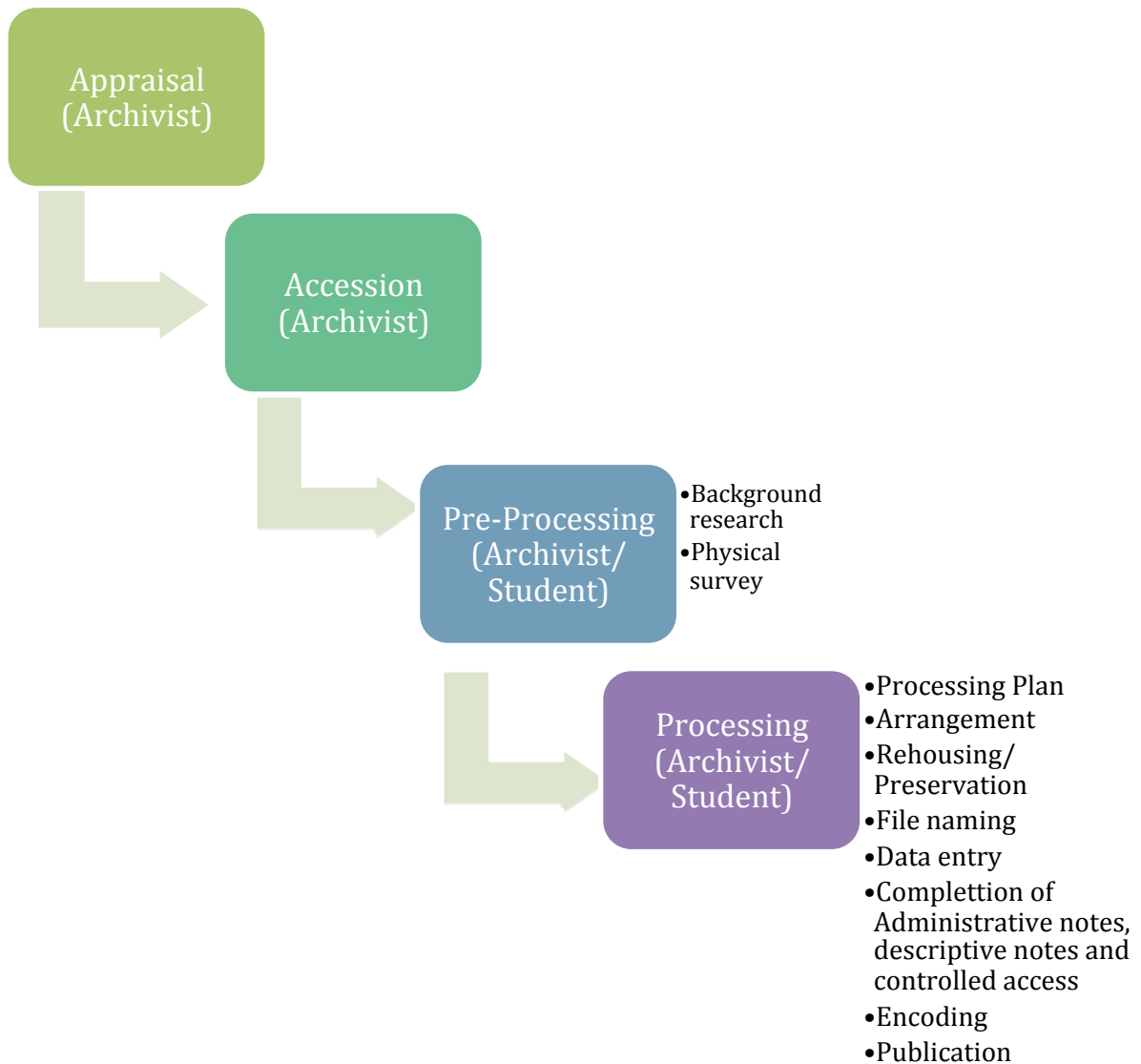
- Manuscript materials – These consist of the personal papers created by MVZ personnel.
- Archival records – These collections represent the administrative records of the MVZ including but not limited to operations, building/facilities maintenance, committees, and departments.
- Artificial collections – These are subject based collections coalesced over time by various contributors.
- Publications – The Archives maintains a complete set of museum reprints and other publications related to the museum, its personnel and its specimens.
- Pictorial collections – Art, photographs, negatives, film

Data management

The MVZ Archives uses Archivists' Toolkit (AT) to catalog and maintain its collections. EAD encoded XML files are produced for publication to the Online Archive of California (OAC). AT records are not available online. Discovery of materials by our patrons is made through the OAC. The OAC is the public interface.

The collection lifecycle

This chart describes the typical lifecycle of a collection and who completes the tasks.



Appraisal

The objective of appraisal is to determine the archival value of records in terms of the administrative, legal, fiscal, and historical worth. First, we assess the value of records and evaluate their existing arrangement and physical condition. Next, we make a decision about the disposition of the records. This will include a recommendation about what to retain and what resources we ought to commit to preserving the records and making them accessible. Appraisal is a fundamental process that influences all aspects

of the management of archives: retention and disposition, arrangement, preservation, and description. Appraisal is in fact a judgment; we allocate more resources to more important collections. Appraisal often happens at the time of processing, especially if the materials were accessioned prior to the 2012. No materials should be discarded without prior approval from the Archivist. The Archivist will discuss collections with you and share appraisal decisions that have led to processing priorities.

As you will come to know the collection better than anyone, your input and assistance is greatly appreciated in helping us determine how much time and how many resources to devote to the collections you process. Appraisal occurs throughout processing and in many ways, it never truly ends.

Accessions

The vast majority of the MVZ archival materials lack accession records. It can be difficult to determine provenance. However, all new collections have documented accession records and some background.

The archivist will communicate any known restrictions associated with a collection. As students begin processing materials, any highly sensitive materials should be brought to the attention of the archivist.

Preprocessing

Perhaps the most important steps in processing occur prior to actual arrangement. The extent of your preprocessing will determine the success of your finding aid. It gives you the background necessary to make sound judgments in all the steps that follow.

Background Research

To evaluate records, you will need to become familiar with the organization or individual(s) responsible for the creation of the materials. Read the creator's correspondence from the historical correspondence collection if available. Also, read biographies or obituaries for background information on the creators.

Physical Survey

Survey the entire collection to develop a grasp of its content, existing arrangement, and organization. Consider main subjects. Will researchers be able to use the material the way it is organized? Does organization vary by accession or box? Which order (chronological, alphabetical, or none) characterizes the bulk of materials? Are there any preservation issues?

Take concise notes as you conduct your survey but do not spend more than 15-20 minutes on a given box. Try not to list each item in a box or each folder. Your goal is to get a general sense the contents of the box.

Processing

The main steps in processing an archival collection is to appraise, preserve, arrange and describe materials. The key for processors is to balance the work necessary to make a collection available and usable. Different levels of processing are necessary for different types of collections.

“Intensive processing” is the Cadillac treatment, i.e. we pull out all the stops. Given the implied costs, this practice is no longer the norm in many cases. “Lite” processing has become a more useful standard because of its triage approach to arrangement, description, and preservation. “Lite” processing is grounded in the belief that all collections (and all parts of a given collection) do not *deserve* or *need* the same level of arrangement, description, and preservation attention. Almost all low research value collections and some high research value collections can be made accessible without arranging materials into multiple series, refolding, or removing duplicates. Part of the beauty of this practice is its reversibility. Should it come to our attention through patrons or reference services that a collection (or parts thereof) would benefit from additional arrangement, description, or preservation because it is more heavily researched than was anticipated, we can reprocess to meet revised collection needs. In short, “lite” processing eliminates a backlog of "hidden collections" in favor of providing broad, if not always deep, access to all of our collections in a timely fashion.

If you’d like to know more about “lite” processing, you should read the “More Product, Less Process: Revamping Traditional Archival Processing,” by Mark A. Greene and Dennis Meissner (it’s often simply referred to as “Meissner-Greene”). It was published in Vol. 68 (Fall/Winter 2005) of *The American Archivist*, pages 208-263.

Processing, A Step-by-Step Guide

After the survey, you will begin to organize the collection. This step-by-step guide is only a guide. You may prefer to complete these tasks in a different order.

1. Complete the Processing Plan

The processing plan helps you to outline and formalize your plans for the collection.

Please refer to Appendix 2: MVZ Archives Processing Plan Template on p. 17.

2. Decide the Arrangement

It’s best to try and maintain any original order when it exists. If original order is lacking, you might impose order to aid researchers.

The arrangement of a collection will be determined largely by the size and content of the collection. For example, the file folders in a small collection (two or three manuscript boxes) might be arranged alphabetically by subject. If a collection contains only one or two types of material, it might be preferable to arrange the collection into document types, such as correspondence, minutes, and financial records

chronologically. Field notes are typically arranged chronologically but there may be cases when they should be arranged around expeditions/collecting trips.

Collections are usually made more manageable by dividing the materials into series. For example, the papers of an individual might require a separate series for personal records, business records, and scientific work records. If a particular document type dominates the collection, the series could be formed around those record types, such as correspondence, financial records, field notes, minutes, manuscripts etc.

After the basic principles of original order have been taken into consideration, the primary objective of the archivist should be to arrange the material efficiently in the most researcher-friendly, preservation-minded manner possible.

Arrangement levels

The arrangement of a collection refers to the intellectual and or physical organization of the materials. Please read the handout on arrangement written by Gregory S. Hunter.

3. Rehouse materials

You will need to carefully consider the physical conditions of the materials in the collection. However, most materials will not warrant heavy preservation activities.

Some guidelines for light processing:

- Most materials should be rehoused in acid free folders
- Staples, pins, rubber bands and other fasteners should only be removed if they exhibit damage such as considerable rust.
- Place photographic materials in acid free envelopes.
- Use acid free paper to interleave highly acidic materials. This will prevent staining on adjacent materials.
- Fragile documents should be placed in polyester sleeves
- If time permits, newspapers should be photocopied to acid free paper. Large set of newspapers should be housed in acid free folders and not photocopied.
- If you encounter any conservation problems (i.e., mold, bugs, etc.) notify the archivist immediately. Do not continue processing until the archivist has been consulted

4. Label File folders

First things first, **please read Appendix 1, UNC's "How to proceed", on p. 12.**

Most processing will happen at the file level and so it is important to provide descriptive and yet succinct folder titles.

Some considerations (Borrowed from UCLA’s Center for Primary Research and Training: Student Processing Manual):

- If you are working with a collection that already has existing folder titles, use titles that reflect or duplicate the original title when appropriate.
- Capitalize the only the first letter of the first word and proper nouns.
- There are general conventions for describing materials in archival collections. For example, archivists generally use “correspondence” not “letters,” or “printed ephemera” or “distribution materials” not “handouts.” Again, looking at examples of other finding aids will be helpful in familiarizing yourself with standard language.
- If you are unsure about how to describe an item (e.g., “Is this a typescript, manuscript, or a script?” “Is it a flier or a booklet?”), refer to the Getty Research Institute’s Art and Architecture Thesaurus online at: <http://www.getty.edu/research/tools/vocabularies/aat/>. This is a thesaurus of cultural and material heritage concepts, and will help you decide how to best describe the item in hand.
- Only use the term “miscellaneous” to describe a folder of materials when absolutely necessary. Even a very general description is always preferable to “miscellaneous.” Miscellaneous materials are always filed at the end of a series or subseries.

The MVZ Archives follows a specific format for labeling folders:

Resource Identifier Resource Title	Series:subseries:folder title (date)	Box #/Folder #
---------------------------------------	--------------------------------------	----------------

Example:

MVZA.MSS.0140 Milton S. Ray Papers	Field notes: Bird notes (1902)	Box 1/Folder 2
---------------------------------------	--------------------------------	----------------

Folder titles should be written on the folder tab, with pencil and in your best handwriting. Temporary labels can be clipped to folders as they are being processed. Folder numbering should be the **last** step in physical processing.

Folders should be placed according to prescribed order and should fit snugly in their box. If materials are too loose in a box, papers will curl. If they are stuffed in a box, they can cause damage when trying to remove folders. They should fit snug.

5. Data Entry in Archivists' Toolkit

Now that the materials have been physically arranged and an intellectual arrangement has been outlined, it is time to input this data into the AT. **Please refer to Appendix 3: Entering Field Notes to AT on p. 21.**

6. Finding aid components

The finding aid isn't a straightforward writing tasks but rather a sum of your description, arrangement and the notes that help researchers navigate through the collection. Certain notes are necessary for a good finding aid and are required for publication to the OAC.

The front matter of the finding aid is organized in the following manner:

Descriptive Summary:

- Title
- Identifier
- Contributing Institution
- Language of materials
- Physical Description
- Date
- Creator

Administrative Information

- Conditions governing access
- Conditions governing use
- Preferred citation
- Biographical/historical note
- Scope and Contents note
- Arrangement note
- Abstract

Container List

Much of this information is preformatted in the AT. However, you will need to write the information listed in the Administrative Information. This is when DACS will be used most. It will guide you to formatting elements such as names and give you direction for writing various notes.

7. Finding Aid Data

This information will need to be entered at the collection level of the resource record.

EAD FA Unique Identifier – Enter the file name of the file. File naming convention for MVZ finding aids are as follows: Lastname_MSS#.xml. (i.e. Lynch_mss0002.xml).

Finding Aid Title – If the finding aid was made for field notes or the finding aid has no meaningful series, use the following title:

Inventory to the _____ of NAME at the Museum of Vertebrate Zoology at University of California, Berkeley.

If the finding aid is in fact a guide, with intellectual organization, use the following title:

Finding Aid to the NAME papers

If the finding aid is for Museum records, use the following:

Guide to the _____ at the Museum...

Finding Aid Filing Title: Should be formatted this way: Lynch (James F.) field notes

Date should be formatted this way: December 2012

8. Encoding

Once the data entry is complete and all of the finding aid elements have been entered in to the AT, you are now ready to export your finding aid into an XML document.

The AT exports and EAD encoded xml file that requires minimum processing before publishing to the OAC.

EAD – changes to the XML output from AT

These changes can be made in any text editor such as Dreamweaver or TextWrangler.

1. Capitalize the “c” in <origination label="creator">
2. <archdesc level="collection">

<did>

ADD→ <head>Descriptive Summary</head>

3. A <descgrp> needs to be added to the <archdesc>. After the origination element, you will see the end of the first descriptive unit (</did>). Add the <descgrp> and cut and paste elements to meet the following order as established by the Library of Congress:

</did>

ADD→ <descgrp>

ADD→ <head>Administrative Information</head>

The following elements should follow the Administrative label:

< accessrestrict>, <processinginfo>, <prefercite>, <userrestrict>

</descgrp>

<biohist>
<scopecontent>
<arrangement>
<controlaccess>

<dsc> will need a TYPE attribute. For more information, please visit the EAD tag library - <http://www.loc.gov/ead/tglib/elements/dsc.html>

4. Add a header for the container list. If you are publishing a finding aid for field notes and/or there is no arrangement of series, use the following header:

```
<dsc type="">  
  <head>Container List</head>
```

Note: other headers include, "List of items," "Collection Contents." Use "Collection Contents for fully processed collections containing series.

Appendix 1: From UNC's Style guide or "How to Proceed"

The following is heavily borrowed from UNC. It has slight changes reflecting MVZ Archives practices.

Saying It

Good writing and editing: Deathless prose is not required; good concise Standard English is required. Be prepared to have your finding aid edited by those who have been writing these things for a long time. Sometimes editing corrects errors; sometimes it clarifies description. Often editing serves to add words or phrases that appear in finding aids describing materials similar to those in your collection. Editors add these words or phrases to facilitate searching across finding aids.

Timeliness of description: It's tempting to say things like "Fluffy now lives in Cary, N.C., where she teaches obedience classes." Although additions or other circumstances will cause some finding aids to be revised in future, many finding aids will represent their collections for years and years. If your description includes statements that talk about what someone's doing now or where that someone currently lives or how many books she's written, you risk your description becoming quickly outdated. You can get around this by making the description more oblique and therefore more able to endure the test of time. Some examples are:

- *In 2001, Fluffy moved to Cary, N.C., where she taught obedience classes.*
- *As of 1969, she had written 18 novels about cane toads in Australia.*
- *The Hamptons had 24 children, 16 dogs, and 44 goldfish in 2001.*

Please remember you are describing a collection and not evaluating a collection. Please keep any opinions or judgments out of the finding aid – just the facts please.

Consistency: Please try to be consistent in what you call people, places, and things. If she's Mary Virginia del Rio, please don't call her Mary Va. del Rio. Ever. Think searchability.

Verb tenses: Use the present tense when referring to the papers themselves. Use the past tense when referring to actions of the creators or recipients of the papers.

- *There are three letters from John to Mary.*
- *In a letter of 3 June 1870, Amos described his trip to High Point, N.C.*

Say it and say it again: We don't expect people to read our finding aids from beginning to end. This is especially true of EAD-encoded finding aids, which are designed to help researchers navigate directly to descriptions of the materials of interest. Therefore, do not hesitate to repeat important information (e.g., complete names, full titles of writings, when an event took place) wherever needed. This can get tricky. Ask for help

if you are unsure about how much information to add at particular points.

BUT verbosity is discouraged: You're writing description, not deathless prose. Keep it simple both in sentence structure and vocabulary choice. Again, remember that researchers don't typically read through the whole finding aid beginning to end, but seek out the parts that hold particular interest for them.

Archives speak: Learn to speak like an archivist. Here are some handy phrases.

... appears to have been...

... may have been located...

... was possibly related to...

The relation between these materials and other materials in the collection is unclear.

Abstracts and Collection Overviews for Multi-Series Collections

Save writing the biographical note and scope and content notes till the end of the description process. Gather notes while arranging the collection but save this till the end because you will be really familiar with the collection at this point.

Biographical note v. Scope and Content (consult the DACS manual for various note descriptions)

The Biographical note is about the creator(s) of the materials. The Scope and Content is about the materials in the collection. It's sometimes difficult to separate what goes in one from what goes in the other. Try for as little overlap as possible. For example, if you're working on the papers of a creator who was involved in a particular project and the resulting materials are what are in the collection, talk about the creator's background in Biographical Note. You can also mention that the creator undertook the project at hand. But save the details of the project for Scope and Content. Here's a short example:

Biographical Note

Alma Ravenal was born in rural Georgia in 1831. Until the age of 25, she worked part-time as a missionary in China. After her return to the United States, she became a trapeze artist, traveling with various small circuses. During this period, she was involved in a project to memorialize great trapeze artists who were also missionaries. Ravenal died in 1876 as a result of a fall during a performance in DosiWallops, Wash.

Scope and Content

Collection Overview

The collection includes materials, 1870-1876, relating to missionary and trapeze artist Alma Ravenal's efforts to document the history of trapeze artists who were also missionaries. Correspondence, 1870-1876, is chiefly between Ravenal and friends and family members trying to convince her to give up her pursuit. Financial records

document expenditures for bail and other expenses Ravenal incurred as she became increasingly vehement in her pursuit. Photographs are largely etc., etc.

Folder Titles

Folder titles: Folder titles come in many shapes and sizes. In general:

- Do not end folder titles with a period.

Use colons to show subordination. Capitalize first word after colon.

- *Missionary Society: Committee on Part-time Missionaries (1890)*
- *Field notes: Bird notes (1906)*

Use commas before locations:

- *Missionary Society: Annual meeting, Raleigh (1902)*

Add this statement (or something close) just before the folder list begins when you are using folder titles as received:

- *Note that original file folder titles have, for the most part, been retained.*

HOWEVER, take that statement with a grain of salt:

Make the list as intelligible as you can without fretting over the contents of each folder. You may have to spell out abbreviations or take a quick look to see what some weird combination of letters and numbers means.

The creator may have been creative with names, punctuation, date style, etc., but you must strive for consistency. Making the creator's folder titles conform to our style is usually just a question of re-ordering the words. Do not hesitate to do this.

Folder list order when there is no original order: Folder order should have some kind of logic. Alphabetical or chronological order should be easily discerned. Any other order should make sense in terms of the papers. You are under no obligation to include an *arrangement* statement for each series or subseries. If there is no discernible order (especially in short folder lists), leave the *arrangement* statement out.

Alphabetical by name means last name, first name.

- Bunnell, Sterling

Company names that include a person's name are alphabetized by the first letter of the first word in the name.

- J. M. Dent and Sons

Names: Personal and Corporate Consistency: Try to be consistent in how you write names. It is often best to use the fullest version of the name first in each section of your

finding aid (e.g., abstracts, biographical/historical note, collection overview, series descriptions). In subsequent references within each section, you may use either the last name alone (unless this makes for unclear references) or the most-used combination of given and surname. If the appropriate name is *Rollo Howard Beck*, you may refer to him as *Beck* or *Rollo Howard Beck* or perhaps *Rollo Beck*. Do not, however, arbitrarily start calling him *Rollo H. Beck* or *R. Howard Beck* or *Rollo* (unless he went by *Rollo*, in which case, use that name consistently).

Initials: Always add a space between initials in names with multiple initials:

- *R. •P. Holdzkom*
- *J. •D. Sallinger*

Abbreviations: Usually spell out names of corporate bodies. There can be exceptions, but this will be determined on a case-by-case basis, often according to whether or not there is an authority record for a name.

- *Museum of Vertebrate Zoology*
- *Belvedere Steele Company*

Names: Places

Abbreviations: Always use the approved Library of Congress state abbreviations when the state is a modifier. Note that these are NOT the 2-letter standard United States Post Office abbreviations.

- *Chapel Hill, N.C.*
- *Little Rock, Ark.*

Places as part of name: Always spell out state names when they are part of a name. This also goes for *United States*.

- *North Carolina Center for Public Policy Research*
- *West Virginia Prison for Women*
- *United States Senate.*

Stand-alones: Always spell out state names when they stand alone. This also goes for *United States*.

- *She is a native of California.*
- *They came to the United States in 1856.*

Spaces

One space rules: Always use ONE space after punctuation (periods, colons, whatever).
In an EAD finding aid, there is never a time that you need more than one space in a row.

Dashes should not be surrounded by spaces:

- 1983-1984

Miscellaneous

Chair and chairman: If we agree to use *chair* for both males and females, we cannot go wrong.

Correspondence: *Correspondence* means an exchange of letters. If we say, *Also included is correspondence between Amos Trevellyan and his daughter Alma*, we mean that there are letters from Amos to Alma as AND letters from Alma to Amos. Do not *use correspondence* when there are letters going only one way. If the collection includes chiefly incoming letters and only a few outgoing letters, which may or may not be paired together, *correspondence* is still the correct term.

X *Included is correspondence Rankin received from supporters.*

- *Included are letters Rankin received from supporters.*

Copies: Be precise and clear when referring to copies as opposed to *original* items. Acceptable terms include *typed transcriptions*, *carbon copies*, *photocopies*, *photocopies of typed transcriptions*, and *handwritten copies*. Avoid vague terms (e.g., *copies*).

Uploading/Testing on OAC Guide

ON MAC OS X

1. Launch Finder
2. From the "Go" menu, select "Connect to server...".
3. Enter your complete (i.e., include "https") voroEAD Production Directory URL.
4. Enter your voroEAD user name and password for authentication and click "OK".

Upload newly created XML files that you want to test here.

Appendix 2: Museum of Vertebrate Zoology Archives Processing Plan Template

Adopted from the UCLA Library special Collections CPRT training material.

Processor Name:

Date:

Before you begin processing a collection, you will create a processing plan that will help you to clearly lay out your plans for the collection's arrangement and description. This work plan can be completed during the initial research and survey phase of processing, and can be thought of as iterative. Things like the series arrangement or collection dates may change during processing. However, any substantial changes made to the work plan should be discussed with the Archivist first.

PLEASE DELETE THE INFORMATION IN BRACKETS AFTER YOU'VE COMPLETED THE TEMPLATE!

COLLECTION OVERVIEW

Collection Number: [Find in the collection file or get from the Archivist]

Creator(s): [Name of person or organization responsible for the creation, accumulation, or assembly of the described materials]

Title: [Collection Title, e.g. Joseph Grinnell papers, MVZ Operation records]

Date span: [Estimate date span of collection in years]

Extent: [list number of boxes in the collection and what type of box, e.g., 36 record cartons, 15 document boxes, 33 shoe boxes]

Acquisition information: [Provide any information on donor or how collection was acquired]

Brief description of collection: [One or two sentences about creator and types of records]

Potential research value: [Is it High, Medium, or Low?]

Reason? [Base your reasoning on uniqueness of material, dates of collection, significance of creator, historical value, etc. Use your best judgment and try to be objective!]

ARRANGEMENT

Proposed level of arrangement and description: [Choose *collection level, box level, folder level, or item level*. Hint: this will almost always be folder level unless there are field notes]

Proposed arrangement plan: [List the proposed series (and subseries if necessary), the number of boxes that fit each series, and how that series will be arranged. If series aren't necessary, please explain why. Remember, to keep it simple and easy to follow!]

Example:

Series 1: Correspondence (10 boxes, alphabetical by correspondent)

Series 2: Public Relations (7 boxes, chronological by date)

Subseries 2.1: Anniversary Galas

Subseries 2.2: Press Releases

Reason for proposed arrangement: [Write a sentence or two on the overall arrangement scheme and why this arrangement is appropriate for the collection. Please note if original order exists. How does that factor into your arrangement scheme? Also note if you are reprocessing an already processed collection or processing an addition.]

PROCESSING CONSIDERATIONS

Weeding and Appraisal:

[Indicate if portions of the collection are candidates for weeding (extensive duplicates, tax documents, receipts, etc) or for separation (materials that are out of the scope of the collection). Make sure to note the boxes where they are located in your survey inventory!]

Is there any material in the collection that should potentially be restricted due to privacy issues? If so, please indicate: [This may include personnel records, SS#s, medical records, etc.]

Which of the following actions is necessary for preservation purposes during processing?

[Choose from list and delete the rest]

Reboxing

Folding loose material or refolding

Flattening rolled or curled items

Hardware removal such as rusty fasteners

Removal from binders or loose leaf notebooks

Oversize materials or odd size items that need special housing: (list here)

Sleeving photographs in protective casing

Other preservation issues such as mold, red rot, excessive dirt or dust: (list here)

Estimation of supplies needed:

[Choose from list and delete the rest]

Boxes (letter or legal) and amount needed:

Amount of folders needed (~25 per box):

Envelopes for photographs

Slide sleeves/boxes

Plasti-clips

Other:

A note about field notes

Many MVZ collections consist only of field notes. Sometimes there are field notes bound in the standard MVZ blue buckram. These field notes were originally taken in binders and later bound. These are commonly referred to as "Standard field notes." Some field notes predate the MVZ, or were taken by non-MVZ personnel, or were simply taken in bound notebooks. These field notes are referred to as "Non-standard field notes." To make things more problematic, many authors have both "standard" and "non standard" field notes. This will need to be reflected in the finding aid through appropriate series.

MVZ standard field notes and non standard

A checklist:

Are there field notes?

Are they bound "standard" field notes?

Are there also "non standard" field notes?

If you answered yes to all of these questions, you will need a series titled

MVZ standard binding" AND

MVZ non-standard binding

Note that only MVZ is capitalized.

MVZ standard field notes should always go first.

If there are many series within the collection, the two can be a subseries to a larger series title "Field notes"

If there is only one type of field notes (either one or the other) than it may not be necessary to create the series. It depends on if there are other materials.

The scope and content note should make this distinction very clear.

Appendix 3: Entering Field Notes to AT

There are a few resources that you will use when processing field notes:

1. The original field notes
2. Arctos (MVZ specimen database)
3. The BSCIT site: [BSCIT](#) is an online database of our field notes. Anyone can access our digitized field notes from this site. This site was created from an earlier scanning grant.

All field notes, at the section level, should reference both sites when applicable.

Login credentials

Username: Volunteer

Password: MVZarchives

Creating a New Resource

1. Once logged into Archivists' Toolkit, double click on the Resources module in the left hand menu. This will open up the list of collections.
2. Click on New Record on the top menu of icon buttons.

Resource data entry

The following are the mandatory data entries which must be specified in the Resource record entry screen:

1. Level: Collection
2. Title: Collection title.
3. Date Expression: Year-Year
4. Inclusive dates: Begin and End years
5. Language – English (eng)
6. Resource Identifier: This number is chronological when possible. The first section will always be "MVZA". The second session will usually be "MSS" and the third section is the next sequential number. It should be four digits. The fourth section should be left blank. The archivist will assign the resource identifier.
7. Extent: Enter the number of volumes in the extent number from the dropdown.
8. Any notes you want to make about a collection should be made under Repository Processing Note.
9. Hit Save and then Close.

Resources Record 13 of 143

Title: Anderson H.T. field notes Resource Identifier: MVZA.MSS.0012

MVZA.MSS.0012: Anderson H.T. field notes

Basic Description | Names & Subjects | Notes Etc. & Deaccessions | Finding Aid Data

Level: collection ← No. 1

Other Level:

Title: Anderson H.T. field notes ← No. 2

Wrap in tag...

Date Expression: 1932 ← No. 3

Inclusive Dates: Begin 1932 End 1932 ← No. 4

Bulk Dates: Begin End

Language: English (eng) ← No. 5

Repository Processing Note:

Repository MVZ:

Change Repository

Resource Identifier: MVZA MSS 0012 ← No. 6

Accessions linked to this Resource ID:

Accession Number ▲	Accession Title

Extent: Extent Number 1 Volumes ← No. 7

Container Summary:

Instances:

Instance Type ▲	Instance Label
	No. 8

Add Instance Remove Instance

Restrictions Apply

Add Child Add Sibling Rapid Data Entry Delete Component Transfer Manage Locations Export EAD Export MARC Export Cont. Labels

First Previous Next Last Reports Close Save

Field notes

Entering Volumes and Sections for MVZ standard field notes

Once the collection has been entered, the volumes and sections hierarchy should be entered as well.

Add a Volume

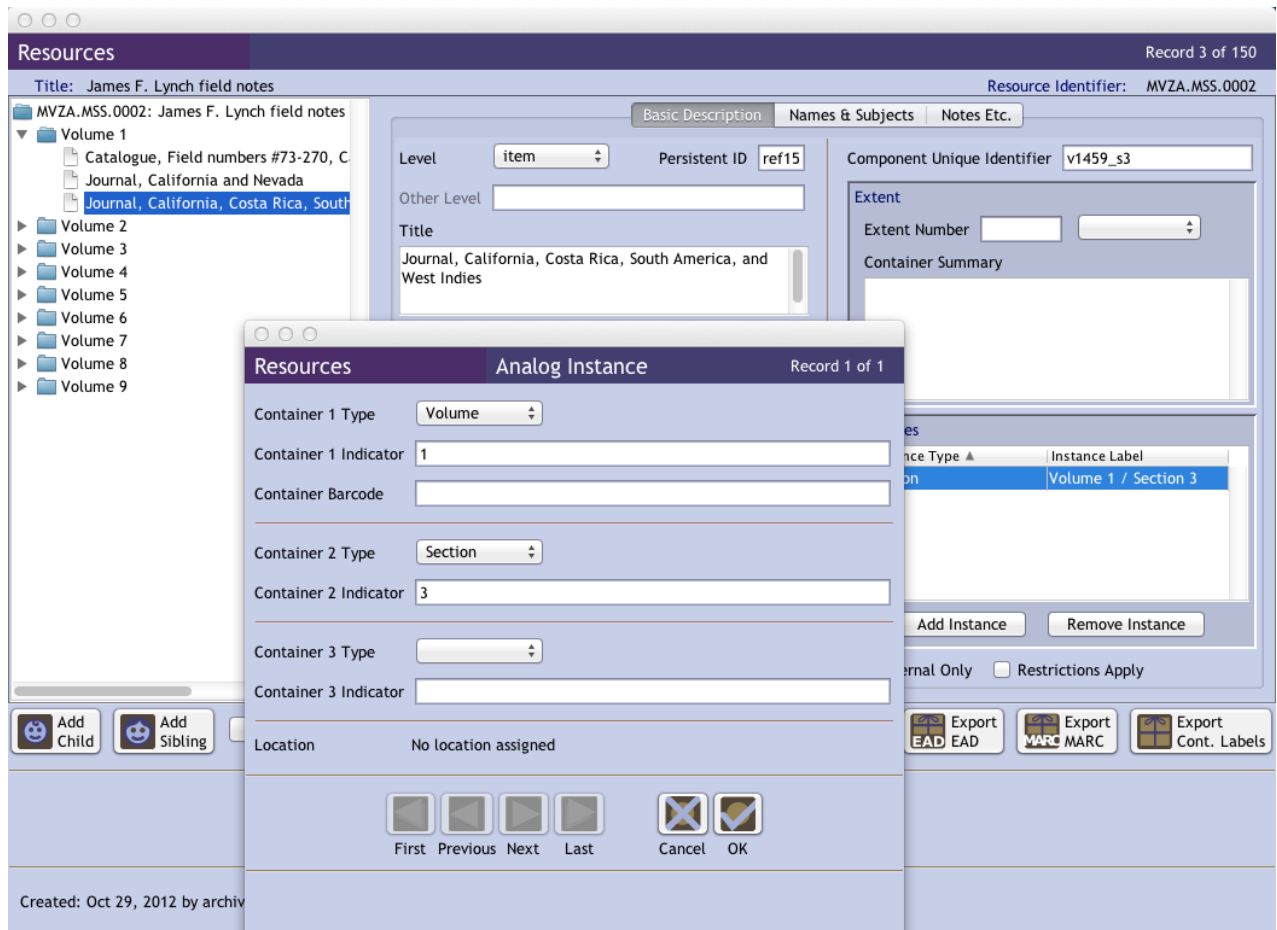
1. Once in the collection record, click on the Add Child button.
2. Level: Choose File
3. Title: Enter the volume number (Volume 1)
4. Enter the span of years of the volumes in the Date Expression (i.e. 1955-1956).
NOTE – If the volume has only two years, and there is a gap, it should be put in

- separately – i.e. 1968 and 1972 as opposed to 1968-1972. They mean two different things. If the volume has three years, you can put in as a range (i.e. 1968-1981).
5. Enter the Dates in the Date Begin and Date End.
 6. Do not enter the Bulk Date.
 7. Look on the field note spreadsheet to see if the volume has a unique identifier. This would be listed in Volume ID column (column A) of the spreadsheet. If there is no volume ID, leave the field blank for now.
 8. Click the Add Instance button and choose Mixed Materials from the Instance dropdown. Hit OK.
 9. Choose Volume from the Container 1 Type dropdown
 10. Enter 1 in the Container 1 Indicator and hit OK (Continue to enter subsequent volumes in chronological order, so the next volume will be volume 2, etc.)

Add a Section

The sections are clearly marked with blue dividers in the field notes themselves. You may use the physical field notebook to enter section. Sections are also listed on the BSCIT site but if there are any discrepancies, the original field notes are the authority:

1. From the Volume level, add a Child
2. Under Level, choose item from the dropdown
3. In the Title, enter the Section Title as it is written on the blue place card **but do not abbreviate names.**
4. Enter the date expression (see number 4 in the volume section for detailed directions).
5. Enter the Dates in the Date Begin and Date End.
6. Do not enter the Bulk Date.
7. Look on the field note spreadsheet to see if the volume has a unique identifier. If so, the sections should be numbered sequentially. If the Volume ID is 1459 then the first section will be v1459_s1. The next section will be v1459_2. Please reference the BSCIT site if you aren't sure.
<http://bscit.berkeley.edu/mvz/volumes.html>



8. Click the Add Instance button and choose Mixed Materials from the Instance dropdown. Hit OK.
9. Choose Volume from the Container 1 Type dropdown
10. Enter the appropriate volume number in the Container 1 Indicator and hit OK.
11. Enter Section in the Container 2 Type dropdown.
12. Enter the appropriate Section number in the Container 2 Indicator field.

Using Arctos to find geographic location

Arctos is the name authority for geographic location names. The higher geography of the localities named in the field notes are cataloged in Archivists' Toolkit. If a researcher visited Yosemite Valley in Volume 4 Section 2, Section 2 will have a catalog entry of North America, United States, California, Mariposa County. The name and format of the catalog entry is pulled from Arctos.

The following instructions outline how to navigate Arctos for this purpose. Many institutions use Arctos therefore you should narrow it down so that you only search MVZ materials. The instructions walk you through this process.

1. Navigate to [Arctos](#)
2. Click on the Portals button
3. Select MVZ from the list on the left.
4. Find the MVZ Collections Portal row and click on Search Specimens
5. Enter the collector's last name in the Collector field
6. In the section for Date/Collector, you will see a small link called Show More Options



The screenshot shows a search interface for 'Date/Collector'. It includes a 'Help' link, a 'Collector' dropdown menu, and a text input field with the name 'Swarth'. A red arrow points to the 'Show More Options' link on the right side of the interface.

7. Now you can enter a date range (you can just use years)
8. You can enter the locality but sometimes it easier if you don't. It depends on how the data were entered.
9. Hit search.
10. You can customize the search results so that they make sense to you. Some people click on the Add/Remove button and go hog wild. Get to know this screen and try out a few variations to get it to fit your needs.
 - a. Note: You can easily search for a specific specimen cataloged in the field notes. The number in the field notes is referred to as the Collector Number. If the specimen is in Arctos, it will give you a 1 to 1 match for the location. Names, dates, localities, and collector numbers are all data which you can use to track down the higher geography of the field notes.
11. Now you can look for a specimen collected on or around the date specified in the field notes. Click on any specimen number that corresponds directly with the field notes.

Picoides villosus orius

Animalia Chordata Aves Piciformes Picidae Picinae *Picoides villosus orius*
Identified by Museum of Vertebrate Zoology, University of California, Berkeley on 1999-01-27
Nature of ID: legacy

Identifiers
collector number: 3011

Details

Part Name	Condition	#	Remarks
study skin	unchecked	1	

Determination Type: accepted place of collection

assigned by Tale S. Tunstall on 2000-03-17

Higher Geography: North America, United States, California, Mariposa County

Verbatim Locality: Yosemite Valley

Specific Locality: Yosemite Valley, Yosemite National Park

Locality Remarks: Checked by JLPatton (15 Jul 2008)

Collecting Source: wild caught

Event Date: 22 Dec 1914

Verification Status: verified by curator

Event Coordinates: 37.736686/-119.598212

Datum: North American Datum
1927

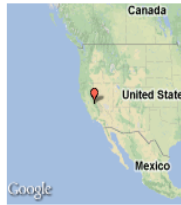
Original Coordinate
Format: decimal degrees

Elevation 4030 to 4030 ft

Error: 4 mi

Georeference Source: TopoScout 2.04 USGS
1:100000

Georeference Protocol: not recorded



sex: female

Museum of Vertebrate Zoology, University of California, Berkeley, 2005-11-01

weight: 60.30 g

Museum of Vertebrate Zoology, University of California, Berkeley, 2005-11-01

age: u ad.

Museum of Vertebrate Zoology, University of California, Berkeley, 2006-05-23

Accession

853

Usage

Contributed By Project: [Historic Grinnell Survey: Yosemite Transect](#)

Collectors

Joseph Grinnell

Entering Geographic Locations into Archivists' Toolkit

The geographic data is entered at the Section level. Make sure you are in the right section before entering data.

1. In the original field notes, you should see some kind of locality data for the collecting events as the header of the page. Use this information to search in Arctos. Search using the name of the Collector, the date and the locality. This will give you entries with the higher geography spelled out. Or you can simply
2. In Archivists' Toolkit, from the section entry screen, above the Persistent ID, you'll see a button for Names and Subject. Click on this button.
3. Click on Add Subject Link
4. Find the appropriate Geographic Name and click on the Link button
5. If the desired Geographic Name is not already listed, you will need to add it by clicking on the Create Subject Link.
6. Copy the higher geography from Arctos and paste it into the Subject Term field in Archivists' Toolkit.
7. Choose Geographic Name (651) from the Type dropdown.
8. Choose Arctos from the Source dropdown.
9. Click OK

Subjects Record 15 of 117

Subject Term:

Type:

Source:

Scope Note:

Referencing scanned field notes

Many field notes have been scanned and the finding aid should point users to those scans online. There are a couple of ways of doing this. The first step is to visit the [MVZ BSCIT site](#) and see if the field notes have been scanned.

Field notes scanned

Follow these instructions if the field notes have been scanned. NOTE: All ampersands need to be changed from & to &

1. After the finding aid has been completed, you will need to add a line of code to connect users to the scans of the individual sections.
2. Under each section paste the following:

```
<dao ns2:role="http://oac.cdlib.org/arcrole/link/" ns2:href="URL of Section"
ns2:title="Online items">
  <daodesc>
    <p>View digitized field notes.</p>
  </daodesc>
</dao>
```

Each href should point to the beginning of the section.

Identifying related specimen accessions

As part of the finding aid process, the MVZ correlates specimen data from the field notes to the specimen database. This information is specified in the related materials note.

1. In AT, create a related archival materials note within the section for which there are related specimens.
2. Title the note, "Related materials"
3. You can use the following:

Specimens collected in this section include accessions #XX and #XX. These specimens can be found in `<extref actuate="onRequest" href="ENTER URL FOR ARCTOS SEARCH" show="new" title="Arctos">Arctos</extref>`, the Museum of Vertebrate Zoology's specimen database.

You will need to search Arctos for the specimens referenced in the volume. If the field note catalog dates from a certain time period, it may be best to narrow your search parameters to the dates and author of the section. The URLs are persistent enough to be used in finding aids.