



Type of document

Manual

Control number

MNL-4

Date

October 6, 2017

Document status

In progress

Version

v4.0

Comments

New sections will be added as they are completed

SFU ARCHIVES

ARCHIVES INFORMATION SYSTEM (AIS)

AIS4 USER MANUAL



AIS4 USER MANUAL – CONTENTS

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TAB 1
AIS4 GENERAL FEATURES

1.1 COMMON SCREENS and LAYOUT FEATURES

Status Final (v1.0)

Last updated November 16, 2017

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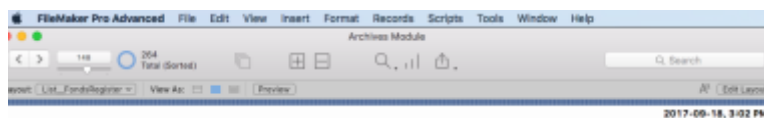
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1. OVERVIEW

- 1.1. This guideline provides guidance to common screens and layout features that users will encounter in AIS4.
- 1.2. The main screen types are:
 - [Home screens](#)
 - [Record View screens](#)
 - [List View screens](#)
 - [Data Entry screens](#)
 - [Popover windows](#)
 - [Developer screens](#)
- 1.3. For search screens, see section 1.2 in this Manual (*AIS4 General Features > Search*).
- 1.4. For reports, see section 1.3 in this Manual (*AIS4 General Features > Reports, Actions, Statistics*).

2. NAVIGATION

- 2.1. FileMaker software includes generic features to support navigation in and between database records and tables.
- 2.2. The ribbon that runs across the top of the FileMaker window (*FM Status toolbar*) contains a number of buttons and navigation aids.
 - For some types of screen (e.g. **Data Entry** screens), the *FM Status toolbar* is deliberately hidden.
 - Users can toggle the toolbar hidden / unhidden (using the FileMaker View menu).
 - Users can also customize the buttons that appear in the toolbar on their desktop FileMaker client.



- 2.3. **Wherever possible always use AIS navigation buttons instead of the generic FileMaker Status toolbar button. The AIS buttons trigger scripts that are needed for behind the scenes operations.**
 - For example, click DONE buttons to close windows rather than use the Mac OS "red dot" button in the upper left corner of a FileMaker window.
 - AIS buttons typically (but not always) display a tooltip (text that appears when you hover your cursor over an object) that explains the purpose of the button; tooltips have not yet been fully implemented everywhere in the system.

2.4 For purposes of the AIS, the most useful feature of the *Status Toolbar* are those on the left-hand side that support navigation.

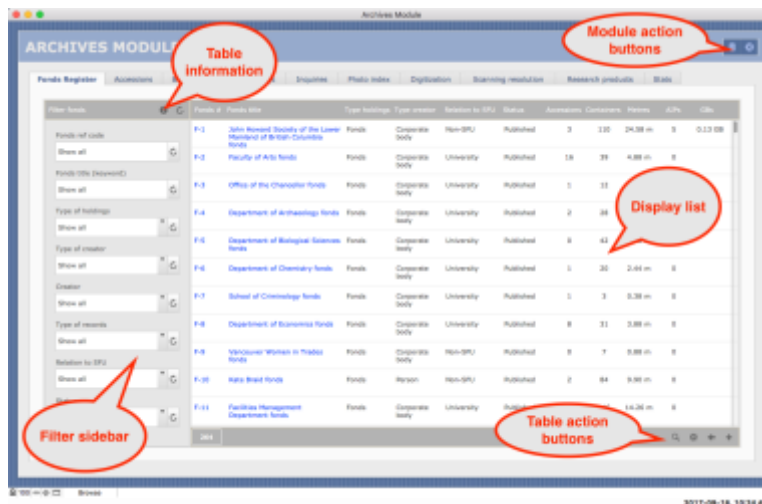
- The number above the slider tells you the current record number.
- The number to the right of the slider tells you the total number of records in the current set.
- The slider and the forward / back arrows beside it to the left can be used to navigate to records within the current set.

3. HOME SCREENS

3.0.1 There are six modules in AIS4: one for each program area (Archives, Records Management, FIPPA), and three others that share data across or support those program areas (Authority Control, Repository Management, and Office Administration).

3.0.2 Each AIS4 module has a **Home** screen that presents the primary entities tracked by it.

- The **Home** screen is the default landing page when you open a module.
- Each tab on the **Home** screen typically corresponds to one entity tracked by the system.
- To navigate to the **Home** screen, click the HOME icon in the NAVIGATION BUTTONS BAR in the upper right area of a **Record View** or **List View** screen.



3.0.3 The remainder of this section provides a description of the main features of a typical **Home** screen.

3.1 Display list

3.1.1 The *Display list* takes up the bulk of the **Home** screen and shows records from the database table corresponding to the entity represented by the tab.

- The example above shows all Fonds / Collection records from the Fonds Register table.
- Blue text represent a link; click to navigate to the full record on the **Record View** screen.
- The number field on the left-hand side of the lower bar beneath the *Display list* gives the total number of records displayed.

- Depending on the tab, there may be other fields returning information about the set of displayed record (e.g. total time spent, total size).

3.1.2 Note that you **cannot** sort entries in the *Display list* on the **Home** screen.

- To sort, click the Get All button (arrow icon) below the list to get all displayed records on the **List View** screen and use the sort features there.
- For the Get All button, see the section below on [Table action buttons](#).

3.2 Filter sidebar

3.2.1 The *Filter sidebar* appears along the left side of the screen. It contains filter fields that allow you to narrow the list of records returned in the *Display list*.

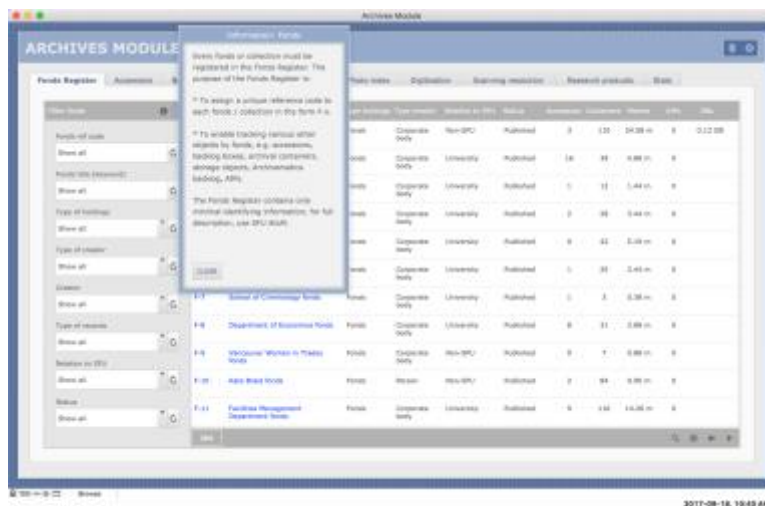
- By default, fields are set to "Show all" – meaning all records in the table are displayed.
- Click the Refresh button (circular arrow icon) next to a field to reset it to "Show all."
- Click the Refresh button (circular arrow icon) in the sidebar header to reset all fields to "Show all."

3.2.2 **Note that when you navigate between tabs, the values in filter fields may be skewed so that the *Display list* appears empty.**

- In FileMaker terms, the same "global" fields are used on the various tabs and the same values will "stick" when you switch from one tab to another.
- Click the REFRESH button (circular arrow icon) to restore the *Display list* on the new tab.

3.3 Table information

3.3.1 The AIS provides a brief description of the table corresponding to a tab in terms of its purpose and structure; to access, click the INFORMATION ICON ⓘ in the *Filter sidebar*.



- The AIS opens a popover window to show the table information.
- If a related detailed user guideline or data dictionary entry for the entity is available, the popover window will include a download link for the pdf of that section.

- See the section 7 below [for more on popover windows](#).

3.4 Table action buttons

3.4.1 A set of four *Table action buttons* appears in the bar below the *Display list*, on the right-hand side.

3.4.2 QUICK SEARCH *button (magnifying glass icon)*

- Click to open a popover windows allowing you to search across all records in the table.
- For more information on Quick Search, see section 1.2 in this manual, *AIS4 General Features > Search*.

3.4.3 ACTIONS *button (gear icon)*

- Click to open a popover window allowing you to select / run a standard report or action relating to the table (e.g. import records, perform common searches, output standard reports).
- For more information on reporting, see section 1.3 in this manual, *AIS4 General Features > Reports, Actions, Statistics*.

3.4.4 GET ALL *button (arrow icon)*

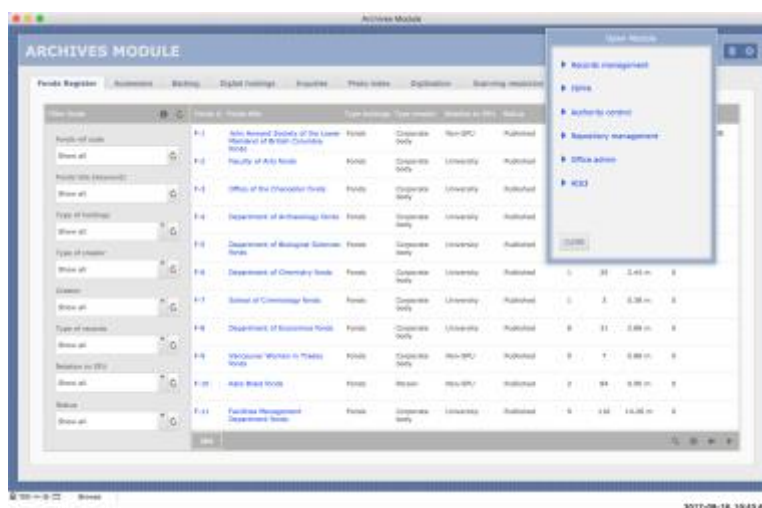
- Click to get all records currently shown in the *Display list* on the table's **List View** screen.

3.4.5 NEW RECORD *button (+ icon)*

- Create a new record in the table.
- AIS will typically route you the **Data Entry** screen for that table.

3.5 Module action buttons

3.5.1 A set of two *Module action buttons* appears in the upper right section of the **Home** screen window.



3.5.2 OPEN OTHER MODULE *button (database icon)*

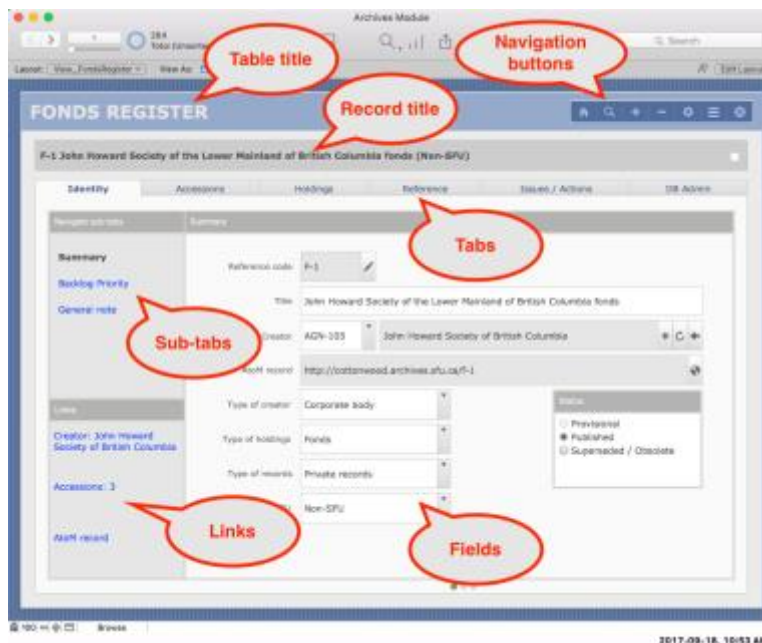
- Click to open a popover window allowing you to navigate to / open a different AIS4 module or the AIS3 Home screen.

3.5.3 CLOSE FILE *button (x icon)*

- Click to close the current file and any open windows associated with it.

4. RECORD VIEW SCREENS

4.0.1 A **Record View** screen presents the full detail of a single record for viewing / editing.



4.1 Table name

4.1.1 The name of the database table appears in the upper left side of the screen.

- The table name generally corresponds to an entity that is tracked by the system.

4.2 Record title

4.2.1 The title of the current record is shown beneath the *Table title* in a grey box.

- The *Record title* typically combines data from various fields that can be edited in the [Fields area](#) under tabs / sub-tabs.

4.2.2 Note that there is check box on the right-hand side of the *Record title* box.

- Toggle the check box to mark / unmark records.
- For more information on marking records, see section 1.2 in the Manual, *AIS4 General Features > Search*.

4.3 Tabs and sub-tabs

- 4.3.1 Information in the record is stored in fields organized into primary tabs and secondary sub-tabs.
- 4.3.2 The primary tabs appear along the top of the record, below the *Record title*.
- The current tab is fore-grounded.
- 4.3.3 Secondary sub-tabs appear in the sidebar on the left side of the record in a box labelled "Navigate sub-tabs".
- Sub-tab links are given as blue text.
 - The current sub-tab text is bolded black.
 - The name of the current sub-tab will also appear in the grey header box above the *Fields area*.
- 4.3.4 **Note that not all tabs have sub-tabs.**
- If there are no sub-tabs, the sidebar will typically contain some explanatory text describing the purpose of the fields in the current tab.
- 4.3.5 Two standard tabs are common in most tables:
- The first tab is typically named **Identity** and contains fields that summarize the record.
 - The last tab is typically named **DB Admin** and contains calculation and control fields for troubleshooting purposes; see the sub-section below [for more information on the DB Admin tab](#).

4.4 Links

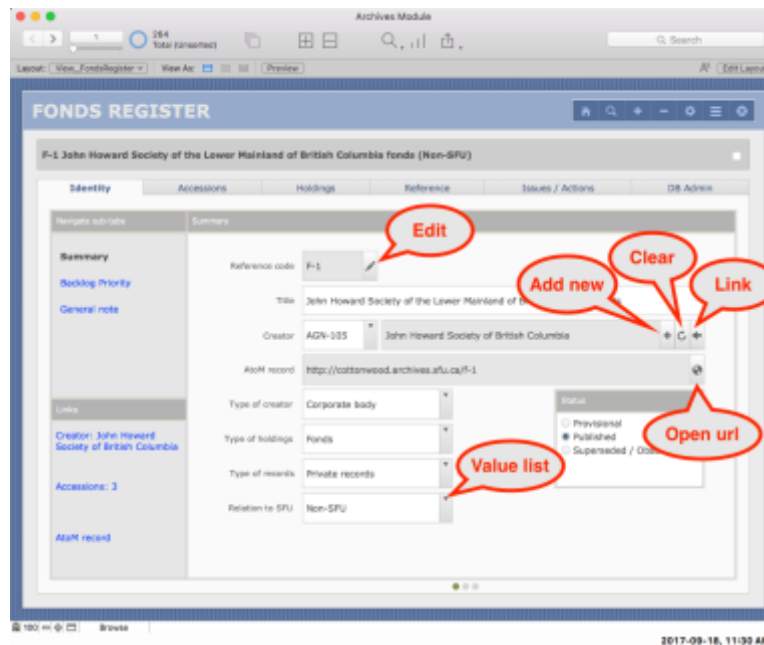
- 4.4.1 The **Identity** tab in most tables typically includes a *Links* box in the sidebar on the left-hand side of the screen.
- These are links to related records in other tables.
 - Click a link to navigate to the record(s) on their respective **Record** or **List View** screen.

4.5 Fields area

- 4.5.1 The bulk of the screen is taken up with the *Fields area* which provides access to the data fields under a given tab / sub-tab.
- White fields can be directly edited.
 - Shaded fields cannot be directly edited; they typically display data returned from calculations or related records.
- 4.5.2 The **Identity** tab often contains a distinctive *Status* field where you can view / update the status of a record.

4.6 Field action buttons

- 4.6.1 Icons appear beside some fields indicating actions are available relating to that field. Some but not all are illustrated in the diagram below.



4.6.2 VALUE LIST *button (triangle icon)*

- Click to select field value from a list of controlled terms.
- In some cases ("drop-down list"), terms are optional – you can enter a different value or overwrite a selected term.
- In other cases ("pop-up menu"), terms are mandatory – you can only select from the predefined list of terms.
- You cannot tell visually whether the field is governed by a drop-down list (optional terms) or pop-up menu (mandatory terms): if you can place your cursor in the field and begin editing, it is a drop-down list; if not, it is a pop-up menu.

4.6.3 CALENDAR ICON *date field [not illustrated]*

- Enter the date directly or click to use the calendar interface to select a date.

4.6.4 EDIT *button (pencil icon)*

- Appears next to some (but not all) shaded fields.
- Click to navigate to the tab / sub-tab or some other interface (e.g. a popover window) that allows you to directly edit the data.

4.6.5 CLEAR *button (circular arrow icon)*

- Clear field contents (sets to blank).
- Typically used when you cannot manually overwrite or clear selections from pop-up menu value list.

4.6.6 ADD NEW *button (+ icon)*

- Create a new related record.

- Typically used when selecting the ID of a record from a value list generated from another table (e.g. a list of Agents).
- AIS will route you to the **Data Entry** screen for that table or to some other interface (e.g. a popover window) that allows you to create the new record.
- Typically when you close the **Data Entry** screen, the selection field will be populated with the ID of the new record you just created.

4.6.7 LINK *button (arrow icon)*

- Navigate to a related record in an different table.
- AIS will route you to the record on the Record View.

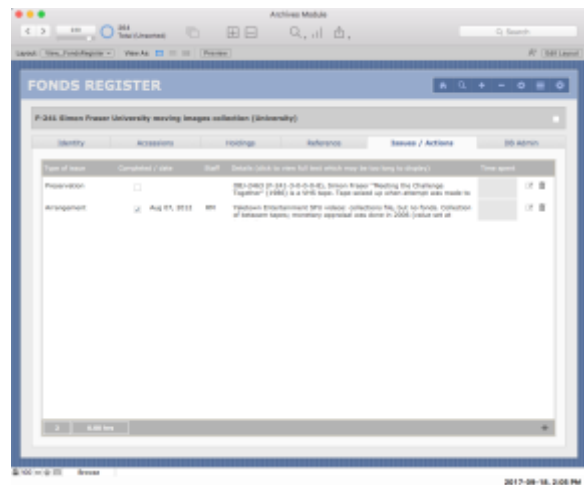
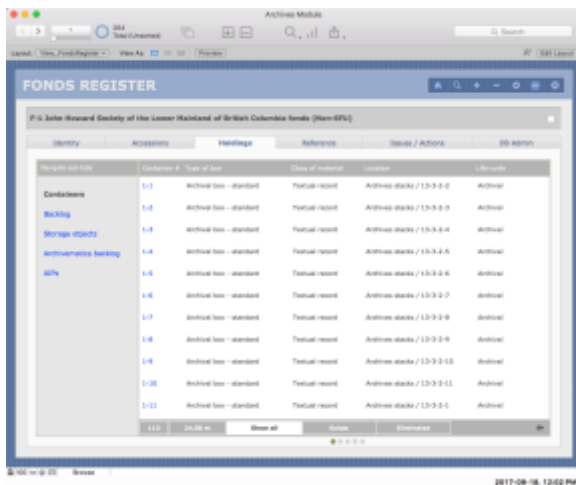
4.6.8 OPEN URL *button (globe icon)*

- Open a url in your default web browser.

4.7 Portals (related records)

4.7.1 Some tabs / sub-tabs present a *Portal* in place of a *Fields area*.

- "Portal" is a FileMaker term for a display list showing records from a different table that are related in some way to the current record.
- If the tab includes sub-tabs, there will be a "Navigate sub-tabs" sidebar in addition to the portal itself.
- If the tab does not includes sub-tabs, the portal will take up the entire record screen.



4.7.2 Not all of the features described here will be present on every portal and they are not all illustrated in the examples given above.

4.7.3 *Portal record*

- Portal records are given against a white background.
- Most fields in a portal cannot be directly edited.

- Occasionally a field may be editable; it will be shaded grey.

4.7.4 *Link (blue text or blue arrowhead)*

- Within the portal, links appear as blue text.
- Occasionally a link may be given a blue arrowhead (pointing to the left).
- Click the link to be routed to that record on its full **Record View** screen.

4.7.5 *EDIT RECORD button (pencil icon)*

- Click the pencil icon to edit the *Portal record*.
- AIS will route you to the appropriate **Data Entry** screen in a new window.

4.7.6 *DELETE RECORD button (trashcan icon)*

- Click the trashcan icon to delete the *Portal record*.
- AIS will prompt you to confirm the delete request.
- Note that what is typically deleted here is the link between two entities rather than the related entity itself.
- For example, in Accession table **Identity > Archival units** tab, the portal shows the links between the accession and one or more fonds records (in the Fonds Register table); by deleting an entry, you sever the link between this accession and that fonds; you do not delete the fonds record itself.

4.7.7 *Portal summary data*

- At the left side in the bar below the portal, one or more fields display summary data about the records displayed in the portal.
- This will typically include the total number of entries.
- Some portals may include additional, context-specific information (e.g. in the illustration above, there are fields returning the total number of boxes and total extent).

4.7.8 *PORTAL FILTER buttons (text)*

- Some portals may allow you to filter the records displayed by the values of one field.
- Field values are represented by the series of PORTAL FILTER buttons.
- There will always be an option to "Show all".
- The filter currently selected is highlighted white.
- Note that if no filter is selected the portal will be empty.
- **If you navigate to an empty portal, always check to see if there are FILTER BUTTONS and make sure at least one of them is selected.**

4.7.9 *GET ALL button (arrow icon)*

- At the right side in the bar below the portal, there may be a GET ALL button.

- Click to retrieve all the records displayed in the portal presented on their table's **List View** screen.

4.7.10 NEW RECORD *button (+ icon)*

- At the right side in the bar below the portal, there may be a NEW RECORD button.
- Click to add a new entry to the portal; the AIS will route you to the appropriate **Data Entry** screen in a new window.
- Not all portals support creation of new entries by this method.

4.7.11 DOWNLOAD *button (individual portal record)*

- If the related records displayed in the portal include digital objects (e.g. uploaded pdf files), you may be able to download it by clicking a DOWNLOAD icon.

4.7.12 DOWNLOAD *button (set of portal records)*

- In some contexts, you may be able to output the portal list as, e.g. a text file.
- In these cases, the DOWNLOAD button will appear in the right side of the bar below the portal, next to the GET ALL and NEW RECORD buttons.

4.8 Navigation buttons bar

4.8.1 The *Navigation buttons bar* is a set of buttons appears in the top right area of the window.

- There are typically eight buttons as illustrated and described here.
- The standard set has evolved over time; some screens may not yet have the full standard set.



4.8.2 HOME *button (house icon)*

- Click to navigate to the module **Home** screen.
- The landing page will typically be the last tab that you had open on the **Home** screen.

4.8.3 SEARCH *button (magnifying glass icon)*

- Search has been implemented differently in different tables.
- The *Old style* predominates; eventually all tables will be moved to the *New style*.

Old style

- FileMaker will switch to find mode, allowing you to search fields on the current screen.
- All fields will be blank.
- Enter search text in a field you wish to search on.
- You can click tabs and sub-tabs to access fields.

- Avoid clicking other links and buttons on the screen; typically they will not work in find mode.
- For more information on using find mode, see the guideline in this User Manual *AIS4 General Features > Search*.

New style

- An **Advanced search** popover window will appear with all fields available for search.
- Enter search text in any number of fields.
- Click the FIND button to execute the search or the CANCEL to close the popover.

4.8.4 NEW RECORD *button (+ icon)*

- Click to create a new record in the current table.
- Typically AIS will route you to the **Data Entry** screen in a new window.
- In some cases, it may simply create a new record and leave you with the new blank record on the **Record View** screen to complete data entry.

4.8.5 DELETE RECORD *button (- icon)*

- Click to delete the current record.
- AIS will prompt you to confirm the deletion request.

4.8.6 REPORTS / ACTIONS *button (gear icon)*

- Click to open a popover window that allows you to select reports and actions relating to the current record or current set of records.
- For more information, see section 1.3 of this manual, *AIS4 General Features > Reports, Actions, Statistics*.

4.8.7 SORT *button (vertical bars icon)*

- Click to sort the current set of records.
- You will be prompted to select the fields on which to sort.
- You can select as many fields as you want and order them as you like.
- You need to know the technical database field names (which are similar to but not the same as the field labels as they appear on-screen).

4.8.8 LIST VIEW *button (horizontal bars icon)*

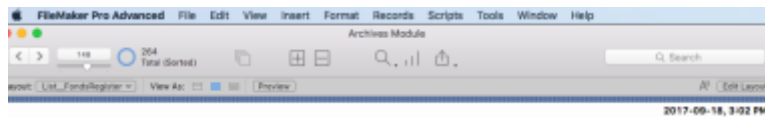
- Click to switch to the **List View** screen for the current set of records.

4.8.9 CLOSE FILE *button (x icon)*

- Click to close the current file and any open windows associated with it.

4.8.10 In addition to the AIS *Navigation buttons bar*, there is also a *FileMaker Status Toolbar* that runs across the top of FileMaker windows.

- See [section 2 above](#) for general comments on the *FileMaker Status Toolbar*.
- **As a rule, always use the AIS buttons rather than the generic FileMaker ones.**
- The AIS buttons are attached to specially designed scripts that implement specific operations.

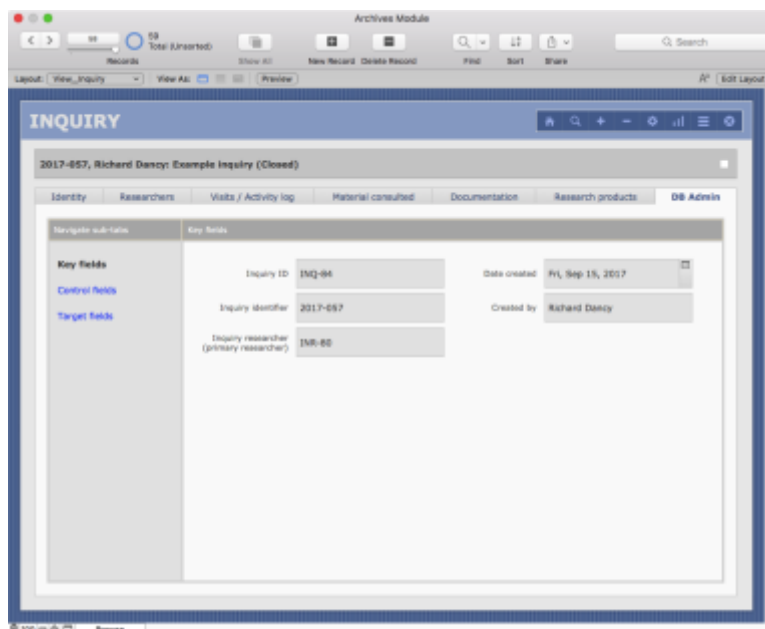


4.9 DB Admin tab

4.9.1 The **DB Admin** tab shows calculation and utility fields mainly used by the System Administrator for trouble-shooting purposes.

- Most users will not need to access this tab.
- Fields cannot be directly edited on this tab.
- The System administrator should use the **Developer** screen to edit control fields.

4.9.2 The **DB Admin** tab typically has three sub-tabs; if a table has many control fields, it may be necessary to use more than three sub-tabs.



4.9.3 *Key fields sub-tab*

- Displays the values of a record's "key" fields.
- A FileMaker *primary key* is a unique identifier used to establish relationships between records across various table.
- The value of a *primary key* typically has the form TablePrefix-SerialNumber (e.g. INQ-123); the value is typically auto-entered at record creation.

- A *foreign key* is a field whose value that references a *primary key* from a different table.
- In addition to the key fields, this sub-tab also shows (on the right side) who created the database record and on what date.

4.9.4 Control fields sub-tab

- *Control fields* are fields whose values are set by calculations or scripts.
- Calculation fields cannot be edited.
- Fields whose values are set script can be edited; they are indicated by an asterisk (*) next to the on-screen field label.
- *Control fields* names include the following conventions:
 - *Sort_* fields for sorting records.
 - *Show_* fields for displaying data.
 - *Report_* fields for formatting reports.
 - *Pointer_* and *Target_* fields for establishing relationships to records in other tables.
 - *Control_*, fields for other, table-specific control purposes.

4.9.5 Target fields sub-tab

- *Target fields* (*Target_*) are a particular type of *control field* that are referenced by external tables to establish relationships to support display of records in filterable portals.
- They typically have the form "Show all [line break] + value".
- In order to function as targets, they must be indexable (i.e. they cannot be calculation fields drawing data from related records in an external table).
- Most are calculation fields drawing from fields in the current table, but some are set by script if they need data stored in external tables (e.g. a list of related record IDs).

5. LIST VIEW SCREENS

5.0.1 A **List View** screen presents an abbreviated view of all records in the current set in the form of a list.

5.1 Table name

5.1.1 The name of the database table appears in the upper left side of the screen.

- It appears in the same location as on the **Record View** screen.

5.2 List entries

5.2.1 The list of entries takes up the bulk of the screen.

- The total number of records in the list can be seen in the *FileMaker Status Toolbar* next to the slider.
- The current record is highlighted white.

- Fields cannot typically be edited on the **List View** screen.
- Links are given as blue text.
- Typically the link in the first column on the left will take you back to the full **Record View** screen for that record.
- The *Mark Record* field on the right of the entry can be toggled on or off.

FOND# #	TITLE	TYPE	RELATION TO STU	STATUS	ACCESSIONS NOT PROCESSED	PAGES/ BOXES	BACKTICAL CONTAINERS	DONOR/ OBJECTS	AGE	MARK
F-238	7th Floor Media funds	Fonds	University	Provisional	3	22		0	0	
F-49	Academic Planning Office funds	Fonds	University	Published	0	0	2	0	0	
F-202	Academic Planning Services funds	Fonds	University	Published	0	0	21	0	0	
F-203	Academic Relations Office funds	Fonds	University	Published	9	14	13	0	0	
F-266	Academic Women funds	Fonds	Carious community	Provisional	1	1		0	0	
F-70	Alan B. Cunningham funds	Fonds	Non-GU	Published	0	0	2	0	0	
F-210	Alumni Relations Office funds	Fonds	University	Provisional	3	4		0	0	
F-271	Angela Hrynuk funds	Fonds	Non-GU	Provisional	1	22		0	0	

5.3 Column headers (sort)

5.3.1 The *Column headers* in the grey box across the top of the list show the names of the fields displayed.

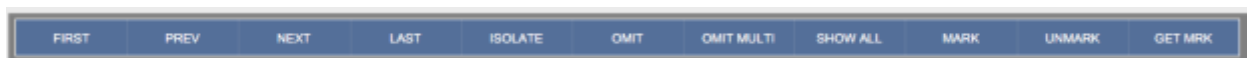
5.3.2 You can sort the list by clicking the *Column headers*.

- Clicking the headers will toggle the direction of the sort.
- E.g. click once to sort ascending (a–z); click a second time to sort descending (z–a).

5.4 List buttons

5.4.1 The *List buttons* along the bottom of the list provide a number of navigation operations.

- There are typically eleven buttons as illustrated and described here.
- The standard set has evolved over time; some screens may not yet have implemented the full standard set.



5.4.2 *FIRST, PREV, NEXT, LAST buttons*

- Takes you respectively to the first, previous, next or last record in the list.

5.4.3 *ISOLATE button*

- Reduces the current set to the current record; all other records omitted.

5.4.4 OMIT *button*

- Omits the current record from the current set.
- **Note that this does not delete the record, it simply excludes it from the current set.**

5.4.5 OMIT MULTI *button*

- Prompts you to specify how many records to omit from the current set.

5.4.6 SHOW ALL *button*

- Restores the current set to all records in the current table.

5.4.7 MARK *button*

- Mark all records in the current set (*Mark record* = checked).

5.4.8 UNMARK *button*

- Unmark all records in the current set (*Mark record* = blank).

5.4.9 GET MARK *button*

- Get all marked records in the current table.

5.5 Navigation buttons bar

5.5.1 The *Navigation buttons bar* appears in the top right area of the window.

- With one exception, it is the same set of buttons that appear on the **Record View** screen, illustrated and described in [section 3 above](#).
- The exception is: it has a RECORD VIEW instead of a LIST VIEW button to take you to the current record on its full **Record View** screen.
- You can use these LIST VIEW / RECORD VIEW buttons to toggle between the two views of the current set.
- The SEARCH button here will either route you to the **Record View** screen in FileMaker find mode (old style) or open an **Advanced search** screen in a popover window (new style).

6. DATA ENTRY SCREENS

6.0.1 A **Data Entry** or **Import Data Review** screen presents all fields available for editing in a single, continuous, scrolling page.

- Whereas the **Record View** screen groups fields by tab, the **Data Entry** screen groups them in sections on a single page.
- **Data Entry** screens are the typical interface for creating new records, accessed when you click the NEW RECORD button in a given table.

- **Import Data Review** screens are typically used when you run a scripted action to import csv data from outside the AIS (e.g. from a spreadsheet or web form).
- Both **Data Entry** and **Import Data Review** screens are structured in the same way.

6.1 Header bar buttons

6.1.1 *Header bar buttons* comprise a set of buttons running along the top (header) area of the screen and relate to completing or cancelling data entry / review.

- These remain stationary as you scroll through the body of the record.
- The buttons are slightly different for **Data Entry** or **Import Data Review** screens.

6.1.2 *DONE button*

- Closes the **Data Entry** window, saving any data entered during the data entry process, and typically routes you to the new record on its full **Record View** screen.

6.1.3 *SUBMIT button*

- Appears only on **Import Data Review** screens in place of the **DONE** button.
- Registers the data imported to create new record(s) and complete the import process.
- The review window closes and you are typically routed to the new record(s) on the **Record View** or **List View** screen.

6.1.4 *CANCEL button*

- Quits the data entry or import process.

- The AIS will prompts you confirm the cancel request, then deletes the current record(s) and closes the **Data Entry / Import Data Review** window.
- Not available on all **Data Entry** screens.

6.1.5 NEW RECORD *button*

- Click to create an additional new record in the same table.
- Make sure you have completed data entry on the current record before creating a new one.
- Not available on all **Data Entry** screens.

6.2 Footer bar buttons

6.2.1 *Footer bar buttons* comprise a set of buttons running along the bottom (footer) area of the screen and relate to navigating the current record or set of records.

- These remain stationary as you scroll through the body of the record.
- Screens that contain few fields may not have the *Footer bar buttons*; other screens may have only some but not all the buttons described here.

6.2.2 ZOOM IN / ZOOM OUT *buttons*

- Increase or decrease the size of text, fields and objects on the screen.
- Note that the top and bottom navigation bars themselves are not affected.

6.2.3 PAGE UP / PAGE DOWN *buttons*

- Scroll the window up or down.

6.2.4 TOP / BOTTOM *buttons*

- Jump to the top or bottom of the screen.

6.2.5 SPELL CHECK *button*

- Checks the spelling in all fields in the current record.

6.2.6 If you have imported data that will result in multiple AIS records, an additional set of buttons appears in the *Footer bar* (not depicted in the example shown):

6.2.7 Record # of # *information*

- Shows how many records were imported and the number of the current record.

6.2.8 FIRST, PREVIOUS, NEXT, LAST *buttons*

- Navigate between records in the set.

6.3 Data entry area

6.3.1 The *Data entry area* contains fields for data entry.

- Fields are grouped into sections boxes.

- White fields can be directly edited.

6.3.2 *Red arrows* appear next to mandatory fields.

- The arrows disappear once you have entered data in the field.

6.3.3 *Section information buttons* may appear in the section header bars.

- Click the button to open a popover window explaining the purpose of the section and giving guidance for data entry in particular fields.
- *Section information buttons* have not yet been implemented in all **Data Entry** screens.

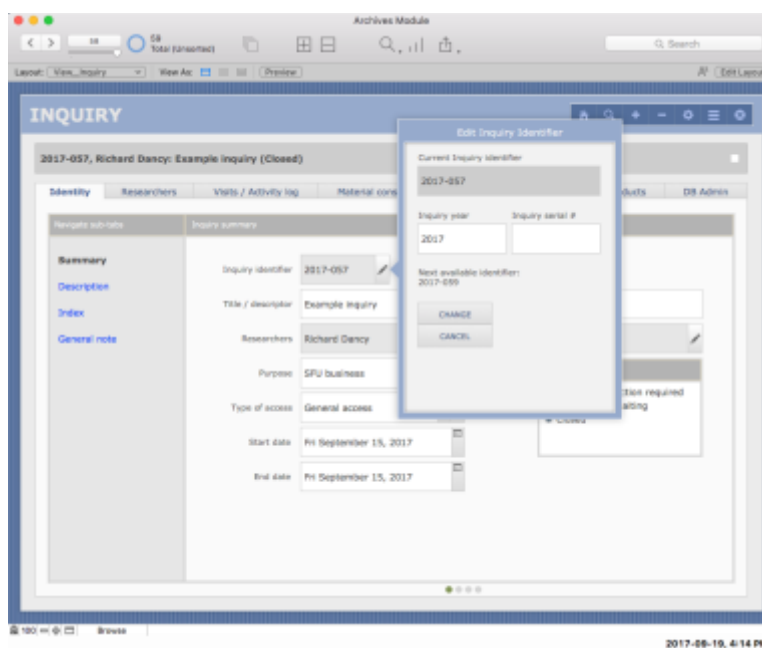
6.4 Sidebar portal

6.4.1 Some **Data Entry** screens include a sidebar on the right side of the window with a portal showing other entries related to the same parent record.

- For example: all sources registered to the same accession.
- The current record you are working with on the **Data Entry** screen is highlighted grey in the *Sidebar portal*.
- To navigate to a different record (while staying on the **Data Entry** screen), click its entry in the portal.
- Not all **Data Entry** screens include the *Sidebar portal*.

7. POPOVER WINDOWS

7.1 A FileMaker popover is a small window that floats over the current layout and can be triggered by clicking buttons or text objects.



7.2 The AIS uses popover windows for various purposes. Popovers may:

- Present context-specific explanatory text.
- Provide an interface for creating related records in other tables.
- Enable users to access portal data when there is not enough screen space to display the all relevant fields in the portal.
- Provide pick-lists and menus (e.g. for reports).

7.3 To close a popover window, click the CLOSE or CANCEL button or click anywhere outside the popover.

8. DEVELOPER SCREENS

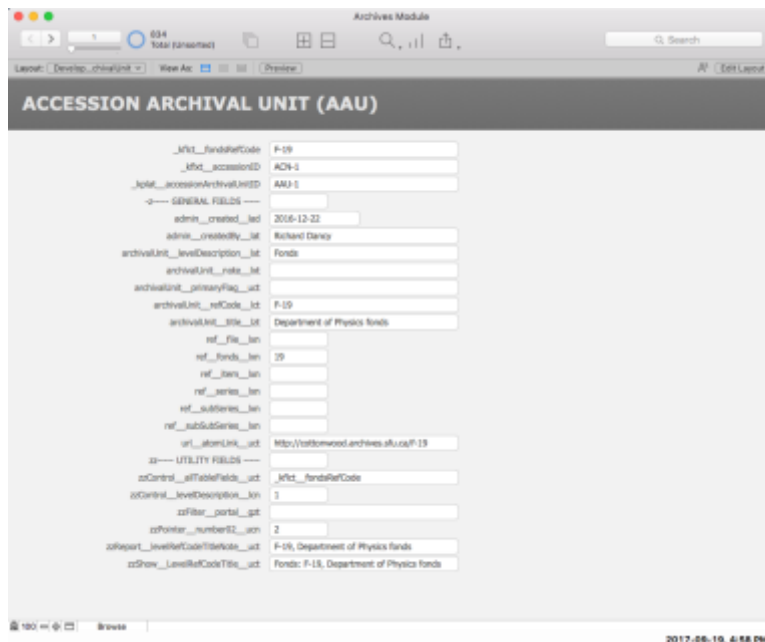
8.1 **Developer** screens show all the fields in a table in a simple alphabetical listing.

- It includes behind-the-scenes utility fields (prefixed `zz`) that the user does not typically interact with.
- Most (but not all) of the utility fields are also accessible from the **DB Admin** tab on the **Record View** screen (see [section 4.9 above](#)).

8.2 **Developer** screens are not readily accessed by users, and are intended for system administrators to facilitate trouble-shooting; they are also accessed by AIS scripts as required.

8.3 To access a **Developer** screen:

- Switch to FileMaker Edit Layout mode.
- Use the FileMaker *Layout Menu* to navigate to the appropriate screen in the Developer folder.
- You may or may not have access privileges to access these features.



- 8.4 Most tables in the AIS include a field (*Control__allTableFields__ucf*) that returns the name of all fields in the table.
- Access this field on the **Developer** screen to copy / paste or export a list of the table's fields.
 - Note that the list will only be complete if in fact all fields are included on the **Developer** screen.

Document Control

Version history			
<u>Version</u>	<u>Date</u>	<u>Finalized by</u>	<u>Version notes</u>
v1.0	Nov 16, 2017	Richard Dancy	First iteration

TAB 2
RECORDS MANAGEMENT MODULE

TAB 3
ARCHIVES MODULE

3.3 ARCHIVAL INQUIRIES

Status Final (v1.0)
 Last updated November 16, 2017

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1. OVERVIEW

1.1 An **Archival Inquiry** is a request from a **Researcher** to the Archives for:

- Access to archival holdings; or
- Information based on archival holdings; or
- Information about the Archives program.

Use the Inquiry table in the Archives Module to register and track these requests.

The screenshot displays the 'INQUIRY' form in a web browser. The form is for an inquiry with ID '2017-057' by researcher 'Richard Dancy'. The status is 'In progress: waiting'. The form includes the following fields and values:

- Inquiry identifier:** 2017-057
- Title / descriptor:** Example inquiry
- Researchers:** Richard Dancy
- Purpose:** SFU business
- Type of access:** General access
- Start date:** Fri September 15, 2017
- End date:** (empty)

A status dropdown menu is open, showing the following options:

- In progress: action required
- In progress: waiting
- Closed

1.2 Inquiries vary in complexity. An inquiry may be:

- A short, one-time interaction in which an archivist provides information to an anonymous researcher (e.g. in a telephone call); or
- An extended research project involving multiple researchers making multiple visits to the Archives' reading room to consult the Archives' holdings over the course of months.

1.3 Use the Inquiry table to:

- Register an inquiry.
- Update its status (in progress or closed).
- Flag inquiries that require action by the Archives.
- Register one or more researchers (or leave anonymous).
- Record multiple interactions with researchers over time.
- Track archival materials retrieved and consulted.
- Process digitization requests arising from the Inquiry.

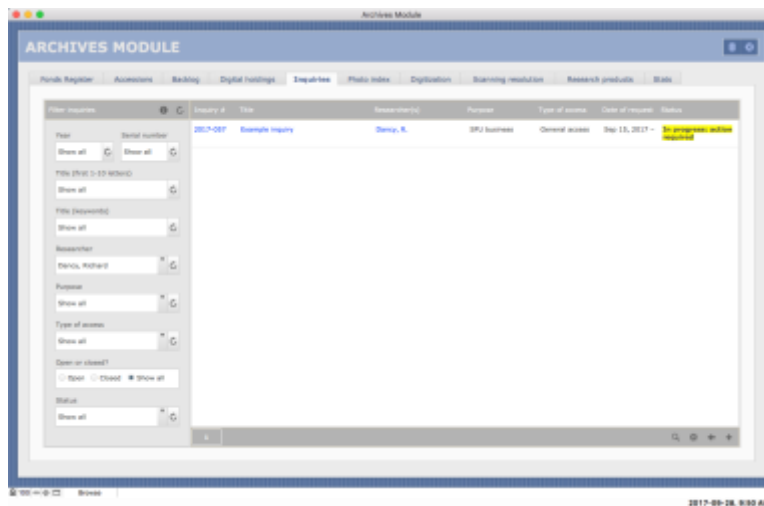
- Document agreements and notifications that have accountability implications.
- Log research products associated with the Inquiry.
- Generate reports and statistics about archival reference service.

1.4 Inquiries are assigned unique identifiers in the form YYYY-NNN.

- E.g. 2017-044 = the 44th inquiry of 2017.
- The identifier can be edited (but you will be warned if a number has already been assigned to a different Inquiry).
- Behind the scenes, AIS also assigned a unique ID in the form INQ-x; this ID cannot be edited and is used to link the Inquiry to other records throughout the system.

2. VIEW / BROWSE INQUIRIES

2.1 Browse existing inquiries on the **Home > Inquiries** screen.

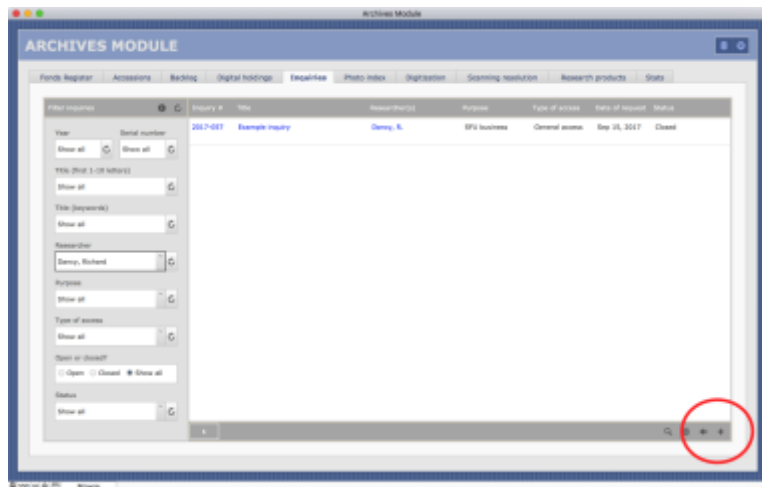


2.2 The display list shows inquiries that match the filter criteria selected on the left.

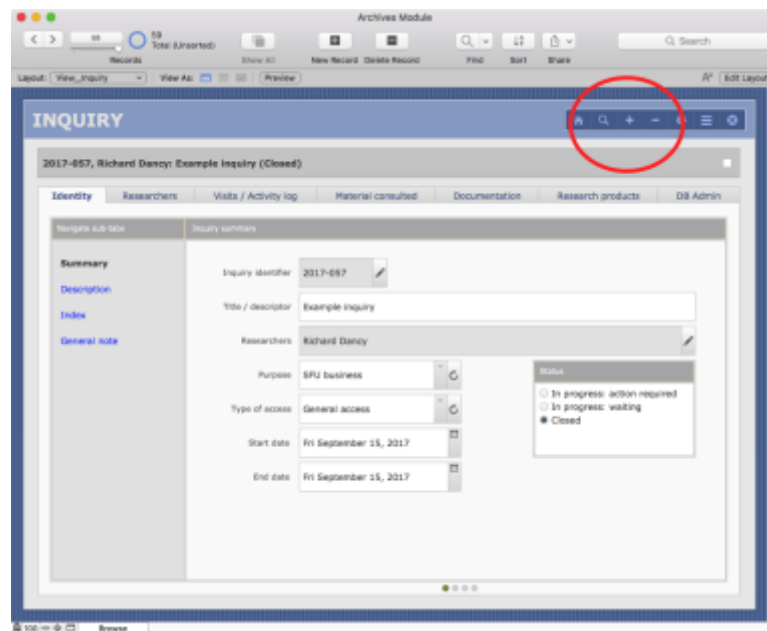
- Filters by default are set to "Show all".
- The list is sorted by *Inquiry status* so that any inquiries that require action by Archives appear at the top, with the status field highlighted.
- Click the *Inquiry number* or *Inquiry title* links to navigate to the full inquiry record.
- Click the *Researcher(s)* link to navigate to the agent authority records of the researcher(s).
- Click the GET ALL button (arrow icon below the display list) to get all displayed inquiries on the **List View** screen.
- The example illustrated here shows a list of only one entry (to avoid showing here actual researchers' information).

3. CREATE A NEW INQUIRY

- 3.1 Create a new inquiry from either the **Home** screen or from the Inquiry table on any **Record View** or **List View** screen.
- 3.2 From the **Home** screen:
 - Click the NEW RECORD button (+ icon) in the lower right section of the screen below the display list.



- 3.3 From the **Record View** or **List View** screens:
 - Click the NEW RECORD (+) icon in the Navigation Bar in the upper right area of the screen.



- 3.4 By either method, AIS will create a new inquiry record and route you to the **Data Entry** screen in a new window.

4. DATA ENTRY SCREEN

4.1 Click the HELP button (top right) to download (pdf) the Data Dictionary for the Inquiry table.

4.2 The **Data Entry** screen is organized into three areas:

- All the fields in Section A are mandatory.
- Sections B (Description) and C (Primary researcher) are optional.
- For quick, one-off inquiries Section A is sufficient.
- For inquiries that are likely to result in multiple interactions or required substantial research by the reference archivist, you should complete Sections B and C as well.

4.3 For quick, one-off inquiries, you do not need to enter / register the researcher's name and contact details.

- **But do enter the researcher's department or affiliated organization whenever possible as this supports statistical analysis.**
- If you leave both the person and department blank, the Inquiry researcher will appear as "Anonymous".
- Record the researcher's name and full details if the inquiry is likely to result in multiple interactions over time.

4.4 If the researcher's name or the name of the department / affiliated organization do not appear in the respective drop-down list, click the + button next to the field to add a new agent record.

- For details, see [AIS4 User Manual, 5.2 Add a New Agent from a Pick List](#).
- 4.5 If you do register the researcher (i.e. select an agent in the *Person* field), note the UPDATE button that may appear at the bottom of this section.
- The UPDATE button will appear when the researcher's contact details on the current screen are different than the data on the agent authority file.
 - **Click the UPDATE button if you want to overwrite the details on the agent record with the information as entered on the current Data Entry screen.**
 - The researcher's agent record should always have the most current information.

5. VIEW / EDIT AN INQUIRY

- 5.1 To subsequently view or edit an inquiry record, navigate to it (e.g. from the **Home** screen).
- 5.2 The **Record View** screen shows a complete individual record.
- The fields are organized into tabs and sub-tabs.
 - Click the List button (horizontal lines icon) in the Navigation buttons bar in the upper right section of the screen to get a list view of all records in your current set.
 - For more information on the general feature of any **Record View** screen, see [AIS4 User Manual, 1.1 Common Screens / Layouts](#).

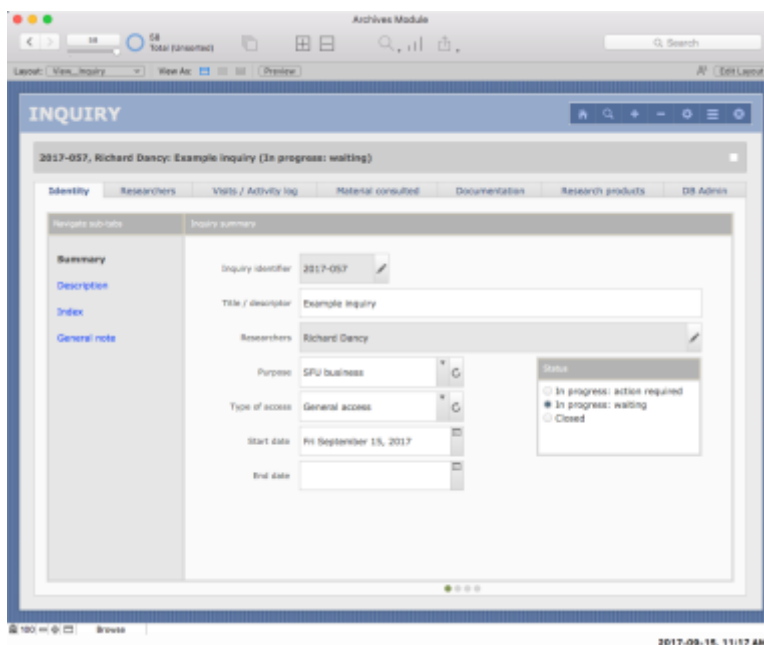
- For detailed descriptions of each field, see [AIS4 Data Dictionary > Archives Module > Inquiry](#).

5.1 Identity tab

5.1.1 The **Identity** tab gives an overview / summary of the inquiry.

5.1.2 The *Status* field should be updated as required.

- "In progress: action required" = the inquiry is waiting on the Archives to complete an action.



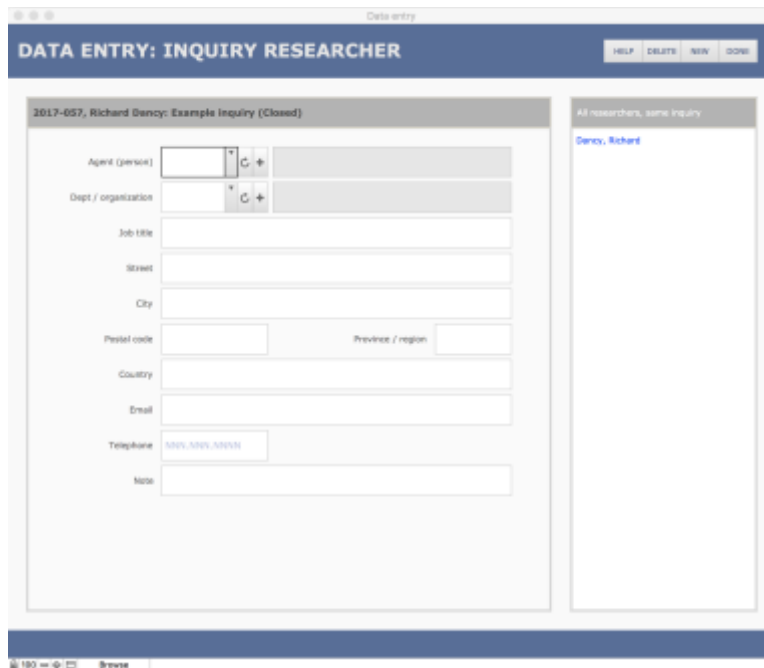
5.2 Researchers tab

5.2.1 The **Researchers** tab displays a portal showing researchers associated with an Inquiry.

- The researcher's name is a link; click to go the researcher's Agent authority record.
- 0 entries = anonymous inquiry.
- If researchers are registered, you must always select one as the "primary researcher" (even if there is only one researcher).
- Click the check box in the person's entry to select as the primary researcher.
- The primary researcher's entry will be shaded.

5.2.2 Add a researcher by clicking the Add button (+ icon) in the bar below the display portal.

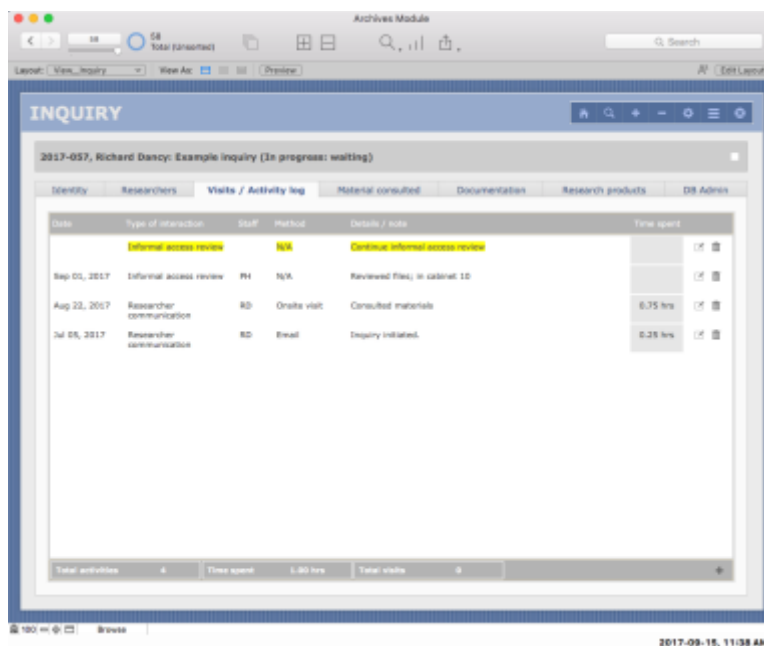
- The AIS routes you to **Data Entry: Researchers** screen in a new window.
- See remarks above (4.4, 4.5) on data entry for researcher information.



5.3 Visits / Activity log tab

5.3.1 The **Visits / Activity log** tab displays a portal showing communications relating to the inquiry and interactions with its researchers.

- You can directly edit the *Time spent* field (enter the number of hours).
- To edit the other fields, click the EDIT button (pencil icon); the AIS will route you to that entry on the **Data Entry** screen in a new window.



5.3.2 You can add entries for actions that have not yet been done in order to flag tasks that the Archives must still complete.

- By leaving both the *Date* and *Staff* fields blank, an entry is flagged as outstanding.
- Outstanding actions are highlighted yellow in the portal display list.
- When the action is completed, edit the entry to complete the *Date* and *Staff* fields.

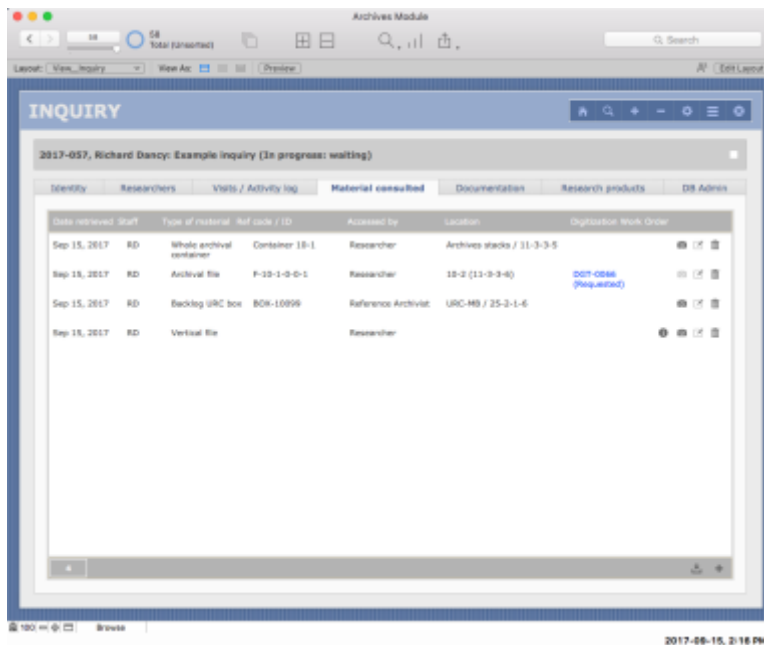
5.3.3 Add a new entry by clicking the Add button (+ icon) in the bar below the display portal.

- The AIS routes you to the **Data Entry: Activity Log** screen in a new window.
- The *Update inquiry status* field (greyed out) refers to the inquiry as a whole, not this particular action; click the Edit button (pencil icon) to update the inquiry status.

5.4 Materials consulted tab

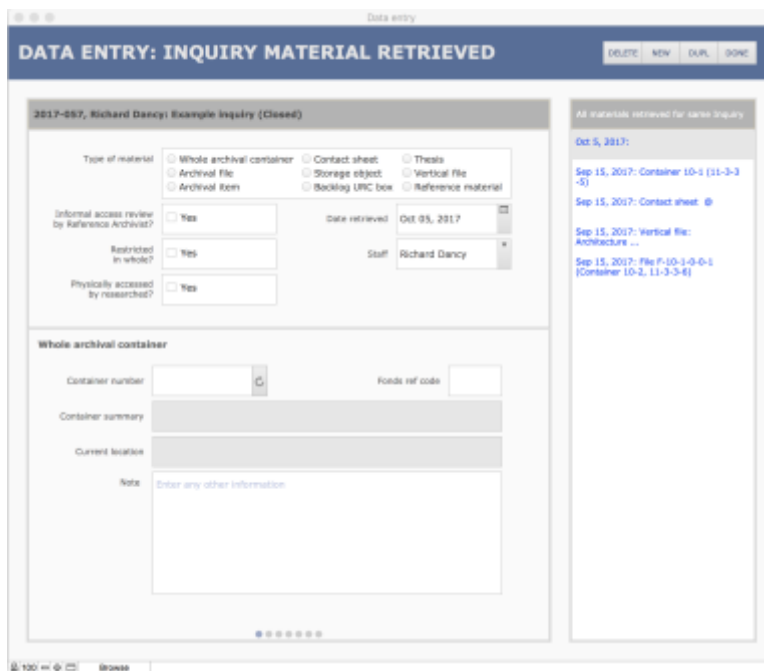
5.4.1 The **Material consulted** tab displays a portal showing archival materials that have been retrieved for purposes of answering the inquiry.

- An INFORMATION ICON ⓘ will appear if the entry includes a *Note* (not displayed in the list); to view / edit the *Note* field, click the icon.
- The DIGITIZATION icon (camera) is used to add material to a digitization Work Order (see [section 5.5](#) below).
- If the material has already been added to a Work Order, the camera icon in its entry will be greyed out and the *Digitization work order* field will function as a link to the full Work Order record (e.g. DGT-0046).
- If the Work Order has been completed, the text will be presented as strike-through (e.g. ~~DGT-0046~~).



5.4.2 Add new materials by clicking the ADD button (+ icon) in the bar below the display portal.

- The AIS routes you to **Data Entry: Inquiry Material Retrieved** screen in a new window.
- The fields available in the lower data entry area will vary according to the *Type of material* selected.
- The **DUPLICATE** button (upper right area of the screen) will add another retrieval record using most of the same data (type of material, date, staff) as the current entry; the full identifier will not be duplicated.



5.5 Digitization Work Orders

5.5.1 Before you can add material to a Digitization Work Order, you must first have registered the file / item to be digitized as material consulted as described in [section 5.4 above](#).

5.5.2 Note that there can be multiple Work Orders for one Inquiry.

- **Once a Work Order has been logged as "Completed" you should not add to it; create separate Work Orders as needed.**

- For example, a researcher requests a reproduction, it is completed and delivered; the researcher then subsequently requests other material for reproduction.
- In this example, the second request should be registered as a separate Work Order.

5.5.3 Add material to a Work Order by clicking the DIGITIZATION (camera) icon in its entry.

- The AIS routes you to **Data Entry: Digitized Material** screen in a new window.

5.5.4 Add the material to an existing Work Order or create a new one.

- The drop-down list shows all Work Orders associated with the inquiry that are still in progress.
- If there are no such Work Orders, the field will be shaded; you must click the NEW (+) button to create a new Work Order (see note 5.5.7 below).
- The CANCEL buttons (in the upper navigation bar) and the CLRFLDS (clear fields) button (in top of the data entry area) have the same effect – they clear all fields, removing the material from any Work Order.
- But whereas the CANCEL button also closes the **Data Entry** window, the CLRFLDS button leaves it open.

5.5.6 You can add other material to a Work Order from the same **Data Entry** screen:

- Click an entry in the sidebar to the right to navigate to that record while remaining on the same screen.
- Enter any other pertinent information relating to the digitization of the unit.
- A camera icon will appear next to entries that have already been added to a Work Order.
- Note that you can later navigate to a digitization Work Order to view / enter more detailed information, e.g. special instructions, notes about the Work Order as a whole.

5.5.7 If you create a new Work Order (see 5.5.4), the AIS will open a new (smaller) window with a new **Data Entry** screen.

- Complete fields and click the Done button to create the new Work Order.

5.6 Documentation tab

5.6.1 The **Documentation** tab displays a portal showing documentation associated with the inquiry; it allows you to upload digital files and view, edit and add documentation metadata.

5.6.2 **Upload only documentation that is needed by the Archives for long-term accountability purposes.**

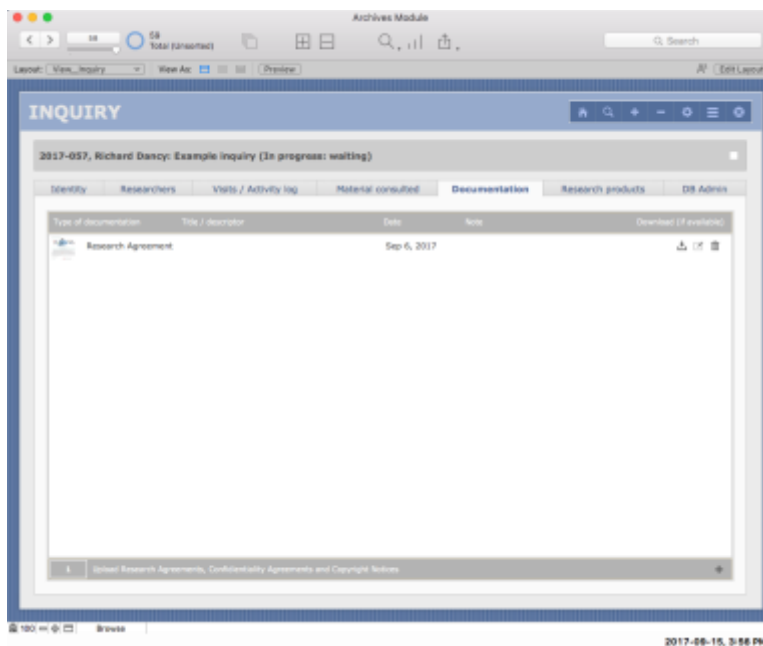
5.6.3 **Do not upload here:**

- Copies of routine email correspondence (keep this in the Inquiry's email case file in SFU Connect, retained for CY Inquiry closes + 2 years).
- Working and transitory documents, e.g. AtoM search results (keep these on the Inquiry's desktop case file, retained for CY Inquiry closes + 2 years).
- Digitized output (retain a copy on the Inquiry's desktop case file and upload one copy to Virtual Stacks).

- Copies of research products (use the [Research Products](#) tab for this purpose).

5.6.4 **Do upload here:**

- Scanned copy of a signed Research Agreement and any addendums.
- Scanned copy of a signed Confidentiality Agreement.
- Copyright Notices sent by SFU Archives to the researcher(s).



- 5.6.5 You can download the digital file directly from the portal by clicking the DOWNLOAD icon in its portal entry.
- 5.6.6 Add new documentation by clicking the ADD button (+ icon) in the bar below the display portal.
- The AIS routes you to **Data Entry: Documentation** screen in a new window.
- 5.6.7 To upload a digital copy of the documentation, on the **Data Entry** screen click the appropriate UPLOAD button (Image, PDF, Other type) and navigate to the file.
- Click the CLEAR button to clear the field.
 - Signed Research and Confidentiality agreements should be scanned as PDFs for upload.
 - Copyright notices should be uploaded as PDFs rather than Word or LibreOffice documents.
- 5.6.8 The *Title / descriptor* field can be left blank if you selected one of the standard values in the *Type of documentation* field (Research agreement, Confidentiality agreement, Copyright notice).
- If you choose "Other" as the *Type of documentation*, enter a title or descriptor.
- 5.6.9 The *Text content* field returns the text of the document but only if the file is a .txt file; it does not work with PDF or Word documents.

- This field is generally not relevant for inquiries as the documents uploaded will typically be PDFs.

5.6.10 There are a number of fields (*File name, Specs* etc.) that returns data from the digital object itself.

5.7 Research products tab

5.7.1 The **Research products** tab shows a portal displaying works created by researchers associated with the inquiry.

- You can upload a digital copy of the work if available; or just provide a citation to the work.
- If a digital copy has been uploaded, you can download it directly from the portal by clicking the **DOWNLOAD** icon.

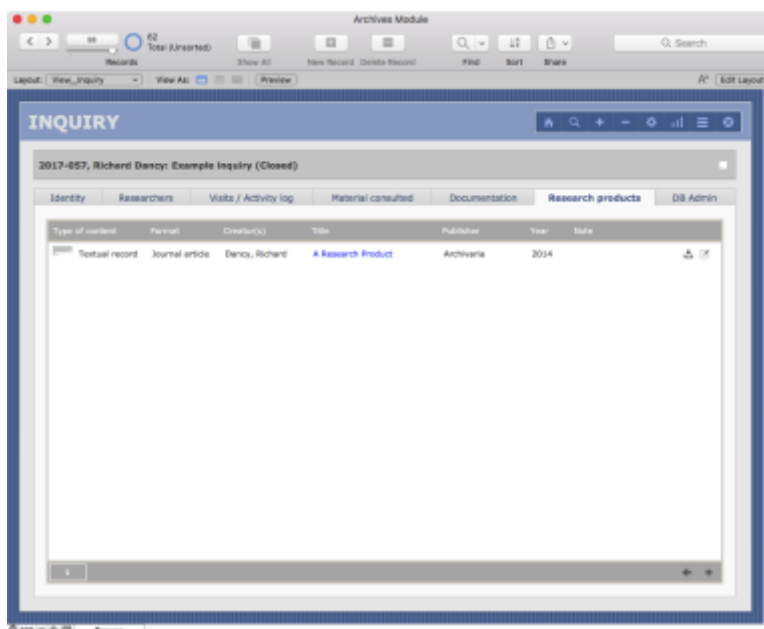
5.7.2 Add new documentation by clicking the Add button (+ icon) in the bar below the display portal.

- The AIS routes you to **Data Entry: Documentation** screen in a new window.

5.7.3 Note that you can register research products that are unrelated to any specific inquiry by creating a new record from the **Home > Research products** tab.

- This will also route you to the same **Data Entry** screen.

- 5.7.4 For more information on research product records, including field descriptions, see *AIS4 User Manual, 3.6 Research Products*.



5.8 DB Admin tab

- 5.8.1 The **DB Admin** tab is primarily intended for the AIS System Administrator to facilitate system trouble-shooting.

- It displays calculation fields and other data needed "behind the scenes."
- Most users should not need to access this tab, and fields cannot be directly edited here.
- For more information on the **DB Admin** tab, see [AIS4 User Manual, 1.1 Common Screens / Layouts](#).

5.9 List view

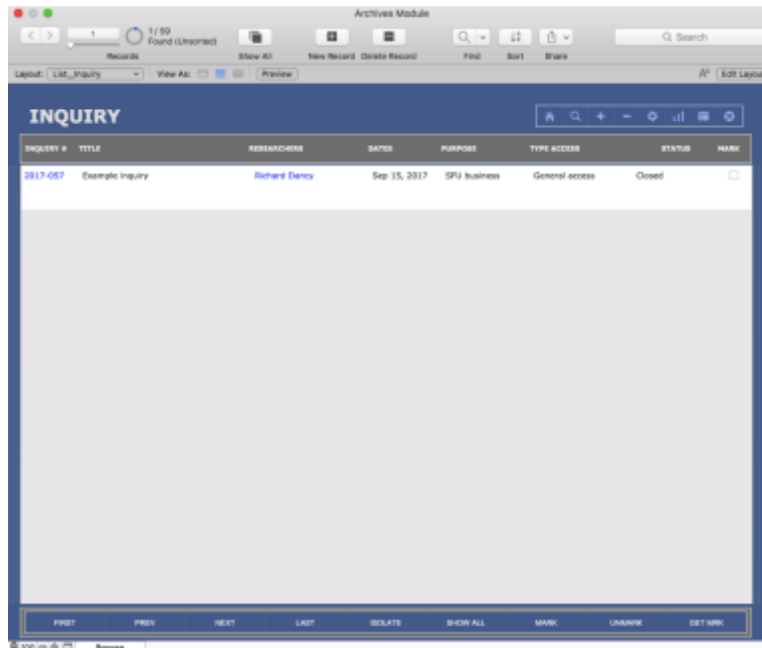
- 5.9.1 The **List View** screen shows an abbreviated entry for each record in your current set.

- Access the **List View** by clicking on the LIST VIEW icon in the NAVIGATION BUTTONS in the upper right section of the screen.

- 5.9.2 The current record on **List View** is highlighted white.

- Sort the records by clicking on a header column; click the same header again to reverse sort by the same field.
- To return to the full **Record View** screen for an entry, click its *Inquiry identifier* (blue link) or select it in the list and click the FULL VIEW icon in the Navigation Buttons in the upper right section of the screen.
- *Name(s) of the researcher(s)* functions as a link (blue text); click to navigate to the researchers' Agent authority records.

- 5.9.3 Note that in the example given below, there is only one record in the current set (to avoid showing actual researcher names and data).
- 5.9.4 For more information on the buttons and general features of the List View screen, see the description [AIS4 User Manual, 1.1 Common Screens / Layouts](#).



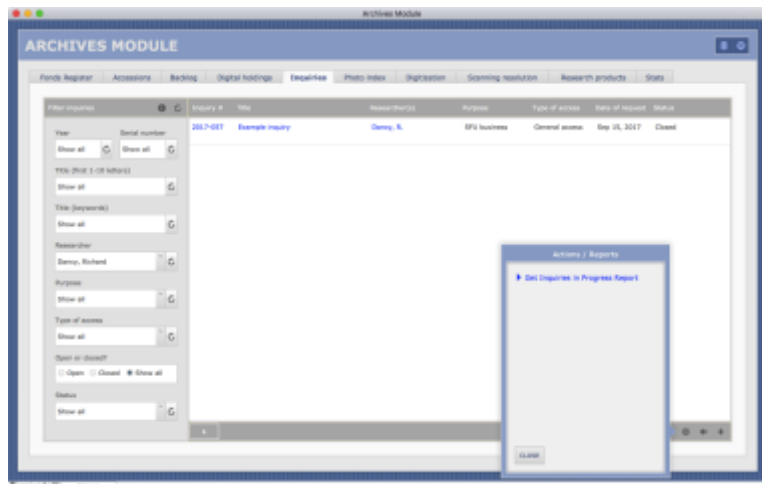
6. REPORTS AND ACTIONS

- 6.1 You can run reports and pre-programmed actions on inquiry records from the **Home** screen or any inquiry **Record View** or **List View** screen.
- **Home** screen reports and actions operate on all records in the Inquiry table.
 - **Record View** / **List View** reports and actions operate on the current record or the current set of records.
- 6.2 For more information on generating reports, see *AIS4 User Manual 1.3, Reports, Actions, Statistics*. The following paragraphs describe the reports available in the Inquiry table.

6.1 Home screen reports and actions

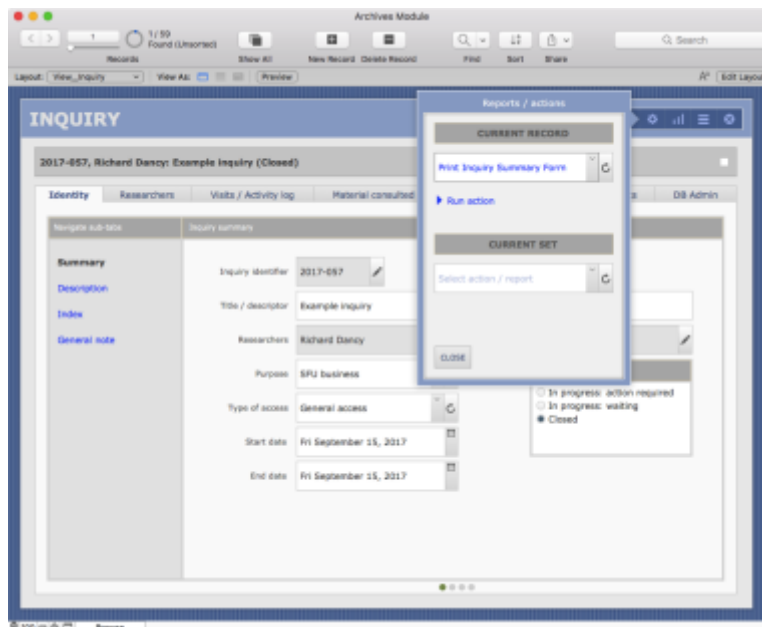
- 6.1.1 On the **Home > Inquiries** screen, click the **ACTIONS** button (gear icon) to open **Reports / Actions** menu. The following reports / actions are currently available.
- 6.1.2 *Get Inquiries in Progress Report*
- Finds all inquiries currently in progress (*Status* = "In progress: waiting" or "In progress: action required").
 - Sorts inquiries alphabetically by primary researcher.

- Report displays researcher(s) and latest five communications.
- Inquiries requiring Archives' action highlighted.
- This report can be printed e.g. at the start of the week or on Reference Archivist handover from one staff to another.



6.2 Current record

- 6.2.1 On the **Record** or **List View** screen, click the **ACTIONS** button (gear icon) to open **Reports / Actions** menu. The following reports / actions are available for the current record.



6.2.2 *Print Inquiry Summary Form*

- Creates a printer-ready summary form for the current inquiry.
- Includes a list of researcher communications / actions sorted chronologically from earliest to latest (displays up to 200 entries).

- Includes a list of materials consulted / retrieved sorted by type of material and reference code (displays up to 400 entries).

6.3 Current set

6.3.1 On the **Record** or **List View** screen, click the ACTIONS button (gear icon) to open **Reports / Actions** menu. The following reports / actions are available for the current set of records.

6.3.2 *Basic list*

- Creates a printer-ready list of the inquiries in the current set.
- Prompts to supply a report title.
- Report shows inquiry ID, title, researcher(s), dates, purpose, type of access and status.
- Default sort order sorts by inquiry ID, but can be sorted by other column headers or manually by any field in the Inquiry table.

Document Control

Version history			
<u>Version</u>	<u>Date</u>	<u>Finalized by</u>	<u>Version notes</u>
v1.0	Nov 16, 2017	Richard Dancy	First iteration

TAB 4
FIPPA MODULE

TAB 5
AUTHORITY CONTROL MODULE

5.2 ADD A NEW AGENT FROM A PICK LIST

Status Final (v1.1)

Last updated November 16, 2017

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1. OVERVIEW

- 1.1 Drop-down lists of names (of corporate bodies, persons or families) appear throughout AIS4 in various contexts.
- For example, when adding a contact to a Privacy Breach on the **Data Entry** screen, the *Contact* field gives a list of person names and the *Department* field gives a list of corporate body names.
 - The lists are generated from records in the Agent table of the Authority Control Module.
- 1.2 If the name that is needed does not appear in the list (i.e. no authority record currently exists), the user typically has the option of creating a new agent record by clicking a button next to the list.
- The process works the same in all AIS4 tables and modules and is described here.
 - The example illustrated here is from the FIPPA Module > Privacy Breach table.

2. ADD AN AGENT

- 2.1 Click the ADD icon (+) next to the drop-down list.
- The AIS opens a popover window for data entry.
- 2.2 Complete all the fields in the popover window.
- Note that some fields may be pre-populated according to the context.
 - See [section 3 below for details about each field](#).
- 2.3 Click the ADD button to create the new agent record.

- The AIS will create the new agent, close the popover window, and set the ID of the new record in the drop-down list field.

2.4 To cancel, click the CANCEL button.

- The AIS will close the popover window; no new record is created.

2.5 **In some contexts, you may be required to add further information about the agent on the initial Data Entry screen and an Update button will appear.**

- E.g. when adding a contact to a privacy breach (illustrated below) there are several fields for contact information (*Job title, Email, Telephone*).
- When you enter data in these fields, an UPDATE button will appear: click to update the agent record with the data entered.
- The agent record should always be updated with the most current contact information.

2.6 To view or edit the full agent record (e.g. add name variants) you must navigate to it in the Authority Control Module.

3. FIELDS

3.0.1 This section describes the fields that appear in the popover data entry window.

- The fields on the popover window are actually global fields residing in the Home table.
- A global field is one that has the same value across all records in a table and can be accessed from any record in any table.
- When you click the ADD button as described above (step 2.3), the AIS uses the global values to populate the fields of the new Agent record.

3.1 Name

3.1.1 Give the agent's name.

- **For persons, use LastName, FirstName form (e.g. "Jenkinson, Hillary").**
- For corporate bodies, use the full name rather than an abbreviation (e.g. "Department of English" not "English").
- For families, use the surname + " family" (e.g. "Halpern family").

3.2 Type of agent

3.2.1 Select the type of agent: Corporate body, Person, Family.

3.3 Relation to SFU

3.3.1 Select the agent's relationship to the university.

3.3.2 *Corporate bodies*

- "University" = Official departments of the university; any body that is considered part of SFU for FOI purposes.
- "Campus community" = Campus-based organizations that are not official bodies of SFU, e.g. Student Society, Faculty Association.
- "Non-SFU" = Any other organization.

3.3.3 *Persons*

- "University" = Employees and students of the university.

- "Campus community" = Alumni, retirees, employees of campus community corporate bodies.
- "Non-SFU" = Any other person.

3.3.4 *Families*

- All families should be registered as "Non-SFU".

3.4 Role(s)

3.4.1 Different agents play different roles throughout the AIS, and the same agent can have more than one role.

- Check all that apply.

Definitions and examples

3.4.2 *Records creator*

- Use for an agent that is a creator of archival records.
- Use for all university and campus community corporate bodies (even if they have not yet transferred material to the Archives).
- For non-SFU corporate bodies and all persons and families, select only if they have donated materials to the Archives.

3.4.2 *Donor*

- Use for a person that had legal ownership of non-university records that were donated to the Archives.
- Do not use for corporate bodies or families (records creators).
- Differs from a contact: a donor is the legal owner; a contact acts on behalf of the legal owner.
- E.g. a faculty member (records creator) is deceased and the heir (donor) donates the records.
- E.g. an organization (records creator) is defunct and a former member (donor) had custody and donates the records.

3.4.3 *Contact*

- Use for persons who act on behalf of another agent.
- Applies to all university staff employees in their interactions with the Records Management and FIPPA programs.
- E.g. an SFU employee (contact) of an SFU department (records creator) who requests a file retrieval or reports a privacy breach case.
- E.g. an officer (contact) of an active organization (records creator) who is authorized to sign off on a Donation Agreement for the organization.

3.4.4 *Researcher*

- Use for a person who has makes an archival inquiry, i.e. requests access to archival holdings or requests information supplied by an archivist based on archival holdings.
- E.g. a student accessing holdings.
- E.g. an SFU employee accessing holdings for university business.
- Note that an SFU employee may be both contact (for Records Management retrievals) and a researcher (for Archival inquiries).

3.4.5 *General organization*

- Use for non-SFU corporate bodies that have not donated records to the Archives.
- E.g. the affiliated organization of a researcher.

Application

3.4.6 Note that an agent may have more than one role; check as many apply.

3.4.7 *Corporate bodies*

- All university and campus community bodies > "Records creator".
- All non-university bodies that have donated records to Archives > "Records creator".
- All non-university bodies that have not donated records to Archives > "General organization".

3.4.8 *Persons*

- All non-faculty employees of university and campus community bodies > "Contact".
- Fonds creators / collection collectors of materials donated to Archives > "Records creator".
- Legal owners of materials donated to Archives > "Donor".
- Employees, officers, heirs or representatives of records creators involved in the donation of their materials to Archives > "Contact".
- Individuals who make archival inquiries > "Researcher".

3.4.9 *Families*

- Families are only ever registered if they are the creators of materials donated to Archives > "Records creator".

3.5 Status

3.5.1 Indicate whether the agent is or is not currently active.

3.5.2 *Corporate bodies*

- Either active, defunct or not known.

3.5.3 *Persons*

- If the person is a contact, either active (still a contact for the affiliated organization), retired, deceased or not known.
- If the person is not a contact, either active (alive), deceased or not known.

3.5.6 *Families*

- Either active (at least one family member is still alive) or defunct.

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5.2 Add a New Agent from a Pick List

Document Control

Version history			
<u>Version</u>	<u>Date</u>	<u>Finalized by</u>	<u>Version notes</u>
v1.1	Nov 16, 2017	Richard Dancy	Adapted from earlier wiki page
v1.0	Jun 17, 2017	Richard Dancy	First iteration on wiki

TAB 6
REPOSITORY MANAGEMENT MODULE

TAB 7
OFFICE ADMINISTRATION MODULE