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AIS HOW-TO GUIDE

January 20, 2003

Create a fonds / collection record

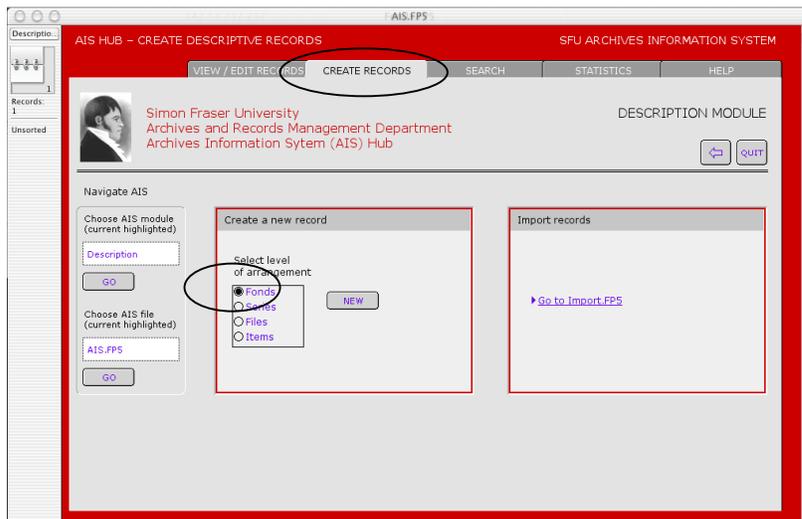
Overview

Use Fonds.FP5 to create new records and assign fonds numbers to both **fonds** and **collections**. The procedure is different for each. An authority record must be established for the fonds-creator before creating the fonds record. No authority record is required for collections.

Initiating a new record

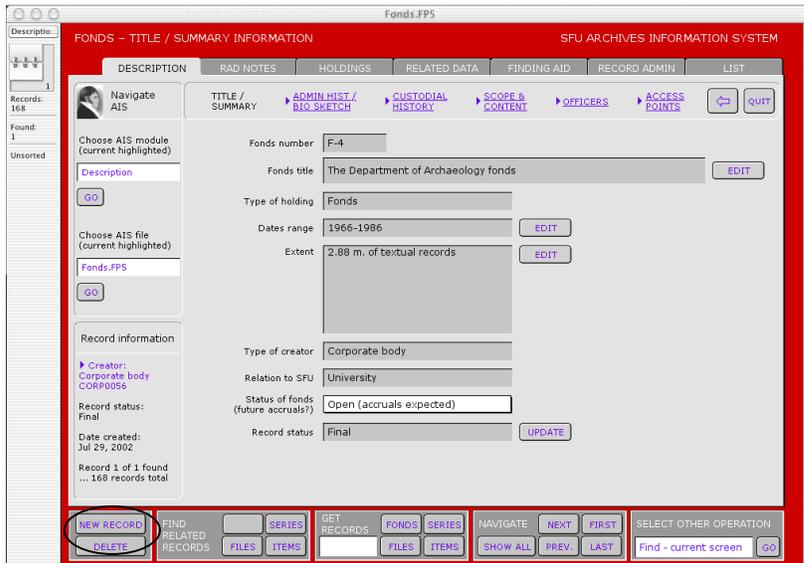
The creation of new records can be initiated from either the **AIS Hub** or from within **Fonds.FP5**.

To create a new record from the **AIS Hub**, click the "Create records" tab from within the Description module (red background).

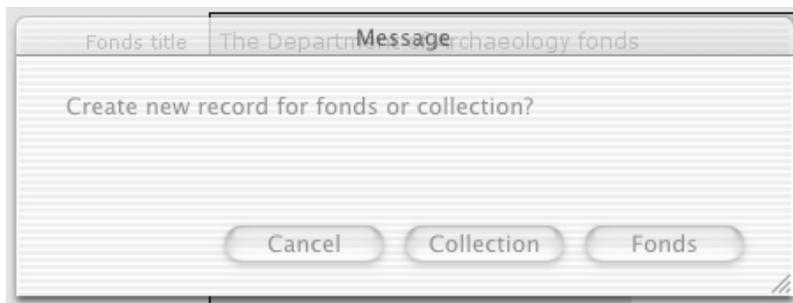


In the "Create a new record" box, select "Fonds" as the level of arrangement and click the "New" button.

To create a new record from **Fonds.FP5**, click the "New record" button on the *activity strip* in the lower left-hand corner.



A message box will appear requiring you to indicate whether the new record is for a fonds or a collection; click the appropriate button. "Cancel" will return you to your original record.



Collection

The "Create new collection record" screen requires you to complete three fields.

Collection title is the formal name of the collection as it will appear on the finding aid title page. Whenever possible, use "The" as the first word of the title and "collection" as the last word (e.g. "The Nora and Ted Sterling Prize collection").

Authority name is the name of the collection as it will appear in alphabetical listings of fonds and collections. Use the word that best describes the collection as the first word of the authority name. Do not begin with the word "The" and do not use the word "collection" in the authority name (e.g. "Sterling Prize, Ted and Nora").

Relation to SFU: indicate whether the collection comprises university or private records.

When you have completed data entry, click "Create" to continue. Note that the AIS will not allow you to continue until you have entered data in each of the three required fields. Click "Cancel" to terminate creation process and return to original record. Click "Clear" to clear fields for re-entering data.

Clicking "Create" creates a new record and takes you to a new screen.

Enter data in the non-shaded fields. Note that some fields have been automatically entered. The AIS assigns the next available "Fonds number"; this can be overwritten and a new number manually assigned. "Created by" and "Created date" are automatically entered; both can be overwritten.

Click "Edit" to go to detailing work screens. Click "Cancel" to delete record and return to your original record. Click "Return" to retain new record but return to original record.

The *activity strip* provides options for creating an additional new fonds or collection.

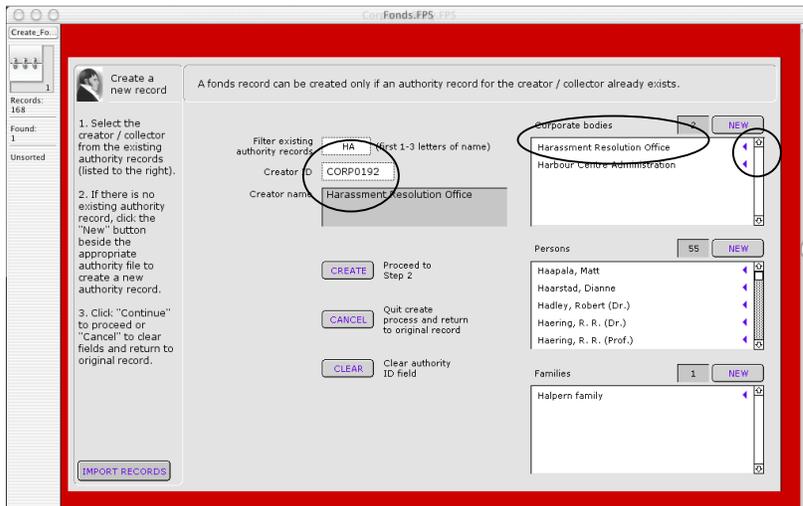
Fonds

The "Create new fonds record" screen requires you to select the related authority record of the fonds creator. If no authority record exists it must be created before creating the fonds record.

Type the first 1-3 letters of name of the record creator in the "Filter existing authority records" field. **Hit the tab key.** Matching authority records for corporate bodies, persons and families will appear in the boxes on the right. The shaded box tells you how many records match.

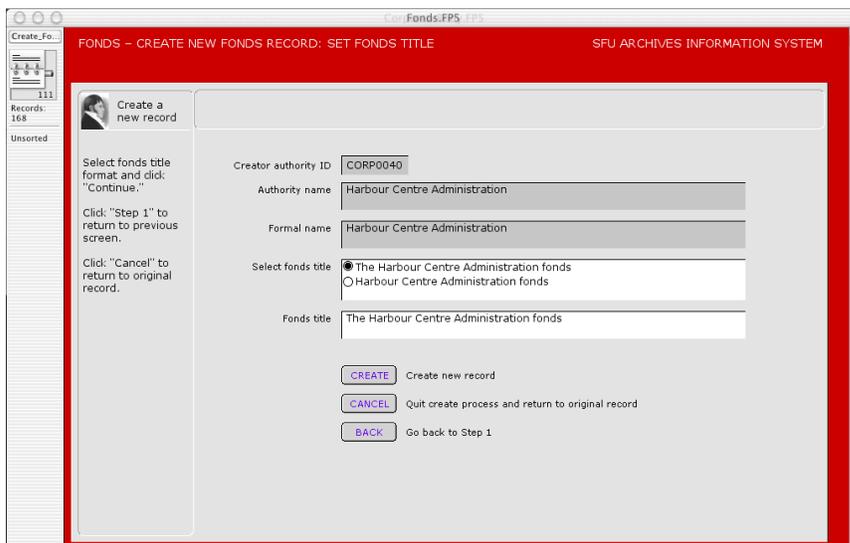
If the required authority record does not appear, it must be created. Click the "New" button beside the appropriate authority file to create a new authority record (see *How-to Guide: Create new authority records*).

If the authority record does appear, click on the name. This will set the "Creator ID" field with the creator's authority ID. To view the detailed authority record, click the blue arrow beside the name.



Click "Create" to continue. Note that the AIS will not allow you to continue if the "Creator ID" field is blank. The AIS will tell you if a fonds already exists for that creator and take you to that fonds record. Click "Cancel" to return to your original record without creating a new record. Click "Clear" to clear fields for re-entering data.

Clicking "Create" will take you to a new screen requiring you to select the fonds title format. Whenever possible select the format that begins with "The"; only select the other format when using "The" would result in an awkward title.



Click "Create" to create the new record. Click "Cancel" to return to your original record without creating a new record. Click "Back" to return to Step 1 to re-select the related authority record.

Clicking "Create" creates a new record and takes you to a new screen.

Enter data in the non-shaded fields. Note that some fields have been automatically entered. The AIS assigns the next available "Fonds number"; this can be overwritten and a new number manually assigned. "Created by" and "Created date" are automatically entered; both can be overwritten.

Click "Edit" to go to detailing work screens. Click "Cancel" to delete record and return to your original record. Click "Return" to retain new record but return to original record.

The *activity strip* provides options for creating an additional new fonds or collection.



AIS HOW-TO GUIDE

January 20, 2003

Create an authority record

Overview

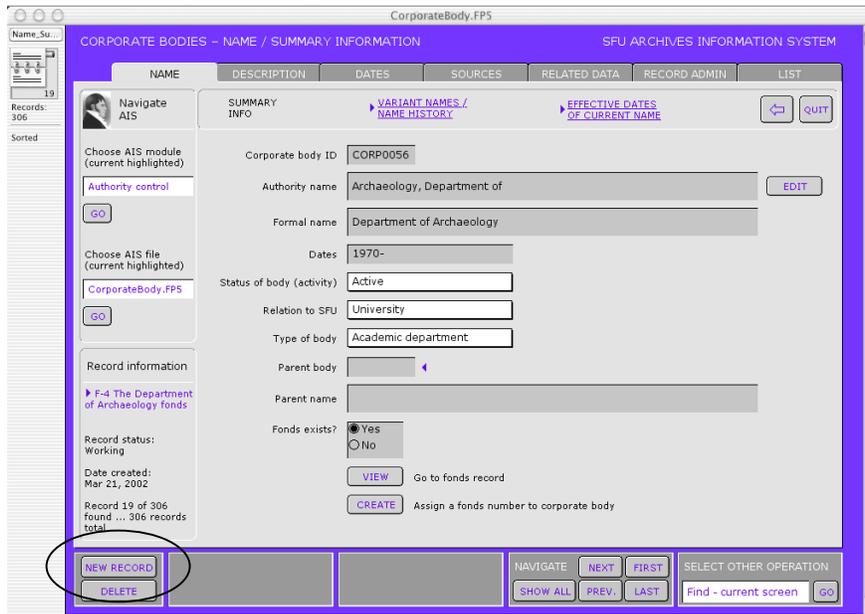
The purpose of an authority record is (1) to establish the authoritative form of an entity's name (corporate body, person or family) that will be used throughout the AIS; and (2) to store descriptive information about that entity which can later be used for administrative histories and biographical sketches. The AIS requires an authority record be established for each fonds-creator before the related fonds record is created.

Initiating a new authority record

The creation of a new authority record can be initiated from either **Fonds.FP5** (during the process of creating a new fonds record) or from with the relevant authority file (**CorporateBody.FP5**, **Person.FP5**, **Family.FP5**).

To create a new authority record **from Fonds.FP5**, you must be in the "Create new fonds record" screen. First check to make sure the authority record does not already exist. Enter the first 1-3 letters of the required name. If it does not appear in the boxes to the right, click the "New" button for the appropriate authority file to create a new record. See *AIS how-to guide: create a new fonds / collection record* for details.

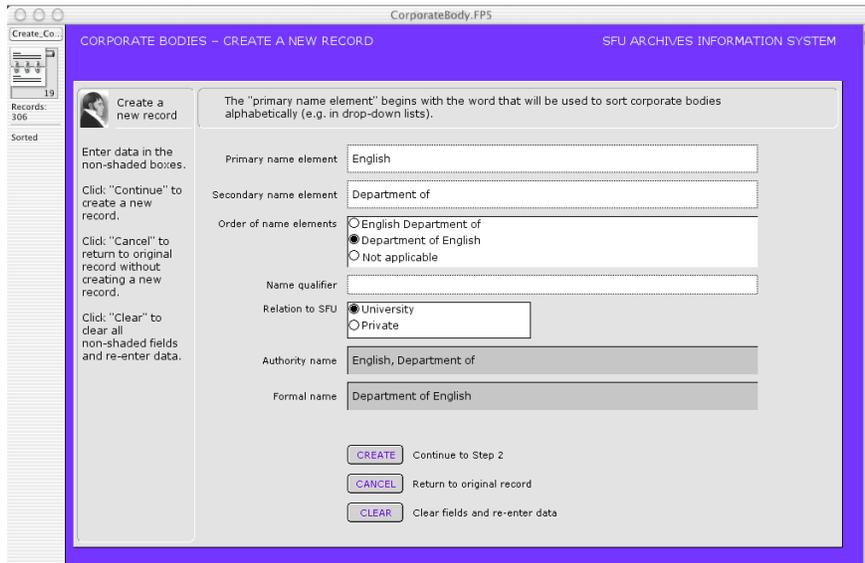
To create a new authority record from within the relevant authority file, click the "New record" button on the activity strip in the lower left-hand corner of the screen.



By either method, you will be taken to a "Create new record" screen.

Corporate body

The "Create new record" screen requires you to complete several fields (non-shaded).



The **primary name element** is the word or group of words that characterizes what is unique to the body or its main function (e.g. "English" is the primary element in the

name "Department of English"). Every corporate body **MUST** have a primary name element.

The **secondary name element** conveys the generic or common aspect in the body's name (e.g. "Department of" is an element found in the name of many bodies). Some corporate bodies may have no secondary name element.

The **order of name elements** determines which element appears first in the formal name of the body (e.g. in the "Department of English" the secondary name element precedes the primary name element). Select the appropriate option. If there is no secondary element, you must select "Not applicable."

Use the **name qualifier** only to differentiate corporate bodies with identical or similar names. Otherwise leave blank. For example, if there were two separate departments called "Department of English" – one in Burnaby, the other in Surrey – use the name qualifier to signify which is intended (e.g. "Burnaby").

Relation to SFU indicates whether the body is a unit of the university or not. Use "Private" for all non-university bodies.

When you have completed data entry, click "Create" to continue to the next screen. Click "Cancel" to terminate creation process and return to original record (no record will be created). Click "Clear" to clear fields for re-entering data.

When you click the "Create" button, the AIS creates a new record in the system, assigns it a unique Corporate Body ID, and takes you to a new screen. The screens for university records and private records differ slightly (the choices for the field "Type of body" are different).

CorporateBody.FPS

CORPORATE BODIES - NEW RECORD CREATED (PRIVATE BODY) SFU ARCHIVES INFORMATION SYSTEM

Create a new record

You have successfully created a new corporate body authority record.

Corporate body ID: CORP032B

Authority name: Fishing, Centre for

Formal name: Centre for Fishing

Type of private body:

- Campus community
- Private sector
- Public sector
- Volunteer sector

Status of body (activity):

- Active
- Defunct
- Not known

Date created: Jan 21, 2003

Created by: Richard Dancy

Sources for name:

EDIT Go to record edit screens

CANCEL Delete record and return to original record

CREATE A RELATED RECORD FONDS Assign a fonds number to this corporate body

CREATE A NEW PERSONAL NAME RECORD NEW CORP Create a new corporate body record.

Records: 397

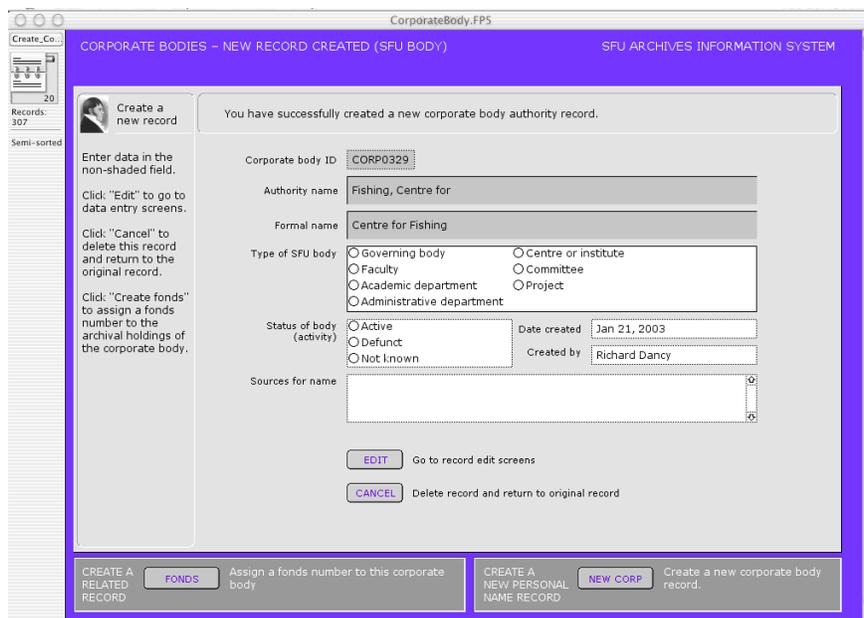
Semi-sorted

Enter data in the non-shaded field.

Click: "Edit" to go to data entry screens.

Click: "Cancel" to delete this record and return to the original record.

Click: "Create fonds" to assign a fonds number to the archival holdings of the corporate body.

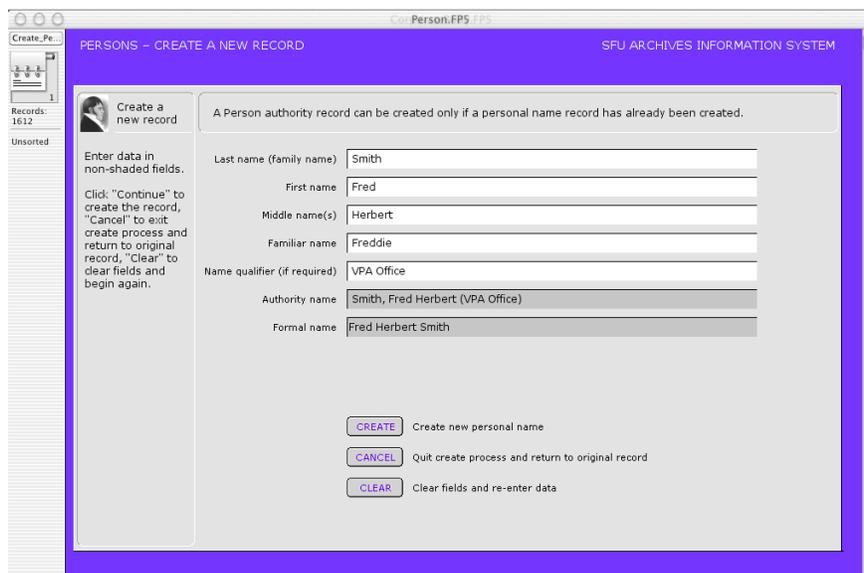


Complete the non-shaded fields. Click "Edit" to view or continue adding data to the record. Click "Cancel" to delete the record you just created.

On the *activity strip*, click "Fonds" to create a fonds record for this corporate body; click "New record" to create a new corporate body record.

Person

The "Create new record" screen requires you to complete several fields (non-shaded).



Enter the person's **family or last** name, the **first name** and the **middle name(s)**. The first and last names **MUST** be completed. The middle name field can take one or more names, initials or can be left blank.

Use **familiar name** if the person was familiarly known as something other than his or her first name; otherwise leave blank.

Use **name qualifier** only to differentiate two persons with the same first, middle and last names; otherwise leave blank. In the example, "VPA Office" is used to indicate that this Fred Herbert Smith works in the VPA's office (as opposed to the other Fred Herbert Smith who works in the English Department).

The **authority name** and **formal name** are automatically calculated from the name elements you have entered. The authority name is the form of the name that will appear in lists (last name appears as the first word).

When you have completed data entry, click "Create" to continue to the next screen. Click "Cancel" to terminate creation process and return to the original record; no new record will be created. Click "Clear" to clear fields for re-entering data.

When you click the "Create" button, the AIS creates a new record in the system, assigns it a unique Person ID, and takes you to a new screen.

PERSONS - NEW RECORD CREATED

SFU ARCHIVES INFORMATION SYSTEM

Create a new record

You have successfully created a new Person authority record.

Person ID: PER1681

Authority name: Smith, Fred Herbert (Dr.) (VPA Office)

Gender: Male Include in formal name? Include in working name?

Honorific: Dr. Dr. Fred Herbert Smith Freddie Smith

Prefix: Mr.

Suffix:

Source(s) for authority name: Department web page.

Created by: Richard Dancy

Date: Jan 21, 2003

EDIT Proceed to data entry

CANCEL Delete record and return to original record

RETURN Return to original record

CREATE A RELATED RECORD FONDS Assign a fonds number to person's holdings

CREATE A NEW PERSON RECORD OFFICER Register person as an officer of a corp body

CREATE A NEW PERSON RECORD NEW PERSON Create a new person record.

Enter data in the non-shaded fields. **Honorific**, **prefix** and **suffix** should be entered if known. These will not appear in the authority name. You have the option of having them appear in the formal name and working name or not; click on the box to set as part of name.

The **working name** is calculated automatically from the data you entered previously and uses the **familiar name** instead of the first name.

Sources for authority name should be entered, but can be left blank. Your name and the current date are automatically entered in the **created by** and **date** fields; these can be overwritten (e.g. if you are working on someone else's computer).

When you have completed data entry, click the "Edit" button to view detailed record or continue entering data. Click "Cancel" to delete the record you have just created and return to the original record. Click "Return" to exit the record and return to your original record.

On the *activity strip*, click "Fonds" to create a fonds record for this person; click "Officer" to create an officer record for this person [this feature is not yet available]; click "New record" to create a new person record.

Family

The "Create new record" screen requires you to complete several fields (non-shaded).

The screenshot shows the 'FAMILIES - CREATE A NEW RECORD' interface. On the left, there is a sidebar with 'Records: 1' and 'Unsorted'. The main area has a title bar 'FAMILIES - CREATE A NEW RECORD' and 'SFU ARCHIVES INFORMATION SYSTEM'. Below the title bar, there is a 'Create a new record' section with a 'Family name for new record' field containing 'Jones' and a 'Name qualifier' field containing 'Burnaby'. Below these fields are three buttons: 'CREATE' (Create new family authority record), 'CANCEL' (Return to original record), and 'CLEAR' (Clear fields). On the right, there is a list of existing entries with a filter box above it. The filter box contains 'Filter families (first 1-3 letters)' and 'VIEW ALL'. The list shows one entry: 'FAM0001 Halpern family'. A red circle highlights the 'VIEW ALL' button.

Enter the **family name**. Use **name qualifier** only to differentiate families with the same name; otherwise leave blank. In the example, "Burnaby" is used as a name qualifier to indicate that this Jones family resides in Burnaby, as opposed to the other Jones family that resides in Surrey.

The box on the right-hand side allows you to view existing family authority records. Enter the first 1-3 letters of the family name and hit the tab key to view matches (matches will not appear until the cursor is out of the filter box); to view all records click

the "All" button. Viewing existing entries ensures that you will not duplicate records and that families with the same names are flagged (and so should be differentiated by the **name qualifier**).

When you have completed data entry, click "Create" to continue to the next screen. Click "Cancel" to terminate creation process and return to the original record; no new record will be created. Click "Clear" to clear fields for re-entering data.

When you click the "Create" button, the AIS creates a new record in the system, assigns it a unique Family ID, and takes you to a new screen.

Sources for authority name should be entered, but can be left blank. Your name and the current date are automatically entered in the **created by** and **date** fields; these can be overwritten (e.g. if you are working on someone else's computer).

When you have completed data entry, click the "Edit" button to view detailed record or continue entering data. Click "Cancel" to delete the record you have just created and return to the original record. Click "Return" to exit the record and return to your original record.

On the *activity strip*, click "Fonds" to create a fonds record for this family; click "New record" to create a new family record.



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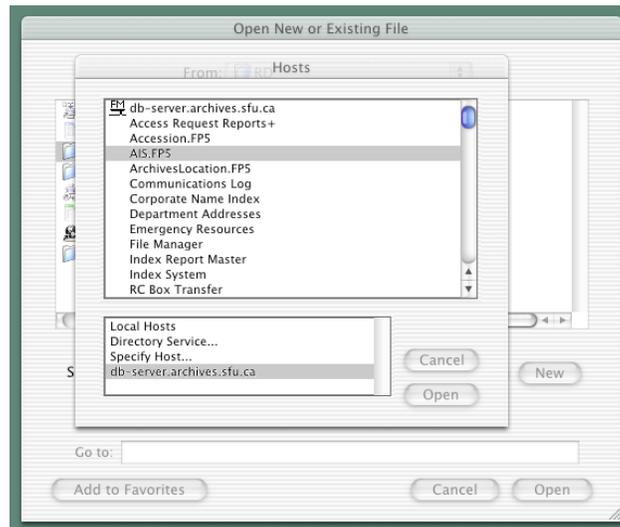
Open / close AIS files

Overview

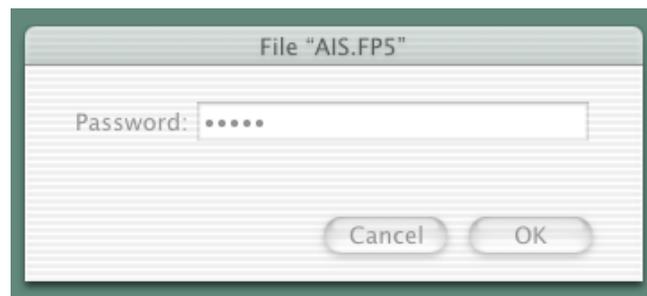
Opening AIS.FP5 automatically opens all required files. Files can be closed individually, as a group by module or all AIS files can be closed simultaneously.

Open AIS

1. Open FileMaker Pro. Select "Hosts"; select host "db-server.archives.sfu.ca"; from list, select "AIS.FP5" and click "Open".



2. Enter password and click "OK". All AIS files will open.

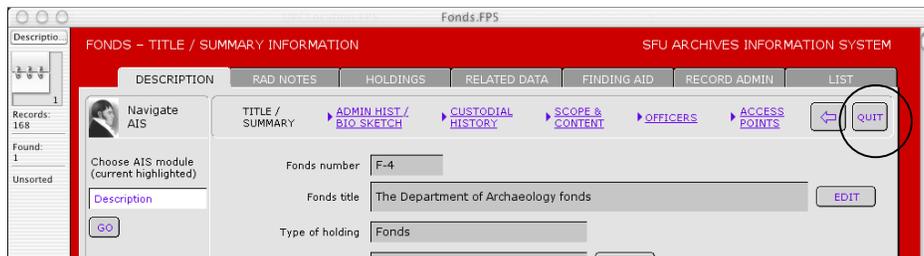


Close AIS files

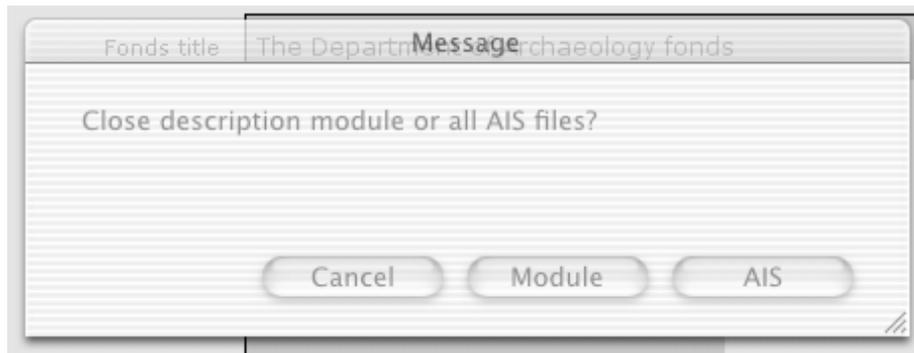
1. To close an **individual file only**: click the close circle in the upper left hand corner.



2. To close a **group of files**, click the "Quit" button in the *sub-tab navigation bar*.



3. In the message box that appears, choose the appropriate selection.



"Module" will close only the core files belonging to the current module (e.g. if you are in the Description module, this will close Fonds.FP5, Series.FP5, File.FP5, and Item.FP5).

"AIS" will close all AIS files.

"Cancel" will return you to your original screen.