January 20, 2003



AIS HOW-TO GUIDE

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).

000	FAIS.FP5S			
Descriptio	AIS HUB - CREATE DESCRIPTIVE RECORDS		SFU ARCHIVES IN	FORMATION SYSTEM
333	VIEW / EDIT RECORDS CREATE RECORDS	SEARCH	STATISTICS	HELP
1 Records: 1 Unsorted	Simon Fraser University Archives and Records Management Department Archives Information Sytem (AIS) Hub		DESCR	IPTION MODULE
	Choose AIS module Create a new record	Ir	nport records	
	(current highlighted) Choose AIS file (current highlighted) AIS FPS GO		▶ <u>Go to Import.FP5</u>	

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.

0	42.58.232.237		Fonds.FP5			
FONDS - TITLE / SU	MMARY INFORMATION			SFL	J ARCHIVES INFORM	ATION SYSTEM
DESCRIPTION	RAD NOTES	HOLDINGS	RELATED DAT	A FINDING AID	RECORD ADMIN	LIST
1 Navigate AIS	TITLE / ADM SUMMARY BIO	IN HIST / SKETCH	▶ CUSTODIAL HISTORY		ICERS POINTS	QUIT
Choose AIS module (current highlighted)	Fonds number	F-4				
GO	Fonds title	Fonds	unient of Archaeolo	gy londs		
Choose AIS file (current highlighted)	Dates range Extent	1966-1986 2.88 m. of	5 textual records	EDIT		
60						
Record information	Type of creator	Corporate	body	_		
Creator: Corporate body CORP0056	Relation to SFU	University				
Record status: Final	Status of fonds (future accruals?)	Open (acc	ruals expected)			
Date created: Jul 29, 2002	Record status	Final		UPDATE		
Record 1 of 1 found 168 records total						
NEW RECORD FIND		GET RECORDS		NAVIGATE NEXT	FIRST SELECT OT	HER OPERATION
DELETE	RDS FILES ITEMS		FILES ITEMS	SHOW ALL PREV.	LAST Find - curre	ent screen GC

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.

Fonds title	The Departm Message rchaeology fonds
Create new r	ecord for fonds or collection?
	Cancel Collection Fonds

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.

0		Corr Fonds:FPS : FPS
FONDS - CF	REATE NEW COLLECTION RECOR	RD SFU ARCHIVES INFORMATION SYSTEM
Creat new r	e a ecord	
	Collection title (formal name)	The Nora and Ted Starling Prize collection Give tile form that you wick to appear on title page of finding aid (triviality hence with The").
	Authority name	Sterling Prize, Nora and Ted COPY Give title form that you wish to appear in alphabetical listings.
	Relation to SFU (university or private)	University
		CREATE Create collection record
		CLEAR Clear title fields
Ļ		

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.

000			Fonds.FP5
Create_Fo	FONDS - NEW REC	ORD CREATED	SFU ARCHIVES INFORMATION SYSTEM
2 Records: 169	Create a new record	You have created a new	v record.
Found: 2 Unsorted		Fonds number	177 F-177
		Fonds title Type of holding	Collection
		Type of creator	None - collector
		Relation to SFU Status (future accruals?)	Private
		RAD note on source of title	۹ ۵
		Created by	Richard Dancy
		Created date	EDIT Proceed to data entry / editing screens
			CANCEL Delete this record RETURN Go back to original record
	2		CREATE A FONDS Create a new fonds record COLLECTION Create a new collection record

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*).

000		Fonds.FP5	
Create_Fo		·	
Records:	Create a new record	A fonds record can be created only if an authority record for	r the creator / collector already exists.
Found: 1 Unsorted	 Select the creator / collector from the existing authority records (listed to the right). If there is no existing authority 	Filter existing authority records HA (first 1-3 letters of name) Creator ID Creator name	Corporate bodies 2 NEW Harassment Resolution Office 4 D Harbour Centre Administration 4
	"New" button beside the appropriate authority file to create a new authority record.	CREATE Proceed to Step 2	Persons 55 NEW Haapala, Matt 4 0 Haarstad, Dianne 4

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

000	Corr Fonds.FP5 /.FP5	
Create a Record: Found: 1. Select the reator / collector from the existing Unsorted	Confends FPS-FPS A fonds record can be created only if an authority record for th Filter existing authority records	ne creator / collector already exists.
(listed to the right). 2. If there is no existing authority record, dick the "New" button beside the appropriate authority file to grante a new authority file to dear the standard of the st	Creator name Harassment desolution Office (CREATE) Proceed to Step 2 (CANCEL) Quiceste process and return to original record (CLEAR) Clear authority ID field	Persons 55 NEW Haapala, Matt Haarstad, Dianne Hadley, Robert (Dr.) Haering, R. R. (Prof.) Families <u>1 NEW</u> Halpern family

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 ackward title.

0		Cor(Fonds:FP5/.FP5	
FONDS - CREATE NE	W FONDS RECORD: SI	ET FONDS TITLE	SFU ARCHIVES INFORMATION SYSTI
Create a new record			
Select fonds title format and click	Creator authority ID	CORP0040	
"Continue."	Authority name	Harbour Centre Administration	
Click "Step 1" to return to previous screen.	Formal name	Harbour Centre Administration	
Click "Cancel" to return to original record.	Select fonds title	The Harbour Centre Administration fo O Harbour Centre Administration fonds	nds
	Fonds title	The Harbour Centre Administration fond	is
		CREATE Create new record	
		CANCEL Quit create process and return	to original record
		BACK Go back to Step 1	

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.

000			CorrFondsEFP5; FP5
Create_Fo	FONDS - NEW REC	ORD CREATED	SFU ARCHIVES INFORMATION SYSTEM
169 Records: 169	Create a new record	You have created a new	w record.
Unsorted		Fonds number Fonds title Type of holding Type of creator Relation to SFU Status (future accruals?) RaD note on source of title Created by Created date	177 F-177 The Harbour Centre Administration fonds Fonds Corporate body University Title of the fonds is based on the name of its creator. Title of the fonds is based on the name of its creator. Richard Dancy Jan 20, 2003 EDIT Proceed to data entry / editing screens CANCEL Delete this record RETURN Go back to original record
			CREATE A FONDS Create a new fonds record NEW RECORD Create a new collection record

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