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).
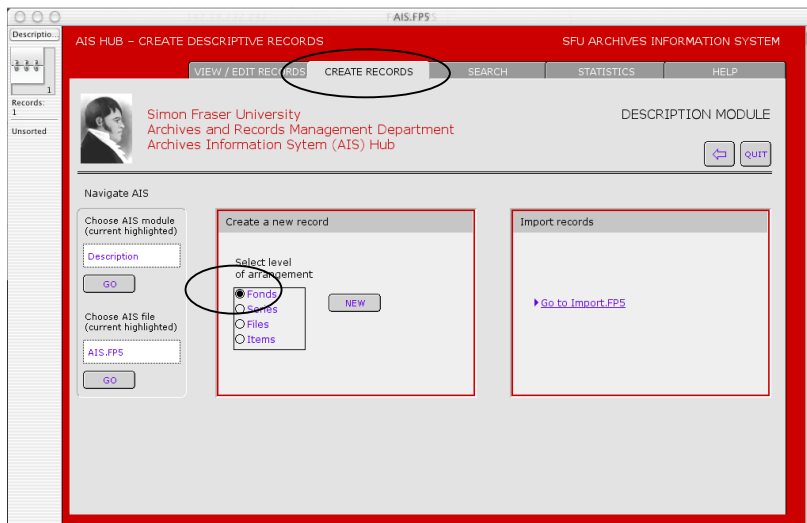

In the "Create a new record" box, select "Fonds" as the level of arrangement and click the "New" button.

To create a new record from **Fonds.FP5**, click the "New record" button on the *activity strip* in the lower left-hand corner.
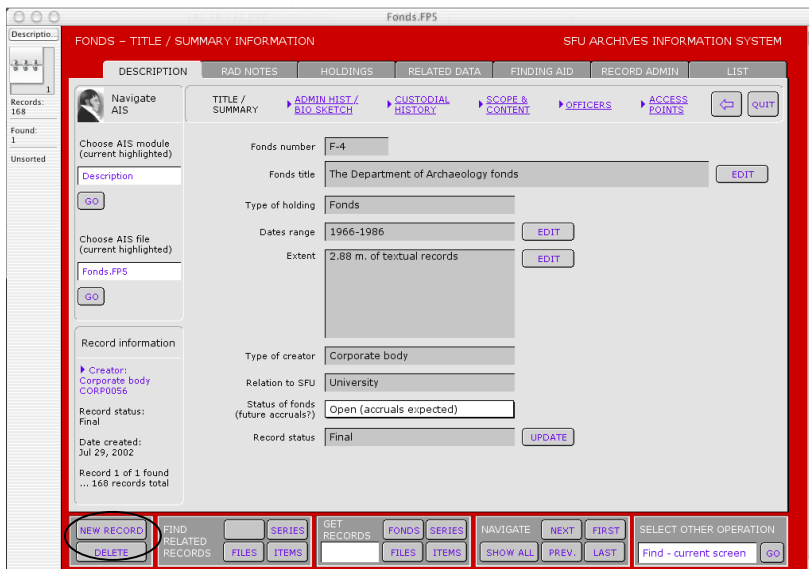
A message box will appear requiring you to indicate whether the new record is for a fonds or a collection; click the appropriate button. "Cancel" will return you to your original record.
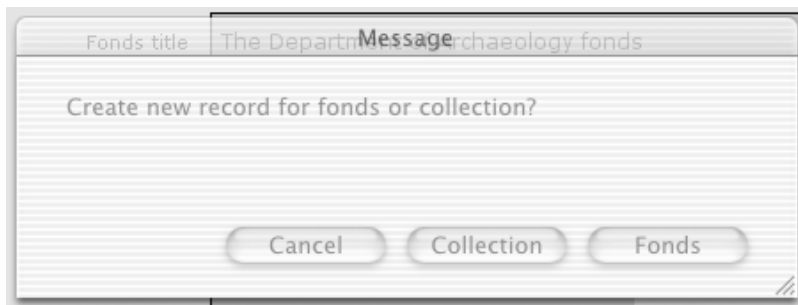
Collection

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.
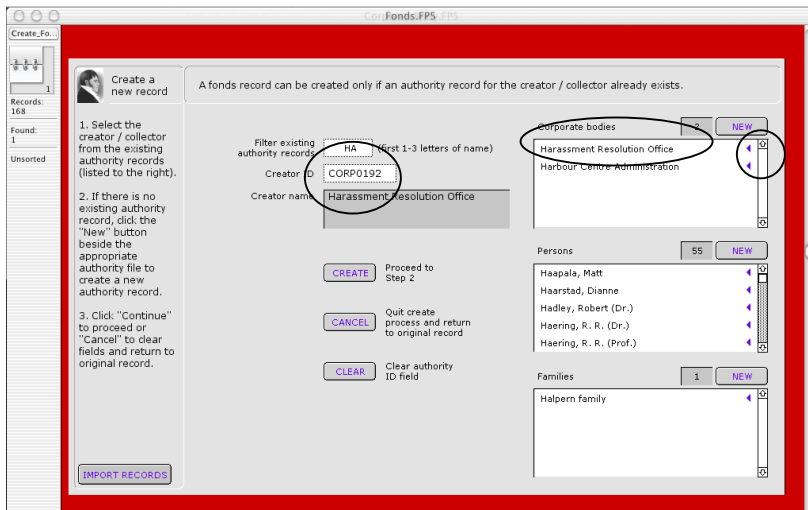
Fonds

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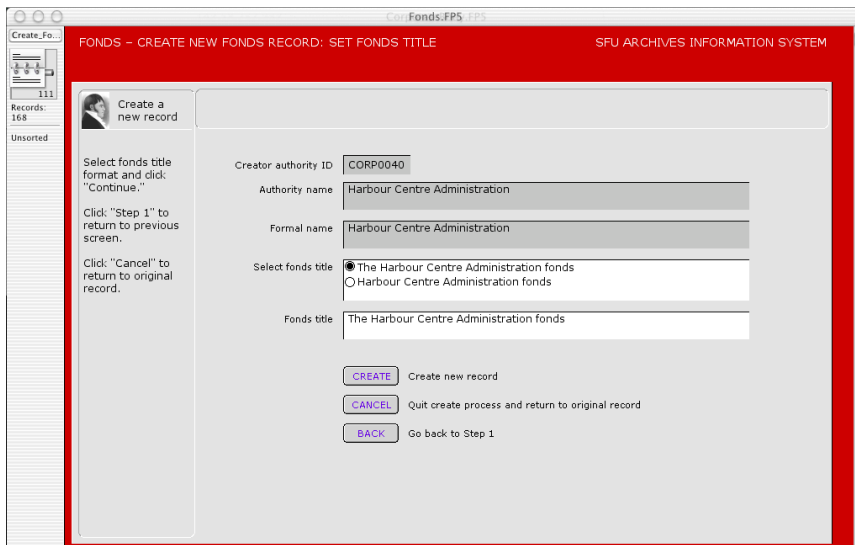
Click "Create" to create the new record. Click "Cancel" to return to your original record without creating a new record. Click "Back" to return to Step 1 to re-select the related authority record.

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.