The Archives Catalog is for cataloging unpublished materials such as documents, manuscripts, oral histories, videotapes, personal papers, maps, and music collections. This chapter will explain how to create data for the various catalog fields. Detailed definitions are provided as we go through the catalog tabs to help clarify the type of entry for each field. As in all the catalogs, you may choose only those fields that are appropriate to the item being cataloged.

The Archives Catalog field names are based on the work of the International Council on Archives (ICA) Ad Hoc Commission on Descriptive Standards. The rules of description for archival material have been detailed in the ISAD(G), International Standard Archival Description (General) document. For more information about the ICA, visit their web site at http://www.ica.org.

Archives may be cataloged as a single item, such as a letter, manuscript, or diary, or as a complex set of documents, such as the complete records of a corporation. This chapter will show you how to catalog large collections of documents, such as corporate records, using multilevel linking. You will also learn how to catalog individual items, such as letters, diaries, original manuscripts, newspaper clippings, receipts, ledger books, and other personal papers.

Here are two definitions that will help you navigate through the field names in the Archives Catalog.

**Unit of Description** - A unit of description may be a single item, a series containing multiple folders, a folder containing multiple documents, or a full set of corporate
records that are treated as a single entity for the purpose of creating a single catalog record.

**Fonds/Collection** - The whole of the documents, regardless of form or extent, created and/or accumulated by a particular person, family, or corporate body in the course of that creator’s activities and functions.

## GETTING STARTED

From the PastPerfect main menu, click on the **Archives** icon to open the Archives Catalog.

If the catalog already contains data, the catalog record that was last viewed will display. If this is the very first object entered, the screen will display blank data fields. Press the **Add** command to begin.

![Add New Archive](image)

Enter your data into the Add New Archive screen and click **Add**. The Archives Catalog screen will appear ready to add information about the item. Complete the entry of information in the top section of the Archives Catalog screen.
THE ARCHIVE SCREEN EXAMINED

The top of the Archives catalog screen is essentially the same as the top portion of other catalogs we have discussed. It contains the Collection Name, Dates, Object ID#, Object Name, Source Information, Dimensions, Location, and Image Management. Unlike the other catalogs, the Description field is called Scope and Content/Abstract and is located in the lower left portion of the catalog screen.

In the middle of the screen on the left hand side you will notice four buttons. These buttons represent the four different screen views available for this catalog; Archive, Map, Music Collection, and Oral History. You may set a default screen view for each catalog record so that whenever you open that particular record the selected screen view appears.

Each type of archive record has a particular set of fields that are needed to catalog that type of item. Therefore, you will probably not use all fields for all archival records. The button for a screen view with populated fields will be green. Unpop-
ulated screen view buttons will remain gray. You should use only the fields that are appropriate for the archival record you are cataloging.

In the center of the screen on the right, you will notice a row of buttons and a row of Tabs. The nine buttons open Additional Information Screens. These screens can be found in all four catalogs and are explained in depth in Chapter 6.

Below the Additional Information Screen buttons, there are six tabs that contain ISAD(G) archival fields. The tabs are: Identity Statement, Context, Structure, Conditions of Access & Use, Allied Material, and Description Control. This chapter will discuss how to enter data for each field. You will also learn how to enter a container list for a catalog record and perform multi-level linking.

In addition, we will discuss how to create Map, Oral History, and Music Collection records.

THE ISAD(G) TABS EXAMINED

Identity Statement Tab

The Identity Statement tab is used to identify and describe the archival material represented by the record. This tab contains the following fields:

Reference Code - The reference code is used to provide a unique identifier for the archival record and to provide a link to the description that represents it. The reference code is made up of three parts; a country code, a repository code, and a specific local object id#. For example: US MnHi P2141. This reference code indicates that the item, P2141, is located at the Minnesota Historical Society in the U.S..

Multi-level Linking - Level of Description - The position of the item in the hierarchy of the fonds or collection. This may be Fonds/Collection, Series, Folder, or Item. This will be explained further on pages 140-143.

Title - A word, phrase, character, or group of characters that names an archival item. When the material bears a formal title, transcribe it exactly as it is worded, ordered and spelled. When generating your own title, use a phrase that reflects function, activity, subject, location, or theme.
Dates of Creation - The actual date or range of dates during which the archival material was created. For example, 1916-1945.

Dates of Accumulation - This date range can be different from the Dates of Creation. It is used to record the period over which the material has been accumulated by a collector.

Extent of the Unit of Description - Use this field to record the number of physical units in Arabic numerals and the unit of measurement. Alternatively, give the linear shelf space or cubic storage space occupied by the archival material. For example: “143 rolls of microfilm, 35 mm.” or “100 cubic feet (65 boxes)”.

The Context Tab

This tab is used to identify the creator of the archival material and place the material in context. This tab contains the following fields:

Name of Creator - Enter the name of the organization or individual responsible for the creation of the material. Notice the File Folder Icon to the right of this field. This indicates that there is a sub-screen available where you may create biographical information about the creator.
Other Creators - Enter the names of any other creators associated with the unit of description. Enter names: Last, First, Middle Initial to facilitate research.

Administrative/Biographical History - Provide a history of the corporation, or a biography of the creator of the archival material. This will help place the material in context. Record any significant information on the origin, progress, development, and work of the corporation or on the life and work of the creator of the material.

Archival History - Record the successive transfers of ownership, responsibility and/or custody on the unit of description. Indicate any actions, such as history of arrangement, creation of finding aids, re-use, software migration or reorganization of records that have resulted in its present structure and arrangement.
The Structure Tab

This tab provides information about future additions to or destruction of materials, and a guide to the arrangement of the materials.

**Figure 8-5** Archives Structure Tab

**Appraisal, Destruction, and Scheduling Information** - Enter information on any appraisal, destruction, or scheduling action taken. Where appropriate, record the authority by which the action has been taken. Example: “This item is to be kept permanently in the PastPerfect Museum Archives. The item shall be appraised every ten years for insurance purposes.”

**Disposition** - Enter the type of disposition planned for this record, such as “Return to creator” or “Destroy”.

**Disposition Date** - Enter the date of disposition.

**Accruals** - Detail any possible changes in the extent of the materials or item. Indicate if future accruals, additional transfers, or deposits are expected. Where appropriate, give an estimate of their quantity and frequency. This field applies to the cataloging of corporate records.

**System of Arrangement** - Enter information in this field about the arrangement of the material. Specify the order of the material and, if appropriate, how these have been altered by the archivist.
The Conditions of Access Tab

This tab contains fields that are designed to record the legal status of the materials and to outline conditions under which the material may be used or reproduced.

**Conditions Governing Access** - Identify any conditions that restrict or affect access to the item. Indicate the extent of the period of restriction and the date at which the material will open. Example: “Family correspondence closed until 2010.”

**Conditions Governing Reproduction** - Identify any restrictions on the use or reproduction of the material. If the conditions governing the use, reproduction, or publication of the material are unknown, or if there are no conditions, then no statement is necessary.

**Language of Material** - Record the predominant language of the materials comprising the item.

**Physical Characteristics** - Indicate any important physical details and any permanent physical condition of the material that limits its use.

**Finding Aids** - Give information about any finding aids that the repository may have that provide information relating to the item. If appropriate, include information on where to obtain a copy. Example: “See: Guide to Historical Document Holdings in Spokane County. 1999.”
The Allied Materials Tab

This tab provides fields for recording information about the location of the original item and any information about the existence of copies or other materials that are related and that may be held in other repositories.

**Existence and Location of Originals** - If the item is a reproduction and another repository holds the originals, record the name of the other repository. Also give any identifying numbers and other information that may help in locating the original material. If the originals no longer exist, give that information.

**Existence and location of Copies** - If the item is available in another format, record the formats together with any significant object ID numbers and the location where they may be found. Example: “Photocopies available for researchers. File Cabinet 4 Drawer 2.”

**Related Units of Description in this repository** - Use this field to identify related items in the same repository. If the item consists of material that has a direct and significant connection to another item in your repository, indicate the relationship. For example: “See also 2004.1.1-War Ration Book.”

**Associated Material in Other Repositories** - If there is any material in another repository that has a relationship by provenance to the material, provide informa-
tion about the associated items and their repository. Example: “See Catalog #85.1.2-Cheney Museum of History. Photo of Hanley, Waren T.”

Description Control Tab

Archivist Name - Record the name of the archivist who is primarily responsible for cataloging and describing the unit of description. This field is controlled by the Experts Authority File. To view more information about this expert, click on the File Folder Icon to the right of the field.

Archivist’s Notes - Explain how the description was prepared.

Rules or Conventions - Identify the international, national, and/or local rules or conventions followed in preparing the description.

Date(s) of Description - Indicate when this description was prepared and/or revised.

Restricting access to selected sub-screens

Some museums may not want to use all four screen views of the Archives catalog screen. To hide selected views, go to the main menu and select Setup. From the flyup menu choose Security. On the Security screen, place a check mark next to the name of any screen view you wish to hide.
THE CONTAINER LIST

Use the Container List when cataloging an archival record that contains multiple items. The Container List may be used when cataloging all the folders in an a document box or all the items contained in a folder.

To add a new item to the Container List, press the Container List command button and then press Add, Edit, View Details command. Enter information in the Container, Folder, Location, Creator, Title, Subjects, and Description fields. Click Save when finished. To change the sort order of the Container List, select the desired order from the Sort by pull down menu. Items can be sorted by Container, Folder, Title, or the order they were entered.

SEARCHING THE CONTAINER LIST

You may perform searches on the contents of the container list using the Query command function. The Query function allows you to search any field or combination of fields using a variety of conditions. The Query function is discussed
in detail in *Chapter 14 Research*. Press the **Query** command at the top of the Archives Catalog screen to begin a search of the Container List. You may search up to seven fields simultaneously using either the “and” or “or” operator to narrow or expand the search. Select the fields from the field pull-down lists and then select a condition from the condition pull-down lists.

![Figure 8-10 Container List search through the Query screen](image)

To begin the search, click on the Container List radio button.

Select the container list field you wish to search from the pull-down menu.

Select the condition statement from the condition pull-down menu.

To save a query, press the **Save Query** command button. You may retrieve and rerun the saved query at any time.

**MULTI-LEVEL LINKING**

For many historical societies and small museums, the item and folder level with container list are enough to catalog most archival materials. However, for large collections of corporate documents or a collection of personal papers, you may want to use the multilevel linking capability built into PastPerfect. This allows you to link collection records together in a hierarchical system from the general to the specific. Separate records can be entered for each level of description: fonds/collection, series, folder, or item.

A **fonds/collection** is defined by the ICA as the whole of the documents, regardless of form or medium, organically created and/or accumulated and used by a person, family, or corporate body in the course of the creator’s activities and function.
A **series** is defined as documents arranged in accordance with a filing system or maintained as a unit because they result from the same accumulation or filing process. For example, in a collection of corporate documents, the minutes of board of directors meetings arranged in folders by year could be considered a series.

Let’s catalog a parent record for the Hanley Family Collection personal papers. The Parent Record encompasses the whole collection, briefly describing all the items contained in the fonds.

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**Figure 8-11**

Archive parent record

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At the Fonds Level, the Scope and Content field contains a brief description of all the items in the collection.

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Next, enter the Series Level records as shown in Figure 8-12, that you wish to link to the parent record. Once the record for the series has been created, you can link it to the parent record by clicking the **View/Setup Links** command button on the Series screen and entering the fonds/collection object ID as the parent object ID. You may enter any number of series records and link them to the same parent record.
The next step is to enter separate records for each item that you wish to link to the series. The items can then be linked to the series using the View/Setup Links command button and entering the series object ID as the parent.

PastPerfect does not require you to provide all levels of data. In some cases, you may need to enter a record only for the fonds and records for the associated items, linking the items directly to the fonds, without a series. You can also enter a single record for the fonds without series or items, or you can enter items without an associated fonds or series.
Multilevel linking allows you to create hierarchical document cataloging, in compliance with ICA standards and using the rules of description as documented in the ISAD(G) manual.

Remember, when cataloging with multilevel linking, you do not have to repeat information in lower levels that you have already entered in the higher level. You will save time in cataloging by starting with the fonds/collection level and working your way down through series, folders, and items.

THE MAP SCREEN VIEW

The Map tab allows you to catalog maps in your collection. This tab contains specialized fields required for these items. The field names and field descriptions are derived from Guide for a Small Map Collection, by Barbara E. Farrell (Association of Canadian Map Libraries, Ottawa, Ontario, 1984).

Enter information into the Map screen view fields.

Figure 8-14
Map Screen View

Area/Region - Use this to enter the name of the area or region covered by the map being cataloged.
**Projection** - Enter the type of projection used in the map being cataloged. It is impossible to transfer information from a sphere to a flat surface without distortion. On maps that include enough of the earth’s surface for the curvature to be significant, the properties of distance, angular measurement, area, and shape must in some way be distorted. Projections have been devised to preserve a specific property or combination of properties. An example of a projection is the Mercator Projection.

**Insets** - An inset is a small map or illustration set within a larger map. For example, a map of the state of Maryland may have an inset of the city of Baltimore.

**Size** - Use this field to record the size of the map being cataloged. This is usually expressed as in this example: 24” x 36.”

**Number of Sheets** - This field is used to record the number of sheets that comprise the map being cataloged.

**Medium** - This field is used to list all media from which a map is made. You may choose to record a single entry such as “Paper” or “Vellum.” However, you have the option to choose several entries separated by forward slashes, as in “Paper/Watercolor.” Record multiple entries in descending order of percentage of composition. This field is controlled by an authority file from which you may choose predefined media types.

**Latitude** - Use the Latitude fields to record the angular distance north or south of the earth’s equator measured in degrees along a meridian. North Latitude describes the northern boundary of the map. South Latitude describes the southern boundary of the map.

**Longitude** - Use the Longitude fields to record the angular distance on the earth’s surface east or west from the Prime Meridian, expressed in degrees, minutes and seconds. East Longitude describes the eastern boundary of the map. West Longitude describes the western boundary of the map.

**Scale** - Scale refers to the proportion used in determining the dimensional relationship between map distance and ground distance. For example, if one inch on the map represents 50,000 inches on the ground, the scale can be expressed as 1 to 50,000, or 1:50,000. This is called the representative fraction. Use the Scale field to record the scale of the map.
**Prime Meridian** - Prime Meridian is the zero meridian used as a reference line from which longitude east and west is measured. It passes through Greenwich, England. The Prime Meridian at Greenwich is accepted as such by international convention (1884). Many maps produced in non-English-speaking nations may have numbering systems based on other meridians, such as the meridian of Ferro Island or the Paris meridian. Use the Prime Meridian field to record the Prime Meridian for the map being cataloged.

**THE MUSIC COLLECTION SCREEN VIEW**

The Music Collection Screen View provides a comprehensive database program for cataloging music collections within PastPerfect. This screen view allows you to create and track information about music recordings including: album title, primary artist, group name, genre, instruments, and other artists. You may also create a complete track list for each recording that includes: track number and track length, song title, composer, up to ten individual artists and their associated instruments, orchestra, and conductor for each track. As with cataloging any item in PastPerfect, you should enter data only in the fields needed to accomplish your cataloging goal.

To catalog a music collection item begin by adding a new catalog record as explained in Chapter 6. Enter information at the top of the screen for Collection, Object Id#, Object name, Dates, etc. Next select the radio button for Music Collection in the center left of the screen and press Save. This will reveal the music fields and set the default screen view for the catalog record to Music Collection.

Press the Edit command button and enter data in the music fields. The lower part of the Music screen contains the following specialized fields:
**Scope and Content/Abstract** - Use this field to describe the album, tape, or CD. Record subject matter and the form of the item to enable users to judge its potential relevance. Give a brief summary of the content. This is an unlimited field, so the entry may be as long as you like.

**Genre** - Genre refers to a category of music composition marked by a distinctive style, form, or content. This field is controlled by an authority file. To enter the Genre, press F7 or click your Right Mouse button to access the Authority File. Double click on the highlighted entry to populate the genre field. You may add, edit, or delete entries in the authority file from this screen or you may go to Setup | Authority Files. Highlight “Genre” and press the Next > command button at the top of the screen. You may Add, Edit, or Delete entries.

**Recording label** - Use this field to list the record company name, if applicable.
Recording media - Enter the media upon which the music is recorded. This field is controlled by a pull down authority file. Click on the down arrow on the right of the field to reveal the choices.

Figure 8-17
Right side of music fields

Album Title - Enter the title or name of the compact disc, record album, or recording.

Group - Enter the name of the group, band, or ensemble responsible for creating the music.

Primary Artist - Enter the name of the individual who is primarily responsible for the content of the music.

Instrument - Enter the instrument(s) played by the individual who is primarily responsible for the content of the music.

Other Artists & Instruments - Enter any other artists and their instruments who are responsible for the content of the music.

Track List
The lower portion of the screen contains the Track List for the recording. The track list contains the following fields: Track, Length, Song Title, Composer, Artist 1-10, Instrument 1-10, Conductor and Orchestra. To add a new track, click on the Add/Edit Track List command button.
If your PastPerfect system is equipped with the optional Multi-media Upgrade, you may create links to audio files that allow you to play music files while you are viewing the PastPerfect record. These audio files may be stored either on your hard drive or on other removable media. For details about multi-media links, see Chapter 19, Multi-media.

Searching the Track List

You may perform searches on the contents of the track list by using the Query command function. The Query function allows you to search any field or combination of fields using a variety of conditions. The Query function is discussed in detail in Chapter 14, Research. Press the Query command at the top of the Archives Catalog screen and click the “Music Track List” radio button to begin a search of the track list. You may search up to seven fields simultaneously using either the “and” or “or” operator to narrow or expand the search. Select the fields from the field pull-down lists and then select a condition from the condition pull down lists.

To save a query, press the Save Query command button. You may retrieve and rerun the saved query at any time.
Oral history interviews can be an important part of local history. They offer vibrant first-hand accounts of historic events both big and small. They are an excellent way to collect primary source information about people, events, communities, and social changes in both private and public affairs. Many oral histories are stored on tape or other media. The PastPerfect Oral History Screen View contains the fields and forms necessary for cataloging oral histories.

Select the radio button for Oral History to set the catalog record’s default view and reveal the oral history cataloging fields. This screen contains all the fields needed to catalog an oral history record, including:

**Scope and Content / Abstract** - Use this field to describe the oral history. Record subject matter and the form of the item to enable users to judge its potential relevance. Give a brief summary of the content. This is an unlimited field so the entry may be as long as you like.

**Restrictions** - Enter any restrictions that may apply to the use of the oral history interview tapes, transcripts, or other facsimiles of the oral history interview.
**Narrator’s Name** - The narrator is the person being interviewed. This field may be linked to a contact record. Enter the narrator’s Contact Id# in the Id# field to the right of the name. To jump to the Contact record, click on the File Folder Icon to the right of the field.

**Interviewer** - Enter the name of the person who conducted the oral history interview. This field is controlled by the Experts authority file. To access the file, press F7 or click the right mouse button. To add, edit, or delete entries in the authority file use the buttons at the top of the screen. For more information about the expert, click on the File Folder Icon to the right of the field.

**Interview Place** - Enter information about where the interview took place.

**Length of Interview** - Enter the length of the interview in hours and minutes.

**View/Print Donor Release Form** - It is important for the subject of the interview to understand that the information contained in the oral history interview may be published or broadcast for various purposes. Having the narrator review and sign the Oral History Release Form will help clarify the legal conditions governing the use of the oral history.

**Transcriptionist** - Enter the name of the person who transcribed the oral history interview. This field is controlled by the Experts authority file. To access the file press F7 or click the right mouse button. To add, edit, or delete entries in the authority file, use the buttons at the top of the screen. For more information about the expert, click on the file folder icon to the right of the field.
**Transcript Location** - Enter the location of the transcript of the oral history interview.

**Transcription Date** - Enter the date of the transcription.

**Transcript Reviewed** - Enter the date that the narrator reviewed and approved of the transcript of the oral history interview.

**Recording Media** - Enter the type of media upon which the original recording was made. This field is controlled by a pull-down authority file. To access the authority file, click on the down arrow to the right of the field. Click on your highlighted choice.

**Media Quantity** - Indicate how many videotapes, cassettes, reels, or other media are part of the oral history being described.

**Oral History Recording List** - To add, edit, or delete entries on the Oral History Recording List, press the Add/Edit Recording List command button.

If your PastPerfect system is equipped with the optional Multi-media Upgrade, you may create links to audio files that allow you to play the audio while you are viewing the PastPerfect record. These audio files may be stored either on your hard drive or on other removable media. For details about multi-media links, see Chapter 19, Multi Media.
Searching the Recording List

You may perform searches on the contents of the recording list using the **Query** command function. The **Query** function allows you to search any field or combination of fields using a variety of conditions. The Query function is discussed in detail in *Chapter 14, Research*. Press the **Query** command at the top of the Archives Catalog screen and click the “Oral History Recordings” radio button to begin a search of the recording list. You may search up to seven fields simultaneously using either the “and” or “or” operator to narrow or expand the search. Select the fields from the field pull-down lists and then select a condition from the condition pull-down lists.

To save a query, press the **Save Query** command button. You may retrieve and rerun the saved query at any time.