Eastern Townships Archives Portal User Manual

Prepared by the Eastern Townships Resource Centre

This document is intended as a user guide for the staff and volunteers of member institutions of the Eastern Townships Archives Portal.

2019

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Introduction

Welcome! The *Eastern Townships Archives Portal* (ETAP) was launched in 2016 as a multilingual, multi-repository online archives management database for institutions situated in the geographic area known historically as the Eastern Townships of Quebec. Funding for the establishment of the database was received from Library and Archives Canada and the project is headed by the Eastern Townships Resource Centre (ETRC).

ETAP runs on AtoM, for Access to Memory, which is open source web-based software first developed by the International Council on Archives and now continues to be supported by Artefactual Solutions. AtoM is designed to adhere to international and national standards of archives management. It consists primarily of the following three types of records:

- Archival descriptions: based on the Canadian Council of Archives' *[Rules for Archival Description](#)* (RAD)
- Authority records: based on the International Council on Archives' *International [Standard Archival Authority Record for Corporate Bodies, Persons and Families](#)* (ISAAR-CPF)
- Archival institutions: based on the International Council on Archives' *[International Standards for Describing Institutions with Archival Holdings](#)* (ISDIAH)

The establishment of ETAP puts into place an invaluable resource for Eastern Townships' historical societies and archives repositories as it facilitates these organizations' alignment with national and international archival descriptive standards. The database also simplifies the sharing of digital images, documents, audio and video with researchers. Several provincial databases use AtoM software, along with numerous large international institutions, which facilitates the sharing of descriptions.

Institutions using ETAP are responsible for ensuring that the content they contribute to the database adheres to the descriptive standards appropriate to each type of record. Members are charged an annual fee to participate in the database, which includes 1GB of storage. Additional storage is available for members at rate of $13.00/GB per year, plus applicable taxes (storage rates are set by the hosting company and are subject to change).

For more detailed guidelines and instructions on how to use AtoM beyond what has been included in this manual, please visit Artefactual's online documentation page: https://www.accesstomemory.org/en/docs/2.4/

General Guidelines

There are some fields designated as required fields by the AtoM software and, in some cases, additional fields have been designated as required for ETAP. The mandatory fields for archival

institutions, authority records, and archival descriptions for ETAP have been marked with **[Required]** in this manual.

Logging In

Authorized users of ETAP will be given a password linked to their email account, which they will use to log in by clicking on the "Log in" button on the top right corner of the ETAP homepage. User accounts are created and managed by the ETRC in consultation with member institutions.

Archival Institution Description

The Archival Institution record contains information on your institution, such as contact information, scope of activities, opening hours, and rates. Each archival description provided by your institution will be accompanied by your institution's logo and will link to this information.   For this reason, it is important to keep the information up-to-date with regards to any significant changes.

View or edit an existing archival institution description:

1. Log on to the site using your email address and password.
2. Select Archival Institutions in the Browse menu (found on the upper left side of the home page)
3. Select your institution from the results or you can search for your archival institution using the "Search Archival Institution" box
4. Click on your institution's name to view the full record
5. If you wish to change any information, click on the "edit" button at the bottom of the page

Customizing Your Institution's Pages

AtoM allows for institutions to customize the theme of their own pages in a multi-repository setting. There are five ways that institutions can customize their pages: add a logo, change the background colour, add a banner, add a custom description, and add a map. Below you will find instructions on how to adjust four of the customizable options.

*Please note: You can quit the theming process at any time by clicking the "Cancel" button and any changes made will not be saved. Simply navigating away from the page by any other means, **without first clicking "Save,"** will also result in no changes being saved to the archival institution.

➢ Getting started
   1. Select your institution from among the list of archival institutions. Clicking on your institution will take you to the edit page.
   2. Click on the "Edit Theme" button, found at the bottom of your institution's edit page.
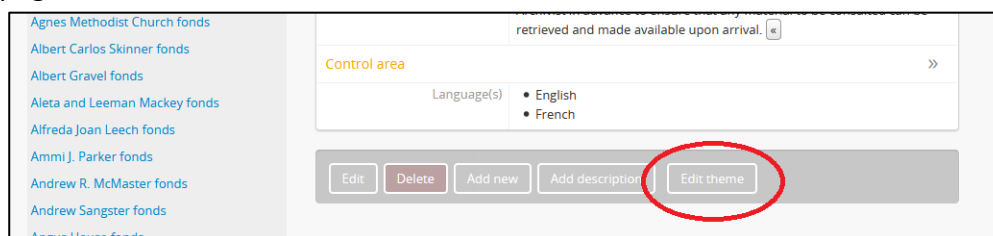
   3. AtoM will reload the institution's theme edit page. From here, logged-in users can change the background color, upload a logo and/or banner, and add custom content.

- ➢ Add a logo
    1. In the "Style" area, under the "Logo" field, click on the "Browse" button.
    2. In the new window that pops up, select the image from your computer that you wish to add as the logo for your institution. Logo format notes: the image must be in PNG format, must not be larger than 256KB in size and the dimensions should be between 200x200 and 270x270 pixels. Images not meeting these requirements will result in either an error message or will be cropped to meet the appropriate dimensions.
    3. When you have selected your logo, click "Save" in the button block at the bottom of the page. AtoM will reload the archival institution in view mode, where you can review the logo.
    4. If you are not happy with the appearance of the logo, or to change an existing logo, follow the steps above to replace the previously uploaded logo with a new image by checking the box next to "Remove the current file," located below the existing logo. Note: You must refresh your web browser page to see changes made. Your logo will appear in the top left side of the page for the archival institution description as well as on all archival description records that are associated with your institution.
- ➢ Change the background colour
    1. In the "Style" area, click on the "Background color" from the drop-down menu that appears.
    2. Select the colour you would like to use as the background for your archival institution record. This colour will also appear as the background colour for all archival description records that are associated with your institution.
    3. When you have selected your new background colour, click "Save" in the button block at the bottom of the page. AtoM will reload the archival institution into view mode, at which time you can verify how the colour looks on the display page. Also check to make sure the colour chosen does not make texts, hyperlinks, etc. more difficult to for users to read. Repeat the previous steps until you are satisfied with the colour selection.
- ➢ Add a banner
    1. In the "Style" area, under the "Banner" field, click on the "Browse" button.
    2. In the new window that pops up, select the image from your computer that you wish to add as the banner for your institution. Banner format notes: the image must be in PNG format, must not be larger than 256KB in size, and the dimensions should be between 100 and 300 pixels in height and should not exceed 800 pixels. Images not meeting these requirements will either result in an error message or will be cropped to meet the appropriate dimensions.

3. When you have selected your banner, click "Save" in the button block at the bottom of the page. AtoM will reload the archival institution in view mode, where you can review the how the banner displays on the page.
4. If you are not happy with the appearance of the banner, or wish to change an existing banner, follow the above steps to replace the previously uploaded banner with a new image and by checking the box next to "Remove the current file," located below the existing image. <u>Note:</u> You must refresh your web browser page to see changes made. Your banner will appear across the top of the page for your archival institution's description. It will NOT on the archival description records that are associated with your institution.

➢ Add a custom description
Users can also add custom HTML and in line CSS to an archival institution page, to further customize its content and display. This can be used to add important information (e.g. holiday hours; emergency closures) either temporarily or permanently; to embed external content such as a YouTube video or a locally hosted image; to add shortcuts to custom searches; and more.

To Add a New Archival Institution or Edit an Existing Institution

<u>To Add:</u> Click on the add button, represented by   (found on the upper right side of the home page), and click "archival institution."

<u>To Edit:</u> Select your institution from among the list of archival institutions. Clicking on your institution will take you to the edit page.

Within the "Edit Archival Institution" area, there are seven categories of information that permit a very detailed description of the institution, but only some are required. Below is a description of the information, and identification of required fields, for each of the categories in this section. For reference, the associated rule from ISDIAH is also indicated in parentheses beside each category.

Identity area (ISDIAH 5.1)

Identifier **[Required]**	A unique code created by the ETRC in consultation with archival institutions used to identify individual institutions.
Authorized form(s) of name **[Required]**	The official name of the repository.

Parallel form(s) of name	Parallel forms of the name of the repository (such as French-language version of your institution's name).
Other form(s) of name	Any other form(s) of the institution's name, such as acronyms and changes in the name over time (including dates, if possible).
Type	Choose from a list of different types of repositories.

Contact Area (ISDIAH 5.2) [REQUIRED]

This area contains all contact information for your institution. To edit existing contact records, click on the pencil icon next to the listed contact person you wish to edit and enter the appropriate information into the pop-up window with the various information fields. While it is not necessary to list a name in the "contact person" field of the contact information, please note that the category will appear blank when you are in the edit page of your institution (all of the other information will remain available, but the listing in the edit "contact area" will be without title). Alternatively, you may choose to list only a title, for example "Archivist."

Description Area (ISDIAH 5.3)

History	Information about the history of your institution.
Geographical and cultural context	Geographical area in which your institution is situated.
Mandates/sources of authority	Record any documents or laws that act as a source of authority for your institution.
Administrative Structure	Describe the administrative structure of your institution, in narrative form or using organizational charts.
Records management/collecting policies	Describe the records management, collections or acquisition policies of your institution.
Archival and other holdings	Brief description of your institution's holdings, can include information about the volume of holdings, media formats, thematic coverage, etc.
Finding aids, guides & publications	Record title and other details of pertinent published and/or unpublished finding aids or guides prepared by your institution.

Access Area (ISDIAH 5.4)

Opening times **[Required]**	List the opening hours for your institution as well as planned closures (such as holidays or seasonal shut-downs).
Conditions and requirements	Describe access policies, including any restrictions or regulations regarding the use of the materials and facilities.
Accessibility	Provide details about your institution and buildings relevant for users with disabilities.

Services Area (ISDIAH 5.5)

Research services	Information about onsite services provided to researchers (ex. languages spoken, research and consultation rooms, etc.). You can also record information about available research services, applicable fees, etc.
Reproduction services	Information about reproduction services available to the public (microfilm readers, photocopies, photographs, digital copies), and the general conditions and restrictions to these services, if applicable.
Public areas	Includes information about services available in public areas of your institution (places to eat, exhibitions, ATMs, Wi-Fi, etc.).

Control Area (ISDIAH 5.5)
These fields are optional.

Archival Descriptions

This section is used for describing the fonds and collections held by your institution.

The "Archival Description" area consists of headings largely corresponding to the *Rules for Archival Description* (where applicable, and to aid member institutions with in-house software from the United States, the corresponding rule in DACS, *Describing Archives: A Content Standard,* has been identified). Clicking on the heading expands the description section to view the fields related to that section. **Note that not all fields need to be filled out in order for the archival description to be compliant with RAD.** It is not necessary to complete the description in one sitting: save your work by clicking the "Create" button. You may return to complete the description at any time. The archival description will remain in draft form, and not visible to public users, until you have changed the publication status to "Published."

Add/Edit Archival Descriptions

To edit an existing description: after you have logged in as an administrator, use the search box to find the appropriate description, and click on the title to go to the page with the full description. Click on the "Edit" button at the bottom of the screen, which will take you to the edit page. Select the area you wish to edit from the headings available.

To add a new archival description: Before adding a new archival description, the related authority record must have already been created (see section on Authority Records for instructions). Begin by clicking on the "Add" button represented by (found on the upper right side of the home page), and click "Archival Description."

*Please note: You can quit the editing of archival descriptions at any time by clicking the "Cancel" button and any changes made will not be saved. Simply navigating away from the page by any other means, **without first clicking "Save,"** will also result in no changes being saved to the archival description. Because the AtoM software will log inactive users out automatically, be sure to save your work frequently.

Title and Statement of Responsibility Area (RAD 1.1B)

Title proper **[Required]** (RAD 1.1B/DACS 2.3)	Enter the name of the person, family or corporate body responsible for the creation of the records, followed by "fonds" or "collection." Examples: Herbert Derick collection, Sherbrooke County Women's Christian Temperance Union fonds.
General Material Designation (RAD 1.1C)	Select the General Material Designation at the highest level of description from the drop-down list. Ex. textual record, graphic material, etc.
Parallel titles and other title information	Use if applicable. Ex. The form of an organization's name in another language.
Statement of responsibility (RAD 1.1F)	Used for item-level description only.

Title notes (RAD 1.8B2)	Select "Source of Title Proper" from the drop-down list and fill in as appropriate. Ex. "Title based on contents of fonds," "Title based on contents of image."
Level of description **[Required]**	Select the appropriate level of description from the drop-down menu. Ex. fonds, collections, series, subseries, file, item.
Add new child-levels	Used for adding child levels. See section on Lower Level Descriptions for additional information.
Repository **[Required]**	Start typing in the name of your institution and select from options that appear in the drop-down menu. ***Please note:** Do NOT fill in this field for child-level descriptions. The repository information is inherited from the parent-level.
Identifier **[Required]**	Enter your repository's unique reference code associated with the material you are describing (ex. an accession number or call number).

Edition Area (RAD 1.2)

This area is used for item-level descriptions to record information about items that exist in two or more versions.

Class of Material Specific Details Area (RAD 1.3)

This area is used for describing particular aspects of maps, architectural materials and postage stamps.

Dates of Creation Area (RAD 1.4/DACS 2.4)

Actor name **[Required]** (ISAAR-CPF 5.1.2/DACS 2.6)	Used for the creator of the materials being described: a person, family, or a corporate body. Start typing the name of an authority record that has already been created and, **from the drop-down list that will appear, click on the name to enter it.** Be sure to click on the name; simply typing a name and pressing "Enter" creates a brand new authority record (a duplicate of the one you were trying to select).
Event type	Select the type of activity from the drop-down list that specifies the relationship between the authority record and the archival description (ex. Creation, collection, accumulation.)

Place (RAD 1.4C1)	This field is used for printed materials with a place of publication.
Date **[Required]** (RAD 1.4B/DACS 2.4)	Provide the date(s) of creation of the unit being described (a single date or a date range; RAD identifies specific forms for uncertain and probable dates).

Uncertain and Probable Date Examples:

[1887?]	Probable date
[ca. 1918]	Approximate date
[187-]	Decade certain
[191-?]	Probable decade
[between 1939 and 1945]	Use for dates less than 20 years apart
[19--]	Century certain
[19--?]	Probable century
[before 1867]	Terminal date
[after 1903]	Terminal date
[1893 or 1894]	One year or the other

Physical Description Area (RAD 1.5B/DACS 2.5)

[Required]	At all levels, record the extent of the unit being described by giving the number of physical units and their nature. Please refer to RAD for details on various options, prescribed punctuation and formatting.

Examples:
- 10 cm of textual records. - 18 photographs.
- Approx. 114 architectural plans.
- 25 photographs : b&w negatives ; 35 mm
- 1 map ; 105 x 90 cm.
- 5 textual records. - 1 album (36 photographs).

Publisher's Series Area (RAD 1.6)

Use to describe details about published material, usually at the item level.

Archival Description Area

Administrative/Biographical History (RAD 1.7B/DACS 2.7)	This field is automatically completed with information taken from the history field of the authority record to which the unit has been linked. Please see the Dates of Creation area for instructions on linking an administrative/biographical history to a description.

Custodial History (RAD 1.7C/DACS 5.1)	Use to record any changes in ownership of the archival materials, if known. This is particularly significant when the materials are being donated by an entity (person or organization) other than the creator of the materials being described. If the materials were donated directly by the creator, the information is recorded under "Immediate Source of Acquisition" in the "Notes" area.
Scope and Content (RAD1.7D/DACS 3.1) **[Required]**	Indicate the level being described (Ex. "Fonds consists of…" or "Series comprises…") and present an overall summary (scope) of the unit being described: subject matter, time period, geographical area to which it pertains. The content portion consists of a summary of principle types of documents that make up the unit (minutes, photographs, diaries, correspondence, etc.). Provide information about the unit's structure with details of arrangement or organization ("The series consists of correspondence arranged in files chronologically by year. The subseries consists of the following files: …").

Example:

"The fonds contains source material on the administrative, financial, and artistic history of the Piggery Theatre in North Hatley from 1964 to 1996. It consists of minutes, correspondence, production and employment agreements, employee files, financial statements, grant applications, programmes, scripts, advertisements, photographs, and architectural drawings. The fonds is comprised of the following series: Administration (1964-1990), Human Resources (1972-1985), Financial Resources (1964-1990), Moveable and Immovable Resources (1964-1985), Productions (1965-1996), Public Relations (1965-1993), and Westbec Limited (1964-1976)."

Notes Area (RAD 1.8)

Physical condition	Use if applicable.
Immediate source of acquisition (DACS 5.2)	Record information about the donor(s) of the materials being described. This could also include the date(s) the material was donated.
Arrangement (DACS 3.2)	Use if applicable to record pertinent details about the arrangement of the material.
Language of material (DACS 4.5) **[Required]**	Record the language(s) of the material being described. Begin to type in the appropriate language and select it from the drop-down menu that will appear. More than one language can be selected.

Script of material and notes (DACS 4.5)	Use if applicable.
Location of originals (DACS 6.1)	Use when the materials being described are copies to identify the location of the originals, if known. If available, you can also add a link to online materials.
Availability in other formats (DACS 6.2)	Use when the materials be described are available in another format (ex. "Minute books are also available on microfilm in the reading room.")
Restrictions on access (DACS 4.1) **[Required]**	Use this field to record any information about restrictions placed on the access to unit (or parts of the unit) being described. Be a precise as possible. If there are no restrictions, write: "There are no restrictions on access."
Terms governing use, reproduction and publication (DACS 4.4)	Use if applicable.
Finding aids (DACS 5.4)	Use this field to record information about any finding aids, file lists, or inventories available.
Associated material (DACS 6.3)	If there are records in another institution that are associated with the unit being described, include a reference to the associated material (ex. If you are aware of a fonds by the same creator in another institution).
Related material (DACS 6.3)	If there are records in your institution that are related to the unit being described, include a reference to the related material by linking to the record in ETAP. Begin typing the name of the related description and select it from the drop-down list that appears.
Accruals (DACS 5.4)	Use to record details about accruals. Ex. "Further accruals are expected." or "No further accruals are expected."
Other notes	Use if applicable.

Standard Number Area (RAD 1.9)
Use only at the item level for published materials with an ISBN or ISSN number.

Access Points
This section consists of four categories: Subject access points, Place access points, Genre access points, Name access points (subjects). Start typing in the name of the subject term or place term that you wish to link to the description and select from the options that appear in the drop-down menu. ***Please note:** It is necessary to select from the generated drop-down list. Failing to do so will create duplicate records

in the system. Also to note, users are not able to add new subject or place terms. To request that new terms be added, please contact the Eastern Townships Resource Centre (database administrator): etrc2@ubishops.ca.

Control Area

The control area relates to the creation and maintenance of the description you have created. The fields in this section are not necessary for ETAP descriptions, but you may find them useful for the administrative purposes of your institution.

Description identifier	Use if applicable.
Institution identifier	Record the name of the institution responsible for creating or updating the description.
Rules of convention	Record the rules or conventions followed in preparing the description.
Status	Select Final, Revised or Draft status of your description.
Level of detail	Record whether the description consists of minimal, partial or full level of detail.
Dates of creation, revision and deletion	Record the dates when the description was created or revised.
Language of script	Indicate the language used to create the description of archival material.
Sources	Record citations for any external sources consulted in the preparation of the description.

Rights Area

This area is usually used to specify rights for individual items or to record details about copyright.

Administration Area

Users are able to set the descriptive standard (RAD, ISAAD-G, or DACS) for the record in this section. The default display standard for archival descriptions in ETAP is RAD, which is the Canadian descriptive standard. It is not necessary to edit this section unless you wish to set the display standard to something other than RAD.

Add/Edit Lower Level Descriptions

The *Eastern Townships Archives Portal* allows for the descriptions of materials within a fonds or collection at lower levels, from the series level all the way down to individual items.

To add a lower level description: from your fonds or collection description, add another level of description by clicking on the "Title and Statement of Responsibility" area. Once the area has been expanded, scroll down to the "Add New Child Levels" field.

Use the identifier field to record a unique reference number for the child description. This unique identifier only has to be unique within the specific fonds or collection you are describing and at the level you are describing. For example, there can be a series identified as "003" and a file identified as "003," but not two series identified with "003" within the same fonds/collection. The identifier can be as simple as "1" or "A". Select the level you wish to add from the drop-down list (series, file, etc.) and give it a title. At this point, you can add multiple new lower levels at the same time by selecting "Add New." Click "Save" at the bottom of the screen to create the lower level of description. Once created, lower levels are displayed on the left side of the archival description page.

To edit a lower level description: click on the title of the lower level description you wish to edit, which will take you to the editing page. Add information to the relevant fields as described in the "Archival Descriptions" area of this manual. Be sure to click "Save" before navigating away from the editing page.

*Please note: Do not enter the name of the repository or the name of the creator for lower levels of description (unless different from the parent-level description). This information is 'inherited' by child-level descriptions from the parent-level.

How to Move a Description

There may be a time where you need to move a lower level archival description (ex. series, file, item) from one fonds, collection, or higher level description to another (example: a series to a different fonds, or an item to a different file or series).

To move a description, when looking at the webpage for the description you wish to move, select the "Move" button at the bottom of the page. ***Please note:** If you are moving to a higher-level description (ex. a series) that has lower-level descriptions attached to it, the lower-level descriptions will be moved as well.

In the "Search title or identifier" bar that appears at the top of the new page, search for the collection, series, or file you wish to move the description to.

When you have found the appropriate description among the search results, click on the title. Then on the new page that comes up, select "Move here." At this time, a banner will appear across the top of the page, stating "Move initiated."

How to Rename a Title and the related URL link

If you need rename an archival description following its initial creation, it is recommended to also ensure that the "slug", a.k.a. the URL link, is updated as well. For example, when uploading multiple digital objects in a batch, the initial titles will likely be Image 01, Image 02, Image 03, etc. Because each archival description has a unique URL on the *Eastern Townships Archives Portal*, if there are multiple descriptions with the same name, it will add a number to the end to differentiate between two descriptions with the same title.

Where to find the slug when looking at your archival description:

When looking at the page for the archival description you wish to change, select "More" and select "Rename" on the menu at the bottom of the page.
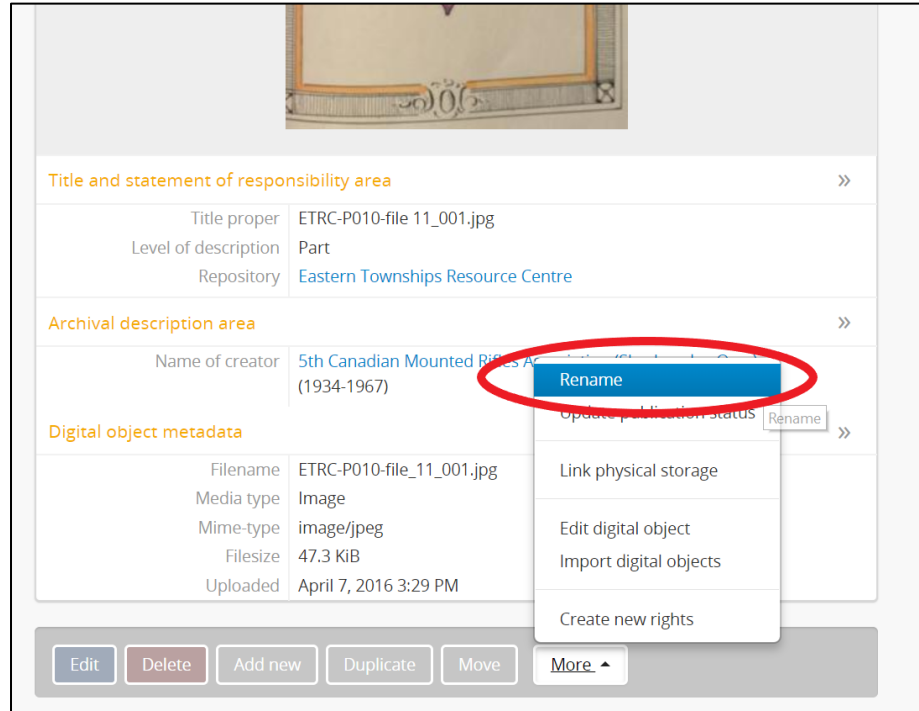
On the new page, use the Title and Slug boxes to change either the title and/or slug. If you change the title and leave the boxes (on the right-hand side) checked, changing the title will automatically also update the slug to reflect the changes. Click on "Update" to save changes.

Add/Edit Digital Objects

The *Eastern Townships Archives Portal* supports the linking of digital objects, including images, audio or video, to archival descriptions.

To Add a Digital Object: Every digital object must be associated with an archival description, usually at the file or item level. When uploading single digital objects, the description that you would like to link your digital object to must have already been created before the object can be added. From the bottom of the editing page of the description you would like to link to, click the "More" button in the bar at the bottom of the screen, which will display a selection of options, including : "Link Digital Object" and "Import Digital Objects."
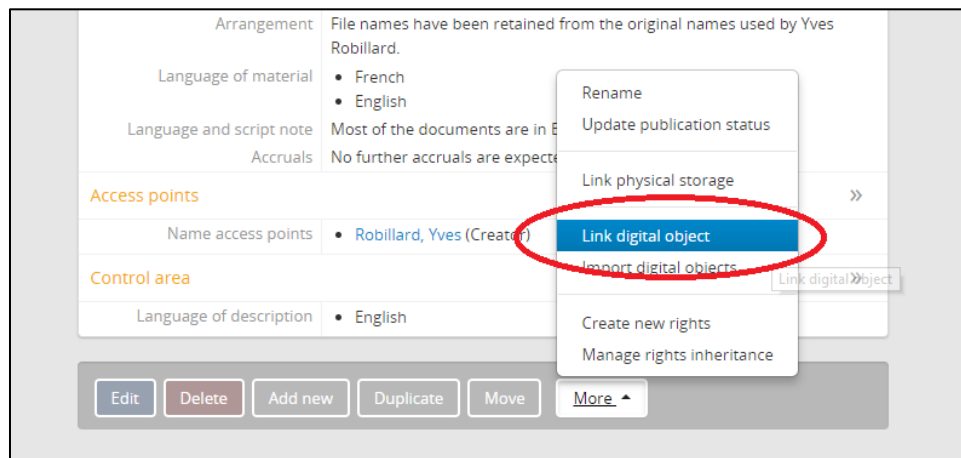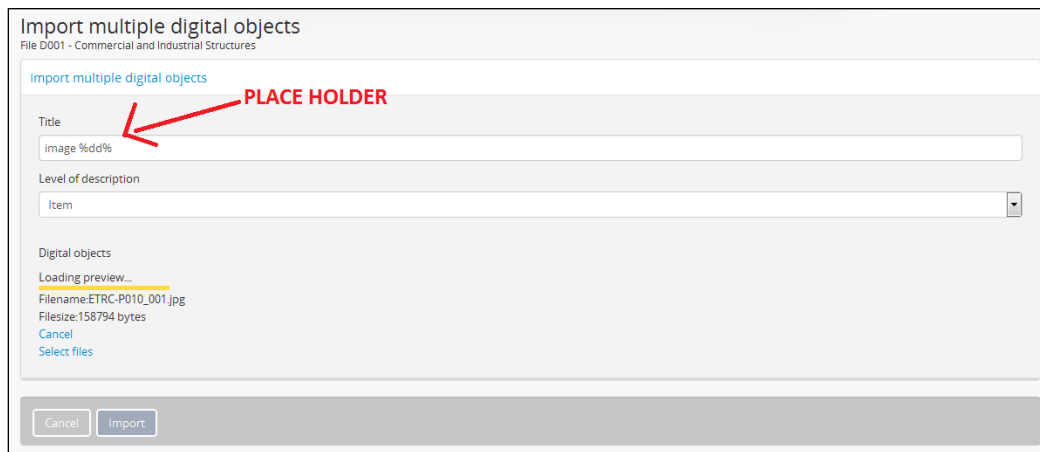

If you want to upload an object from your local system to be stored on the ETAP site or link to a digital object stored somewhere on the Internet, select "Link Digital Object" and then identify the appropriate file accordingly (either by selecting it from your local files or by entering the web address of the item). Once the file has been uploaded or linked, the display will show the digital object.

*Please note: Only one digital object can be linked directly to an archival description.

To Upload Multiple Digital Objects: There is an option to upload multiple digital objects without first having to create associated descriptions by uploading them as children of a selected archival description. To do this, click on "More" and select "Import Digital Objects".
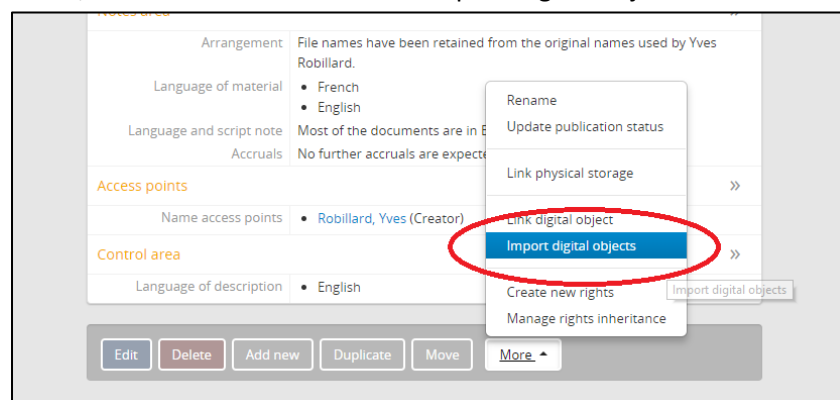
Select a title that will used for the placeholder archival descriptions (a.k.a. temporary description titles) that will be created for each digital object. The default title is image 01, image 02, etc.
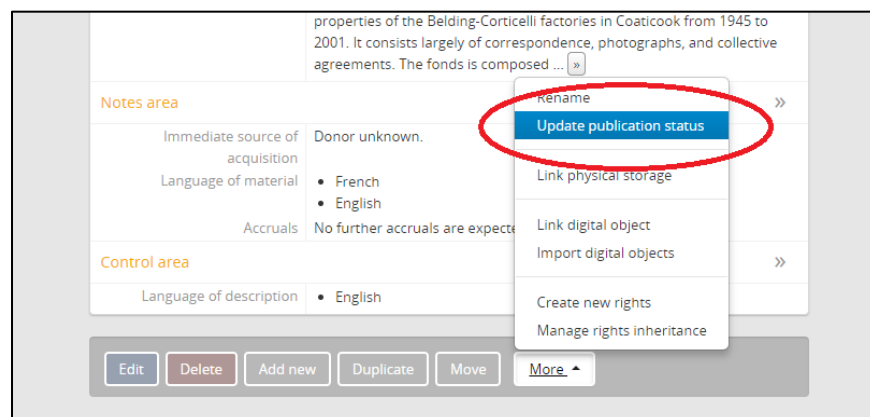

Select the appropriate level of description from the drop-down list. Click "Select Files," which will allow you to select the files you wish to upload from your computer. Once you have made your selections, click "Import." Once the import has been completed, the lower-levels will show up on the left side of the screen when viewing the top-level description (fonds or collection). At this point, you can further edit the archival descriptions for each of the digital objects (ex. Adding dates, identification, appropriate titles, etc.).

*Please note: Because each institution is limited to 1GB of storage (unless they have purchased extra), lower resolution JPG or PDF files should be uploaded to the *Eastern Townships Archives Portal.* AtoM restricts each digital object file size to 100MB.

Publish your Archival Descriptions

When users create and save a new description record, the database will save it in a draft form. This allows logged in users from your organization to view and edit the record but it will not be accessible to public users (those without a log-in name and password). **Setting a description to "Published" will make the description accessible to the public as well as logged-in users.** To publish your description, click on "More" and select "Update publication status."
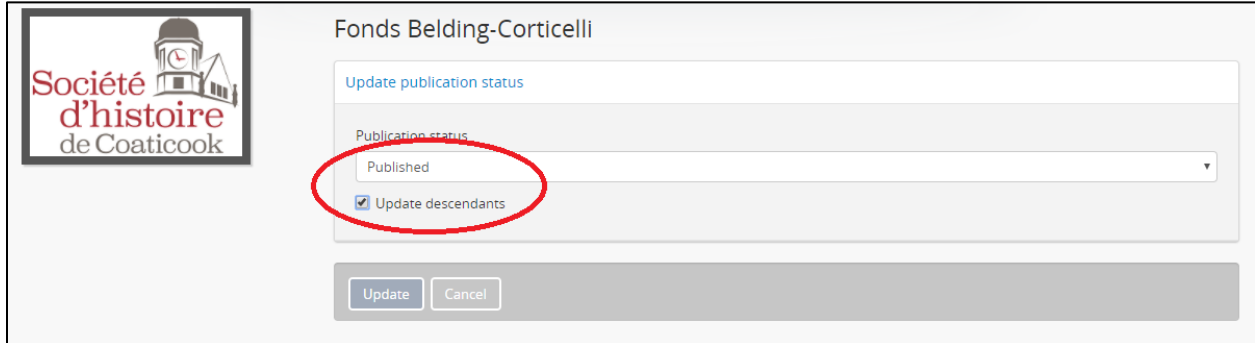
On the next screen, select "Published" from the drop-down menu. If you would like to publish all of the records that are part of a specific fonds or collection, go the publish screen for the parent-level description (either the fonds or the collection level), select "Published" and also check the box for "Update descendants." (See screenshot below) Select "Update" to save the changes.

*Please note: Descriptions created by users are saved in DRAFT by default. Logged-in users must follow the steps above to publish their descriptions in order to make them available to the public.

Add/Edit Authority Records

In the *Eastern Townships Archives Portal*, biographical and administrative histories about creators are held in authority records separate from the archival descriptions. The authority records are then linked to the appropriate archival description. In order to prevent the creation of duplicate authority records, it is important that an authority record be created before the related archival description is created.

Before creating a new authority record:
- Do a search to see if there is an authority record for that particular person, family or corporate body has already been created.
- If there is one already in existence, it can be edited by clicking on the "Edit" button at the bottom of the record. In the interest of open communication within the network while also ensuring there are no duplicate authority records, if the record you are editing was created by another institution, please contact the institution in question to inform them of the changes.

To create an authority record: Click on the "add" button, represented by (found on the upper right side of the home page), and select "authority record." Click on the title to expand each section and fill in the required and other appropriate fields.

Identity Area (ISAAR-CPF 5.2)

Type of entity **[Required]**	Choose appropriate entity from drop-down list: Person, Family, or Corporate Body
Authorized form(s) of name **[Required]**	Record the standardized form of name being described in accordance with RAD
Parallel forms of name	Record any parallel forms of name. Ex. French-language version of a corporate body's name.
Standardized form(s) of name according to other rules.	Use if applicable.
Other forms of name	Record other names by which the entity may be known, such as maiden names, pseudonyms, corporate name changes over time, prenominal and postnominal titles of persons and families, acronyms, etc.

Identifiers for corporate bodies	Use if applicable. (Ex. Company registration number).

Description Area (ISAAR-CPF 5.2)

Dates of existence **[Required]**	Record dates of existence of the entity being described. For persons: include birth and death dates; for corporate bodies: include dates of establishment and dissolution, if known. Please see Annex A for proper forms of birth and death dates.
History **[Required]**	Record in narrative form or as a chronology of events, activities, achievements, roles of the entity being described. *This section is the administrative history/biographical sketch section from RAD.
Places	Record the name of the predominant place(s)/jurisdiction(s), together with the nature and covering dates.
Legal status	Record legal status of the corporate body and covering dates.
Functions, occupations, and activities	Record functions, occupations and activities performed by the entity being described, include covering dates when useful.
Mandates/Sources of authority	Use if applicable.
Internal structures/Genealogy	Describe the internal structure of a corporate body and the dates of any changes to that structure that are significant to the understanding of the way that corporate body conducted its affairs (e.g. by means of dated organization charts). Describe the genealogy of a family (e.g. by means of a family tree) in a way that demonstrates the inter-relationships of its members with covering dates.

Relationship Area (ISAAR-CPF 5.3)

Related corporate bodies, persons or families	Use this field to establish a link between the authority record and another authority record that exists already. Use the "Add new" option in this section and start typing the name of the authority record you wish to link. Select from the drop-down menu that appears.
Category of relationship	Select the appropriate relationship from the drop-down list: Hierarchical, Temporal, Family, or Associative.
Description of relationship	Use if applicable.
Dates of the relationship	Record the start and end dates of the relationship between the two entities when applicable.
Related resources (links with archival descriptions)	Use this field to establish a link with an existing archival description. Use the "Add new" option Use the "Add new" option in this section and start typing the title of the archival description you wish to link. Select from the drop-down menu that appears. *A link between an authority record and an archival description can also be made in the archival descriptions area.

## Control Area (ISAAR-CPF 5.4)

Authority record identifier [Required]	Record your institutional code here plus a unique authority record identifier. **If your institution does not have unique identifiers for creators, record your institutional code only.**
Maintaining repository	Select your institution from the drop-down list.
Institution identifier [Required]	Record the code of your institution here.
Other fields	Other fields that may be useful for administrative purposes.

Add/Edit Archives Storage Locations ("Physical Storage")

The *Eastern Townships Archives Portal* allows members to keep track of and manage the storage locations for their archival fonds and collections. This function enables users to record where their material is stored as well offers a quick overview of all material linked to a particular box, filing cabinet, shelf, etc.

Please note: Box locations are NOT visible to public users of ETAP. They are only visible to signed-in members of ETAP. Other member institutions of ETAP are also using the database to manage their storage locations. In order to ensure your location identification numbers/names do not duplicate those already in the database, please take a few minutes to peruse the naming patterns of the other institutions before starting to create storage names. For the steps to access the list of physical storage locations, please see the "To access the list of storage locations" section below.

To add a storage location to an archival description: Go to the appropriate archival description, click the "More" button at the bottom of the description and select "Link physical storage."
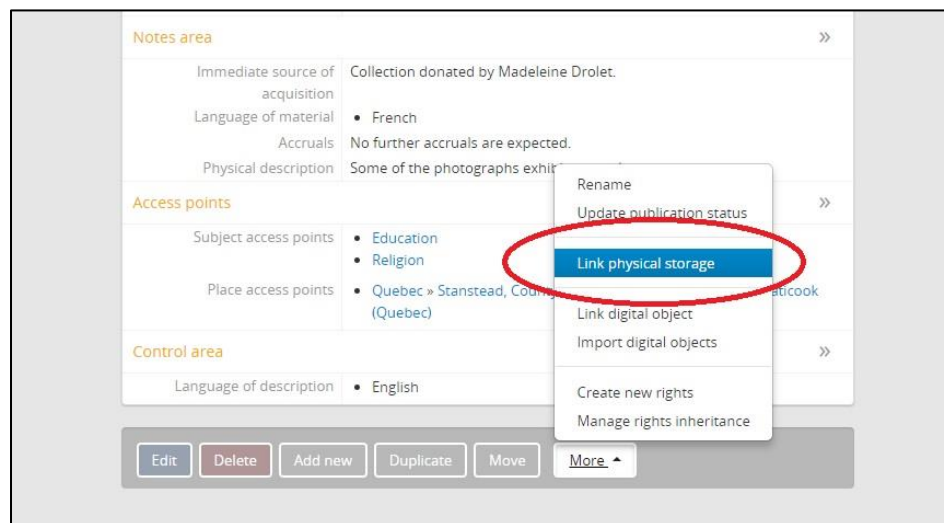
The screen display will give the user the option to link to an existing storage location, called a "container" in the database, or to create a new storage location.

> **If the storage location already exists** (ex. if you have already have another archival description linked to the same location), click in the box below "Containers" and start to enter the appropriate location name. A list of locations will then appear in a drop-down list (see image below). **It is very important to select a box from the generated drop-down list.** If you enter an existing box number manually in the Containers section and save, the software will create a duplicate storage location with the same name.

From here it is also possible to link to multiple containers if your archival material is stored in more than one location. Once you have selected the appropriate container(s), click on "Save."

➢ **If the required storage location does not already exist**, create a new storage location record in the "Or, create a new container" area.

The "Name" section is for the name of location (a few examples: R7-Sh.1, B-7, or B-3-B), which should use the system employed by your institution. The "Location" section is for the more general storage area, which could refer to a room, building, vault, etc. There is no limit to the number of containers that can be linked to the same location. Finally, in the "Type" section, select the most appropriate storage unit from the drop-down menu (ex. box, shelf, filing cabinet, etc.). When you have entered all of the information, create the new storage location and link to the archival description by clicking "Save."

Once a container has been linked to an archival description, logged-in users can see the physical storage location(s) listed on the right side of the screen when viewing the archival description (see photo below).
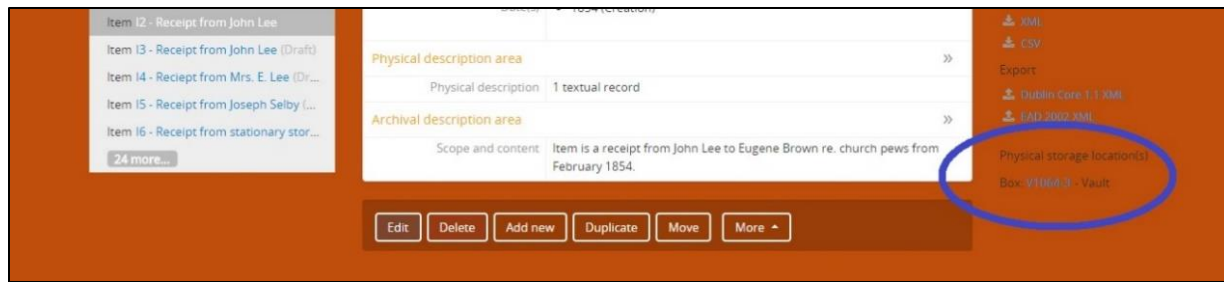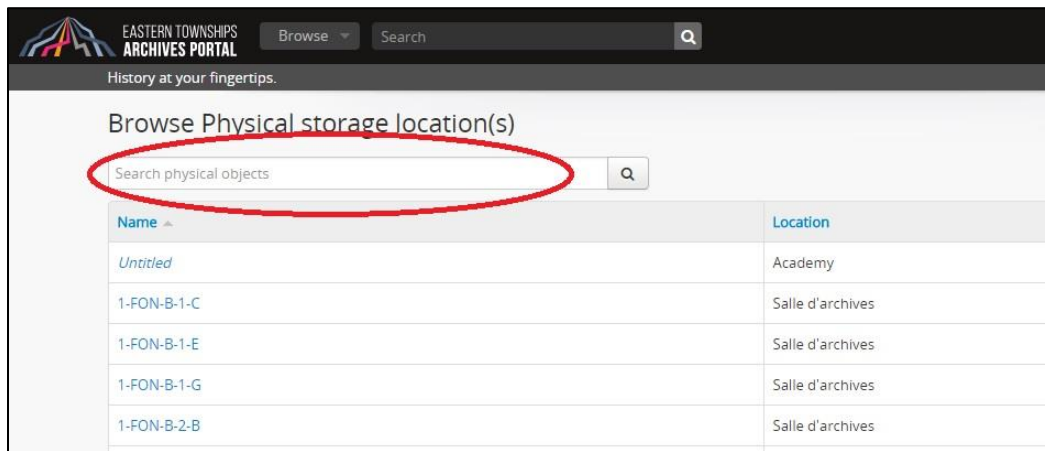
To delete a physical location link from an archival description: Click on "More" and select "Link physical storage." From the physical storage location screen (see below), you will see a list of the storage container(s) linked to the archival description at the top of the screen with the location name on the left and a corresponding pencil and X on the left. Click on the X to delete the link between the archival description and the storage location. You may then add a link to a different storage location (using the method described above) if desired. Remember to save all changes by clicking on "Save" at the bottom of the screen.
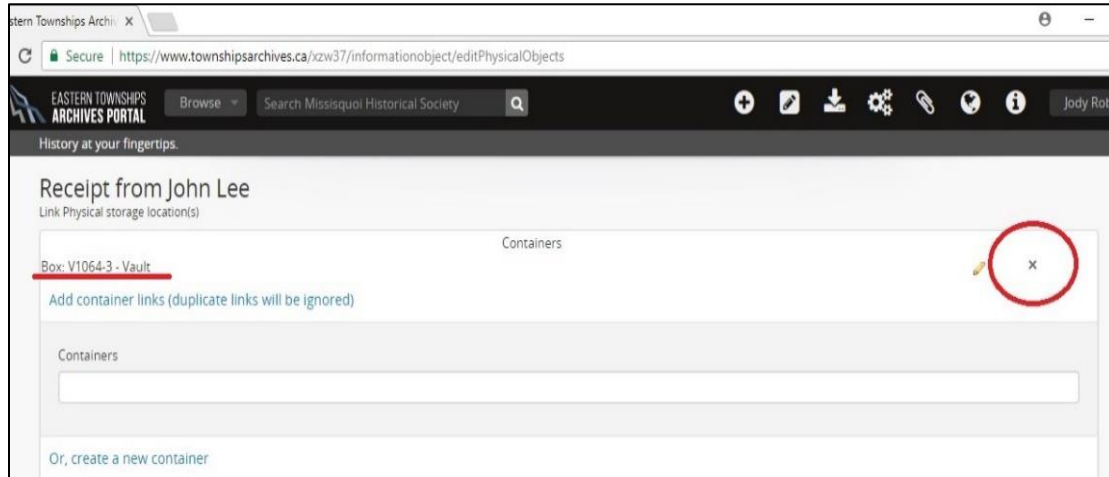
To access the list of storage locations: Click on the pencil icon on the top right side the screen, and select "Physical storage."
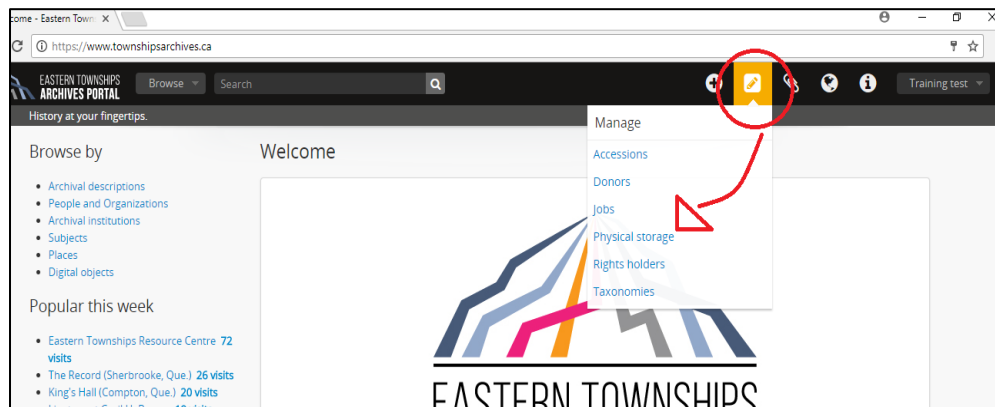
You will now be at the "Browse physical storage locations" page. From here, it is possible to search for a location name using the "Search physical objects" search box or to browse through the list using the page listing at the bottom of the screen.

Selecting a container name will then take you to a list of its contents. A container contents list can be printed by clicking on the printer symbol that appears next to the container name on the left side of the screen.

To edit a container name or location: select the "edit" button at the bottom of the screen, change the necessary information on the edit page, and select save. ***Please note: Changing the name of the container will NOT delete the link between the fonds/collection and the container. This method WILL change the name of the particular storage location appearing on ALL linked archival descriptions.**

How to Create Finding Aids

ETAP is able to create PDF finding aids that can viewed and/or downloaded by public users. However, only logged-in users can create a finding aid so that it can be available for public users.

> ➢ <u>To create a finding aid:</u> Go to the fonds or collection description for the group you would like to describe. On the right side of the page, under the title of finding aids, there are two options: Generate or Upload (see image below). Click "Generate to create a full finding aid for the fonds or collection you are looking at. This section will also allow users to upload finding aid they have previously prepared, which can be done by clicking "Upload". All uploaded files should be in PDF format.

Annex A : Dates of Existence Forms for People

1924-	Living person
1900 Jan. 10-	To distinguish between two living individuals of the same name and birth year
1837-1896	Both birth and death years known
1836 or 1837-1896	Probable year of birth
1837-ca. 1896	Approximate year of death
ca. 1837-ca.1896	Both years approximate
b. 1825 / d. 1859	Only one year known
fl. 1893-1940	Years of birth/death unknown, some years of activity known
18th cent.	Only century known

Annex B : Subject Access Points

For the most recent list of subject access points, please see the document link on the "About" page of the Portal: https://www.townshipsarchives.ca/about.