**Archival Processing Checklist**

This checklist contains a list of the finding aid fields that must be completed when writing archival description, as well as the steps that must occur once arrangement and description is complete. Links to [DACS](https://saa-ts-dacs.github.io/) rules are included when applicable. Be sure to consult the relevant section of the Archival Processing Manual for more detailed information on how to complete each task.

# **Archival Description**

The tasks in this section correspond to the information detailed in the *Archival Description: Writing a Finding Aid* section of the Archival Processing Manual.

## **Front Matter**

### **Basic Information in ASpace**

* Title [[DACS 2.3](https://saa-ts-dacs.github.io/dacs/06_part_I/03_chapter_02/03_title.html)]
* Mss Identifier [[DACS 2.1](https://saa-ts-dacs.github.io/dacs/06_part_I/03_chapter_02/01_reference_code.html)]
* Level of Description (should always be collection) [[DACS Chapter 1](https://saa-ts-dacs.github.io/dacs/06_part_I/02_chapter_01.html)]
* Language (usually *English* or *Multiple Languages*) [[DACS 4.5](https://saa-ts-dacs.github.io/dacs/06_part_I/05_chapter_04/05_languages_and_scripts_of_the_material.html)]
* Dates [[DACS 2.4](https://saa-ts-dacs.github.io/dacs/06_part_I/03_chapter_02/04_date.html)]
* Extents (for both paper and electronic records) [[DACS 2.5](https://saa-ts-dacs.github.io/dacs/06_part_I/03_chapter_02/05_extent.html)]

### **Finding Aid Data in ASpace**

* Finding Aid Filing Title (in filing order)
* Finding Aid author (in direct order) [[DACS 8.1.5](https://saa-ts-dacs.github.io/dacs/06_part_I/09_chapter_08/01_description_control.html#archivist-and-date)]
* Descriptive Rules (this is always DACS) [[DACS 8.1.4](https://saa-ts-dacs.github.io/dacs/06_part_I/09_chapter_08/01_description_control.html#rules-or-conventions)]
* Language of Description (this is always English)
* Sponsor note (if applicable)

### **Revision Statement**

* Include a revision statement if the collection is an addition or accrual [[DACS 8.1.5](https://saa-ts-dacs.github.io/dacs/06_part_I/09_chapter_08/01_description_control.html#archivist-and-date)]

### **Identifiers** [[DACS 2.1.3](https://saa-ts-dacs.github.io/dacs/06_part_I/03_chapter_02/01_reference_code.html#local-identifier)]

* Collection call number
* Bnumber after collection is cataloged

### **Controlled Access Terms**

* Agent Main Entry [[DACS 2.6](https://saa-ts-dacs.github.io/dacs/06_part_I/03_chapter_02/06_name_of_creators.html)] (unless collection is an artificial collection)
* Agent Subjects and Contributors [[DACS 2.6](https://saa-ts-dacs.github.io/dacs/06_part_I/03_chapter_02/06_name_of_creators.html)]
* Topical subjects
* Occupation subjects
* Form/genre terms

## **Finding Aid Notes (Required Fields)**

* Abstract [Commentary note to [DACS 3.1](https://saa-ts-dacs.github.io/dacs/06_part_I/04_chapter_03/01_scope_and_content.html)]
* Conditions Governing Access (for collections with audio and moving image content and specific restrictions) [[DACS 4.1](https://saa-ts-dacs.github.io/dacs/06_part_I/05_chapter_04/01_conditions_governing_access.html)]
* Immediate Source of Acquisition [[DACS 5.2](https://saa-ts-dacs.github.io/dacs/06_part_I/06_chapter_05/02_immediate_source_of_acquisition.html)]
* Administrative/Biographical [[DACS 2.7](https://saa-ts-dacs.github.io/dacs/06_part_I/03_chapter_02/07_administrative_biographical_history.html)]
* Processing Information [[DACS 7.1.8](https://saa-ts-dacs.github.io/dacs/06_part_I/08_chapter_07/01_notes.html#processing-information)]
* Scope and Content [[DACS 3.1](https://saa-ts-dacs.github.io/dacs/06_part_I/04_chapter_03/01_scope_and_content.html)]
* Consult *optional fields* section of processing manual for information on other notes

## **Container List**

* Container Instance for each component
* Electronic Records Indicator and extent for each ER
* Unique identifier for each audio and moving image item

# **After Processing in Complete**

These steps should be completed once you have completed processing a collection and writing the finding aid.

* Send out finding aid for peer review
* Complete Closing Memo
* Send Finding Aid and Closing Memo to your supervisor
* Print Box Labels
* Barcode Boxes and add to ASpace top containers
* Mark processed boxes as inactive in SPEC
* Import object records into SPEC from ASpace
* Update locations of new containers in SPEC

# **Final Steps**

These tasks should only be completed once a finding aid has been approved by your supervisor and the collection’s Trello card has been moved to the Shipping Trello board.

* Update Trello card with box totals
* Catalog collection
* Create EAD record
* Send EAD record to your supervisor
* Prepare items to ship
* Gather materials to be transferred or discarded
* Prepare separated materials for disposal
* Complete CLMGT disposal form
* Add catalog link to Wikipedia