Archives Association of British Columbia

MemoryBC AtoM version 2.4.

User Manual

AABC MemoryBC User Manual

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Date: This manual was produced in September 2018 for MemoryBC AtoM version 2.4.

Purpose: This manual was produced for AABC Institutional members who are using, or want to use, MemoryBC.

Questions: Contact the MemoryBC Coordinator at bcans@aabc.ca.

Introduction

MemoryBC, www.memorybc.ca, is supported by the Archives Association of British Columbia (AABC). Institutional Members of AABC may post archival descriptions, authority records and information about their archives in MemoryBC for the public to use. Much of the information put into MemoryBC is transferred to ArchivesCanada.ca, the national archives portal.

MemoryBC uses AtoM (Access to Memory), a web-based software application for standards-based archival description, authority records and institutional profiles in a multi-lingual, multi-repository environment. It is designed to support descriptions based on the Canadian Rules for Archival Description (RAD) and authority records based on the ICA's International Standard Archival Authority Record for Corporate Bodies, Persons and Families (ISAAR). MemoryBC allows you to describe your archival holdings in context, so you will link your description to a creator and your archival institution, resulting in a complete account of what the records are, who created them and what institution holds them.

This manual goes through only the fields needed in MemoryBC. If there are additional questions, or you need help with anything, contact the MemoryBC Coordinator at bcans@aabc.ca.

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1. Log In to Memory BC

Log in to add or make changes to your institutional profile, authority records, or descriptions.

Go to the top right side of the MemoryBC.ca website and put in your username and password. This is provided to current Institutional Members. Contact the MemoryBC Coordinator at bcans@aabc.ca if you require assistance with the log in, to add a user, or to change the password.
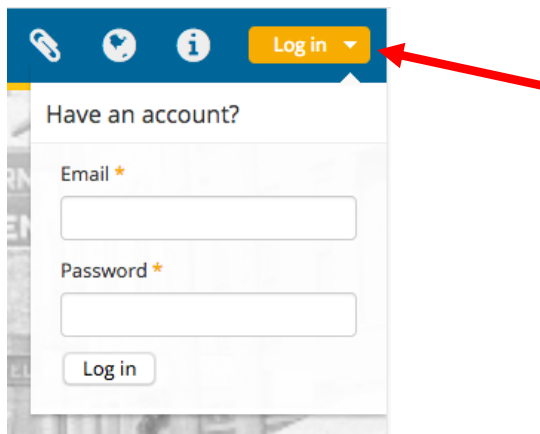
When you have successfully logged in, your name will appear where the Log in button was and more icons will appear in the right side navigation bar.
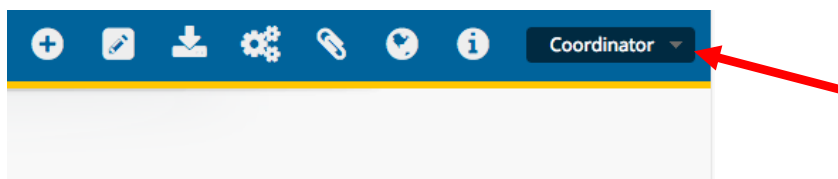
2. Institutional Profile

Institutional profiles hold information about an institution and are based on the ISDIAH standard, which is the *International Standard for Describing Institutions with Archival Holdings*, http://www.ica.org/download.php?id=1657.

If you are a new member, contact the MemoryBC Coordinator at bcans@aabc.ca so they can set up a profile for you. The Coordinator will give you an institution code and ask for contact information that can be made public. The Coordinator will then add this information to the new profile. Existing members may email the Coordinator and request changes be made to the profile.
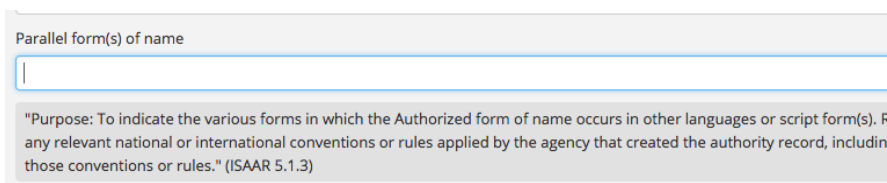
3. Authority Records

Once logged in, you can add a new Authority Record. Authority Records contain information about the creators and very important entities/people that are associated with archival descriptions. They can be people, organizations, government departments, businesses, families, etc.

They are based on the ISAAR-CPF standard, which is the *International Standard Archival Authority Record for Corporate Bodies, Persons and Families* http://www.icacds.org.uk/eng/isaar2ndedn-e_3_1.pdf.

There are a few things to know about the Authority Record area:

- If you want to add information to the Authority Record after it is created, or delete this record, please contact the MemoryBC Coordinator before any changes are made. All Authority Records are shared, so the Coordinator needs to confirm that the changes won't have an impact on other members who may be using that Authority Record.

- The ISAAR-CPF standard is used for Authority Records. The fields that are required for this standard are noted in the Authority Record area with orange asterisks. Note that the Authority Record will publish, even if those fields are not filled out.

- The Authority Record is published as soon as the Create button is clicked, there is no draft state.

- If there is a field that you want more information about, click in that field and a box will come up with a brief explanation of that field in the standard.


- There is no auto save, so it is recommended that the information be compiled in a Word or Excel document, and then copy and pasted into the fields. **The system will time out if too much time is taken in the creation or editing of the Authority Record and all information not saved will be lost.**

All institutional members share this area, so there may be Authority Records that are shared (two or more institutions have material from the same creator), and many that are not shared with others. **Thus, before creating a new Authority Record, search MemoryBC to ensure that another institution has not already added it.**

Type the name into the Search bar at the top of the MemoryBC website. Use quotes around the term or phrase being searched for, and don't press enter. Instead, wait for the drop down menu to come down and only search the Names (shown as People and Organizations) area, as shown in the screen shot below.
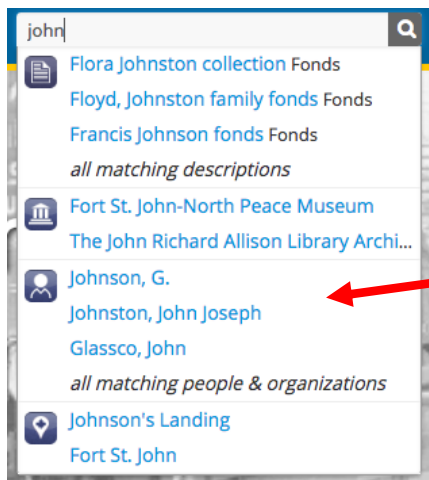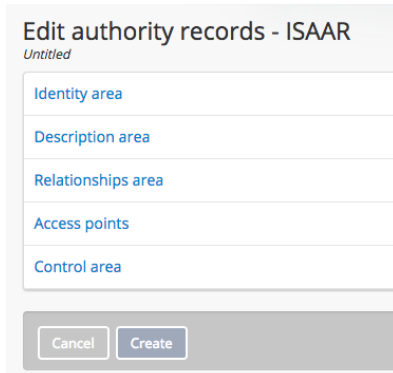

If an Authority Record is found that is the same as the one you were searching for then you don't need to create the Authority Record. If the Authority Record is missing information, or you feel should include other information, please contact the MemoryBC Coordinator at bcans@aabc.ca who will ensure everyone who uses this authority is contacted about the proposed changes.

If no similar Authority Record is found, then create a new one. Go up to the 'plus icon' in the top right navigation area. Click on it and click 'Authority Records'.
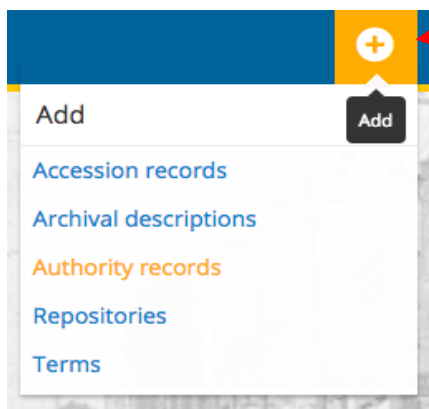
The next screen should be the 'Edit authority records-ISAAR' screen with five areas. Each area has a name that is a link - when clicked, a drop down list of fields appears to be filled out.
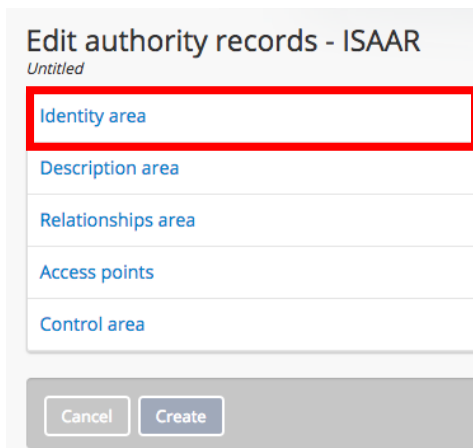

The following are the fields that are recommended for authority records in MemoryBC. You are encouraged to fill out the other fields as well, but they are all optional.

3A. Identity Area
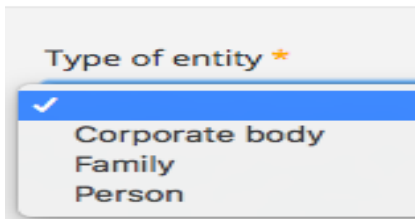

In the Identify Area, fill out the following fields:

Type of Entity (ISAAR Required)
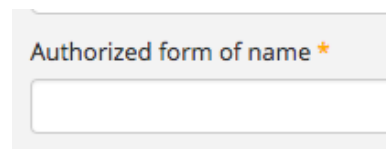Choose Person, Family or Corporate Body that is closest to your creator or entity.
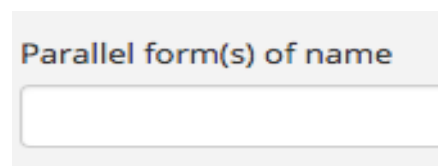
Authorized Form of Name (ISAAR Required)

Type the last used name of the entity. This follows the RAD standard. For names, use last name, first name, such as "Jones, John". If it is a family, use name (family), such as "Atkins (family)". For an entity like a business or organization, use the name, such as "Acme Tool Company", or "University of British Columbia. Faculty of Arts". There may be times when a qualifier is needed to make it unique, such as "United Women's Organization (Victoria, BC)".
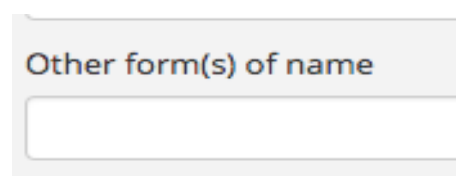

Parallel Form of Name (Optional)

If an entity has a name that is parallel to the main authorized form of name, put it here. The most common use is when the name has an English and French name, so the French name would usually be put in here. More than one name can be added.
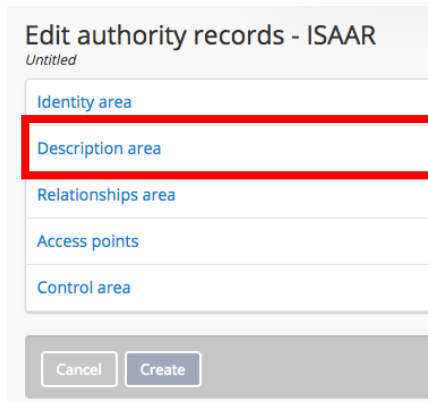

Other Form of Name (Optional)

If an entity has used another name put it, or multiple names, in here. This includes maiden names, nicknames, former company names, acronyms, pseudonyms, nobility titles, honour titles, etc. More than one name can be added.

3B. Description Area
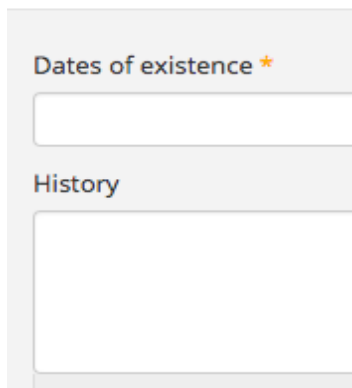

In the Description Area, fill out the following fields:

Dates of Existence (ISAAR Required)
Add dates that the entity was alive, or active. If this is a person, add the birth and death dates (if known). If this is a corporate entity, add the dates it was active from the earliest date to latest date (if known).

Examples include:
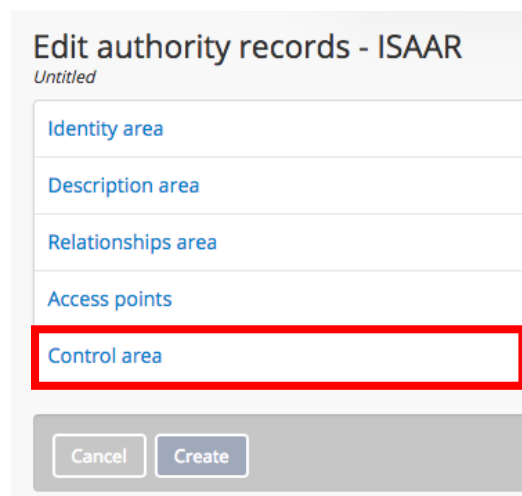- 1950 = Still current
- 1950-1990 = Birth/death dates or start/end dates known
- 1950 or 1951-1990 = Start/birth date not certain, but within 2 yrs.
- 1950?-1990 = Probable birth or start date
- ca. 1950-1990 = Year of birth or start date uncertain
- ca. 1950-ca.1990 = Both dates uncertain
- b.1950 = Birth date known
- d.1990 = Death date known
- 20th cent. = Both dates unknown, but century known

History (Optional but Important)

Add any information about the entity in narrative form and dates may be included. If this is a person or family, add places they were born, died and lived, occupations, education, activities, achievements, religious or political affiliations, etc. If this is a corporate body, add dates of founding, change and/or dissolution, mandate, what came before or after and names used, administrative structure and relationships, names of important people and any other significant information.

3C. Control Area

In the Control Area, fill out the following fields:
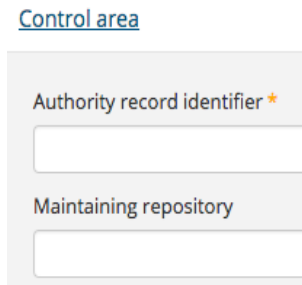
Authority Record Identifier (ISAAR Required)

Ignore this area, as no identifier is available.

## Maintaining Repository (Optional but Important)

If this is a new Authority Record, link it to your institutional profile. Type in the first five letters of the institution name and wait for 3 seconds. A drop-down list will appear and choose your institution from the list.

If this is not done, then a duplicate institution will be created!

Once these fields are filled out, then press the Create button at the bottom of the page, and the Authority Record will be published.
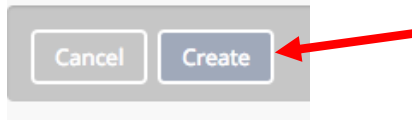
4. Archival Descriptions

Once logged in you can add a new archival description, or change one already in the system.

Archival descriptions are descriptions of archival materials, no matter what kind of materials they are: text, image, video, etc. The descriptions are based on the Rules for Archival Description (RAD) standard, which is the Canadian standard used by many archives in Canada.

See (http://www.cdncouncilarchives.ca/RAD/RADComplete_July2008.pdf).

Archival descriptions usually start at the top level of fonds or collection. They are hierarchical, so under this top level are other sub-levels, such as series, files, items, etc. It is recommended that top level descriptions be added first, if at all possible. There are a few things to know about the archival description area:

- This area is not shared between institutions, so every description entered is unique.

- Changes can be made at any time to any description, however the archival description will remain in draft.

- All changes must be approved by the MemoryBC Coordinator, who will review the changes and publish the description(s) so the public can see them.

- Once changes are made, email the Coordinator at bcans@aabc.ca and ask for a review so the description(s) can be published.

- The RAD standard is used for descriptions, and the fields required for this standard are noted with orange asterisks.

- Note that the archival description will be published by the MemoryBC Coordinator even if these fields can't be filled out. However, the MemoryBC Coordinator will ask why those fields have been left empty, before publishing.

- If there is a field that you want more information about, click in that field and a box will come up with a brief explanation of that field in the RAD standard.

- There is no auto save, so it is recommended that the information be compiled in a Word or Excel document, and then copy and pasted into the fields. **The system will time out if too much time is taken in the creation or editing of the archival description and all information not saved will be lost.**

Creating a New Description

To create a new archival description, go up to the 'plus icon' in the top right navigation area. Click on it and click 'Archival Descriptions'.
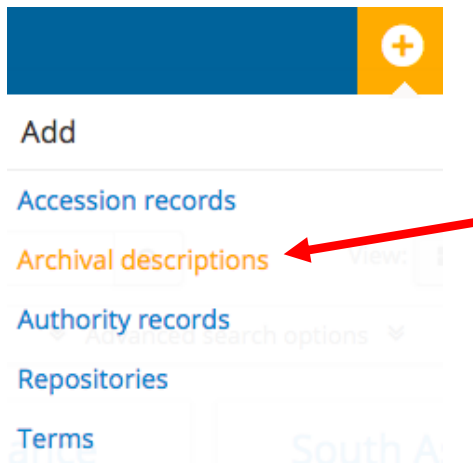
The next screen should be the 'Untitled' screen with twelve descriptive areas. Each area has a name that is a link. When clicked a drop down list of fields appears to be filled out.

The following are the fields that are recommended in MemoryBC. You are encouraged to fill out the other fields as well, but they are all optional.

4A. Title and Statement of Responsibility Area

In the 'Title and Statement of Responsibility Area', fill out the following fields:

Title Proper (RAD Required)

Enter the official title of the description. For example: John Jones fonds, Smith Postcard Collection, Jones family fonds, etc. The term 'fonds' or 'collection' should be used only on the top level, do not include terms such as 'Series', 'File', etc. in lower level descriptions.

General Material Designation (Optional)
Choose any, or all, material types that are present in the fonds or collection. RAD says to use Multiple Media if more than three types are present. This is not recommended as searchers can't then search for specific material types in the Advanced Search on the Archival Descriptions page: (www.memorybc.ca/informationobject/browse)

Level of Description (RAD Required)
Choose the correct level of description. Choose 'fonds' or 'collection'.

Add New Child Levels (Optional)
While creating the fonds or collection, very basic series descriptions can be created at the same time. In this area, type in Identifier (if used), Level of Series, Title and Date. Press the 'Add New' button to create as many series as wanted[MOU1] .

Once the fonds or collection draft description is created, the very basic series description will also be created in draft status. Go into each series description to add 'Physical Description' and 'Scope and Content'. If other levels are present, go into each series description and create the files under it, then go into each file and add all items under them.

Repository (Required)

This is where your institutional profile is linked to the archival description. Put your mouse in the field and start to type in your institution name. Wait two seconds for the drop down to show and choose your institution from the list. If you type it in rather than choose from the list, a duplicate institutional profile will be created. If this occurs, contact the MemoryBC Coordinator, who will delete the duplicate profile.
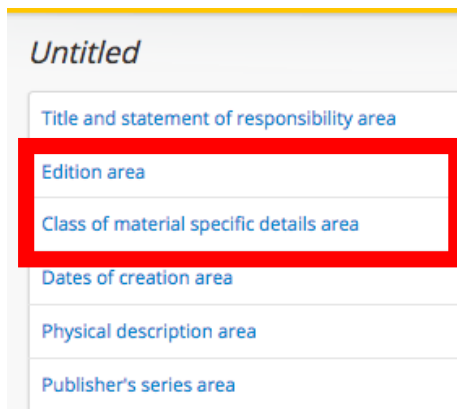

Identifier (Optional but Important)

If an Identifier is available, type it in this area. This could be an accession number, call number, etc. If more than one identifier is present, such as a barcode or old identifier, press the 'Add Alternative Identifier(s)' link to add more identifiers.

4B. Edition Area & Class of Material Specific Details Area

The 'Edition Area' is used for published materials for item level descriptions only that exist in more than one edition.

The 'Class of Material Specific Details Area' is used to note specific aspects of maps, architectural drawings and stamps.

4C. Dates of Creation Area
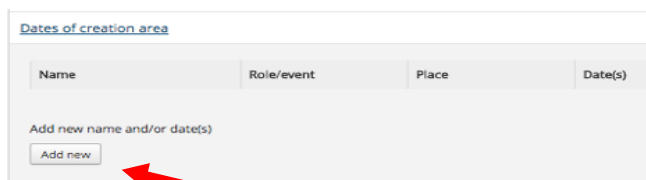
In the 'Dates of Creation Area', press the 'Add New' button and fill out fields in the pop up window and click 'Submit'.
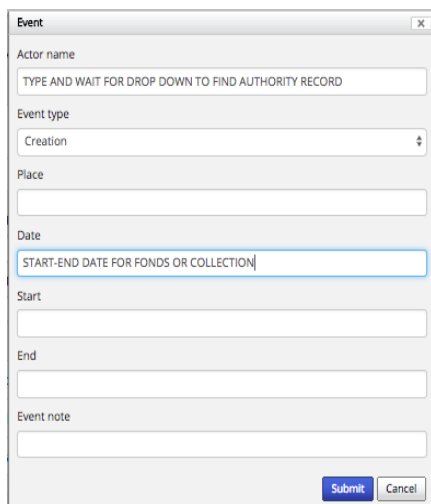
The recommended fields are:

Actor Name (RAD Required)

This is where the Authority Record of the creator(s) is linked to the archival description. Put your mouse in the field and start to type the authority name and wait 3 seconds for the drop down menu to come up. Choose the correct Authority Record. Wait two seconds for the drop down to show and choose your authority record from the list. If you type it in rather than choose from the list, a duplicate authority record will be created. If this occurs, contact the MemoryBC Coordinator, who will delete the duplicate authority record.

Event Type (RAD Required)

The default is 'Creation' (creator). If a collection description is being created, then the word 'Collection' (collector) or 'Accumulation' (Accumulator) should be chosen.

Date (RAD Required)

The date is for the fonds or collection being created, and NOT for the Authority Record. Add dates that relate to the start and end dates of the fonds or collection, which should include inclusive dates, and can include predominant dates as well. If predominant dates are used, use the word 'predominant'.

Examples include:

- 1950 = Materials are from one year only, 1950.
- 1950-1990 = Materials are from 1950 to 1990 only.
- [ca. 1950]-1990 = Materials have an approx. earliest date of 1950 but end in 1990.
- [195?]-1990 = Materials have/probable earliest date of the 1950s, end in 1990.

- [195-]-1990 = Materials earliest date is known to be in the decade of the 1950s, end in 1990.
- 1950-1990, predominant 1955-1960 = Materials are from 1950 to 1990, but the majority are from 1955-1960.

4D. Physical Description Area

In the 'Physical Description Area', fill out the following fields:

Physical Description (RAD Required)

Include the physical extent of the materials in the fonds or collection. Use a new line (press enter) for each material type, and use metric measurements. You can enter as many as items as you want. It is recommended that the RAD phrase 'and other material' not be used, and that all materials be noted in this field.

Examples:

20 cm of textual records
50 photographs
50 photographs : b&w ; 23x46 cm
5 GB of photographs
12 3.5 inch floppy disks
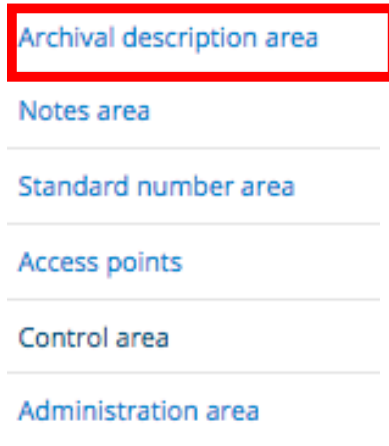
4E. Publisher's Series Area

The fields in the 'Publisher's Series Area' are used for published materials. This is primarily used for items, which may form a series.

4F. Archival Description Area

In the 'Archival Description Area', fill out the following fields:

Scope and Content (RAD Required)
Provide information about the content in the fonds or collection, including information on activities, functions, time period, subjects, etc. As well, summarize the arrangement and structure of the records.

Examples:

"Fonds consists of records created by John Jones. They all relate to his business in Vancouver from 1900-1950. They include invoices, ledgers, contracts and correspondence."
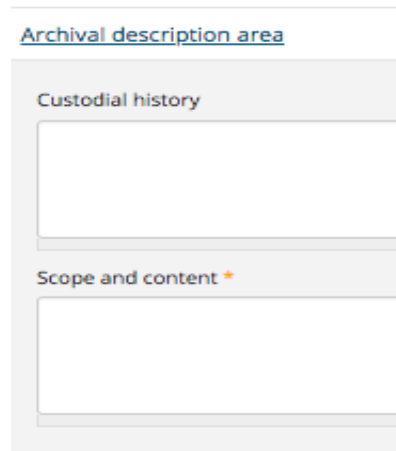
"The Collection consists of signatures from famous people who lived in BC in the early 1900s. Various people are included, such as John Jones, Jason Smith and Suzy Smith."

Archival description area

Custodial history

Scope and content *

4G. Notes Area

Archival description area

Notes area

Standard number area

Access points

Control area

Administration area

In the 'Notes Area', at a minimum fill out the following fields:

Physical Condition
Note any issues found with the records, such as mould or damage that may make the materials fragile, or impact their use.

Physical condition

Immediate source of acquisition

Arrangement

Language of material

Script of material

Language of Material

Note any languages present in the materials in the fonds or collection. Place the mouse in the field and slowly type in the language name, wait two seconds for the drop down and choose the language wanted. Multiple languages can be added.

Restrictions on Access

Note any restrictions that are present for use or access to the materials.

Terms Governing Use, Reproduction and Publication

Note any policies or procedures for use, copying or reproduction in publications, if applicable.

Availability of other formats

Restrictions on access

Terms governing use, reproduction, and publication

Finding aids

Finding Aids

Include the full URL of a website page or finding aid document if applicable.

Accruals

If more material is expected to be added to the fonds or collection, note that more accruals are expected. If no added information is expected, then note that no further accruals are expected.

Associated materials

Related materials

Accruals

4H. Standard Number Area

Archival description area

Notes area

Standard number area

Access points

Control area

Administration area

The fields in the 'Standard Number Area' are used for published materials to record ISBN or ISSN numbers.

4I. Access Points Area

Archival description area

Notes area

Standard number area

Access points

Control area

Administration area

In the 'Access Points Area', fill out the following fields:

Subject Access Points (Optional)

There is a list of Subjects to use, and they can be found at: https://www.memorybc.ca/subjects. Place your mouse in the field and start to type in the 'Subject' slowly, wait 3 seconds for the drop down list to appear and choose the Subject wanted. Multiple Subjects can be added.

Place Access Points (Optional)

There is a list of Places to use, and they can be found at:
https://www.memorybc.ca/places. Place your mouse in the field and start to type in the 'Place' slowly, wait 3 seconds for the drop down list to appear and choose the Place wanted. Multiple Places can be added.

Name Access Points (Optional)

The Authority Record added in the Dates of Creation Area is automatically added here by the system. Other entities can be added in this area that are associated with this archival description, and they are noted as Subjects. Place your mouse in the field and start to type in the name slowly, wait 3 seconds for the drop down list to appear and choose the Authority Record name. Multiple authority record names can be added.

4J. Control Area & Administration Area

Archival description area

Notes area

Standard number area

Access points

Control area

Administration area

The fields in the 'Control Area' relate to the maintenance of the description that is being created.

The 'Administration Area' does not have any fields to fill out.

5. A Note on Finding Aids

There is a Finding Aid field in the 'Notes Area'. However, there are two other finding aid options that can be used:

(1) The first is that the system will generate finding aids once the top level description is published: the 'Generate' link will now appear on the lower right side of the description under 'Finding Aid'.

- Click the 'Generate' link and the system will generate a PDF finding aid with the information that is provided in all published descriptions from the fonds or collection level down.
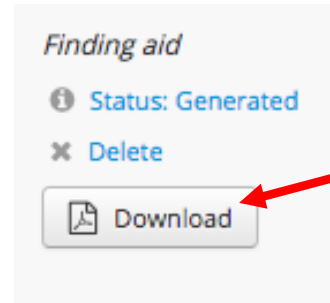
Finding aid

⚙ Generate

⬆ Upload
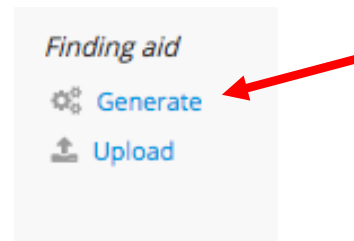
- The link will change to 'Status: In Progress', and you need to refresh the page to see the   final finding aid.

Finding aid

ⓘ Status: In progress
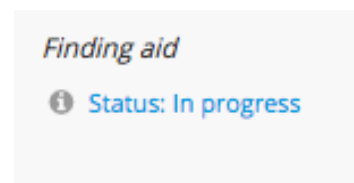
- Once the finding aid is created, the link will change to 'Status: Generated', and a Download button will appear. The public will now have access to this PDF finding aid.

The finding aid can be deleted, after logging in: click the 'Delete' button and confirm deletion and the finding aid link will go back to 'Generate'.
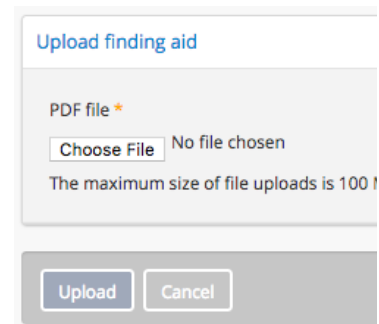
(2) The second finding aid option is to upload your own finding aid. It has to be under 500 MB and in PDF format.

- Go to the area on the lower right side of a published description and click the 'Upload' link.
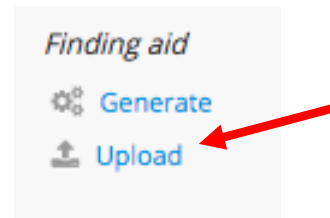
- Choose the file and click 'Upload'. The upload should only take a few minutes.

- Refresh the screen to see the Download button. This is now available to the public and can be deleted by pressing the 'Delete' button and confirming deletion.