Finding Aids: Detailed Description Guidelines

1. INTRODUCTION

This guide governs how titles, dates, publication statements, and physical descriptions are to be expressed in the detailed description of box and file lists. Standards regarding the use of capitalization, abbreviations, acronyms, and punctuation are included.

The guidelines are designed to provide consistency across all collecting areas and to present brief, concise, reader-friendly lists for researcher, donor, curatorial, collections management, and reference purposes.

The guidelines are based upon and informed by professional standards. Processors are expected to refer to *DACS, RDA*, and other appropriate cataloging standards when appropriate. For more information regarding spelling, abbreviations, and the use of particular terms, processors should also refer to the *Minnesota Historical Society Glossary & Style Guide* maintained by the Marketing & Communications Department. Refer to your desk copy of the *American Heritage College Dictionary* for spellings and abbreviations that are not covered here or in the *MHS Glossary & Style Guide*.

Many legacy inventories did not follow these guidelines. When making an addition to an existing inventory that will not be rekeyed, please try to match the style of the existing list.

2. BASE STYLE

The base style for listing a collection component should adhere to the following expression, punctuation, spacing, and indentation:

> Unit title, Month DD, YYYY – Month DD, YYYY. N physical units.
> > **RESTRICTED**.
> > Scope and content note.

Example:

> Cottonwood Lodge No. 25, 1917-1921. 3 volumes.
> > **RESTRICTED.**
> > Includes bylaws, member rosters, and meeting minutes.

3. LOCATION   <physloc> and <container>

The location of a collection should be expressed by the four-part locators given throughout the collection: row number, section number, shelf number, position on shelf. When a collection is located in A2 the locators should by expressed by a P and the number of the collection. When there are oversize components to a collection they should be expressed by the floor/row number, followed by a slash, the cabinet number and the drawer number. Microfilm locations are expressed by microfim numbers.

For digital materials that have no physical counterpart, either because the materials were acquired solely in digital format or because acquired physical materials were digitally reformatted and subsequently disposed, "Internet" should be given as the location.

The container should be expressed as the number of the box, folder, reel, or other type of container in the collection. It is not necessary to have box numbers for all collections as many of the collections are constantly being added to and the consistency of the box numbering cannot always be maintained. If there are container types other than boxes: folder, reel, item, image etc. they can be expressed as container types. For digital materials, no container is given.

Examples:

Location	Box
148.D.12.4F	12

Location	Box
P1201	6

Location	Folder
105/ov5 Drawer 2	5

Location	
A2/ov3 Drawer 8	

Location	**Reel**
M346	3

Location	**Reel**
SAM 455	18

Location	**Reel**
SAM 457 (Room B-151)	2

Location	**Reels**
Shelf S.1.F (Room B105.7)	3-4

Location	**Reel**
SAM 25 (Chaney Room)	1

Location	**Box**
Room 485	41

Location
Internet

4. TITLES <unittitle>

Whenever possible, collapse files and folders into larger sets in order to group like things together and to provide a minimal description. Titles are collapsed not only to gain processing economies but also to improve a user's ability to browse our lists quickly and comprehensively.

Folder titles can be difficult to interpret. Collection creators often use very cryptic or lengthy labels that fool us into focusing too much attention on the uniqueness of each individual folder. However, not every folder needs to be listed when like files can be grouped together into a common and larger set.

When physically processing a set of files, a file divider can be inserted to identify sets of files that have been grouped together if it is needed to clarify box contents. Scope notes can be added to the inventory to describe the different types of material or information within the whole set.

Collapsing and grouping units is a particularly practical and efficient method for the following kinds of files:

Committee files	News clippings
Correspondence	Photographs and albums
Court case files	Press Releases
Diaries	Publications
Financial and tax records	Reports
Legal documents	Scrapbooks
Maps	Speeches

Meeting files   Subject and topical files
                Minutes

Files may be arranged according to an alphabetical, chronological, geographical, or numerical scheme. Titles stated within the detailed description must adhere to the chosen organizational scheme.

Titles may be shortened or modified in order to best represent the arrangement of a collection and to present a clear, concise list. Series and sub-series can be added where needed to help group things together.

Follow the principles in DACS and give title information at the level where it is most appropriate. Most often, information that repeats title data listed in a higher component can be eliminated from a lower component.

The examples below show how a set of subject files was collapsed into two different lists that a researcher can more easily browse. While the examples below are only hypothetical, every collection will contain file sets where these examples are relevant.

Example A. Individual Folder Labels

Example A shows a list of files with each individual folder listed under its folder label. Notice how both the alphabetical order of the files and the larger topical sets within the list are not apparent:

   Apple sales, 1976.
   Sales reports, 1977.
   Macintosh apples, 1972-1980.
   Apple pests, 1972.
   Pest control, 1973-1974.
   Refrigeration of apples, 1974-1976.
   Apple shipping and transportation, 1973-1979.
   Banana sales reports, 1971-1973. 3 folders.
   Sales reports for bananas, 1974-1975.
   Organic farming, 1972-1974.
   Organic farms, 1974-1982.
   Banana pest control, 1978.
   Pesticides for bananas, 1979.
   Cabbage sales, 1972-1976. 5 folders.
   Reports of cabbage sales, 1977-1979. 3 folders.
   Organic farms, 1974-1976.
   Cabbage pests, 1972-1973.
   Pesticides used on cabbage crops, 1974-1976.
   Pests and insect control, 1977.

Example B. Collapsed Titles: Minimal Detail

This example shows the same list as shown in Example A above. Notice how the many individual files and folders were collapsed into three much larger file sets:

> Apples, 1972-1980. 7 folders.
> Bananas, 1974-1982. 8 folders.
> Cabbages, 1972-1979. 12 folders.

Example C. Collapsed Titles: Full Detail

In this example, the file sets listed in Example B were given greater detail. Notice that the individual folders listed in Example A were shortened here in order to group like things together and to present a clear alphabetical order:

> Apples:
>> Apple sales reports, 1976-1977. 2 folders.
>> McIntosh apples, 1972-1980.
>> Pest control, 1972-1974. 2 folders.
>> Refrigeration, 1974-1976.
>> Shipping and transportation, 1973-1979.
> Bananas:
>> Banana sales reports, 1971-1975. 4 folders.
>> Organic farming and farms, 1972-1982. 2 folders.
>> Pest control and pesticides, 1978-1979. 2 folders.
> Cabbages:
>> Cabbage sales reports, 1972-1979. 8 folders.
>> Organic farms, 1974-1976.
>> Pest control and pesticides, 1972-1977. 3 folders.

For large series or units that have the same title, but different dates, and are stored next to each other in the same box, do not list each file, folder, or volume. Instead, collapse the description, give a full date span, and list the number of folders or volumes. Bulk span dates may be included when necessary to clarify contents.

Examples:

> Minutes, 1906-1909, 1913-1976. 40 folders.
>
> *Not*
>> *Minutes, 1906-1909. 4 folders.*
>> *Minutes, 1913-1976. 36 folders.*

> Correspondence, 1942-1990 (bulk 1958-1972). 20 folders.
>
> *Not*
>> *Correspondence, 1942-1946. 2 folders.*
>> *Correspondence, 1958-1972. 15 folders.*
>> *Correspondence, 1979-1982.*

Correspondence, 1986-1990. 2 folders.

If alphabetically-lettered volumes (Volume A) were kept over a continuous span of years, collapse the listing and describe as: Volumes A-C, 1913-1935. 3 volumes.   Only split the description if the dates are not continuous or if the volumes are stored in multiple boxes.

Example:

105.I.6.2F	1	Volumes A-C, 1913-1935. 3 volumes.
105.I.6.3B	2	Volumes D-F, 1913-1935. 3 volumes.

> *Not*
> *105.I.6.2F 1   Volume A, 1913-1935.*
> *Volume B, 1913-1935.*
> *Volume C, 1913-1935.*
> *105.I.6.3B 2   Volume D, 1913-1935.*
> *Volume E, 1913-1935.*
> *Volume F, 1913-1935.*

Make individual listings only when the components are stored in different boxes or when readily-identifiable gaps would make the date expression too long to read at a glance.

Example:

105.I.6.3B	2	Budget message and proposed budget. 1989. 1 volume.
105.I.6.4F	3	Budget message and proposed budget, 1990. 1 volume.

In cases where two or more individual folders may be listed as a set, use a series title followed by file listings.

Examples:

Subject files:
>Apples, 1956.
>Bananas, 1955-1958.
>Cucumbers, 1956-1958.

Correspondence:
>Mrs. X, 1976.
>Mr. X, 1976.

> *Not*
> *Subject file: Apples, 1956.*
> *Subject file: Bananas, 1955-1958.*
>
> *Correspondence with Mrs. X, 1976.*

Correspondence with Mr. X, 1976.

In cases where large runs of files are collapsed, enter a space dash space between titles.

Examples

Apples – Cucumbers.
Anoka – Beltrami.

> *Not*
> *Apples-Cucumbers.*
> *Anoka-Beltrami.*

For letters and numbers, use just a dash.

Examples:

A-Z.
1-100.

5. DATES   <unitdate>

Dates are stated after unit titles and before the number of physical units.

Example:

Annual reports, 1976-1978. 3 volumes.

> *Not*
> *1976 (annual report). 1 volume*
>
> *1976 Annual Report. 1 volume.*
> *1977 Annual Report. 1 volume.*
> *1978 Annual Report. 1 volume.*

Dates are stated using the expression Month DD, YYYY – Month DD, YYYY. Months are spelled out. Days of the month are expressed in numerals following the name of the month. The statement ends with a period.

Examples:

June 1951.   *(no comma between month and year)*
June 24, 1951.   *(not 24 June 1951)*
June 24-27, 1951.   *(not June 24-June 27, 1951)*
September-October 1951.   *(no spaces on either side of the dash)*
September 1951-October 1953.   *(no spaces on either side of the dash)*
August 19-September 27, 1967.   *(not August 19, 1967–September 27, 1967)*

1951-1953. *(not 1951-53)*

For unknown and estimated dates, assign consistent date statements using the terms "approximately" or "undated". DACS sections 2.14.12 and 2.14.15 provides various types of date statements for estimated date ranges and single dates, but emphasizes that statements should be applied in a clear and consistent fashion.

Examples:

approximately 1987.
approximately1972-1987.
approximately 1860s
undated.
undated–1972.
undated, 1972-1974.

Not

no date.
n.d.
circa 1987.
ca. 1930.
c. 2001.
probably 1840.

When a date span for any given year or span of years includes a full range from January through December, only the year or years are listed.

Examples:

1909.
1909-1912.

Not
January-December 1909.
January 1909–December 1912.

Months are only expressed when the span is not complete.

Examples:

July 1912-Feburary 1915.
March 1924–1927. *(this means March 1924-December 1927)*

Fiscal year: Always spell out Fiscal Year; both words capitalized.

Dates given in lists are not placed in parentheses except when used to qualify bulk dates or when particular items in a note.

Title example:

Nos. 1-649, December 1919–May 1934. 22 folders.
Correspondence, 1907-1967 (bulk 1938-1954). 60 folders.

Not
Nos. 1-649 (December 1919–May 1934). 22 folders.
Correspondence (primarily 1938-1954), 1907-1967.

Scope note example:

Miscellany, [1890s]–1958.

County teachers examination first grade certificate (1890s), tax rate sheets (1926, 1958), sample report cards (193-), correspondence relating to the consolidation of the Vernon Center schools (1952), a teachers newsletter (1955), and lists of school officers (1957).

Centuries are always expressed as an ordinal number.

Example:

18th century
21st century

6. PHYSICAL DESCRIPTIONS / UNIT QUANTITIES   <physdesc>

Statements regarding the physical description of a component are provided to detail the number and type of physical units that comprise each component.

Descriptions of physical quantities immediately follow the title and date statement.

The quantity is always spelled out fully, not abbreviated, and the number is first. Though you may find older inventories that used parentheses, do not enclose quantity in parentheses.

Examples:

2 cubic feet *(not 2 cu. ft. or 2 cf or 2 c.f.)*
2 boxes   *(not 2 b., boxes 2, or B2)*
2 folders   *(not 2 f., folders 2, or F2)*
2 volumes   *(not 2 v., 2 vol., 2 vols., V2, or 2 bound volumes)*
2 volumes, unboxed (not 2 v. loose on shelf, 2 unboxed volumes, or 2 v., shelved loose)
2 microfiche   *(not 2 fiche)*

2 microfilm reels   *(not 2 mf, reels 2, or 2 microfilms)*

For types of media that may require additional descriptive detail, such as sound and visual recordings or electronic files, use the specific material designations recommended in the content standards appropriate to the material in hand, i.e., *RDA*, *Archival Moving Image Materials*, *Cartographic Materials, Graphic Materials,* etc.

Follow a

Examples:

> 1 DVD
> 2 audio tape reels
> 2 sound cassettes
> 2 videocassettes (VHS)

Folders: A physical quantity of 1 folder is usually implied and is never written out, *except* when a set of multiple folders is split between two boxes.

Example:

Location   Box
112.F.6.7B   4   Minutes, 1972-1977. 7 folders.
112.F.6.8F   5   Minutes, 1978. 1 folder.

In extremely rare cases, multiple items within a single folder or multiple folders are identified when the items within the folder(s) are individually listed.

Examples:

With inclusive dates:

> Sporting pamphlets, 1948-1967. 3 items in 1 folder:
>   Go, team, go.
>   Cheerleader's guide.
>   Dress code.

With each individual item dated:

> Military commissions and appointment papers. 22 items in 1 folder:
>   Summary of military record, undated.
>   Cadet appointment, West Point Military Academy, June 30, 1827.
>   Colonel appointment, July 1858.

Multiple folders (use with either date type above):

> Publications by medical staff. 20 items in 2 folders:
>   [List all the items without breaking between folders].

Volumes: When a collection consists of both bound volumes and other formats, the number of volumes is always expressed, even if the quantity is only one, in order to indicate that the component is not contained within a folder.

The term "volume" is used to describe a wide variety of bindings. No distinction is made between post bound volumes, loose leaf notebooks, spring casings, chap books, saddle staples or other types of bindings that contain materials in a single volume.

The term "volume" implies bound; hence, there is no need to use the phrase "bound volume."

Example:

Articles of incorporation, 1976. 1 volume.

When a collection consists entirely of bound volumes, the number of volumes is expressed only for components that consist of two or more volumes.

Volumes and folders:

When you have volumes and folders, use "and." Also use "and" when you have folders and other formats, i.e. binders.

Examples:

PTA Minutes, 1930-1947, 1952-1958. 2 folders and 1 volume.
Metropolitan. 4 folders and 1 volume.

Not
4 folders. 1 volume.
4 folders, 1 volume.
4 folders; 1 volume.
4 folders and 1 binder.

Volumes in folders:

Volumes are often placed in folders or other types of protective enclosures for support and abrasion resistance. Therefore, it is not useful to state "1 volume in 1 folder" or "1 volume in phase box."

When multiple volumes are housed in a single folder, such as several small dairies or memorandum books, stating the number of volumes may be useful.

Example:

Memoranda and diaries, 1897-1899, 1900-1901 4 volumes in 1 folder.
Transcripts, 1970-1974. 38 volumes.

Not
Cashbook, 1916. 1 volume in 1 folder.

Transcripts, 1970-1974. 38 volumes in 38 folders.

Dimensions: Use Arabic numerals and height x width in inches, feet, or yards to indicate depth, height, length, and width. Although *RDA* uses centimeters, dimensions in archival descriptions are not expressed in centimeters.

For paper materials, round fractional dimensions up to the next whole number. When sizes vary, give the largest dimension followed by the expression "or smaller."

For audio, moving image, and electronic media, follow standard measurements and include fractions.

Abbreviations

When giving sound or color characteristics, use the spellings listed below:

> black and white
> color
> silent
> sound

When giving the running time of a sound recording or moving image, do not abbreviate the duration but use the spelling listed below:

> hour, hours
> minute, minutes
> second, seconds

Abbreviate the following units of measurement as shown below when giving dimensions:

> inch or inches   in.
> linear   lin.
> millimeter   mm.
> yard or yards   yd.

Do not abbreviate the following types of physical units:

> box, boxes
> cubic
> drawer, drawers
> folder, folders
> foot, feet
> leaf, leaves
> microfiche
> negative, negatives

page, pages
photograph, photographs
photocopy, photocopies
reel, reels
roll, rolls
sheet, sheets
tube, tubes
videocassette, videocassettes
volume, volumes

Example:

Portraits, 1924-1980. 30 photographs in 3 folders, color, black and white; 8 x 10 in. or smaller.

Sound and Visual Materials

For collections or significant components composed wholly of sound and visual materials, greater item detail may be given in the detailed description.

Give publication data for items that were produced for mass distribution.

Give specific item-level information about the number of recordings, the format of material, manifestation, technical specifications, duration, sound and color characteristics, and physical dimensions.

Delineate the existence of master, duplicating, and user manifestations if there is more than one copy. List master copies as "master copy" before proceeding through successive derivatives. If only one copy exists, there is no need to refer to it as a master/submaster/user.

Present the data in the following order:

Title statement. Place of publication: Publisher, Date. Item quantity / manifestation / specific material designation / (technical specification) / (running time)**:** / sound characteristic, / color characteristic**;** / dimensions.

Follow the standards in *ISBD* for marks of punctuation in order to indicate the type of information that is being listed. However, do not enter a space before a mark of punctuation as directed by *ISBD* to separate subtitles, sound and color characteristics, and dimensions. Enclose technical specifications and running times in parentheses.

Examples:

Visions and victories: celebrating 50 years of creating opportunities. Minneapolis: Arc of Hennepin County, 1996. 1 videocassette (VHS) (25 minutes, 3 seconds); 1/2 in.

Rights and power, October 16, 1992. 1 film reel (2 hours, 10 minutes): silent, black and white; 16 mm.

<u>Master and derivative manifestations of the same format</u>

To minimize repetitive data, characteristics that are common to all manifestations need only be stated once.

<u>Examples</u>:

1 master and 1 user videocassette (VHS) (20 minutes) : sound, color; ½ in.

<u>Master and derivative manifestations of differing formats</u>

Delineate copy specific information for each manifestation when an item is represented by more than one format. Provide item manifestation details, specific designations, and technical specifications that vary from one format to another. Give sound and color characteristics that are common to each format only once in the description for the first manifestation.

<u>Example</u>:

3 master film reels (45 minutes each): silent, black and white; 16 mm., 1 submaster videocassette (Betacam SP) (135 minutes); 1/2 in., and 1 user videocassette (VHS) (135 minutes); 1/2 in.

7. CAPITALIZATION

Capitalize only the first word and any proper nouns of a file, folder, or volume list. All other words are spelled out in lower case.

<u>Examples</u>:

The Bible. 1 volume.
Articles of incorporation.
Minutes and agenda packets, 1977-1989. 12 folders.
Powderhorn Park demonstration, June 13, 1964.
Red Cross nursing stations, 1952-1953.
CBS interview transcripts, 1968.
News clippings from the *Cook County Herald,* 1967-1972.

Published or official titles: Capitalize the first word and any proper nouns within the title. Also capitalize the first word of the title of any part, section, or supplement. All other words are spelled out in lower case.

<u>Examples</u>:

Chips from a wilderness log.
Once there were castles: lost mansions and estates of the Twin Cities.
Tendencies in modern American poetry.
Cambrian history of the Grand Canyon Region. Part I. Stratigraphy and ecology of the Grand Canyon Cambrian. Part II. Cambrian fossils of the Grand Canyon.

See RDA, Appendix A, A.4. Titles of Manifestations for more clarity. See also 2.3.1.7 Titles of Part, Section, or Supplement for more detail on complex multi-part or multi-section titles.

Officers: Titles of state, county, and local officers are capitalized when a title is used with a specific person's name, i.e., Governor Wendell Anderson, or as the title of the office, the Office of the Governor. In general usage, such as "the governor was among those listed at the event" or "he was executive director of," the title may be spelled in lower case.

8. ABBREVIATIONS

Do not abbreviate any of the words listed below unless the abbreviation is part of an established corporate name:

association
committee
commission
company
corporation
county
department
fort
memoranda
miscellaneous
photograph(s)
railroad
railway
society
township

Unless abbreviations occur in an established corporate name or a published title, the following apply.

Addresses: Use Ave., Blvd., and St. with numbered addresses, otherwise spell them out (Kellogg Boulevard haunted buildings). Spell out Road or Lane.

Examples:

345 Kellogg Blvd.

Kellogg Boulevard haunted buildings
1675 North McKubbin Road

And/&: Use ampersands (&) only where they are part of an established corporate name or a published title. In all other cases spell out the word "and."

Examples:

Campaign Finance & Public Disclosure Board
Faribault State School and Hospital
Department of Trade and Economic Development
Minneapolis & St. Louis Railroad
Minnesota Board of Water & Soil Resources

Calendar: Spell out months and days of the week.

Examples:

January
September
Tuesday
Saturday

Forms of Address: Use abbreviations for Mr., Mrs., Ms., Dr. Spell out other forms, e.g., Monsignor, Reverend, Sister.

Generational Designations: Use abbreviations for Jr., Sr.

id est (that is): i.e. is always set off by commas: , i.e.,

Example:

Preschool children, i.e., five-year-olds

Legal cases: Abbreviate versus as "v," not as "vs."

Example:

Williams v State of Minnesota   *(not vs. or versus)*

Measurements: Abbreviations are not used in physical descriptions to express footage or dimensions. *See 6. Physical Descriptions / Unit Quantities.*

Military Rank: Spell out the first occurrence of a military rank and abbreviate thereafter.

Numbered Files: The word "number" is not spelled out but is abbreviated as No. Do not use a pound sign (#). The plural abbreviation is used for collapsed descriptions.

> Case file no. 1212.
> No. 1547.
> Nos. 1300-1349.

Office Holders: Titles of state, county, or local officers are never abbreviated.

Place Names: Spell out the names of all countries, states, counties, and cities. Spell out United States unless it appears in an established corporate name.

Exceptions:

> Use D.C. for District of Columbia.
> Use St. for Saint.

Examples:

> Canada
> Lake of the Woods County
> Minneapolis
> North Dakota
> St. Paul
> St. Peter
> United States
> Washington, D.C.

9. ACRONYMS

Acronyms should not be used unless they are either so commonly known that anyone would understand them (IBM, CBS, etc.) or they have been previously qualified by brackets. Spell out the first instance and give the acronym in brackets, e.g., Department of Natural Resources [DNR]. Acronyms have no spaces or periods between letters.

10. PUNCTUATION

All title statements end with a punctuation mark, either a period, a colon, or a question mark.

Insert a comma before "and," "nor," "or" connecting the last two elements in a sequence.

Example:

> Correspondence, deeds, and financial records, 1976.

Include spaces between the initials of a person's name.

Example:

> J. W. Jones.

To qualify the contents of a single folder title, use a colon before the file title.

Example:

> Photographs: University of Minnesota, 1976.

Ellipsis may be used to shorten up a very long title:

Examples:

> A bill to consent to an agreement between the State of Minnesota and the Province of Manitoba, Canada, providing for an access highway to the Northwest Angle . . .
> Law designating winter should only last ten days. . . .
> What a long strange trip it's been . . . , 1976.

Numbers: Use commas to separate numbers larger than ten thousand.

Examples:

> 1200.
> 12,000.

Series of numbers: When listing inclusive runs of numbered files, include all digits and give the full numeric range.

Examples:

> 711-713
> 1200-1249
>
> *Not*
> *711-13*
> *1,200-249*

11. SERIES AND SUB-SERIES TITLES

Depending upon the intellectual arrangement and complexity of a collection, different header styles are used to display series and sub-series titles at the first and second component levels.

Flat Collections <c01>

A flat display is used for collections that do not evidence a complex intellectual arrangement. In this style, all components are indented within the box list and location and box numbers may be given at any component level.

To indicate a set of files within a flat collection, end the series title with a colon.

Breaks in location and box numbering are expressed at each point where they occur. Locator and box numbers for series that begin in a different box from preceding files are listed with the series title.

Example:

Location	Box	
Location	**Box**	
151.G.14.4F	23	Articles of incorporation and bylaws, 1906-1915.
		Annual reports, 1910-1935.
Location	**Box**	
151.G.14.5B	24	Branch organizations:
		Benton County, 1911-1930.
		Blue Earth Pioneers, 1902-1925.
Location	**Box**	
151.G.14.6F	25	Cottonwood Lodge No. 25, 1917-1921.
		Dakota County, 1913-1932.
		Member rosters, 1905-1940. 35 volumes.
Location	**Box**	
151.G.14.7B	26	Subject files:
		Industrial relations, 1909-1913.
		Iron Range mining accidents, 1902-1915.
		Strikes, 1906.

Simple Collections <c01 level="series">

Simple collections are arranged in two or more discrete series.

The title of each series is not indented but is justified at the outer left margin. Appropriate upper and lower case letters are used throughout the title with only the first letter of each word given in upper case. The series title is displayed in bold face. No period or colon is added to the end of the series title.

Location and box numbers are not listed at the c01 series level, but are listed at the second level.

Example:

Branch Organizations

Location	Box	
Location	**Box**	
151.G.14.5B	24	Benton County, 1911-1930.
		Blue Earth Pioneers:
		Bylaws, 1902.
		Member rosters, 1915-1925.
Location	**Box**	

151.G.14.6F	25	Cottonwood Lodge No. 25, 1917-1921.
		Dakota County:
		Bylaws, 1913, 1920.
		Member rosters, 1915-1932.

Subject Files

Location	Box	
151.G.14.7B	26	Industrial relations, 1909-1913.
		Iron Range industrial development, 1908-1921.
		Mining accidents, 1902-1915.
		Strikes, 1906.

Complex Collections <c01 level="series"> <c02 level="subseries">

Complex collections are arranged in two or more series, each with two or more sub-series.

Series and sub-series titles are both displayed at the outer left margin.

Words in a series title are all given in all upper case letters. Words in sub-series titles are given in appropriate upper and lower case letters with only the first letter of each word in upper case. (Note: for EAD inventories, Web display will automatically change capitalization according to current web xslt and print css stylesheets. Processors should adhere to these guidelines rather than what they might see in earlier inventories or on the Web.)

Both series and sub-series titles are displayed in bold face.

When a unit is listed as a series or sub-series within a complex collection, no period or colon is added to the end of the series or sub-series titles. Colons are used for the titles of sub-series that are listed at the third hierarchical level.

Location and box numbers are not listed at either the c01 series or c02 sub-series levels, but are listed at the third component level.

   Example:

VICE PRESIDENTIAL PAPERS

Administrative Assistant for Domestic Policy

Location	Box	
151.B.15.2F	35	Industrial relations, 1977-1979.
		Iron Range industrial development, 1975-1980.
		Mining accidents, 1976-1980.
		Strikes, August 1976.

Press Secretary

Location	Box	
151.D.6.9B	58	Press releases, 1976-1979.
		Speaking engagements, 1977-1981.
		Speech texts, January 22-August 12, 1979.

151.D.6.10F   59   Speech texts, August 15, 1979-May 2, 1980.

12. PUBLISHED MATERIALS

In rare cases when the titles of published materials are individually listed, give the place of publication, publisher, and date immediately following the title. Follow bibliographic rules in *RDA* when forming unit titles at this great a level of detail, but close up spaces in *RDA* punctuation.

Examples:

Ryberg, Clyde N. Big Fork River: from Bowstring Lakes, Itasca County to Craigville, Koochiching: survey in August 1963. Minneapolis, Minn.: North Central Marine Association, [1963?].

Metropolitan policy and metropolitan development: a proposal for governmental organization in the Twin Cities area. Minneapolis, Minn.: Metropolitan Development Guide Committee, 1968.

13. NOTES

Qualifying descriptions that explain the arrangement, scope and content, or alternative formats of a unit are entered in a note following the title and date.

Examples:

Annual report, 1976.
    Includes statistical report.

Not
    Annual report (includes statistical report), 1976.
    Annual report, 1976 (including statistical report).

Correspondence, 1975-1978.
    Arranged in reverse chronological order.

Common notes include:

Arranged alphabetically.
In reverse chronological order.
Incomplete.
Issues missing.
Indexed.
Unarranged.
Also available in pdf format.
Selected images are also available in the Photo & Art Database.

Refer to the EAD Tag Library (http://www.loc.gov/ead/tglib/index.html) and use the appropriate EAD element when encoding notes in an EAD inventory.

Notes indicating empty space in partial boxes are made as follows:

Grimm Farm, Carver Park Reserve, Friends and Stewards Event, October 6, 2001.
[0.5 cubic feet empty, letter]

Zieglar Motor Company: Income tax records, mortgage, accounts, agreements, 1919-1948.
[0.7 cubic feet empty, legal]

Rainy Lake Watershed, 1928.
[0.5 cubic feet empty, double-oversize]

Notes about empty space are coded as other descriptive data *<odd>* at the point where the last component in the box is listed.

14. RESTRICTIONS

When a single restricted file is surrounded by unrestricted files in a list, enter a restriction statement in all capital letters and bold face.

<u>EAD practice</u>: In EAD inventories, restrictions are encoded in either <accessrestrict> or <userestrict>. The xslt stylesheet will output the statement in a line underneath the <unittitle>.

<u>Examples</u>:

Case file no. 1623.
RESTRICTED.

Advertising and publicity materials, 1931-1979.
COPYRIGHT RESERVED.

Conversely, when a single unrestricted file is surrounded by restricted files in a list, especially where most of the collection or series is restricted, or where certain files in a closed file set are open, enter the statement OPEN FOR USE in all capital letters and bold face. End the statement with a period.

Examples:

Paper index to the microfiche cards, 2007.
OPEN FOR USE.

The Ramones, September 28, 1981.
OPEN FOR USE.

When files with multiple restrictions exist in a single inventory, enter a restriction statement in all capital letters and bold face with the date or description of the restriction.

Examples:

Aitkin to Yellow Medicine counties, 1907-1968. 11 folders.
RESTRICTED: 75 Years.

Birth certificates, 1927-1975. 3 volumes.
RESTRICTED: 100 Years.

Board meeting agendas, 2006.
Class B Records: Restricted for 10 years from date of creation.

Grant Committee dockets, February and June 2006.
Class C Records: Restricted for 50 years from date of creation.

See the processing manual chapter on restrictions for additional detail regarding the expression of restriction statements.

15. RESERVE ITEMS

If the collection or part of the collection has been located in Reserve, then an Access Restriction statement <accessrestrict> should be added to the finding aid. Always include a <head> element stating "Access Restrictions:" and choose one of the statements below according to the appropriate holding area:

For Government Records:

Access Restrictions:

Access to and use of reserve materials requires the permission of the State Archivist.

For Manuscripts or Sound and Visual Collections:

Access Restrictions:

Access to and use of reserve materials requires the curator's permission.

Listings of single items that have considerable monetary value and that have been removed to Reserve storage may include more detailed information. The following abbreviations may be used in scope notes to describe these items.

ALS: autograph letter signed (both body of letter and signature handwritten by same person)

LS: letter signed (body of letter typed or written by someone other than person signing letter)

TLS: typed signed letter is a more specific alternative to LS

ADS: autograph document signed (non-letter item handwritten and signed by same person)

DS: document signed

AMsS: autograph manuscript signed (for literary works)

MsS: manuscript signed

Fol. : folio (roughly legal size)

4to: quarto (roughly 8 inches x 12 inches)

8vo: octavo (roughly 6 inches x 8 inches)

16. MISSING ITEMS

Items may be missing from collections in one of three ways.

- When an item was received by MHS and inventoried but is now missing enter "Missing" in the location information followed by the date the item/s were found to be missing.

  Location
  Missing, March 2008

- Systematically numbered files in which individual files are not present should be entered as a full component <unittitle> in italics:

Location	Box
126.C.6.4F	2

  No. 26. Glacier National Park, 1976-1979.
  No. 27. Missing.
  No. 28. Yellowstone National Park, 1974-1976.

- Groups of files that are missing in a run should be entered in the scope note:

Location	Box
123.H.16.2F	6

  No. 135. 1848-1852. 3 folders.
  Missing Nos. 136-148.

17. OFF SITE STORAGE

Items may be stored off site at the 1500 Mississippi building. If the collection is to be stored off site:

- Florescent yellow locator labels should be used.

- Locator grids should be consulted for space locations in the 300 ranges.

- An Access Restriction statement <accessrestrict> should be added to the finding aid:

  Access Restrictions:

  This collection is located off site in Remote Storage. Advance arrangements are required in order to view its contents. Please consult the reference staff for more information.

- The advance arrangements link goes to a web page (http://www.mnhs.org/library/about/offsite.htm) that is managed by the reference department. Let reference know when a collection has been stored off site so that they may update this web page.

18. CLOSED ORIGINALS

If the collection or part of the collection has been digitized or microfilmed and access to the originals has been closed, then an Access Restriction statement <accessrestrict> should be added to the finding aid. Always include a <head> element stating "Access Restrictions:" and choose one of the statements below according to the appropriate holding area. If only part of the collection has been digitized or microfilmed, state that portion of the collection in the statement (example: Original correspondence, 1913-1925 is closed):

For Government Records:

Access Restrictions:

Originals are closed. Access and use requires the permission of the State Archivist. Please consult the reference staff for more information.

Digitized originals are closed. Access and use requires the permission of the State Archivist. Please consult the reference staff for more information.

Microfilmed originals are closed. Access and use requires the permission of the State Archivist. Please consult the reference staff for more information.

For Manuscripts or Sound and Visual Collections:

Access Restrictions:

Originals are closed. Access and use requires the curator's permission. Please consult the reference staff for more information.

Digitized originals are closed. Access and use requires the curator's permission. Please consult the reference staff for more information.

Microfilmed originals are closed. Access and use requires the curator's permission. Please consult the reference staff for more information.