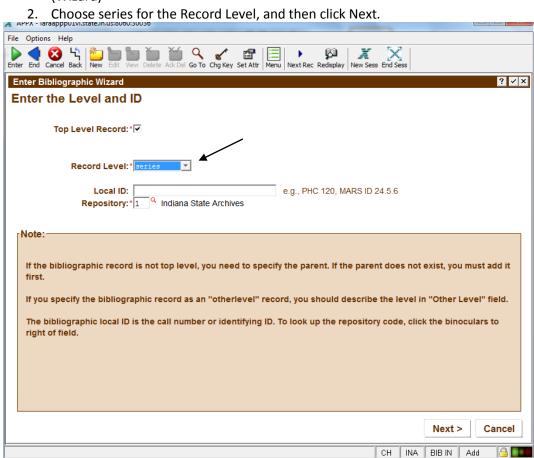
## Adding a new series

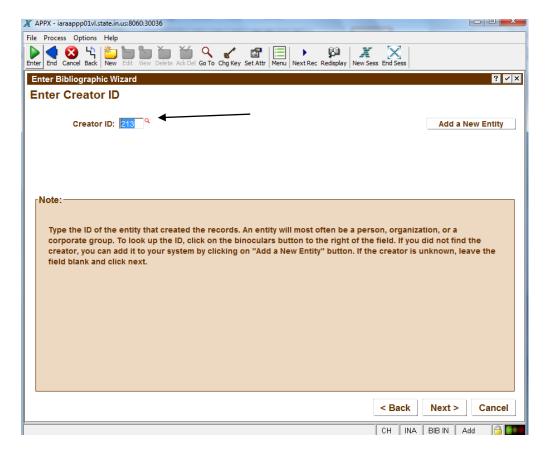
A series is a unique identifier for a certain type of record created by one agency. There is one series for Minutes created by the Arts Commission, and a different series for Minutes created by the Attorney General's Office. If the archives has never received Minutes from the Arts Commission before, the series will not exist in AXAEM. Before you can continue with the accession, you must create the series.

Before you add a series, be *absolutely sure* that it does not already exist. Check the entity list to make sure the agency you need isn't the previous name of another agency. There should not be two different series for records from IARA and ICPR. Consult with Claire if you have any doubts.

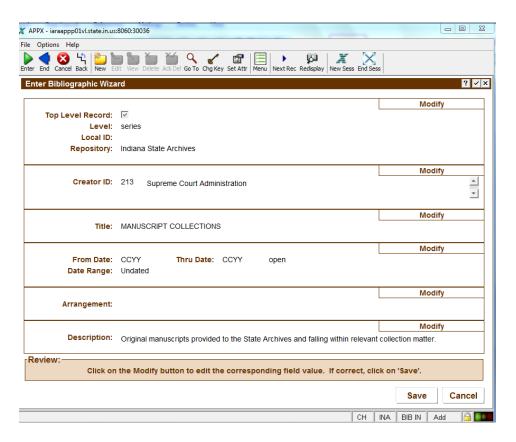
1. From the Main Menu, choose Bibliographic Records, and then Add New Bibliographic Record (Wizard)



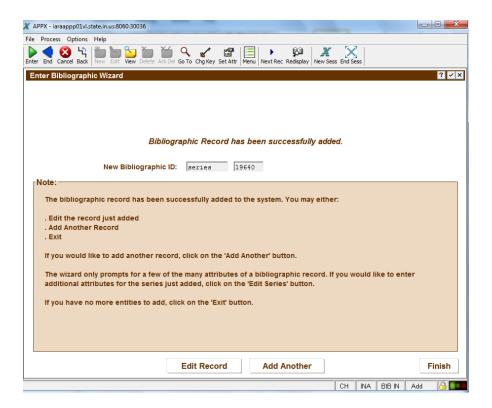
3. Use the Magnifying glass to search for the correct entity, whether it is an agency, an agency and division, or agency, division and subdivision. After filling in the entity ID, click next.



- 4. The next screen will ask you to fill in the Bibliographic Title. This should match the retention schedule exactly.
- 5. Click next and fill in the date range if you know it. Remember, this is not the date range of a single accession, but the date range of the series itself. You will often just write "Undated."
- 6. Next, fill in the arrangement if you know it. Again, this means that the entire series is arranged in the same way, not just this accession, so it may be left blank.
- 7. Next, fill in the description. This should be taken directly from the retention schedule.
- 8. After filling in all of this information, you will reach the following screen:

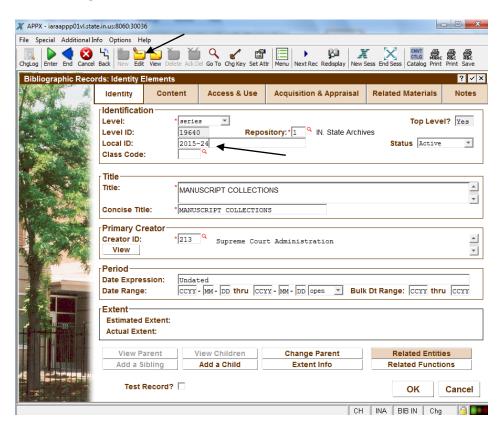


9. Check the information and click Save.



10. Click Edit Record.

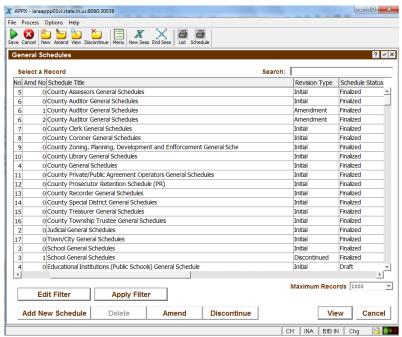
11. Choose Edit at the top of the screen, and then fill in the Local ID with the record series you are using.



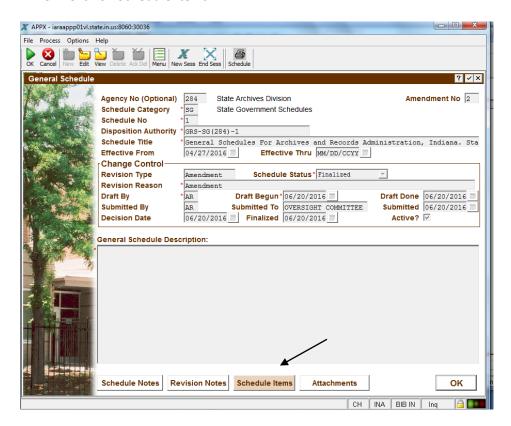
12. Be sure to record the series number, and then click Ok, and then Finish.

You have now created a series, and must link it to a retention schedule.

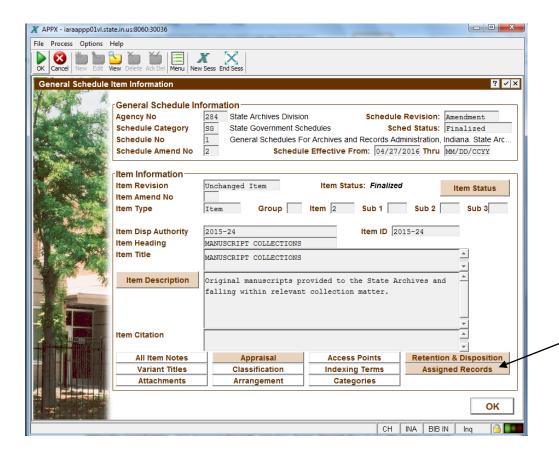
- 1. From the Main Menu, click Schedules, and then Maintain General Schedules.
- 2. Double click on the appropriate schedule. There may be several schedules for one entity: an initial schedule, and amendments. Choose the latest finalized amendment.



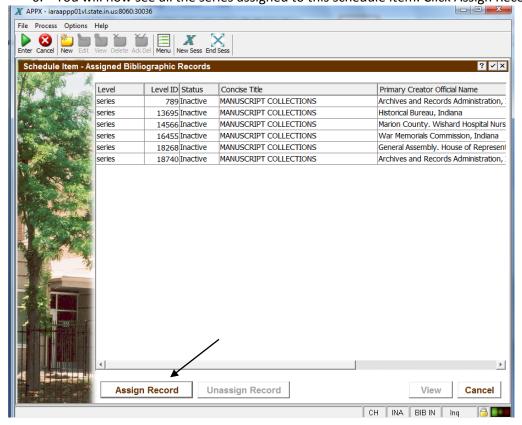
Click on Schedule Items.



- 4. Double click the item that you are linking this series to. This will bring you to the General Schedule Item Information screen.
- 5. Click Assigned Records.



6. You will now see all the series assigned to this schedule item. Click Assign Record.



7. Change the level ID to series, and then type in the series that you created earlier. If you don't remember the number, you can look it up by keyword or creator. Click search, and then select the series you just created. It will now be linked to the schedule.

