

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)
2. Choose series for the Record Level, and then click Next.

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.

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File Process Options Help

Enter End Cancel Back New Edit View Delete Ack Del Go To Chg Key Set Attr Menu Next Rec Redisplay New Sess End Sess

Enter Bibliographic Wizard

Enter Creator ID

Creator ID: 213

Add a New Entity

Note:

Type the ID of the entity that created the records. An entity will most often be a person, organization, or a corporate group. To look up the ID, click on the binoculars button to the right of the field. If you did not find the creator, you can add it to your system by clicking on "Add a New Entity" button. If the creator is unknown, leave the field blank and click next.

< Back Next > Cancel

CH INA BIB IN Add

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:

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Enter Bibliographic Wizard ? ✓ ✕

Top Level Record: <input checked="" type="checkbox"/> Level: series Local ID: Repository: Indiana State Archives	Modify
Creator ID: 213 Supreme Court Administration	Modify
Title: MANUSCRIPT COLLECTIONS	Modify
From Date: CCYY Thru Date: CCYY open Date Range: Undated	Modify
Arrangement:	Modify
Description: Original manuscripts provided to the State Archives and falling within relevant collection matter.	Modify

Review:

Click on the Modify button to edit the corresponding field value. If correct, click on 'Save'.

Save Cancel

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9. Check the information and click Save.

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Enter End Cancel Back New Edit View Delete Ack Del Go To Chg Key Set Attr Menu Next Rec Redisplay New Sess End Sess

Enter Bibliographic Wizard ? ✓ ✕

Bibliographic Record has been successfully added.

New Bibliographic ID: series 19640

Note:

The bibliographic record has been successfully added to the system. You may either:

- . Edit the record just added
- . Add Another Record
- . Exit

If you would like to add another record, click on the 'Add Another' button.

The wizard only prompts for a few of the many attributes of a bibliographic record. If you would like to enter additional attributes for the series just added, click on the 'Edit Series' button.

If you have no more entitles to add, click on the 'Exit' button.

Edit Record Add Another Finish

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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.

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File Special Additional Info Options Help

ChgLog Enter End Cancel Back New Edit View Delete Ack Del Go To Chg Key Set Attr Menu Next Rec Redisplay New Sess End Sess Catalog Print Print Save

Bibliographic Records: Identity Elements

Identity Content Access & Use Acquisition & Appraisal Related Materials Notes

Identification

Level: *series
Level ID: 19640 Repository: *1 IN. State Archives Top Level? Yes
Local ID: 2015-24 Status Active
Class Code:

Title

Title: *MANUSCRIPT COLLECTIONS
Concise Title: *MANUSCRIPT COLLECTIONS

Primary Creator

Creator ID: *213 Supreme Court Administration
View

Period

Date Expression: Undated
Date Range: CCYY-MM-DD thru CCYY-MM-DD open Bulk Dt Range: CCYY thru CCYY

Extent

Estimated Extent:
Actual Extent:

View Parent View Children Change Parent Related Entities
Add a Sibling Add a Child Extent Info Related Functions

Test Record? ☐

OK Cancel

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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.

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File Process Options Help

Save Cancel New Amend View Discontinue Menu New Sess End Sess List Schedule

General Schedules ? ✓ ✕

Select a Record Search:

No	Amd No	Schedule Title	Revision Type	Schedule Status
5	0	County Assessors General Schedules	Initial	Finalized
6	0	County Auditor General Schedules	Initial	Finalized
6	1	County Auditor General Schedules	Amendment	Finalized
6	2	County Auditor General Schedules	Amendment	Finalized
7	0	County Clerk General Schedules	Initial	Finalized
8	0	County Coroner General Schedules	Initial	Finalized
9	0	County Zoning, Planning, Development and Enforcement General Sche	Initial	Finalized
10	0	County Library General Schedules	Initial	Finalized
4	0	County General Schedules	Initial	Finalized
11	0	County Private/Public Agreement Operators General Schedules	Initial	Finalized
12	0	County Prosecutor Retention Schedule (PR)	Initial	Finalized
13	0	County Recorder General Schedules	Initial	Finalized
14	0	County Special District General Schedules	Initial	Finalized
15	0	County Treasurer General Schedules	Initial	Finalized
16	0	County Township Trustee General Schedules	Initial	Finalized
2	0	Judicial General Schedules	Initial	Finalized
17	0	Town/City General Schedules	Initial	Finalized
3	0	School General Schedules	Initial	Finalized
3	1	School General Schedules	Discontinued	Finalized
4	0	Educational Institutions (Public Schools) General Schedule	Initial	Draft

Maximum Records 1000

Edit Filter Apply Filter

Add New Schedule Delete Amend Discontinue View Cancel

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3. Click on Schedule Items.

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File Process Options Help

OK Cancel New Edit View Delete Ack Del Menu New Sess End Sess Schedule

General Schedule ? ✓ ✕

Agency No (Optional) 284 State Archives Division Amendment No 2

Schedule Category SG State Government Schedules

Schedule No 1

Disposition Authority GRS-SG (284) -1

Schedule Title General Schedules For Archives and Records Administration, Indiana. Sta

Effective From 04/27/2016 Effective Thru MM/DD/CCYY

Change Control

Revision Type Amendment Schedule Status Finalized

Revision Reason Amendment

Draft By AR Draft Begun 06/20/2016 Draft Done 06/20/2016

Submitted By AR Submitted To OVERSIGHT COMMITTEE Submitted 06/20/2016

Decision Date 06/20/2016 Finalized 06/20/2016 Active? ☒

General Schedule Description:

Schedule Notes Revision Notes **Schedule Items** Attachments OK

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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.

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OK Cancel New Edit View Delete Ack Del Menu New Sess End Sess

General Schedule Item Information

General Schedule Information

Agency No: 284 State Archives Division Schedule Revision: Amendment
 Schedule Category: SG State Government Schedules Sched Status: Finalized
 Schedule No: 1 General Schedules For Archives and Records Administration, Indiana. State Arc...
 Schedule Amend No: 2 Schedule Effective From: 04/27/2016 Thru MM/DD/CCYY

Item Information

Item Revision: Unchanged Item Item Status: Finalized Item Status
 Item Amend No:
 Item Type: Item Group Item 2 Sub 1 Sub 2 Sub 3
 Item Disp Authority: 2015-24 Item ID: 2015-24
 Item Heading: MANUSCRIPT COLLECTIONS
 Item Title: MANUSCRIPT COLLECTIONS
 Item Description: Original manuscripts provided to the State Archives and falling within relevant collection matter.
 Item Citation:

All Item Notes Appraisal Access Points Retention & Disposition
 Variant Titles Classification Indexing Terms Assigned Records
 Attachments Arrangement Categories

OK

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

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Enter Cancel New Edit View Delete Ack Del Menu New Sess End Sess

Schedule Item - Assigned Bibliographic Records

Level	Level ID	Status	Concise Title	Primary Creator Official Name
series	789	Inactive	MANUSCRIPT COLLECTIONS	Archives and Records Administration,
series	13695	Inactive	MANUSCRIPT COLLECTIONS	Historical Bureau, Indiana
series	14566	Inactive	MANUSCRIPT COLLECTIONS	Marion County. Wishard Hospital Nurs
series	16455	Inactive	MANUSCRIPT COLLECTIONS	War Memorials Commission, Indiana
series	18268	Inactive	MANUSCRIPT COLLECTIONS	General Assembly. House of Represent
series	18740	Inactive	MANUSCRIPT COLLECTIONS	Archives and Records Administration,

Assign Record Unassign Record View Cancel

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