Adlib – Guidelines for entering Level in the Identity Statement tab and linking records in a hierarchy

Approved by Collection Management Procedures Committee 25 March 2019

INTRODUCTION

These guidelines provide rules and examples on how to select and enter the record level in the Level field and how to link records in a hierarchy.

This procedure is to be applied to the cataloguing of new collections and retrospective collections prepared for digitisation.

The Level field uses a controlled vocabulary to describe record level and is linked to the *Thesaurus* database (term type: level). The vocabulary used by the Library is based on the five ISAD(G) levels of description and an additional level (sub-series) available in the Adlib *Archives (catalogue)* dataset[1]:

- fonds
- sub-fonds
- series
- sub-series
- file
- item

The field allows users to identify the record level and see the relationship between the components of a hierarchical record structure. Users can limit search results by record level through the 'Archival Hierarchy' facet in Primo or 'Level of Description' drop-down box in the Advanced Search of the Adlib User Interface.

GENERAL INFORMATION

Field label	Tag	Field name	Type	Public Display label	Primo facet
Level	gv	description_level	Select one value	Level of Description	Archival Hierarchy

RULES

General Rules

1. Mandatory – this field is mandatory at all record levels.

2. Non-repeatable – select one value only.

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[1] Proposed for use in a briefing paper developed by Megan Atkins, Meredith Lawn and Ann Peck and approved by stakeholders on 24/5/2017.

Local Rule

1. A single-level record is always catalogued at Fonds level. For many collections, a single-level record will be appropriate. The decision to create a hierarchical arrangement will be based on many factors including significance, presence of multiple formats and digitisation requirements.

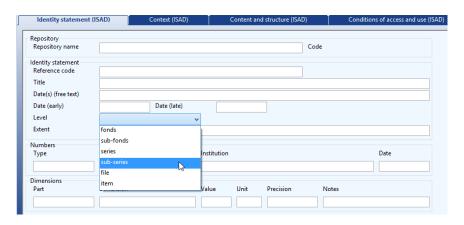## HOW TO SELECT AND ENTER RECORD LEVEL IN THE LEVEL FIELD

Choose the appropriate level according to the following table based on ISAD(G) definitions.

LEVEL DEFINITIONS AND USE

Fonds	The whole of the records, regardless of form or medium, organically created and/or accumulated and used by a particular person, family, or corporate body in the course of that creator's activities and functions. **Use** In using this definition, the Library follows RAD2 (Rules for archival description 2nd edition), which notes that "For the purposes of these rules, that part of a fonds that is actually present in the repository is what is described at the fonds level of description". A fonds may be a single item (letter, diary, painting, film) or it may be made up of many items. A single-level record is always catalogued at Fonds level.
Sub-fonds	A subdivision of a fonds containing a body of related records corresponding to administrative subdivisions in the originating agency or organisation or, when that is not possible, to geographical, chronological, functional, or similar groupings of the material itself. **Use** This level may be used for the cataloguing of archives of large or complex organisations (if necessary); for aggregating accessions from the same provenance (e.g. Gillian Mears, Elizabeth Jolley, Ross Edwards) or regular consignments of records from institutions (e.g. Musica Viva); for artificial aggregations based on subject (e.g. First Fleet Collection) or collecting projects (e.g. Italians in New South Wales project; German Collecting project; Rainbow Archives; World War 1914-1918 Collection).
Series	Documents arranged in accordance with a filing system or maintained as a unit because they result from the same accumulation or filing process, or the same activity; have a particular form; or because of some other relationship arising out of their creation, receipt, or use.

Sub-series	Sub-series is an extra level available which sits between Series and File levels. **Use** This level may be used for large or complex collections where an additional level is required between series and file level; or where there are separate identifiable sequences within a series, for example a series of index cards with sets arranged both chronologically and alphabetically; or a series of family correspondence with individual family members' correspondence as sub-series; or to manage multi-format collection material within a series requiring different call numbers and locations.
File	An organised unit of documents grouped together either for current use by the creator or in the process of archival arrangement, because they relate to the same subject, activity, or transaction. **Use** Examples include a file relating to a particular correspondent within a series of correspondence; a photograph album within a series of photograph albums; or an individual subject file. Note that a file may consist of any number of individual folders. Folders are merely physical document storage units while files are groupings used to impose intellectual order on records.
Item	The smallest intellectually indivisible archival unit, e.g., a letter, memorandum, report, photograph, sound recording.

In the Identity Statement tab, enter the appropriate level from the drop-down menu in the Level field.

HOW TO LINK RECORDS IN A HIERARCHY

Records are linked via two level fields in the Context tab:

Linking to the parent record while editing the child record:

If you are editing a child record and wish to link it to its parent (the record which will sit immediately above it in the hierarchy), open the Context tab and enter the Reference code of the parent record in the **Part of** field under *Parent level unit of description*. If the Reference code is not known, put the cursor in the **Part of** field and press Shift+F4 to look up the record via a search form. Select the desired record from the results list and it will populate the **Part of** field.

A record can only be linked to one parent record.

Example of linking to the parent record using the *Part of* field.

After saving, Adlib **automatically** updates the parent record with the link to the child record.

Please note: Multiple child records can be linked to a parent record globally using the Replace in Record feature (refer to Adlib Archive Task Manual, p. 87).

Linking the child record(s) while editing the parent record:

If you are editing the parent record and wish to link a child record (the record which will sit immediately below it in the hierarchy), open the Context tab and enter the Reference code of the child record in the **Parts** field under *Child level units of description*. If the Reference code is not known, put the cursor in the **Parts** field and press Shift+F4 to look up the record via a search form. Select the desired record from the results list and it will populate the **Parts** field.

More child records can be added by putting the cursor in the Parts field and using "Append occurrence beneath" in the Edit menu.

825426		fonds

Selfe family papers and pictorial material, 1853-1948

Context
Creator   Selfe family

Admin. history/Biograp

Archival history

Ownership history
Ownership history

Accession
Accession number   ACMS-825426

Immediate source of acquisition

Presented by Lady Deer, 1981
Pic.Acc.4944

Parent level unit of description
Part of

Notes

Child level units of description
Parts   825431   series

Series 01: Norman Selfe papers, ca. 1880-1910

Notes

Parts   825433   series

Series 02: Norma Selfe and Rhoda Selfe papers, ca. 1908-1948

Notes

Example of linking the child records using the *Parts* field

After saving, Adlib will **automatically** update the child record(s) with the link to the parent record.

USING THE HIERARCHY BROWSER

Opening the Hierarchy Browser

In the View menu, click on the Hierarchy browser button to show the full hierarchical structure of the archival unit.

Moving records using the Hierarchy Browser

It is possible to move records to different positions within the hierarchy using the Hierarchy browser, such as moving a File level record which fits better in another Series. Click on the record to be moved, hold the mouse button pressed down, drag the unit to the desired parent unit of description underneath which it must be placed, and release the mouse button. A dialog box will ask for confirmation before the change is actually processed. The internally linked fields *Part of* and *Parts* in all relevant records are then automatically adjusted. However, if the moved record has changed to a *different level* of description, the new level of that record must be adjusted manually, by explicitly editing it inside the record.

STRUCTURE OF THE HIERARCHY
Adlib makes no demands on the structure of the hierarchy. The main principle is that in moving from top to bottom down any path, the levels proceed from general to specific.

PLEASE NOTE:
For guidelines on how to **devise titles** for each level in a hierarchy, please consult the Adlib Title procedure.

Meredith Lawn
Specialist Librarian, Archival Team, CA&D

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