Archivists' Toolkit to AtoM Migration Checklist

Finding Aid: _____

Checked By: _____

GENRE/FORM STATEMENTS	
Genre/Form statement removed from titles proper (fonds, series, and sub-series)	
Genre/Form statements added as Subject Heading	
"BASIC DESCRIPTION" DATA ELEMENTS	
Date Expression is filled out at the fonds and series levels	
Date Begin and Date End is filled out at all levels of description	
A value is selected in the "Language of Materials" drop-down list (at the fonds-level)	
Check "Fonds or Collection Number" field; add number if necessary	
Check fonds-level physical description	
Check the series-level physical descriptions	
Check the Container Summary area for physical description info and move to "Notes Etc. & Deaccessions" tab	
★NAME HEADINGS★	
At the highest level of description, check to ensure donor(s) and creator(s) are listed; remove "originator" from creator names	
Ensure that the creator is not duplicated as a subject.	
Check fonds-level Admin History/Bio Sketch and Scope and Content notes to see if other names should be listed as subjects	
★SUBJECT HEADINGS★	
Add geographic subject heading(s) (at the highest level of description)	
Add subject headings that describe the nature of the materials in the fonds (at the highest level of description)	
Add subject headings that describe the subject or thematic area of the fonds (at the highest level of description)	
If names or corporate bodies are listed in this area, move them to Name Headings.	
Ensure that the subject that links all fonds of the same category is present.	
SPELLING AND PUNCTUATION	
Check fonds-level description and series-level descriptions	
NOTES ETC. & DEACCESSIONS TAB (FONDS-LEVEL)	
Check completeness of Admin History/Bio Sketch	
Check completeness of Custodial History note	
Check completeness of Scope and Content note	
Add "Abstract" note if missing	
Add "Accruals" note if missing	
Add "Language of Materials" note if missing	
Add "Preferred Citation" if missing	
Add "Restrictions on Access" note if missing	
Add "Terms Governing Use and Reproduction" note if missing; change default text if necessary	
Check for potential "Related Groups of Records" notes (different provenance at Dal or other archives). Be sure to cross-reference.	
Check for other optional notes	
FINDING AID DATA	
Add MS # to EAD FA Unique Identifier field	
Check the Finding Aid Title field	
Check the Finding Aid Filing Title field	
Check the Finding Aid Date field	
Check the Author field	
Make sure "RAD" is selected in the "Description Rules" drop-down menu	
Make sure "English" is included in the "Language of Finding Aid" field	
★CONTAINER AND PHYSICAL LOCATION INFORMATION★	
Make sure the Box-Folder information is properly formatted	
Open the "Manage Locations" menu and make sure correct Physical Locations are assigned to **ALL** containers	
FINDING AID STATUS	
Select "Completed" under the Finding Aid status drop-down menu	

NOTES: