

# Archival Processing Checklist

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Use this checklist to help manage arrangement and description projects ([also available as a pdf](#)).

- ☐ Revising an existing fonds description: download the pdf finding aid and upload to AIS Fonds record (if not already uploaded).
- ☐ Create an AIS Agent authority record for creator (if required).
- ☐ Create an AIS Fonds record (if required).
- ☐ Create a new AIS Processing Project record.
- ☐ University records: download and complete the [Administrative History Data template \(Word\)](#).
- ☐ Register removal of processed URC boxes in the AIS (link boxes to the Processing Project ).
- ☐ Download and complete a [file / item list template](#); if customizing, download and complete [AtoM field mapping template](#).
- ☐ From the AIS Processing Project create new Container , Object , and AIP records as needed for rehoused / processed materials.
- ☐ Manually create the Fonds record in SFU AtoM (if required).
- ☐ Transform the Excel file / item list to AtoM csv via the [Online AtoM Import app](#).
- ☐ Import AtoM csv file to AtoM: **first series, then files, then items**.
- ☐ Assign Containers to Locations in AIS.
- ☐ Print and apply file labels (Excel2AtoM app or download AtoM file list report and import to AIS)
- ☐ Use the online [Extent Calculator](#) to get fonds and series extents ([instructions for use here](#)).
- ☐ Complete full series descriptions in SFU AtoM (see [description templates for boilerplate text](#)).
- ☐ If you have [finding aid appendices](#), describe them in the AtoM Finding aids note field.
- ☐ In AtoM, update Publication status (= "published") of the new descriptions; check Update descendants in the fonds record to set for the entire fonds.
- ☐ Generate the pdf finding aid in AtoM; if including appendices, merge with pdf, delete AtoM pdf and upload pdf with appendices.
- ☐ In AIS, mark the Processing Project record completed.
- ☐ Remove the printed Accession forms from the Unprocessed Holdings binder in the reading room.
- ☐ In the AIS, complete and print the Processing Report for the collection file and updated container and backlog location lists.

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