

Archival Processing Checklist

Last updated October 31, 2024 (v3.2)

Use this checklist to help manage arrangement and description projects.

- ☐ Revising an existing fonds description: download the existing pdf finding aid and save to the electronic collection file (if not already stored).
- ☐ 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 the **AtoM Import Template** to generate file and item lists.
- ☐ 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).
- ☐ Import AtoM csv file to AtoM: first series, then files, then items.
- ☐ Assign **Containers** to **Locations** in AIS.
- ☐ Print and apply file labels.
- ☐ Use the online Extent Calculator to get fonds and series extents.
- ☐ 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.
- ☐ In the AIS, print updated container and backlog location lists for the collection file.