



Archival Processing Checklist

Last updated November 12, 2024 (v3.3)

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 (if using), then files, then items.
- ☐ Assign **Containers** to **Locations** in AIS.
- ☐ Export file / items lists from AtoM, import to AIS to [print file labels](#).
- ☐ Use the [online Extent Calculator](#) to get fonds and series extents.
- ☐ Complete full series descriptions in SFU AtoM (see [AtoM Data Entry Guidelines](#) for help).
- ☐ 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 (if these exist).
- ☐ In the AIS, complete and print the **Processing Report** for the collection file.
- ☐ In the AIS Fonds record, register non-textual media on the **Holdings > Non-textual** tab.
- ☐ In the AIS, print updated container and backlog location lists for the collection file.

DOCUMENT CONTROL

Version history			
<u>Version</u>	<u>Date</u>	<u>Finalized by</u>	<u>Version notes</u>
v3.3	Nov 12, 2024	Richard Dancy	Minor revision, added links where possible.
v3.2	Oct 31, 2024	Richard Dancy	Updated; retire GitHub page, maintain as Word doc
v.3.1	Jan 23, 2023	Richard Dancy	Updated, maintain on GitHub
v3.0	Sep 24, 2010		