Chapter 12

Adding subjects and names to accession and description records

The primary purpose of subject and name records is to amplify source, creator, and content information found in accession and description records. Within these records, the Archivists' Toolkit provides features for adding subject terms, source names, creator names, and subject names.

Where a needed subject term or name does not yet exist in the Toolkit, you can create it immediately from within the accession or description record while in the process of assigning a source, creator, subject name, or other subject term.

This chapter describes procedures for adding terms to accession and description records, and for creating new subject terms and names within this context. See Chapter 11 for instructions on creating new terms directly within the subject and name functional areas.

Adding subjects

Overview

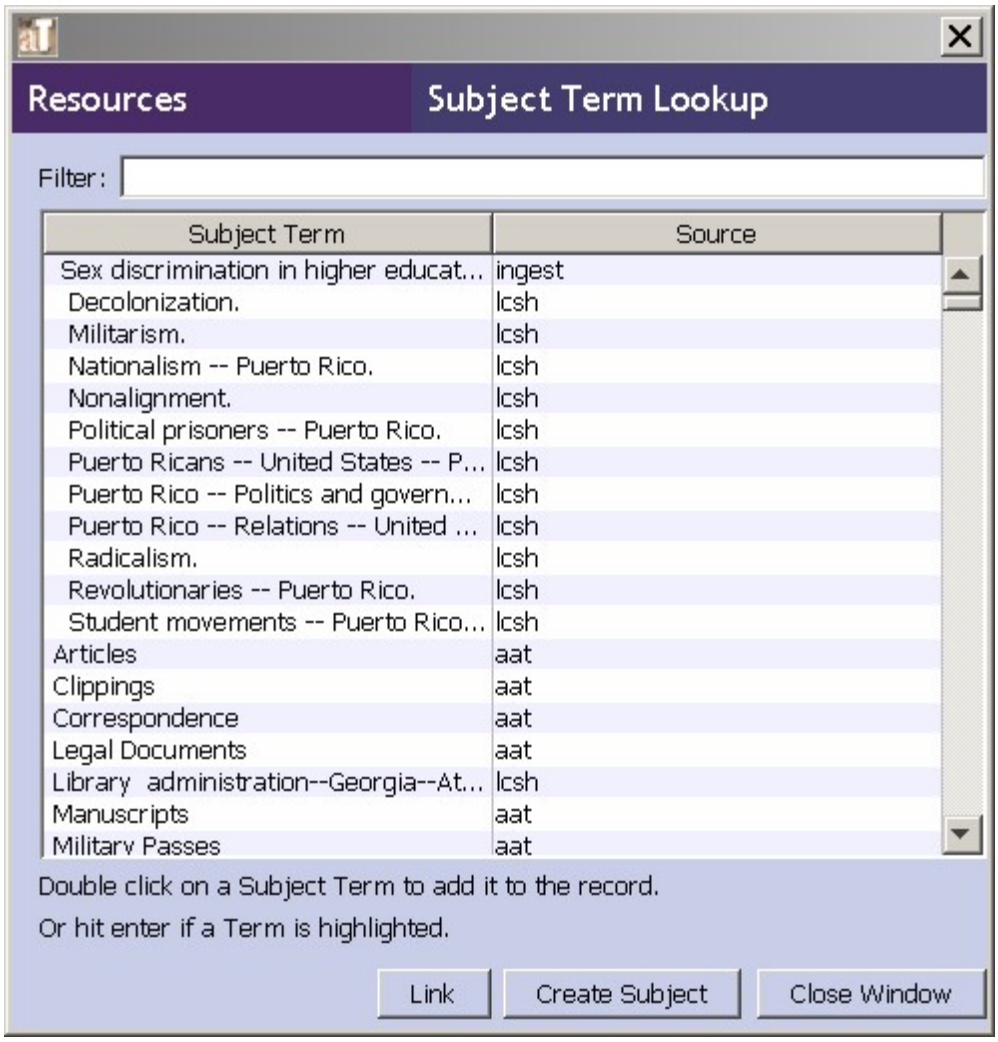
The accession and description templates include command buttons for assigning subject terms to these records, and for removing a subject term that was previously assigned to the record. Once a subject term is assigned, it will appear in the accession or description record and in any accession or description reports that make use of subject terms. For example, the subject term will be included in MARC and EAD outputs for that description record.

Assigning subjects

Use the following instructions for assigning subjects from either an accession or description record. Remember, subjects can be added at any level of description.

1. From the **Names & Subjects** tab of an accession record or the **Subjects** tab of a description record, select the option to **Link Subjects**.

   The Toolkit will display a list of subject terms available.



2. To retrieve the desired term, scroll through the list, or use the **Filter** box to type in a word that is part of your desired term. As you type, the list will be filtered to include only those terms containing the character string entered into the **Filter** box.

3. If the desired term does not appear, and if you have the proper permissions, you may create a new term. Press the **Create Subject** button, which will cause the Toolkit to open a blank subject record.

4. Follow the instructions in Chapter 11 to create the new record. When you have saved the record, the Toolkit will return to the **Subject Term Lookup** window, where the new term has been added to the list.

5. Once you have located or created the desired term, double click on the term.

6. The term you selected will now appear in the list of subject terms related to the accession or description record.

7. Repeat the process of selecting terms as often as necessary, then press the **Close Window** button to return to the accession or description record.

Removing subjects

Once a subject has been successfully assigned to an accession or description record, it can easily be removed if you decide that it does not appropriately represent the materials in question.

1. Retrieve and open the accession or description record that contains the incorrect subject term.
2. Select the term(s) to be removed in the subject terms list of the record.
3. Press **Remove Subjects**.
4. The term will no longer be included in the subject terms list.

Note: Removing a subject term from an accession or description record removes the relationship between the two records, but does not delete the subject record itself.

Adding names

Overview

The accession and description records include command buttons for assigning name terms to these records, and for removing a name term that was previously assigned to the record. Once a name term is assigned, it will appear in the accession or description record and in any accession or description reports that make use of name terms. For example, the name term will be included in an accession record output.

Types of name relationships

There are three options for assigning a name to an accession or description record. You may add a name as a source for the materials, a name as a creator of the materials, or a name as a subject documented in the materials. In addition to these functional categories, you may also further refine information about the entity's relationship to the materials. You may do this by recording a role for a source, creator, or subject, and by adding a form subdivision to a subject. Neither of these fields is required.

The function, role, and form fields do not become part of the name record, only a part of the name as applied to the specific accession or description record.

1. **Function.** The function of the name, either source, creator, or subject, in relation to this accession, description resource, or description component record. The same name can be linked multiple times to an accession, description, or component record, as long as the function is different. For example, you could

link the name Smith, Jane to an accession record as the source, the creator, and the subject of the materials.

Note that names as sources may only be assigned to accession and description resource records, not description component records. Sources for descriptive components may be recorded in the **Immediate Source of Acquisition** note.

2. **Name role**. An indication of what role the name has in regard to its function as creator, source, or subject. Examples include identifying a source as a donor or a dealer, or identifying a creator as collector, a director, or an illustrator.

   The content of this field is populated with a controlled list that is drawn from the list of MARC relator codes. You may not add other values to the field. The roles available for creator and subject are different than the roles available for source.

2. **Form**. Topical, geographical, chronological, or form descriptors, singly or in some combination, that modify a name assigned as a subject. The Toolkit does not enforce consistency in the use of separation devices where combinations of descriptors are used..

   Examples:

   `Correspondence` (for Salk, Jonas--Correspondence.)

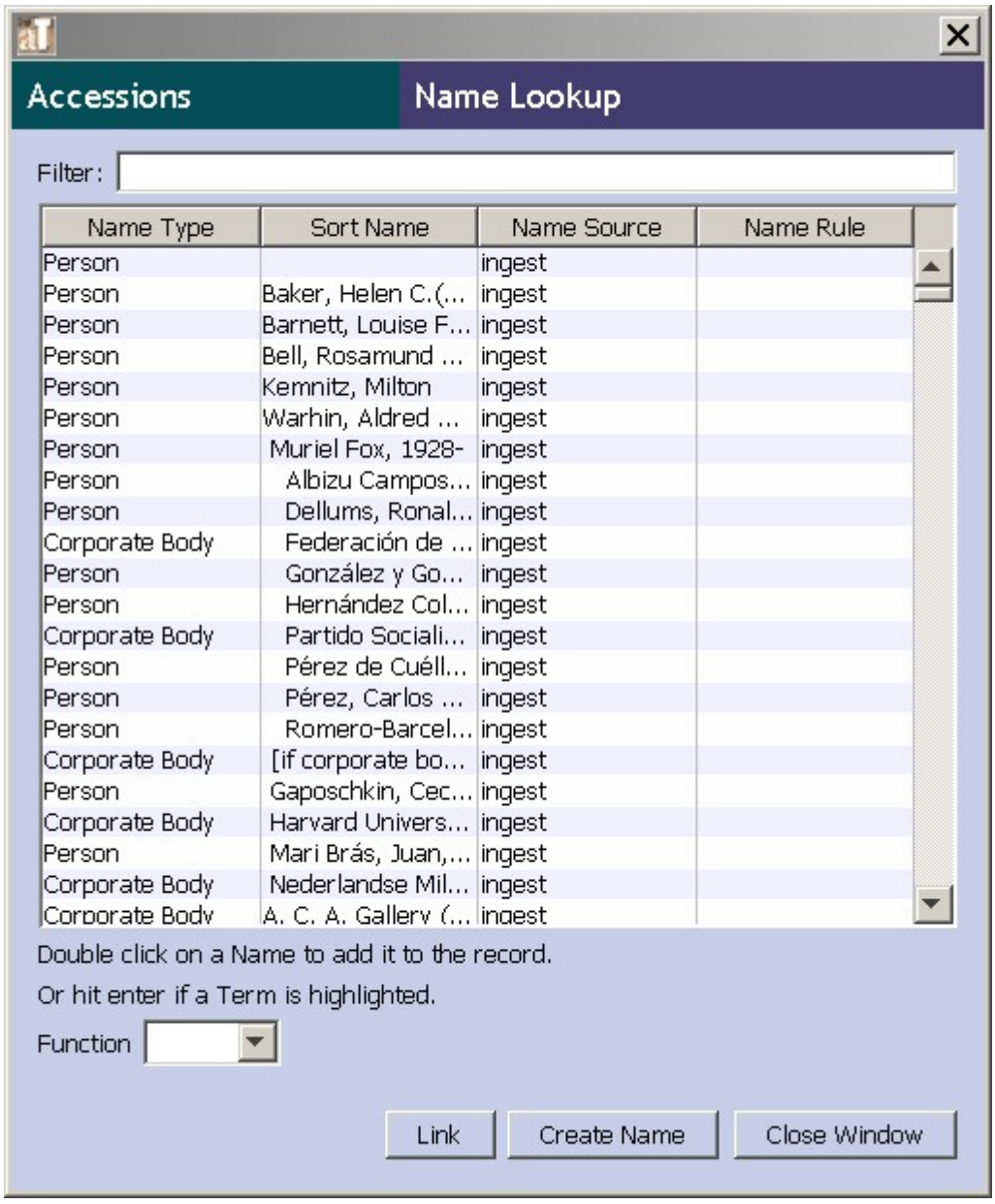
   `Finance, Personal` (for Hudson, Erasmus Darwin, 1806-1880 -- Finance, Personal.)

   `Criticism and interpretation--History--18th century` (for Shakespeare, William,--1564-1616--Criticism and interpretation--History--18th century.)

Assigning names

1. From the **Names & Subjects** tab of an accession record or the **Names** tab of a description record, select the option to **Add Name Link**.

   The Toolkit will display a list of names available.



2. To retrieve the desired name, scroll through the list or begin to type the desired name in the **Filter** box. As you type, the list will be filtered to include only those terms containing the character string entered into the **Filter** box.

    a. If the desired name does not appear, and if you have the proper permissions, you may create a new name record. Press the **Create Name** button, which will cause the Toolkit to prompt you for the type of name record, then open a blank name record.

    b. Follow the instructions in Chapter 11 to create the new record. When you have saved the record, the Toolkit will return to the **Name Authority Lookup** window, where the new name has been added to the list.

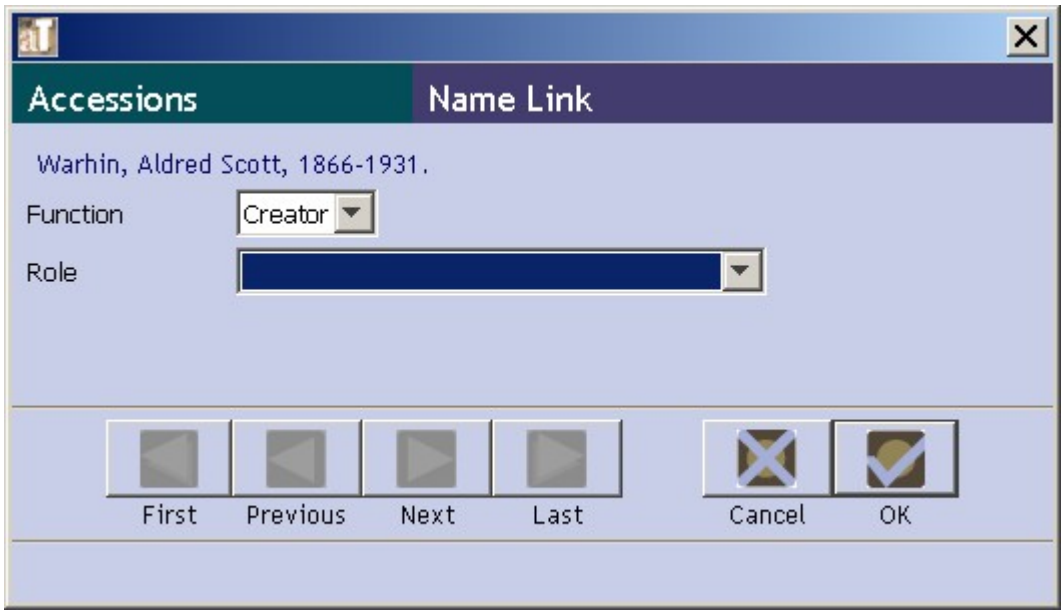
3. Select a **Function** for the name: Source, Creator, or Subject. *This step is required.*
4. If you wish, select a more specific role for the creator from the **Name role** field.
5. For subjects, you may also choose to add a **Form Subdivision**.
6. Once you have selected a function, and identified the role and subdivision (if so desired), select the name and press **Link**, or double click the name in the list. The name will be added to the open accession or description record.
7. Repeat the process of selecting names as often as necessary, then press the **Close Window** button to return to the accession or description record.

Editing name links

You can edit aspects of a name link, such as function, role, or subdivision, even after the name has been added to an accession or description record.

1. Retrieve and open the accession or description record that contains the name.
2. From the **Names & Subjects** tab of an accession or description record, select the name whose link is to be modified.
3. Press **Edit Name Link**.

   The Toolkit will open a window showing the current settings for function, role, and if applicable, subdivision. Make the desired changes to these elements.



4. Press **OK** to save the new linking information.

Removing names

Once a creator, source, or subject name has been successfully assigned to an accession or description record, it can easily be removed.

1. Retrieve and open the accession or description record that contains the incorrect name.
2. From the **Names & Subjects** tab of an accession record or the **Names** tab of a description record, select the name to be removed.
3. Press **Remove Name Link**.
4. The name will no longer be included in the name list.

Note: Removing a creator, source, or subject name from an accession or description record removes that specific relationship between the two records, but does not remove other types of name relationships with the record. For example, if an accession shares a source and a creator, removing the creator from the record does not remove the same name from the source list. Removing a creator, source, or subject name does not delete the name record itself.