

<b>Introduction</b>	<b>3</b>
1.1. Using the Archives Hub template	3
1.2. Using your own spreadsheet template	3
1.3. Using The National Archive's 'MYC' template	4
1.4. Bespoke transformation by Archives Hub	5
<b>General cataloguing tips</b>	<b>6</b>
2.1. Basics	6
2.2. The templates	6
2.3. Mandatory fields	7
2.3. Hierarchy	8
2.4. Adding multiple values	9
2.5. Formatting markup	9
<b>Uploading to the Editor</b>	<b>10</b>
3.1. Basic steps	10
3.2. Matching column names	11
3.3. Errors and issues	12
<b>Resolving errors in the Editor after upload</b>	<b>13</b>
<b>Appendix A: Columns in the Archives Hub template</b>	<b>15</b>
Reference	15
Former Reference	16
Alternative Reference	16
Level of Description	16
Title	17
Display Dates	17
Start and End Dates	17
Languages	18
Extent	18
Scope and Content	19
Conditions Governing Access	19
Name of Creator	20
Administrative/Biographical History	20
Subjects	21
Index Terms - Persons, Organisations, Family Names and Places	21

Archivist's Note	21
Digital Material Link	22
Digital Material Description	22
Arrangement	22
Finding Aids	23
Related Material	23
Separated Material	23
Dimensions	24
Genres/Forms	24
Appearance	24
Accruals	24
Appraisal	24
Conditions Governing Reproduction	25
Custodial History	25
Immediate Source of Acquisition	25
Location of Copies	25
Location of Originals	26
Note	26
Publications	26
<b>Appendix B: More information about hierarchy</b>	<b>27</b>
Creation of the hierarchy	27
Some more examples	29
<b>Appendix C: Multi-value cells quick reference</b>	<b>31</b>
<b>Appendix D: TNA's column names and Archives Hub equivalents</b>	<b>32</b>

## 1. Introduction

It is now possible for contributors to publish their spreadsheet records on Archives Hub. In most cases this is done by uploading your spreadsheet(s) to your account in the EAD Editor ([archiveshub.jisc.ac.uk/eadeditor/](https://archiveshub.jisc.ac.uk/eadeditor/)), our interface for creating, editing and previewing archive descriptions. In the Editor you can check and edit your descriptions after upload, preview their appearance, and send them to the main Archives Hub system for publication.

There are several options for creating and publishing your records -

### 1.1. Using the Archives Hub template

- Archives Hub provides a template for cataloguing. You can download the template here: [archiveshub.jisc.ac.uk/spreadsheetrecords/](https://archiveshub.jisc.ac.uk/spreadsheetrecords/) or from the 'Upload Description' page in the Editor.
- The template follows a simple 1 row per record / 1 column per field format, and includes a comprehensive range of cataloguing fields. It offers structure when adding dates, creator names and subjects/index terms.
- The template also includes advice on how to use each column/field - just hover over the name of any column with your mouse to see the instructions.
- Note: **if you change any of the column names you will need to match them to the Hub column names** using the [matching option](#) described below.
- For more information on the fields included in the template, and detailed cataloguing advice, refer to [Appendix A: Columns in the Archives Hub template](#) below.
- Once you have entered your description into the template, the next step is to [upload it to our EAD Editor](#), from where you can check it, add to it and publish it.



	A	B	C	D	E	F	G	H	I	J
1	Reference	Former Alternative	Level of Description Title	Display Dates	Start Date	End Date	Languages	Extent		
2										
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										
16										
17										
18										
19										
20										

*The template is a simple spreadsheet with column headings, some controlled fields, and help text, to enable you to create a well-structured description for the Archives Hub.*

### 1.2. Using your own spreadsheet template

- If your own spreadsheet records follow the 1 row per record / 1 column per field format, you have included our mandatory fields, and you use our

[recognised level values](#), then you can upload your spreadsheets to the Editor.

- If your column names differ from those in the Archives Hub template, you will need to match your column names to the Hub column names using the matching option on the 'Upload Description' page in the Editor before uploading (see [3.2. Matching Column Names](#)).
- Your column name matches will be saved in your Editor account so that you can re-use them for other spreadsheets and future uploads.
- **Note:** we have included a wide range of commonly used cataloguing fields in our upload facility, but you may very occasionally have used fields which are not included. If it is important to include such a field in your descriptions, contact us at [contributors.hub@jisc.ac.uk](mailto:contributors.hub@jisc.ac.uk) and we will identify a solution.

### 1.3. Using The National Archive's 'MYC' template

If you use TNA's Manage Your Collections template, you can also upload your spreadsheets to Archives Hub.

- As long as your spreadsheet records follow TNA's Manage Your Collections template, you can upload the same spreadsheets to Archives Hub through the Editor.
- If you have changed any of the column names you will need to match them to the Hub column names using our matching option.
- TNA's column names are not in our drop-down list of names, so you will need to use our equivalent. e.g. if you have a column for a display date, our column name is 'Display Dates' (not 'Covering Dates'). See [Appendix D](#).
- Note: the general cataloguing tips provided below will apply to spreadsheets in the TNA format, but the detailed column/field descriptions provided for the Hub template may differ slightly. If you are unsure contact us at [contributors.hub@jisc.ac.uk](mailto:contributors.hub@jisc.ac.uk).
- It is also worth noting that the Archives Hub template has some fields and structuring options which the TNA MYC template does not:
  - Creator names are entered by type - person, organisation or family (if the type is not defined, the creator cannot be included in personal or corporate name searches).
  - Genre or form can be added e.g. photographs, maps, manuscripts etc.
  - Digital image URLs and descriptions can be included
  - Persons, organisations and families can be added as index terms
  - Additional ISAD(G) fields are included, such as 'Location of originals' and 'Immediate source of acquisition'.

#### 1.4. Bespoke transformation by Archives Hub

- If you have spreadsheet records which don't fit any of the formats above, the Hub team can look at undertaking a custom transformation of the records, so that they can be uploaded to the Editor, or direct to Archives Hub.
- If you have records in this category, or are unsure, email us at [contributors.hub@jisc.ac.uk](mailto:contributors.hub@jisc.ac.uk) and we will discuss next steps with you.

## 2. General cataloguing tips

### 2.1. Basics

- You can use any spreadsheet software to create and edit your records. Currently however your spreadsheet must be saved in Microsoft Excel as a **.xlsx** (Excel Workbook) file in order to be uploaded to the Editor successfully. If you try to upload a spreadsheet which has been saved in Google Docs, LibreOffice/OpenOffice, Mac Numbers or similar, you are likely to encounter an error during upload.

We hope to develop our system to handle spreadsheets from other software in the future. In the meantime, if you do not have access to Excel, but have spreadsheets you wish to upload, contact us at [contributors.hub@jisc.ac.uk](mailto:contributors.hub@jisc.ac.uk) and we will upload your spreadsheets for you.

- You can upload either collection-level only or multi-level descriptions. However:
  - Only one spreadsheet can be uploaded at a time. If you have entered your descriptions into multiple sheets in a single workbook, you will need to save them as separate sheets before uploading them.
  - If you upload a workbook with multiple sheets, the upload is likely to succeed, but only the **first** sheet in the workbook will be processed.
  - Only one description can be uploaded at a time (whether collection-level or multi-level). If you have added multiple collections to a single sheet, you will need to split them into separate sheets before uploading (and note, every sheet must include the row of column names as the first row).

### 2.2. The templates

- If you are using either the Archives Hub or TNA template, you can hide (or delete) any columns that are not required if you do not intend to use them, in order to make data entry easier. To do this you need to 'unprotect' the template (Tools > Protection > Unprotect sheet). Note though: **you should not delete the Name of Creator columns** from either template, as this will cause your upload to fail.
- Note also: **you must not delete the first row with the column names.**
- In the Archives Hub template, the format of all columns apart from 'Start Date' and 'End Date' is 'Text'. The format of 'Start Date' and 'End Date' is 'General' [number]. You should not change the format of any of the columns or cells.

- You may decide not to input data in many of the columns/fields, and a number of them are typically only used at the collection level. However the Hub has some mandatory fields which are required before a description can be published.

### 2.3 Mandatory fields

- There are some fields that are mandatory in order to upload a spreadsheet to our EAD Editor (whatever template you are using). These are:
  - **'Reference'** (for all rows)
  - **'Level of Description'** (for all rows)
  - **'Start Date'** and **'End Date'** (at the top/collection level)
- There are also some other fields that are mandatory for a description to be published on Archives Hub. You can add these in the Editor after upload if they are not already entered into your spreadsheet.
- At the top level of a description (usually 'Fonds' or 'Collection' level) the full list of mandatory fields is:
  - **'Reference'**
  - **'Level of Description'**
  - **'Title'**
  - **'Display Dates'**
  - **'Start Date'** and **'End Date'**
  - **'Languages'**
  - **'Extent'**
  - **'Scope and Content'**
  - **'Conditions Governing Access'**
- At lower levels the list is:
  - **'Reference'**
  - **'Level of Description'**
  - **'Title'**
- In the Archives Hub template the fields which are mandatory at the top level in a description are in columns A-O, and the column names are coloured **red**. You can find out more about the Hub mandatory fields here: <https://archiveshub.jisc.ac.uk/mandatoryfields/>.
- Archives Hub *recommends* some other fields which are particularly useful to researchers, and enhance the quality of descriptions. In the Archives Hub template the fields which are recommended (but not mandatory) at the top level in a description are in columns P-Y and the column names are coloured **orange**.

- You can find out more about the Hub recommended fields here: <https://archiveshub.jisc.ac.uk/mandatoryfields/>.
- Remember: you can add or enhance fields in the Editor after upload. The Editor offers options such as formatting for free text fields, structuring of index terms, and adding globally unique identifiers for people and organisations.

### 2.3. Hierarchy

When you upload a spreadsheet containing a multi-level description, our system will try to construct the hierarchy of your description automatically. This is not always straightforward however: the system may flag potential issues, and we recommend that you check that the hierarchy of your description is correct in the Editor before publication.

We have two ways of identifying the hierarchy in multi-level descriptions:

- **References:** if you use a straightforward numbering system with forward slashes - '/' - to indicate level changes in your references, the references will be used to create the hierarchy. This will only work if the numbering is regular and slashes are used consistently, e.g.:

- REF, REF/1, REF/1/1, REF/1/2, REF/2, REF/2/1, etc

- **Level values:** if we cannot use your references, we will use your level values instead. Extracting hierarchy from level values means that we have to assume certain relationships. For example: a 'file' is a child of a 'series', and an 'item' is a child of 'file'. This can lead to errors if, for instance, an item follows a file, but is not meant to be contained within it.
- Note: we only accept a limited range of level values. These are:

collection | fonds | sub-fonds | sub-sub-fonds | sub-sub-sub-fonds | series | sub-series | sub-sub-series | sub-sub-sub-series | file | item | sub-item

(and if you use 'collection' for the top level then you cannot use a 'fonds' subdivision below it.)

- You may see warnings about gaps in your references as a result of our processing. You can choose whether to carry on uploading, or edit your spreadsheet first and then try again. If your references are correct, you can ignore the warning.
- If you find there is a problem in the Editor with the hierarchy of your description after upload, it may not be possible to fix this in the Editor, and you may need to edit your spreadsheet and try uploading again. If you are unsure why there is an error, or you cannot see how to fix it, contact us at [contributors.hub@jisc.ac.uk](mailto:contributors.hub@jisc.ac.uk) and we will help.

## 2.4 Adding multiple values

- If you need to add multiple values in a single cell in, for instance, the 'Languages' or 'Subjects' column, make sure you use a consistent separator to distinguish between them. The spreadsheet 'tooltips' help identifies which separators you can use. For a list of the separators that can be used in each column, see [Appendix C: Multi-value Cells Quick Reference](#).

## 2.5 Formatting markup

If you have markup in your description, it will be uploaded to the EAD Editor if it is valid EAD markup. For example, you cannot have `<bold>The Thames</bold>` as this is not valid XML. But if you have `<emph render="bold">The Thames</emph>` this is valid and will upload as part of the description. You can include the `<title>` tag, which is valid, as well as `<persname>`, `<corpname>` and `<famname>` tags if you wish to.

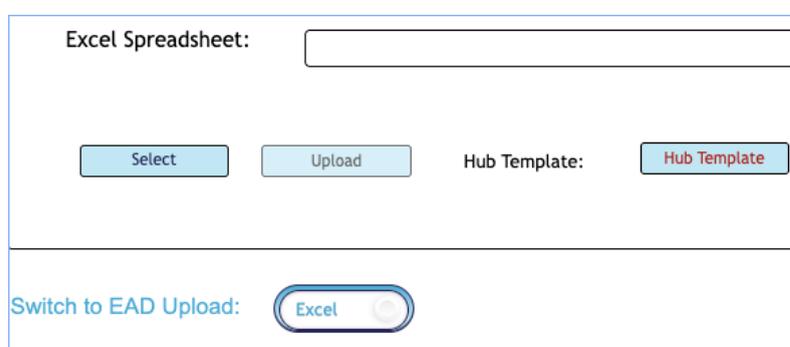
Any invalid markup will be flagged, and you will not be able to upload the description.

### 3. Uploading to the Editor

The EAD Editor is our free, online archival cataloguing tool (you can find details about the Editor here: <https://archiveshub.jisc.ac.uk/eadeditor/> and request an Editor account by emailing us at [contributors.hub@jisc.ac.uk](mailto:contributors.hub@jisc.ac.uk)). You will use the Editor to check and edit your uploaded descriptions before publishing them on Archives Hub. Once you have uploaded all of your spreadsheets, you can also switch to using the Editor as your main cataloguing tool if you wish to.

#### 3.1. Basic steps

- When your spreadsheet(s) are ready to upload, log in to your Editor account and select 'Upload Description' in the top menu bar.
- Click the switch button beneath the main upload area to switch from EAD to spreadsheet upload.



The screenshot displays the 'Excel Spreadsheet:' upload interface. At the top, there is a text input field for the spreadsheet name. Below it are three buttons: 'Select', 'Upload', and 'Hub Template'. The 'Hub Template' button is highlighted in red. At the bottom, there is a 'Switch to EAD Upload:' section with a toggle switch currently set to 'Excel'.

#### *EAD Editor spreadsheet upload*

- If you have used either the Archives Hub or the TNA MYC template, use the 'Select' button in the main upload area to choose the relevant file on your computer, and then click 'Upload'.
- If you have used your own template, or changed any of the column names in either of the templates, you will need to match these to the Hub column names by following the instructions in [3.2. Matching Column Names](#) below.
- If our processing does not detect any issues with the hierarchy of your description or the columns used in your spreadsheet, the file will upload and then the description will open in the Editor, ready for further editing and publication.
- If your file uploads but it has errors (such as missing mandatory fields or incorrect dates), these will be flagged in **red** in the hierarchy pane on the left of the Editor screen. You will need to correct these before publishing. See [4. Resolving errors in the Editor after upload](#) for more information.
- If you wish to make any further changes to your description, such as adding or structuring index terms, you can do so now. It is particularly useful to properly structure personal names, putting the date into the 'date' field and so on. For detailed guidance, see our [guide to the Editor](#).

- When you are happy with your description, you can publish it using the 'Make Live on Hub' button at the bottom of the description. It may take a few minutes for the description to appear on Archives Hub, and we would always recommend checking your description carefully on the Hub once it is live. If there is no 'Make Live' button, [contact us](#) and we will finish setting up your account.

### 3.2. Matching column names

- If you have used your own spreadsheet template, or changed any of the column names in the Archives Hub or TNA template, you will need to match your column names to the Hub column names before uploading your spreadsheet.
- Log in to your Editor account, select 'Upload Description' in the top menu bar, and then click the switch button beneath the main upload area to switch from EAD to spreadsheet upload.
- In the matching area below the switch button, select a Hub column name from the 'Match Column Names' dropdown, and then enter your equivalent column name in the 'Your Column Name' box underneath (the text you enter must match the name of the column in your spreadsheet **exactly**).
- Click 'Add Column Match' to add the match.
- Do this for all of the columns in the spreadsheet that you wish to be included in the upload. If your spreadsheet contains any columns you do not wish to be included, simply leave them out of your column matches.
- When you have matched all of the necessary columns, click 'Save Matches'.
- You should now be able to upload your spreadsheet(s) following the steps in [3.1. Basic steps](#) above.
- Note: once your column matches are saved, they will be stored in your Editor account so that you can use them to upload further spreadsheets in future sessions. If you wish to upload further spreadsheets following a different format (i.e. with different column names) you will need to clear the matches you have already entered using the 'Clear Matches' button, and then add your new matches as described in the previous steps.
- For more information about the usage of each Hub column, see [5. Columns in the Archives Hub template](#) below.

### 3.3 Errors and issues

When you upload your spreadsheet you may see an 'Upload Spreadsheet Report' screen, with details of errors or potential issues the system has flagged. The report will tell you whether you need to fix a problem before trying the upload again, or you can carry on with the upload. You can always contact us if you are unsure.

Messages in the report tend to relate to three main issues:

1. Your column names were not recognised from either of the templates.
2. The sequence of your references was not as expected.
3. The sequence of your level values was not as expected.

The action you need to take differs depending on the message:

- If your column names are not correct, then the upload will fail. You can either use the [matching option](#) to match your column names, or edit your column names to match those in the Hub template.
- If a reference or level value is missing you will get an error message referencing the blank row.
- If the sequence of references or level values is not as expected, the system will flag the inconsistency, in case you want to check and correct your spreadsheet.
- Note that these will be suggestions based on the automated processing of your spreadsheet, and not necessarily errors. You can usually proceed by clicking 'OK'. Be aware though that **the upload flags each issue in turn**, so it will only flag the first issue it comes across. If you carry on with the upload, there may be other issues relating to the hierarchy that are not flagged.
- We recommend you check the hierarchy carefully in the Editor after upload.

An example relating to hierarchy:

- Two consecutive rows both have the level value 'item' but their respective references progress from GB/1/6/2/2 to GB/1/6/3, indicating a child/parent relationship. The system will flag this, in case the sequence should be GB/1/6/2/2, GB/1/6/2/3 or in case the level values need to be adjusted.
- You can simply click 'OK' to ignore this message and carry on uploading the description.
- See [Appendix B: More information about hierarchy](#) for more details and examples.
- See next section, [Creating the hierarchy](#) for more information

#### 4. Resolving errors in the Editor after upload

There are some requirements for descriptions being published on Archives Hub which do not apply to spreadsheets being uploaded to the Editor. You may therefore see some errors which need fixing in the Editor after you have uploaded your spreadsheet, and before you can publish the resulting description on Archives Hub. You may find it helpful to consult our [Editor guide](#) if you have errors to correct in the Editor.

Levels containing errors will be flagged in **red** in the hierarchy pane on the left. You may need to expand the hierarchy view to see all of the levels affected. You will need to correct the errors and save the description before you can make it live:

Contents

**D/061 Papers of Andrew Davies, screenwriter**

- ✖ D/061/A Produced titles
- ✖ D/061/A/001 The Hospitalization of Samuel Pellet
  - ✖ D/061/A/001/A Draft screenplay - [Invalid Date]
- ✖ D/061/A/002 Getting The Smell Of It

*A hierarchy showing where there is an invalid date that needs to be corrected. The folder is also coloured pink to indicate that corrections are needed.*

Within the main editing pane, fields will be highlighted in red that need to be completed or edited. If there are corrections to be made within the level that you have selected for editing (e.g. you are at collection level and there are errors at collection level) then you will be taken directly to the field that needs correcting when the level is loaded into the editing pane.

GB 418 E.3.11 Folder 2 no 3 (Current) [Duplicate Ref] ✖

GB 418 E.3.11/3 (Alternative) ✖

*A duplicate reference – one of these needs to be changed to make it unique.*

Dates

Invalid Date (181401815) ✖

*An invalid date that is not ISO compliant. Delete the date and re-enter it.*

Languages

*No language is provided at the top level. Add one or more languages.*

Once you have made a correction, you will need to save the record. You will be taken back to the top of the description, and can then select the next level with an error for editing if there are further errors, or make your description live if they have all been resolved.

In the case of index terms, if you select any individual terms to edit, the Editor will check them *at that point*. It will require you to edit them if they are not valid before you can save the description.

A name with incorrect datesRaines, Francis Robert, 1805-1778, Antiquary

<p><b>Surname:</b> <input type="text" value="Raines"/></p> <p><b>Pre-Title:</b> <input type="text" value="[None]"/></p> <p><b>Forename(s):</b> <input type="text" value="Francis Robert"/></p> <p><b>Dates:</b> <input type="text" value="1805-1778"/></p> <p><b>Title:</b> <input type="text"/></p> <p><b>Epithet:</b> <input type="text" value="Antiquary"/></p> <p><b>Viaf Id:</b> <input type="text"/></p>	<p><b>Source:</b> <input type="text"/></p> <p><input checked="" type="radio"/> Personal Name (Format 1) <input type="radio"/> Personal Name (Format 2) <input type="radio"/> Corporate Name <input type="radio"/> Family Name</p> <p style="text-align: right;"><input type="button" value="Update Name"/> <input type="button" value="Clear Name"/></p>	<p><i>If you click to edit the date, the editor will then check whether it is valid.</i></p>
--	--	--

You set the date to an invalid range (1805-1778), the 'year from' is after the 'year to'.

Error: invalid date

For more information on correcting errors and issues in the Editor, and using it for enhancing descriptions, consult our [Editor guide and online tutorials](#), or get in touch with us at [contributors.hub@jisc.ac.uk](mailto:contributors.hub@jisc.ac.uk).

## Appendix A: Columns in the Archives Hub template

The columns in the Archives Hub template correspond to fields commonly used when cataloguing archives. They cover a wide range of use cases, and allow for structuring of information such as dates, creator names and subjects/index terms (which improves the search functionality for users). If you wish to upload spreadsheets containing fields not included in the Hub template, contact us at [contributors.hub@jisc.ac.uk](mailto:contributors.hub@jisc.ac.uk) and we will identify a solution.

### Reference

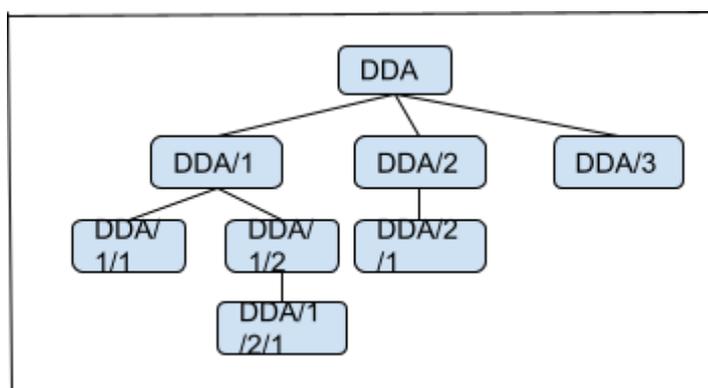
The reference for the archive collection. This will be displayed as the main reference for the record on Archives Hub.

The Archives Hub creates a globally unique identifier using your reference. Your references must always be unique. It is highly recommended you use consecutive numbering with the standard pattern of forward slashes to denote hierarchy.

e.g.

DDA	top level
DDA/1	first level
DDA/1/1	second level
DDA/1/2	second level
DDA/1/2/1	third level
DDA/2	first level

etc.



*Hierarchy based upon references*

### Former Reference

You can add a former reference if you wish to do so. You can only add one former reference for each level/row.

If the text is longer than 100 characters we will move it to the 'Other Descriptive Data' section.

### Alternative Reference

A reference that is still current and functions as an alternative to the main reference. You can only add one alternative reference for each level/row.

If the text is longer than 100 characters we will move it to the 'Other Descriptive Data' section.

### Level of Description

The level of description is the level of the current unit within the hierarchy that you are describing.

We provide a controlled list of values.

We provide both 'collection' and 'fonds' for the top level ('fonds' is only appropriate for a collection with a shared provenance).

#### **The levels provided are:**

collection

fonds

    sub-fonds

    sub-sub-fonds

    sub-sub-sub-fonds

series

    sub-series

    sub-sub-series

    sub-sub-sub-series

file

item

    sub-item

The set of level values need to be controlled because they are used to create the hierarchy.

You can use any of the lower values (from series) if your top level is collection or fonds. You can only use the fonds subdivisions, however, *if* your top level is fonds (i.e. you cannot use the fonds subdivisions if your top level has the value 'collection').

## Title

The name or a succinct description of the materials.

- Titles at the top level should uniquely identify the material with a short description and a term indicating the nature of the unit being described, e.g. 'papers'.
- Try to avoid very general titles at collection level such as 'Miscellaneous Papers', or titles that are too brief such as 'Cooper Collection' (a common surname - maybe add forename or initials to help identify the collection)
- Don't use only the creator name for the title (e.g. not 'Delia Derbyshire' but 'Papers of Delia Derbyshire').
- We recommend putting the dates into the date field rather than the title, as this makes it clearer to users what the dates signify.
- We recommend that titles should be more than a single word and not more than 500 characters in length.

## Display Dates

The display date(s) that end users will see. These dates can be in whatever format you choose, e.g.:

1890-1962

July 1968 - August 1972

Early 19th century

c 1850 - c 1980

24 July 1762

Note: if your display dates are in the exact format YYYY-YYYY, and you do not have start or end dates we will add them to the start and end date fields for you.

## Start and End Dates

These are standardised dates for searching/filtering, and they are not displayed. Typically, they will be a span of years, but you can add month and day as well.

They must be entered in the correct ISO format:

yyyy

yyyymm  
yyyymmdd

e.g.

1870  
18700324  
187012

If you include start and end dates, but not display dates, then your start and end dates will be used to create the display dates.

### Languages

It is mandatory to add the language of the material at the top level of your description. However you can add it in the Editor after upload if it is not included in your spreadsheet. You can add as many languages as you need to.

When adding languages in the spreadsheet, separate each language with a comma, semi-colon or pipe, e.g.:

English, French, German

or:

English | French | German

### Extent

Provides a description of the quantity of material covered by the description, or its physical scale. It is very important for researchers trying to assess the amount of material in a collection, or that they wish to consult. It is mandatory to add the extent of the material at the top level of your description. However you can add it in the Editor after upload if it is not included in your spreadsheet.

You should provide quantity and unit. Separate entries with a comma or brackets, e.g.:

24 boxes (3 cubic metres)  
3 boxes (includes 1 oversize box)  
5 volumes, 2 files

### Scope and Content

A description of the collection or materials. Include significant people, organisations, places, subjects and events where possible. It is very useful to researchers in helping them to assess the relevance of the material being described to their field of study.

It is mandatory to add Scope and Content at the top level of your description. However you can add it in the Editor after upload if it is not included in your spreadsheet.

Separate paragraphs of text by entering a line break (ALT + ENTER) between them. Paragraphs formatted in this way will be transferred to the Editor. Note that **any other text formatting will not be preserved during upload**. However you can add text formatting in the Editor after upload.

### Conditions Governing Access

Conditions that affect the availability of the materials being described. If there are no restrictions and materials are fully open, you could simply add 'Open for consultation'. This information is very important for researchers in helping them to assess whether they will be able to consult material.

It is mandatory to add Conditions Governing Access at the top level of your description. However you can add it in the Editor after upload if it is not included in your spreadsheet.

May include information about whether an appointment or written permission is needed to access the archive. May include details of restrictions on access imposed by the donor or the repository, or legal restrictions.

You can separate paragraphs of text by entering a line break (ALT + ENTER in Excel) between them.

### Name of Creator

This refers to the individual(s) or organisation(s) responsible for the creation/accumulation of the materials. They are not necessarily the author of any of the content.

At lower levels, some archives choose to use this field to identify authors, e.g. when describing a set of correspondence.

**Creator type:** We provide three columns for Name of Creator so that you can classify each name as relating to either a **person**, an **organisation** or a **family**. This means that users can search for your description based on these categories.

The upload requires **either** the presence of the Name of Creator(s) column (TNA template) or one of the Name of Creator - Persons/Organisations/Families columns. They do not have to be filled in (although we do recommend adding a name of creator).

You may add more than one name in each column. Separate each individual name with a pipe, e.g.:

Barker, Ronald William George. ( 1929-2005) | Corbett, Ronnie. ( 1930-2016)

If you have included information such as life dates, epithets etc in a name (which we highly recommend), you can assign these elements to the correct fields in the Editor after upload, so that all of the name information is properly structured. See our [Editor guide](#) for more information.

### Administrative/Biographical History

Information about the creator(s) of the material, to place it within context. Include significant information about the life and work of an individual or family, or the origin, administrative history and processes of a corporate body.

The biographical history can provide a useful way to add keywords that researchers might use to find your description. It is a good idea to think about people, organisations, places and events relating to the person/family/organisation you are describing. These entities should also be added as index terms if the collection is significantly about them. This can be done using the relevant 'Index Terms' columns in the spreadsheet template, or in the Editor after upload.

Separate paragraphs of text by entering a line break (ALT + ENTER) between them. Paragraphs formatted in this way will be transferred to the Editor. Note that **any other text formatting will not be preserved during upload**. However you can add text formatting in the Editor after upload.

### Subjects

Significant subjects represented in the materials being described. Separate each entry with a comma, semi-colon or pipe, e.g.:

Agriculture | Forestry | Fisheries

or:

Archaeology; Ecology

We recommend using a thesaurus, such as Unesco or Library of Congress, to choose your subject terms.

Note that you can only include single subject entries here. More complex subjects, such as Library of Congress Subjects with sub-divisions, can be added after upload in the Editor. See our [Editor guide](#) for more information.

### **Index Terms - Persons, Organisations, Family Names and Places**

Persons, organisations or family names significantly represented in the materials being described.

In the case of personal names, it is helpful to add life dates, birth dates or death dates if you can.

In the case of place names, include the country in order to uniquely identify the place, e.g.:

Oxford, England.

Separate each name with a semi-colon or a pipe, e.g.:

Bridge, Frank, 1879-1941, composer | Britten, Edward Benjamin, 1913-1976, Baron Britten of Aldeburgh, composer

### **Archivist's Note**

Information about accessioning, arranging, describing, preserving, or storing the materials, or preparing the description itself for research use.

You can separate paragraphs of text by entering a line break (ALT + ENTER in Excel) between them.

### **Digital Material Link**

Add a URL to a reliable location for an image or other digital content that you host. Images can be in any format and other types of material such as word processing documents or PDFs can also be included. If the image is high resolution, the Archives Hub will display a thumbnail in the description, and the user can click on this to view the full image.

Digital content is very popular with researchers, and also enhances the appearance of your descriptions on Archives Hub.

You can add as many URLs as you wish, just separate multiple links with a semi-colon or a pipe, e.g.:

<http://about.brighton.ac.uk/designarchives/hub/jpeg/GB-1837-DES-DCA-10-1-2.jpg> |  
<http://about.brighton.ac.uk/designarchives/hub/jpeg/GB-1837-DES-DCA-10-1-3.jpg> |  
<http://about.brighton.ac.uk/designarchives/hub/jpeg/GB-1837-DES-DCA-10-1-4.jpg>

A substantial number of URLs that have been provided in the past are now no longer working. Please be sure the location of your digital content will not change, or if it does, implement redirects or update your description.

### Digital Material Description

A title or short description for the image or digital item you have linked to in 'Digital Material Link'. It is not mandatory to provide this for digital materials, but can help researchers to understand what they are viewing.

If you have added multiple URLs in the 'Digital Material Link' column, then each description should relate to the respective URL in your list of URLs.

Separate each description by a semi-colon or a pipe.

### Arrangement

Provides information on the physical or logical ordering of the archival material, e.g.:

This material is maintained in its original order.

You can separate paragraphs of text by entering a line break (ALT + ENTER in Excel) between them.

### Finding Aids

Indicates whether any other finding aids exist and whether they are available to the user. You may wish to add a link to your own catalogue. If so, you need to add a full URL (with the 'https'), e.g.:

<https://archiveshub.jisc.ac.uk/data/gb71-thm/407>

You can separate paragraphs of text by entering a line break (ALT + ENTER in Excel) between them.

### Related Material

Information about materials which are **not** part of the collection, but which may be of interest to researchers because they are on the same topic, cover the same event, or have some other kind of association. Include here details of relevant material held in the same repository or by other repositories.

You can separate paragraphs of text by entering a line break (ALT + ENTER in Excel) between them.

### Separated Material

Information about materials which are linked to the collection by provenance, but which may have been removed, destroyed, or physically separated. Use 'Related Material' for a more general association between materials, where the relation is not due to provenance or accumulation.

You can separate paragraphs of text by entering a line break (ALT + ENTER in Excel) between them.

### Dimensions

More typically used for individual items, so may be more appropriate for lower level records. May, for example, provide the measurement for an individual book, letter or photograph, e.g.:

10cm x 24cm

### Genres/Forms

Includes both genre (style) and form (function). May refer to the type of material, style or technique of their intellectual content.

Separate each entry with a comma, e.g.:

photographs, manuscripts, architectural drawings, sound recordings, account books, diaries

### Appearance

Information about an aspect of the appearance of the described materials, such as their colour, style, marks, substances, materials, or techniques and methods of creation, e.g.:

bound in 18th century red leather

### **Accruals**

Use this column to indicate if further materials will be or are likely to be added to the archive. Can be used to state quantity and frequency of additions.

You can separate paragraphs of text by entering a line break (ALT + ENTER in Excel) between them.

### **Appraisal**

Use this column to provide information about how the archival materials were assessed by the archivist or cataloguer, how long they will be retained by the repository, and whether any of the material has been removed, or is scheduled to be removed.

You can separate paragraphs of text by entering a line break (ALT + ENTER in Excel) between them.

### **Conditions Governing Reproduction**

Information on restrictions on copying, quoting or publishing material from within the collection.

You can separate paragraphs of text by entering a line break (ALT + ENTER in Excel) between them.

### **Custodial History**

Information about the history of the ownership or care of the collection. Custodial history helps to demonstrate authenticity and integrity, and can aid interpretation of the materials.

You can separate paragraphs of text by entering a line break (ALT + ENTER in Excel) between them.

### **Immediate Source of Acquisition**

Identifies where the repository acquired the materials from and in what circumstances. Date of acquisition can also be added.

You can separate paragraphs of text by entering a line break (ALT + ENTER in Excel) between them.

### Location of Copies

If you are describing original material, you can add the location of surrogates or duplicates.

You can separate paragraphs of text by entering a line break (ALT + ENTER in Excel) between them.

### Location of Originals

If you are describing surrogates or duplicates, you can add the location of the original material.

You can separate paragraphs of text by entering a line break (ALT + ENTER in Excel) between them.

### Note

Used for descriptive information that does not fit into any of the other columns.  
**Use other more specific columns where possible.**

You can separate paragraphs of text by entering a line break (ALT + ENTER in Excel) between them.

### Publications

Publications which are based on, or written about, material in the collection, or may be of value to researchers using the collection. Individual publications are not treated as separate entries, but you can separate paragraphs of text by entering a line break (ALT + ENTER in Excel) between them.

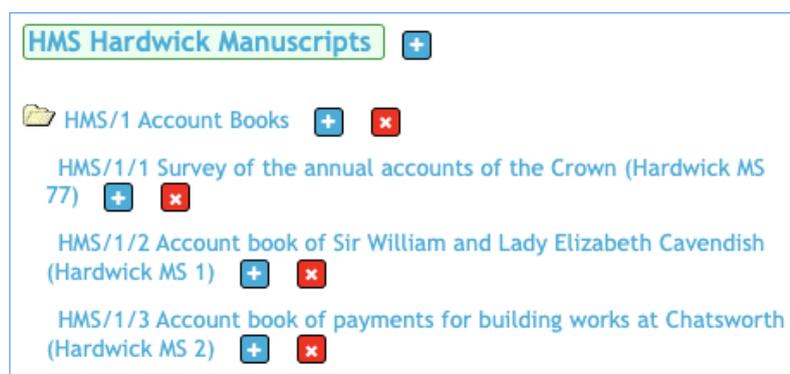
## Appendix B: More information about hierarchy

### Creation of the hierarchy

If the description uses slashes consistently to identify parent/child relationships, with consecutive numbering, then our processing will use these to create the hierarchy.

	A	D	E
1	Reference	Level of Description	Title
2	HMS	Fonds	Hardwick Manuscripts
3	HMS/1	Series	Account Books
4	HMS/1/1	File	Survey of the annual accounts of the Crown (Hardwick MS 77)
5	HMS/1/2	File	Account book of Sir William and Lady Elizabeth Cavendish (Hardwick MS 1)
6	HMS/1/3	File	Account book of payments for building works at Chatsworth (Hardwick MS 2)

*Spreadsheet with consecutive references using slashes*



*Processed file showing Archives Hub folder structure*

If the references are not completely consistent, then the processing will fall back on the level values to create the hierarchy instead.

HMS/1/5	HM/4	File
HMS/16	HM/5	File
HMS/1/7	HM/6	File
HMS/1/8	HM/7	File

*If there is an inconsistency, such as ref HMS/16 here, then the processing will use the level values for the hierarchy. It would flag the reference HMS/16 as potentially incorrect.*

As with the references, if the system detects an inconsistency in the level values it will be flagged at upload, so you can decide whether to ignore it or address it.

HMS	Fonds	Hardwick Manuscripts
HMS/1	Series	Account Books
HMS/1/1	File	Survey of the annual accounts of the Crown (Hardwick MS 77)
HMS/1/2	Series	Account book of Sir William and Lady Elizabeth Cavendish (Hardwick MS 1)
HMS/1/3	File	Account book of payments for building works at Chatsworth (Hardwick MS 2)
HMS/1/4	File	Household account book of Lady Elizabeth Cavendish (Hardwick MS 3)

*Spreadsheet with 'series' level that does not seem to reflect the hierarchy*

### Upload Spreadsheet Report

Your spreadsheet Chats-HMS-HubTemplate.xlsx can be uploaded, but our system has flagged some inconsistencies. These may be intentional or you may wish to revise them before upload :

There is an inconsistency in your hierarchy, derived using the Level Of Description column.  
Check your spreadsheet at row 5 - Reference code : HMS/1/2.

If these issues are not of concern & you are happy to proceed, Click OK to continue the upload.  
Otherwise, click Cancel to return to the Upload Description page, fix these issues & try again later.

*You can choose to proceed, as you may be happy with the level values and corresponding hierarchy*

If you encounter a message like this, you can click 'OK' to proceed with the upload, and change the reference or level value afterwards in the Editor if you wish, or 'Cancel' to go back and edit your spreadsheet before trying the upload again.

**Note:** if you correct the discrepancy in your spreadsheet and then try the upload again, you may find you get further flags, as our processing looks at each anomaly in turn (it cannot report all issues at once). You may therefore find that you need to repeat the process several times.

You will always have the option to upload anyway. The flagged value may not be an error, or you may wish to fix it in the Editor.

**Note:** if you carry on with the upload, there may be further reference errors in your description that will be visible once it is loaded into the Editor. Note also that the version of your description in the Editor **will differ from your original**

**spreadsheet.** You should consider this carefully if you intend to make changes to the spreadsheet in the future.



You can make corrections in the Editor, but this will introduce version control issues if you still want to work with the Spreadsheet in future.

### Some more examples

Notebook, notes on parliamentary	HEIN/2/1/20
Notebook, notes on the Communist Party,	HEIN/2/1/21
Notes on Thomas Carew, John Donne,	HEIN/2/122
Notebook, drafts of portions of a novel set	HEIN/2/1/23
Notebook, early draft of sections of The	HEIN/2/1/24
Notes for lectures on the 1930s: notes for	HEIN/2/1/25
Notes on teaching and students and	HEIN/2/1/26

*The references in this example are not consistent*

The above example shows references that go from HEIN/2/1/21 to HEIN/2/122. This will be flagged when you upload. You can continue to upload, or you may wish to amend the entry and try uploading again.

sub-series	SEID/1/3/3
file	SEID/1/3/3/1
file	SEID/1/3/3/2
file	SEID/1/3/3/3
file	SEID/1/3/3/4
file	SEID/1/3/4
file	SEID/1/3/4/1
sub-series	SEID/1/3/5
file	SEID/1/3/5/1
sub-series	SEID/1/3/6
file	SEID/1/3/6/1

*The level values suggest that SEID/1/3/4 should be sub-series.*

The above example shows where our processing looks at the level values and references and spots an anomaly. This is not necessarily an error, but the system will flag it for you so that you can decide what to do.

file	SEID/1/6/82
file	SEID/1/6/83
file	SEID/1/6/83
file	SEID/1/6/85
file	SEID/1/6/86
file	SEID/1/6/87
file	SEID/1/6/88

*Here ref 1/6/83 has been repeated twice in error. This will be flagged, so that you can correct it.*

If you have any duplicate references, these will be flagged. You can choose to carry on with the upload, but the duplication will still display as an error in the Editor, and must be corrected before you can publish your description.

F/34/2/1	File	Press Clippings
F/34/2/2	Item	Obituary of General Sir Hubert Gough
F/34/2/3	File	Festival of Britain

*The Report will flag F/34/2/2 as it expects a 'File' here, but you may be happy with the entry as it stands.*

## Appendix C: Multi-value cells quick reference

The table below shows which columns allow the entry of multiple values in a single cell, and which separators can be used to separate individual values in each. If you do not use separators, or use different ones to those shown in the table, the individual values will not be identified correctly during upload.

Column	Separators allowed
Languages	comma - [ , ]; semi-colon - [ ; ]; pipe - [   ]
Extent	comma - [ , ]; semi-colon - [ ; ]; pipe - [   ]
Name of Creator - Persons	semi-colon - [ ; ]; pipe - [   ]
Name of Creator - Organisations	semi-colon - [ ; ]; pipe - [   ]
Name of Creator - Families	semi-colon - [ ; ]; pipe - [   ]
Genre/Form	comma - [ , ]
Subjects	comma - [ , ]; semi-colon - [ ; ]; pipe - [   ]
Persons (Index Terms)	semi-colon - [ ; ]; pipe - [   ]
Organisations (Index Terms)	semi-colon - [ ; ]; pipe - [   ]
Family Names (Index Terms)	semi-colon - [ ; ]; pipe - [   ]
Place Names	semi-colon - [ ; ]; pipe - [   ]
Digital Material Link	semi-colon - [ ; ]; pipe - [   ]
Digital Material Description	semi-colon - [ ; ]; pipe - [   ]

## Appendix D: TNA's column names and Archives Hub equivalents

<b>TNA column name</b>	<b>Archives Hub column name</b>
Reference Code	Reference
Name of Creator(s)	Name of Creator - Persons Name of Creator - Organisations Name of Creator - Families
Covering Dates	Display Dates
Physical Characteristics	Appearance <i>also potentially Genres/Forms</i>
Language	Languages
Publication Note	Publications
Related Units of Description	Related Material
Legal Status	n/a