

Chapter 12

Linking Name and Subject Records to Accession and Resource Records

The primary purpose of name and subject 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.

When a needed subject term or name does not yet exist in the Toolkit, it can be created directly from within the accession or description record while in the process of assigning a source, creator, subject name, or other subject term to that record.

This chapter describes procedures for adding terms to accession and resource records, and for creating new subject terms and names. See Chapter 11 for instructions on creating new terms directly within the **Names** and **Subjects** functional areas.

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 resource record. You may add the name as a source for the materials, as a creator of the materials, or as a subject documented in the materials. In addition to these functions, you may further refine information about the entity's relationship to the materials by recording a role for a creator, source, or subject, and by adding a form subdivision to a subject. Neither of these two options is required.

The function, role, and form fields do not become part of the name record, but instead are part of the link between the name record and the description or accession record.

1. **Name Link Function.** The function of the name, either creator, source, or subject, in relation to this accession, description resource, description component record, digital object record, or digital object component record. The same name can be linked multiple times to an accession, description, or component record, as long as the function, role and form division 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. If desired, sources for descriptive components may be recorded in the **Immediate Source of Acquisition** note.

2. **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.

3. **Form Subdivision.** This field is for 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.

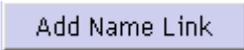
Examples:

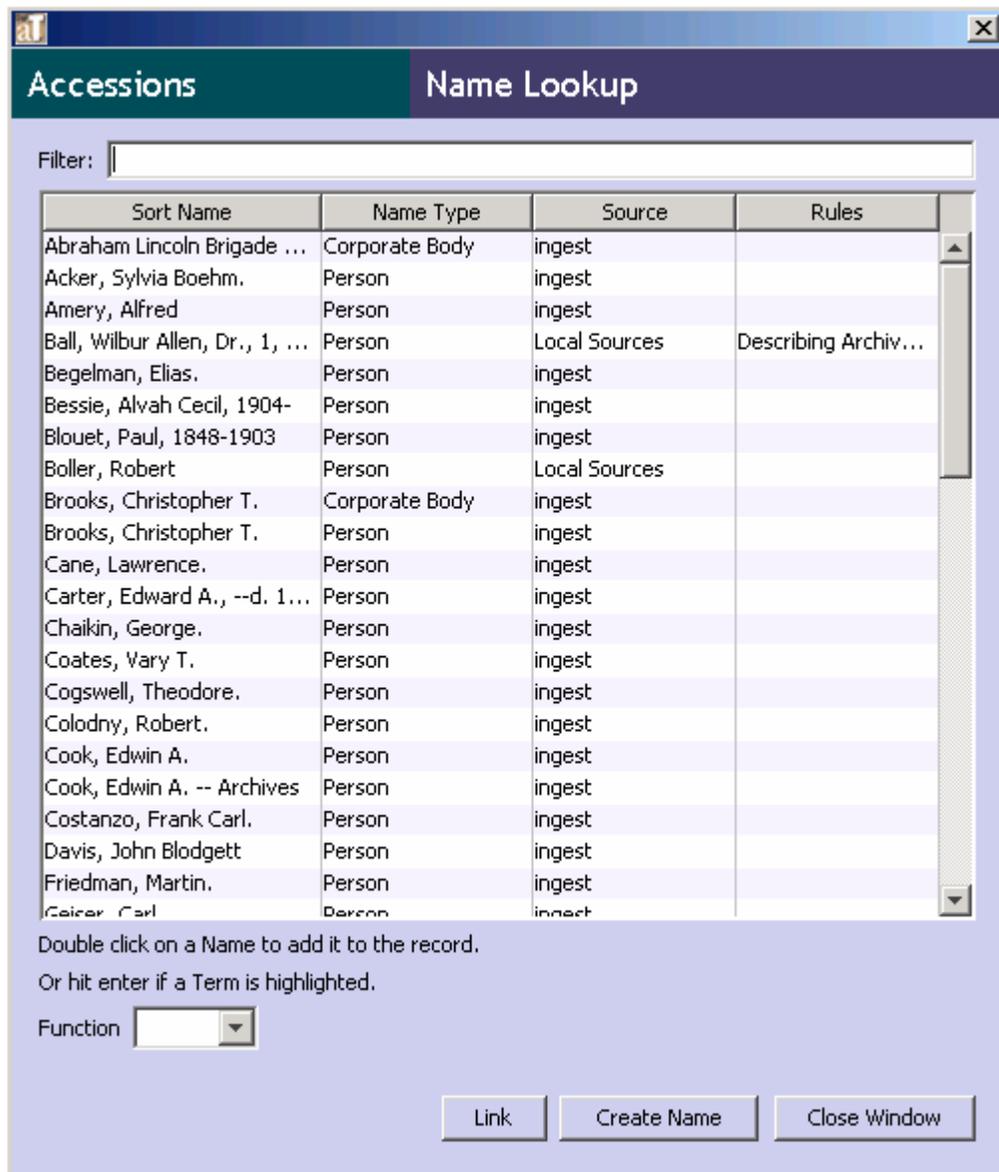
Correspondence (for Salk, Jonas--Correspondence.)

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

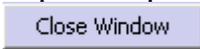
1. From the **Names & Subjects** tab of an accession or resource record, press the  button. The Toolkit will display a list of names available.



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, and 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 Lookup** window, where the new name has been added to the list.
 - c. Select a **Name Link Function** for the name: Creator, Source, or Subject. *This step is required.*

3. If the desired name(s) appears in the list, select the name and then choose a **Name Link Function** for the name(s): Creator, Source, or Subject. *This step is required.*

Note If you are selecting multiple names, they must be linked with the same **Name Link Function**.

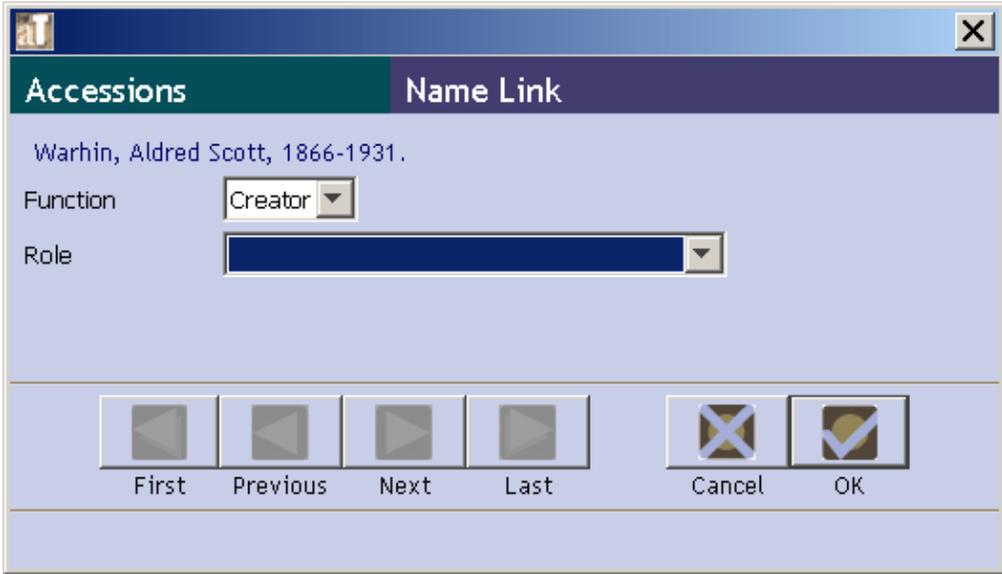
4. If you wish, select a more specific role for the creator from the **Role** field. The **Role** will be applied to all names, if more than one is selected.
5. For names as subjects, you may also choose to add a **Form Subdivision**. The **Form Subdivision** will be applied to all names if more than one is selected.
6. Once you have selected a name and a function, and have identified the role and subdivision (if so desired), press the  button, or double-click the name in the list. The name(s) will be added to the open accession or resource record.
7. Repeat the process of selecting names as often as necessary, and then press the  button to return to the accession or resource 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 resource record.

1. Retrieve and open the accession or resource record that contains the name.
2. From the **Names & Subjects** tab of an accession or resource record, select the name whose link is to be modified.
3. Press the  button or double click on the name.

The Toolkit will open a window showing the current settings for the **Name Link Function**, **Role**, and if applicable, **Form Subdivision**. Make the desired changes to these elements.

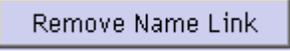


The screenshot shows a dialog box titled "Name Link" with a close button (X) in the top right corner. The dialog has a dark blue header bar with the text "Accessions" on the left and "Name Link" on the right. Below the header, the name "Warhin, Aldred Scott, 1866-1931." is displayed. There are two fields: "Function" with a dropdown menu showing "Creator" and "Role" with a dropdown menu that is currently empty. At the bottom of the dialog, there are two rows of buttons. The first row contains four navigation buttons: "First", "Previous", "Next", and "Last", each with a corresponding arrow icon. The second row contains two buttons: "Cancel" with a red X icon and "OK" with a green checkmark icon.

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 or resource record, select the name whose link is to be modified.
3. Press the  button.
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.

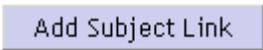
Adding subjects

Overview

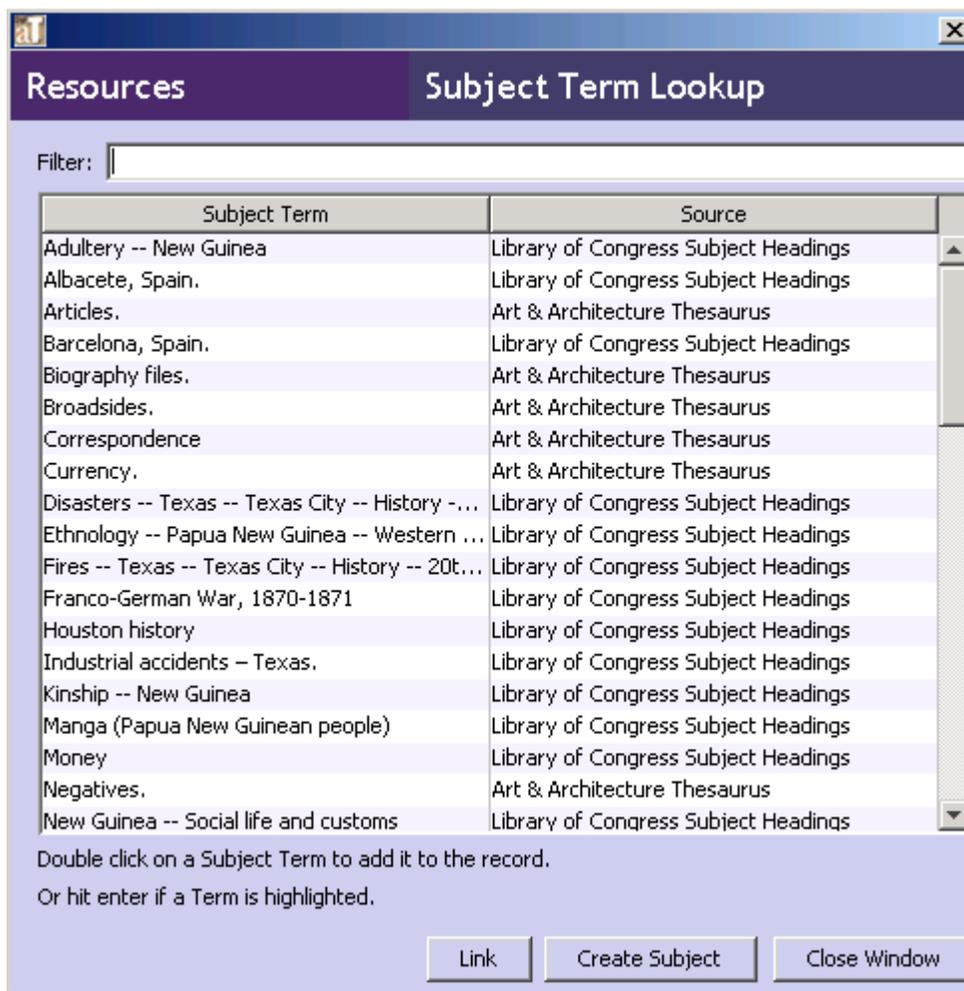
The accession and resource record templates include command buttons for assigning subject terms to these records, and for removing a subject term that was previously assigned to the record. Once a subject term is assigned, it will appear in the accession or description record and in any accession or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

Assigning subjects

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

1. From the **Names & Subjects** tab of an accession or resource record, select the  button.

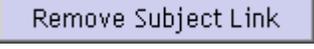
The Toolkit will display a list of subject terms available.



2. Scroll or filter through the list of subjects to determine if the subject term is currently in the Toolkit
3. If the subject is in the Toolkit, select the subject term and click on the **Link** button, or double-click on the term to link the subject to the accession or resource record. 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 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 will now appear in the list.
5. Repeat the process of selecting terms as often as necessary, and then press the **Close Window** button to return to the accession or resource record, or select multiple terms and add them at the same time.

Removing subjects

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

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

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