CANADIAN ARCHIVAL ACCESSION INFORMATION STANDARD

CONSULTATION DRAFT

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Canadian Council of Archives
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PART I: INTRODUCTION

ACCESSIONING

An accession commonly means an "action or an act of joining something to something else; addition; augmentation."[1] An archival accession is the physical and legal addition of predominantly unpublished documentary material to an archival repository's holdings. In most cases, accessioning follows an archival appraisal decision designating the material as having enduring value in relation to the acquisition mandate and policies of the repository. In other cases, archival appraisal and selection may occur after material is accessioned. An accession added to an existing archival fonds or collection is called an accrual or, more rarely, an accretion. As nouns, contemporary archival literature makes little distinction between accession and acquisition; both terms refer to a discrete aggregation of documentary material entering the archival repository in a coordinated act.

An accession record captures important information in the accession process, including the nature of acquired archival material and its source. Accession information supports the preliminary physical and intellectual control of acquired material. This information supports subsequent archival functions including arrangement and description, preservation, and access.

Specific institutional policies and practices determine the accession process. There may, therefore, be some degree of information variance across the archival community. However, the components of the accession process are sufficiently consistent to support the development of this standard for accession record information.

SCOPE AND APPLICATION

The Canadian Archival Accession Information Standard (CAAIS) specifies the information elements necessary for documenting the accessioning process in an archival repository. Typically archives accession aggregates of records, rather than single items, though single item accessions can also be accommodated by this standard. An accession record created in accordance with this standard reflects the completion of the accessioning process, while also accommodating updates to existing accession records after other related processes have occurred (e.g. processing completed; removal process/de-accessioning completed).

While accession records are not ordinarily used for discovery purposes, some information elements may be directly carried over or reused in a descriptive record. In some contexts, accession records may function as *de facto* descriptive records and be made available to the public for use (e.g., due to delays in completing arrangement and description processes).

INTENDED AUDIENCE

The primary audience of this standard is archivists and other archives personnel who are responsible for managing the receipt of transfers of material to archival repositories, in particular those who complete an accessioning process that results in an accession record being created. Archives personnel who may not be directly responsible for accessioning but who are responsible for connected processes (e.g., arrangement and description, preservation, or removal of holdings) would also benefit from a familiarity with the standard and the process it documents.

Another audience of this standard is information technology professionals who are involved in designing or maintaining archival collections management software applications.

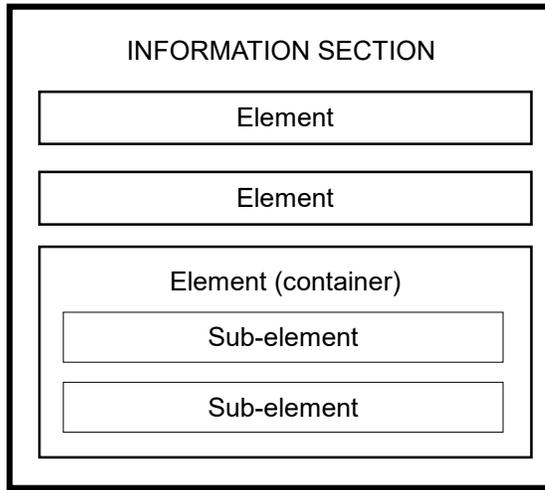[1] "accession, n.2a." *OED Online*. Oxford University Press, December 2016. Web. 9 December 2016.

ORGANIZATION

This standard consists of information elements that comprise an accession record, organized into seven different information sections:

Information Identity Section	information uniquely identifying the repository and the accession record itself. Also includes identifying information about the method of transfer; the legal means by which the material was transferred to the repository; and information about related material already within the repository's holdings, when applicable.
Source Information Section	information on the source of the material, or who had created, held custody of, or transferred the material to the repository. Repeating Source of Material information elements can enable a fulsome custodial history.
Materials Information Section	date, language, and extent information about the materials accessioned, as well as a description of its scope and content. Extent information differentiates between quantity and type of units, as well as storage requirements. Extent received is specifically noted, as it may differ from the extent eventually retained.
Management Information Section	storage location, rights and permissions information, material assessment information (which identifies and supports planning for future preservation activities that may be needed), information about appraisals (for archival value, for monetary value), and associated documentation that contextualizes or enables discovery of the accessioned material.
Event Information Section	information about actions taken by repository staff as part of the accessioning process.
General Information Section	general note(s) in order to capture any other relevant information that is not accommodated by other elements in the standard.
Control Information Section	information on the creation of the accession record and any modifications to the record over time.

Fig. 1. Information sections in CAAIS

In some cases, an information element functions as a 'container' that groups a set of related 'sub-elements.' In such cases, information is not recorded at the level of container; rather, information is recorded only for each of the sub-elements within the container.

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┌─────────────────────────────────────────┐
│          INFORMATION SECTION            │
│  ┌───────────────────────────────────┐  │
│  │              Element              │  │
│  └───────────────────────────────────┘  │
│  ┌───────────────────────────────────┐  │
│  │              Element              │  │
│  └───────────────────────────────────┘  │
│  ┌───────────────────────────────────┐  │
│  │         Element (container)       │  │
│  │  ┌─────────────────────────────┐  │  │
│  │  │         Sub-element         │  │  │
│  │  └─────────────────────────────┘  │  │
│  │  ┌─────────────────────────────┐  │  │
│  │  │         Sub-element         │  │  │
│  │  └─────────────────────────────┘  │  │
│  └───────────────────────────────────┘  │
└─────────────────────────────────────────┘
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Fig. 2. Organization of CAAIS

Where an element is a container, its sub-elements are identified. Information shall not be recorded at the level of container; rather, information shall be recorded in each of the sub-elements within the container. For example, the Source of Material element consists of five sub-elements: Source Type; Source Name; Source Contact Information; Source Role; Source Note. Each grouping of sub-elements comprises one information element that describes a single source of material. Figure two illustrates this example:

2.1 Source of Material		--
	2.1.1 Source Type	Person
	2.1.2 Source Name	Sally Smith
	2.1.3 Source Contact Information	123 Apple Lane Toronto, ON
	2.1.4 Source Role	Creator
	2.1.5 Source Note	Ms. Smith also retains a summer residence at 456 Pear St., Victoria, BC

Fig. 3. Example of container Element with Sub-elements

Each element and sub-element is described using a consistent presentation, comprised of a selection of the following types of information:

Definition	A concise statement explaining what information the element or sub-element adds to the accession record. General definitions for certain terms used throughout the standard are provided in the Glossary.
Purpose	A statement describing the reason(s) why the element is important, and what it supports or helps achieve. Sub-elements do not contain purpose statements, as their specific purpose would be a part of the broader purpose that was stated at the container element level.
Sub-elements	Where applicable, a list of sub-elements that comprise the parent information element. Sub-elements are only provided for container elements.
Obligation	An indication of whether the element or sub-element must be recorded; whether it should be recorded but only if a certain condition is present; or whether it is optional to record it. Information about the condition is indicated as part of the Implementation Guidelines. The specific values available for use here are: **Mandatory**—a core element of the standard, and the minimum level of information required for compliance. **Conditional**—should a certain condition exist, this element becomes mandatory. **Optional**—these elements exist to provide extra context or custodial management options throughout the accessioning process.
Repeatable	An indication of whether the element or container element can occur more than once in an accession record. The value recorded here is either 'Yes' or 'No'.
Implementation Guidelines	Guidance on using an element or sub-element. May suggest usage of standards or conventions for formatting the information, or a particular vocabulary scheme. Can also include information on conditions that must be present for an element to be recorded, in the case of conditional obligation, as noted above.
Examples	Examples of the element or sub-element values. In the case of a container element, examples are only provided for sub-elements, as information would only be recorded at that level. Where the Implementation Guidelines recommend using a controlled vocabulary, examples can be used as the basis of the vocabulary.

Fig. 4. Type of information recorded for each Element or Sub-element description

TOOLS FOR IMPLEMENTING THIS STANDARD

To assist with implementing this standard, the following tools are included:

- Appendix A: Summary of Element and Sub-element Obligations

- Appendix B: Sample Accession Form comprising all mandatory elements as summarized in Appendix A.

Further implementation guidance will be provided in a companion document to this standard, "Canadian Archival Accession Information Standard: A Discussion Paper" (forthcoming).

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PART II: INFORMATION ELEMENTS OF ACCESSION RECORDS

1. IDENTITY INFORMATION SECTION

1.1 Repository

Definition	The name of the institution that accepts legal responsibility for the accessioned material.
Purpose	To associate a repository with accessioned material. To differentiate between institutions in a multi-repository database environment.
Obligation	Mandatory
Repeatable	No
Implementation Guidelines	Give the authorized form(s) of the name of the institution in accordance with the repository's descriptive standard.
Examples	Colchester Historeum Beaton Institute Archives Archives of Ontario

1.2 Accession Identifier

Definition	A unique and persistent code that is assigned to the accessioned material.
Purpose	To uniquely and persistently identify the material. To support the location and retrieval of the material. To link all relevant information surrounding a transfer of material to a repository.
Obligation	Mandatory
Repeatable	No
Implementation Guidelines	Assign a unique accession identifier using a standardized system for generating numeric or alphanumeric codes.

Examples	2015-45
	A-2001/3
	CA ON00345 1989-045

1.3 Other Identifier

Definition	A code that otherwise identifies the material or parts of the material.
Purpose	To document other identifiers assigned to the material.
	To associate the material to processes and activities that generate identifiers.
Sub-elements	1.3.1 Other Identifier Type
	1.3.2 Other Identifier Value
	1.3.3 Other Identifier Note
Obligation	Optional
Repeatable	Yes
Implementation Guidelines	Container element: use sub-elements to record other identifiers that have been generated or assigned to the material in the course of processes and activities such as acquisition, transfer, ingest, and conservation.

1.3.1 Other Identifier Type

Definition	A term or phrase that characterizes the other identifier assigned to the material in the course of processes and activities such as acquisition, transfer, ingest, and conservation.
Obligation	Mandatory when using element 1.3
Implementation Guidelines	Where accession activities generate or assign their own unique identifiers, record the other identifier type in accordance with a controlled vocabulary maintained by the repository.
Examples	Conservation treatment number
	Receipt number
	Identifier from records system
	Accession identifier assigned by transferring institution

1.3.2 Other Identifier Value

Definition	A code that is assigned to the material in the course of processes and activities such as acquisition, transfer, ingest, and conservation.
Obligation	Mandatory when using element 1.3
Implementation Guidelines	Where accession activities generate or assign their own unique identifiers, record the other identifier value as received or generated by the repository.
Examples	R902932 (*where Other Identifier Type is temporary receipt number*) 007235 *(where Other Identifier Type is temporary receipt number)* R2484 (*where Other Identifier Type is registration number*)

1.3.3 Other Identifier Note

Definition	Additional information about the identifier, including contextual information on the purpose of the identifier.
Obligation	Optional
Implementation Guidelines	Record additional information about the identifier, such as contextual information on the purpose of the identifier.
Examples	Receipt number generated by repository management software (*where Other Identifier Type is temporary receipt number)* Registration number is auto-generated by Collection Management System (*where Other Identifier Type is registration number*)

1.4 Accession Title

Definition	The name assigned to the material.
Purpose	To identify the source and nature of the material.
Obligation	Mandatory
Repeatable	No
Implementation Guidelines	Supply an accession title in accordance with the repository's descriptive standard, typically consisting of the creator's name(s) and the type of material. The accession title may be an interim title and may be subject to revision during processing.

Examples	Al Purdy fonds
	Effie Ellerbeck album
	175th Anniversary Committee minutes

1.5 Archival Unit

Definition	The archival unit or the aggregate to which the accessioned material belongs.
Purpose	To identify the archival unit (e.g. fonds, series, file) to which the accessioned material belongs. This unit may be an aggregate of material already held by the repository.
	To indicate whether accessioned material forms a new archival unit within a repository.
Obligation	Mandatory
Repeatable	Yes
Implementation Guidelines	Record the reference code and/or title of the archival unit to which the accession belongs.
	Optionally, indicate whether the accessioned material is an accrual.
Examples	F-10 (*showing reference code*)
	Wilson Duff fonds (*showing title*)
	Accrual to the Correspondence sub-series in the Office of the Provost series.
	First accession in the Yousuf Karsh fonds.

1.6 Acquisition Method

Definition	The process by which a repository acquires material.
Purpose	To identify the method by which material enters a repository, which may be useful for supporting statistical exercises.
Obligation	Mandatory
Repeatable	No
Implementation Guidelines	Record the acquisition method in accordance with a controlled vocabulary.

Examples	Transfer
	Donation
	Donation for tax receipt
	Purchase
	Gift

1.7 Disposition Authority	
Definition	A reference to policies, directives, and agreements that prescribe and allow for the transfer of material to a repository.
Purpose	To identify the authority according to which materials are transferred to the repository.
	To enable searching and retrieval of materials acquired by a repository through reference to a specific authority or agreement.
Obligation	Conditional
Repeatable	No
Implementation Guidelines	Record information about any legal instruments that apply to the accessioned material. Legal instruments include statutes, records schedules or disposition authorities, and donor agreements.
	Use this element only when the accessioned material is subject to a legal instrument that authorizes records' disposition and transfer to a repository.
Examples	"Commission of Inquiry Records," (schedule 112907), 1992-06-29 Ministry of Technology, Innovation and Citizens' services, Approval Date: 1992-06-29.
	"Access and Privacy Advice and Subject Files," SFU Records Retention Schedule and Disposal Authority (RRSDA), RSDA number, 2000-007.
	Institutional Records in the Office of a Minister, Library and Archives Canada, Multi-Institutional Disposition Authority No. 96/021
	Contract signed between Dalhousie University and the Oland family, 25 November 2005.

2. SOURCE INFORMATION SECTION

2.1 Source of Material

Definition	The individual, corporation, or other body responsible for the material before its transfer to the institution.
Purpose	To create access points that uniquely identify the creator(s) and immediate source(s) of materials accessioned. To identify the agents involved in the creation, custody, and transfer of the accessioned material.
Sub-elements	2.1.1 Source Type
	2.1.2 Source Name
	2.1.3 Source Contact Information
	2.1.4 Source Role
	2.1.5 Source Note
Obligation	Mandatory
Repeatable	Yes
Implementation Guidelines	Container element: use sub-elements to record, at a minimum, the creator(s) and immediate source(s) of the materials accessioned. If there are multiple agents involved in legal control or the chain of custody prior to being accessioned by the repository, record as many sources as required or known.

2.1.1 Source Type

Definition	A term describing the nature of the source.
Obligation	Optional
Implementation Guidelines	Record the source type in accordance with a controlled vocabulary maintained by the repository. If unknown, give type as "Unknown."

Examples	Corporate body
	Person
	Family
	University department
	Government office
	Community organization
	Societal provenance
	Unknown

2.1.2 Source Name

Definition	The proper name of the source of the material.
Obligation	Mandatory
Implementation Guidelines	Record the source name in accordance with the repository's descriptive standard. If unknown, give name as "Unknown."
Examples	Neptune Theatre
	Halpern family
	Jack Chiang
	Department of English
	Ministry of Finance
	Habitat Acquisition Trust
	We Wi Kai Nation
	Unknown

2.1.3 Source Contact Information

Definition	Information that can be used to locate and contact the source.
Obligation	Mandatory
Implementation Guidelines	Record the source contact information when known. Where possible include contact name, job title, street address, telephone number(s), and email address(es). If unknown, give contact information as "Unknown."
	Repositories may wish to break this element into commonly used address and contact information fields, including City, Province or State, Postal Code.

Examples	123 Fake St. Vancouver, BC V6T 7U8 Unknown

2.1.4 Source Role

Definition	The relationship of the named source to the material.
Obligation	Mandatory
Implementation Guidelines	Record source role when known. If unknown, give role as "Unknown." Record the source role in accordance with a controlled vocabulary maintained by the repository.
Examples	Immediate source of acquisition Creator Donor Custodian

2.1.5 Source Note

Definition	An open element to capture any additional information about the source, or circumstances surrounding their role.
Obligation	Optional
Implementation Guidelines	Record any other information about the source of the accessioned materials. If the source performed the role for only a specific period of time (e.g. was a custodian for several years), record the dates in this element. Information contained in other sub-elements should not be duplicated here.
Examples	Material was found in the archives backlog with no associated documentation regarding the donor (*source note for unknown source*). The donor wishes to remain anonymous (*source note for donor*). Halifax Municipal Archives transferred the materials in accordance with the Council of Nova Scotia Archives' Cooperative Acquisition Strategy (*source note for related heritage institution*). President stored records in personal residence from 1978 to 1982 (*source note with dates*).

2.2 Custodial History	
Definition	Information about the chain of agents, in addition to the creator(s), that have exercised custody or control over the material at all stages in its existence.
Purpose	To describe both physical possession and intellectual ownership of the accessioned material.
	To provide details of changes of ownership or custody that are significant in terms of authority, integrity, and interpretation.
Obligation	Optional
Repeatable	No
Implementation Guidelines	Provide relevant custodial history information in accordance with the repository's descriptive standard.
	Record the successive transfers of ownership, responsibility and/or custody of the accessioned material prior to its transfer to the repository.
	This element provides space for a single narrative description incorporating all custodial information that may be registered as separate source entries in 2.1 above.
Examples	Jane B. Wisdom's records were in the custody of researcher Jean MacFadgen from the 1970s until 2006, when Ms. MacFadgen sent them to Suzanne Morton, Professor and Acting Director of The McGill Institute for the Study of Canada. It is presumed the records remained in Dr. Morton's custody until 2014, when they were donated to Nova Scotia Archives by Jock MacKay, grand-nephew of Jane B. Wisdom, upon the recommendation of Dr. Morton.

3. MATERIALS INFORMATION SECTION

3.1 Date of Material	
Definition	A date or date range indicating when the materials were known or thought to have been created.
Purpose	To capture what is known at the time of accessioning about the date(s) of creation of the accessioned material.
Obligation	Mandatory
Repeatable	No

Implementation Guidelines	Institutions should develop their own standards for the accuracy of date information that is expected at the time of accessioning. Archivists can determine creation dates more precisely during arrangement and description. During accessioning, it is generally sufficient to convey a reasonably accurate date or date range based on information gathered during the acquisition process. Record probable and uncertain dates using the conventions outlined in accordance with the repository's descriptive standard.
Examples	1980-1985 [ca. 1890]-1954

3.2 Extent Statement

Definition	The physical or logical quantity and type of material.
Purpose	To describe the physical or logical characteristics of the material.
Sub-elements	3.2.1 Extent Statement Type
	3.2.2 Quantity and Type of Units
	3.2.3 Extent Note
Obligation	Mandatory
Repeatable	Yes
Implementation Guidelines	Container element: use sub-elements to record, at a minimum, the extent received. Optionally, record a statement of extent retained if there is a difference between the extent received and the extent retained and/or record a statement of extent removed if material is removed from the repository during or after accessioning. Some institutions may want to implement this element in a broad fashion by recording a single Extent Statement for the total number of boxes received, for example. Others may want a more granular approach that breaks down the materials by type. In the latter case, record separate Extent Statements for each type, e.g. paper textual records, photographs, digital moving images.

3.2.1 Extent Statement Type

Definition	A term that characterizes each extent statement.
Obligation	Mandatory

Implementation Guidelines	Record the extent statement type in accordance with a controlled vocabulary maintained by the repository.
Examples	Extent received
	Extent retained
	Extent removed

3.2.2 Quantity and Type of Units

Definition	The number and type of containers, carriers, or items received, retained, or removed.
Obligation	Mandatory
Implementation Guidelines	Record the quantity and type of units in accordance with a repository's descriptive standard, with type of units being derived from a controlled vocabulary. Use 'ca.' to express estimates.
	Qualify the type of unit with additional container or format information provided in parentheses.
Examples	ca. 5 m of textual records and photographs
	12 boxes of textual records
	ca. 250 architectural drawings (10 folders)
	ca. 200 videocassettes (20 boxes)
	6 photographs (tiff)
	2.4 MB of textual records
	1.2 GB of photographs (2 CD-ROMs)

3.2.3 Extent Statement Note

Definition	Additional information related to the number and type of units received, retained, or removed not otherwise recorded.
Obligation	Optional
Implementation Guidelines	Record any other information relevant to describing the extent of material.
	This may also include anticipated storage required once the material has been processed, especially for digital media.

Examples	Master and reference copies to be generated prior to placing original videocassettes in cold storage, requiring approximately 30 TB of digital file space.
	Some materials were received in plastic bags, and these have been combined into one box.

3.3 Scope and Content

Definition	A description of the functions and activities that generated the accessioned material as well as information about its arrangement (organizational structure or relationships) and documentary forms.
Purpose	To indicate the breadth of the content of the material.
Obligation	Mandatory
Repeatable	No
Implementation Guidelines	Record a summary that includes: functions and activities that resulted in the material's generation, dates, the geographic area to which the material pertains, subject matter, arrangement, classification, and documentary forms. This is recorded as a free text statement.
Examples	Accession consists of manuscripts, drafts, and research notes.
	Accession contains material relating to Arthur Doughty's work on the Accession Standards Committee, including draft manuscripts, correspondence, and other materials.

3.4 Language of Material

Definition	The language(s) and script(s) represented in the accessioned materials.
Purpose	To identify the language(s) and script(s) in which the accessioned materials are available.
Obligation	Mandatory
Repeatable	Yes
Implementation Guidelines	Record languages and scripts in accordance with a controlled vocabulary maintained by the repository.
	Record, at a minimum, the language that is predominantly found in the accessioned material.
	If there is no language content, then record "No linguistic content."

Examples	In Dakota, with partial English translation
	Materials entirely in English
	en (English)
	fr (French)
	No linguistic content

4. MANAGEMENT INFORMATION SECTION

4.1 Storage Location

Definition	The physical or logical location where the material resides.
Purpose	To identify the location of accessioned material within a repository.
	To support planning and management of financial, staff, conservation and physical resources at the repository.
	To maintain the material as a unit and prevent intermingling with other incoming or existing archival material.
Obligation	Mandatory
Repeatable	Yes
Implementation Guidelines	Indicate the physical and/or digital location(s) within the repository in which the accessioned material is stored. Since accessioning represents establishing preliminary control of the records, it is possible that its location may change during the accession process. If this is the case, until the records have a permanent storage location, the accession location would be considered preliminary. Storage locations are based on the in-house practices of each repository.
Examples	401-R03-B02-S5 - S8 (Indicates that material is stored in Rm. 401, Row 3, Bay 2, Shelves 5 to 8)
	Isolation Room, shelf 7
	Chief Archivist's office
	Z:\Digital_Records\Friends_of_Salmon_River-2015-011\

4.2 Rights Statement

Definition	The assertion of one or more rights pertaining to the material.

Purpose	To document the rights of the repository to manage and provide access to accessioned material.
Sub-elements	4.1.1 Rights Statement Type
	4.1.2 Rights Statement Value
	4.1.3 Rights Statement Note
Obligation	Mandatory
Repeatable	Repeatable
Implementation Guidelines	Container element: use sub-elements to record, at a minimum, rights statements relating to copyright and any access restrictions.

4.2.1 Rights Statement Type

Definition	A term that characterizes a rights statement.
Obligation	Mandatory
Implementation Guidelines	Record the rights statement type in accordance with a controlled vocabulary maintained by the repository.
	If the basis for the rights is fair dealing or public domain, use "Copyright."
Examples	Copyright
	Access
	License
	Statute
	Cultural rights

4.2.2 Rights Statement Value

Definition	The parameters and conditions pertaining to the rights statement.
Obligation	Mandatory
Implementation Guidelines	Record the nature and duration of the permission granted or restriction imposed.
	Specify where the condition applies only to part of the accession.

Examples	Copyright resides with the estate (*where Rights Statement Type is "Copyright"*)
	Public domain (*where Rights Statement Type is "Copyright"*)
	Letters to donor's family members restricted until Dec 31, 2050 (*where Rights Statement Type is "Access"*)
	Repository has a license to disseminate digital access copies via the Internet (*where Rights Statement Type is "License"*)
	Records are subject to the Province of Ontario's Freedom of Information and Protection of Privacy Act (FIPPA) (*where Rights Statement Type is "Statute"*)
	Recordings of Hamatsa ceremonies are restricted according to cultural protocols (*where Rights Statement Type is "Cultural rights"*)

4.2.3 Rights Statement Note

Definition	Additional information related to the rights statement not otherwise recorded.
Obligation	Optional
Implementation Guidelines	Record any other information relevant to describing the rights statement.
Examples	The accession contains medical records interspersed throughout and researcher agreements must be signed before providing access to the material (*where Rights Statement Type is "Access"*).
	The accession potentially contains orphan works (*where Rights Statement Type is "Copyright"*)
	A copyright risk assessment must be completed during archival processing (*where Rights Statement Type is "Copyright"*)
	Researchers should consult community representatives to determine appropriate access protocols (*where Rights Statement Type is "Cultural rights"*)

4.3 Material Assessment Statement

Definition	Information about assessments relating to the physical condition of the material.
Purpose	To provide information about physical characteristics or condition that may affect the ability to access or use the material.
	To identify any actions taken for the conservation or long-term preservation of the accessioned material.
	To indicate material that is at-risk of becoming inaccessible and that requires active intervention to ensure long-term accessibility.

Sub-elements	4.3.1 Material Assessment Statement Type
	4.3.2 Material Assessment Statement Value
	4.3.3 Material Assessment Action Plan
	4.3.4 Material Assessment Statement Note
Obligation	Mandatory
Repeatable	Yes
Implementation Guidelines	Use sub-elements to record, at a minimum, a statement of the physical condition of the material.
	Specify other preservation or conservation concerns. Alternatively, specify where no preservation concerns are noticed.
	Use preservation statements to provide information about material in the accession that is known to be at-risk of becoming inaccessible due to physical damage or degradation; that requires special equipment or technology to access its content; or that will require specific supplies or expertise to preserve.

4.3.1 Material Assessment Statement Type

Definition	A term that characterizes a material assessment statement.
Obligation	Mandatory
Implementation Guidelines	Record the material assessment statement type in accordance with a controlled vocabulary maintained by the repository.
Examples	Physical condition
	Conservation
	Supplies
	Labour
	Technical access

4.3.2 Material Assessment Statement Value

Definition	A description of the material's physical state or any preservation concerns identified, including anticipated preservation or conservation activities, conditions required for access, and plans for long-term preservation.

Obligation	Mandatory
Implementation Guidelines	Record information about the assessment of the material with respect to its physical condition, processing or access. Identify any notable actions required to take on the material to preserve and make accessible. Use "ca." to express estimates.
Examples	No preservation issues identified. Material is generally in good condition, except for one box of textual material with water damage (*where Material Assessment Type is "Physical condition"*) Material requires ca. 100 hours to treat, rehouse, and copy to make accessible (*where Material Assessment Type is "Labour"*) Film to be accessed through video copies. Access to original film requires 16mm viewer (*where Material Assessment Type is "Technical Access"*) Film requires rehousing to twenty-five 16 mm 1200' polypropylene cans (*where Material Assessment Type is "Supplies"*)

4.3.3 Material Assessment Action Plan

Definition	A statement addressing the action(s) required to be taken resulting from the material assessment.
Obligation	Optional
Implementation Guidelines	Record the planned response to each of the physical requirements for preservation and access to the material.
Examples	Textual material with water damage will be placed in the freezer and remediated for mould (*where Material Assessment Statement Type is "Physical condition"*) Includes videos in U-matic tape format that require a U-matic tape deck to access (*where Material Assessment Statement Type is "Technical access"*). Required supplies include 20 records storage boxes and ten 400' 16 mm polypropylene film canisters (*where Material Assessment Statement Type is "Supplies"*) Includes nitrate negatives. Digitize and place negatives in cold storage (*where Material Assessment Statement Type is "Conservation"*)

4.3.4 Material Assessment Statement Note

Definition	Additional information related to the material assessment not otherwise recorded.
Obligation	Optional

Implementation Guidelines	Record any other information relevant to describing the assessment of material.
Examples	A number of U-matic tapes are manufactured by Sony in the 1980s, and have been known to suffer from sticky shed syndrome. If the playback quality is poor, stop playing the cassette, and flag for baking and digitization (*where Material Assessment Type is "Technical access"*) Digitization should take approximately 3 hours to complete (*where Material Assessment Type is "Conservation"*)

4.4 Appraisal Statement

Definition	Information about archival or monetary appraisal activities relating to the material.
Purpose	To record information concerning the archival and monetary values of the accessioned material.
Sub-elements	4.4.1 Appraisal Type
	4.4.2 Appraisal Value
	4.4.3 Appraisal Note
Obligation	Optional
Repeatable	Yes
Implementation Guidelines	Container element: use sub-elements to record appraisals of the material accessioned. Fulsome information about the appraisal(s) may be maintained in a separate filing system.

4.4.1 Appraisal Statement Type

Definition	A term that characterizes the appraisal.
Obligation	Mandatory when using element 4.4
Implementation Guidelines	Record the appraisal statement type in accordance with a controlled vocabulary maintained by the repository.
Examples	Archival appraisal Monetary appraisal

4.4.2 Appraisal Statement Value

Definition	A statement identifying any decisions made on the appraisal and selection of material, or outlining monetary appraisal details.
Obligation	Mandatory when using element 4.4
Implementation Guidelines	Where the accession process includes appraisal activities, record the appraisal statement value. For archival appraisal, it would be useful to record at minimum any material not kept as part of the accession. For monetary appraisals, it would be useful to record at minimum that the material has been appraised.
Examples	Publications were not kept, and were returned to the donor (*where Appraisal Type is "Archival appraisal"*) The material was evaluated at $75,000 (*where Appraisal Type is "Monetary appraisal"*)

4.4.3 Appraisal Statement Note

Definition	Additional information related to the appraisal not otherwise recorded.
Obligation	Optional
Implementation Guidelines	Record any other information relevant to describing the appraisal activities. For archival appraisal, this element may be used to specify the point in the process when appraisal and selection occurred.
Examples	Archival appraisal was conducted during accessioning (*where Appraisal Type is "Archival appraisal"*) An inventory of the publications not kept can be found in the accession documentation (*where Appraisal Type is "Archival appraisal"*) Independent evaluations were conducted by NAAB. The average of their appraisals was assigned by CCPERB (*where Appraisal Type is "Monetary appraisal"*)

4.5 Associated Documentation

Definition	A reference to any documentation related to the material in the accession.
Purpose	To identify documentation pertinent to the material in the accession, either with respect to its acquisition or to its preliminary description.

Sub-elements	4.5.1 Associated Documentation Type
	4.5.2 Associated Documentation Title
	4.5.3 Associated Documentation Note
Obligation	Optional
Repeatable	Yes
Implementation Guidelines	Container element: use sub-elements to provide a reference for documentation related to the material in the accession, when applicable. This reference may specify a physical location for this documentation or it may consist of a link to an electronic file.

4.5.1 Associated Documentation Type	
Definition	A term that characterizes the type of documentation related to the material.
Obligation	Mandatory when using element 4.5
Implementation Guidelines	Where the accession process generates associated documents, record the associated documentation type in accordance with a controlled vocabulary maintained by the repository.
Examples	Finding aid
	Temporary receipt
	Deed of gift
	Transfer form
	Context documentation

4.5.2 Associated Documentation Title	
Definition	Name of the documentation related to the accessioned material.
Obligation	Mandatory when using element 4.5
Implementation Guidelines	Record the title of the associated documentation. This may be assigned by the originator of the documentation or by the repository.

Examples	//Server/Finding_Aids/Fleming-Sir_Sandford-2128.xlsx (*where Associated Documentation Type is "Finding aid"*)
	"My life in shambles" (*where Associated Documentation Type is "Contextual documentation"*)
	DoG-Geoffrey_Simpson-2016-034.pdf (*where Associated Documentation Type is "Deed of gift"*)
	Records Management database - Record ID 78846 (*where Associated Documentation Type is "Transfer form"*)

4.5.3 Associated Documentation Note

Definition	Additional information related to associated documentation not otherwise recorded.
Obligation	Optional
Implementation Guidelines	Record any other information relevant to describing documentation associated to the accessioned material.
Examples	Preliminary box listing is stored in the accession file
	Donor prepared a biographical sketch to accompany donation (*where Associated Documentation is "Contextual documentation"*)

5. EVENT INFORMATION SECTION

5.1 Event Statement

Definition	The actions taken by repository staff throughout the accession process.
Purpose	To record information about the accession process.
	To create an audit trail of actions taken by the repository's staff.
Sub-elements	5.1.1 Event Type
	5.1.2 Event Date
	5.1.3 Event Agent
	5.1.4 Event Note
Obligation	Mandatory

Repeatable	Yes
Implementation Guidelines	Container element: use sub-elements to record, at a minimum, details of the transfer or receipt of the material, and when the Deed of Gift or Transfer Agreement has been signed, when applicable. Exclude information about the creation or maintenance of the accession record itself, which is recorded in the Control Information Section, element 7.3 Date of Creation or Revision.

5.1.1 Event Type

Definition	A term that characterizes the type of event documented in the accession process.
Obligation	Mandatory
Implementation Guidelines	Record the event type in accordance with a controlled vocabulary maintained by the repository.
Examples	Physical transfer Legal transfer Deed of Gift signed Transfer Agreement signed Ceremonial protocol acknowledging value Reboxing started Reboxing completed Archival appraisal Deaccessioned

5.1.2 Event Date

Definition	The calendar date on which the event occurred
Obligation	Mandatory
Implementation Guidelines	Record the date an event occurred. Record an event date in accordance with the repository's descriptive standard.
Examples	June 19, 2003 (*where Event Type is "Deed of Gift signed"*) 23 Nov. 2010 (*where Event Type is "Reboxing started"*) 15 Dec. 2010 (*where Event Type is "Reboxing completed"*)

5.1.3 Event Agent	
Definition	The repository staff member responsible for the event.
Obligation	Mandatory
Implementation Guidelines	Record the name of the staff member responsible for the event.
	The name should be formatted consistently in accordance with the repository's descriptive standard.
Examples	de Wailly, Natalis
	Barr, Debra, 1954-2008
	posnere

5.1.4 Event Note	
Definition	Additional information related to the event not otherwise recorded.
Obligation	Optional
Implementation Guidelines	Record any other information relevant to describing the event.
Examples	Material received from donor via Canada Post (*where Event Type is "Physical Transfer"*)
	Material was transferred to the Toronto Public Library (*where Event Type is "Deaccessioned"*)

6. GENERAL INFORMATION SECTION

6.1 General Note	
Definition	Additional information relating to the accession process or material that is not otherwise captured.
Purpose	To provide an open text element for repositories to record any relevant information not accommodated elsewhere in this standard.
Obligation	Optional
Repeatable	No

Implementation Guidelines	Record any other information relevant to the accession record or accessioning process.
Examples	Processing archivist will need to determine provenance of the material; it is unclear whether some or all of the records were created in the donor's capacity as Provincial Apiarist (assign material to F-110) or in role as officer of the BCHPA (assign material to F-147). See note to file on Collection file.

7. CONTROL INFORMATION SECTION

7.1 Rules or Conventions

Definition	The rules, conventions or templates that were used in creating or maintaining the accession record.
Purpose	To identify local, national or international standards, rules, conventions or data entry templates that were used in creating the accession record.
Obligation	Optional
Repeatable	No
Implementation Guidelines	Record information about the standards, rules or conventions that were followed when creating or maintaining the accession record. Indicate the software application if the accession record is based on a data entry template in a database or other automated system. Give the version number of the standard or software application where applicable.
Examples	Canadian Archival Accession Information Standard, v1.0 *(where accession record is based on a standard)* Originally created with Queen's University Archives' in-house Microsoft Office Word Accession template, v. 3 *(where accession record is derived from a data entry template)* Originally created with AtoM v2.1 Accession form *(where accession record is based on data entry template in a database application)*

7.2 Level of Detail

Definition	The degree to which the accession record includes mandatory and optional elements.
Purpose	To indicate whether the accession record applies a minimal, partial or a full level of detail.

Obligation	Optional
Repeatable	No
Implementation Guidelines	Record the level of detail in accordance with a controlled vocabulary maintained by the repository.
Examples	Minimal *(where accession record includes all elements this standard designates as "mandatory")*
	Partial *(where accession record includes all elements this standard designates as "mandatory" and "conditional")*
	Full *(where accession record includes all elements in this standard)*

7.3 Date of Creation or Revision	
Definition	Date(s) on which the accession record was created or revised.
Purpose	To document changes to the accession record over time.
Sub-elements	7.3.1 Action Type
	7.3.2 Action Date
	7.3.3 Action Agent
	7.3.4 Action Note
Obligation	Mandatory
Repeatable	Yes
Implementation Guidelines	Container element: use sub-elements to record, at a minimum, create at least one entry recording the date on which the accession record was created and by whom (name of the repository staff member).

7.3.1 Action Type	
Definition	The type of action applied to the accession record.
Obligation	Mandatory
Implementation Guidelines	Record the action type in accordance with a controlled vocabulary maintained by the repository.

Examples	Record created
	Record revised

7.3.2 Action Date

Definition	The date on which the action was applied to the accession record.
Obligation	Mandatory
Implementation Guidelines	Record the date on which the action (creation or revision) occurred.
	Format dates consistently in accordance with the repository's descriptive standard.
Examples	Jan 17, 2017 *(where date value standard = Month Abbreviation DD, YYYY)*
	2017-08-22 *(where date value standard = YYYY-MM-DD)*

7.3.3 Action Agent

Definition	The repository staff member responsible for the action applied to the accession record.
Obligation	Mandatory
Implementation Guidelines	Record the name of the staff member who performed the action (creation or revision) on the accession record.
	Format names consistently in accordance with the repository's descriptive standard.
Examples	Margaret Cross Norton *(where name standard = FirstName LastName)*
	Jenkinson, Hilary *(where name standard = LastName, FirstName)*
	samuelsh *(where name standard = computing account name)*

7.3.4 Action Note

Definition	Additional information describing the action performed on the accession record.
Obligation	Optional
Implementation Guidelines	Record any information summarizing actions applied to the accession record.

Examples	Minimal preliminary data captured (*where Action Type is "Record created"*)
	Scope and Content and Rights Statements added on receipt of Donation Agreement (*where Action Type is "Record revised"*)

7.4 Language of Accession Record

Definition	The language(s) and script(s) used to record information in the accession record.
Purpose	To indicate the language(s) and script(s) in which the accession record is available.
Obligation	Optional
Repeatable	No
Implementation Guidelines	Record the language(s) and script(s) used to create the accession record. If the content has been translated and is available in other languages, give those languages. Provide information about script only where it is common to use multiple scripts to represent a language and it is important to know which script is employed.
Examples	English with French translation (*where the accession record is available in multiple languages*).
	Written in Latin script (*where the accession record is written in Ukrainian*)
	Inuktitut (syllabics) with English (Latin) translation (*where original accession record is in Inuktitut (syllabics); this is the English translated version*)

GLOSSARY

The CAAIS glossary provides general definitions of certain terms used throughout the standard. Definitions provided as part of each information element specifically describe the kind of information that should be recorded in the accession record. Sources are provided at the end of this section.

Accession	
Definition	Noun: 1. Materials physically and legally transferred to a repository as a unit at a single time. Verb: 2. To take legal and physical custody of a group of records or other materials and to formally document their receipt. 3. To document the transfer of records or materials in a register, database, or other log of the repository's holdings.
Source	SAA Glossary: Accession [adapted]

Accession record	
Definition	A record documenting the repository's acceptance of responsibility for preserving a clearly identified set of records.
Source	InterPARES Terminology: Accession record [adapted]

Accrual	
Definition	An acquisition which belongs to a unit of archival material already in the custody of the repository.
Source	RAD Glossary: Accrual

Acquisition	
Definition	1. An addition to the holdings of a repository. (Note: an acquisition may not have already been accessioned). 2. The process of adding to the holdings of a records center or archives by transfer under an established and legally based procedure, by deposit, purchase, gift, or bequest.
Source	1. RAD Glossary: Acquisition 2. ICA Dictionary: Acquisition 2.1

Agent	
Definition	A person or group, or an entity created by a person or group, that is responsible for actions taken and their effects.

Source	ICA-RiC Definitions: Agent

Appraisal (archival)

Definition	A basic records management/archival function of determining the value and thus the disposition of records based upon their current administrative, legal, and fiscal use; their evidential and informational value; their arrangement and condition; and their relationship to other records.
Source	ICA Dictionary: Appraisal 5.

Appraisal (monetary)

Definition	The process of determining a fair market value for materials.
Source	SAA Glossary: Appraisal 3. [adapted]

Archival description

Definition	1. The process of capturing, analyzing, organizing, and recording information that serves to identify, manage, locate, and explain the holdings of archives and manuscript repositories and the contexts and records systems which produced them. 2. The products of the above process.
Source	ICA Dictionary: Archival description

Archival unit

Definition	Any of the groupings of archival documents comprising a fonds or collection as delineated during the process of archival arrangement. An archival unit can be a fonds, collection, series, file, item or variation thereof, depending on institutional standards.
Source	InterPARES Terminology: Archival unit [adapted]

Custodial history

Definition	The succession of offices or persons who had custody of a body of documents from its creation to its acquisition by a repository.
Source	ICA Dictionary: Custodial history [adapted]

Deaccessioning

Definition	The process by which a repository permanently removes materials from its holdings.

Source	SAA Glossary: Deaccessioning [adapted]

Disposition

Definition	Materials' final destruction or transfer to a repository as determined by their archival appraisal.
Source	SAA Glossary: Disposition [adapted]

Donor agreement

Definition	A document that details an agreement relating to the transfer of ownership of property, and establishes terms and conditions relating to access and use.
Source	SAA Glossary: Deed [adapted]

Event

Definition	An action taken in the accessioning process.
Source	CAAIS

Extent

Definition	The physical dimensions or logical size of the accessioned material.
Source	AGRkMS Definitions: Extent [adapted]

Identifier

Definition	An unambiguous reference to an entity that serves to uniquely and permanently identify it.
Source	Dublin Core Terms: Identifier [adapted]

Material

Definition	Generic term to describe the variety of items that an archives might acquire, regardless of medium, format, or type; may be analogue or digital and may be used to describe a group of individual items.
Source	SAA Glossary: Material [adapted]

Preservation	
Definition	The whole of the principles, policies, rules and strategies aimed at prolonging the existence of an object by maintaining it in a condition suitable for use, either in its original format or in a more persistent format, while leaving intact the object's intellectual form.
Source	InterPARES Terminology: Preservation

Records disposition authority	
Definition	An instrument granting an agency the right to transfer materials to the archives or to destroy them.
Source	SAA Glossary: Disposition authority [adapted]

Repository	
Definition	An organization which keeps and preserves archival material and makes it accessible to the public.
Source	ISDIAH Glossary: Institution with archival holdings

Rights	
Definition	Assertions of one or more legal entitlements, cultural protocols or permissions pertaining to the accessioned material.
Source	PREMIS Glossary: Rights [adapted]

Source	
Definition	Information regarding the provenance, origins, custody, and ownership of accessioned materials.
Source	SAA Glossary: Provenance 2. [adapted]

Transfer	
Definition	Change of physical custody and/or legal control from a source to a repository.
Source	ICA Dictionary: Transfer [adapted]

Glossary Sources

AGRkMS Definitions	National Archives of Australia, *Australian Government Recordkeeping Metadata Standard (AGRkMS) Version 2.2*. Canberra: Commonwealth of Australia (National Archives of Australia), 2015. http://www.naa.gov.au/Images/AGRkMS-Version-2%2E2-June-2015_tcm16-93990.pdf.
Dublin Core Terms	Dublin Core Metadata Initiative, *DCMI Metadata Terms*, accessed March 6, 2017, http://dublincore.org/documents/dcmi-terms/.
ICA Dictionary	International Council on Archives, *Multilingual Archival Terminology – Dictionary of Archival Terminology (Draft Third Edition/DAT III, 1999)*, accessed March 6, 2017, http://www.ciscra.org/mat/mat/termlist/l/English.
ICA-RiC Definitions	Experts Group on Archival Description, *Records in Contexts: a Conceptual Model for Archival Description, Consultation Draft V0.1*. International Council on Archives, 2016. http://www.ica.org/sites/default/files/RiC-CM-0.1.pdf.
InterPARES 2 Terminology	InterPARES 2 Project, *Terminology Database*, accessed March 6, 2017, http://www.interpares.org/ip2/ip2_terminology_db.cfm.
ISDIAH Glossary	Committee on Best Practices and Standards, *ISDIAH International Standard for Describing Institutions with Archival Holdings*. London: International Council on Archives, 2008. http://www.ica.org/sites/default/files/CBPS_2008_Guidelines_ISDIAH_First-edition_EN.pdf.
PREMIS Glossary	PREMIS Editorial Committee, *PREMIS Data Dictionary for Preservation Metadata version 3.0*. Library of Congress, 2015. http://www.loc.gov/standards/premis/v3/premis-3-0-final.pdf.
RAD Glossary	Planning Committee on Descriptive Standards, *Rules of Archival Description (RAD)*. Ottawa: Bureau of Canadian Archivists, 2008. http://www.cdncouncilarchives.ca/rad/radcomplete_july2008.pdf.
SAA Glossary	Pearce-Moses, Richard, *Glossary of Archival and Records Terminology*. Chicago: The Society of American Archivists, 2016. http://www2.archivists.org/glossary/.

Appendix A:
Summary of Element and Sub-element Obligations

Element Name	Obligation	Sub-element Name (where applicable)	Sub-element Obligation (where applicable)
1. Identity Information Section			
1.1 Repository	Mandatory		
1.2 Accession Identifier	Mandatory		
1.3 Other Identifiers	Optional	1.3.1 Other Identifier Type	Mandatory when using Element 1.3
		1.3.2 Other Identifier Value	Mandatory when using Element 1.3
		1.3.3 Other Identifier Note	Optional
1.4 Accession Title	Mandatory		
1.5 Archival Unit	Mandatory		
1.6 Acquisition Method	Mandatory		
1.7 Disposition Authority	Conditional		
2. Source Information Section			
2.1 Source of Material	Mandatory	2.1.1 Source Type	Optional
		2.1.2 Source Name	Mandatory
		2.1.3 Source Contact Information	Mandatory
		2.1.4 Source Role	Optional
		2.1.5 Source Note	Mandatory
2.2 Custodial History	Optional		

Element Name	Obligation	Sub-element Name (where applicable)	Sub-element Obligation (where applicable)
3. Materials Information Section			
3.1 Date of Material	Mandatory		
3.2 Extent Statement	Mandatory	3.2.1 Extent Statement Type	Mandatory
		3.2.2 Number and Type of Units	Mandatory
		3.2.3 Extent Note	Optional
3.3 Scope and Content	Mandatory		
3.4 Language of Material	Mandatory		
4. Management Information Section			
4.1 Storage Location	Mandatory		
4.2 Rights Statement	Mandatory	4.2.1 Rights Statement Type	Mandatory
		4.2.2 Rights Statement Value	Mandatory
		4.2.3 Rights Statement Note	Optional
4.3 Material Assessment	Mandatory	4.3.1 Material Assessment Type	Mandatory
		4.3.2 Material Assessment Value	Mandatory
		4.3.3 Material Assessment Action Plan	Optional
		4.3.4 Material Assessment Note	Optional
4.4 Appraisal Statement	Optional	4.4.1 Appraisal Type	Mandatory when using Element 4.4
		4.4.2 Appraisal Value	Mandatory when using Element 4.4
		4.4.3 Appraisal Note	Optional
4.5 Associated Documentation	Optional	4.5.1 Associated Documentation Type	Mandatory when using Element 4.5
		4.5.2 Associated Documentation Title	Mandatory when using Element 4.5
		4.5.3 Associated Documentation Note	Optional

Element Name	Obligation	Sub-element Name (where applicable)	Sub-element Obligation (where applicable)
5. Event Information Section			
5.1 Event Statement	Mandatory	5.1.1 Event Type	Mandatory
		5.1.2 Event Date	Mandatory
		5.1.3 Event Agent	Mandatory
		5.1.4 Event Note	Optional
6. General Information Section			
6.1 General Note	Optional		
7. Control Information Section			
7.1 Rules of Conventions	Optional		
7.2 Level of Detail	Optional		
7.3 Date of Creation or Revision	Mandatory	7.3.1 Action Type	Mandatory
		7.3.2 Action Date	Mandatory
		7.3.3 Action Agent	Mandatory
		7.3.4 Action Note	Optional
7.4 Language of Accession Record	Optional		

APPENDIX B:
SAMPLE ACCESSION FORM — MINIMAL LEVEL

This sample accession form is an example of how a repository might apply the accession standard in accordance with its institutional workflows and descriptive standard.

1. Identity Information Section

Repository

Accession Identifier

Accession Title

Archival Unit

Acquisition Method

Disposition Authority (if applicable)

2. Source Information

Creator

Name

Contact Information

Immediate Source of Acquisition

Name

Contact Information

3. Materials Information Section

Date of Material

Extent Received

Quantity of Units	Type of Units

Scope and Content

Language of Material

4. Management Information Section

Storage Location

Copyright Information

Conditions of Access

Material Assessment: Physical Condition

5. Event Information Section

Type of Event	Date	Agent
Physical transfer		
Legal transfer		
Deed of Gift signed		
Transfer Agreement signed		

6. General Information Section

General Note

7. Control Information Section

Dates of Creation and Revision

Type of Action	Date	Agent
Record created		
Record revised		
Record revised		
Record revised		

APPENDIX C:
NATIONAL ARCHIVAL ACCESSION STANDARD WORKING GROUP MEMBERS

Current Members (in alphabetical order):

- Creighton Barrett, Dalhousie University

- Richard Dancy, Simon Fraser University

- Raymond Frogner, National Research Centre for Truth and Reconciliation, University of Manitoba

- Jeremy Heil, Queen's University

- Cheryl Linstead, Royal BC Museum, BC Archives

- Katherine Timms, Library and Archives Canada / Bibliothèque et Archives Canada

Previous Members:

- Hélène Charbonneau, Bibliothèque et Archives nationales du Québec

- Suzanne Dubeau, York University