BLACK METROPOLIS RESEARCH CONSORTIUM

THE COLOR CURTAIN PROCESSING PROJECT

PROCESSING MANUAL

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I. The Color Curtain Project: Unveiling Archives of Chicago's Black Metropolis

The Council on Library and Information Resources (CLIR) has awarded a twenty-eight month "Hidden Collections" grant in the amount of $499,500 to the Black Metropolis Research Consortium (BMRC) for our "Color Curtain" Processing Project: Unveiling the Archives of Chicago's Black Metropolis".

The generosity of CLIR will enable the BMRC to process over 100 collections of its members' holdings related to African American History, create EAD finding aids, and formally introduce undergraduate students into the archival profession.

The Color Curtain Project: Unveiling Archives of Chicago's Black Metropolis represents an effort to access the history of people of African descent in Chicago through the sum of primary resources in the areas of dance, literature, religion, medicine, anthropology, the origins of Rhythm and Blues music, and the birth of the Black Metropolis. Scholars of African American history have long suspected that researchers have not consistently recognized importance of records created by Black Chicago in the role of the Harlem Renaissance and other black arts movements. By processing uncataloged materials, the Color Curtain Project will also correct some of the prevailing gaps and biases about Black History in Chicago.

Through this award, the BMRC seeks to expand intellectual control and arrangement of unprocessed collections discovered during our Andrew W. Mellon funded three-year (2009-2011) BMRC Survey Initiative. We will go beyond surveying by arranging & cataloging primary resources related to Chicago's African American heritage. As this work is completed, a further objective of the "Color Curtain Project " is to structure a comprehensive recruitment tool for the archival profession. Undergraduate students seeking careers in history and archival science will gain experience working in special collections repositories while processing African American related collections.

II. MORE PRODUCT LESS PROCESS (MPLP)

Mark Greene and Dennis Meissner introduced the concept of minimal processing in their article, "More Product, Less Process," to provide an alternative to item level processing for 20th century collections. Minimal processing is designed to reduce archival backlogs created by accruals and the time intensive nature of traditional processing. The primary goal when using MPLP is to make collections accessible to researchers, even if they are not perfectly processed.

The key to minimal processing is to take advantage of information that is already available.
- Look at what is written on the boxes and how folders are labeled. You can learn a lot from folder titles.
- You will also be provided with processing plans and packets. Use this information to your advantage.
- While working, remember that the goal is to provide access, try not to get overly absorbed in the collection!
- For the purpose of this project, collection arrangement will take place at the series and possibly subseries level; description will take place at the series/subseries level and sometimes at the folder level.
- Work efficiently and take good notes so that you do not have to return to reinvestigate topics.

Remember to trust your instincts and the capabilities of future researchers.

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A. MPLP Guidelines

Situation	Recommendations
Non archival box	Transfer contents and label information to archival box.
Box too heavy to lift	Subdivide into two or more boxes, if possible.
Non archival folder	If folder is damaged or doesn't fit in a document box, transfer contents and label to archival folder without any additional work to contents. If folder is overstuffed, divide into two and note on new folders that contents were originally in one folder. (To label a continuation of folders you can use 1:2 and 2:2). Otherwise, keep as is.
Volumes	Place one or more volumes in standard box if they will fit and be adequately supported, especially if volumes are damaged or have soft covers. Keep clearly related volumes together if possible. If the repository stores volumes directly onto shelf, make brief tabs for each volume, including collection name or number, volume type, and dates. Any volumes with detached covers and/or spines should be tied with book tape.
Unfoldered bundle of papers	For each bundle: untie and put into one folder without sorting or other work on contents. If folder is overstuffed, divide into two. If bundle is labeled or brief description can be quickly gleaned, label folder accordingly. Otherwise, look at records and make the best guess possible based on a brief examination.
Pile of loose papers (in box or on shelf)	Group papers and place in folders, keeping groups of adjacent, related materials together if possible. If brief description can be quickly gleaned (e.g. prevailing recipient, approx. date range), label folder accordingly. Otherwise, look at records and make the best guess possible based on a brief examination.
Volume needs repair	Flag for local staff and note in Preservation worksheet.
Cased photos, glass negatives or slides	Flag for local staff and note in Preservation worksheet.
Mold, possible nitrate film	Notify local staff immediately and follow their procedures for isolating or note in Preservation worksheet.
Live bugs	Notify local staff immediately and follow their procedures for isolating.
Obvious large cache of duplicates	This type of duplication is usually only found in 20th century institutional or corporate materials. Discuss with local staff, and remove in accordance with local staff instruction.
Three-ring binder	Do not remove pages. Only transfer to folder(s) if binder is damaged.
Artifacts	Flag for local staff
Audio-visual materials	Identify formats if possible

Step 1.
KNOW YOUR COLLECTION

A. Processing Packet

Each processing team will be given a cursory "Processing Plan" for each collection. The Processing Plan will provide you with guidelines and important information that will help guide you through processing a collection. Be sure to spend time reviewing the plan immediately before you begin working on a collection and let Lisa know if you have any questions **BEFORE** you begin to work on a collection.

Processing Plans will include:

Survey Data

Accession information gathered from institution

Biography/History Note

Rough date range

Restriction or condition issues notes

Probable series arrangement

Any additional processing standards unique to the institution

Proposed processing plan

B. Collection Review

Work at this stage should be completed quickly. Even so, you can glean considerable information about the content and condition of the collection, which is essential for final processing. If necessary, revise the Processing Plan at this point. Don't assume you'll remember everything; **take notes** and flag material for future reference.

1. Review the information about the collection:
    *   *Processing Plan:* contains vital information regarding the structure of the collection as well as possible arrangement.
    *   *BMRC Survey*: data contains an overview description of the collection, highlights the perceived strengths and weaknesses of information, flags any potential condition or restriction issues, identifies subject headings and types of material (a/v, photograph, etc.).
2. Conduct an inventory of the collection and verify you have accounted for all the material.
    *   Count the boxes.
    *   Identify unfoldered/unboxed material.
    *   If shelved separately, bring entire collection together.
3. Begin to identify or confirm series or other preliminary organizing principles, as laid out in the Processing Plan. Discuss possible revisions of the initial plan with Lisa. At this point, you may need to study folder content to identify types of material. DO NOT GET CARRIED AWAY! The Processing Plan is a guide, as the processors of a collection you will have a better understanding of how to best organize a collection but be reasonable and aware of your time limits.
4. As you begin to identify subjects or types of materials, place markers or pieces of paper with the identifying information at the beginning and end of each of the groups of material. Doing so will make it easier to find the material again.

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C. Supporting Documentation

Processing Plan Elements

The Processing Plan includes:
1. An institution overview
2. BMRC Survey record, which includes:
   - Approximation of size
   - Estimate of date span
   - Surveyors note that includes strengths and weaknesses of the collection
   - A list of the types of materials found in the collection.
   - Restriction or condition issues notes
   - Biography/History Note
3. An outline of likely series and subseries arrangement(s), pointing out merits and limitations of options, as appropriate. Final arrangement decisions, especially for subseries, however, usually are determined in the course of processing, as the papers are more carefully examined.
4. A reasonably detailed summary of the work that will be required to complete the processing and arrangement of the papers. This helps us gauge complexity, time, and options for using student and clerical assistants effectively.
5. An estimate of the time required to complete all work on the collection. In some cases, a preliminary processing calendar may also be included.
6. A list of archival supply needs.
7. Identification of material that may be a candidate for future digitization.
8. A statement outlining special storage needs/problems (e.g., framed art work, folio or broadside shelving, Art Storage/Object Storage)

Example of Collection Processing Plan

Collection Name:

Collection Date:

Collection Number:

Location(s):

Extent (pre-processing):

Linear feet (containers):

Desired Level of Processing:

Restrictions from Donors:

Custodial History (if known):

Separated Materials:

Related Materials:

Preservation Concerns:

Languages other than English:

Existing Order:

Does the collection need to be reboxed?

Does the collection need to be refoldered?

Supplies needed:

Potential Series:

Notes to Processors:
From the Survey:

Anticipated Time for Processing:

Survey Estimate for processing: hours per foot/ hours total

Processing Plan time:

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Step 2.
COLLECTION ARRANGEMENT

A. Intellectual Arrangement
REMEMBER, we are after speed! **The processor should avoid attempts at perfection**. Series should be broad, easily recognizable and not focused on individual folders/items. As a general rule, series are arranged in descending order of importance. If you are arranging a collection, the most important/unique series is placed first and the least important/unique last.

Original Order
Original order refers to the way the creator organized and used their records. Original order should always be used over rearranging a collection. **ONLY** rearrange a collection if there is no original order or the existing order is not conducive to research.

Series and Subseries
Series constitute the intellectual "groupings" of archival material around which the collection is sorted, arranged and described. The subseries category provides a way to further organize material within a series and is used to promote better access for large or complex collections.
- All material within a series or of a like kind should be placed together in the box(es).
- Begin by processing the most important or revealing series, organize this section into its appropriate order, resist the urge to refining series and subseries. If appropriate, sort into new archival folders; otherwise use original folders.
- Don't spend any time identifying individual items. Tackle the problematic pieces once the series organization and subseries arrangement as a whole have been achieved. In the meantime, segregate a problematic item or make a "best guess" and tentatively file it in the collection, flagged for follow-up review and consultation with Lisa or the repository archivist.
- Continue to take notes on the subject content of the collection, significant and key personages, subjects documented that may be of historical interest, obvious gaps in the documentation as well as its strong points, and other noteworthy details about the collection. Your notes will provide the substance for the biographical sketch and collection description in the finding aid later on.

Series Categories
Although collections, especially those from the 20th century, vary greatly in size and composition, there are certain constants in the kinds of information they include. In considering how to organize them, bear in mind the following broad categories:
- Personal and Biographical: information about the person giving context and background to his/her life.
- Correspondence: all interpersonal communications including any enclosures or attachments such as photos, etc.
- Creations: works created by the person in any format. This may include writings for historians, journalists, novelists, etc.; compositions for musicians; technical drawings for architects and engineers.

- Research: material collected or recorded by the person to support his/her creations, such as subject files or field notes. Research material is not always significant or substantial enough to retain.
- Photographs: should be treated as a series if they are received in association only with other photographs. Photographs that are associated with other papers should remain with that material.
- Subgroups of documents about other persons or organizations: examples might be club work or items inherited from the person's parents. This material will not always be retained.
- Audiovisual material: including films, tapes, CDs, DVDs, etc. These may be incorporated into other categories or may be treated as a separate series.
- Digital files: also may be part of other series but will require separate storage.

Not all Series are created equal.
It is plausible when working with large collections that you will come across unique and important series that warrant folder level processing while others may only need a series level processing.

> EXAMPLE: Unique documents pertaining to early African American settlers in Chicago will warrant folder level processing. Framed certificates, awards and plaques do not.

B. Physical Arrangement
The processing level the collection has been assigned and the intellectual arrangement will directly reflect the physical arrangement of a collection. Again, pay attention to original order, if original order exists, this makes your job easier. Arrange the material in boxes so that it corresponds with your intellectual arrangement.
Example: Material that comprise of "Series One" will be the first box in your physical arrangement schema.

DO
- Remove rubber bands, they are evil!
- Rebox and refolder when necessary.
- Only use pencil (everything an archivist does should be reversible).

DO NOT
- Organize material within folders.
- Unfold papers within folders.
- Remove papers clips or other metal fasteners unless absolutely necessary.

NEVER
- Throw anything away without permission from staff. Leave the material in the collection UNLESS staff tells you to throw it away. Make a note of the quantity and type of material discarded in your notes.

C. Foldering and Boxing

Basics of Foldering:
- Include no more material than can be safely handled by a researcher without disturbing the original order of the folder (i.e., 1" or less, depending on type of material).
- Never fill a folder so full that the sides bulge out.
- Square the bottom of the folder along the built-in crease lines so that the edge will stand flat in the box.

Basics of Boxing:
- Each container should be full enough to prevent materials from falling down or curling in the box, but not so tightly packed that it becomes difficult to remove or to replace the folders, or to thumb through them.
- Never pack a box to the extent that it causes the front panel to bulge out.
- Until final box labels are printed, label the end of the box in pencil or with an attached flag, with at least the name of the collection and of the series and some type of identifying note as to the contents (e.g., Correspondence, A-L).

D. Folder Titles and Labels

Titles

Remember that finding aids are designed to make collections accessible: think about being the user of the collection and how you would want to search.
- When possible, you will be transcribing existing folder titles into the container list. Only worry about improving titles if they are not at all helpful to researchers or are inaccurate. Enhance titles with dates and with additional information when it is easily available.
- Writing good titles is extremely important especially when minimally processing. The title will help a researcher decide if a collection contains information that makes a collection worth their time, and sometimes travel.
- Pay attention to your wording and be as accurate as possible.
  - Example: folder label **"Meeting regarding Coal Mining in Scranton, PA, 1995"**.
  - Is this a meeting about coal mined in Scranton, PA?
  - OR
  - Is it a meeting about coal mining, generally, which was held in Scranton, PA?

DO NOT
- Use abbreviations in folder titles. Few are standardized and part of this project's purpose is to create finding aids for a centralized, standardized EAD repository.
- Use acronyms in folder titles. With the advent of electronic finding aids, researchers may jump to a portion of the finding aid without reading all notes and miss your explanation.
- Use "Miscellaneous" in folder titles. Instead, write a description that includes at least a list of the types of materials included therein. At least: Financial materials, 1987-2004.

Folder Numbers
- Folder numbers refer to the number of folders in a collection.
- **Do not** number folders until processing is completed and you have permission from Lisa.

<u>Folder Labels</u>
- If reusing folders select clean and obvious location.
- Make sure you are aware if the institution utilizes an internal format before begin labeling. If they do not have a standard they use consistently, please use the suggested format:
  - Left side of tab:
    - o Collection title
  - Center of tab:
    - o Series name, Date range
  - Right side of tab:
    - o Box #, Folder # of # (**Do not** fill in numbers at this time.)

Ned Flanders papers	Correspondence, 1945-1990	Box 2, Folder 1 of 80

E. Sensitive Materials

The variant interpretations of what constitutes "sensitive" and the archivists' professional code of ethics necessitate guidelines to shape a common sense approach to sensitive materials that favors access over restriction. MPLP processing does not allow for time to diligently comb through the collection to identify sensitive documents. If you do come across material that you think is sensitive don't be afraid to ask. Make sure to record sensitive information in your processing notes, in Archivist Toolkit, and in the finding aid.

If you do restrict material, use the following statement:

"Some materials in this [collection/series/subseries/folder title(s)] are restricted. Please contact [the holding repository's name] for more information."

E. Supporting Documentation

<u>Processing Levels Guidelines</u>

Level	Title	Intellectual Arrangement/ Description	Physical Arrangement	Preservation
1	Collection Level	Collection level record (title, date span, extent, abstract). No action taken other than the creation of the collection level record. Include Authority headings only if easily ascertained. Use inventory as container list, if one exists.	As is	Rehouse only if unserviceable in current housing. Check for mold, pests, and nitrate film.
2	Series Level	Collection level record and finding aid with series/subseries list. Described at the series/subseries level with information about their location in boxes. Box level container list available with series level description. Authority headings included where easily ascertained.	Bring series material together, with no effort organize folders further.	Replace damaged boxes; house loose items, damaged or unboxed volumes. Check for mold, pests, and nitrate film.
3	Folder Level	Collection level record and finding aid with folder list. Material arranged in series/subseries order; folders are organized with no effort to sort material within folders. Folder level container list available.	Put folders or volumes in order within boxes. DO NOT order material within folders.	All unbound material should be in archival boxes in order to complete series arrangement. Replace damaged boxes/ folders. Check for mold, pests and nitrate film.

Arrangement Examples

Collection Level Arrangement:

Bio/Hist Note:
The Back of the Yards Neighborhood Council (BYNC) was located on Chicago's Southwest side near the former Union Stockyards that housed Chicago's meatpacking plants. Saul Alinsky and Joseph Meegan founded the BYNC in 1939 making it the oldest community organization in the United States. Its 185 delegate organizations including residents, social clubs, churches, schools, as well as business owners sought to improve the difficult living conditions endured by workers in Chicago's meatpacking industry.

Scope Note:
This Collection consists of annual reports for the BYNC, correspondence between Alinsky and Meegan, and some cursory documentation about the various delegate organizations.

Series Level Arrangement:

Bio/Hist Note:
The Back of the Yards Neighborhood Council (BYNC) was located on Chicago's Southwest side near the former Union Stockyards that housed Chicago's meatpacking plants. Saul Alinsky and Joseph Meegan founded the BYNC in 1939 making it the oldest community organization in the United States. Its 185 delegate organizations including residents, social clubs, churches, schools, as well as business owners sought to improve the difficult living conditions endured by workers in Chicago's meatpacking industry.

Scope Note:
This collection includes correspondence between Saul Alinsky and Joseph Meegan regarding the founding of the BYNC and some material regarding the delegate organizations during the last ten years of the BYNC (1954-1964). The collection is organized chronologically within three series; "Correspondence, 1939"; "Delegate Organizations, 1954-1964."
Container List:
Series 1: Correspondence, 1939
Series description
          Box 1
Series 2: Delegate Organizations, 1954-1964
Series/subseries description
Subseries A: Churches
          Box 1-3
Subseries B: Businesses
          Box 4

Folder Level Arrangement:
Bio/Hist Note: The Back of the Yards Neighborhood Council (BYNC) was located on Chicago's Southwest side near the former Union Stockyards that housed Chicago's meatpacking plants. Saul Alinsky and Joseph Meegan founded the BYNC in 1939 making it the oldest community

organization in the United States. Its 185 delegate organizations including residents, social clubs, churches, schools, as well as business owners sought to improve the difficult living conditions endured by workers in Chicago's meatpacking industry.

Scope Note:
This collection includes correspondence between Saul Alinsky and Joseph Meegan regarding the founding of the BYNC and some material regarding the delegate organizations during the last ten years of the BYNC (1954-1964). The collection is organized chronologically within two series; "Correspondence, 1939"; "Delegate Organizations, 1954-1964."

Series 1: Correspondence, 1939
Description of Series

Box	Folder		
1	1	Saul Alinsky	1939
	2	Joseph Meegan	1939
	3-4	American Commonwealth Federation	1942

Series 2: Delegate Organizations, 1954-1964
Description of Series and subseries
Subseries A: Churches

	5	Folder title	1954-1957
2	6	Folder title	1955
	7-8	Folder title	1963-1964
	9	Folder title	1964

Subseries B: Businesses

3	5-15	Folder title	1954-1957
	16	Folder title	1955
4	17-28	Folder title	1963-1964
	29	Folder title	1964

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Step 3.
COLLECTION DESCRIPTION

The primary purpose of the collection description is to provide an overview of the entire collection and to bring particular strengths or weaknesses of the collection to the attention of researchers and staff. The description of the papers is not intended to be an exercise in individualized creative writing. Rather, it should be a concise and informative delivery of key information about the contents of an archive.

A. Biographical/Historical Note

A biographical note is about the person(s), either creator or subject, of the collection. A historical note is about an institution or business, either creator or subject of the collection. Sometimes, the creator may be a collector and then the bio/historical note will focus on the content of the collection, or what the creator collected, with only as much information about the creator as is necessary to further understanding of the collection. The bio/hist note should cover the general history of the person or business, but the focus should be on the aspect of the person, institution or business that is reflected in the collection.
Include the following:

- Name(s): This may include titles, married names, aliases, pseudonyms, common or popular names and acronyms (if an institution or business) and name changes.
- Geographic Location(s): Birthplace, place of business, etc.
- Birth/Death Dates OR Business Operation Dates: This is almost always different from the collection dates as the collection may document only a fraction of a person's life or a business's operation.
- Historical Significance: How do they fit into the general context of history? What the person, institution or company is known for, or why the person, institution or company is important?
- Relationships: Should only be recorded if it directly relates to the content of the collection. Parentage, marriage, business partners, etc. important to further historical context and understanding.

B. Scope and Content Note

The scope note refers to the contents of the collection. It is here specific attributes of a collection are addressed; collection highlights, obvious gaps in records, or unique perspectives on the topic of the collection.

- The introductory paragraph should include a general summary of the scope and content of the collection, including span and bulk dates, and an iteration of the basic series and subseries organization of the material. (The intro paragraph will be the basis for the Abstract)
- In describing the contents of a collection terminology similar to that found in the Library of Congress Subject Headings should be used to provide a link between the cataloging of the papers and the papers themselves.

<u>Every scope note should include:</u>

1. Mention of unique materials or type material that makes up bulk of the collection. Resist listing ALL types of material – focus on highlighting what provides best or most historical context.
2. Main Subjects (use your best judgment).
3. Every series title and subseries titles (where applicable) and explanation of how the collection is arranged. Ex. "This series is arranged chronologically." Or "This series is roughly organized by material type."
4. Dates spans of the records, dates of events, or extremely important time frames within the creator's life or business's operations.
5. Functions or activities resulting in the creation of the records.

C. Container List

The container list is as it sounds, a list of material found in the collection. The container lists should reflect the processing level. The series description should be placed directly below the series title within the container list. Each paragraph introducing a new series should begin with the series name, span of dates, and subseries present (if any) and emphasize major features found in the series. **If the arrangement is self-evident and additional information is not required**, the container list begins immediately beneath the title. Refer to institutional preference regarding formatting of the list.

D. Abstract

The abstract is a brief statement that summarizes the collection. It includes the most basic and important information from the bio/history and the scope note and is useful for providing researchers with the most essential facts about the collection. Institutions will use the abstract to describe material in their online catalog, or MARC record. You should be able to describe the collection in just a few sentences.

E. Supporting Documentation

<u>Biographical/Historical Note Cheat Sheet</u>

You will be given a preliminary biographical note. You may enhance it using information you find in the collection or supporting documentation. Be sure to answer as many of the following questions as is possible. You do not necessarily need to write your note in the order of these questions.

Who
Who is the collection about?
Did their name change at any point in their life?
Who was their family?
Are other significant people in the collection? What is their relationship to creator/subject?

What
What did the person do for a living?
What are significant accomplishments or achievements of the person and their dates?

When
When was the person born?
When did they die?
What are significant timeframes/dates within the person's lifetime?

Where
Where was this person born?
Where were they educated (institution, degree, dates)?
Where did they live?
Where did they conduct their business?
Did they travel/explore?
Did they die?

Why
Why is this person/business historically significant?
Why should people use this collection? Why is this collection unique?

Scope and Content Note Cheat Sheet

Your scope note should be a narrative description of the contents of the collection. When writing your scope note, be sure to answer as many of the following questions as is possible. You do not necessarily need to write your note in the order of these questions. Remember to think about the collection from the researcher's point of view.

What kinds of materials are in the collection? If one type of material/or topic makes up the bulk of the collection, make note of that.

What are the main subjects contained within the collection?

How is the collection organized?

What is the date range of the collection?

Are there gaps in the collection?

What are the highlights or specific strengths of the collection?   If there is anything that pops out at you for future digitization projects, note it here!

Are their unique perspectives on topics within the collection?

How does the collection fit within the more general context of history?

How will this collection be useful to researchers?

Does the collection tell a full story or only part of story? Or, does it fill in gaps of a larger story?

Does it inform any unexpected or not immediately apparent topics?

Is it a first stop for researchers or a last stop, etc.?

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Scope and Content Note Formatting

EXAMPLES of how to format a scope note

1. Describe the contents of the collection broadly. Include the main types of materials present, the main subjects covered in the collection, as well as date ranges. If one topic/subject represents the bulk of the collection, that should be noted too.

    EXAMPLE: The John Smith papers, dating from 1900 to 1945, consist of correspondence and diaries in the early 20th century, the culture of trade in Chicago and Smith's interactions with his customers.

    This can and should be expanded upon as the collection demands

2. Following the broad description of the entire collection, note the number of series and their titles. Always use quotes around the name of the series.

    EXAMPLE: Smith's papers are arranged into two series: "Correspondence, 1900-1945" and "Diaries, 1900-1933, 1938."

3. Describe how the collection fits within the general context of history and how this collection will be useful to researchers. As the processor of the collection, you are the authority of the contents and will be the most able to speak to the usefulness of the collection.

    EXAMPLE: This collection is unique in that it describes a African American worker's interactions with trade societies and customers in early 20th century Chicago. Researchers interested in the textile industry in Chicago, tailors in Chicago, and trade societies will find this collection a valuable resource.

4. Within the container list, describe each series briefly, mentioning date ranges, series highlights, gaps in the records, series arrangement and unique perspectives on topics within the series.

    EXAMPLE 1: "Correspondence" includes letters to and from John Smith. The bulk of this correspondence is to Smith, received from 1900 to 1935. This series is arranged chronologically.

    EXAMPLE 2: Within the "Diaries" series are six volumes describing Smith's day-to-day life. These record his family life, business, his social engagements, and his involvement in trade societies. This series is arranged chronologically.

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<u>Container List Example</u>

Series I. Correspondence, 1825-1955
"Correspondence," is organized into two subseries, "General Correspondence" and "Family Correspondence." Each subseries is arranged alphabetically. Letters from correspondents not listed individually may be found in the "general" folders in each subseries.

Subseries A: General Correspondence, 1865, 1923-1954
Additional description if necessary.

Box	Folder		
1	1	"A" general	1923-1932
	2	Abrams, Harry N.	1943-1944
	3-4	American Commonwealth Federation	1942
	5	"B" general	1937-1939
	6	Bacon, Leonard Woolsey (1830-1907)	1865
	7	Bacon, Leonard Woolsey (1865-1939)	1921-1922
	8-9	Bank of New York and Trust Company	1923-1950, undated
	10	Berberova, Nina Nikolaevna	May 15, no year
	11	Black, Matthew Wilson	1946-1954

Subseries B: Family Correspondence, 1825-1955
Additional description if necessary.

Box	Folder		
	12	Brewer, Arthur (son)	1921
2	13	Bogradus, Harriet (cousin)	1946
	14	Mason, Henry	Dec 14, [1831?]
	15	Matthews, Dr. ----	1833-34
	16	Maypole, ----	1825-27
	17	Mitchell, Burroughs	1894-1927
	18	Unidentified	1953, 1955

Series II. Photographs, 1950-1970, undated
The photographs are arranged alphabetically. Mostly photographs are unidentified and undated.

Box	Folder		
	19	Family portraits	1950-1970
	20	Picture of Spot, the family dog	Undated

*Set the table borders at "None"

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<u>Abstract Cheat Sheet</u>

The abstract is a brief and tidy statement that sums up the collection in a few sentences. It provides researchers with the most essential facts about the collection. The easiest way to write the abstract is to take the first paragraph from the bio/historical note and the first paragraph from the scope and content note, combine them, and then tweak your text.

Who is the collection about?

What are the dates of the creator/subject?

What is the significant contribution of the creator/subject?

What is in the collection?

What are the dates of the collection?

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Finding Aid Guidelines

Document Formatting:
- Font Cambria, size 12
- Single space
- Page numbers, including first page, bottom right of document
- Use Chicago Manual Style
- DO NOT USE PAGE BREAKS

Formatting for Bio/Scope Notes:
- Paragraph break only between paragraphs and between sections
- Do not indent new paragraphs
- DO NOT USE PAGE BREAKS
- Series titles should use Roman numerals; subseries Arabic numerals

Formatting Container List:
- Box/Folder title at top of each series
- Table and cell borders should be set at "none"
- Cells should not contain paragraph breaks or "extra space." The table below is formatted correctly.

The template below has all the required settings, please use it!

Institution:
Collection Title:
Date Span:
Extent:
Processors: Processed by CLIR funded Black Metropolis Research Consortium "Color Curtain Processing Project." By YOUR NAME(S) HERE. DATE.
Restrictions:
Related Collections:

Abstract:

Biographical/Historical Note:
Cited Sources:
Only include if the Bio/Hist note information was pulled from places other than the collection material.

Scope and Content Note:

Access Headings:

Container List:

Box	Folder	Title	Date

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Step 4.
COLLECTION REVIEW

A. Description Review
- Make sure that your biographical/historical and scope and contents note reflect the contents of the collection.
- Look for folder titles that do not make sense (if they don't make sense to you, they certainly won't make sense to a researcher).
- Look for inconsistencies. Do not vary certain terminology throughout the finding aid. Example, either account book or ledger but not both; keep punctuation consistent, etc.
- If you have questions about the collection at the end of reading the finding aid, return to the collection and answer them ONLY when your unanswered questions compromise the effectiveness of the finding aid.
- Look for mistakes in numbering in the series/subseries.
- Count the number of folders in each box and make certain it matches your finding aid.

B. Collection Review
- Make certain that all the most important information included in those documents is included in your notes.
- Check to see if the date ranges are still correct: the surveyors did not have the opportunity to look at the collection as closely as you did.
- Have you reduced or increased the size of the collection through processing? If you did, check to see that the correct extent is reflected on the finding aid.
- Check to see if there are any names, subjects or genres that should be added to or removed from the authority list. If there are, email Bergis/Lisa and they will add them.

C. Edit Work
- Check for spelling and grammatical errors.
- Make sure the changes you made are reflected in the new finding aid.
- Make certain that you did not create new misspellings if made changes to the finding aid.

STEP 5.
COMPLETING THE PROCESS

A. Finalize the Finding Aid

Your finding aids will go through three rounds of revision:

- Peer review: Once you have completed the finding aid (or your specific contributions to the finding aid) have your teammate read and critique your work. Make any necessary changes.
- Review by Lisa: Once you have completed peer review, email it to Lisa for editing. Make any requested changes.
- Home repository review and approval: After you have completed the requested changes, email the finding aid back to Lisa. If the finding aid meets her approval, she will submit the final version to the repository staff for approval.

B. Archivist Toolkit

To be determined.

C. Box Labels

- ONLY after the home repository approves the finding aid will box labels be made.
- Create box labels, following the standards or preference of the repository. If the repository does not have a standard or preference, be sure to include the following information:
    - Accession/collection number
    - Full collection title
    - Box number (1 through however many are in collection)
- The text on the label should be centered and formatting should be consistent throughout.
- Labels should be placed on boxes consistently throughout collection; check if institution has a preference for where labels are placed on the box.

D. Processing Worksheets

You must complete the following worksheets for every collection you process. Please put some time and thought into the content of the worksheets. Together, the worksheets enable us to track our progress, track the successes and failures of minimal processing, and to provide useful collection related information to repositories.

- Processing Worksheet
- Exhibit/Digitization Worksheet
- Preservation Worksheet

E. Blog Post

Contributing to our blog is a requirement of your job. Our goal to have one blog post per student for every institution we process. Feel free to get creative or even critical, but remember that you are writing this as an agent of the BMRC. Keep it professional and mostly positive (or at least diplomatic) when discussing collections and repositories. You may be more candid about the project and your experience using MPLP. Blog posts may be written during work hours, but keep your processing schedule in mind. Blog posts should be submitted to Bergis.

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F. Clean Up
- Clean up your work station and return all tools/supplies
- Return all documentation to Lisa
- Meet with project staff to discuss workflow

LOOK AT THE CHECKLISTS IN YOUR PROCESSING PACKET. BEFORE YOU CONSIDER YOURSELF FINISHED WITH A COLLECTION, MAKE CERTAIN THAT YOU HAVE COMPLETED ALL NECESSARY TASKS.

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G. Supporting Documentation

<u>Processing Worksheet</u>

Repository: Repository Name   **Processors:** Your Name
Collection: Collection Title
Extent pre processing: # linear feet   **Extent post processing:** # linear feet
Hours for Processing: # hours

Existing Descriptive Documents:
What documents did you consult before processing?

Did original order exist at the start of processing?
Yes or No and what (if any) type of arrangement did the collection begin with?
[EXAMPLE: Yes, while series levels were not defined, they clearly existed and required only a little rearrangement in order to achieve intellectual control.]

Minimal Processing Notes:
What was in the collection and how did you rationalize your arrangement schema?
[EXAMPLE: This collection contained one box of loose documents: however, they were separated into obvious categories and therefore, could easily be foldered and placed in an appropriate order. Little reading of the documents was required to create good titles and supply dates. The materials were typed and therefore, interpreting handwriting was not necessary. In addition, the size of the collection was reduced by one linear foot because the documents, once placed in folders, fit into other existing boxes.]

Description Notes:
What descriptive information did you have to begin with and what additional documentation did you utilize to write the final Scope and Bio/Hist Notes?
[EXAMPLE: The scope and content note and the biography note, created by the survey team, were less developed than normal and I worked for about 1 hour on creating sufficient descriptive information. The existing folder titles were usable and I created the folder list very quickly.]

Level of Processing at End of Work: Processing Level #

Processing Times and Activities
Record your daily activities while processing. This documentation will help us to calculate actual processing time against our original estimate.
EXAMPLE:
Day 1: 9a-12p and 1p-3p: Familiarized myself with collection (.5 hour), determined series levels (.5 hour), arranged the collection (.5 hour) and started the folder list in the Archivists' Toolkit (4.5 hours)
Day 2: 9a-12p: Finished the folder list (1 hour), developed the scope and content and bio notes (2 hours) and proofread and made box labels (1 hour).

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Exhibit/Digitization Worksheet

Repository:

Collection:

Were there any items in this collection that would be good candidates for digitization or public exhibit?
(Either for informational value or for visual impact?)

Box	Folder	Item	Value

Comments:

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Preservation Worksheet

Repository:
Collection:

Items to flag:

___Damaged Volumes   ___Damaged Manuscripts   ___Photocopying

___Fragile Photographs   ___Possible Nitrate Film   ___Mold

___Live Bugs or Pests   ___Artifacts   ___Dirt

___Audio-Visual Material   ___Electronic Data (floppy disks,   ___Other:
                                                CD-ROMs, etc)

Notes:

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Sensitive Materials Guidelines

The guidelines address information that is protected directly by federal laws, such as FERPA and HIPAA, and less directly, as when a cause of action under common law for invasion of privacy may arise if facts concerning an individual's private life are published that would be deemed highly offensive to a reasonable person.

Category	Item	Restriction Comment
Student Records	Report Cards	SSN: restrict if person is still alive and SSN is recorded.
	Transcripts	SSN: restrict if person is still alive and SSN is recorded.
	Papers with grades	If donor or donor's family: no restriction necessary. If NOT donor or donor's family consider restricting.
	Tests with grades	If donor or donor's family: no restriction necessary. If NOT donor or donor's family consider restricting.
	Letters of recommendation	No restriction necessary.
	Miscellaneous student records/materials	SSN: restrict if person is still alive and SSN is recorded. Restrictions may be necessary if material identifies 3rd party individuals and includes evaluation of any kind; the records need not be official institutional records governed by FERPA to warrant a privacy restriction.
Peer Review Journal Records	Journal correspondence and writings.	If donor's own work, no restriction.
Peer Review Grant Records	Grant proposals	If donor's own work, no restriction.
Financial Material	Salary information	No restriction necessary.
	Charitable giving/potential	No restriction necessary.
	Banking, investments, insurance	No restriction necessary.
	Income tax records	SSN: restrict if person is still alive and SSN is recorded.
Medical/Health Related Materials	Medical bills	SSN: restrict if person is still alive and SSN is recorded.
	Health Insurance correspondence	SSN: restrict if person is still alive and SSN is recorded. If

		person represented is still alive, consider restriction for conditions relating to mental or reproductive health.
	Medical correspondence	SSN: restrict if person is still alive and SSN is recorded. If person represented is still alive, consider restriction for conditions relating to mental or reproductive health.
	Physician journals	If end date is more than 70 years old, then no restriction is necessary. Restriction necessary if end date is less than 70 years and individual patients and ailments are identified.
	Patient files	Restrict.
Legal Material	Court materials	Public records: no restriction necessary.
	Legal case files	If donor's personal case file(s), no restriction necessary. If donor's family personal case file(s), consult with archivist. If lawyer's case files, restrict.
Business Materials	Business administrative files	Restrict at donor's request only.
	Pay stubs	SSN: restrict if person is still alive and SSN is recorded.
	Job applications	SSN: restrict if person is still alive and SSN is recorded.
	Resumes	No restriction necessary.
	Employee records	SSN: restrict if person is still alive and SSN is recorded.
	Grievance files	Restrict.
Other Sensitive Content	Sexual activity	If content is explicit AND 3rd parties are identified consult with archivist.
	Sexual identity	If 3rd parties are identified consult with archivist.
	Drug use	If content is explicit AND 3rd parties are identified consult with archivist.
	Mental health concerns	If donor, family or 3rd party,

		consult with archivist.
	Reproductive health concerns	If donor, family or 3rd party, consult with archivist.
	Marital discord	If donor, family or 3rd party, consult with archivist.

DACS RULES

Name segment (Collection Title)

2.3.4 Record the name(s) of the person(s), family, or corporate body predominately responsible for the creation, assembly, accumulation, and/or maintenance of the materials.

> Bacot family papers
> Wisconsin Environmental Policy Act records
> Emerson Street YMCA collection

2.3.18 Where the materials being described consist of three or more forms of documents created, assembled, and/or maintained and used by a government agency or private organization such as a business or club, supply the word "**records**" for the nature of the archival unit. Where the materials being described consist of three or more forms of documents created, assembled, and/or maintained and used by a person or family, supply the word "**papers.**" When describing an intentionally assembled collection, supply the word "**collection**" to indicate the nature of the unit being described. This rule is only applied to the highest level of the archival unit being described (the collection title).

There are no rules for folder titles/elements – use your best judgment

Dates Element

Record dates of creation, record-keeping activity, publication, or broadcast as appropriate to the materials being described.

Inclusive Dates:

2.4.7 Record the earliest and latest dates of material in question.

> 1849-1851

2.4.8 If further accruals are expected record the inclusive dates pertaining to the current holdings.

> 1979-2011
> NOT 1979-   OR   1979-(ongoing)

Predominate or Bulk Dates:

2.4.10 Where the dates pertaining to the majority of the documents differ significantly from the inclusive dates provide bulk dates.

> 1809-2010, bulk 1950-2010

2.4.11 If there is a significant gap in the chronological sequence of the documents, record the anomalous date(s) separated by commas. Explain significant gaps in Scope and Content Note.

> 1827, 1952-1978
> 1975, 2007

Estimated Date Range:

2.4.12 At all levels of description, where the earliest or latest dates are estimated, indicate in a clear and consistent fashion.

> circa 1870-1879

Single Dates

2.4.13 If the material falls within a single year, record the date or a more specific date therein.

> 1975
> 1975 March-August

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VIII. Glossary of Terms

The following definitions are taken from:
A Glossary of Archival and Records Terminology by Richard Pearce-Moses
http://archivists.org/glossary/index.asp

Abstract: n. ~ A concise summary of the key points of a larger work, often used to assist the reader in determining if that work is likely to be of use.

Access: n. ~ 1. The ability to locate relevant information through the use of catalogs, indexes, finding aids, or other tools. – 2. The permission to locate and retrieve information for use (consultation or reference) within legally established restrictions of privacy, confidentiality, and security clearance.

Archival Records: n. ~ Materials created or received by a person, family, or organization, public or private, in the conduct of their affairs that are preserved because of the enduring value contained in the information they contain or as evidence of the functions and responsibilities of their creator. ('Archival records' connotes documents rather than artifacts or published materials, although collections of archival records may contain artifacts and books. Archival records may be in any format, including text on paper or in electronic formats, photographs, motion pictures, videos, sound recordings. The phrase archival records is sometimes used as an expanded form of archives to distinguish the holdings from the program.)

Archives: (also archive), n. ~ 1. Materials created or received by a person, family, or organization, public or private, in the conduct of their affairs and preserved because of the enduring value contained in the information they contain or as evidence of the functions and responsibilities of their creator, especially those materials maintained using the principles of provenance, original order, and collective control; permanent records. – 2. The division within an organization responsible for maintaining the organization's records of enduring value. – 3. An organization that collects the records of individuals, families, or other organizations; a collecting archives. – 4. The professional discipline of administering such collections and organizations. – 5. The building (or portion thereof) housing archival collections. – 6. A published collection of scholarly papers, especially as a periodical.

Arrangement: n. ~ 1. The process of organizing materials with respect to their provenance and original order, to protect their context and to achieve physical or intellectual control over the materials. – 2. The organization and sequence of items within a collection.

Artificial Collection: n. ~ A collection of materials with different provenance assembled and organized to facilitate its management or use.

Authority Control: n. ~ Description · The process of establishing the preferred form of a heading, such as proper name or subject, for use in a catalog, and ensuring that all catalog records use such headings.

Backlog: n. ~ 1. Materials received by a repository, but not yet processed.

Best Practices: n. ~ Procedures and guidelines that are widely accepted because experience and research has demonstrated that they are optimal and efficient means to produce a desired result.

Biographical Note: n. ~ That part of a catalog record or finding aid that places the materials in context by providing basic information about the materials' creator or author. (For individuals, the biographical note may include date and place of birth, full and variant forms of the name,

occupations, significant accomplishments, places of residence and work, family members, and date and place of death.)

Collection: n. ~ 1. A group of materials with some unifying characteristic. – 2. Materials assembled by a person, organization, or repository from a variety of sources; an artificial collection. – collections, pl. ~ 3. The holdings of a repository.

Controlled Vocabulary: n. ~ A limited set of terms and phrases used as headings in indexes and as access points in catalogs.

Corporate Records: n. ~ Documents and other materials created or received by an incorporated commercial enterprise in the course of operations and preserved for future use. (Also: Business Records)

Cubic Foot: n. ~ 1. A volume of space that is approximately 12 × 12 × 12 inches. – 2. Records · A measure used to indicate the quantity of materials, commonly used to describe the size of large collections. (Because the surface of a standard file folder (10 × 12 inches) is roughly a square foot, a linear foot of files is roughly a cubic foot. A records center box, which measures approximately 10 × 12 × 16 inches, is generally counted as a cubic foot, even though it is slightly larger.)

Custodial History: n. ~ Records · The succession of offices, families, or persons who held materials from the moment they were created.

Describing Archives: A Contents Standard: n. (DACS, abbr.) ~ A standard for creating access tools for all forms of archival materials, including their archival creators and the forms of creator names.

Description: n. ~ 1. The process of creating a finding aid or other access tools that allow individuals to browse a surrogate of the collection to facilitate access and that improve security by creating a record of the collection and by minimizing the amount of handling of the original materials. – 2. Records management · A written account of the physical characteristics, informational content, and functional purpose of a records series or system.

Document Box: n. ~ A container that holds folders containing paper documents vertically and that measures roughly 10 inches high, 12 or 15 inches wide, and 6 or 3 inches deep, and that usually has an integral top hinged at the upper back. (Sometimes called a Hollinger Box. Document boxes made from high-quality materials suitable for long-term storage of archival materials are often called archives boxes.)

Document Case: n. ~ A shallow container that is used to store documents in a flat position and that has an integral top that is hinged on a bottom side.

Encoded Archival Description: n. (**EAD,** abbr.) ~ A standard used to mark up (encode) finding aids that reflects the hierarchical nature of archival collections and that provides a structure for describing the whole of a collection, as well as its components.

Extent: n. ~ Cataloging · A description of the physical quantity of the material described.

Family Papers: n. ~ Records created or collected by a group of individuals who are closely related by ancestry and relating to their personal and private affairs.

File: n. ~ 1. A group of documents related by use or topic, typically housed in a folder (or a group of folders for a large file). – 2. plural (files) · The whole of a collection of records.

Finding Aid: n. ~ 1. A tool that facilitates discovery of information within a collection of records. – 2. A description of records that gives the repository physical and intellectual control over the materials and that assists users to gain access to and understand the materials. (Finding aid[1] includes a wide range of formats, including card indexes, calendars, guides, inventories, shelf

and container lists, and registers. – Finding aid[2] is a single document that places the materials in context by consolidating information about the collection, such as acquisition and processing; provenance, including administrative history or biographical note; scope of the collection, including size, subjects, media; organization and arrangement; and an inventory of the series and the folders.)

Flat File: n. ~ 1. Container or shelf used to store documents and planar materials in a horizontal position, parallel to the shelf. – 2. Containers designed to hold documents unfolded.

Folder List: n. ~ That part of a completed finding aid or a rudimentary finding aid that lists the folder titles in a collection. (A folder list makes it possible to browse the contents of the collection without having to physically access the materials. Some folder lists may also include information about the series and about the span dates of the contents in each folder.)

Fonds: n. ~ The entire body of records of an organization, family, or individual that have been created and accumulated as the result of an organic process reflecting the functions of the creator.

Historical Value: n. ~ 1. The usefulness or significance of records for understanding the past. – 2. The importance or usefulness of records that justifies their continued preservation because of the enduring administrative, legal, fiscal, or evidential information they contain; archival value.

Inclusive Dates: (also span dates), n. ~ Description · The dates of the oldest and most recent items in a collection, series, or folder

Informational Value: (also reference value and research value), n. ~ The usefulness or significance of materials based on their content, independent of any intrinsic or evidential value.

Institutional Memory: n. ~ The information held in employees' personal recollections and experiences that provides an understanding of the history and culture of an organization, especially the stories that explain the reasons behind certain decisions or procedures.

Intellectual Control: n. ~ The creation of tools such as catalogs, finding aids, or other guides that enable researchers to locate relevant materials relevant to their interests.

Intrinsic Value: n. ~ The usefulness or significance of an item derived from its physical or associational qualities, inherent in its original form and generally independent of its content, that are integral to its material nature and would be lost in reproduction. (Intrinsic value is independent of informational or evidential value. A record may have great intrinsic value without significant informational or evidential value; records with significant informational or evidential value may have little intrinsic value.)

Level of Description: n. ~ 1. The amount of detail or number of elements in a formal description of a work. – 2. The amount of detail in a collection included in a finding aid or catalog record, as determined by the number of hierarchical levels.

Levels of Arrangement: n. ~ The hierarchical, intellectual, and physical divisions used in archives management, including repository, record group, fonds, collection, subgroups, series, subseries, file, and item.

Linear Foot: n. ~ A measure of shelf space necessary to store documents. (A linear foot measures twelve inches for documents stored on edge, or twelve inches high for documents stored horizontally. For letter size documents, it is slightly less than a cubic foot. The number of leaves within a linear foot varies with the thickness of the material.)

Manuscript: n. (ms, abbr.) ~ 1. A handwritten document. – 2. An unpublished document. – 3. An author's draft of a book, article, or other work submitted for publication.

Manuscript Collection: n. ~ A collection of personal or family papers.

MARC: (also USMARC, MARC 21), n. ~ A data communications format that specifies a data structure for bibliographic description, authority, classification, community information, and holdings data. (An acronym for MAchine Readable Cataloging. MARC is a United States implementation of the Information Interchange Format (ANSI Z39.2). Other countries implemented that standard with minor variations. The variations included UKMARC, and CanMARC. Efforts to harmonize the variations to create a single standard are reflected by the use of the name MARC 21.)

Metadata: n. ~ A characterization or description documenting the identification, management, nature, use, or location of information resources (data).(Metadata is commonly defined as "data about data." In terms of archives, MARC format and EAD are standards for structuring descriptive metadata about collections. Dublin Core is a standard for structuring metadata that is intended for describing web resources.)

Multi-Level Description: n. ~ Description · A finding aid or other access tool that consists of separate, interrelated descriptions of the whole and its parts, reflecting the hierarchy of the materials being described. (Multilevel description proceeds from the general to the specific. Each level contains information relevant only to that level. Descriptions of a subordinate part does not repeat information in a description of its parent, with the exception of information necessary to link the part to its parent.)

Name Authority File: n. (NAF, abbr.) ~ A compilation of authority records that describe the preferred forms of names used as headings in a catalog, along with cross-references from variant forms of the name.

Original Order: (also registry principle, respect for original order, *l'ordre primitif*, *respect de l'ordre intérieur*), n. ~ The organization and sequence of records established by the creator of the records. (Original order is a fundamental principle of archives. Maintaining records in original order serves two purposes. First, it preserves existing relationships and evidential significance that can be inferred from the context of the records. Second, it exploits the record creator's mechanisms to access the records, saving the archives the work of creating new access tools. Original order is not the same as the order in which materials were received. Items that were clearly misfiled may be refiled in their proper location. A collection may not have meaningful order if the creator stored items in a haphazard fashion. In such instances, archivists often impose order on the materials to facilitate arrangement and description. The principle of respect for original order does not extend to respect for original chaos.)

Papers: n. ~ 1. A collection. – 2. A collection of personal or family documents; personal papers. (Papers[1] is used generically to encompass materials in a variety of formats, including manuscripts, typescripts, clippings, photographs. 'Papers' connotes materials in sheets. It is sometimes used in the title of a collection, even though that collection includes bound works such as scrapbooks or diaries, and may even contain even three-dimensional artifacts. – Papers[2] can be equally as encompassing in format but connotes materials associated with an individual or family, apart from official records of a business or organization.)

Personal Papers: also personal records, private papers), n. ~ 1. Documents created, acquired, or received by an individual in the course of his or her affairs and preserved in their original order (if such order exists). – 2. Nonofficial documents kept by an individual at a place of work.

Physical Control: n. ~ The function of tracking the storage of records to ensure that they can be located.

Primary Source: n. ~ Material that contains firsthand accounts of events and that was created contemporaneous to those events or later recalled by an eyewitness.

Processing: n. ~ 1. The arrangement, description, and housing of archival materials for storage and use by patrons.

Provenance: n. (provenancial, adj.) ~ 1. The origin or source of something. – 2. Information regarding the origins, custody, and ownership of an item or collection. (Provenance is a fundamental principle of archives, referring to the individual, family, or organization that created or received the items in a collection. The principle of provenance or the *respect des fonds* dictates that records of different origins (provenance) be kept separate to preserve their context)

Record Type: n. ~ 1. A distinctive class of records defined by their function or use. – 2. A class of records defined by their style, subject, physical characteristics, or form[2]. Examples of record types[1] include baptismal records, deeds, and accounting ledgers. – Examples of record types[2] include moving images, photographs, oral histories.

Records Center Box: n. ~ A corrugated cardboard box, approximately one cubic foot, designed to hold either legal or letter size files. (A records center box measures approximately 10 × 12 × 16 inches. It is tall enough to hold files vertically, long enough to hold legal folders parallel to the long side, and wide enough to hold letter files parallel to the short side. Frequently, the top is not attached to the body of the box.)

Register: n. ~ 1. A record containing entries in the form of a list. – 2. A volume recording names or events.

Repository: n. ~ A place where things can be stored and maintained; a storehouse. (any type of organization that holds documents, including business, institutional, and government archives, manuscript collections, libraries, museums, and historical societies, and in any form, including manuscripts, photographs, moving image and sound materials, and their electronic equivalents)

Reversibility: n. ~ Preservation · The ability to undo a treatment, returning the object to the condition it was in before treatment.

Scope and Content Notes: n. ~ Description · A narrative statement summarizing the characteristics of the described materials, the functions and activities that produced them, and the types of information contained therein.

Secondary Source: n. ~ 1. A work that is not based on direct observation of or evidence directly associated with the subject, but instead relies on sources of information. – 2. A work commenting on another work (primary sources), such as reviews, criticism, and commentaries.

Series: n. ~ 1. A group of similar records that are arranged according to a filing system and that are related as the result of being created, received, or used in the same activity; a file group; a record series.

Series Description: n. ~ A description of a series, including the title, scope and content note, size or volume, dates of the material, and arrangement.

Standard: n. ~ 1. A benchmark or reference used to measure some quality or practice. – 2. An international, national, or industry agreement that establishes qualities or practices in order to achieve common goals.

Subseries: n. ~ A body of documents within a series readily distinguished from the whole by filing arrangement, type, form, or content.

Union Catalog: n. ~ Descriptions of several repositories' holdings integrated into a single catalog.

User: n. ~ 1. An individual who uses the collections and services of a repository; a patron; a reader; a researcher; a searcher.

Vital Records: n. ~ 1. Records that document significant life events, including births, deaths, marriages, divorces, and public health matters; vital statistics. – 2. Emergency operation records immediately necessary to begin recovery of business after a disaster, as well as rights-and-interests records necessary to protect the assets, obligations, and resources of the organization, as well as its employees and customers or citizens; essential records.

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