

Chapter 2.4 Video Transcript: USING THE SPREADSHEET

Welcome to Chapter 2: Using the Spreadsheet. If you haven't already watched the two "What You Need to Know" videos, please watch those first before watching this one.

Once you start gathering material for your collection, you'll need to track the steps of taking in and organizing it all. In this video, we will introduce the spreadsheet that we used throughout the process of building our collection. We decided to use spreadsheets, because of their flexibility in how you can easily organize, sort, and re-sort your information. This is something you'll need to do with your collection frequently as you're organizing it.

As you see, there are different sections of the spreadsheet, divided into tabs that you find at the bottom. For now, we'll be looking at Tab 1: Receiving Donations.

Starting on the left in Tab 1: for each donation, start out by listing who the donor is and their contact information in **columns A, B, and C**.

Once your donor gives you their material, use **column D** to record when you receive their donation.

For your physical materials, it's a good idea to attach or write a label on the box or folder or bin that the materials are stored in, especially as more things start coming in and you have more and more materials to keep track of. Keeping the same label on all related material from a donor helps you know who donated what to you, in case you have questions further in the process. You're going to put the same label on any boxes or bins and any digital folder you need to create. We suggest you create a label with the donor's last name and the donation date, and enter that label in **Column E**.

These boxes, bins and folders are what we'll refer to as the donation's "**temporary storage**."

Once you receive material, you're going to take a first pass through the donation, the first of two passes through the materials that you'll do. The purpose of this first pass is to familiarize yourself with what's in the donation, make sure anything physical is in decent condition, and to ensure that you can open and read any and all digital files. As we go through Tab 1, we'll explain the steps of this first pass.

The second pass, that you'll do in Chapter 4, is for the purpose of getting the material into its permanent archival storage and getting it organized and labeled. We'll talk about this in greater detail in Chapter 4.

Column F in the spreadsheet says “Appraise physical items.” In general, this means going through anything physical that you’ve received to check what condition it’s in, and whether there’s any damage to it that requires any special care or preservation steps right away. Later in this process, you’ll be storing material in archival quality folders and boxes to help preserve it, but for now, in this first pass, you’re doing triage on anything that needs immediate care.

So, let’s start with a checklist of what you can do to appraise various kinds of physical items. (You can find this checklist in the Chapter 2 PDF.)

- Keep an eye out for anything that may feel like it’s treading on personal privacy. Pictures or video that might be embarrassing to someone else should be treated carefully and not made public.
- You may want to keep no more than three copies. It’s nice to have a master copy then have 1-2 other copies in case you ever want to physically display them. Then if anything happens to your display copies, you’ve still got the master copy.
- Check for tears, mold, or yellowing. If you see mold, it is best to remove that paper from your collection since mold will spread and contaminate everything it touches.
- Carefully remove any rusty paper clips or staples from any documents.
- Look for fragile documents. You can put cardstock or lightweight cardboard underneath the document for support, then enclose them in a plastic sleeve of some kind for protection.
- You want to store the papers so that they are upright or lying flat. What you want to avoid is storing papers so that they slouch or bend. A tip here is fill in empty space around file folders with bubble wrap or packing paper to help support them.
- Check for adhesive on the back of photos! You can store photos together in a folder, but only if there is no adhesive on the back or the front. If you do feel some adhesive, you can enclose photographs in a plastic sleeve of some kind to isolate the photo and protect the other photos around it.
- If you have loose slides, gather them together in a box or in a clean ziploc bag. You just want some kind of container that will protect them from dust, scratches, or fingerprints.
- Since newspaper causes other paper to yellow over time, pull out any newspaper that you’ve decided to keep and put it in a file folder, away from any other paper donations.

Remember that you can choose to get rid of the newspaper if you scan the material first and keep a digital copy.

- If there are any books or booklets that are folded open on their binding, close them in order to keep the binding intact. As with paper, store books or booklets either lying flat or upright-and-supported, so that they are not slouching or bending in any way.

Once you’ve done all your appraisal steps for your physical materials, check off this step in Column F.

Next, let’s continue the checklist with digital files.

In **Column G**, now you are going to appraise the digital donation. “Appraising” digital files involves a slightly different set of steps but still has to do with checking the condition of the donation.

So, for each digital file that you’ve received, make sure you can open the file and read it. Given the speed with which the digital world updates itself, you may find that older digital donations will be in formats which are now obsolete. If you can’t open a file, try searching for other applications that can open the document. If that works, convert the old format to a new format, and save the updated files.

If you still can’t open the file, you may need to talk to your donor to see if they can provide the file to you in a different format.

Once you’ve done all your appraisal steps for your digital materials, check off this step in Column G.

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The last part of the process of receiving and tracking a donation has to do with gathering written permissions from your donor to make their material publicly available as part of your collection. So, we’ll talk about these final steps in Columns H, I and J.

When you send the gift agreement out to your donor for them to sign, check off Column H. Once you’ve received it back from them, check off Column I.

Last but not least, we strongly recommend that you print a physical copy of your gift agreement and file it, and that you then also file a digital copy of your gift agreement. Why? Because this gift agreement is critical to your being able to share this material publicly, so creating back-up

copies in both physical and digital forms seems prudent. And because we're archivists, we feel safer with some redundancy; it's better to be prepared!

That said, you may decide to just keep digital copies, and if so, please make sure that you have multiple back-ups in different locations. Current best practice is to have at least three copies of a digital file, spread out between physical drives and the Cloud. In our experience, we chose to have one copy on a computer, one on a separate hard drive, and one in online Cloud storage.

Once you've filed your signed gift agreements, check off Column J.

And with that, you are done with your first pass through your donation! These steps have given you a chance to get more familiar with what's in a particular donation of material, to check on the condition of the materials you've received, and to ensure that you can open and read all the digital files.

Next, you're ready to go on to Chapter 3 and start with our introduction to Recording Conversations.