Chapter 4.3 Video Transcript
USING THE SPREADSHEET

In this chapter, we'll start entering information into Tab 3 of your spreadsheet. This tab is where the motherlode of information about your collection will live! There's a lot to talk about here, so we'll be paying attention to Columns A - G in this chapter, and we'll address the remaining columns in the next chapter. (If you haven't already watched the video "Organizing Your Collection," please watch that first before watching this video.)

Tab 3 is somewhat different in purpose from Tabs 1 and 2. Both of those tabs basically gave you a checklist of steps to follow for setting up your system for receiving donations, talking to potential donors of material, and then conducting and storing your interviews. Tab 3 is NOT a checklist of steps; instead, it's a place to gather all the searchable data that you'll provide for each of the items in your collection. We'll begin Tab 3 in this chapter and complete it in the next chapter as we talk through the various kinds of searchable information you might want to consider having. Then you can decide how much of this information you want to collect for your purposes.

And we want to emphasize that you can scale this up or scale it back, depending on your situation. We're giving you an example of a spreadsheet gathering the information that we think is important, but you may or may not need this much information. Within this spreadsheet, we've marked some of the columns as Essential–information that we think should be included, regardless of your situation; other columns as Recommended–information you might want to include to make searching easier in your collection; and other columns as Optional. The optional columns are ones that worked for us and our process but may or may not fit with how you put your collection together, so we just included them for illustration purposes.

So, let's take a look at Tab 3. We'll go through Columns A - G with several different examples: Example 1 is a photo of two Morris dancers, and for those who might know Ha'Penny Morris in Boston from 1989, you might recognize those two dancers! Because we received this photo in a digital format, even though it was probably a physical photo originally, we'll record it as a digital photo in our collection. Example 2 is a digitized version of a physical photo, showing Morris dancers dancing on the field around a maypole in Marlboro, VT. Example 3 is the 2004 poster for the Marlboro Morris Ale in Marlboro, VT. Example 4 is an interview with Natty Smith, a member of the Marlboro Morris Ale organizing committee for many years as well as a dancer and musician. And Example 5 is a Northwest Clog team's notebook of the dances they perform, an item that was not digitized.

In **Column A**, you'll enter the name of the donor of the item you're entering. Eventually, you will not need to associate the item with the person who donated it, but for now, we're tracking that information because you may have questions for that person as you enter information further in this tab.

In **Column B**, also listed as "recommended," note whether the item is coming to you in a digital format, or whether it's something physical. You want to note whether it's digital or physical at the time you received it, so even if you're planning to digitize a physical item later, list it here as "Physical". Similarly, if you've received a digital photo that you know was originally a physical photograph, list it as digital if that's how you received it.

Why do we care about noting this? Because it will be helpful as you're looking for items in your collection to know whether you're looking for a physical item or whether you're looking for a digital file.

Column C is optional; it's only relevant if you're choosing to assign ID numbers to items or folders. List the ID number that you are assigning to that item.

If you do create ID numbers, we strongly suggest that you keep a running list in Tab 4. In rare circumstances, you may want to change or drop an ID number. For instance, if you decide not to keep an item in your collection, then you could retire its number or make its number available for a future donated item. This list gives you a place to keep track of which numbers you've used, changed, or dropped.

We then decided that we wanted to track an additional step and that's what's shown in **Column D.** In Column C, we listed the number that was assigned to each item, but we then wanted to make sure we had labeled the item with the ID number. For digital files, we included the ID number in the file name, but for physical items, we needed to write the number in some unobtrusive place, or on a tag that we attached to the item. This column helped us keep track of whether we had done that yet.

In **Column E**, you're now going to create an Item Title so that's an essential piece of information. This can be fairly descriptive, because this is what you and the users of your collection will most often refer to. First, we have Sukey Krause and Deb Small dancing with Ha'Penny Morris. The next photo is one that we received physically but then digitized and we're calling it "Massed dancing around the maypole". We then had an Ale poster, and our very original title is "Ale Poster 2004". We've got the interview with Natty Smith. And the last one is "Team notebook of dance directions". So, those are the item titles.

In **Columns F and G**, both of which we recommend, we'll provide two different organizational labels that are each useful in different ways.

In **Column F**, you'll keep track of what the format of the item is. We labeled this as recommended because we found that being able to sort our collection by the type of item was something we needed to do often. We've created a drop-down list of what we anticipate will be the most common kinds of donations to a collection, but you are free to create your own drop-down menu here if you choose. We do recommend using a drop-down menu here for the sake of consistency in labeling things in your collection. So, this first photo belongs in our Photo-Born Digital format because we received it as a digital photo, even though it was probably originally a physical photo. The next one we received as a physical photo. The Ale poster is a Poster or Flyer. And then this is an Interview. And then the team notebook of dance directions consists of a bunch of Physical Documents.

In this chapter, you've also established what categories you're going to use to organize your items into. And **Column G** is where you'll keep track of those categories. For this example, I used the categories we chose for our Marlboro Morris Ale collection; however, you would use your own list of categories here that you've chosen for your collection. Our first photo of Sukey and Deb would belong in our Images category as would our next photo. The Ale poster belongs in Printed Materials. The interview belongs in its own category, and we decided the Team Notebook of Dance Directions belonged in our Related Materials category, since it was not specifically about the Ale.

So, here we have Columns A - G completed!

So, this begins the process of creating an inventory of your collection entered in this tab. In the next chapter, "Making Materials Searchable," we'll look at what you need to know about creating the searchable information for each numbered item in your collection, and you'll complete the remaining columns in this tab. You're now ready to start with the introduction to Chapter 5.