

# **CDSS Archiving Toolkit**

## **Chapter 5 Resources**

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## Chapter 5.1 Video Transcript

### Intro:

## MAKING YOUR COLLECTION SEARCHABLE

Both the previous chapter and this chapter are all about making things easy to find in your collection. This involves both having a collection that is well-organized and clearly labeled, and then making sure your collection is searchable by anyone using it. In the previous chapter, we addressed how to organize and label your collection, and how to store it both to preserve it and to make things easily findable. So now it's time to turn our attention to creating searchable data for each item.



As with the previous chapter, we will be drawing on guidelines that are used in library, archives, and museum work. We won't be outlining those guidelines in as much depth and detail as professionals would use, but enough to help you create a solid organizational structure for your materials. And again, if you have someone on your team who has that kind of knowledge and experience, they will be a great asset here!

There are two videos for you to work your way through: the first video—**What You Need to Know: Making Your Collection Searchable**—will provide you with some important background information on what searchable data we recommend you include, and why. Please watch this video first to inform your viewing of the second video.

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In the previous chapter, we asked you to start entering information in Tab 3 of the spreadsheet, and in this chapter, we'll complete the remaining columns in Tab 3. This tab is the storehouse of information about the material in your collection. The second video—**Using the Spreadsheet**—will walk you through those remaining columns.

So, let's begin!

## Chapter 5.2 Video Transcript

### What You Need to Know:

### MAKING YOUR COLLECTION SEARCHABLE

To make your collection searchable, you need to provide various pieces of information about all the items in your collection. But how do you know what information to include? In this video, we'll provide some guidance.

The key questions to think about are:

- Who will be using this collection?
- How will they want to search through the collection? (by person? by date? etc.)
- What will they want to be able to find?

To guide your thinking about what information to provide, think about what your community needs, then make finding what they need as easy as possible.

To start with, here are a couple of general guidelines:

- try to provide as much information as you can for anything in your collection, and
- to try to be as specific as you can (for instance, saying May 1993, instead of just 1993, or saying Marlboro, Vermont instead of just Vermont).

If you don't know a piece of information, it's more helpful to indicate what you do and don't know than to simply leave something blank. There are two alternatives to consider:

- If you don't know a date but can make even a rough estimate, that's more helpful than saying nothing at all. So, for example, it's more helpful to say "circa 1970-1985" or even "the late 1990's" than to just leave a date field blank.
- For other kinds of information, if you just have no idea, we suggest typing in "unknown" rather than leaving it blank so that any of your users know that this was not simply overlooked.

OK, so let's look at what information we'll ask you to provide when you start to fill in your spreadsheet.

One of the things we'll ask for is the name of the **creator**, and any **contributors**. A creator can be an author of something, a photographer, a videographer, an artist, a composer—anyone who is the primary creator of a particular item in your collection. If you include interviews in your collection, it's important to note that both the person being interviewed AND the interviewer are considered creators of the interview—both of them needed to be involved, so they share equal billing. A creator can be a person or an organization, and there can be

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multiple creators for something. Contributors are those people or organizations who also were responsible for bringing an item into being but are not the primary creator. You can think of them as the “supporting actors”. For example, contributors might include the illustrator of a book, the artist for a poster created by someone else, or a secondary author. If photos accompany a written document, then a photographer could in this case be a contributor. Or if a live interview is videoed by someone other than the person conducting the interview, then that videographer would be considered a contributor. “Contributor” here suggests a supporting role, but it’s a judgment call on your part to determine who is a creator and who is a contributor.

We’ll ask you to provide a **location** connected with the item if it makes sense to do so, and that’s your decision. Location is straightforward when you’re talking about photos or videos—it refers to the location of the subject of the photo or video. If it does make sense, but you’re uncertain of the location, we suggest you simply say “unknown”. And if it just doesn’t make sense, with something like a piece of clothing or a name button, we suggest you put N/A (Not Applicable).

A very important piece of information we’ll ask you to provide are **keywords** for the item. Two important guidelines that may be starting to sound a bit familiar are:

- when you can, it's better to be more specific than less specific; and
- have a prescribed lists of possible keywords if you can. It helps everyone creating and using this collection be consistent in their use of language and that makes things easier to find in your collection.

For example, this photo shows a group of dancers from the NY-City-based Morris dance team, Ring o' Bells. You could label this photo with the key word, "folk dancers," but a better choice would be the more specific "Morris dancers". You could get even more specific by labeling the photo "Cotswold Morris dancers".



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Here's another example: in the photo below, you could label the photo with the keyword, "Musicians," but an even better choice would be the more specific keyword phrase "Musicians for Morris Dancers".



You're aiming for consistency in how you present your searchable information, to make it as easy as possible to find things. So, in either case, having a prescribed list of keywords or keyword phrases can help those people labeling your items as well as anyone searching your collection to be able to find things more quickly. In Tab 5 of the Donations Spreadsheet template, we've provided a list of possible keywords that you can draw from; this template is provided in the online resources as its own document. You're welcome to add any other keywords that you feel are missing. Some people like to create drop-down lists in a spreadsheet with the choices; you can also just modify our reference list in Tab 5.

To maintain consistency, you can also choose to establish your own guidelines around keyword use. For example, you could specify that people's names are listed as "[Last name, first name]" and if they have a role on the team, such as founder / foreman / squire / treasurer / teacher or president – whatever terms you choose to provide—that follows the name. Or you might want to establish guidelines around labeling of photos or videos or documents—or any other parts of your collection. The trade-off to think about here is how much consistency and clarity you want to provide weighed against how much time you have to do this work. We found that, as we dug into all the cataloging work, our sense of how much information we felt we could provide evolved over time, and you may find the same is true for you.

When it comes to choosing keywords, if you have someone working with you who has library or archives experience, they may talk to you about the Library of Congress official search terms. The U.S. Library of Congress has created an extensive list of keywords and phrases and has established an "official" version of each to use as the search term. If you're interested in

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learning more about this widely-used system, we've included some information at the very end of this video.

We talked in prior videos about copyright and keeping track of who held the rights to anything in your collection. As you're completing your inventory in the spreadsheet in the next video, you'll need to provide a "rights statement" – indicating what people can do with this item—and list the rights holder—the person whose permission you need if you want to do something with the item in the collection. To help you come up with a rights statement, there is a wonderful website, [RightsStatements.org](https://RightsStatements.org), that provides a selection of 12 different rights statements “that can be used by cultural heritage institutions to communicate the copyright and re-use status of digital objects to the public”. Each statement applies to a slightly different situation, and you can tailor your rights statements to particular items, or you can choose a more general one to use across your whole collection as we did. For our Marlboro Morris Ale collection, we chose to use one of the rights statements for all our items. It reads:

*This Item is protected by copyright and/or related rights. You are free to use this Item in any way that is permitted by the copyright and related rights legislation that applies to your use. For other uses you need to obtain permission from the rights-holder(s).*

We recommend that you take a look at this website to see what rights statements best fit your situation.

You might recall from Chapter 2 that the “fair use doctrine” in U.S. copyright law says that it is permissible to use limited portions of a work without seeking permission if the purpose is commentary, criticism, news reporting, or educational purposes. If people want to use copyrighted material for purposes other than what is listed here, they need to seek permission from the rights holder, so you'll want to keep track of that information. For any written material, the author is often the default rights holder unless other arrangements have been made. For photos, slides or videos, it's the person behind the camera. For interviews, both the interviewer and the interviewee are joint copyright holders.

One of the tricky things here is that the rights holder is *not necessarily the person who donated the item to you!* Remember that in Chapter 2, we talked about the example of a person donating photos to you for which they are not the photographer or donating documents for which they are not the author. That's fine – they can certainly donate them. However, they just can't make any copyright-related decisions about what is done with the item they donated. Only the rights holder can make those kinds of decisions that fall outside of fair use purposes.

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There's one more guideline about rights that we'll mention here because it may be relevant for your situation: If a creator was paid to create something for an organization or a person, then that creation is considered a "work-for-hire" and the hiring organization or person owns the copyright. For example, an artist is hired to create a poster for the Western Michigan Folksong Society. If the artist is paid to create this poster by the Society, then the artist no longer owns the copyright to the poster – the Folksong Society does.

And finally, if you just aren't certain who the rights holder is for a particular item (and this is very common!), it's best to list "unknown" rather than to leave it blank.

As we said, there's a lot to understanding rights and rights holders, but we hope this provides you with some starting guidelines.

You're now ready to move to the next video in Chapter 5 – "Using the Spreadsheet". If you'd like to learn more about the Library of Congress search terms, you can watch the end of this video.

### Library of Congress Search Terms

The Library of Congress has created an extensive list of search terms and established an "official" version of each to use as the search term in order to create consistency across all the different situations where search terms are used.

So, for example, if you want to search for what official term to use for "folk dance," you would type in *folk dance* in the search bar and see that there are a number of choices. I can scroll down to see what seems the most appropriate, and I would probably choose folk dancing. The smaller words listed underneath it indicate other variations that people might use, but for those variations, you should use the preferred search term instead.

Looking down through the list, you can see that there are a lot of choices of types of folk dancing, and in fact, this goes on for many pages, I believe, down here. So, this is a good lead-in to our second general guideline about choosing search terms: "try to be as specific as you can". So, if you're considering *folk dancing*, think about whether you could say something more specific. If I try typing in *folk dancing English*, I see that there is a term for that, so I might choose to use that one in my list of different search terms. Getting more specific helps anyone using your collection to be able to narrow down what they're searching for.

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If I wanted to get even more specific, I could see if there's an official search term for *Morris dancing*. There are several choices that look appropriate—maybe *Morris Dances*, maybe *Morris Dance*. Any of these terms are links that provide more information to how the term is used in the Library of Congress. *Morris Dances* seems to suggest that it's a piece of music; I'm going to click on it to double-check that. And sure enough, it's saying "dance music," "Piano-4 hands" so that suggests this is more about a piece of sheet music. I'm going to try clicking on *Morris Dance* and the broader term that I see it connected to is *Folk dancing, English*, so that seems a better match, so I could include *Morris Dance* in my list of search terms.

If you like digging in and searching for yourself, you can hunt for your own search terms. However, to make this a little easier for you, we've dedicated Tab 5 in your spreadsheet to providing a list of Library of Congress search terms that we think may be useful. You are welcome to use these, or to look up your own online on the Library of Congress website; we've provided the link in the Resources document for this chapter, and we've also included this list of search terms that we provide in Tab 5, also in the Resources document.

You can also combine existing Library of Congress search terms to make something a bit more specific by creating what are called *compound terms*—basically, pairing together existing search terms to create something more descriptive for your purpose. For example, when we worked on our archival collection, we had a number of photos that featured Morris dance musicians, so we wanted to specify that. If you look at *Morris dance* in the list in Tab 5, you'll see that we specified *Morris dance—musicians* as one of our more specific search terms. Here's another example: Let's say you have a photo of Cotswold Morris dancers; you could certainly use *Cotswold Morris dance*, but you could be more specific saying *Cotswold Morris dance—folk dancers*. So, feel free to combine keywords or phrases to get more specific.

## Chapter 5.3 Video Transcript USING THE SPREADSHEET

We're now going to continue filling in Tab 3 in the spreadsheet. We've assigned two different colors to the remaining columns H - S to help distinguish between different sets of information. Columns H - P, in pink, are primarily pieces of information that we consider essential or recommended to include. Columns Q, R and S in blue, are optional pieces of information you may choose to include for photos, slides, or video.

We'll continue using the same five examples we used in the last chapter. Example 1 is a photo of two dancers from Ha'Penny Morris in Boston. Example 2 is a 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.

Starting in **Column H**, enter the date the item was created, if you know it. Remember that you can use "circa"-and-some-date if you can only provide an estimate, and using date ranges, even wide ones, is more useful here than nothing at all. However, if you just can't narrow it down, we suggest you say "unknown" rather than leave it blank to let people know that this column was not overlooked. For the first example, the photo of two Morris dancers, I know the photo was taken in 1989. For the next photo of the Morris dancing around the maypole, however, I don't know the exact year, but I do know that this kind of event took place in the early years of the Marlboro Ale, so I can say it was circa 1975-1980. The poster was created in 2004. In the case of Natty's interview, we know the exact date it took place so I can list 28 Nov 2023. The notebook of dance directions was created gradually over many years of the team's existence, so I'll list those years: 1991-2018.

In **Columns I and J**, again, essential, list the creator—if you know who it is—and any contributors to the creation of the item. We've added additional Recommended columns to list the interviewer and the interviewee separately, if you've done interviews. If you have other kinds of recorded conversations, you can list the folks who were involved as Creators.

For the photo of two Morris dancers, we unfortunately do not know who the photographer was, so I've put Unknown. The same is true for the next photo of the Morris dancing around the maypole. The Ale poster is a little trickier; it was the Marlboro Ale Committee who caused the poster to be created, so I listed them as the primary creator, but here I have a contributor as well—the artist for the poster. And unfortunately, for this poster, we do not know the name of the artist, so I entered Unknown for Contributor. For interviews, I listed the two interviewers and the one interviewee in **Columns K and L**. And finally, the creator for the notebook was a

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group effort by various members of the team, so I'll list the team as the Creator. And I've greyed out the cells that are not applicable here, just as personal preference to show where I don't need information.

In **Column M**, I listed locations if they're applicable. For the first photo, the location is unknown; however, in the second photo, we know that the dancers are in Marlboro, VT. Similarly, with the Ale poster, the location of the event described on the poster is Marlboro, VT as well as many of the surrounding towns, so I've listed southern Vermont as the location. For the interview, because we conducted the interview virtually, I would list both Natty's location as well as the locations of each of the interviewers. And for the notebook, a location did not seem applicable, so I put N/A.

In **Column N**, you'll be adding in any search terms that you want to apply to this item. Here, I'm trying to list a handful of terms that people could reasonably use to find this item. There's always a trade-off here in being thorough versus how much time you have to do this, because identifying search terms or keywords can easily become one of the most time-consuming parts of this process. And how many and which terms to include is all a judgement call on your part, as you consider that trade-off.

For the two photos, I just listed one compound search term: *Cotswold Morris dance–folk dancers*. For the poster, I've listed two terms: *advertising flyers* and *folk festivals*.

The interview again is the trickiest case, because the keywords relate to what was talked about in the interview. So, to keep yourself sane, and not to try to list every single thing that comes up in interviews or recorded conversations, look for broad headings of topics that get talked about in the interview for a substantial amount of time. If something just gets a quick mention, you don't need to create a search term for it.

So, for Natty's interview, I listed:

- *Morris dance*—because he talks about all different kinds of Morris dance with which he's been involved;
- *Morris dance–teenagers*—because he talks about his adolescent years as a significant time when he got more immersed in this type of dance;
- *Morris dance–musicians*—because he talks about being a Morris musician himself; and
- *Arts Administration*—because he talks quite a bit about his role on the Ale organizing committee over a number of years.

Finally, for the notebook, I listed one term: *Northwest Morris dance–instruction*.

Last of all, in **Columns O and P**, you'll list your chosen rights statement, and the name of the rights holder, if you know it. If not, you can put "unknown." For the Rights Statement, we chose

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to use a single statement as our default statement because we felt it was very clear and would apply to all circumstances. So, I've copied that for each example.

For both our photos, I don't know who the creator is, so I've put *Unknown* for the rights holder. For the poster, I've listed the creator—the Ale Committee. The interview was conducted for the specific purpose of being part of this collection, so our interviews were all signed over to the archival organization that is caring for the collection—in this case, Vermont Folklife—so they're listed as the rights holder here. And for the notebook, the creator was the team, but since the team has now disbanded, I've listed the Rights Holder as *Unknown*.

The next set of columns in blue, **Columns Q - S**, pertain only to images—either photographs, slides, or video. Only our first two rows are relevant here, so for those rows, I tried to fill in the team name, their home location, and who is in the photo. However, the 2nd photo has many teams and too many people to try to identify so I just grey out these cells.

So, there you have it—a list of basic searchable information to provide for the items in your collection. As you can see, this is by far the most time-consuming part of creating your collection. But it's also one of the most important, because without this information, users of your collection won't be able to search through it to find what they're looking for. You can certainly make your own decisions about how much of this information you want to capture for each of the items in your collection, depending on how much time you have, what you think people will want to be able to search by, and who will be taking care of your collection. (For example, if you want to give your collection to a formal archival institution, they may be interested in as much of this information as you can give them.)

Here's a final thought about making your collection searchable:

You may or may not want to include volunteers in helping populate this information. There are both advantages and disadvantages to doing this. On the one hand, you may be able to get a lot more done with more volunteers helping generate all this information about your collection. However, with more volunteers comes more opportunity for mistakes to be made, and inconsistencies to creep in. Remember we said that consistency is important in an archival collection. If you decide to use volunteers, just make sure you choose people that have a good eye for detail so that the information is entered correctly and consistently.

With that, congratulations! You are almost done, with only one final chapter remaining. You're now ready to move to the Introduction to Chapter 6, in which we'll talk about caring for your collection into the future, after it's been created.

## Chapter 5.2 Summary

### What You Need to Know:

### MAKING YOUR COLLECTION SEARCHABLE

#### Key Questions:

- Who will be using this collection?
- How will they want to search through the collection? (by person? by date? etc.)
- What will they want to be able to find?

#### General Guidelines:

- try to provide as much information as you can for anything in your collection, and
- to try to be as specific as you can (for instance, saying May 1993, instead of just 1993, or saying Marlboro, Vermont instead of just Vermont).

If you don't know a piece of information, it's more helpful to indicate what you do and don't know than to simply leave something blank. There are two alternatives to consider:

- If you don't know a date but can make even a rough estimate, that's more helpful than saying nothing at all. So, for example, it's more helpful to say "circa 1970-1985" or even "the late 1990's" than to just leave a date field blank.
- For other kinds of information, if you just have no idea, we suggest typing in "unknown" rather than leaving it blank so that any of your users know that this was not simply overlooked.

#### CREATOR:

- A creator can be an author of something, a photographer, a videographer, an artist, a composer—anyone who is the primary creator of a particular item in your collection.
- If you include interviews in your collection, it's important to note that both the person being interviewed *and* the interviewer are considered creators of the interview.
- Can be a person or an organization.
- There can be multiple creators.

#### CONTRIBUTORS:

- People or organizations who also were responsible for bringing an item into being but are not the primary "creator." You can think of them as the "supporting actors."
- Might include the illustrator of a book, the artist for a poster created by someone else, or a secondary author. If photos accompany a written document, then a photographer could in this case be a contributor. Or if a live interview is videoed by someone other

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than the person conducting the interview, then that videographer would be considered a contributor.

- It's a judgment call on your part to determine who is a creator and who is a contributor.

### LOCATION:

- Does it make sense, given the item, to provide a location?
- If it does make sense, but you're uncertain of the location, we suggest you simply say "unknown."
- And if it just doesn't make sense, with something like a piece of clothing or a name button, we suggest you put N/A (Not Applicable).

### KEYWORDS:

- When you can, it's better to be more specific than less specific; and
- Have a prescribed lists of possible keywords if you can. It helps everyone creating and using this collection be consistent in their use of language and that makes things easier to find in your collection.
- You're aiming for consistency in how you present your searchable information, to make it as easy as possible to find things.
- In Tab 5 of the Donations Spreadsheet template, there's a list of possible keywords that you can draw from; this template is provided in the online resources as its own document.
- You can also choose to establish your own guidelines around keyword use.
- Library of Congress Subject Headings are a professionally accepted set of keywords and phrases used by many libraries, museums and archives.

### RIGHTS STATEMENT & RIGHTS HOLDER:

- "Rights statement" indicates what people can do with an item in your collection.
- "Rights Holder" is the person whose permission you need if you want to do something with the item in the collection.
- Rights holders are typically creators....
- ...but are not necessarily the person who donated the item to you!
- Consider using RightsStatements.org, providing a selection of 12 different rights statements "that can be used by cultural heritage institutions to communicate the copyright and re-use status of digital objects to the public." Each statement applies to a slightly different situation, and you can tailor your rights statements to particular items, or you can choose a more general one to use across your whole collection.

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- We used:  
*This Item is protected by copyright and/or related rights. You are free to use this Item in any way that is permitted by the copyright and related rights legislation that applies to your use. For other uses you need to obtain permission from the rights-holder(s).*
- If a creator was paid to create something for an organization or a person, then that creation is considered a “work-for-hire” and typically, the hiring organization or person owns the copyright.
- And finally, if you just aren’t certain who the rights holder is for a particular item (and this is very common!), it’s best to list “unknown” rather than to leave it blank.

### Library of Congress Search Terms

<https://id.loc.gov/authorities/subjects.html>

The Library of Congress has created an extensive list of search terms and established an “official” version of each to use as the search term in order to create consistency across all the different situations where search terms are used.

Begin by typing in a word or phrase in the search bar. You'll get some entries to look through. The smaller words listed underneath each search term indicate other variations that people might use, but for those variations, you should use the preferred search term instead.

Don't forget to look through additional pages; you can click on new pages in the lower right of the screen.

Aim for being as specific and descriptive as you can.

Each search term is also a link that will take you to a page that provides more information about how the search term is defined within the Library of Congress. This may help you narrow down which one is most applicable for your purposes.

You can also combine existing Library of Congress search terms to make something a bit more specific by creating what are called *compound terms*--basically, pairing together existing search terms to create something more descriptive for your purpose. Feel free to combine keywords or phrases to get more specific.