L. Tom Perry Special Collections
Manuscripts & Archives Section

Agenda
Workflow Training and Walk-through
Monday 8, 2003, 9:00 to 10:00 a.m.
Presentation by Brad Westwood and Gordon Daines

Purpose: To introduce a revised workflow for all manuscript and archival collections, acquired and processed, by Special Collections. The workflow has six new steps:

1) Using a web-based Accession Log, launched in spring 2003;
2) Employing the latest finding aid template (for both preliminary and complete finding aids);
3) Employing EAD (Encoded Archival Description) for all finding aides (preliminary and complete);
4) Hook Concept -- selecting one item per collection to digitize (preliminary and complete);
5) Completing a meta-data sheet for each item selected for digitization; and
6) Web Management -- Curators are responsible for individual collection pages (HTML guides, “popular search topics,” “what’s new,” or new bibliographic data for the “guide” database.

Handouts: 1) Agenda, 2) manuscript checklist (located in the N: Drive/ Forms), 3) the finding-aid template (opens automatically when using X-Metal software), and 4) a meta-data sheet for “correspondence” (located in O Drive Special Collections)

Classroom Discussion: Old and New Workflow Concepts:

Workflow Techs: (the center of the manuscript universe) will audit, edit, document and shepherd all archival processes including cataloging, conservation work, digitization, micrographics, binding, URL linking, metadata transfer and web downloading.

Purchases: curators with the chair’s approves under $1000; the Board of Curators approves purchases between $1000-10,000 (w/ letter from library director) and the board, library director and academic vice-president approves purchases over $10,000.

Donations: the Board of Curators approves all collections over ten linear feet (with a “Board of Curator’s Review Process” form presented)

Accession Log: All manuscript accessions (donations, purchases, transfers, etc.) must be posted in this web database as soon as possible. See Nick Barrett and Phil Gosling for assistance at: (sc_webteam@byu.edu).

90 Day Audit Policy: All archival collections must be preliminarily processed within 90 days, this entails: a case file with a) a deed of gift, correspondence, board of curator forms, etc., b) an
attached manuscript checklist, c) completed a department record search (review the general catalog, all past accession logs, pertinent case files and the web based Location Register), d) completed catalog worksheet and e) preliminary box level inventory (in X-metal)

EAD Finding Aids: Create all finding aids using the software X-Metal (new XML EAD writer software). This software places encoded archival elements around and inside standard manuscript description. This will make all finding-aids “web ready” after the workflow process has been completed. Below is a web list of most archival repositories that have implemented EAD (Encoded Archival Description). With are adoption of this new web-publication technology, we will join a prominent group of national and international repositories. Our finding aids and digitized facsimiles will also be available on the Research Library Group’s Archival Resources (finding aids) and RLG Cultural Materials (digitized facsimiles)

http://lcweb.loc.gov/ead/eadsites.html

Hook Concept: Select one item from each collection for digitization. The item chosen must line-up with the applicable collection policy, stand alone physically and intellectually, yet reflect the collections general content and act as a “hook” to promote readers to pursue more archival research. After a trial period, the amount of digitization per collection (e.g. one letter to a series of correspondence, etc.) will be decided by the curator. We are doing the “hook concept” program one step at a time.

Metadata Sheets: In conjunction with the hook concept, each item select for digitization must have an accompanied metadata sheet partly filled out (other down the line will also fill in information). At this date, Kayla Wiley (Metadata Librarian) has created metadata sheets or standard templates for correspondence, diaries, photographs and reports. See the Manuscript Checklist for the location of these templates.

Editing: Because our products will be automatically available on-line, it is essential that curator take responsibility for editing and all workflow requirements. In addition, manuscript curators must actively participation in this process (offering training, contributing content and editing all catalog sheets and finding-aids); otherwise, the student processor(s) and the workflow staff will be identified as the author(s) and editor(s).

Walk-through Archival Workflow:

We will physically walk through the entire workflow processes

Associated Policies: -- Added after our Training Meeting

Subject Tracings: Subject tracings must conform to Library of Congress rules. Please consult with the manuscript cataloger to ensure that you are using authorized subject tracings in your finding aids and your catalog records.
Case Files: The case file will travel to two places—manuscript cataloging and digitizing. You may place the entire case file in a manila envelop if you are more comfortable with this. Label the envelope appropriately.

Registers: Registers will be available in two formats—a hard copy in the reading room and an electronic copy available via the Special Collections website.

Patron notification: Please remember to email the url of the electronic copy of the finding aid to the donor or send a hard copy of the finding aid to the donor.