

I'm going to talk about my basic strategy for processing a collection and walk you through some of the steps I take. Then I'll talk about a few of the little every day minutiae that are involved with processing and how I deal with those.

## Processing Experience

Reuther Library, practicum  
2 small collections

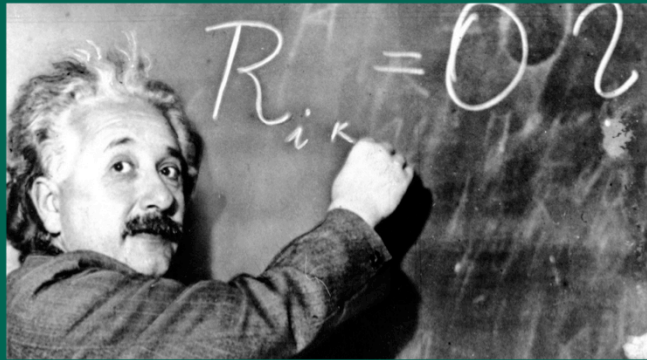
History Associates, Inc./National Park Service  
350 LF at two parks

Reuther Library, AFT Project Archivist  
1400 LF



Some of my processing experience: For HAI, I worked with one other person at both National Parks, we arranged 350 linear feet at the item or folder level, and this process took about 20 months. At the Reuther Library, I worked by myself and processed 1400 linear feet of American Federation of Teachers records in 18 months. It's amazing the difference some experience and MPLP will do!

## The Grad School Experience



Grad school can only prepare you for so much! Processing is a small part of archives, and as we all know, every institution/collection/archivist is different. You are expected to learn a lot on the job, which is fine, but I don't think we need to individually keep reinventing the wheel. I hope to make things a little easier by sharing my experience, and hope that others will share their experiences and offer their own tips as well.



Slide is self-explanatory.

## Romantic notions of surveying

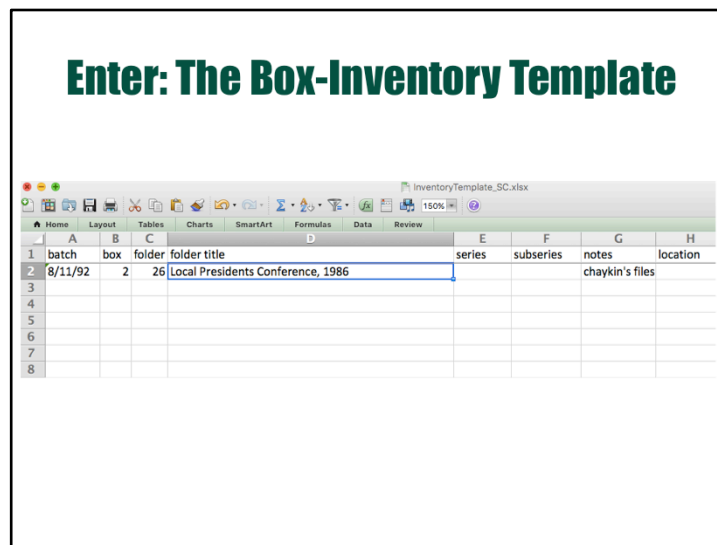


Collection surveys are usually described as a macro-level process – you get an overview of the collection and its creators, then form a processing plan. When I did this at my practicum with two very small collections, it worked out okay. But when I applied it to my first job where I had to process over 100LF, I found it to be almost completely useless. I gained only a superficial understanding of the records that did not guide me forward into the processing stage in any way.



Fortunately, a colleague at History Associates, Erica Williams, offered some tips. She used a spreadsheet for her survey to track everything from start to finish. It has completely changed the way I process collections.

## Enter: The Box-Inventory Template



The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H
1	batch	box	folder	folder title	series	subseries	notes	location
2	8/11/92	2	26	Local Presidents Conference, 1986			chaykin's files	
3								
4								
5								
6								
7								
8								

This is an example of what the template would look like. Not too complicated! I use it as I go through every box and every single folder, recording folder titles and other relevant information. In this version, I called the accession date a “batch” for some reason. This collection had multiple accessions so I used the date in order to keep them separate. Otherwise, I’d have 5 box #2s and would have no idea where anything actually was. As I go through the folders, I can indicate a series at this stage if I have ideas as I go, or just make notes in the notes field – for context/clarification, information about special formats, potential sensitive information, etc.

## Excel shortcuts

Auto-fill columns: click and pull down from bottom right corner of cell (use Option/Alt to toggle between copy or series)

Copy above cell: Command/Control + apostrophe



Excel shortcuts make the process a lot easier. There are probably more that I don't even know about.



	A	B	C	D	E	F	G	H	I	J	K
	batch	box	folder	new box	new folder	folder title	series	notes			
48	8/11/92	2	22	1		Legal Decisions	chaykin				
49	8/11/92	2	23	1		Local Presidents Conference, 1985	chaykin				
50	8/11/92	2	24	1		Local Presidents	chaykin				
51	8/11/92	2	25	1		Local Presidents Manual	chaykin				
52	8/11/92	2	26	1		Local Presidents Conference, 1986	chaykin				
53	8/11/92	2	27	1		Arbitration Seminar, 1986	chaykin				
54	8/11/92	2	28	1		Arbitration Seminar, 1986	chaykin				
55	8/11/92	2	29	1		Midwest Community College Conference	chaykin				
56	8/11/92	2	30	1		LDC Meetings, Colorado & Missouri	chaykin				
57	8/11/92	2	31	1		Midwest Region LDC Meeting	chaykin				
58	8/11/92	2	32	1		Midwest Regional Meeting, 1985	chaykin				
59	8/11/92	2	33	1		Mondale, Walter	chaykin				
60	8/11/92	2	34	1		Resumes	chaykin	weed (organizer resumes)			
61	8/11/92	2	35	1		NEA	chaykin				
62	8/11/92	2	36	1		NEA Now a Weekly Newsletter	chaykin				
63	8/11/92	2	37	1		Grievances Decisions, AFT Nat. Rep. (AFTSU)	chaykin				
64	8/11/92	2	38	1		National Rep Vacations	chaykin				
65	8/11/92	2	39	1		Regional Meetings of National Reps	chaykin				
66	8/11/92	2	40	1		Labor Institute of Public Affairs	chaykin				
67	8/11/92	2	41	1		Campaign Material	chaykin	org campaigns			

After I record everything, I arrange that first sheet into an approximation of “original order.” In this case, I sort by batch/accession date, then by box, then by folder number. (Be sure to include your folder numbers, otherwise Excel will somehow jumble them up). Then I have a record of the original order, at least as it arrived at the Reuther Library. If I am not arranging any folders, I can move on to completing the finding aid and labeling boxes! If not, I copy everything into a new sheet. The first sheet stays as a record for me to reference if necessary. The second sheet is where I play with arrangement. I “code the data” which means assigning a series name to each folder (as well as subseries, etc, if needed). I rarely arrange folders within a series or subseries, but if I do, I could add another column for that and add a date, subject, or simply alpha-arrange by folder title. Then I sort by series, (then subseries, sub-subseries, etc if necessary), then by batch number, box, and folder. Assuming I’m not arranging folders within series, this method places the boxes in an order such that I can go through one box at a time for each series, rather than going back and forth between boxes.

Once that sort is done, I have determined my intellectual arrangement.

When physically arranging, if I have multiple series I will copy each into its own sheet. This makes it easier to go back and forth between series as needed. Sometimes I encounter a folder that I assigned to the wrong series. It is

## Final Container List

	A	B	C	D	E
50		20	Regional Conferences Agendas, 1985-1986		
51		21	"Inside Your Schools"		
52		22	Legal Decisions		
53		23	Local Presidents Conference, 1985		
54		24	Local Presidents		
55		25	Local Presidents Manual		
56		26	Local Presidents Conference, 1986		
57		27	Arbitration Seminar, 1986		
58		28	Midwest Arbitration Class, 1986 February		
59		29	Midwest Community College Conference		
60		30	LDC Meetings, Colorado & Missouri		
61		31	Midwest Regional Meeting, 1985		
62		32	Mondale, Walter		
63		33	Ron Melton, Organizer		
64		34	NEA		
65		35	NEA Now a Weekly Newsletter		
66		36	Grievances Decisions, AFT Nat. Rep. (AFTSU)		
67		37	Regional Meetings of National Reps		
68		38	Labor Institute of Public Affairs		
69		39	Campaign Material		
70					
71	<b>Box 3</b>				
72		1	Missouri Correspondence, 1986-1987		
73		2	Missouri, 1985-1986		

This final sheet where I paste my final folder titles becomes my container list. I quality check it as I go through and number my folders. The final sheet can then be converted to a pdf and attached to the finding aid. You could also format it to include columns of EAD tags, or import it into a system you use for cataloging, or generating finding aids.



I hesitated to use this method at first, especially on very large collections. Going through every single box and recording every single folder is a time-consuming process. But I realized, a lot of what this method entails is stuff I'd end up doing anyway. In my experience, the time spent is well-worth it. Using this method has completely changed the way I process collections. It has made me much more efficient, and I have more control over the records as I'm processing them.

Next, I'd like to go over a few every day processing necessities. Some of these may be common sense, but I had to learn them on the job or as a volunteer, and I know others who didn't know them, so I think they are worth going over....

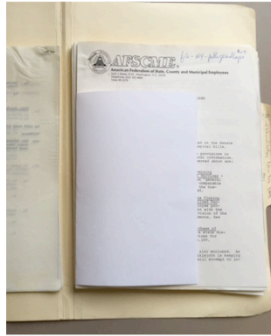
## **Fold the bottoms of your folders**



My first tip is to please fold the bottoms of your folders! Folders have score marks along the bottom for a reason. You should fold a folder according to the size needed for its contents. If you hold the folder upright, the edge of every paper should touch the bottom. If not, you have over-stuffed it. If you over-stuff or fail to fold, the papers will fold/bend/curl and this will become a preservation issue.

## Metal fastener replacement options

### Folded bond paper



### Plastic clips

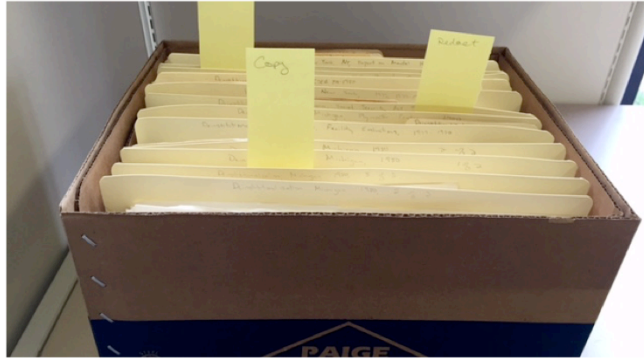


Chances are, you are not removing every staple or paper clip, but you will probably need to remove some (I removed an entire linear foot of binder clips from the AFT collections!). You have a lot of options for replacing metal fasteners. What you do probably comes down to personal or institutional preference.

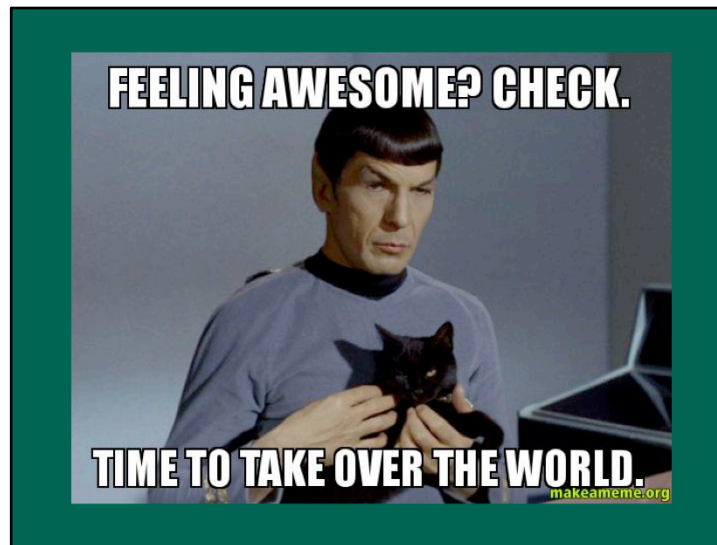
Folding a piece of archival bond paper around the documents is my personal preference, particularly when you have more than a few pieces of paper. This method is very gentle on the papers. I especially prefer to use it on delicate papers or with photographs. As a bonus, you can write notes on the paper which can be useful. All your options add bulk, but folded paper at least adds distributed bulk. Depending on how your researchers (or fellow archivists) handle the material, the documents could easily come out of the paper folded around them, or other items could wind up in them that don't belong.

Plastic clips are stable, - they won't stain the paper with rust. They are fairly secure, so paper is unlikely to slip out. However, the biggest problem I can see with these are using the wrong size. If you put a clip on too thick of a stack of papers, it is likely to pop off, leave a dent in the paper, or pages could slip out. They also tend to get caught on other papers.

## Paper flags



If you're like me, once you get into a task, you really don't want to stop to do something else. So when I'm processing and I encounter something that needs attention – sensitive info that needs to be redacted, newsprint or thermal paper that needs photocopying, etc., I place a paper flag so that it sticks up in the folder, and I note it in my spreadsheet. Later, when my brain is burned out from processing that day, I can take a break and go make photocopies for a while, or whatever else needs to be done. The paper flags are a nice visual reminder. The spreadsheet can become a little unwieldy if you have a very large collection and so it can be easy to miss such a note. The paper flags make finding the spot you need to go back to really easy.



As I said, some of the previously mentioned tips may be common sense, but they were not covered in grad school, at least not completely. I've encountered other archivists who also did not know this stuff. Learning on the job is fine and even necessary. But as we know, every processing experience will be different. You don't know when someone will encounter something and be able to learn it, or if they ever will. So I think its good to spread the word on these things, to help make all archivists better prepared to take on the world....or just processing. I welcome additional tips anyone else has and would like to share.

**Thanks!**

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Photos: <http://www.thehistoryblog.com/wp-content/uploads/2012/08/Tesla-at-work.jpg>  
<http://mashable.com/2014/11/12/theory-of-relativity-gps/#mFv59ahMgaqQ>  
<http://knowyourmeme.com/memes/i-have-no-idea-what-i-m-doing>  
Land Surveyor: <http://www.erikalmas.com/#portraits>  
<https://ellanzallamas.com/2014/12/21/keep-calm-and-curie-on/>  
<http://all-that-is-interesting.com/neil-degrasse-tyson-cooler>  
<https://makeameme.org/meme/Feeling-awesome-Check>