

Processing Survey Checklist

- Note all current locations of materials. Check shelf read for additional pieces of the collection and their locations.
- Check collection against any existing register for missing items.
- Identify old accession number(s) to be linked to collection or create new one(s).
- Create accession records for new accession(s) in ArchivesSpace (if applicable).
- Ask Acquisitions to create brief catalog record for new accession(s).
- If legacy material, confirm collection has been reappraised.
- Identify creator agent(s) for the collection.
- Identify items to be sent to Conservation.
- Decide if a re-box or re-folder is needed.
- Determine whether to keep existing folder titles if available.
- Recommend housing and final location (if applicable).
- Identify acidic newspaper clippings or mimeograph masters to be photocopied or digitized and the originals discarded or retained.
- Determine whether an XML inventory or other legacy inventory exists, and if it should be migrated
- Identify materials for weeding/deaccession, such as duplicates, photocopies, commercially available items, or out of collection/collecting scope, including audiovisual and computer media. Note all materials weeded in the processing plan.
- Identify physical AV/computer media carriers that should be discarded after digitization.
- Identify restrictions for part or all of collection, including high-value items for the Vault.
- Identify published materials for removal or to be cataloged and retained in the collection.
- Note arrangement level preference and provide further description recommendations if desired.
- Once AV spreadsheets are finalized, submit digitization requests over threshold to Reformatting.
- Identify other collections related to this collection significant enough to be noted in finding aid.
- Post-digitization of audiovisual and computer media: Note additional materials for weeding/deaccession, such as duplicates, commercially available items, or out of collection/collecting scope on the Processing Plan and move corresponding digital files into a "Delete" folder. Note materials that should be restricted based on post-digitization review.

Develop [processing plan](#) and create Basecamp using APS archival processing template. Provide description recommendations if desired or defer to the APS.