

Manuscripts Digital Prep 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.
- 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 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.
- Identify problematic/outdated language in existing titles or notes and provide feedback.
- Identify physical carriers/materials that should be discarded after digitization.
- If collection is unprocessed, state whether item or file-level processing description is preferred (with digitization in mind).
- Provide further description/arrangement recommendations, if desired, or defer to the APS, regardless of whether the collection is unprocessed, receiving an addition, or other scenarios.

- If not digitizing entire collection, identify exact materials that will be digitized, and the level of description (file or item only) for specified materials, including transcriptions (can mark up a copy of the finding aid).
- Identify duplicates, photocopies, and transcriptions, and decide whether digitization will replace the need for these materials (i.e. discard carriers).
- Develop [processing plan](#) with above information and create Basecamp using [Digitization Prep template](#).

Post processing and cataloging:

- Submit [digitization request](#) to Reformatting. See the Reformatting [guide](#) for more information.