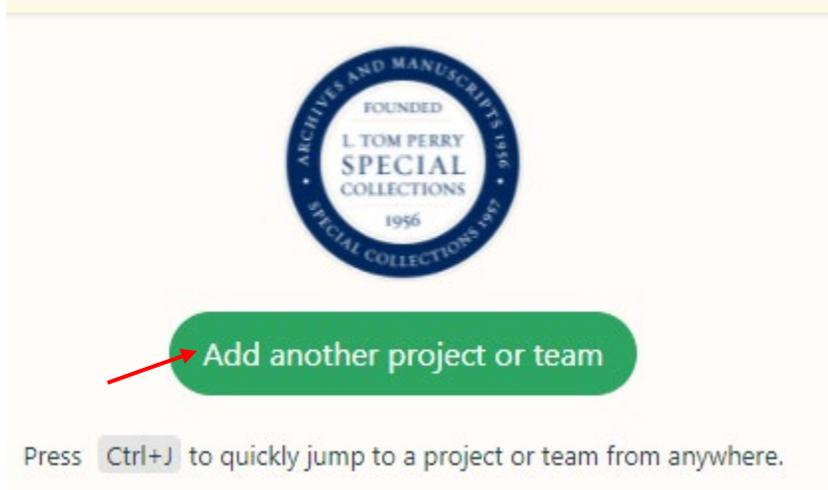
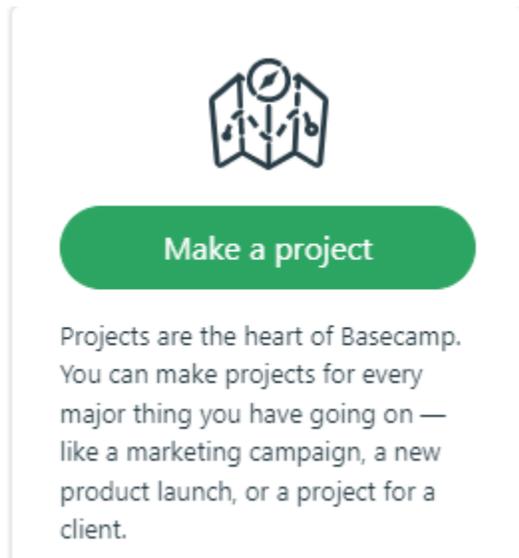


APS Processing

On home screen, click add another project or team:



Select Make a project:



Click on Use a project template...

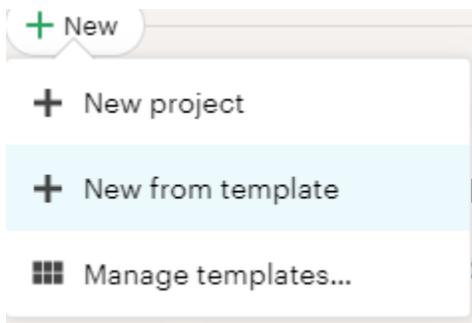
Name this project

e.g. Office Renovation

Add an optional description

e.g. Plans and scheduling for e

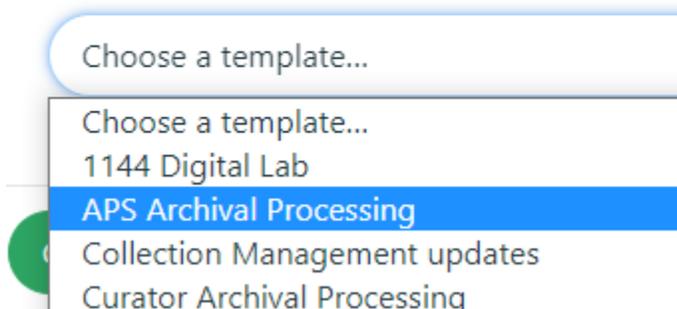
[Use a project template...](#)



Choose “APS Archival Processing” from the drop-down,

Use a project template – [Edit templates](#)

Do the same sorts of projects over and over? Save yours used messages, to-dos, files, and more to a project temp



Then name the project using this format: [Call #] [title] [(other information)]

Name this project

e.g. Office Renovation

Add an optional description

e.g. Plans and scheduling for expanding the

Example: MSS 1443 Hancock County, IL court documents (migration)

Add additional description as needed, such as “new accession,” “migration project,” “value-added processing,” etc.

Then click “Create this project.” Basecamp will generate the project for you and take you to the project board.

IMPORTANT: This is the point that you should add people to the project. If you don’t add then, they’ll never know this project exists and cannot be assigned to do anything.

Add people to the project by clicking on “Invite some people” underneath the title:

MSS 9430 George O. Stewart papers

New accession



Invite some people

Once the project is created and people are added, the button will say “Add/remove people.”

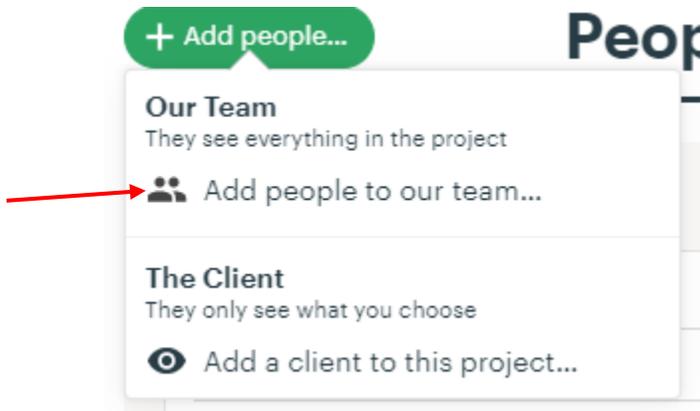
MSS 9438 Marilyn Curtis White papers

To process newly accessioned materials in Special Collections.



Add/remove people

By clicking on either of these buttons, it will take you to another screen called “People on the Project.” Click on the green button, “+Add people...” and then “Add people to our team...”



If you start typing their name into the field, you should be able to select them from a list and populate the field:

A screenshot of the 'People on the project' form in Basecamp. The form is titled '1. Who do you want to add?' and contains fields for Name, Email, Title, and Company.

Choose whether to add another person or click “Send now” at the bottom to add the person. It gives you an option to add a note to go with the email invitation:

A screenshot of the 'Add another person' or 'Pick people from a company...' form in Basecamp. The form is titled '2. Add a personal note to the invitation email (optional)' and contains a text input field for a note.

Back to the project: Basecamp will have pre-loaded the checklist template into the “To-dos” board:

MSS 1434 Jesse Knight papers

To process newly accessioned materials in Special Collections.

KG ML NB RW RL Add/remove people

Campfire



Chat casually with the group, ask random questions, and share stuff without ceremony.

Message Board

KG Found in workroom
This was found at 1156-A-3- it

To-dos

Curatorial Pre-Processing

- Appraisal form reviewed, completed, and filed in the case file
- Department record search conducted
- Instrument of gift and/or invoice and correspondence filed in case file
- Call number and accession number generated in Archival Identifiers

Click on this board and begin filling out the first section, which will guide you through appraisal and accessioning. Check off the boxes when they are complete:

0/10 completed

Curatorial Pre-Processing

- Appraisal form reviewed, completed, and
- Department record search conducted

You can also click on a task to open it. This allows a space to make notes, start a discussion, select a due date for the task to be completed, and assign to others.

Mark this done!

Appraisal form reviewed, completed, and filed in the case file

Added by Karen G. on Jul 31

Assigned to Type names to assign...

When done, notify Type names to notify...

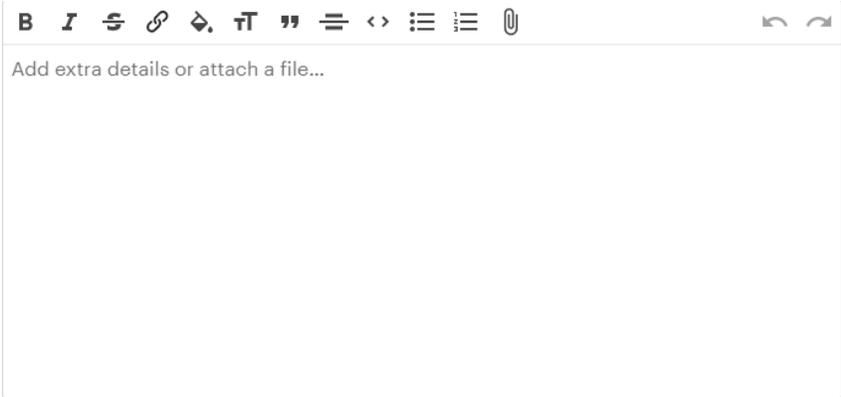
Due on Select a date...

Notes Add extra details or attach a file...

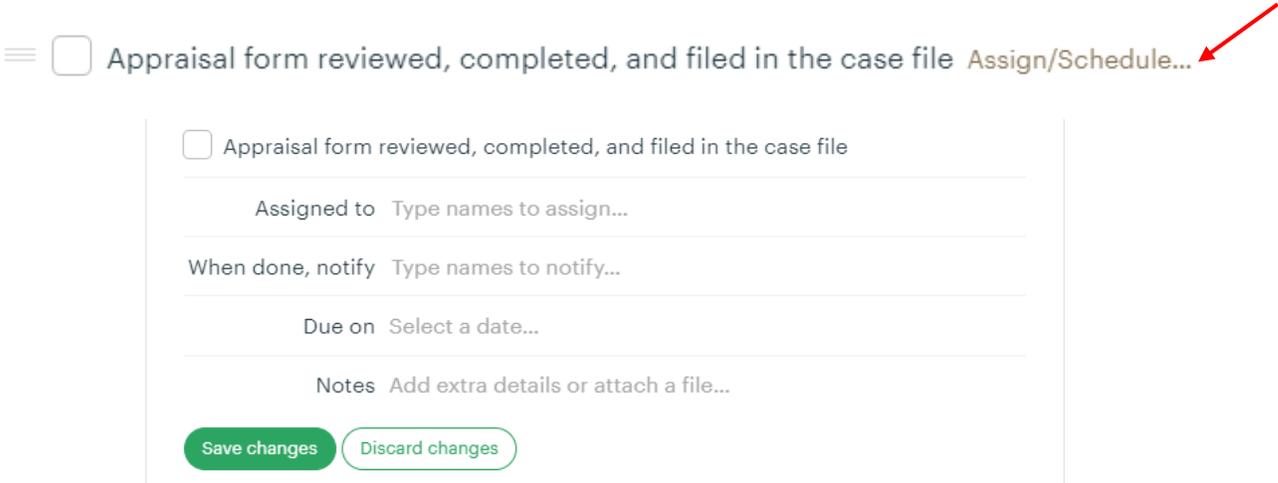
Discussion

KG Add a comment or upload a file...

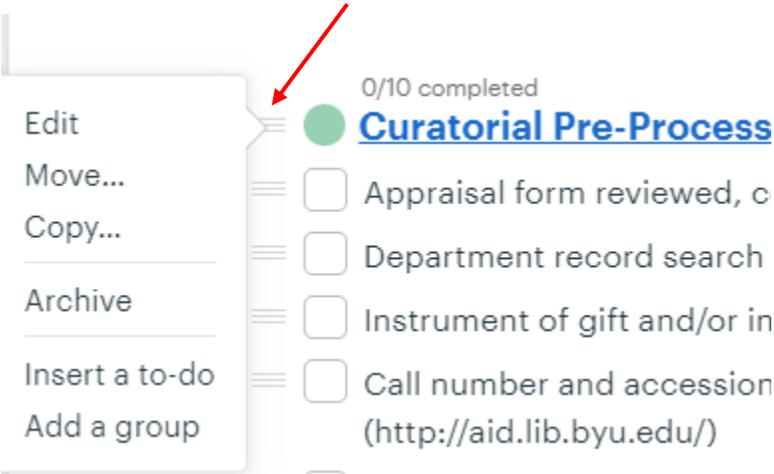
If you click on “Notes,” it will bring you to a screen where you can add attachments, links, or write narrative that can be edited in different colors and formatting:



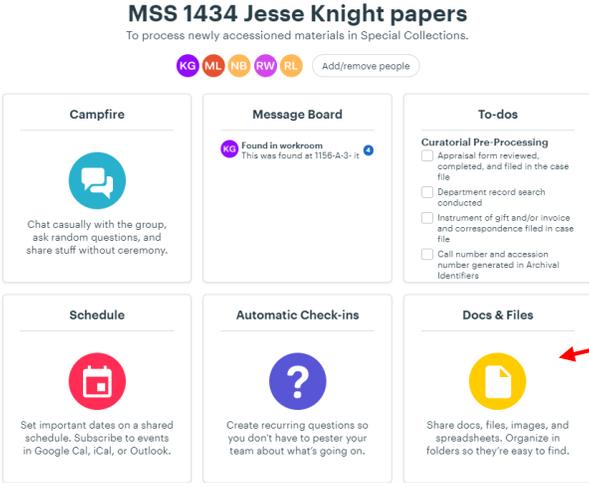
You can also assign tasks to others by hovering over tasks in the main list. "Assign/Schedule" appears in brown font on the right, and will open up a smaller dialogue box that has the same function options:



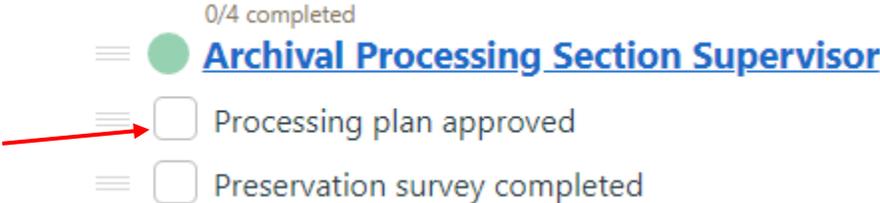
Click on the three lines to the left of the task to edit the task name, move the task to another to-do section, copy it, delete it, or insert a new task.



To upload a processing plan, spreadsheet, or any other helpful documentation, use the “Docs & Files” board:



Once you have completed all the tasks you have, assign the next task to someone else. If you have completed accessioning, assign “Processing plan approved” to Karen under the To-do list “Archival Processing Section Supervisor.”

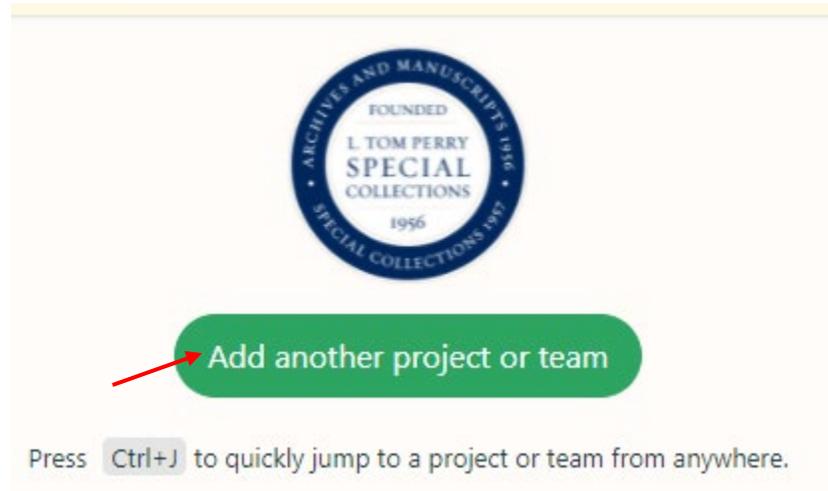


Then assign Collections Management to post a location and scan the case file:

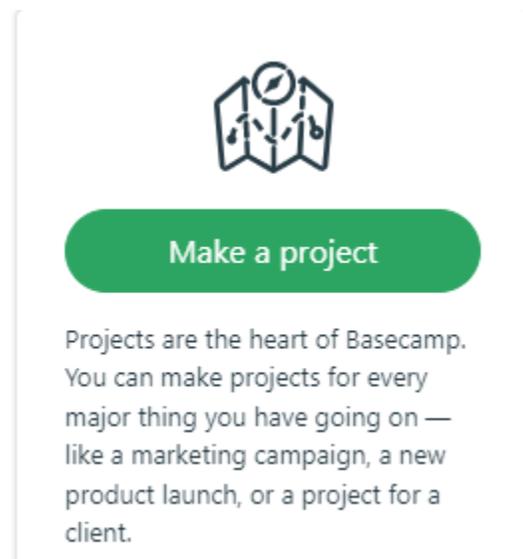


Curator Processing

On home screen, click add another project or team:



Select Make a project:



Click on Use a project template...

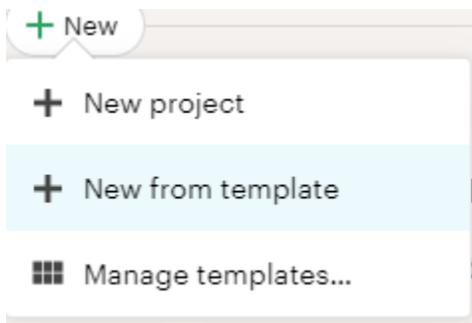
Name this project

e.g. Office Renovation

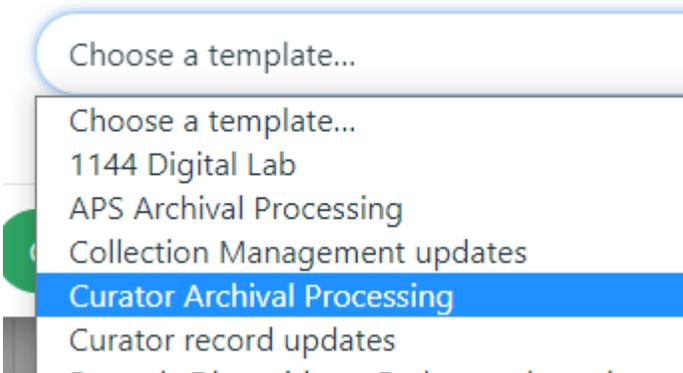
Add an optional description

e.g. Plans and scheduling for e

[Use a project template...](#)



Then choose “Curator Archival Processing” from the drop-down.



Name the project using this format: [Call #] [title] [(other information)]

Example: MSS 1540 Joseph F. Merrill papers (physical review)

Then click “Create this project.” Basecamp will generate the project for you and take you to the project board.

IMPORTANT: This is the point that you should add people to the project. If you don't add them, they'll never know this project exists and cannot be assigned to do anything.

Add people to the project by clicking on "Invite some people" underneath the title:

MSS 9430 George O. Stewart papers

New accession



Invite some people

Once the project is created and people are added, the button will say "Add/remove people."

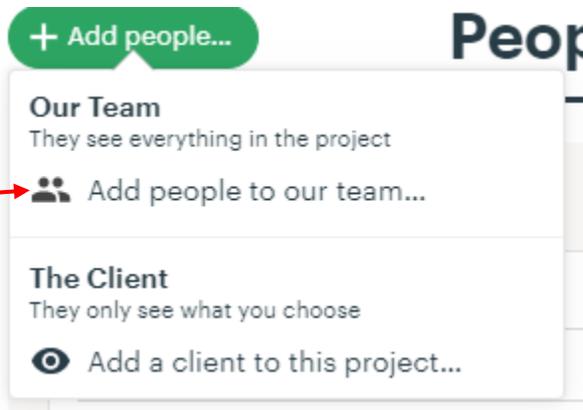
MSS 9438 Marilyn Curtis White papers

To process newly accessioned materials in Special Collections.



Add/remove people

By clicking on either of these buttons, it will take you to another screen called "People on the Project." Click on the green button, "+Add people..." and then "Add people to our team..."



If you start typing their name into the field, you should be able to select them from a list and populate the field:

+ Add people...

People on the project

1. Who do you want to add?

Name  Ryan Lee

Email: ryan_lee@byu.edu

Title: Curator

Company: Special Collections

Choose whether to add another person or click “Send now” at the bottom to add the person. It gives you an option to add a note to go with the email invitation:

or ▾

2. Add a personal note to the invitation email (optional)

3. Preview and send email

Click on the newly created project.

Back to the project: Basecamp will have pre-loaded the checklist template into the “To-dos” board. This checklist looks the same as the APS processing checklist, except the APS sections are missing:

MSS 1434 Jesse Knight collection
For processing newly accessioned materials without the involvement of the Archival Processing Unit.

KG Invite some people

Campfire
Chat casually with the group, ask random questions, and share stuff without ceremony.

Message Board
Post announcements, pitch ideas, progress updates, etc. and keep feedback on-topic.

To-dos

Curatorial Pre-Processing

- Appraisal form reviewed, completed, and uploaded to Basecamp or submitted in case file
- Department record search conducted
- Instrument of gift and/or invoice and correspondence uploaded to Basecamp or submitted in case file
- Call number and accession

Click on this board and begin filling out the first section, which will guide you through appraisal and accessioning. Check off the boxes when they are complete:

1/10 completed

Curatorial Pre-Processing

- Appraisal form reviewed, completed, and
- Department record search conducted

You can also click on a task to open it. This allows a space to make notes, start a discussion, select a deadline for the task to be completed, and assign to others.

Mark this done!

Appraisal form reviewed, completed, and filed in the case file

Added by Karen G. on Jul 31

Assigned to Type names to assign...

When done, notify Type names to notify...

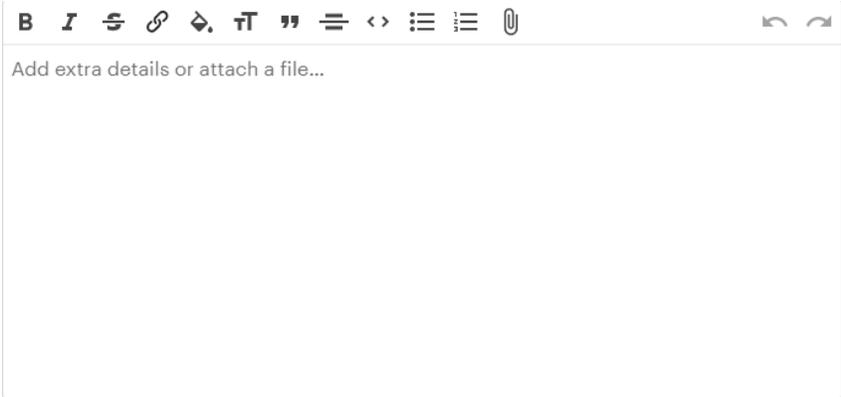
Due on Select a date...

Notes Add extra details or attach a file...

Discussion

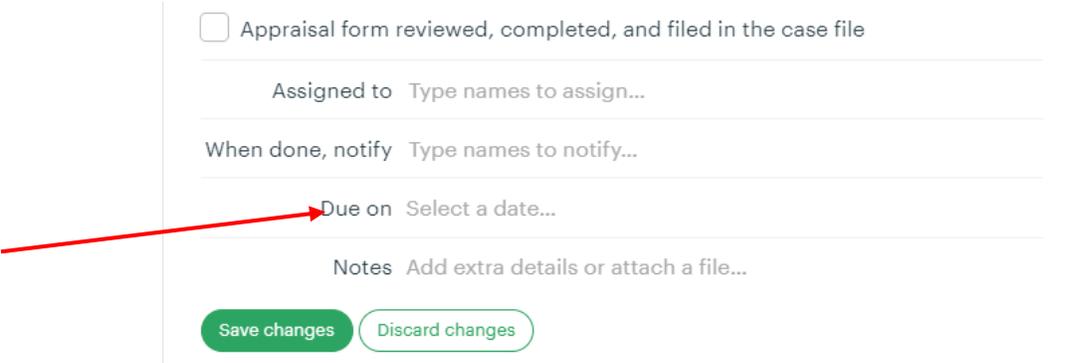
KG Add a comment or upload a file...

If you click on “Notes,” it will bring you to a screen where you can add attachments, links, or write narrative that can be edited in different colors and formatting:



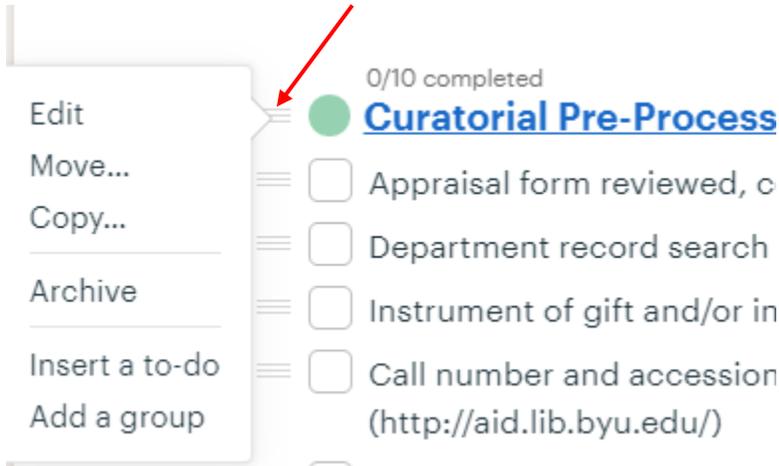
You can also assign tasks to others by hovering over tasks in the main list. “Assign/Schedule” appears in brown font on the right, and will open up a smaller dialogue box that has the same function options:

☰ Appraisal form reviewed, completed, and filed in the case file **Assign/Schedule...**

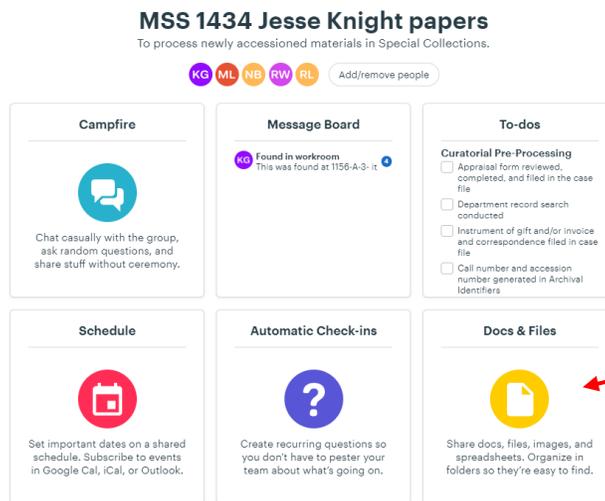


Note the ability to assign a due date!

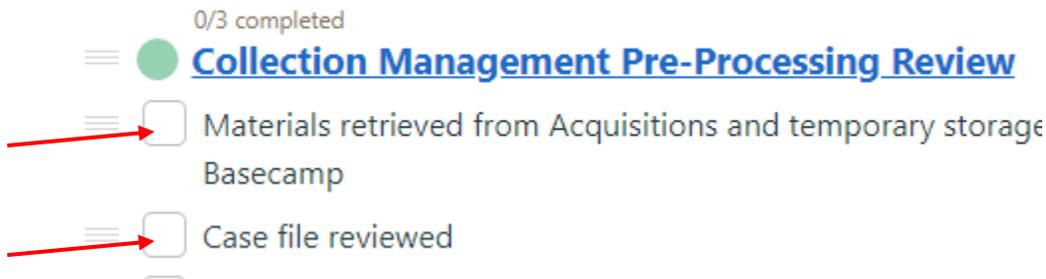
Click on the three lines to the left of the task to edit the name, move the task to another To-do section, copy it, delete it, or insert a new task.

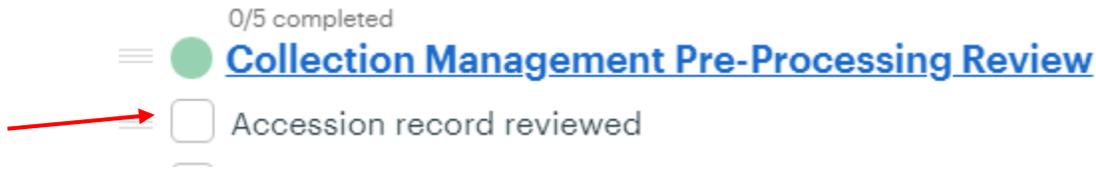


To upload a processing plan, spreadsheet, or any other helpful documentation, use the “Docs & Files” board:

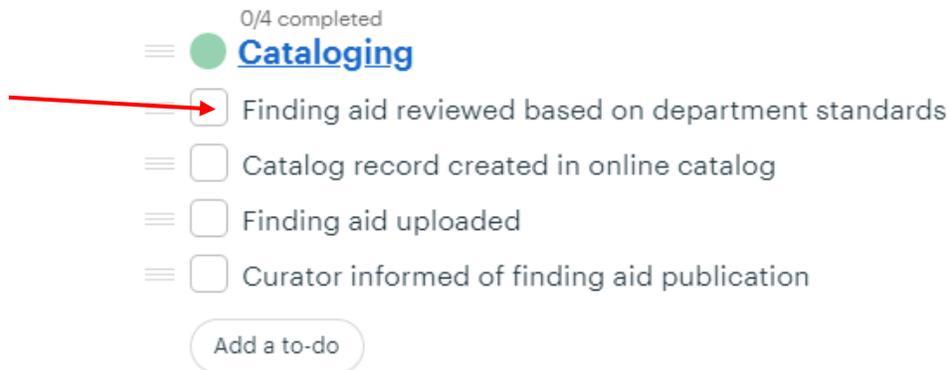


Once you have completed all the tasks you have, assign the next task to someone else. If you have completed accessioning, assign Collections Management to post a location and scan the case file:





Once the accessioning and processing are complete, Becca will be the next person to assign to review the finding aid and complete the catalog record.



Other Functions in Basecamp

To find the teams and projects, use “Ctrl + J” to find by name, or browse by clicking on “view all projects & teams” below the pinned projects:

Pinned and recent above – [view all projects & teams](#)

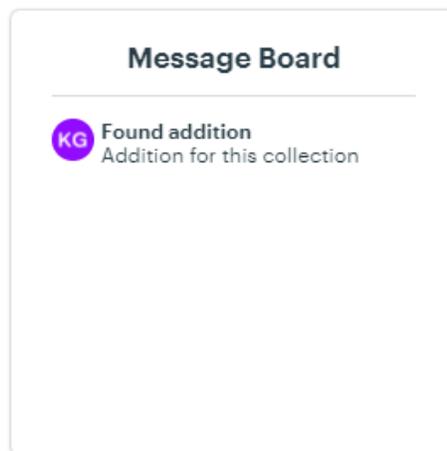
“Teams” project boards contain documentation and processing document templates attached to their “Docs & Files” boards:



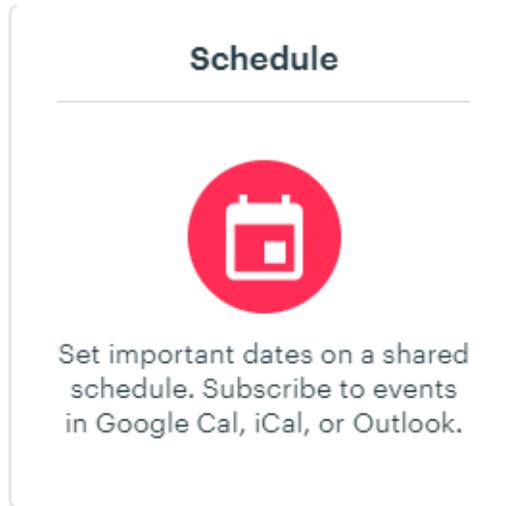
The campfire boards inside projects provide a space for casual chatting and questions. Tag people using the @ sign. Adding attachments is possible:



The message board inside projects allow users to make a statement with a title, and use a note section similar to other parts of Basecamp that allows attachments, font color and size changes, etc.



The Schedule board allows you to set make events related to the project and add them to Outlook or a Google Calendar:



The top navigation bar has lots of useful functions:



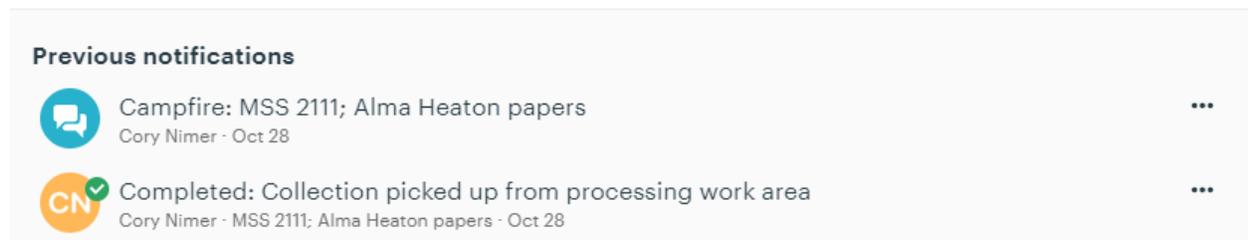
Home takes you back to the main list of projects.

Lineup shows all of the projects assigned deadlines on layered on a timeline together.

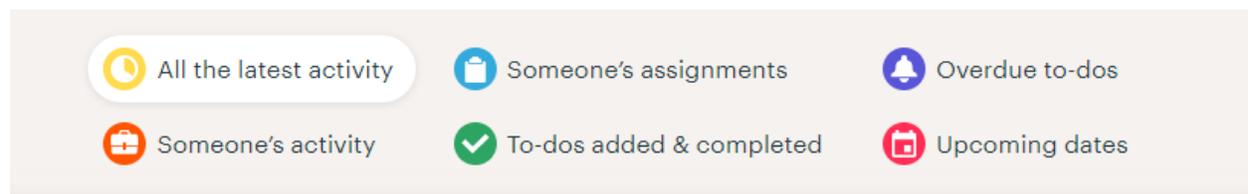
Pings starts a private chat with anyone that is part of Basecamp.

Hey! is a list of notifications of actions taken by others on projects you are assigned to:

Nothing new for you.



Activity displays the following options:



All the latest activity lets you can look at all the recent activity on projects visible to you

Someone's activity let's you see just the activity of one person

Someone's assignments displays just the assignments of anyone added to Basecamp

To-dos added & completed displays day-by-day activity of all projects you are assigned to

Overdue to-dos displays overdue tasks if this function was utilized on projects you were assigned to

Upcoming dates lets you check for upcoming events if the “Schedule” board was utilized.

My Stuff Allows you to look at the list of your assignments, drafts of notes you haven’t completed, your recent activity, and other helpful functions, such as bookmarks, scheduling, and boosts people have given you.

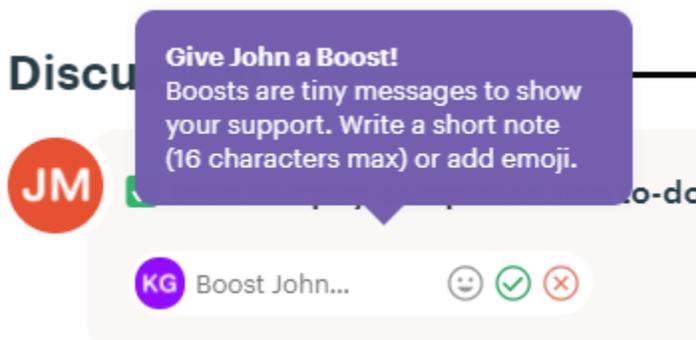
- ✓ My Assignments (99)
- 🔖 My Bookmarks
- 📅 My Schedule
- 📄 My Drafts (5)
- 🕒 My Recent Activity
- 🚀 My Boosts

Recently visited

To-dos added & completed

What’s a boost?

When people complete a task or make a comment you can click on the rocket next to the notification and give them a “boost.” It allows you to put a smiley face, or a positive or negative sign that you liked or didn’t like what they did, as well as a comment.



Lastly, *Find* on the top navigation bar is a really useful advanced search tool:

Search for...

Search Everything by Anyone **Everywhere**