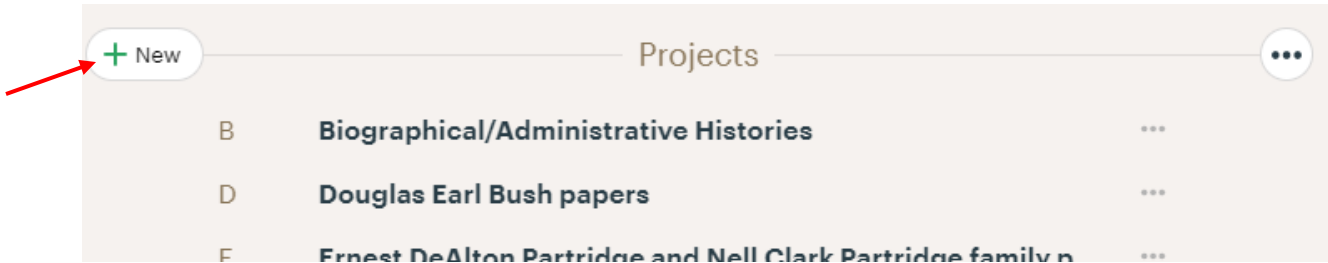
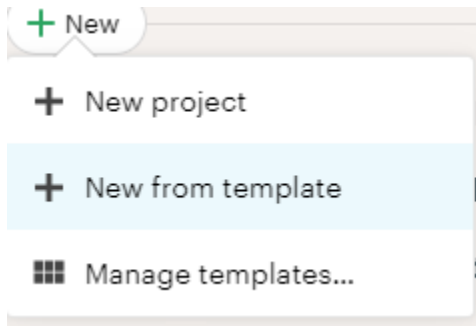


APS Processing:

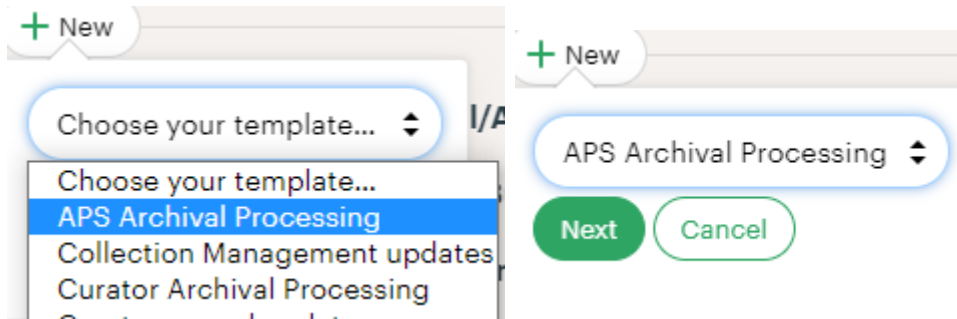
Under projects, click on + New:



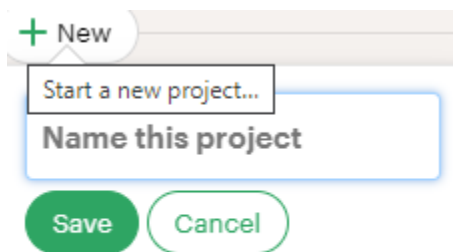
Select + New from template:



Then choose "APS Archival Processing" from the drop-down, then select "Next."

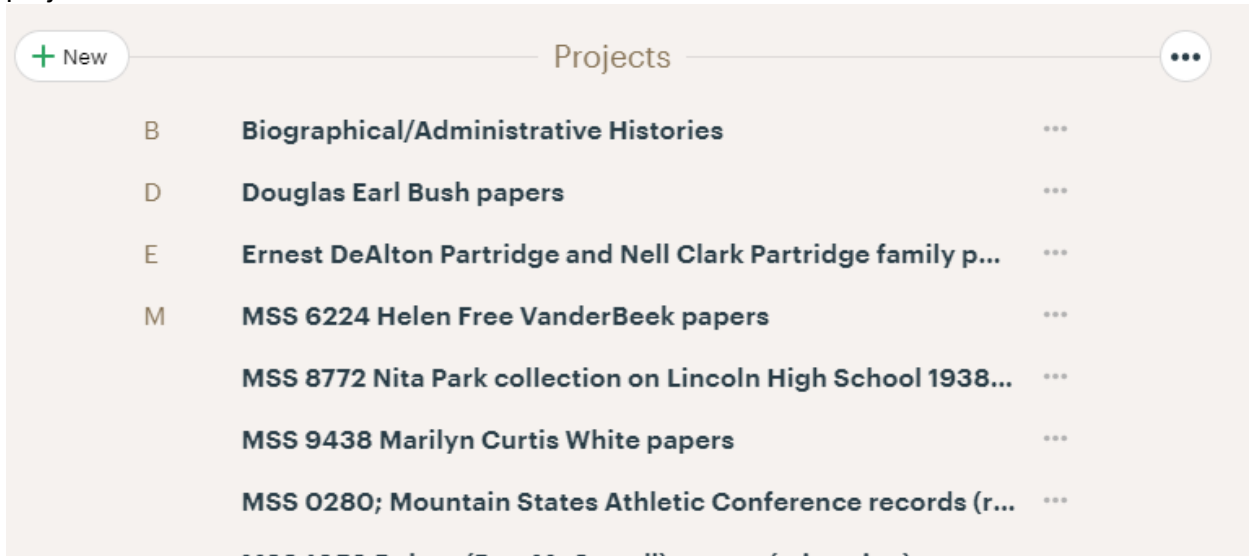


Then name the project using this format: [Call #] [title] [(other information)]



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

Then click save. Basecamp will generate the project for you and place it in the list under projects:



Click on the newly created project.

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.

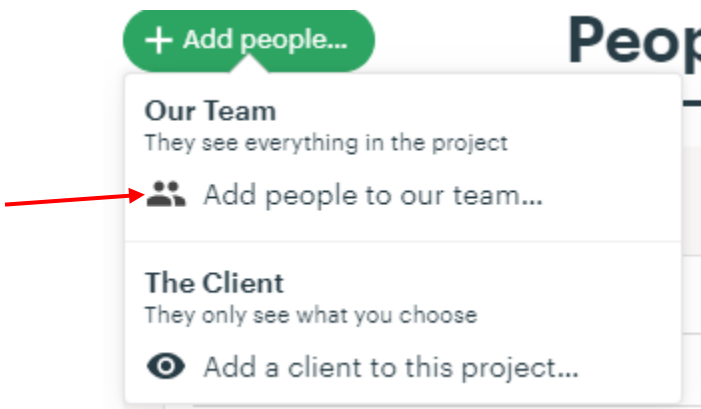
Add people to the project by clicking on "Add/remove people" underneath the title:

MSS 9438 Marilyn Curtis White papers

To process newly accessioned materials in Special Collections.




This 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:

[Add another person](#) or [Pick people from a company...](#)

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


Add a personal note to the email

3. Preview and send email


[Preview the email](#) [Send now](#)

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.



 [Add/remove people](#)

Campfire



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

Message Board

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

To-dos

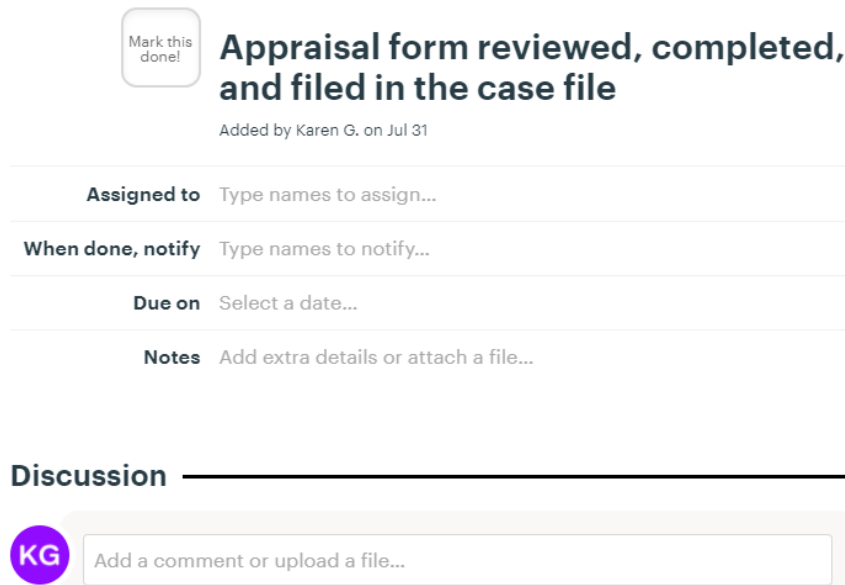
Curatorial Pre-Processing

- 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

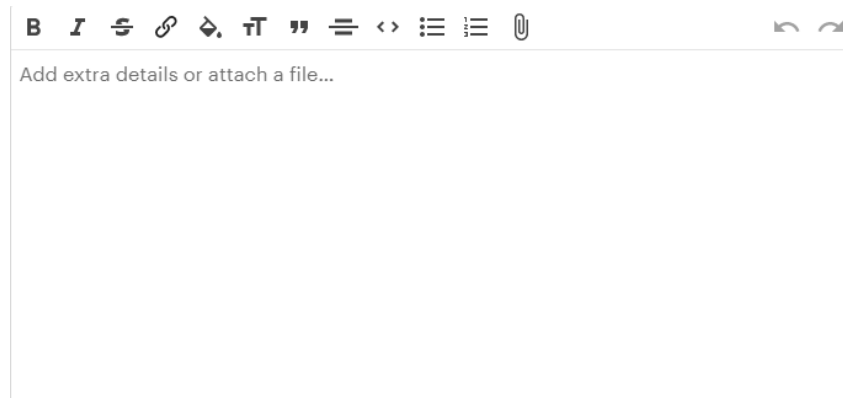
Click on this board and begin filling out the first section, which will guide you through appraisal and accessioning. Check off the boxes when they are complete:



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.



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...](#)

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

Assigned to

When done, notify

Due on

Notes

Note the ability to assign a due date!

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

0/10 completed

Curatorial Pre-Process

☰ Appraisal form reviewed, c

☰ Department record search

☰ Instrument of gift and/or in

☰ Call number and accession
(<http://aid.lib.byu.edu/>)


- Edit
- Move...
- Copy...
- Archive
- Insert a to-do
- Add a group

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

Schedule




Set important dates on a shared schedule. Subscribe to events in Google Cal, iCal, or Outlook.

Automatic Check-ins



Create recurring questions so you don't have to pester your team about what's going on.


Docs & Files




Share docs, files, images, and spreadsheets. Organize in folders so they're easy to find.

Once you have completed all the tasks you have, assign the next task to someone else. If you have completed accessioning, assign "Accession record reviewed" to Matthew under the To-do list "Collection Management Pre-Processing Review."



0/5 completed

 **Collection Management Pre-Processing Review**

 Accession record reviewed

Curator Processing:




Under projects, click on + New:

 **+ New** Projects 

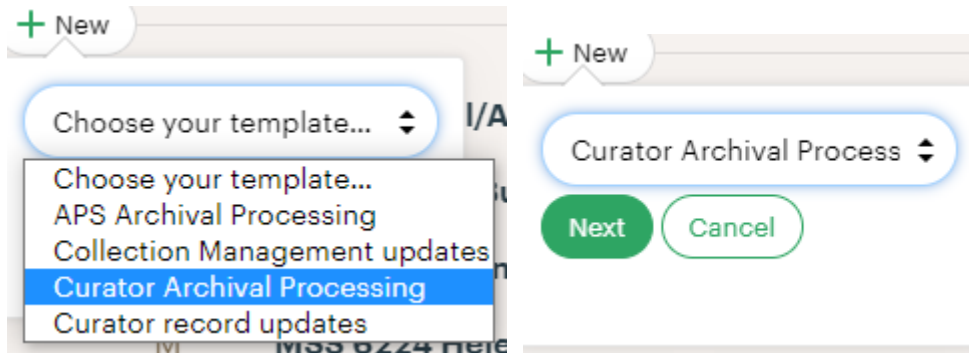
B	Biographical/Administrative Histories	...
D	Douglas Earl Bush papers	...
E	Ernest DeAlton Partridge and Nell Clark Partridge family p...	...

Select + New from template:

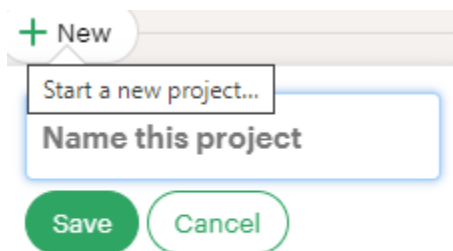
+ New

-  New project
-  **New from template**
-  Manage templates...

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

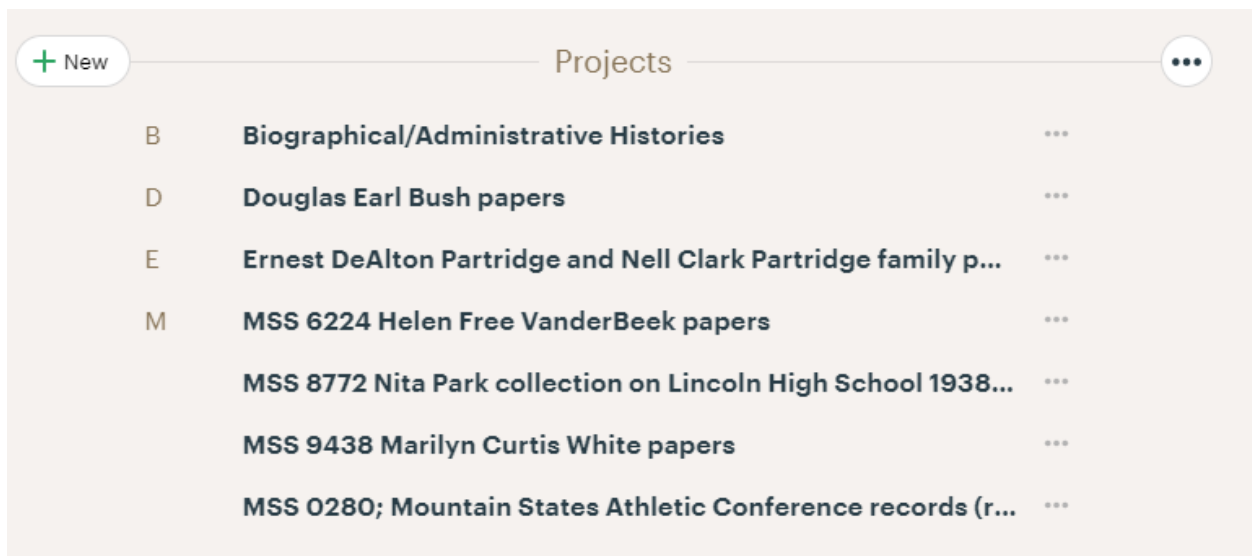


Name the project using this format: [Call #] [title] [(other information)]



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

Then click save. Basecamp will generate the project for you and place it in the list under projects:



Click on the newly created project.

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.

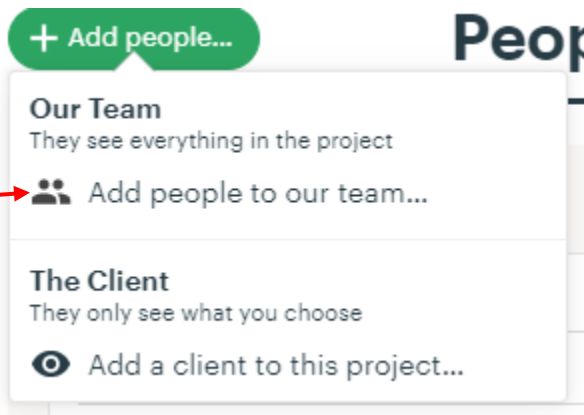
Add people to the project by clicking on “Add/remove people” underneath the title:

MSS 9438 Marilyn Curtis White papers

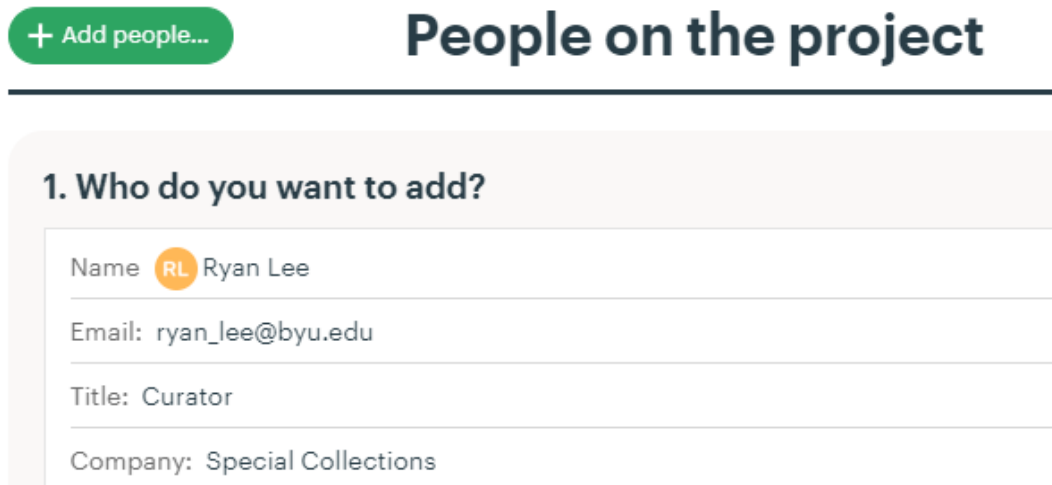
To process newly accessioned materials in Special Collections.



This 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:



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:

Add another person or Pick people from a company... ▾

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

Add a personal note to the email

3. Preview and send email

Preview the email Send now

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:

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 deadline for the task to be completed, and assign to others.



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:

The image shows a rich text editor interface. At the top is a toolbar with icons for bold (B), italic (I), strikethrough (ABC), link (chain), unlink (chain with slash), text color (T), background color (T with box), bulleted list (list), numbered list (list), and link icon (U). Below the toolbar is a text area with the placeholder text "Add extra details or attach a file...".

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

Assigned to

When done, notify

Due on

Notes

Note the ability to assign a due date!

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

0/10 completed

Curatorial Pre-Process

- Appraisal form reviewed, c
- Department record search
- Instrument of gift and/or in
- Call number and accession (http://aid.lib.byu.edu/)

Menu options: Edit, Move..., Copy..., Archive, Insert a to-do, Add a group

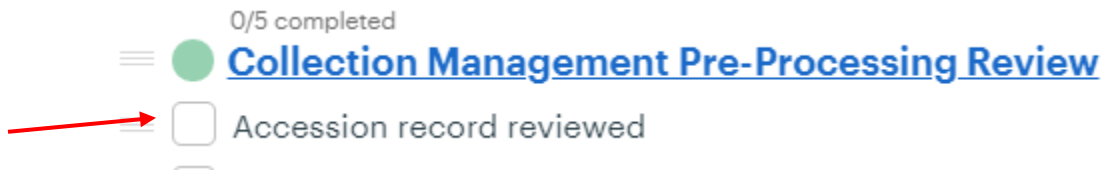
To upload a processing plan, spreadsheet, or any other helpful documentation, use the “Docs & Files” board:

MSS 1434 Jesse Knight papers
To process newly accessioned materials in Special Collections.

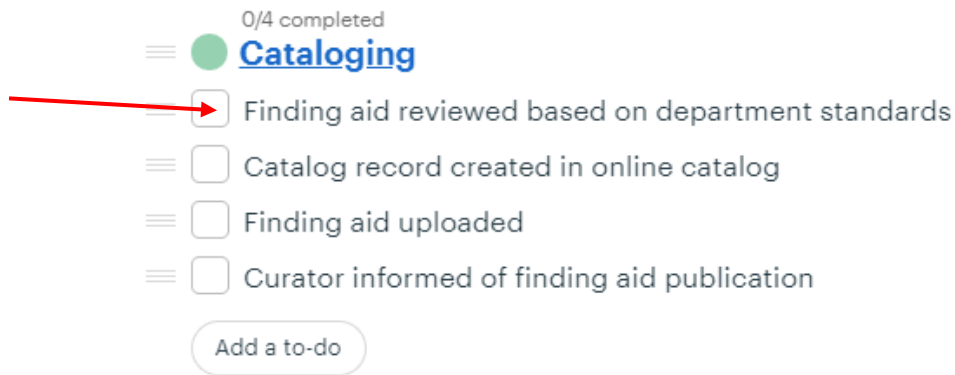
KG ML NB RW RL Add/remove people

Campfire Chat casually with the group, ask random questions, and share stuff without ceremony.	Message Board Found in workroom This was found at 1156-A-3-11	To-dos Curatorial Pre-Processing <input type="checkbox"/> Appraisal form reviewed, completed, and filed in the case file <input type="checkbox"/> Department record search conducted <input type="checkbox"/> Instrument of gift and/or invoice and correspondence filed in case file <input type="checkbox"/> Call number and accession number generated in Archival Identifiers
Schedule Set important dates on a shared schedule. Subscribe to events in Google Cal, iCal, or Outlook.	Automatic Check-ins Create recurring questions so you don't have to pester your team about what's going on.	Docs & Files Share docs, files, images, and spreadsheets. Organize in folders so they're easy to find.

Once you have completed all the tasks you have, assign the next task to someone else. If you have completed accessioning, assign "Accession record reviewed" to Matthew under the To-do list "Collection Management Pre-Processing Review."

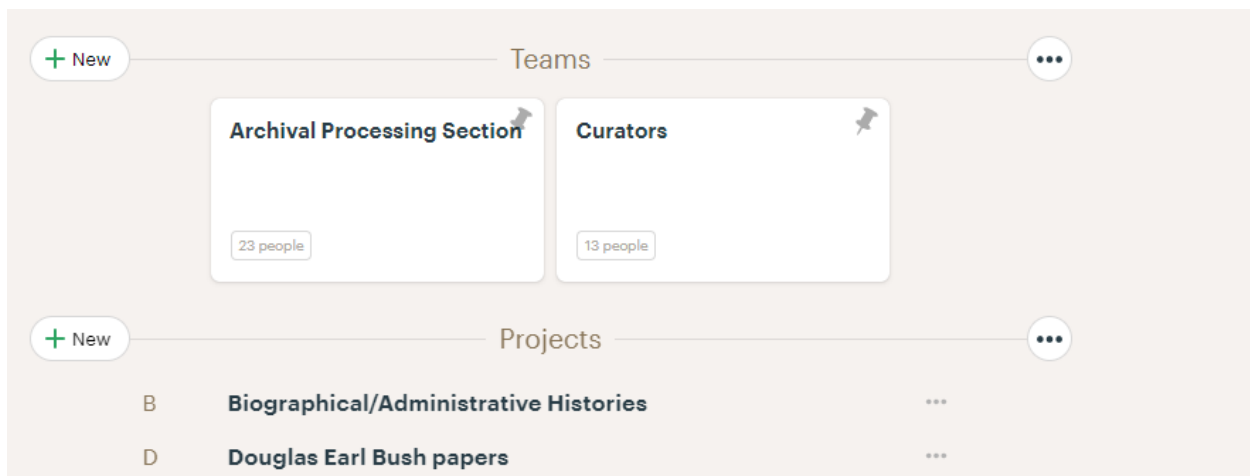


Once the accessioning and processing are complete, Becca will be the next person to assign to review the finding aid and complete the catalog record.



Other functions in Basecamp:

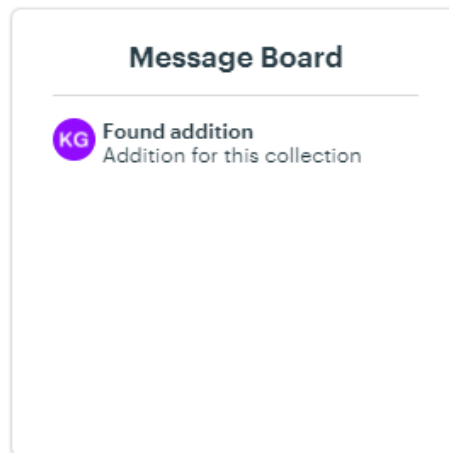
The "Teams" project boards at the top of the landing page contain documentation and processing document templates attached to their "Docs & Files" boards:



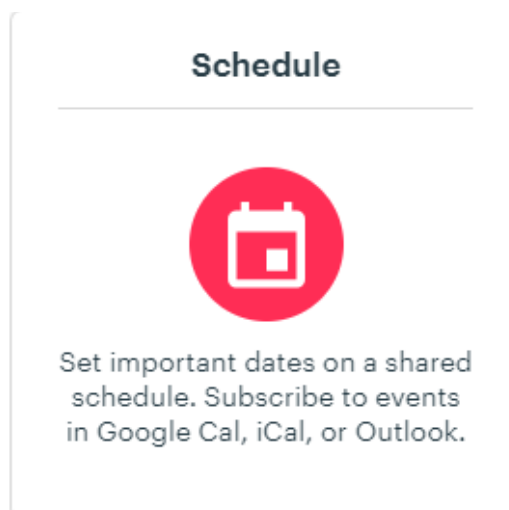
The campfire boards inside projects provide a space for casual chatting and questions. Adding attachments is possible:



The message board inside projects allow users to make a statement with a title, and 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:

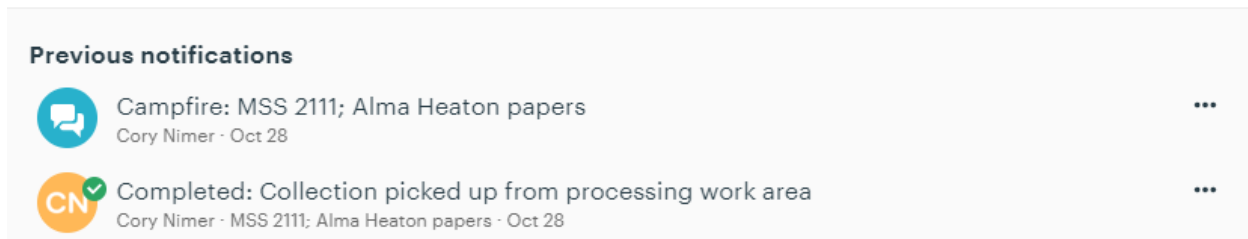


Home takes you back to the main list of projects.

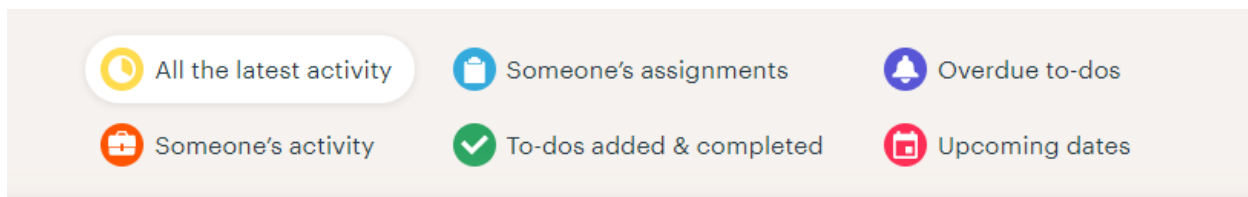
Pings starts a private chat with anyone that is part of Basecamp.

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:



You can look at all the activity on projects visible to you, display the assignments of anyone added to Basecamp, check overdue to-dos if this function was utilized on projects you were assigned to, look at the activity of someone else added to Basecamp, check the daily To-dos added and completed and look through previous days, and 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.

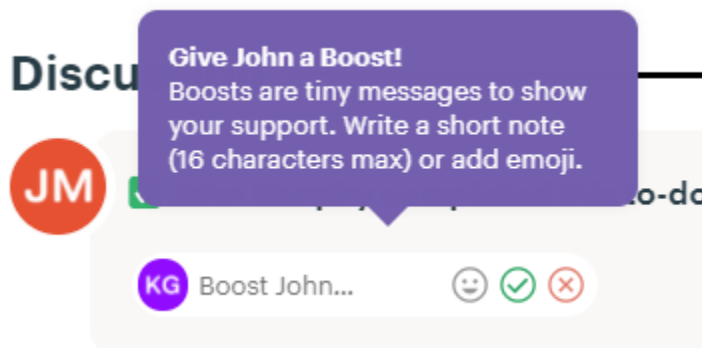
- ✓ My Assignments (99)
- 🔖 My Bookmarks
- 📅 My Schedule
- 📄 My Drafts (5)
- 🕒 My Recent Activity
- 🚀 My Boosts

Recently visited

To-dos added & completed

What's a boost?

When people complete a task you can click on the rocket next to the task 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