

Guide to Processing and Digitizing Materials in Marshall University Special Collections

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Introduction

This document seeks to outline general considerations and standards used for accessioning, processing, describing, digitizing, making accessible, and caring for special collections and archival materials at Marshall University. It will also outline current practices and sources of information to document institutional memory.

Subjects not covered in this manual include:

- Fee structures
- Collection development policies and priorities
- Usage forms and policies
- Circulation desk policies and procedures
- Reading room policies and procedures

Existing Platforms and Internal Sources of Information

The list and description of the information platforms and storage methods is as follows:

Marshall Digital Scholar (MDS)

- Houses finding aids, inventories, and serves as the primary digital content management system for university archives and manuscript materials:
- Primary link for public access to finding aids:
 - https://mds.marshall.edu/research_guides/
- Primary link for public access to digitized assets:
 - https://mds.marshall.edu/sc_digital_collections/
- Contact: Anne Luca
- Email: support@cs.bepress.com
- See Appendix 7 for information about using and uploading to MDS.

Sharepoint Online

- Houses all working files that need to be frequently accessed. This includes anything that needs to be shared with the department for communal use such as newly created or access copies of digitized items, policy and procedure documents, and collection management and access documents. Keeping these assets in a shared location ensures departmental continuity and mitigates any loss of institutional memory during periods of transition.
- See Appendix 8 for a full description of Sharepoint organization and practices.
- Link:
<https://livemarshall.sharepoint.com/sites/libarchive/Shared%20Documents/For%20ms/AllItems.aspx>

Shared Drive

- Used as an on-premises physical backup for digital preservation purposes. Only materials that are to be stored for long-term purposes are to be kept there. Adding materials should only be done when new materials requiring long-term care, such as new finding aids, preservation copies of digitized materials, etc., are created. Detailed information on usage of the shared drive is located in Digital Preservation Policies and Procedures and Appendix 8.
- Server address: <\\munas\libarchive>
- Contact IT and CC Lori Thompson to set up new users and update user permissions.

Special Collections' Web Presence

- Website:
 - Houses exhibits and basic information about the department, collections, and methods of searching for public consumption.
 - Link: <https://www.marshall.edu/special-collections/>
 - People with editing privileges: Lori Thompson and Lindsey Harper
- LibGuide:
 - Provides a more accessible and easy to configure resource for teaching individuals how to access and use Special Collections.
 - Link: <https://libguides.marshall.edu/usingspecialcollections>
 - Owner and person with editing permissions: Lori Thompson

Physical Resources

- Accession data, deeds of gifts, and sometimes assess restriction information is housed in the accessions filing cabinet in 217.

Accessioning

Any donated or internally transferred collection must be accessioned, that is, formally accepted into the archive, by the Head of Special Collections. At Marshall University Archives and Special Collections, this is done through a deed of gift form. The following information about the collection must be noted when the collection is received:

- Donor name
- Donor contact information
- Brief description of materials
- Any restrictions on the collection
- Donor signature agreeing to:
 - Convey copyright (if desired)

- Public access
- Digitization/scanning and distribution of materials for which the donor owns copyright

A deed of gift may be located in Appendix 2 of this document.

When a collection is accessioned, it is assigned an accession number that will be used as the primary identifier for the collection. These numbers are sequential. To find the latest unused number and record the new accession information for a manuscript collection, use the following spreadsheet on Sharepoint Online:

https://livemarshall.sharepoint.com/:x:/s/libarchive/ES9sZJZjGEIzhzJp_sdGa_sB_5_l1YTei7xKaH_UxUP3NQw?e=zKHmjY

Additionally, a physical file folder featuring the accession number and name of collection or donor should be created. This folder should contain the deed of gift and be filed in the accessions cabinet in room 217.

Location information, which includes, at a minimum, the room in which the item is located, should be logged in the collections management spreadsheet located on the departmental Sharepoint:

<https://livemarshall.sharepoint.com/:x:/s/libarchive/EbsiwgQ2OUIPqPDBNZ1PE7YBRXmiGExdF-ivQAFr4AWSHw?e=MOg8WO>

Location information for newly accessioned items may be rudimentary as items are often received in an unorganized state, but recording this information is vital for keeping track of unprocessed collections and ensuring rudimentary access for users where possible.

Processing Policies and Procedures

Archival collections are unique and require varying levels of attention and description depending upon the content and importance of the collection being processed. During archival processing, materials are appraised for their research value and use, weeded if necessary, physically and intellectually arranged, described, and provided with archival housing. Broadly, Special Collections seeks to follow a more product, less process (MPLP) approach due to limited resources.

Appraisal and Initial Processing

The amount of intellectual and physical labor used to process a collection should be proportional to the research value of a collection. For instance, a collection covering a topic of high interest for our researchers should be processed in more detail with additional care taken for processing and description of materials at the collection and folder level. Collections with lower research value may be described in less depth and at the box level of organization. To a researcher, any access is better than no access.

Additional processing resources beyond the general guidance in this section may be found in Appendix 1: Standards for Reference.

When we receive a physical collection, whether manuscript collections or university archives, it's important to note the organizational scheme in which the items arrived. Are materials pre-folded with descriptive labels or sorted into similar categories? Or are materials haphazardly thrown in boxes? If the materials are in folders with names on them or are in distinct groupings, retain the name or grouping. Maintaining folder titles or groupings minimizes work for the archivist and helps retain the original order and provide researchers insight into how the collection was intended to be used and understood by the creator.

If folders are untitled, refer to guidance in the *Folder Titles* section. If the folders are in sufficiently good physical condition and there are no items such as photographs or other media for which preservation is a special concern, retain the folder. Otherwise, if the folders or labels are falling apart or folders contain fragile items, refolder items in acid-free folders.

For larger collections, a series, or intellectual grouping of similar materials, may be used to break materials into organizational sections. Series might include materials by format (such as a series for photographs) or by purpose of creation (such as a series for personal materials and another for business records). A series should only be used in instances where usage of a series meaningfully contributes to a user's understanding of the collection. To see examples of series and a finding aid, see Appendix 4: Sample Finding Aid in this document.

If items do not have a coherent order present, survey the collection to determine existing formats (i.e. photographs, film, correspondence, records) and determine what type of organization may be most useful to a future researcher that minimizes the amount of labor required to arrange materials by the archivist. Determine where groupings of items exist and place materials of similar formats (such as photographs or films) or materials that were created by the same individual or process (such as meeting minutes or correspondence) together. By sorting items that are similar, you create an organizational structure when one is lacking. Only remove staples, pins, or other materials that are actively rusting or harming the collection materials.

For information on what to do with born-digital materials, such as CDs, thumb drives, and other media, consult the Digital Preservation Policies and Procedures portion of this document.

Preservation Considerations

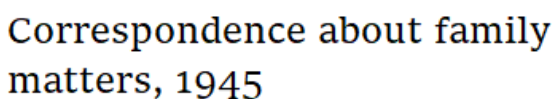
Existing folders should only be replaced with acid and lignin-free folders when they are dirty, damaged, the label is falling off or it is unable to be labeled, or where the original folder poses preservation issues to the item.

All materials should be placed in acid and lignin-free archival boxes. Materials will then be stored in a climate controlled archival storage area. High-risk materials, such as nitrate film, should be placed in designated cold storage.

For information on what to do with born-digital materials, such as CDs, thumb drives, and other media, consult the Digital Preservation Policies and Procedures portion of this document.

Folder Titles

Folder names should be as descriptive as possible, including the type and date range of the content within the folder. They should not be composed of words such as “Miscellaneous” which are devoid of meaning. At a minimum, what is written on the folder should include the folder title (see the example below). For collections of higher research value that merit closer attention, folders may also contain information about the accession number, box number, and folder number of the folder in question.



Correspondence about family matters, 1945

For collections that already have descriptive folder titles given by the creator of the collection that properly identify the content, those folder titles should be used. If those folder titles are vague or inaccurate, the folder title may be changed to be more descriptive of the actual content of the folder.

Box Labels and Location Information

To minimize confusion for users and archivists, all boxes should be labelled sequentially. For example, boxes should be numbered 1, 2, 3, 4, etc. rather than 1a, 1b, 1-45, or another method of numbering.

Full Hollinger labels (manuscript collections):

<https://livemarshall.sharepoint.com/:w:/s/libarchive/EeWwfWsGtnVHuGO-AaQz9MYB6tBNpx8DxvIIH9qDsYNH6Q?e=7wLJug>

Half Hollinger labels (manuscript collections):

<https://livemarshall.sharepoint.com/:w:/s/libarchive/EVaB3PegGHlAlRjbajvbymwBjmlGrGugVD Bg2qNfPFo42w?e=masHA8>

Location information, which should have been posted at the time of accession and include, at a minimum, the room in which the item is located, should be updated in the collections management spreadsheet located on the departmental Sharepoint:

<https://livemarshall.sharepoint.com/:x:/s/libarchive/EbsiwgQ2OUIPqPDBNZ1PE7YBRXmiGExdF-ivQAFr4AWShw?e=MOg8WO>

Finding Aid Creation and Upload

Special Collections follows the minimum descriptive principles outlined in “Describing Archives: A Content Standard” created by the Society of American and linked in Appendix 1: Standards for Reference. A sample finding aid that follows typical Special Collections conventions can be seen in Appendix 4. Appendix 4 also contains examples of container lists for processing collections in varying levels of intensity and detail.

A digital version of the template can be downloaded here:

<https://livemarshall.sharepoint.com/:w:/s/libarchive/ESsDnGLh5-5Ghbic7EtBoXIBJ2hdllpV3cWGcv-enOPUyw?e=vXfVhz>

Once finding aids are created, they are uploaded to Marshall Digital Scholar, Sharepoint Online, and the shared drive.

Marshall Digital Scholar

Once created, Microsoft Word finding aids are sent to the Archivist and Digital Preservation Librarian (for manuscript collections) or the Archivist and Records Management Librarian (for university archives collections), converted to PDF, and uploaded to Marshall Digital Scholar in the relevant section linked below:

University Archives:

https://mds.marshall.edu/ua_finding_aids/

Manuscript Collections:

https://mds.marshall.edu/sc_finding_aids/

Other Inventories/Assorted Collections:

https://mds.marshall.edu/sc_misc_inventories/

In addition to the finding aid itself, the following information is needed to upload materials to MDS:

- Title
 - Formatted as the four digit accession number and the name of the collection, i.e. “0001: Robert Gilchrist Family Papers, 1783-1957”. Formatting the title this way allows MDS to sort the collection in order by accession number.
- Author
 - Always “Marshall University Special Collections” .
- Document Type
 - Always “Finding Aid”.
- Date
 - The year the finding aid was created.
- Keywords

- Free-text keywords relevant to the content of the collection.
- Disciplines
 - Selected from a list created by bepress relevant to the content of the collection.
- Abstract
 - Usually the scope and content note from the finding aid or some other overview of the collection content.
- Rights
 - Generic rights statement is as follows: Special collections material is obtained from many sources and is intended primarily for research and educational purposes. Certain works may be protected by copyright, trademark, or related interests not governed by the department. It is up to the researcher to verify that they have permission to use these materials for publication or other activities.
- Accession Number
 - Full accession number formatted as follows: 1973/01.0001
- Recommended Citation
 - Formatted as follows, changing the collection name and accession number as appropriate: Robert Gilchrist Family Papers, 1783-1957, Accession No. 1973/01.0001, Special Collections Department, Marshall University, Huntington, WV.
- Access and Use
 - Formatted in HTML (copy and paste the below text):
 For more information or to use any of these collections, contact:

 Special Collections, Morrow Library

 Marshall University

 One John Marshall Drive

 Huntington, WV 25755

 (304) 696-2343

 speccoll@marshall.edu

Sharepoint Online and the Shared Drive

In addition to being posted in the relevant section of MDS, finding aids should also be stored on the Sharepoint Online site in the relevant section:

University Archives:

-University Archivist provides link once set up-

Completed UA inventories:

<https://livemarshall.sharepoint.com/:f:/s/libarchive/EuKS-ryxt1VHrFKG8M8JnpEBCUUix-8FUrkeABBIMKbhTg?e=kf6SU1>

Manuscript Collections:

Completed finding aids:

<https://livemarshall.sharepoint.com/:f:/s/libarchive/EsxDnGhO7mZUqH8OO5b5u1kBwsB2o7JsSyOo76DTJ361tQ?e=Yyu2uv>

Work in progress or incomplete finding aids or inventories:

https://livemarshall.sharepoint.com/:f:/s/libarchive/Elo_Hy9QFRlQhEE-aC6kUykBjc8KgUJaMvcdE-eSf_iDrA?e=HYHA8u

Additionally, for both types of collections, a copy should be stored on the shared drive ([\\munas\libarchive](#)) for digital preservation backup purposes. The file structure on the shared drive mirrors that of the Sharepoint Online site and the finding aid should be digitally “filed” in the shared drive location mirrored on the Sharepoint Online site.

Digitization Policies and Procedures

Prior to beginning a digitization project, a collection must ideally be accessioned, processed, and described through a finding aid or formal inventory. It is critical that an archivist or researcher be able to find the physical item that corresponds to a digital file and that the file is of sufficient quality to be of research use. This section outlines the general standards and practices used for digitizing materials in the Archive’s two primary divisions.

When conducting any digitization project, refer to the relevant workflow outlined in this section for the items you are digitizing. For instance, if you are digitizing an item that has come from one of the department’s manuscript collections, refer to the Manuscript Collections Digitization Workflow section. Similarly, if digitizing materials from the University Archives, refer to the University Archives Digitization Workflow section.

Overall File Format and Digitization Quality Requirements

This section will document practices for digitizing still images, paper items, and objects, as those materials are the ones for which Special Collections has the greatest capacity to conduct digitization projects. For additional information on preferred file formats and standards for all kinds of digitization projects, see Appendix 1: Standards for Reference.

- Typed materials should be scanned at 300 DPI in a PDF file format to allow for documents to undergo text recognition. If illustrations are present, scan in color or grayscale, otherwise scan in black and white.

- Photographs and handwritten materials should be scanned in color at 600 DPI in a TIFF format unless they are fully black and white with no color tones.
- Negatives should be scanned in color at the highest possible DPI for the scanner and in a TIFF format.
- Multipage books and longer documents should be scanned and saved as a PDF at 300 DPI if typed and 600 DPI if handwritten elements are included. If the text or item has color or illustrative elements it should be scanned in color or grayscale, and black and white if neither element is present.

Manuscript Collections Digitization Workflow

Materials should be digitized or photographed by the scanner or camera most appropriate to the material or object type. For instance, objects should be photographed, oversized materials should use the oversize scanner, and tightly bound books should use the overhead scanner.

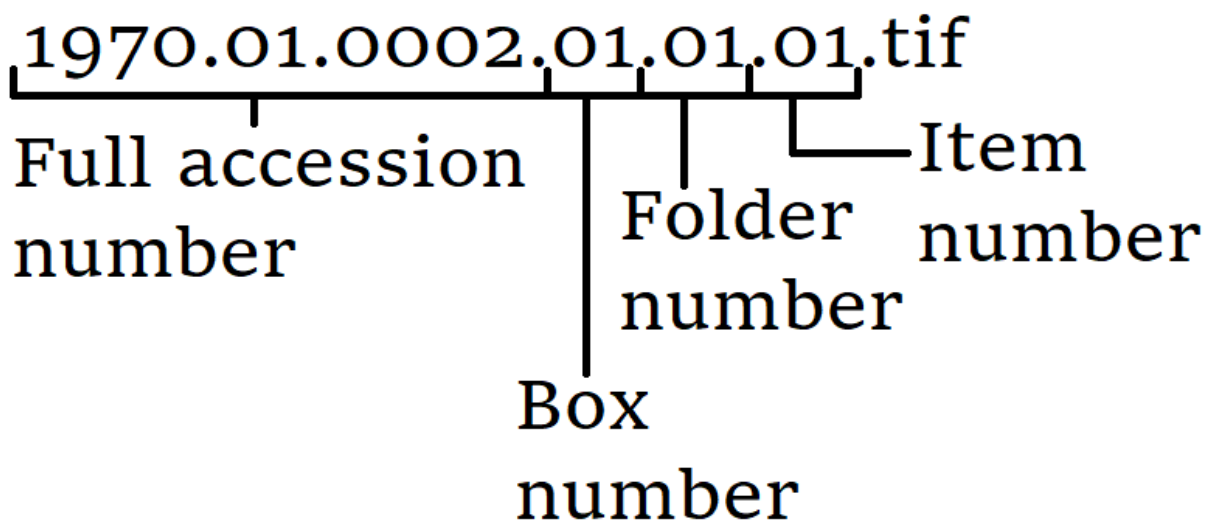
Where possible, attempt to not irreparably damage materials that are being scanned.

File Naming Conventions

File names will follow this general format:

1970.01.0002.01.01.01.tif

Though this looks like a meaningless string of numbers, it actually contains a rich amount of information, as illustrated below:



The full accession number is the accession number for the collection from which the item originates. Similarly, the box and folder number refer to the box and folder from which the item originates. The item number corresponds to the number of items that have been scanned from a particular folder thus far. For instance, if you scan one photo from a folder, it would be considered item number 01. Scanning a second photo from that folder would make that second

photo number 02. This general file naming convention will apply to materials of all file types. Where folder numbers are not present for minimally processed materials, use an abbreviated version of the folder name to substitute for the folder number. Every other aspect of the naming convention will remain the same. This number (minus the .tif file extension) should be written on the back of a photograph or on the folder from which the item came.

For TIFFs of multipage manuscript materials, insert a page number after the item number to indicate page order. Examples are as follows:

Page 1: 1970.01.0002.01.01.01.page1.tif

Page 2: 1970.01.0002.01.01.01.page2.tif

Page3: 1970.01.0002.01.01.01.page3.tif

For PDFs:

Discrete item: 1970.01.0002.01.01.01.pdf

Digital Asset Management

Once an item has been digitized, the resulting digital files are uploaded to the shared drive under the relevant folder, for example, digitized manuscript materials are uploaded to a folder for an individual collection as seen below:

munas\Working Files\Digitized Public Access Materials\Manuscripts\Acc 0090-Barta Studios\~ImageFileNameHere-.

If no folder exists for a collection, create one that contains the brief accession number and abbreviated collection name as seen in the Barta Studios example provided. **Important note:** if the file is not being uploaded to Marshall Digital Scholar for public use, create an additional folder within the collection folder titled “ItemsWithoutMetadata” as seen below:

munas\Working Files\Digitized Public Access Materials\Manuscripts\Acc 0090-Barta Studios\ItemsWithoutMetadata\~ImageFileNameHere-.

Knowing which materials are publicly available helps in retrieving copies for long-term organization and use. Only items that are publicly available on Marshall Digital Scholar should be outside of the “ItemsWithoutMetadata” folder in the base folder for digitized items from a particular collection.

Additionally, all digitized materials are also uploaded to the shared drive using the same file structure for digital preservation purposes.

For born-digital materials that require digital asset management, see the following file hierarchy for a collection. Bolded items are folders and indentions mean that there are items

within the folders. For instance, the folder “ItemsWithoutMetadata” is inside “Acc 0001 – Gilchrist” in the following example:

- **Acc 0001 – Gilchrist**
 - Inside the top level folder are digitized items that are available on MDS. These are just available in the base folder.
 - **ItemsWithoutMetadata**
 - Inside this folder will be images that were scanned for user requests but item-level metadata was not created and thus the file cannot be posted on MDS without additional effort.
 - **BornDigitalItems**
 - Items that are born digital only go in this folder. Items are divided in a way similar to digitized items:
 - **ItemsOnMDS**
 - Born digital items that have been described and uploaded to MDS can be found here.
 - **ItemsNotOnMDS**
 - As you might guess, born digital items that are not on MDS go here.

Metadata

For items that are going to be made publicly available and uploaded to the relevant section of Marshall Digital Scholar, metadata is assigned according to the metadata profile in Appendix 3.

If an item is only being digitized for a request, the metadata implicit in the file name outlined in the File Naming Conventions section previously mentioned is sufficient.

University Archives Digitization Workflow

For both physical archives turned digital and electronically received documents—these items need to be OCR searchable—meaning researchers can gather information about the material by using the ctrl+f feature to search for particular textual information.

File Naming Conventions

An important component of digitized archival materials are the file names given to the items. To successfully manage digital assets we need to know the items that we have. Similar to the **File Naming Conventions** section listed above, items will need to be given proper file names. In the event of the student newspaper *The Parthenon*, for example, a *Parthenon* from January 5th 1968 should be given a file name of *01_05_1968_Vol.68No.45*. This reflects the publication date and the volume and issue number. All file names should be in one word, using the underscores, to facilitate:

1. The batch-upload to MDS process, which requires the use of a URL, and that URL should contain one strand of data with no spaces.
2. Sorting through the data visually by month or by year, which makes the research gathering process easier for researchers and archivists alike.
3. Further, this additionally allows for us to digitally manage our assets.

Here are two more examples: Committee Meeting Minutes should be given the file name of: YYYY_Month__Date COMMITTEE NAME (2020_10_14_FacultySenate_Minutes OR 2020_10_14_FacultySenate_Resolutions). These are two separate committees within Faculty Senate.

If you get stuck on this or would prefer us to provide specific file naming conventions for a project, reach out to Archivist/Digital Preservation Librarian or the Archivist/Records Management Librarian.

Digital Preservation Policies and Procedures

An existing national standard that creates four “levels” of digital preservation and outlines benchmarks for an institution’s digital preservation capacity is the [National Digital Stewardship Alliance’s \(NDSA\) Levels of Digital Preservation](#), last updated in 2019. Used widely by archives and libraries of all kinds, the levels list actionable and achievable goals for improving digital programs. The goals are non-platform specific and allow institutions to determine how they get to a particular goal. The NDSA explicitly states that not all institutions may want or need to get to the highest level.

Though the highest levels are not always achievable, they can serve as a guide for evaluating where we want to go (or not go) and what tasks or features we want to consider incorporating into short-term and long-term plans.

For ingest and recurring maintenance, the following programs will be necessary.

- Fixity
 - Usage: “Fixity scans a folder or directory and creates a manifest of the files, including their file paths and their checksums, against which a regular comparative analysis can be run. Fixity monitors file integrity through the generation and validation of checksums, and file attendance through monitoring and reporting on new, missing, moved and renamed files.”
 - Website: <https://www.weareavp.com/products/fixity/>
 - Cost: Small recurring fee per year (\$40).
- Symantec Endpoint Protection
 - Usage: Scan items being prepared for ingest to ensure a virus is not introduced into our system.
 - Cost: Free and already installed. Even though Symantec is being phased out of networked computers, it’s installed on a non-networked computer that won’t be

able to update unless given back to IT. This makes the install of Symantec relatively stable until its license expires. When that occurs, there are many other free virus protection options available to take its place, including Windows Defender through Microsoft.

Initial Actions Upon Ingest

Note: These actions are currently beyond the scope of the department’s practices until a new employee is hired. If you’re that new employee, congrats!! You can update, edit, or throw these practices out entirely—they are just what a previous employee planned on doing to facilitate born-digital material ingest.

The ingest workflow assumes that we are adding new content into the digital preservation environment, whether it’s from a legacy collection we already have or a new collection from an outside donor. With born digital materials, what we can do will vary drastically depending on the format of the items. In the department we have the following equipment available (located in room 218 on the non-networked computer and its desk):

- 3.5 inch floppy disk drive (contemporary device, connects to PCs using USB, tends to only read mid-2000s floppy discs)
- External CD drive (connects to PCs using USB)
- Old department computer tower with 3.5 inch floppy disk reader (needs to be harvested and attached to new device. As an original piece of equipment it can read a wider range of floppy disks)
- Non-networked computer tower with built-in CD drive

Every collection is different and will require different levels of care. The following set of steps is just one example. For instance, let’s say you look at Accession 0827, an already processed collection, and see this in the finding aid:

Box 12		Series 10: Mixed Media	
	Folder 1	Floppy Disks	[10]
	Folder 2	CDs	[6]
	Folder 3	USB Flash Drive	[1]
	Folder 4	Various Papers relating to Media	[8]

While this is a good start, we can do better to facilitate access. For a user, knowing the format doesn’t really tell us much about what is on the materials. We know that, within the department, we should hopefully be able to read the floppy disks, CDs, and USB drive. What follows is a series of steps that I would take to ingest these materials properly.

1. Identify the format of the item and get the relevant piece of equipment (CD drive, floppy disk drive, etc) needed to read the item. If we do not have the equipment necessary to read the item, add the item to the finding aid by format and include as much description as possible based on the format of the item (ex: 5 inch floppy) and any content information based on labels or other accompanying information.
2. Attach the disk, drive, or CD to the non-networked computer found in room 218. Scan the content for viruses. The drive can usually be scanned for viruses by right clicking the device from the “My Computer” screen. If the drive is clear, continue to the next step.
3. Once the item is verified to be free of viruses, remove the media and take the relevant equipment needed to read the item to a computer that has access to the Special Collections shared drive and Sharepoint Online site.
4. Copy the content of the drive to the appropriate place in the Sharepoint Online site as expressed at the end of the Digital Asset Management section of this document. In summary, born digital files are stored in the Born Digital and Digitized Collection Materials area of Sharepoint Online which is broken down by collection and then accession number. To see an example of this organization, check here:
<https://livemarshall.sharepoint.com/:f:/s/libarchive/Egxj9R5nBwZXiaDz-upUd18BFVT1Fuksak0cH2-QxtYeug?e=4Yr1Cd>
5. Copy the file to the equivalent location on the shared drive. Then, run a new fixity check on that file or area of the shared drive to create fixity data.
 - a. Note: Fixity, a previously free tool, was to be used at this point. It now requires a fee of \$40 a year to use and the department does not currently have a subscription for it.
6. Once all of these baseline digital preservation actions have been conducted, create an inventory and brief description of the content to assist researchers in using the collection. Inventories might include a brief overview of what the contents are about with a list of all file names. A list of file names can be gathered by using the “Copy Path” feature of Windows Explorer. In Appendix 4 are examples of language to use when creating “container” lists of born digital materials. These inventories can then be posted on MDS and saved to Sharepoint Online and the shared drive in accordance with the procedures outlined in the Finding Aid Creation and Upload Section.

Recurring Actions

Note: These recurring actions are currently beyond the scope of the department’s practices until a new employee is hired. If you’re that new employee, congrats!! You can update, edit, or throw these practices out entirely—they are just what a previous employee planned on doing.

The recurring action and maintenance workflow assumes that files are already ingested.

1. Run monthly reports that verify that fixity, file name, and file content data has not changed (unless changed or added to by a Special Collections department member) from the previous month. These actions should be done on the content on the shared drive.
 - a. Note: Fixity, a previously free tool, was to be used at this point. It now requires a fee of \$40 a year to use and the department does not currently have a subscription for it.
2. If content has changed, repair content by replacing the changed file with one from another backup. Verify that the fixity on the new file matches the fixity data from the old file.

Digital Preservation for Department Created Documents

Department created documents that are for long term use (i.e. not drafts or other temporary files) should be uploaded to the shared drive using the same file structure for digital preservation purposes. Files should not be kept on personal devices or personal One Drive storage. Practices for organizing the Sharepoint Online site are outlined in Appendix 8.

Appendix 1: Standards for Reference

Archival Processing

General principles and specific case studies:

University of California, "Guidelines for Efficient Archival Processing in the University of California Libraries"

https://libraries.universityofcalifornia.edu/groups/files/hosc/docs/Efficient_Archival_Processing_Guidelines_v3-1.pdf

Metadata Creation

Finding aids:

Society of American Archivists, "Describing Archives: A Content Standard" - <https://saa-ts-dacs.github.io/>

Digitized materials:

Digital Public Library of America, "Metadata Application Profile" - <https://pro.dp.la/hubs/metadata-application-profile>

Digitization and Preservation

Still images, document, and object digitization:

Federal Agencies Digital Guidelines Initiative, "Guidelines: Technical Guidelines for Digitizing Cultural Heritage Materials" - <http://www.digitizationguidelines.gov/guidelines/digitize-technical.html>

Audiovisual digitization:

Indiana University Media Digitization and Preservation Initiative, "White Paper: Encoding and Wrapper Decisions and Implementation for Video Preservation Master Files" -
<https://mdpi.iu.edu/doc/MDPIwhitepaperrev.pdf>

Recommended file formats for digital materials for long-term use:

National Archives and Records Administration, "Appendix A: Tables of File Formats" -
<https://www.archives.gov/records-mgmt/policy/transfer-guidance-tables.html>

Appendix 2: Deed of Gift

A downloadable copy of this deed of gift may be found on the library Sharepoint:

<https://livemarshall.sharepoint.com/:w:/s/libarchive/EcpoZVWNHnFOjmQii85rIIAB3r5TOAu5YVqxRITNptxUHG?e=n6ND2u>

MARSHALL UNIVERSITY LIBRARIES
1 John Marshall Drive
Huntington, West Virginia 25755
DEED OF GIFT

I/We _____ of
Name(s)

Street Address

Phone Number

do legally own the items described herein, and I/we hereby give, transfer and convey finally and completely, without any limitation or reservation, full and complete ownership and title, including all literary rights (if applicable), of the following described items to Marshall University Libraries:

All materials shall be open for research use and may be used in physical and digital exhibits, and may be reproduced, digitized, and reformatted for preservation and access. These items were accessioned into the Manuscripts Collection under Accession Number:

Donor's Signature (insert name of donor)

Date

Receipt of the above described item(s) is hereby acknowledged, with much appreciation.

By: _____

representing Marshall University Libraries.

Date: _____

Appendix 3: Metadata Profile for MDS

Marshall University Archives and Special Collections adheres to the metadata standard created by the Digital Public Library of America (DPLA) and adapted by Digital Virginias, Marshall's regional DPLA hub. The following information serves as an extract for metadata field definitions as well as the required and optional fields for metadata usage within Marshall Digital Scholar, the department's digital content management system for providing access to digital materials. Bolded values emphasize the required nature of a field. Additional information about specific field usage can be found on the Digital Virginias website: <https://digitalvirginias.org/metadata/>

Field Label	Field Instructions	Required Status
Collection	Collection from which the resource originated. Use the name of the collection on the finding aid and preface the name with the four-digit accession number and a colon (i.e. 0954: Elizabeth James Collection, 1992-2021).	Y
Creator	Creator of the resource. Split into first name, middle name, and last name.	N
Institution	Institution from which the collection originates. Default value: Marshall University Archives and Special Collections.	Y
Identifier	The file name for the item (minus the file extension—i.e. 1976.01.01.01 not 1976.01.01.01.tif).	Y
Language	Language of the item (if applicable).	N
Usage Rights	Select the relevant URI for the copyright status from	Y

	https://rightsstatements.org/page/1.0/?language=en .	
Subject	Subject of the item. Use Library of Congress Subject Headings where possible, with multiple subjects separated by semicolons: https://id.loc.gov/authorities/subjects.html	N
Title	Title for the item. Titles are assigned depending upon the information resource. Prints, pamphlets, and other items with formal titles should use the title as written. Photographs, letters, minutes, and other forms should include a basic title describing the item, e.g., "Letter from Gary Price to Sean Connery, 1975" or "Huntington Women's Club Minutes, April 1, 1963".	Y
Type	Fixed vocabulary built into MDS—see DPLA Virginias standard for additional list and definitions.	N
Description	A description of the resource. Describe aspects of the resource critical to user search and understanding that may not be clear from the title or subject headings.	N
Recommended Citation	Should follow the following pattern: CreatorField.TitleField.Format.Publisher.DateCreated.Collection.URLofRecord. This field is auto populated based on other metadata.	N
Format	Fixed vocabulary built into MDS—see DPLA Virginias standard for additional list and definitions.	N
Date	Approximate date a resource was created. For items where the date is unknown, enter an approximate year and note in the description field the uncertainty regarding the date.	N
Extent	Size in centimeters, number of pages, or length of time, depending on format.	N
Place	Geographic location the item is about, depicts, or describes. Use the Library of Congress Name Authority File, with multiple locations separated by semicolons if necessary: https://id.loc.gov/authorities/names.html	N
Publisher	If an item is published, publisher of the item. Unpublished items do not use this field.	N

Appendix 4: Sample Finding Aid

A copy of the finding aid template can be downloaded here:

<https://livemarshall.sharepoint.com/:w:/s/libarchive/ESsDnGLh5-5Ghbic7EtBoXIBJ2hdllpV3cWGcv-enOPUyw?e=1aAVnB>

J. Q. Dickinson & Company Records, 1905-1996

ACC 2020/08.0861



Special Collections Department
James E. Morrow Library
Marshall University
Huntington, West Virginia
2020

J. Q. Dickinson & Company Records, 1905-1996

Summary:

Title: J. Q. Dickinson & Company Records

Span Dates: 1905-1996

Creator: Various

Repository: Marshall University Special Collections, Morrow Library (Huntington, WV)

Processed by: Austin Bailey and Elizabeth James, 2020

Accession Number: 2020/08.0861

Date Completed: October 2020

Access to Collection: Open

Extent: 75 linear feet

Donor: Purchase

Language: English

Search terms:

Business records

Coal industry

Chemical manufacturing industry

Salt industry

Natural gas industry

J. Q. Dickinson & Company

Dry Branch Coal Company

Biographical Notes:

Individuals relevant to the collection include the following figures.

William Dickinson, Jr. (1798-1881) is the son of William Dickinson Sr. (1772-1861) and continued the salt business created by his father. He also founded the Kanawha Valley Bank in Charleston, West Virginia in conjunction with his son.

John Quincy Dickinson (1831-1925) is the son of William Dickinson, Jr. (1798-1881). After the conclusion of the Civil War he restarted the Dickinson & Shrewsbury salt company that is now the J. Q. Dickinson salt company. He also founded the Kanawha Valley Bank in conjunction with his father.

Charles Cameron Dickinson (1876-1963) is the son of John Quincy Dickinson and subsequent proprietor of J. Q. Dickinson and Company. He was Chairman of the Board at the Kanawha Valley Bank.

Turner Rust Ratrie (1909-1976) was married to Mary Price Dickinson (1914-1910), who was the granddaughter of John Quincy Dickinson. He assisted in running the J. Q. Dickinson and Company business.

Business

The partnership of Dickinson and Shrewsbury took many forms, beginning with the Joel Shrewsbury & Company trade business in 1804 in Franklin County, Virginia. Joel Shrewsbury & Company specialized in the trade of tobacco and various goods. In 1809, the business morphed into Dickinson & Shrewsbury, continuing in the sale of general goods. In 1814, the company expanded into salt and agricultural production in the Kanawha Salines region of Virginia, now known as Malden, West Virginia. It was during this period natural gas was first discovered on the property and subsequently used in manufacture. In 1825, the firm opened a mercantile store in Kanawha. The firm continued to operate on this general model, in trust and cooperation with other local salt manufacturers, until the dissolution of the business in 1856. Dickinson & Shrewsbury was part of the Kanawha Salt Company, said to be the first business trust in America. The above summary is extracted from John Edmund Stealey, III's work, "Virginia's Mercantile-Manufacturing Frontier: Dickinson & Shrewsbury and the Great Kanawha Salt Industry" from *The Virginia Magazine of History and Biography*, vol. 101, no. 4, Oct. 1993, pp. 509–534

Sub-businesses run by J. Q. Dickinson and Company (salt and agriculture) in the early to mid-twentieth century include Malden Gas Company (natural gas), Dry Branch Coal Company (coal), the J. Q. Dickinson and Company commissary/general store, and an additional chemical manufacturing arm that may have been directly run by J. Q. Dickinson and Company rather than an independently established sub-company. Chemicals manufactured included potassium bromide and calcium chloride.

Scope and Content:

This collection has been divided into three series: Time Logs and Material Production Records, Financial and Transactional Business Records, and Business and Personal Files. Time Logs and Material Production Records include time logs for workers, including tasks completed and rate of pay for both salt, natural gas, and chemical production, as well as production records and statistics for both natural gas and salt. Financial and Transactional Business Records include documents related to the sale of salt, chemicals, coal, and other materials or the purchase of materials by J. Q. Dickinson and Company. Business and Personal Files are divided by client or topic and include files containing correspondence and transactions with clients, business documents ranging from advertisements to tax documentation to correspondence received, and some personal files belonging to Charles C. Dickinson, Turner Ratrie, and John Quincy Dickinson. Files for clients generally include sales made to those clients and also include correspondence to and from sub-companies such as the Dry Branch Coal Company.

Time sheets and time records record names, rates of pay, hours worked, and tasks worked, serving as a valuable record of labor practices in the early and mid-twentieth century. Though only a very small part of the collection, of note are documents relating to labor issues and striking by Dry Branch Coal Company workers. Documents in the 1990s generally relate to the usage of property owned by J. Q. Dickinson and

Company for farming purposes.

Processing Notes:

This collection was previously housed in an attic with minimal original order present. File names for folders have been maintained where extant.

Preferred Citation:

J. Q. Dickinson & Company Records, 1905-1996, Accession No. 2020/08.0861, Special Collections Department, Marshall University, Huntington, WV.

Access and Use:

For more information or to use any collection, contact:
Special Collections, Morrow Library
Marshall University
One John Marshall Drive
Huntington, WV 25755
(304) 696-2343
speccoll@marshall.edu

Container sections can take several forms. What follows are several examples of container lists for physical and digital items:

Container	Contents
-----------	----------

Example of series containing items described at the box level:

Series 1: Time Logs and Material Production Records

- Box 4
 - Contains monthly time book for J. Q. Dickinson & Co. includes names of workers, hours worked, hourly rate and total pay for the month. (Oct 1905 – Feb 1920)
- Box 31
 - Daily Time Reports for the J.Q Dickinson and Co. Information includes names of the workers, list of jobs that they did and amount of salt and calcium produced. (Jan – Dec 1909) and (Jan 1910 – Dec 1910)
- Box 32
 - Daily Time Reports for the J.Q Dickinson and Co. Information includes names of the workers, list of jobs that they did and amount of salt and calcium produced. (Jan 1911 – Feb 1912)

Example of series containing items described at the folder level, but folders did not merit numbering:

Series 2: Business and Personal Files

Box	Folder Name
Box 62	"Kanawha News" by the United States Department of Agriculture, Agricultural Stabilization and Conservation Service (1989 - 1992)
Box 62	"The Market Bulletin" by WV Department of Agriculture (1989 - 1993)
Box 61	3-M Company (Charles Town, WV) (1981)
Box 96	Agreement between Kanawha Coal Operators and the United Mine Workers of America (1914 - 1917) (Pamphlet)
Box 51	American Aniline Product Co. (1949)
Box 51	American Aniline Product Co. (1950)
Box 51	American Aniline Product Co. (1951)
Box 51	American Aniline Product Co. (1952)
Box 51	American Aniline Product Co. (1953)
Box 51	American Aniline Product Co. (1954)
Box 51	American Aniline Product Co. (1955)
Box 51	American Aniline Product Co. (1956)
Box 51	American Aniline Product Co. (1957)
Box 51	American Aniline Product Co. (1958)
Box 51	American Aniline Product Co. (1959)
Box 51	American Aniline Product Co. (1960)

Example of collection containing items described at the folder level, folders did merit numbering, but the overall collection did not merit the use of series:

Box 1	Folder Name
Folder 1	"Kanawha News" by the United States Department of Agriculture, Agricultural Stabilization and Conservation Service (1989 - 1992)
Folder 2	"The Market Bulletin" by WV Department of Agriculture (1989 - 1993)
Folder 3	3-M Company (Charles Town, WV) (1981)

Folder 4 Agreement between Kanawha Coal Operators and the United Mine Workers of America (1914 - 1917) (Pamphlet)

Box 2 Folder Name

Folder 1 American Aniline Product Co. (1950)

Folder 2 American Aniline Product Co. (1951)

Folder 3 American Aniline Product Co. (1952)

Folder 4 American Aniline Product Co. (1953)

Folder 5 American Aniline Product Co. (1954)

Two examples of born-digital only materials:

In the second example seen below, the scope and content note was used as a way of providing subject information about the image files and audio conversation based on a survey of the materials by the archivist. Such an example demonstrates alternatives to a “list of files” approach as seen in the first example.

Container

Contents

This collection is digital only. There are 51 digital files representing 50 photographs.

These files can be viewed via thumbnails below, by requesting a copy of the digital image from speccoll@marshall.edu, or by visiting Marshall Digital Scholar here: https://mds.marshall.edu/james_photo_collection/

Container

Contents

Electronic Materials

TIF Image Files	201 images
Text document	Captions for select images
WAV Audio Files	100 minutes of audio conversation

Appendix 5: Optimal Digitized Item Metadata Record

Note: Certain fields, such as publisher, are not included because they are not applicable to this particular example. Recommended citation is also excluded because it is automatically created by MDS based on other metadata. For more information about the metadata values and definitions, see Appendix 3.

Collection: Carl Barnett Photograph Collection

Creator: Carl Barnett

Institution: Marshall University Archives and Special Collections

Identifier: 2019.02.0853.01.01.02C

Language: English

Usage Rights: <http://rightsstatements.org/vocab/InC/1.0/>

Subject: Boats; Ferries; Stern Wheelers; Paddle steamers

Title: Sternwheel ferryboat Paul F. Thomas

Type: Still Image

Description: Sternwheel ferryboat Paul F. Thomas, July 1, 1936, black and white photograph. This boat ran from Proctorville, Ohio to Huntington, WV. It was based at Proctorville. Original sleeve contained several photos and negatives of a man and his family, assumed to be Paul F. Thomas (the man.).

Recommended Citation: -automatically generated-

Format: Photographs

Date: 1936-07-01

Extent: 9 x 6 cm

Place: Proctorville, OH; Huntington, WV

Appendix 6: National Digital Stewardship Alliance Levels of Digital Preservation Adherence Notes for Levels 1-3

Functional Areas	Level 1 – Know Your Content			Special Collections Adherence Notes
Storage	a. Have two complete copies in separate locations	b. Document all storage media where content is stored	c. Put content into stable storage	<p>a. Locations include: the Special Collections Sharepoint site and the shared drive.</p> <p>b. Storage locations are documented as part of the Guide to Processing and Digitizing Materials in Marshall University Special Collections.</p> <p>c. Store incoming content on Sharepoint and the shared drive in accordance with digital preservation standards outlined in the Guide mentioned in point b. of this section.</p>
Integrity	a. Verify integrity information if it has been provided with the content	b. Generate integrity information if not provided with the content	c. Virus check all content; isolate content for quarantine as needed	<p>a. No plans at present.</p> <p>b. Future, applied via Fixity as part of the ingest process.</p> <p>c. Future, conducted as part of the ingest procedure.</p>
Control	a. Determine the human and software agents that should be authorized to read, write, move, and delete content			<p>a. Authorized agents include:</p> <ul style="list-style-type: none"> • Head of Special Collections • Archivist and Digital Preservation Librarian • Archivist and Records Management Librarian • Records Management Assistant • Media Technician

Metadata	a. Create inventory of content, also documenting current storage locations	b. Backup inventory and store at least one copy separately from content		a. Future, plan to make inventory monthly via Fixity. b. Future, with use monthly fixity check as an opportunity to update content inventory and save it to Sharepoint Online and the shared drive.
Content	a. Document file formats and other essential content characteristics including how and when these were identified			a. Future, file manifests created by Fixity should identify file formats present.

Functional Areas	Level 2 – Protect Your Content			Special Collections Adherence Notes
Storage	a. Have three complete copies with at least one copy in a separate geographic location	b. Document storage and storage media indicating the resources and dependencies they require to function		a. In addition to the two copies in level one, future plans include storing digital assets in need of long-term preservation on Amazon Glacier. b. Documentation is in the department's Guide to Processing and Digitizing Materials in Marshall University Special Collections.
Integrity	a. Verify integrity information when moving or copying content	b. Use write-blockers when working with original media	c. Back up integrity information and store copy in a separate location from the content	a-b. No plans at present. c. Future, will be done as part of file manifests and checksums created by Fixity.
Control	a. Document the human and software agents authorized to read, write, move, and			a. Authorized agents include: <ul style="list-style-type: none"> • Head of Special Collections • Archivist and Digital Preservation Librarian • Archivist and Records Management Librarian

	delete content and apply these			
Metadata	a. Create inventory of content, also documenting current storage locations	b. Store enough metadata to know what the content is (this might include some combination of administrative, technical, descriptive, preservation, and structural)		a. Future, plan to make inventory monthly via Fixity. Storage locations are documented as part of the Guide to Processing and Digitizing Materials in Marshall University Special Collections. b. No plans at present.
Content	a. Verify file formats and other essential content characteristics	b. Build relationships with content creators to encourage sustainable file choices		a. No plans at present. b. Donors will be encouraged to communicate the types of born-digital content present in their collections and archives staff will encourage the usage of open and sustainable file format choices.

Functional Areas	Level 3 – Monitor Your Content			Special Collections Adherence Notes
Storage	a. Have at least one copy in a geographic location with a different disaster threat than the other copies	b. Have at least one copy on a different storage media type	c. Track the obsolescence of storage and media	a. Sharepoint Online is a cloud based system and located in a separate geographic area than the immediate university. b. Sharepoint Online is a cloud based system while the shared network drive is a physical server. c. No plans at present.
Integrity	a. Verify integrity information of content at fixed intervals	b. Document integrity information verification processes and outcomes	c. Perform audit of integrity information on demand	a-c. Future plans to run fixity checks using Fixity monthly. Fixity automatically and at will can perform audits and produce logs.
Control	a. Maintain logs and identify the human and software agents that performed			a. No plans at present.

	actions on content			
Metadata	a. Determine what metadata standards to apply	b. Find and fill gaps in your metadata to meet those standards		<p>a. Metadata standards for digitized/born digital assets used is the Digital Virginias schema for upload to DPLA. So far this only applies to public access materials uploaded to MDS. Additionally, finding aids summarize any born digital assets as needed.</p> <p>b. No plans at present unless resources change.</p>
Content	a. Monitor for obsolescence, and changes in technologies on which content is dependent			a. No plans at present.

Appendix 7: Common MDS Practices

Adding a New Digitized Item or Finding Aid

When adding a new item to MDS, you must first determine the item type (finding aid or digitized item) and select the appropriate method below.

Digitized Item

If the item is part of a collection that has items already digitized, add the items to the appropriate section of MARSHALL DIGITAL SCHOLAR depending on the source of the content. For instance, if an item comes from accession 0002, Laidley Family Papers, 1834-1944, then the item should be added to the existing structure. In this example, that structure could be found here: https://mds.marshall.edu/university_archives_digitized/

Existing structures can be found in the following locations:

Manuscripts: https://mds.marshall.edu/sc_digitized/

University Archives: https://mds.marshall.edu/university_archives_digitized/

Appendices 3 and 5 have information about required metadata and metadata standards. Information about batch uploading can be found in this Appendix.

If the item is part of a collection that has no digitized items available on MDS, then go to the Adding a New Collection of Digitized Items section within this Appendix.

Finding Aids

See the Marshall Digital Scholar subsection of the Finding Aid Creation and Upload section of this document for information on uploading finding aids.

Adding a New Collection of Items

New collections must be added as a structure within the relevant section. The primary sections that will contain the structures are as follows:

Manuscripts: https://mds.marshall.edu/sc_digitized/

University Archives: https://mds.marshall.edu/university_archives_digitized/

Contact our bepress representative Anne Luca at support@cs.bepress.com to set up new structures. When contacting the bepress representative, specify that the metadata schema used needs to match that of the custom schema used in https://mds.marshall.edu/sc_digitized/. If necessary, provide a link to a specific collection, such as https://mds.marshall.edu/gideon_papers/, as a template.

Note: if uploading audiovisual materials is a necessary part of the collection, be sure to specify to Anne Luca that, in addition to the existing metadata schema outlined in the main custom schema, multimedia embedding will also need to be enabled.

Commonly Used Structures

- Book gallery
 - Considerations:
 - Displays a thumbnail, title, metadata, and author.
 - In the record display, the image remains small and users must download it to see the high resolution version.
 - Serves as the default structure for most Special Collections materials.
 - Example in MDS: https://mds.marshall.edu/oral_history/
- Series
 - Considerations:
 - Does not display images and is not appropriate for visual material.
 - Displays titles for items in a sortable list format.
 - Example in MDS: https://mds.marshall.edu/sc_finding_aids/
- Photo gallery
 - Considerations:
 - Displays a thumbnail and title for image.
 - In the record display, the image is larger but still must be downloaded for higher resolution usage.
 - Includes an option for mapping photos with location data.
 - Example in MDS: https://mds.marshall.edu/sc_bom/

Batch Uploading and Revising

Step by step instructions and a video on batch uploading and batch revising can be found at the following links:

https://bepress.com/reference_guide_dc/batch-upload-export-revise/

https://bepress.com/reference_guide_dc/excel-batch-upload-tutorial/

Additional information about specific field usage can be found on the Digital Virginias website: <https://digitalvirginias.org/metadata/>

The following table outlines the field names seen in the spreadsheet downloaded as part of the batch upload process. All cells highlighted in red are mandatory. All others are optional.

Note regarding URLs: To create a link for the fulltext_url and cover_image_url fields you must have access to the department's file server. The file server that needs to be mapped to is "\\munetapps.marshall.edu\mds" and permissions to access it can be granted directly from the IT department at Marshall. Once an item is added to that address, all URLs for items will link to

“<https://files.marshall.edu/mds/filename.pdf>”. If you create any additional folders within that server and place items within those folders, you must modify the base URL as follows:
“<https://files.marshall.edu/mds/foldername/filename.pdf>”.

Field Name in Batch Uploading Spreadsheet	Usage	Field Name on MDS Front End
title	Title for the item. Titles are assigned depending upon the information resource. Prints, pamphlets, and other items with formal titles should use the title as written. Photographs, letters, minutes, and other forms should include a basic title describing the item, e.g., "Letter from Gary Price to Sean Connery, 1975" or "Huntington Women's Club Minutes, April 1, 1963".	Title, no field name given because it is simply on the top of the page.
fulltext_url	URL where image or file can be downloaded. Must be on a file server that allows for public access, not OneDrive, Sharepoint, etc.	N/A
cover_image_url	URL where image or file can be downloaded. Must be on a file server that allows for public access, not OneDrive, Sharepoint, etc.	N/A
keywords	Back-end subject description that will not be viewed on the front-end of the site. Good for folksonomy-type language.	N/A
abstract	A description of the resource. Describe aspects of the resource critical to user search and understanding that may not be clear from the title or subject headings.	Description
author1_fname	Creator's first name.	All author names are merged into a single name and not given an explicit field name because it is simply on top of the page under the title.
author1_mname	Creator's middle name.	
author1_lname	Creator's last name.	
author1_suffix	Suffix for creator.	
collection	Collection from which the resource originated. Use the name of the collection on the finding aid and preface the name with the four-digit accession number and a colon (i.e.	Collection

	0954: Elizabeth James Collection, 1992-2021).	
custom_citation	This field is auto-populated using other metadata entered and should only be used if the auto-populated citation is insufficient.	Recommended Citation
file_identifier	The file name for the item (minus the file extension—i.e. 1976.01.01.01 not 1976.01.01.01.tif).	Identifier
format	Select the relevant value from the controlled vocabulary list of formats, a list of approximately 30 terms which can be seen when doing an upload of a single item. See the values under format here if you have sufficient MDS permissions. Examples include: Book, Correspondence, Oral History (Document Genre), Photograph, and more.	Format
institution_of_origin	Fixed value of "Marshall University Archives and Special Collections"	Institution
item_type	Select the relevant value from the controlled vocabulary list of item types:	Type
language	Language of the item (if applicable).	Language
place	Geographic location the item is about, depicts, or describes. Use the Library of Congress Name Authority File, with multiple locations separated by semicolons if necessary: https://id.loc.gov/authorities/names.html	Place
publication_date	Approximate date a resource was created. For items where the date is unknown, enter an approximate year and note in the description field the uncertainty regarding the date. Dates may be formatted as YYYY or YYYY-MM-DD.	Date
publisher	If an item is published, publisher of the item. Unpublished items do not use this field.	Publisher
subject	Subject of the item. Use Library of Congress Subject Headings where possible, with multiple subjects separated by semicolons: https://id.loc.gov/authorities/subjects.html	Subject
usage_rights	Select the relevant URI for the copyright status from	Usage Rights

	https://rightsstatements.org/page/1.0/?language=en.	
multimedia_format(Audiovisual only)	Fixed value of "embedly"	N/A - video is embedded.
multimedia_url (Audiovisual only)	URL linking to a publicly available relevant video/image.	N/A - video is embedded.

Options for Modifying Item Locations

Grouping

Grouping allows you to move a structure, such as a book or image gallery, from one area of the site to another. Structures that have been re-grouped will no longer appear in the original area.

Video and text tutorials for using this tool can be found on the bepress site:

https://bepress.com/reference_guide_dc/group-tool-tutorial/

https://bepress.com/reference_guide_dc/creating-hierarchy-group-tool/

Note: Be sure to update all relevant structures, communities, and the site as relevant to ensure the changes are made correctly. Not doing so will have the items appearing in one location when they are no longer there. Clear your cache or use a new browser to ensure you aren't looking at old site data when testing.

Collection Tool

Unlike grouping, the collection tool does not move the base location where an item is housed—meaning that materials housed in one location of MDS, such as Administration, can also be intellectually housed under Digitized University Archives Collections. This means that a relevant item from a collection will appear if a user searches under Digitized University Archives Collections for something that would typically only appear under administration.

There are some things to note about the collection tool:

- The materials that are “collected” under a separate location will not appear in the usual list area within a community. As a result, it can be tough for users to know that the content exists. To get around this issue, the section where the items have been collected has the descriptive body text adapted to list and link to the materials that are present in the section so that users can know what content is present. An example can be seen here: https://mds.marshall.edu/registrar_materials/

Video and text tutorials for using this tool can be found on the bepress site:

https://bepress.com/reference_guide_dc/collection-tool/

https://bepress.com/reference_guide_dc/collection-tool-tutorial-manual/

Note: Be sure to update all relevant structures, communities, and the site as relevant to ensure the changes are made correctly. Not doing so will have the items indexed improperly. Test the

search functionality to ensure items are being collected correctly. Clear your cache or use a new browser to ensure you aren't looking at old site data when testing.

Help With Using Digital Commons

Contact our bepress representative Anne Luca at support@cs.bepress.com for additional questions about Digital Commons work.

You can also find additional tutorials and how-to resources on the bepress site:
<https://bepress.com/products/digital-commons/resources/>

Appendix 8: Sharepoint Practices and Shared Drive Notes

Existing Structures

The Sharepoint Online site is located here:

<https://livemarshall.sharepoint.com/sites/libarchive/Shared%20Documents/Forms/AllItems.aspx>

To gain access to the Sharepoint Site, contact the Head of Special Collections to request to be added as a user. Levels of permissions range from view-only to full control.

Sharepoint is currently divided into three overarching sections:

- Audiovisual Materials
- Working Files
- WSAZ Digital Media

The folders for WSAZ Digital Media and Audiovisual Materials are used to house WSAZ films clips and for an ongoing project to upload existing audiovisual assets respectively. Any requests for WSAZ film clips can be filled using the WSAZ Digital Media foldered materials. The more complex and relevant section is Working Files, which houses materials related to ongoing management of physical and digital special collections assets.

Working Files is divided into the following folders, with brief explanations for the contents of each folder following the name of the listed folder. All bolded names are folder names while non-bolded text is explanatory.

- **Digitized and Born Digital Collection Materials**
 - Contains materials that have been digitized by Special Collections, regardless of whether they have been posted to MDS.
- **Manuscripts Management**
 - Contains inventories, finding aids, digital deeds of gift and gift acknowledgements, location information, accession information, and other documents and materials related to managing manuscript collections.
- **Records Management and University Archives Management**
 - The University Archives equivalent of the manuscripts management section.
- **Special Collections Department Management**

- Materials related to managing the broader Special Collections Department. Materials include policies, forms, and more.

The following section shows select subfolders of the above folders most relevant to the content of this guide. Notes are interspersed throughout about how these folders are structured and how these structures can be expanded to easily manage and track digital assets. All bolded names are folder names while non-bolded text is explanatory.

- **Digitized and Born Digital Collection Materials**
 - **Manuscripts**
 - **Acc 0002 – Laidley**
 - Inside the folder is housed digital assets that have been posted online. All items scanned from this collection have been posted online.
 - **Acc 0006 – Lewis**
 - Directly inside the folder is housed digital assets that have been posted online. Not all items scanned from this collection have been posted online.
 - **MaterialsWithNoMetadata**
 - Inside this folder is housed materials that have been scanned but not placed online. Separating these materials into a different folder helps us track digitization in response to patron requests and keep a discrete record of what materials need metadata gathered for them.
 - The pattern continues for other accessions with digitized materials.
 - **University Archives**
- **Manuscripts Management**
 - **Deeds of Gift and Gift Acknowledgements**
 - Upload deeds of gift and acknowledgements of gifts sent to donors here to keep a record of materials that have been donated to Special Collections.
 - **Metadata**
 - **Legacy PastPerfect Data**
 - This folder contains a record of legacy data migrated out of PastPerfect in 2020. It should not need updated and is a record for reference.
 - MDSManuscriptsData Spreadsheet contains metadata for manuscript items in MDS.
 - **Published Finding Aids**
 - Any finding aid that has been published on MDS. File names are formatted as “Acc XXXX – brief collection name.”
 - **Templates**
 - Includes templates for labels, finding aids, deeds of gift, and more.
 - **Unpublished Inventories and Other Collection Specific Access Docs**
 - Used to house inventories in progress or initial inventories provided by donors before formal processing.
 - Location Management Spreadsheet

- Contains information about the locations of processed and unprocessed boxes that have been accessioned into manuscript collections.
 - Main Accession List Spreadsheet
 - Contains information about the basic accession data of materials that have been accessioned into manuscript collections.
- **Records Management and University Archives Management**
- **Special Collections Department Management**
 - **Policy, Form, Procedure Documents**
 - Contains various release forms, gift information, collection development policies, fee schedules, how-to documents, and similar materials.
 - **Reference Resources**
 - Various reference resources for local history to use for requests.
 - **Reports and Statistics**
 - Contains current statistics and historical departmental annual reports.
 - **Signage**
 - Printed signs used within the department.
 - **Use Permission Forms**
 - Contains completed use permission forms for outside entities using Special Collections materials.

Adding Newly Digitized Content

New content should be added according to the structure outlined in the previous section. For instance, if a collection that has not previously had materials digitized, then a folder must be created within **Working Files -> Digitized and Born Digital Collection Materials-> -relevant section for Manuscripts or University Archives-** that is named with the accession number and a brief collection name. If the newly digitized items are being uploaded to MDS then the items can be added directly to the base folder. If the items are not being uploaded immediately, create an additional folder within the accession number and collection folder titled **MaterialsWithNoMetadata** and place the materials in that folder.

Additional sections and folders should be created as the occasion arises with documentation and ease of use by department employees the central consideration.

Shared Drive Usage

The structure of the shared drive mirrors that of the Sharepoint Online Site. All assets requiring long-term digital preservation backups should be added to the shared drive in addition to the Sharepoint Online site. The structure of the shared drive mirrors that of the Sharepoint Online site and items placed on the shared drive should be placed in the same location as it is located on Sharepoint Online. Such assets include:

- Finding aids
- Digitized and born digital materials
- Backup copies of metadata for digitized materials (quarterly)
- Digital deeds of gift, accession documents, etc.
- Other materials required for long term functionality of the department