Describing and Managing Collections Guide

Appendix A: Collections Management Spreadsheet—Items tab

Field name	Core/optional	Field description: How to fill
sub-collection identifier	core	Write the sub-collection identifier to which the item belongs. If you are not using sub-collections, leave this field blank.
unique identifier	core	Write the unique identifier for the item. Previously assigned identifiers or identifiers issued by other organizations may be included in the notes field. If historical identifiers become an issue to track in the notes field, a new identifier field may also be created for them.
title	core	Copy any title or description found on the item or its container. If no title is present, you may supply your own title in square brackets. See the "Title/description of contents" field in Inventory spreadsheet.
series/project	core	If known, enter the title or a brief description of the project/series/group to which the item belongs. If none (i.e., the recording is stand-alone), enter "None"; if unknown, enter "Unknown." This is a way to further subdivide sub-collections, such as capturing "Chief & Council Meetings" and "General Band Meetings" as series within one sub-collection. You may not need this field if no such series are present. If an item is both part of a sub-collection and a series, include both of them in this field as follows: [sub-collection title] - [series title]

		See the "Sub-collection/series/project" field in the Inventory spreadsheet.
date	core	Enter the creation date for the item, if known. Write in the following format: YYYY-MM-DD. See the "Date recorded" field in the inventory spreadsheet.
physical description	core	Provide the format and the following details: For cassettes: format, duration For open reel: format, reel size, recording speed, track configuration, duration For video formats: format, play mode, duration See "Format," "Open reel: Reel size," "Open reel: Recording speed," "Open reel: Track configuration," "Duration," and "Play Mode" in the Inventory spreadsheets.
creator	core	Record the name(s) of the creator(s) of the described unit. A creator can be a person or people; a clan, tribe, or cultural group; or an organization that is primarily responsible for the creation of the described unit. For personal names, commas may be used (last name, first name), as well as quotes (Smith, John "Nickname"). Multiple names may be separated by semicolons.
contributor	optional	Record the name(s) of any contributor(s) to the described unit.

		A contributor can be a person or people; a clan, tribe, or cultural group; or an organization who aided in making the content of the described unit. This could be the person who recorded a song or the people who edited or produced a film or collaborated or consulted on a project. For personal names, commas may be used (last name, first name), as well as quotes (Smith, John "Nickname"). Multiple names may be separated by semicolons. See "Participants" in the Inventory spreadsheet.
description	core	Describe the content of the recording (including the individuals, spaces, events, places, and subjects). See any content notes generated in the digitization process.
cultural narrative	optional	Describe historical or social context, expert community knowledge, community stories, and other relevant context to the item.
keywords—subject	optional	The main topics covered by the described unit. Subjects may be made consistent through the use of an existing system (e.g., Brian Deer Classification System, Library of Congress Classification, etc.). Separate multiple subjects with " | " (space, pipe character, space).
keywords—people	optional	The person or people represented in the described unit. This may include people speaking in a recording or present in a video, and is a way to identify people that are not captured by the creator or contributor fields. Commas may be used (last name, first name), as well as quotes (Smith, John "Nickname"). Multiple names may be separated by " | " (space, pipe character, space).

keywords—place	optional	The places or locations represented or referenced in the described unit. This may include place names, territories, buildings (e.g., Longhouse), geographic locations (lakes, mountains), cities, etc., as appropriate. Multiple places may be separated by "	" (space, pipe character, space).
rights	optional	A statement about who holds the legal rights to the described unit or presented knowledge. Consider adding contact information if the rights holder should be contacted for permission to use, reproduce, circulate, reference, or cite the item.
access restrictions	optional	This field captures information about how your community provides users protocol-based access to the described unit. For example, if permission must be sought from a family to access a recording, that information would be captured here.
language	optional	The language or languages used in the described unit. Separate multiple languages with a semicolon.
location of originals	optional	If the unit you are describing is a copy, this field may be used to note where the originals are, if known. If the original is in your possession, include the unique identifier here. If the original no longer exists, or its location is unknown, give that information. See "Generation" and "Source" in the Inventory spreadsheet.
related materials	core	If there are paper documents that are directly related to the item, make note of their existence and location here.

		See "Related materials" and "Location of related materials" in the Inventory spreadsheet.
notes	optional	To provide any information that cannot be put in any other field. For example, any **legacy identifiers** (previous identifiers applied to item) can be added here. See "Comments" in the Inventory spreadsheet.
digital object	core	Link to access copy or copies, or simply provide the file name(s). Separate with a space.
transcript	optional	Link to transcript(s).
physical location	core	Provide the identifier (box number/container number/shelf number as determined by your organization) or a description of the physical location of the item. See "Location" in the Inventory spreadsheet.

Appendix B: Collections Management Spreadsheet—Sub-collections tab

Field name	Core/optional	Field description: How to fill
sub-collection identifier	core	Write the unique identifier for the sub-collection (e.g., A2021-01).
title	core	Supply a title for the sub-collection, which includes either the name of the person/organization responsible for creating the media, or the person/organization that collected the media together.
date	core	Enter the creation date range for the sub-collection, if known.
physical description	core	Record the number of items of each format (e.g., 15 audio cassettes; 8 VHS

		tapes). Separate multiple formats with a semicolon.
creator	core	Record the name(s) of the creator(s) of the described unit. A creator can be a person or people; a clan, tribe, or cultural group; or an organization that is primarily responsible for the creation of the described unit. For personal names, commas may be used (last name, first name), as well as quotes (Smith, John "Nickname"). Multiple names may be separated by semicolons.
contributor	optional	Record the name(s) of any contributor(s) to the described unit. A contributor can be a person or people; a clan, tribe, or cultural group; or an organization who aided in making the content of the described unit. This could be the person who recorded a song, or the people who edited or produced a film or collaborated or consulted on a project. For personal names, commas may be used (last name, first name), as well as quotes (Smith, John "Nickname"). Multiple names may be separated by semicolons.
custodial history	optional	Write a brief history of the sub-collection, recording transfers of ownership (if any) and how the collection came to be in your custody. If you know dates, include them. If this information is unknown, write down "unknown."
description	core	Describe any series/projects within the sub-collection, as well as the range of content of the materials (including the individuals, spaces, events, places, and subjects).

language	optional	The language or languages used in the described unit. Separate multiple languages with a semicolon.
location of originals	optional	If the sub-collection you are describing contains copies, this field may be used to note where the originals are, if known.
related materials	core	If there are paper documents that are included in this sub-collection, make note of their existence and location here.
physical location	core	Provide the identifier (box number/container number/shelf number as determined by your organization) or a description of the physical location of the collection. (If your collection has already been described and assigned physical locations at the item level, there is no need to fill this cell. This field may be used to track the physical location of sub-collections that have not yet been processed.)

Appendix C: Sub-collections

For the purposes of this guide, we have defined your **collection** as all of the items in your custody and control.

For example, your collection may include:
- open reel audio recordings of General Band meetings from the 1970s (created by the Band Administration)
- paper and digital minutes from Chief & Council meetings from the 1950s through to the present (created by the Band Administration)
- audio cassette copies of an anthropologist's oral history interviews with a community member
- two boxes of materials (including Band Administration fisheries meeting recordings, Band Administration fisheries correspondence, notebooks, personal fisheries research, personal correspondence, and personal photos) donated by a community member that was formerly an employee of the Band Administration
- audio cassettes of kitchen table family discussions (independently created by various families in the community)

- VHS recordings of community events that have been sitting in your organization's storage room for over two decades (unknown creator)

We have defined **sub-collections** as a group of materials that were made, received, or maintained by the same person, organization, or family.

When assigning items to sub-collections and describing them in the Collections Management Spreadsheet, there are two principles that we will want to keep in mind.

Firstly, materials made, received, or maintained by the same creator (person, organization, or family) should be kept together in a sub-collection and not mixed with the materials made, received, or maintained by other creators. This is to preserve important context, which may be lost if materials from different creators are intermingled.

Secondly, in general, the order in which records are organized by their creators should not be disrupted. This is because the order of the records is a product of their use, and reorganizing the records may result in important contextual information being lost. However, when processing media items, it is OK to physically separate them from any paper records with which they have been organized by their creator, but be sure to use the "related materials" field to document details about the relationship with those paper records and their physical location.

Taking from the examples listed above, the open reel audio recordings of General Band meetings and the minutes from Chief & Council meetings share a common origin: they were both created by the Band's Administration, and would therefore form part of the same sub-collection: the [community name] Band Administration sub-collection.

The anthropologist's audio cassette recordings of oral history interviews with a community member will be in a different sub-collection than the Band Administration sub-collection because their origin is different. As the cassettes were recorded by the anthropologist, in many colonial institutions the anthropologist would be considered the creator of the records, and the group of records would take the anthropologist's name: the [anthropologist's name] sub-collection. However, as the real labour of creation is in the knowledge and content provided by the community member, and not in a person pressing a "record" button, you may consider a sub-collection title that more accurately reflects this fact, for example, community knowledge-holder interviews with [anthropologist name] sub-collection.

You may also consider assigning these recordings to be a part of the [community member's name] sub-collection. However, it is important to document the context of an item's creation. For example, what information is or is not included in the recordings may be a product of how and why they were created and what the speaker was comfortable sharing with the anthropologist. Further, if the anthropologist recorded several such oral history interviews with a number of community members, you will want to ensure that the relationship between the interviews is captured (for example, in the "Related materials" field of the Collections Management Spreadsheet) if they are not assigned to the same sub-collection. This will be an important

decision point in how your sub-collections are organized and should be carefully considered and captured in a procedures document.

Donations, such as the two boxes of materials in the example above, are typically kept together in one sub-collection. This is because the creator of that group of materials is considered to be the person, organization, or family that brought the materials together. As a note, if you are accepting donations, you should create a documented Acquisition Policy.

The audio cassettes of kitchen table family discussions would fall into a number of family-based sub-collections, as they were created by each family.

Finally, if you aren't sure about the origin of materials (such as the VHS recordings above), one option is to create a "Found in [your organization's name]" sub-collection. You can include items with an unknown creator in this sub-collection and ask around your community to see if anyone recalls who created these recordings. If and when more information about the origin of these VHS recordings arises, they can be assigned to a new or existing sub-collection.

Appendix D: Crosswalks

This is a technical appendix that you do not need to worry about until you are migrating your spreadsheet to a database that uses Mukurtu, ISAD(G), or EAD as a descriptive standard.

identifier		Core element
XW: Mukurtu	Additional Metadata – Identifier	
XW: EAD	<unitid>	
XW: ISAD(G)	3.1.1 Reference Code	
Notes	Information for this field may be drawn from the "Permanent unique identifier" field in the Inventory spreadsheet. Used at item level and at the sub-collection level; called "sub-collection identifier" at the sub-collection level, and called "unique identifier" at the item level.	

title		Core element

XW: Mukurtu	Mukurtu Essentials – Title
XW: EAD	<unittitle>
XW: ISAD(G)	3.1.2 Title
Notes	Information for this field may be drawn from the "Title/description of contents" field in the Inventory spreadsheet. Used at item level and at the sub-collection level.

series/project		Core element
XW: Mukurtu	n/a	
XW: EAD	n/a	
XW: ISAD(G)	n/a	
Notes	Information for this field may be drawn from the "Sub-collection/series/project" field in the Inventory spreadsheet. If further archival processing is pursued, this information may be captured in the arrangement. Used only at item level.	

date		Core element
XW: Mukurtu	Mukurtu Essentials – Original Date	

XW: EAD	<unitdate>
XW: ISAD(G)	3.1.3 Dates
Notes	Information for this field may be drawn from the "Date recorded" field in the Inventory spreadsheet. Used at item level and at the sub-collection level.

physical description		Core element
XW: Mukurtu	Additional Metadata – Format	
XW: EAD	<physdesc>, subelements <extent>, <dimensions>, <genreform>, <physfacet>	
XW: ISAD(G)	3.1.5 Extent and Medium	
Notes	Information for this field may be drawn from the "Format," "Reel size," "Recording speed," "Track configuration," "Play mode," and "Duration" fields in the Inventory spreadsheet. Used at item level and at the sub-collection level.	

creator		Core element
XW: Mukurtu	Mukurtu Essentials – Creator	
XW: EAD	<origination>	

XW: ISAD(G)	3.2.1 Name of Creator
Notes	Used at item level and at the sub-collection level.

contributor		Optional element
XW: Mukurtu	Mukurtu Essentials – Contributor	
XW: EAD	[<origination> with a label]	
XW: ISAD(G)	[3.2.1 Name of Creator]	
Notes	Used at item level and at the sub-collection level.	

custodial history		Optional element
XW: Mukurtu	n/a	
XW: EAD	<custodhist>	
XW: ISAD(G)	3.2.3 Archival history	
Notes	Used only at sub-collection level.	

description		Core element

XW: Mukurtu	Mukurtu Core – Description
XW: EAD	<scopecontent>
XW: ISAD(G)	3.3.1 Scope and Content
Notes	Information for this field may be drawn from content notes generated in the digitization process. Used at item level and at the sub-collection level.

cultural narrative		Optional element
XW: Mukurtu	Mukurtu Core – Cultural Narrative	
XW: EAD	[<scopecontent>]	
XW: ISAD(G)	[3.3.1 Scope and Content]	
Notes	Used only at item level.	

keywords—subject		Optional element
XW: Mukurtu	Additional Metadata – Subject	
XW: EAD	n/a	

XW: ISAD(G)	n/a
Notes	See also: **description**. Used only at item level.

keywords—people		Optional element
XW: Mukurtu	Additional Metadata – People	
XW: EAD	n/a	
XW: ISAD(G)	n/a	
Notes	See also: **description**. Information for this field may be drawn from the "Participants" field in the Inventory spreadsheet. Used only at item level.	

keywords—place		Optional element
XW: Mukurtu	Additional Metadata – Place	
XW: EAD	n/a	
XW: ISAD(G)	n/a	

Notes	See also: **description**. Used only at item level.

rights	Optional element
XW: Mukurtu	Rights and Permissions – Rights
XW: EAD	<userestrict>
XW: ISAD(G)	3.4.2 Conditions governing reproduction
Notes	Used only at item level.

access restrictions	Optional element
XW: Mukurtu	[Mukurtu Essentials – Communities and Protocols], [Mukurtu Essentials – Item Sharing Settings], [Rights and Permissions – Traditional Knowledge Labels]
XW: EAD	<accessrestrict>
XW: ISAD(G)	3.4.1 Conditions governing access
Notes	Used only at item level.

language	Optional element

XW: Mukurtu	Additional Metadata – Language
XW: EAD	<langmaterial>
XW: ISAD(G)	3.4.3 Language/scripts of material
Notes	Used at item level and at the sub-collection level.

location of originals		Optional element
XW: Mukurtu	Additional Metadata – Source	
XW: EAD	<originalsloc>	
XW: ISAD(G)	3.5.1 Existence and location of originals	
Notes	Information for this field may be drawn from the "Generation" and "Source" fields in the Inventory spreadsheet. Used at item level and at the sub-collection level.	

related materials		Core element
XW: Mukurtu	n/a	
XW: EAD	n/a	

XW: ISAD(G)	n/a
Notes	Information for this field may be drawn from the "Related materials" and "Location of related materials" fields in the Inventory spreadsheet. If further archival processing is pursued, this information may be captured in the arrangement. Used at item level and at the sub-collection level.

notes		Optional element
XW: Mukurtu	n/a	
XW: EAD	\<odd\>	
XW: ISAD(G)	3.6.1 Note	
Notes	Information for this field may be drawn from the "Comments" field in the Inventory spreadsheet. Used at item level and at the sub-collection level.	

digital object		Core element
XW: Mukurtu	Mukurtu Essentials – Media Assets	
XW: EAD	\<dao\>	
XW: ISAD(G)	n/a	

Notes	Used only at the item level.

transcript	Optional element
XW: Mukurtu	Mukurtu Essentials – Media Assets
XW: EAD	<dao>
XW: ISAD(G)	n/a
Notes	Used only at the item level.

physical location	Core element
XW: Mukurtu	n/a
XW: EAD	n/a
XW: ISAD(G)	n/a
Notes	Information for this field may be drawn from the "Location" field in the Inventory spreadsheet. Used at item level and at the sub-collection level. Use at the sub-collection level may be to identify the location of materials that have not yet been processed at the item level.