Inventory Guide

About this guide

An inventory is the process of gathering information about your collection of audio and video tapes. This knowledge should help to figure out the next steps in arranging, preserving and managing the recordings. This guide offers information about what you might need to do to prepare for an inventory, and what level of detail that you might want to collect. Sample forms and a spreadsheet are provided that you can adopt and edit to accommodate your process. Finally, there is some advice on how to work with the spreadsheet summarize the data in helpful ways.

Keep in mind that the inventory process is just a snapshot of information about the collection. You should later create a Collections Management Spreadsheet or database, to keep, find and add information about your recordings.

Purpose of an inventory

The goal of an inventory is to get an overview of your collection as a whole. An inventory is a count of the number of different analog audio and video-tapes by format. It will give you an idea of the range and diversity of content or subject matter in your collection.

If you don't yet have much information about the collection and want to plan for the scope of adopting systems to preserve and manage your media, then you might just take a simple count of how many audio, or video tapes of various formats you have. You can also take a count of other qualities of the recordings, such as if they are related to Indigenous language, or certain subjects or people. This type of inventory should take relatively little time to conduct and could answer many questions that are required when planning for certain grant programs.

If you are ready to collect more detailed information about your collection then you can perform an inventory process that records information about each audio or video-tape. This type of inventory requires that an identifier be added to each tape (if it doesn't already exist). The identifier can be a temporary serial number that helps you to organize the tapes before assigning permanent identifiers. This allows you to record information about each specific tape in the collection and create summaries of different aspects of your collection. You can decide how much information about each tape is collected. This type of inventory is will take a bit more time to perform, but will also provide helpful information in planning your management and preservation systems.

You should do an inventory of your collection *before* you assign permanent unique identifiers to your media and before you perform a detailed condition assessment.

The inventory process can also be an opportunity for you to learn more about sub-collections from the original creators or long-term staff members.

These are some of the most common questions that an inventory process should enable you to answer:

Question	Purpose
How many tapes of which formats do I have?	Helps to determine requirements for space and supplies for proper storage, how many hours of work it will take for performing condition assessments or other collections work. Helps to identify potential at-risk formats, and provides a basic metric for reporting.
What is the **runtime** of the tape or written detail of recording duration?	Helps to estimate how long digitization activities will take and how much digital storage will be needed.
Where are the tapes?	Enables easy and reliable retrieval of any given tape.
What condition are the tapes in?	Identifies individual tapes or groups of tapes in obviously poor condition. At the inventory stage, this is a general, high-level note if you see obvious signs of poor condition. A detailed condition assessment can be carried out later using the guides provided with this toolkit**.**
What are the prominent **sub-collections**?	Sub-collections represent groups (for example, one particular researcher's project) that often share a narrative and access protocols. This information is useful in grant writing and in making the collection more accessible.
When were the tapes recorded?	Helps focus in on particularly valuable content or tapes likelier to be in poor condition.
Are there any ownership or access concerns?	Helps prioritize the digitization of sub-collections where rights information is clear and where digitized tapes can be made accessible to stakeholders.

The inventory stage is meant to be moved through fairly quickly, and the information you record will come from the item in hand. Don't worry if you don't have all the information the inventory spreadsheet template asks for! All fields are customizable, and you will have the opportunity to do more research on your media later. As you prepare for or complete your inventory, you may wish to remove fields that aren't relevant to your community or add fields that are. The inventory spreadsheet templates offer a starting point that can be adapted to suit your needs.

Before you begin

Safe care and handling: Before starting an inventory, all participating staff should understanding of how to safely work with audio and video- tapes. Refer to the Indigitization - Technician's Guide to Safe Care and Handling of Magnetic Media for more information.

Ergonomics: Before starting your inventory make sure that you have a well-lit work space with adequate surface area to examine the tapes as they are moved through the inventory process.

Supplies

- Labels, temporary labels, or stickers (if recording information for each tape). Price tag stickers or Avery removable labels work well as temporary identifiers.
- Boxes or shelves to store your media in or on. The inventory template has a field to record the location of each item. It is recommended to have a consistent way of naming boxes or shelves where the media reside. For example, "Shelf 1, Box 1; Shelf 1, Box 2," and so forth. This is not required if you are just performing a simple count of how audio/video-tapes.
- Personal Protective Equipment (PPE): Depending how and where tapes have been stored, they may show signs of mould or pest activity (urine stains, droppings, dead or live insects, etc.), or may just be very dirty. It is a good idea to wear nitrile gloves and a mask when handling tapes for the first time. See the *Digitization Supplies Guide* for more information on supplies you'll need for your project.

Terminology used in this guide

Container: The box, bag, tub, or other container that holds several cassettes.

Case: The individual box, or sleeve, that holds the cassette, or reel, when not in use.

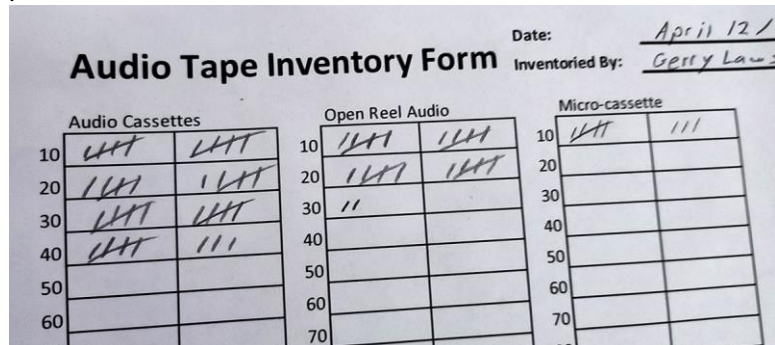**Cassette**: The hard plastic shell that holds and protects the magnetic tape.

Reel: The plastic reel that holds open reel audio tape.

Tape: A flexible ribbon with magnetic particles on one side that can hold audio and video recordings.

Performing a simple count of your audio/video-tapes

It can be very helpful to have high-level information about your collection. By performing a simple count of tapes in your collection you can answer questions about how many tapes you have of various formats. You can also identify specific information that is likely to be written on the tape labels that is important to count. If your tapes are all well-labeled then you can count the tapes that have language-related content which may be helpful for obtaining grant funding. We only recommend a simple count if your collection is fairly small (less than 100 tapes of any format). If you have a larger collection then we recommend a more detailed inventory be performed.

This should be a very fast process and help you to plan for the next steps in managing your collection.

1. Plan for what information you will collect during inventory. This information should be readily available just by examining a tape and its labels.
   - You will always count how many tapes of each format you have
   - Collecting information about how many tapes of different runtime (length) is helpful in estimating digitization time requirements
   - Does the label indicate that the recording is related to Indigenous language or related to specific subject or person?
2. Prepare paper forms, or computer/mobile application to keep a count of the different qualities that you are counting (see the sample *Inventory Form*). You might keep a different form for different formats of media.
3. Collect needed supplies (masks, gloves, pens)
4. Clear space to comfortably examine and count audio and video tapes. Have enough table space for the container (box), a space to examine individual tapes, and a space to place the tapes after they have been inventoried.
5. Bring the tapes out one container, or shelf, at a time (for items that are on shelves use a sturdy container to transport)
   - Retrieve the proper form for the format that you are looking at
   - Examine a tape
   - Add a checkmark in all columns that apply for the current tape
     Note: don't worry if information such as "manufacturer" or "runtime" isn't easily available or doesn't match a column title exactly. Use "other" or add an "unknown" category if needed.
   - Repeat for all tapes in the container
6. Repeat for all containers and shelves

7. Manually add the totals for each column of each form

190			80			80		
200			90			90		
210			100			100		

Total Audio Cassette	38	Notes: All tapes
Total Open Reel Audio	32	appear to be
Total Micro-cassette	8	in good condition
Total Mini-cassette	—	
Total MiniDisc	✓	

After performing this inventory, you can use the information to plan for your next steps in managing your collection. You will probably want to start a collections management spreadsheet to use as a place to store information about each individual tape. You should plan to assign unique identifiers to each tape, plan for proper storage conditions and plan to digitize and preserve the recordings. These totals should help you to understand the scope of each of these activities.

Performing a more detailed inventory of your audio/video-tapes

	Temporary identifier.	Date of inventory	Inventoried by	Comments	Format	Condition	High-level condition notes	Runtime (duratio	Open reel: Reel size	Open reel: Recordin g speed	Open reel: Track configurati on	Title/descriptio n of contents	Participants	Sub-collection/series/projec t	Do
3	SS-CC-01	2021-02-19	EM	oral history interview	Audio Cassette	Good		90	N/A	N/A	N/A	Hunting with Grandfather	Angus Ant-Tanager	Unknown	Shi
4	SS-CC-02	2021-02-19	EM	oral history interview	Audio Cassette	Good		90	N/A	N/A	N/A	Places He Fished	Matthew Macaw	Unknown	Shi
5	SS-CC-03	2021-02-19	EM	oral history	Audio Cassette	Good		90	N/A	N/A	N/A	Songs	Sybil Sandgrouse	Unknown	Shi
6	SS-RR-01	2021-02-19	EM	1 of 2	Open Reel	Good		60	5"	Unknown	Unknown	Memorial		Unknown	Shi
7	SS-RR-02	2021-02-19	EM	2 of 2	Open Reel	Average		60	5"	Unknown	Unknown	Memorial		Unknown	Shi
8	SS-CC-04	2021-02-19	EM	1 of 3 [missing	Audio Cassette	Average		60	N/A	N/A	N/A	All Bands Meeting		Fisheries dept. Meetings	Shi
9	SS-CC-05	2021-02-19	EM	2 of 3 [missing	Audio Cassette	Average		60	N/A	N/A	N/A	All Bands Meeting		Fisheries dept. Meetings	Shi
10	SS-CC-06	2021-02-19	EM	no case	Audio Cassette	Average		60	N/A	N/A	N/A	Boat Interview	Jacob Jacdaw	Fisheries dept. Meetings	Shi
11	SS-CC-07	2021-02-19	EM	no case	Audio Cassette	Good		60	N/A	N/A	N/A	Fishing	Matty Mallard	Fisheries dept. Meetings	Shi
12	SS-CC-08	2021-02-19	EM		Audio Cassette	Good		120	N/A	N/A	N/A	Half a day on the	Samuel Scoter and	Fisheries dept. Meetings	Shi
13	SS-CC-09	2021-02-19	EM		Audio Cassette	Good		60	N/A	N/A	N/A	[unknown]		Fisheries dept. Meetings	Shi
14	SS-CC-10	2021-02-19	EM		Audio Cassette	Good		60	N/A	N/A	N/A	[unknown]		Fisheries dept. Meetings	Shi
15	SS-RR-03	2021-02-19	EM	TUS	Open Reel	Good		60	5"	N/A	Unknown	Traditional use	Conebill Jr.	Fisheries dept. Meetings	Shi
16	SS-RR-04	2021-02-19	EM	TUS	Open Reel	Good		60	5"	Unknown	Unknown	Traditional use	Denise Dove	Fisheries dept. Meetings	Shi
17	SS-RR-05	2021-02-19	EM	TUS	Open Reel	Poor		60	5"	Unknown	Unknown	Traditional use	Ben Babbler	Fisheries dept. Meetings	Shi
18	LC-CC-01.1	2021-07-15	JG		Audio Cassette	Poor		50	N/A	N/A	N/A	Language course part 1		Language courses	
19	LC-CC-01.2	2021-07-15	JG		Audio Cassette	Poor		50	N/A	N/A	N/A	Language course part 2		Language courses	
20	LC-CC-01.3	2021-07-15	JG		Audio Cassette	Poor		50	N/A	N/A	N/A	Language course part 3		Language courses	
21	LC-CC-02.1	2021-07-15	JG		Audio Cassette	Good		50	N/A	N/A	N/A	Language course part 1		Language courses	
22	LC-CC-02.2	2021-07-15	JG		Audio Cassette	Good		50	N/A	N/A	N/A	Language course part 2		Language courses	

If you are going to record information about each individual tape then you will need a few more steps, and a more detailed way to record the information. With this in mind we have provided a *Inventory Template* spreadsheet that you can adopt and modify to your needs.

Preparing the inventory spreadsheet

Controlling what information can be entered into cells:

It is a good practice to think about what information you want to see in certain Inventory fields (spreadsheet columns) and how that information should be entered. In Excel, you can specify what kind of information is expected in a cell. For example, a cell could contain numbers, text, dates and more. You can set a default type of information for a range (group) of cells by selecting the "Home" tab on the menu bar, and then open the drop-down menu at the top-middle of the screen. A number of choices will appear and you can just select the type that you want to be the default.
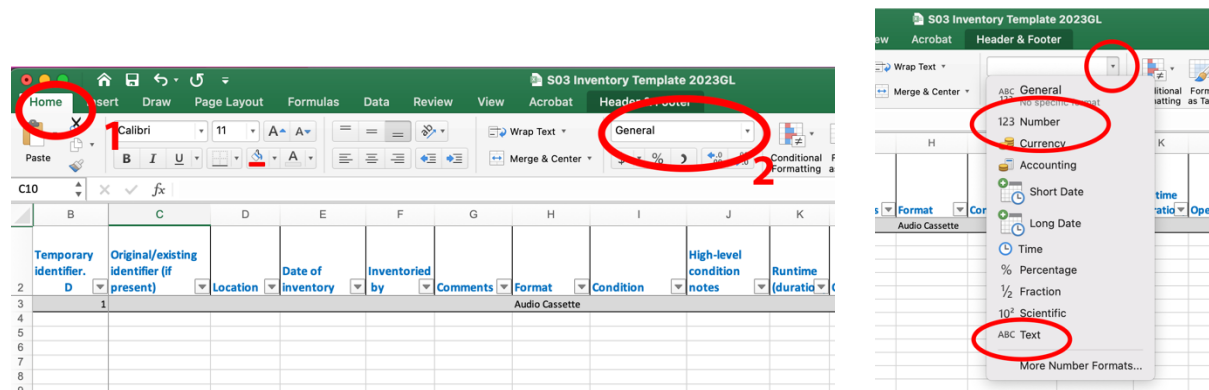

Excel treats different types of data very differently. Most information that you collect can just be entered as text. Some information in the sample spreadsheet helps to automatically calculate important information about your collection. Data in the "Runtime" column should be entered as a numerical value, instead of a textual value in order to calculate the total runtime of different types of media. Important columns are already formatted to use the proper data type.

Hiding or deleting Columns:

If you do not wish to use specific columns to collect information during your inventory, you can either delete them, or hide them. This is done by right-clicking (or control-clicking on a mac computer) the letter(s) at the very top of that column. From the menu that appears, just choose either "delete", or "hide".

Note: It is generally safest to hide columns rather than delete them. It is not always obvious if other areas of a spreadsheet use data from a specific column. The example below shows how to either hide, or delete the "Appraisal" column in the *Inventory Template Sample* Spreadsheet.
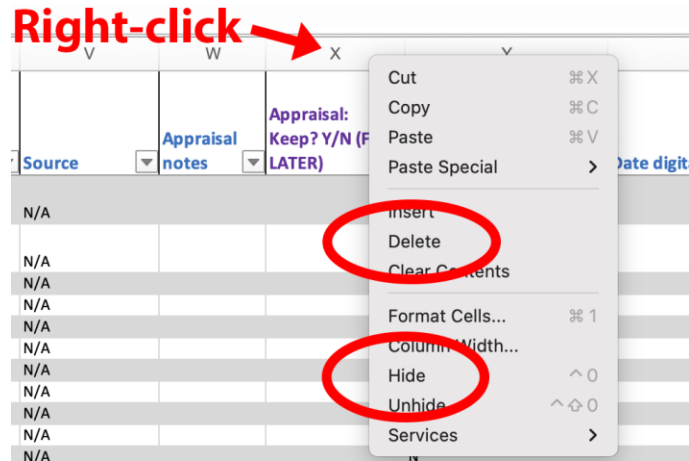
Control Lists in Columns:

If you have a list of values that you want to enforce for certain columns during your inventory, then you can use something called "data validation". Trust us – it's pretty simple, and very helpful. You just need to select the cells in the table that you want people to only add certain information. Select the "Data" tab at the top of the screen, and then click on "Data Validation".
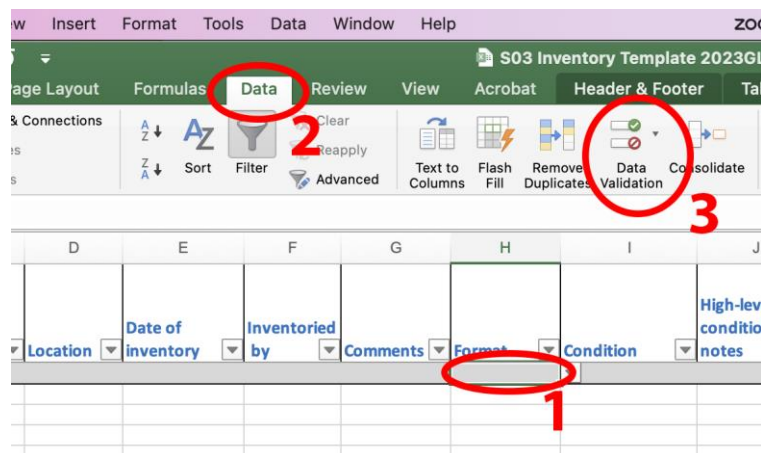
Note: As there's only one row in the table at this point you only have to select one cell. As you add information to the next row down, it will become a part of the "Table" and also get the "Data Validation" rule that is created.
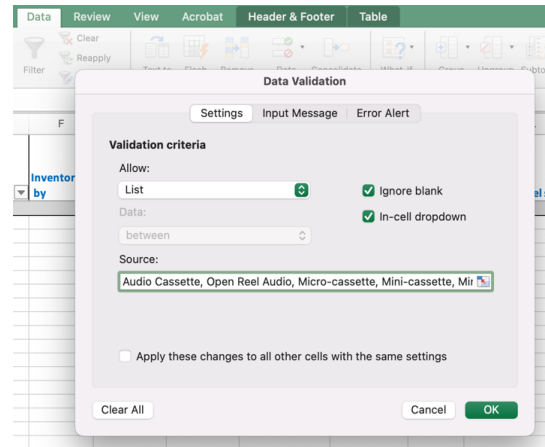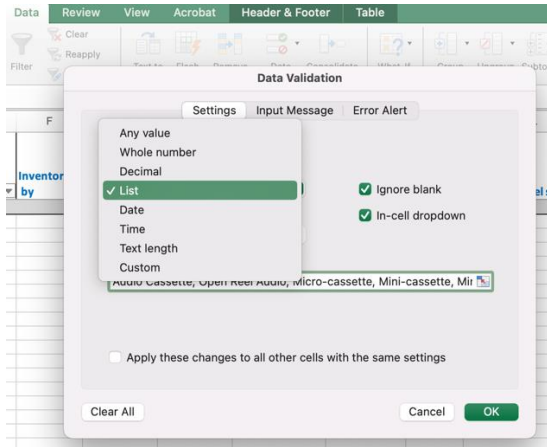
Now select the type of rule that you want to impose on this column. In our example we are creating a "List" of valid entries. This is a list of the formats that we are counting. If you also put a check in the "in-cell dropdown" box it will enable a dropdown list of you authorized values in the affected cells (as seen in the example below). In the "Source" textbox type in your control-list of terms, separated by commas.
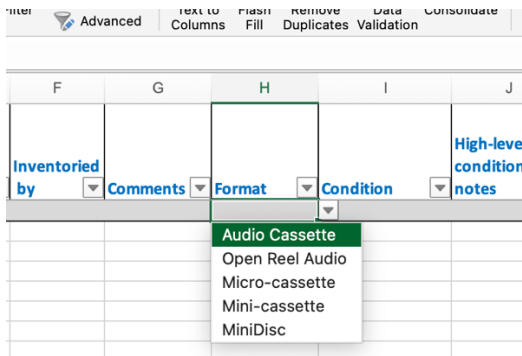
By restricting data entry to this list, we prevent spelling errors, or alternate terms for types of media. By having very consistent data we can then automatically count the tapes of each format with high accuracy.

	A	B	C	D	E	F	G
1					Condition		
2	**Audio Formats**	**Count**	**Runtime**	**Good**	**Average**	**Poor**	
3	Audio Cassette	20	1440	14	3	3	
4	Open Reel Audio	21	630	18	1	2	
5	Micro-cassette	5	390	0	3	2	
6	Mini-cassette	0	0	0	0	0	
7	MiniDisc	5	370	5	0	0	
8	**Total Audio Tapes**	**51**					
9							
10					Condition		
11	**Video Formats**	**Count**	**Runtime**	**Good**	**Average**	**Poor**	
12	VHS	10	330	5	4	1	
13	VHS-C	3	90	3	0	0	
14	Betamax	0	0	0	0	0	

During inventory

Original/existing identifier

If your tapes have had identifiers (IDs) assigned at some point in the past then it is important to keep that relationship, in case people have created other related resources, such as transcriptions referencing that ID. This information is helpful in determining if you need to assign new identifiers to all of your media, or if existing identifiers will suffice. This information is most useful when migrated to a Collection Management Spreadsheet, or database, in order to continually track, and update, information about your recordings.

Identifying the tape format

We will offer some visual guidance here on identifying different media formats. There are many detailed resources available online that can better help you to understand the differences between these formats. Some of these come from the Canadian Conservation Institute, the USA National Archives and the Smithsonian Institution to name a few. Please reference the images below to identify common media formats and use the internet links below to access additional resources.

| Audio Cassette (Compact Cassette) | Open Reel Audio | Micro-cassette | Mini-cassette | MiniDisc |

| VHS | VHS-C | Betamax | 8mm (Video8/Hi8/Digital8) | MiniDV |

Although we do not have resources for these media types, you may also come across two other video formats. ½" open reel video, also known as eiaj video was used in the 1970s. Although there is not a lot of this type of media in community, it is common enough that we get questions about these tapes a few times per year. U-matic tapes are a 3/4" cassette format that was used mainly in the late 1970s. Playback equipment is not common or easy to service for either of these formats. As there are still facilities that can transfer these tapes we recommend outsourcing digitization in the near future.

EIAJ Open Reel Video   U-matic Video Cassette

Condition

Most media have been stored in reasonable conditions and has not been exposed to high humidity or temperature variations. For this reason, we find that most analog tapes are in fairly good condition for their age. It is very helpful to know if your collection is generally in good condition, or if there is a significant portion of your media that may need some attention to be safely digitized. In this field just record if the audio or video-tape is in "good", "average" or "poor" condition.

- If the media has no visible issues, then it would be considered to be in "good" condition,
- if it may have some wear to the case, or shell but otherwise is fine, then it would be considered "average" condition
- if there are more concerning problems such as mould growth, or broken tape that would require repair, then the tape would be considered to be in "poor" condition.

Information written on containers

It is very common for the audio, or video cassettes from a program, project or donor to arrive in a container. This could be a cardboard box, a box lid, a plastic tub, or even a garbage bag. During inventory, you will ideally be removing cassettes from imperfect containers and placing them on a shelf or in a dedicated storage box. However, there can be valuable information written on the container. Sometimes, the cassettes have nothing written on them and the information on the container is the only identifying information about the recordings. It is key that information from the container is linked to the cassette before the two are separated. The inventory templates include a field called "Container information" where you can write down any descriptive information from the container.

Paper documents in the case

It is common to find notes or larger paper documents folded up and tucked into the case. At the inventory stage, make a note in the "Comments" field of your inventory template and leave the documents in the case. The ==*Describing and Managing Collections*== and ==*Condition Assessment*== guides contain guidance on how to handle these documents later.

If the note is short and helps you understand the content or context of the tape, your organization might decide to transcribe the note into the "Comments" field. Use your judgment and the preference of your organization when making this decision.

Identifying possible sub-collections

The inventory templates include a field called "Sub-collection/series/project." As you move through inventory, you will likely find that there are relationships among some of

the tapes. These groups often share a narrative and access protocols. You will find that some tapes belong in a group together because they document a specific activity (for example, Council meetings) or event, or because they were part of the same research project. In this guide, we call these groups **sub-collections**, but some organizations might call them **series** or use another term entirely.

There are many kinds of sub-collections, and how you identify sub-collections and group tapes in your collection is up to your organization's management. It's a good idea to discuss this before starting inventory, but often you won't have full clarity until after inventory is complete. You will likely discover the relationships among your tapes as you go through inventory. Use the "Sub-collection/series/project" field to identify possible relationships.

Appraisal Notes/Appraisal

In archives, **appraisal** is the process of deciding what to keep permanently and what to eliminate from your collection. This is different from monetary appraisal. Archival appraisal is about determining the value of a given tape to your community. Appraisal decisions will vary from community to community.

Appraisal can be complex, and there is no need to make appraisal decisions during inventory. However, you can use the "Appraisal notes" column in the inventory spreadsheet to make recommendations or record your thoughts about a tape's relevance to your overall collection. Often, commercial recordings that exist in many copies in many organizations can be weeded out, but again, this decision is specific to each organization and community. Final decisions should be made by the manager of your collection in consultation with other staff and community members, as appropriate.

Performing the inventory

1. Plan for what information you will collect during inventory (information such as format, runtime (length), description, sub-collection, participants etc…)

   Modify the inventory spreadsheet template to reflect information that you would like to collect during the inventory. Delete, or hide, fields that you won't be using. Re-order the fields if you think that certain information should be recorded earlier or later in the inspection process. Try to prioritize information that is helpful to make "next step" decisions about managing the collection.

2. Plan for what processes you want to do during the inventory (optional)
   - Adding temporary, or permanent identifiers, or containers/shelves/tapes
     - Choose a format for temporary, or permanent identifiers.
       We recommend simple ID formats such as T001, T002… for temporary labels. Add a format component to the ID if inventorying many formats at once. For example, use T-CC001 for audio cassette (CC for "Compact Cassette") and T-RR001 for open reel (RR for "Reel to Reel").
     - To create a system for permanent identifiers please consult the *Describing and Managing Collections Guide*.
   - Placing tapes into containers, or replacing mismatched or unsound containers with better containers
   - Adding cases to audio/video-tapes without cases
3. Collect needed supplies (masks, gloves, labels, pens, archival containers, replacement cases). Refer to the Digitization Supplies Guide for helpful information.
4. Clear space to comfortably examine and count audio and video tapes. Have enough table space for the container (box), a space to examine individual tapes, and a space to place the tapes after they have been inventoried.
5. Bring the tapes out one container, or shelf, at a time (for items that are on shelves use a sturdy container to transport)
   - Label the container or shelf
   - Examine tape
     i. Add label (or temporary label) to tape
     ii. Record information on your Inventory Spreadsheet
        ContainerID, TapeID, any other fields that are needed or obvious.
        Note: you generally don't need to take too much time with any specific tape. There will be opportunity to add more detail later.
   - Repeat for all tapes in the container
6. Repeat for all containers and shelves
7. Sort the spreadsheet data as desired

After inventory

Making your data consistent

During your inventory, you should try to make sure that you input your information in a very consistent way. Even if you are quite careful, the Excel program can be seemingly unpredictable in formatting your data. Excel treats text and numbers very differently.

One of the biggest issues you will find is where you have input a number for the "runtime" of a tape (i.e. 90 for a 90-minute cassette tape) and it is stored as a textual value. If this is the case then that numeric value will not be included when the "total runtime" is added up. You should visually notice a green triangle in the upper-left corner of a cell that has this (or another) issue. When you click on the cell a yellow alert button will appear. When that is clicked a pop-up menu will show that lets you know what the actual issue might be. If you select "convert to number" then that value will be changed to a "number" and will properly be included in math calculations.

Making your data work for you

Once you have completed your inventory, you should have a clearer sense of what formats and content or subject matter your collection encompasses. You may also have identified tapes that you don't want to keep permanently.

The Inventory Spreadsheet Template is formatted as a "table". This means that all of the data that you enter can be easily sorted or "filtered". By clicking on the down arrow in the header row (2nd row), you will be presented with options to sort alphabetically (ascending or descending), or filter by the information in the cell. Filtering means that you can select only cells that contain specific information (such as by format, runtime or sub-collection).

Here are some examples of how to filter your inventory spreadsheet to answer the questions given at the beginning of this guide. This will assist you in setting priorities for digitization, planning for digitization projects, and writing grant applications. The examples are based on the sample data in the inventory templates.

How many tapes do I have?

In order to determine how many total audio, or video tapes you have just click on the "Totals" tab in the Inventory spreadsheet. Here there is a small chart that automatically totals the number of tapes that have been inventories of different formats.

	EM-OR-03	2021-03-09	EM		Open Reel Audio	Good
	EM-OR-04	2021-03-09	EM		Open Reel Audio	Good
	EM-OR-05	2021-03-09	EM		Open Reel Audio	Good
	EM-OR-06	2021-03-09	EM		Open Reel Audio	Good
	EM-OR-07	2021-03-09	EM		Open Reel Audio	Good
	EM-OR-08	2021-03-09	EM		Open Reel Audio	Good

| | Audio | Video | Totals | + |

1				
2	**Audio Formats**	Count	Runtime	C
3	Audio Cassette	20	1050	
4	Open Reel Audio	21	630	
5	Micro-cassette	5	0	
6	Mini-cassette	0	0	
7	MiniDisc	5	370	
8				
9	**Video Formats**	Count	Runtime	F
10	VHS	10	330	
11	VHS-C	3	90	
12	Betamax	0	0	
13	MiniDV	6	720	
14	8mm Video Tape	8	960	
15				
16				

What is the runtime of the tape, or written detail of recording duration?

If you enter the "runtime" of your tapes as a number (i.e. 60, 90 or 120) instead of as a range (i.e. "90 – 120") then the inventory template spreadsheet can total the runtime for you. If these runtimes are entered as ranges, then they will require manual total calculation.

Note: we recommend entering the runtimes as specific numbers, and making an educated guess for the runtimes that you do not know. It is better to have a good estimate of the total runtime of your collection, than to have several tapes not represented in the calculation.

What are the prominent sub-collections?

In order to compare the different sub-collections found during the inventory process you can sort the "Sub-collection/series/project" column alphabetically. Just click on the triangle in the column header and select the "Ascending" button in the "Sort" section of the menu.

The sample data in the **Sub-collection/series/project** column shows that *Fisheries dept. Meetings and Stuff* is a likely sub-collection.

Where are the tapes?

In order to determine where each tape is just look at the "Location" column for the row of the audio or video-tape in question.

The location of the tapes can be seen in the **Location** column.

When were the tapes recorded?

In order to determine when each tape was recorded just look at the "Date Recorded" column for the row of the audio or video-tape in question. Keep in mind that this information may be unknown at this time.

Recording dates can be seen in the **Date recorded** column, and can be used to identify tapes that might be especially vulnerable due to age, or especially valuable due to to the time period they document.

What is the ownership or access status of the tapes?

In order to compare the different ownership, or access concerns of the collection, you would start by sorting the "Sub-collection/series/project" column, then sort the "Appraisal Notes" column. Next examine the "Appraisal notes" column to find any notes associated with ownership or access protocols. Keep in mind that this information may not be available, or collected during the inventory process. If information is available, then you might find groups of tapes that should be returned to an owner and should not be digitized. Other groups of recordings may have no access restrictions and would be good candidates for your next digitization project.

In this example, the **Appraisal notes** column has been filtered to show tapes that are likely personal to the donor. In this case, the organization may wish to return the tapes to the donor rather than keep them in the archives.
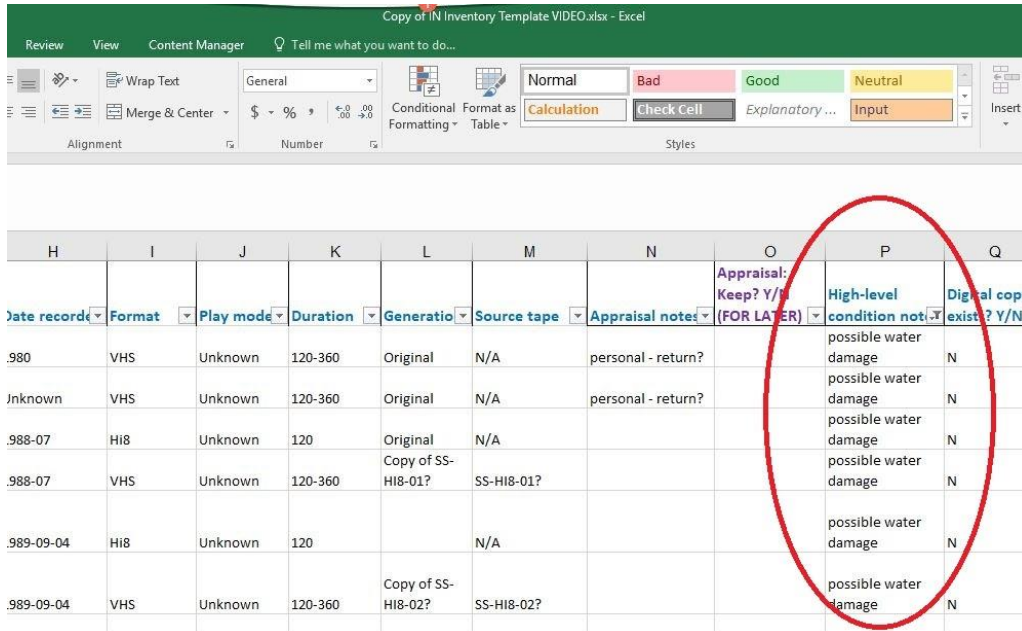

In this example, data in the **Title/Description of contents** and **Participants** column can be reviewed to identify tapes that may have ownership or access concerns due to content.

What condition are the tapes in?

Typically, you will want to know what the overall condition of your collection is, instead of the condition of a single tape. Start by sorting the "Condition" column to arrange the tapes by their general physical condition. By simply observing what part of your collection is in poor condition, you can determine your tapes are particularly at-risk, or if digitization, and other procedures will take longer than normal.

In this example, the **High-level condition notes** column has been filtered to show tapes with condition concerns - in this case, possible water damage. This information can be used to prioritize which tapes require more urgent action.

You can also review the titles and content descriptions with your collections manager to identify tapes your organization doesn't want to keep permanently. Set these aside and enter "N" in the "Appraisal: Keep? Y/N" column so you have a record of the decision. Likewise, enter "Y" for the tapes you know you are keeping.

If you are finished with your inventory and now know what you have and where it is, congratulations! You are ready to move forward with more in-depth collections management activities and digitization project planning.

Inventory Template fields

Most of the fields appear on both the audio and video templates, but some fields are specific to audio or video. This is noted in the third column of the table below.

Field name	Field description—how to fill in the field	Audio or video template?
Permanent unique identifier (FOR LATER)	Record the permanent identifier when you assign it (once you know you want to keep the tape in your collection permanently).	Both
Temporary identifier	Assign a temporary identifier at inventory (such as T01, T02 or T-VHS01, T-VHS02). Write the temporary identifier on a sticker and place it on the spine of the tape's case.	Both
Original/existing identifier (if present)	Any identifier already on the item (may be present if there have been previous attempts to catalogue the collection). If none, leave blank.	Both
Location	Box, container, and/or shelf number, as determined by your organization.	Both
Date of inventory	Enter date of inventory in a format of your choice (be consistent).	Both
Inventoried by	Name of person carrying out inventory.	Both
Format	Enter the format of the tape. Use a controlled vocabulary (that is, select a term to use for each format, and use the same term each time). That way, you can sort and filter by format. Audio: Open Reel Audio, Audio Cassette, Micro Cassette, Mini Cassette, MiniDisc Video: VHS, VHS-C, Betamax, 8mm, MiniDV etc. Make sure you are consistent in entering format names.	Both
Condition	Enter "Good", "Average", or "Poor" to indicate the general condition of the tape.	Both
High-level condition notes	If desired, enter anything condition-related noted at inventory, such as "strong waxy odour" or "mould present."	Both
Comments	Enter any additional notes.	Both
Runtime (duration)	Cassettes: enter, in minutes, the advertised runtime of the cassette if it is indicated. If there is no runtime given then you can estimate the runtime (if you feel confident from seeing many cassettes), or enter "unknown". Open reel: Unless clearly marked on the label, enter	Both

	"unknown". You can't know the runtime of an open reel tape unless you also know the length of the tape, the recording speed and the recording track-pattern.	
Play mode or Speed	Enter the play mode for VHS video if this is indicated. Play mode refers to the speed at which the VHS video was recorded and is abbreviated SP (standard play), LP (long play), and EP/SLP (extended play/super long play). A VHS tape labelled "T-120" could hold two hours of content in SP, four hours in LP, and eight hours in EP. This is useful for estimating the duration of the recording. If not indicated, enter "Unknown."	Video only
Open reel: Reel size	If ¼" open reel audio, enter reel diameter in inches. Common sizes are 3", 5" 7" and 10.5". For cassettes, enter "N/A."	Audio only
Open reel: Recording speed	For open reel audio, enter the recording speed if indicated on the container or reel. This information is usually expressed in inches per second (ips). It is useful for estimating the duration of the recording. Common recording speeds are 1⅞ ips, 3¾ ips, 7½ ips, and 15 ips. If not indicated, enter "Unknown." For cassettes, enter "N/A."	Audio only
Open reel: Track configuration	For open reel audio, enter the track configuration if indicated on the container or reel. "Track configuration" refers to the way the recorded audio is laid out on the magnetic tape, and this information is useful for estimating the duration of the recording. Common track configurations are quarter track, half track, and full track. If not indicated, enter "Unknown." For cassettes, enter "N/A."	Audio only
Title/description of contents	Record the title/any description of the contents of the tape found on the case (spine or cover) or on the cassette or reel.	Both
Participants	Record the names of people and/or groups featured in the recording. Use this field for easier sorting/filtering by participant name. To make sure you can sort/filter effectively, your organization should decide on a consistent way of entering names. Some organizations use LAST NAME, FIRST NAME while some prefer FIRST NAME LAST NAME. The most important thing is that you are consistent.	Both
Sub-collection/series/ project	If known, enter the title or a brief description of the project/series/group to which the tape belongs. If none (the tape is stand-alone), enter "None." If unknown, enter "Unknown."	Both
Donated by	Enter the name of the person or organization that donated the tape to your archives.	Both

Container information	Write down any information from the container (the box, tub, bag, etc. that the tape arrived in) that helps identify the tape.	Both
Date recorded	Enter the date of recording, if known. It is important to be consistent in how you format dates. Examples include "Jan. 1, 2020," "January 1, 2020," or "2020-01-01." If you only know the year (2020) or month and year (Jan. 2020), just enter the information you have. If the date is a range (2017–2020), enter the range.	Both
Generation	"Generation" refers to whether the tape is an original recording or a copy. If it is a copy, it indicates how far away from the original it is (second-generation copy, third-generation copy). This is important information because it is best to digitize originals if possible. Use a controlled vocabulary (the following terms): Original, master, duplicate, copy, unknown.	Both
Source	If the tape is a duplicate, identify the tape from which the duplicate was made. If the tape is an original or master, enter "N/A."	Both
Appraisal notes	Appraisal is the process of deciding what to keep permanently and what to eliminate from your collection. If desired, record any thoughts about the content's relevance to your overall collection. This is mostly a place to flag tapes you think you might *not* want to keep.	Both
Appraisal: Keep? Y/N (FOR LATER)	This field may be filled in on the spot, or it may be filled in once appraisal decisions have taken place after the inventory. This is a place to keep track of which tapes were ultimately kept and which were culled.	Both
Digital copy exists? Y/N	Some organizations may have already digitized some of their tapes. They may want to track that information in the inventory spreadsheet if they don't have a separate collections management spreadsheet or database. If this inventory is the first time your organization is going through your collection systematically and you have never digitized any of your collection, do not use this column.	Both
Date digital copy created	If the tape is already digitized, enter date of inventory in a format of your choice (be consistent). If inventory is the first time your organization is going through your collection systematically and you have never digitized any of your collection, do not use this column.	Both
Name of resulting file	Enter the name of the resulting digital file, including file extension (.wav, .mp3).	Both

Digital copy file format	Enter the format to which the tape was digitized. This column is optional because the information is already captured in the "Name of resulting file" column. Use this column for easier sorting and filtering by file extension, if desired.	Both
Transcribed? Y/N	Enter whether or not the contents of the tape have been transcribed. If unknown, enter "Unknown."	Both
Related materials	Make a note of any related paper documents, such as interview agreement forms, researcher contracts, or related media items.	Both
Location of related materials	If related materials exist, enter their location. Be consistent in how you identify locations (for example, "green filing cabinet" or "Jana's desk.")	Both