Processing Action Record

I. Accession

Main Entry: _____

Collection Name:_____

Inclusive Dates:_____Accession Number:_____

Amount of Material:_____Manuscript Number:_____

Restrictions:_____

II. Preliminary Processing

1. General Type of Material: (office files, personal papers, organizational papers, etc.)

2. Current/proposed arrangement: (Evaluate the current arrangement of the collection. Are the files in alphabetical, chronological, numerical or some other order? What is the proposed arrangement?)

3. Multiple series: (Does the collection contain more than one type of record series? If possible, try to list the series that the collection will be divided into and discuss with the Archivist)

4. Records accessibility: (What level of arrangement will be needed to make the records accessible for public use?)

5. Proposed level of arrangement: (To what level will the collection be arranged. The four levels of arrangement are collection level, box level, folder level or item level).

6. Proposed preservation during processing (What preservation actions are proposed? Remember that some preservation actions are tied to the level of arrangement.)

7. Estimated processing time

Accessioning:	Description Actions
_____Assign an accession number	_____Described to what level (collection, box, folder, item)
_____Create entry in accession database	_____Draft finding aid in EAD
_____Prepare Donor/Collection folder	_____Draft of finding aid reviewed by Archivist
Preliminary Inventory:	_____Revisions completed for finding aid.
_____Establish preliminary inventory	_____EAD document converted to HTML and linked to web page
_____Label containers with accession number and name of collection (curatorial area)	_____Link to finding aid_____
Pre-Processing:	_____Hard copy of finding aid placed in reference room binder
_____Review Deed of Gift	_____Draft MARC record created
_____Write proposal for processing for Archivist to review	_____MARC record input into Voyager and reviewed
	_____Bibliographic Number _____
	_____MARC record entered into OCLC
	_____OCLC Number_____
	_____Catalog Department uploaded MARC record into OCLC
	_____Copy of GIL and OCLC record/s placed in collection file
Physical arrangement:	**When project is completed, the curator must:**
_____Basic preservation (surface cleaning, etc.)	_____Verify finding aid is on web
_____Boxes replaced with lignin-free boxes	_____Place donor/collection file in appropriate file cabinet
_____Folders replaced with lignin-free folders	_____Update accession database
_____Folders stamped and labeled in pencil	
_____Materials repaired	
_____Fasteners removed and replaced	

_____Duplicates removed (note if they were transferred or destroyed) _____Photocopied all clippings, thermo-fax, etc. onto bond paper _____Boxes labeled _____Boxes shelved _____Location guide updated	