Cumbria Local History Federation: Managing your archives guidance

Handout 1: Accessioning

About us

The Cumbria Local History Federation (CLHF) was formed in 1992 by a group of organisations and individuals keen to provide a focus in the County for local historians and local societies. The role of the CLHF is primarily in communication and information, promoting its member societies and their work, providing a means of co-operation and the exchange of ideas, and connecting its members with relevant resources and information. Where appropriate, the CLHF provides publications and organises events.

CLHF, thanks to a generous anonymous donation and a grant from the Cumberland and Westmorland Antiquarian and Archaeological Society, has delivered archives training and assistance in partnership with Cumbria Archive Service for member groups which hold archives As part of the training, CLHF has created these short guides on managing archives. This guide covers taking in new archives (accessioning).

Background

An accession is when a group of archives is transferred to an archive from the same source at the same time. The formal receipt of an accession will usually be documented in an Accessions Register.

Top tips

- Use an accession form to record details about the accession, including the transfer of ownership. Complete the form with the depositor or donor. Norfolk Archives have developed a good accession form template (see below).
- An accession form also includes information as to whether the archive is a loan or a donation. For most community archives, it will be easier to take archives as a donation.
- Record details of the accession in an Accession Register. The National Archives and Norfolk Archives have developed good templates for what fields should be included in an

Accessions Register (see below) This could be a hard copy or digital (e.g. an Excel document).

- Remember to record the location (e.g. the room or shelf) of the accession in the Accession Register.
- Once accessioned you may want to consider cataloguing the accession in more detail at a later date (see Handout 2).
- Does the material fit your collection policy? If not, can you offer elsewhere? If the material seems to be 'special categories' (government/local government/school/church/manorial/tithe) seek further advice

Further reading and guidance

- TNA: first principles of archives for non-archivists (2016): https://cdn.nationalarchives.gov.uk/documents/archives/archive-principles-and-practice-an-introduction-to-archives-for-non-archivists.pdf
- NorfolkArchives, what to consider before accepting collections (2021): https://www.archives.norfolk.gov.uk/community-archives/collections-management/what-to-consider
- Cumbria Archives Service. (2019). *Terms of agreement for the deposit of records.* https://cumbria.gov.uk/elibrary/Content/Internet/542/795/42136122121.PDF
- Gloucestershire Archives. (2021). *Collections Management 2: taking in new material (accessioning)* https://www.heritagehub.org.uk/heritage-hub-online-training/online-collections-management-training/collections-management-2-taking-in-new-material-accessioning/#main
- Hampshire Archives. (2021). *Collecting archives.* https://www.hants.gov.uk/librariesandarchives/archives/services/community-archives/collecting-archives
- Norfolk Archives. (2021). *Accessioning: adding items to your community archive.* [includes templates for an accessions form and accessions register]. https://www.archives.norfolk.gov.uk/community-archives/collections-management/accessioning
- The National Archives. (2022). *Loan agreements and accessions registers.* https://www.nationalarchives.gov.uk/archives-sector/advice-and-guidance/managing-your-collection/documenting-collections/loan-agreements-and-accessions-registers/

Cumbria Local History Federation: Managing your archives guidance

Handout 2: Cataloguing

About us

The Cumbria Local History Federation (CLHF) was formed in 1992 by a group of organisations and individuals keen to provide a focus in the County for local historians and local societies. The role of the CLHF is primarily in communication and information, promoting its member societies and their work, providing a means of co-operation and the exchange of ideas, and connecting its members with relevant resources and information. Where appropriate, the CLHF provides publications and organises events.

CLHF, thanks to a generous anonymous donation and a grant from the Cumberland and Westmorland Antiquarian and Archaeological Society, has delivered archives training and assistance in partnership with Cumbria Archive Service for member groups which hold archives As part of the training, CLHF has created these short guides on managing archives. This guide covers cataloguing.

Background

Cataloguing involves creating a list describing the archives you have collected or created. Cataloguing will make it easier for you to make them accessible and preserve them.

Top tips

- Something is better than nothing - cataloguing is time-consuming and it is easy to feel overwhelmed. Consider prioritising what you catalogue first, and you do not have to describe every item in great detail.
- Use a cataloguing template – The Community Archives Group and Gloucestershire Archives have developed good templates (see below).

- Train volunteers in cataloguing or follow best practice. The Community Archives and Heritage Group, Gloucestershire Archives, and Norfolk Archives have created good guidance and online training.
- If you are cataloguing digital archives you should think about capturing technical details about the files such as file names, file paths, sizes, file format, and last modified date. There is software that can capture this for you.
- Capturing copyright information can be important, particularly for photographs, so you will need to think how this is recorded in the catalogue (see Handout 3 for more detail).

Further reading and guidance

- Archives Hub. (2022). *Indexing standards.*
  https://archiveshub.jisc.ac.uk/indexingstandards
- Community Archives and Heritage Group. (2017). *Cataloguing guidelines for community archives.*
  https://www.communityarchives.org.uk/content/resource/cataloguing-guidelines
- Gloucestershire Archives. (2021). *Collections Management 5: cataloguing your collection* [includes a template].
  https://www.heritagehub.org.uk/heritage-hub-online-training/online-collections-management-training/collections-management-5-cataloguing-your-collection/#main
- The National Archives. (2020). *Digital Preservation Workflows: Ingest* [Step 2.1 Understand what you have, cover capturing technical information about digital archives].
  https://www.nationalarchives.gov.uk/archives-sector/projects-and-programmes/plugged-in-powered-up/digital-preservation-workflows/2-ingest/
- Norfolk Archives. (2021). *Cataloguing.*
  https://www.archives.norfolk.gov.uk/community-archives/cataloguing
- Norfolk Archives. (2021). *Making a box list.*
  https://www.archives.norfolk.gov.uk/community-archives/collections-management/making-a-box-list

Cumbria Local History Federation: Managing your archives guidance

Handout 3: Copyright and data protection

About us

The Cumbria Local History Federation (CLHF) was formed in 1992 by a group of organisations and individuals keen to provide a focus in the County for local historians and local societies. The role of the CLHF is primarily in communication and information, promoting its member societies and their work, providing a means of co-operation and the exchange of ideas, and connecting its members with relevant resources and information. Where appropriate, the CLHF provides publications and organises events.

CLHF, thanks to a generous anonymous donation and a grant from the Cumberland and Westmorland Antiquarian and Archaeological Society, has delivered archives training and assistance in partnership with Cumbria Archive Service for member groups which hold archives As part of the training, CLHF has created these short guides on managing archives. This guide covers copyright and privacy.

Background

It is important to ensure you have the correct permissions in place to ensure you can share your archives, make them accessible, and preserve them.

Top five tips

- Train volunteers in copyright so they understand the basics. There is some good training and guidance online (see below).
- If you are digitising archives held by individuals, then ensure you have an agreement that captures information about ownership and copyright - you will need their permission to re-use the archives.
- In terms of privacy, you should also consider the impact on people of their name in a catalogue or photograph being made available online. Photographs often depict special categories of personal data: medical treatment, arrests, protests/demonstrations.

- For oral history, use agreements with interviewees which cover consent, copyright, and data protection. The Oral History Society have created good templates (see below).
- If you are making archives available online ensure you have a takedown policy that covers copyright and data protection. The Recording Morecambe Bay website has a good example (see below).

Further reading and guidance

- Morecambe Bay Partnership. (2018). *Copyright and license* [includes an example of a takedown policy].
  https://www.recordingmorecambebay.org.uk/content/about/legal-and-technical/copyright-and-license
- The National Archives. (2022). *Copyright and related rights* [includes some good flow charts to help understand copyright].
  https://cdn.nationalarchives.gov.uk/documents/information-management/copyright-related-rights.pdf
- The National Archives. (2018). *Guide to archiving personal data*. [see pp.29-34 in particular].
  https://cdn.nationalarchives.gov.uk/documents/information-management/guide-to-archiving-personal-data.pdf
- Norfolk Archives. (2021). *Permissions: ownership and rights.*
  https://www.archives.norfolk.gov.uk/community-archives/digitisation/permissions
- Oral History Society. (2019). *Being legal and ethical.*
  https://www.ohs.org.uk/legal-and-ethical-advice
- Scottish Council on Archives. (2021). *Understanding copyright webinar series.*
  https://www.scottisharchives.org.uk/latest/news/understanding-copyright-webinar-series

Cumbria Local History Federation: Managing your archives guidance

Handout 4: Digitisation

About us

The Cumbria Local History Federation (CLHF) was formed in 1992 by a group of organisations and individuals keen to provide a focus in the County for local historians and local societies. The role of the CLHF is primarily in communication and information, promoting its member societies and their work, providing a means of co-operation and the exchange of ideas, and connecting its members with relevant resources and information. Where appropriate, the CLHF provides publications and organises events.

CLHF, thanks to a generous anonymous donation and a grant from the Cumberland and Westmorland Antiquarian and Archaeological Society, has delivered archives training and assistance in partnership with Cumbria Archive Service for member groups which hold archives As part of the training, CLHF has created these short guides on managing archives. This guide covers digitisation.

Background

Digitisation involves creating a digital copy of an archive such as a document or photograph, usually using a scanner or camera. In some cases, local history societies will be digitising archives held by other individuals/groups. Following best practice and standards will ensure the digital images can be shared, made accessible, and preserved.

Top five tips

- Before you digitise archives, you should have permission to do so – from the owner and copyright holder (see Handout 3 for more detail). Also, consider any preservation requirements.
- If undertaking digitisation inhouse, ensure you have good equipment – Cumbria Archives Service will be able to advise on this.
- Train volunteers in digitisation or follow best practice. There is good guidance and training available online (see below).

- In particular, make sure you digitise using the correct format and resolution. For example, use .tiff format (minimum of 300 DPI) for images. You may also want to create .jpeg access copies.
- Make sure the naming system you use with the digital image files relates to the reference number of the original item.
- Some formats such as sound and film may require digitisation by a specialist company or archive service. Cumbria Archives Service can advise on this, and the North West Film Archive can provide specialist advice on film digitisation.

Further reading and guidance

- Gloucestershire Heritage Hub. (2021). *Collections Care 16: preparing for digitisation.* https://www.heritagehub.org.uk/heritage-hub-online-training/online-collections-care-training/collections-care-16-preparing-for-digitisation/#main
- Hampshire Archives. (2021). *Digitising archives.* https://www.hants.gov.uk/librariesandarchives/archives/services/community-archives/digitising-archives
- National Library of Wales. (2017). *Digitisation Guidelines.* People's Collection Wales. https://www.peoplescollection.wales/sites/default/files/ps-digitise.pdf
- Norfolk Record Office. (2021). *Digitisation.* https://www.archives.norfolk.gov.uk/community-archives/digitisation

Cumbria Local History Federation: Managing your archives guidance

Handout 5: Digital preservation

About us

The Cumbria Local History Federation (CLHF) was formed in 1992 by a group of organisations and individuals keen to provide a focus in the County for local historians and local societies. The role of the CLHF is primarily in communication and information, promoting its member societies and their work, providing a means of co-operation and the exchange of ideas, and connecting its members with relevant resources and information. Where appropriate, the CLHF provides publications and organises events.

CLHF, thanks to a generous anonymous donation and a grant from the Cumberland and Westmorland Antiquarian and Archaeological Society, has delivered archives training and assistance in partnership with Cumbria Archive Service for member groups which hold archives As part of the training, CLHF has created these short guides on managing archives. This guide covers digital preservation.

Background

Digital archives can be easily shared and copied and take up no physical space. But the very characteristics which make them so convenient also present risks and challenges.

Top tips

- Be organised - keep digital archives in a sensible folder structure which keeps related items together and provides meaningful context. Ensure the archives are catalogued (see Handout 2).
- For storage, avoid using media such as CDs/DVS/pen drives. Use hard-drives instead and ensure you have copies in at least another two separate locations such as cloud storage or a portable hard-drive. The Preservica Starter Edition digital preservation software provides 5GB of storage for free.
- Restrict access to avoid accidental deletion or changes - password protect your computer or cloud storage.

- When undertaking digitisation or creating oral histories ensure you use the correct file formats - .tiffs for images and wav format at a minimum quality of 44.1khz 16 bit for oral history (see Handout 4 for more detail).
- If you have created a web site for a project or your archive, nominate it to the UK Web Archive for archiving.

Further reading and guidance

- Community Archives and Heritage Group. (2018). *Digital preservation for community archives.* https://communityarchives.org.uk/wp-content/uploads/2018/02/Digital-Preservation-for-Community-Archives-V1.4-2018.pdf
- Gloucestershire Archives. (2021). *Online digital preservation training.* https://www.heritagehub.org.uk/heritage-hub-online-training/online-digital-preservation-training
- Preservica. (2022). *Preservica Starter Edition*. https://starter.preservica.com
- Digital Preservation Coalition (UK): Digital Preservation Handbook
- National Digital Stewardship Alliance (USA): Levels of Digital Preservation
- UK Web Archive. (2021). *Save a UK website.* https://www.webarchive.org.uk/en/ukwa/nominate

Technical tools

- Karen's Directory Printer (alternatively CTRL+A in selected folder to select all, press SHIFT key and right click and select 'Copy Path', then CTRL+C, CTRL+P to paste in Excel or Libre Office) http://www.softpedia.com/get/System/File-Management/Karen-Directory-Printer.shtml
- Pronom Technical Registry http://www.nationalarchives.gov.uk/pronom
- DROID: file format identification tool: https://www.nationalarchives.gov.uk/information-management/manage-information/preserving-digital-records/droid

Cumbria Local
History Federation

Cumbria Local History Federation: Managing your archives guidance

Handout 6: Digital access

About us

The Cumbria Local History Federation (CLHF) was formed in 1992 by a group of organisations and individuals keen to provide a focus in the County for local historians and local societies. The role of the CLHF is primarily in communication and information, promoting its member societies and their work, providing a means of co-operation and the exchange of ideas, and connecting its members with relevant resources and information. Where appropriate, the CLHF provides publications and organises events.

CLHF, thanks to a generous anonymous donation and a grant from the Cumberland and Westmorland Antiquarian and Archaeological Society, has delivered archives training and assistance in partnership with Cumbria Archive Service for member groups which hold archives As part of the training, CLHF has created these short guides on managing archives. This guide covers digital access.

Background

Providing access to your catalogues and archives online can help widen access and reach new audiences.

Top tips

- Manage Your Collections has been developed by the National Archives and allows archives to add information and catalogues about their own collections onto Discovery for free (see below). Discovery holds more than 32 million descriptions of records held by The National Archives and more than 2,500 archives across the country.
- The National Archives have developed a Digital Engagement toolkit to help archives develop how they use their collections to tell stories online and engage audiences in different ways (see below). This includes using social media and online exhibitions.
- Some free software such as AtoM and CollectiveAccess can help you publish catalogues and content, but they require quite a lot of technical expertise.

- Some community archives use hosted software such as CommunitySites, Preservica Starter Edition, eHive or Omeka.Net to make their collections available online. There is usually an annual subscription for the software, although Preservica Starter Edition and eHive both provide you with some functionality and storage for free.
- Some archive use Flickr to share their photographic collections.
- Remember even if you make your archives online, you will still need to think about digital preservation (see Handout 5).

Further reading and guidance

- The National Archives. (2022). *Manage Your Collections in Discovery.* https://www.nationalarchives.gov.uk/archives-sector/advice-and-guidance/managing-your-collection/manage-your-collections-in-discovery/
- The National Archives. (2022). *Digital engagement toolkit.* https://www.nationalarchives.gov.uk/archives-sector/projects-and-programmes/plugged-in-powered-up/digital-engagement-toolkit/
- The National Archives. (2022). *Cataloguing systems and archives networks* [includes a good list of software systems]. https://www.nationalarchives.gov.uk/archives-sector/advice-and-guidance/managing-your-collection/documenting-collections/cataloguing-and-archives-networks