

AVCC Cataloging Toolkit and Reporting Modules User Guide (Beta)

Get Your Toolkit

1. Visit the METRO Keeping Collections website AVCC toolkit page. Download the User Guide, Format Guide, and FileMaker Database, and follow the information to request a copy of the Google Doc Forms.
2. After receiving e-mail confirmation, use the link to go to Google Drive. Go to File>Make a Copy... to create a new Master form that you control. Re-name as you see fit. If you want to make new, unrelated Forms, follow the same procedure, though you will need to clear out the records that have been copied over to the new form.
3. Click on the Share button to send all catalogers a link to the newly copied and re-named Google Doc, along with any message.

What's In The Toolkit?

- Links to Forms (Audio, Video, Film)
- User Guide
- Survey Format Guide
- FileMaker Database

Forms

Because the Forms are accessible online, catalogers can access them from any browser and enter records simultaneously.

Each kind of media (i.e., film, video, and audio) has its own designated Google Form. While there is some overlap between these, every Form has unique fields that pertain only to the specific media in question. Modules have two parts: The Form used for data entry and the underlying Spreadsheet where records are collected. Each time a cataloger submits a completed record via the Form, the data is compiled in this spreadsheet. Each row corresponds with a single record. Not essentially different from entering records into an Excel document, what AVCC offers is some basic vocabulary controls for fields, recommendations for which fields to capture, and pre-built reports for analyzing data.

The Form itself is split into two pages. The first page contains basic metadata fields while the second page contains more advanced fields. The first five fields are mandatory; this requirement is noted with a red asterisk. These fields represent the bare minimum of information needed to create a record. If information about any other fields is missing, those fields may be left blank, however if fields used for reporting are left blank (Durations, Creation Date, Base, Reel Size) the resulting reports will be incomplete.

To open the Form, click on the Form's name in Google Drive and then the "View live form" button in the header, or click on the Responses spreadsheet link. This action will open the Spreadsheet associated with the Form. To fill out the Form, click "Form" in the upper left-hand corner of the screen and then select "Go to live Form" from the drop-down menu.

User Guide

This document outlines the cataloging process from preparatory work through creating records and compiling the resulting data.

Survey Format Guide

This resource serves as a guide for catalogers with regard to identifying media formats. Participants can match up items with their respective photographs to confirm a particular format and read the descriptions provided in order to obtain more information (years of use, size, etc.)

File Maker Pro AVCC.fp7 File

This file contains templates that your institution can use to configure File Maker Pro and export the data from the Excel spreadsheet. This option is available to institutions that currently own or wish to purchase File Maker Pro; the file does not contain the program itself.

Using the Toolkit

Getting Started

Prior to the cataloging process, your institution must complete some basic preparations.

Defining Location Codes

The cataloged items should be findable after the work has been completed. The institution should define the location codes or descriptions prior to moving items into a common area. The code may refer to a box number, a shelf location, a descriptive statement, an ID, or any other schema that your institution uses to track objects' locations.

Field Formatting

To generate consistent data, your institution should determine how certain fields should be formatted. These fields include:

- Copyright/Restrictions (may include basic statement to limit duplication and who to contact for permissions, or more complex copyright terms or reference links)
- Description (outline what information will go in this field: a description of the object's content, any contextual information pertaining to the content, and/or the provenance of the physical object)
- Contributor (last name, first name; first name, last name, etc.)

To create an institutionally specific controlled vocabulary, your institution should make a list of their Genres (i.e., Documentary Films, Autobiographical Films, Oral Histories.), Subject, Generations, and other fixed terms. To change those open text fields to pick lists:

1. Click on the name of the Form in Google Drive, and then click "Form" and "Edit Form" in the upper left-hand corner of the spreadsheet.
2. Scroll over the field in question until it is highlighted in yellow. Three icons should appear in the upper right-hand corner. Click on the pencil icon; this action will allow you to edit the list.
3. Change Question Type to "Choose from a list" or "Multiple Choice." In the first text box, type three dashes each separated by a space (- - -). This provides Participants with another option if they

cannot readily identify a term. In each of the following text boxes, enter a different term. When you are finished, click “Done.”

Data Entry Tips

The final reports rely upon the information gathered during the cataloging process.

When important information like duration, format, etc. are not captured, the reports generated will be inaccurate, and ultimately less useful to your institution. The more information catalogers are able to enter into the Form, the more comprehensive the final reports will be. Therefore if a piece of essential information is missing it is always better for catalogers to make an educated guess rather than leave a field blank.

This means that catalogers should not approach their task as a process of directly transcribing the information contained within the object itself. Even if the precise information is not known for a given field, catalogers will usually be able to fill in the blank with a reasonable guess by using a combination of common sense and their knowledge of the collection as a whole.

Oftentimes consulting other fields within the Form can help catalogers make these estimates. For example, if there is no indication of the content's duration, the information contained within the Media Duration field coupled with an understanding of the collection's content will allow catalogers to make an acceptable estimate.

Once you click “submit,” your response will be recorded. If you have another audio item, you may click “submit another response.” If not, close the window and open the form for the corresponding media format.

1. If you're entering records of materials with a field that is the same for multiple or all records (i.e., all items are the same format, all items are from the same collection, all items have the same diameter and base, etc.) it may be more time efficient to not enter that information in the form, but rather enter it in bulk by copying and pasting the value directly into the Spreadsheet.
2. Once you make your own copy of a module it is yours to work with and is not linked to any other data set. While you can make adjustments to vocabularies and order based on local practices or needs, some changes may disrupt the reporting in the systems current Google Docs form. The later web-based utility will offer greater personalization.
3. As mentioned elsewhere, though fields such as Durations and Dates are not required to create a record, they are required to enable reporting. There must be a value in them, even if that value is a guess or reasonable estimate. Don't be afraid of making estimates based on previous knowledge of the collection or the likelihood of content being a certain way (i.e., If you're dealing with a radio or television program, you can make a pretty good guess that the content will be approximately 30 or 60 minutes.).
4. Fields like Durations and Dates that are open text should not include extra characters outside of whole numbers and the yyyy/mm/dd format. Standard cataloging practices such as use of question marks and brackets will disrupt reporting.
5. Send more tips and suggestions our way!

Basic and Suggested Fields

The Forms are comprised of a series of free text and drop-down fields. These fields are described below.

Basic fields: All Media Formats

Unique ID: a free text field for a unique number assigned to each object during the cataloging process. This number may be an existing ID number already associated with the object or it may be created from scratch; the Host makes the decision on this matter. When data is collected in the Excel spreadsheet, it is possible to sort the data by Unique ID to check that no two objects share the same number. *This field is required.*

Media Type: a drop-down field that designates whether the record is for an audio, video, or film object. This matters because, 1) certain formats can be used to record either video or audio, and 2) the later planned FileMaker database will use this field for reporting purposes. *This field will be required for later reporting purposes. The requirement is currently turned off.*

Format: a drop-down field that indicates the standard format of an audio, video, or film object. *This field is required.*

Title: a free text field containing the name of the object. If the object is part of a series, has an alternate title, or is a compilation of many titles, the cataloger may choose to account for this information in the Description field. If a title cannot be determined from the object's documentation, (for example, if the object is a completely blank VHS tape), you may choose to assign the title "Unlabeled." *This field is required.*

Storage Location Code: a free text field containing the object's location. *This field is required.*

Collection: a free text field denoting the object's parent collection, if any.

Description: a free text field containing a description of the object's content, any contextual information pertaining to the content, and/or the provenance of the physical object. Your institution will decide what information should be included; this list of requirements will be documented and explained to the catalogers.

Creation Date: a free text field noting the date the object itself was made. In order to maintain consistency and accuracy, the Creation Date field must be formatted according to a formula. Creation Date fields should be formatted yyyy/mm/dd. If the year is not known enter XXXX. If only the year is known enter yyyy/XX/XX. Ranges are acceptable as are time periods (i.e., Fall) as long as they are expressed yyyy first.

Content Date: a free text field noting the date the object's content was created. Just like the Creation Date, the Content Date field should be formatted yyyy/mm/dd. If the year is not known enter XXXX. If only the year is known enter yyyy/XX/XX. Ranges are acceptable as are time periods (i.e., Fall) as long as they are expressed yyyy first.

Media Duration: a drop-down field noting the full capacity of the object. For example, a Betacam SP BCT 60MLA tape has a media duration of 60 minutes. Some more recent digital formats have slightly longer capacities (64 minutes instead of 60). Round down to the nearest, or add new ones if desired.

Content Duration: a free text field noting the run time of the object's content. In order to maintain consistency, Durations should be entered in minutes only, rounding up to the nearest minute.

Genre/Subject: a free text field that categorizes the general nature of the object's content. Your institution will compile a list of relevant genres and subjects. Your institution may choose to create a drop-down list of these terms or to compile a document of the terms and share them with the catalogers.

Contributor: a free text field denoting any person involved with the creation of the object's content. Examples include writers, editors, producers, performers, etc. You may choose to include the person's title along with the name when he or she fills in this field. Your institution will decide how the Contributor field should be formatted; these formatting specifications will be documented and shared with the catalogers.

Generation: a free text or drop-down field that defines the relationship between original material and copies. Your institution will compile a list of the relevant generations; if the collection consists mostly of commercial material, this list may be very short. Your institution may choose to create a drop-down list of these terms or to compile a document of the terms and share them with the catalogers.

Part: a free text field that notes if the object is a piece of a larger work. For example, if a full-length film is broken up into four reels, the catalogers may complete this field as "Reel 1 of 4."

Commercial Unique: a free text field for information pertaining to commercial or unique objects in a collection.

Copyright: a free text field that explains the terms surrounding an object's use. You may choose to include notes on viewing restrictions, use guidelines, and rights holders. Your institution will decide what information should be included in this field; this list of requirements will be documented and explained to the catalogers.

Duplicates/Derivatives: a free text field that notes if the institution has multiple original copies of an object or if there are derivatives such as Service Copies. You may choose to include information about the location of these duplicates.

Related Material: a free text field for notes on associated objects.

Condition Note: a free text field containing information identifying chemical or physical damage/degradation that may impact playback (mold, broken cassette, hydrolysis, brittleness, shrinkage, tape damage, etc.) The catalogers may also choose to note the date of the inspection in this field.

Specific Film Fields

Reel or Disc Diameter: a drop-down field noting the size of a reel. Combined with Media Diameter, this field may help catalogers estimate Content Duration.

Media Diameter: a drop-down field noting the percentage of film filling a reel in comparison to the actual reel size. Combined with Reel Diameter, this field may help catalogers estimate Content Duration.

Base: a drop-down field noting the type of physical material from which the object is made. Examples include nitrate, acetate, and polyester.

Color: a drop-down field that indicates if the film is color, black and white, or both.

Sound: a drop-down field that indicates how the film's sound was recorded. Examples include silent, mag stripe, and variable area optical.

Print Type: a drop-down field that indicates if a film print is positive, negative, or a full coat mag.

Specific Video Fields

Cassette Size: a drop-down field for denoting if a cassette or reel that comes in two sizes (such as U-matic or 2 inch) is the large sized or the small sized variety.

Video Format Version: a drop-down field providing further information about the recording standards used on a given format. Options include Super, Type A, and Type B.

Recording Speed: a drop-down field specifying at what speed the object was recorded. Examples include SP, LP, and EP.

Recording Standard: a drop-down field that notes if a tape was created using NTSC, PAL, or SECAM recording standards.

Specific Audio Fields

Reel Diameter: a drop-down field noting the size of the audio object's reel. Combined with Media Diameter, this field may help catalogers estimate Content Duration.

Disk Diameter: a drop-down field noting the size of an audio disk's diameter. Examples of these options include 7", 10", and 12".

Media Diameter: a drop-down field noting the percentage of film filling a reel in comparison to the actual reel size. Combined with Reel Diameter, this field may help catalogers estimate Content Duration.

Base: a drop-down field noting the type of physical material from which the object is made. Examples include nitrate, acetate, and polyester.

Tape Thickness: a drop-down field that defines the thickness of the object's tape. The options range from .5 mil to 2 mil.

Sides: a drop-down field that notes if an audio object was recorded on one or both sides.

Track Type: a drop-down field that describes how many tracks are on the object. Examples include full track, 8-track, 16-track.

Noise Reduction: a drop-down field that notes any noise filtering devices used during the object's recording. Examples include Dolby A, Dolby S, and Dolby HX.

Recording Speed: a drop-down field specifying at what speed the object was recorded. Examples include SP, LP, and EP.

Viewing the Data

Every cataloger's data automatically collects in an Excel spreadsheet. The data is separated according to Media Type. The spreadsheet's tools and functions are divided between nine basic headings:

- File
 - Allows catalogers to create new spreadsheets, rename/copy current spreadsheet, view spreadsheet settings, print/email spreadsheet, export data in a variety of file formats (CSV, HTML, Excel, text, PDF, OpenOffice)
- Edit
 - Allows catalogers to cut, copy, paste, delete rows, undo/redo actions, find and replace text

- View
 - Allows catalogers to view data as a list, freeze rows/column headers so they remain visible while scrolling through data, show/hide gridlines/formulas
- Insert
 - Allows catalogers to insert new rows, columns, or new sheets, comments, functions, charts, images, and scripts
- Format
 - Allows catalogers to format text and numbers
- Tools
 - Allows catalogers to check spelling, validate data, access Google Script library, protect sheet with access controls
- Form
 - Allows catalogers to edit/fill out forms, view summary of data, email form
- Help
 - Allows catalogers to look up questions in Google Forums, view Function List, Keyboard Shortcuts

Sorting and Formulas

It is possible to sort the data in either ascending or descending order. For example, if you wanted to organize all your media by title, click on Column D (the “Title” column) to highlight it. Next, click “Data” and choose how you want to sort. (You can sort the column from Z-A or A-Z.

There are various formula functions that can quickly solve simple equations. For example, if you want to find the average media duration of the tapes in your collection, click on a blank cell at the bottom of the column. Click on the summation symbol (Σ) and then click “Average.” Next, click within the first cell you want to include in the average and, while holding down the mouse button, drag the cursor to include the full range of cells you want to include. When all the cells you want to average are highlighted, let go of the mouse button and press “Enter.” Excel will perform the calculation and present your average media duration in that cell. Similar calculations can be performed to calculate column totals.

Searching

To find specific text within the spreadsheet, click on “Edit”, then “Find and Replace”.

For more complex searching capabilities, a complete list of spreadsheet formulas and functions can be found here: <https://support.google.com/docs/bin/static.py?hl=en&topic=25273&page=table.cs>

Reporting

The spreadsheet is also configured with several additional tabs that generate reports.

Estimated File Size Calculator: This pivot table compares format counts to media duration counts. For example, this table allows users to see how many VHS tapes with a media duration of 60 minutes are in the collection. Columns at the end of the table calculate the estimated file size of preservation masters, access masters, and access copies for these assets. The last row of each column calculates the total amount of space required for each digital version.

Format: This spreadsheet uses a set of predetermined codes to identify and count the relative frequencies of each format type in the collection.

Reel Size: This spreadsheet counts the relative frequency of each reel size in the collection. These counts can help estimate content duration and file size.

Base: This spreadsheet counts the relative frequency of each base material in the collection. These counts can help prioritize certain at-risk items over other less endangered assets.

Content Duration: This spreadsheet assigns each item's content duration into a group and then calculates the frequencies of these groups in the collection.

Creation Date: This spreadsheet counts the number of items created in a given year.

Manifest: This spreadsheet provides a shipping manifest that your institution may choose to use if, for example, the items are being shipped to a vendor for digitization. This provides an easy way for your institution to keep track of the location of each asset as they are being packed.

Google Forms also creates graphs and tables based on the data collected in the Excel spreadsheet. To view this basic reporting feature, click "Forms," then click "Show summary of responses." A new window will open illustrating a summary of each field. For example, the Video Form tallies the different lengths of media duration, creates a table of the raw count and percentages, and displays this information in a bar graph.

A NOTE ON REPORTING

Due to the nature of how Google Docs captures data from forms, there are certain formulas used in reporting that are not automatically generated. In the last three columns in the response spreadsheets are three yellow colored columns containing formulas. In order to update the associated reports you must copy the formulas down into cells as you continue entering past the initial 100. The grey cells in the Manifest report must also have their formulas copied down into new cells as added. The web-based application slated for 2014 will not require this manual intervention, but it is necessary for the time being. Please contact Joshua Ranger with questions or help requests.

Exporting the Data

Although the data collects in an Excel spreadsheet, it does not need to stay there. If you choose, you can export the data to FileMaker Pro or to another database. (A copy of the AVCC FileMaker configuration is available in the Toolkit.) To export the data to File Maker, follow these steps:

1. Once the data is collected in the Excel spreadsheet, User clicks File>Download As. User may choose to download the file as an Excel spreadsheet, CSV file, or Open Office file. User specifies to save the file in the same directory as the rest of the AVCC documentation
2. User opens FileMaker Pro, opens database into which the data will be imported
3. User clicks File>Import Records>File>locates the file of interest>Open. Make sure the name of the target is Current Table ("AVCC")
4. User checks "Don't import first record (contains field names)"
5. Under "Arrange by" drop-down menu, choose "matching names"
6. Click "Import"

AVCC was developed by [AudioVisual Preservation Solutions](#) with support from The Metropolitan New York Library Council ([METRO](#)) [Keeping Collections](#) project. Keeping Collections was launched to ensure the sustainability and accessibility of New York State's archival collections as part of the New York State Archives [Documentary Heritage Program](#). [Keeping Collections](#) provides a variety of free and affordable services to any not-for-profit organization in the metropolitan New York area that collects, maintains, and provides access to archival materials.

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