



GUIDELINES FOR LISTING RECORDS PRIOR TO DEPOSIT AT GLAMORGAN ARCHIVES

DOCUMENT HANDLING – GENERAL PRINCIPLES

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GUIDELINES FOR LISTING RECORDS PRIOR TO DEPOSIT AT GLAMORGAN ARCHIVES

These guidelines are intended for those who have received training from Glamorgan Archives staff. Please contact us for more information: glamro@cardiff.gov.uk.

There are two templates that can be completed for each collection to be deposited at Glamorgan Archives. The first is a template in which you should list the individual items. The second is a template in which information about the whole collection can be entered. This reflects the archival approach to describe collections at multiple levels, working from the general to the specific.

[Listing Template – instructions.](#)

Complete the listing template using a new row in the table for each identifiable unit.

List the items in the order in which they are received or have been previously stored. Do not try to sort them into what appears to be a logical order or into categories. There may be a reason for the apparent disorder or it may tell us something about the history of the records.

If papers are already organised in a file keep the file as one unit, describing it as a whole without disrupting the order of the papers. It may be helpful to provide a summary of the contents of the file.

Descriptions should aim to be impartial, accurate and precise, consistent, clear and concise. Use agreed terminology and avoid using abbreviations.

<u>Identifier</u>	<p>Use this field to identify each unit of description in the order in which they appear/are received.</p> <p>EXAMPLES:</p> <ul style="list-style-type: none"> • Box 1/folder 1 • Envelope 3 • Blue folder (only use this if there is only one blue folder!)
<u>Title</u>	<p>This should be the primary description of the unit being described. It should reflect the item's function, activity, subject, location, or theme.</p>



	<p>EXAMPLES:</p> <ul style="list-style-type: none"> • World War I postcards • Aerial photographs of the Cardiff area • Education Committee Minutes • Press cutting book <p>Aim to keep the title as concise as possible. Further details can be added to the Description field.</p>
<u>Description</u>	<p>There will often be extra descriptive information that can be entered into this field to add to the information in the title field. E.g. details of those who appear in a photograph; details of the information contained in a register; subjects discussed in a letter etc.</p> <p>This field can be left blank if there is no extra descriptive information to be added to what is contained in the <i>Title</i> field.</p>
<u>Date</u>	<p>Identify and record the date(s) of creation of the material in the unit of description. This includes the dates of copies, editions, or versions of, attachments to, or originals of items. Record as a single date or a range of dates as appropriate in the formats illustrated below.</p> <p>EXAMPLES:</p> <ul style="list-style-type: none"> • d mmm yyyy, e.g. <ul style="list-style-type: none"> ○ 28 Jun 1884 ○ 7 Dec 1974 • centuries should be written fully, e.g. <ul style="list-style-type: none"> ○ 19th century (not C19th etc.) • YYYY-YYYY, e.g. <ul style="list-style-type: none"> ○ 1971-1974 (not 1971-74) • No space between hyphens and numbers, e.g. <ul style="list-style-type: none"> ○ 28-29 Jul 1884 (not 28 - 29 Jul 1884) ○ 1974-1979 (not 1974 – 1979) • Suggested dates in square brackets, e.g. <ul style="list-style-type: none"> ○ [18th century] ○ [1750s] ○ [1870]-1895 ○ [c1870] <p>Do not list individual dates, but rather express them as a range. If you wish to list multiple dates this information will need to</p>



	<p>be added to the <i>Description</i> field instead because CALM cannot sort multiple dates into order.</p> <p>Never use nd in the date field – always use square brackets and suggest a date (any level of approximation is better than no information at all).</p> <p><i>See appendix 1 for a full breakdown of acceptable date formats.</i></p>
<u>Extent</u>	<p>Record the number of physical units of the unit of description, and the unit of measurement (e.g. box, file, volume, paper, etc). Separate multiple terms with a comma.</p> <p>EXAMPLES: 1 box 10 boxes, 2 volumes 4 files, 3 volumes 41 volumes, 3 rolls, 13 microfilms, 1 folder of photographs</p> <p>When cataloguing digital material use this to record the number and type of files.</p> <p>EXAMPLES: 12 PDFs 10 .doc files 2 spreadsheets 1 audio file</p> <p><i>See appendix 2 for a list of acceptable terms to be used in the extent field, with definitions</i></p>

Collection Information Instructions.

Complete this template for the whole collection. Some of the information may come from looking at the records. Other information will come from the individual or organisation who has been looking after the records. Some information may not be available but it is useful to complete as much as possible.

It may be useful to carry out some research for the administrative/biographical history section. If you use other sources, please quote them.



APPENDIX 1 - Acceptable date formats

The table below has been modified from the list of acceptable date formats given in the CALM manual. These are all options that comply with our house style and will be read correctly by CALM to allow for accurate sorting into date order.

Format	Example
century	1900s
century century	1800s-1900s
decade	1910s
decade decade	1910s-1920s
month month year	Jan-May 1999
month year	Apr 1456
month year month year	Jan 1256-Feb 2002
month year number month year	Jan 1689-23 Dec 2001
number month number month year	12 Dec-16 Dec 1435
number month year	15 Jul 1678
number month year month year	14 Sep 1357-Jan 1367
number month year number month year	23 Apr 1278-28 Feb 1456
number month year year	23 Jan 1300-1301
number number month year	23-27 Jan 1987
ordinal century	early 12th century
ordinal century ordinal century	12th century-mid 20th century
ordinal ordinal century	12th-16th century
year	1456
year ordinal century	1256-15th century
ordinal century year	16th century-1704
year year	1789-1867
season year	Spring 1918
season year season year	Spring 1918-Summer 1920
law term year	Easter 1916
law term year law term year	Hilary 1966-Trinity 1974



APPENDIX 2 - Acceptable terms for 'extent'

Booklet

A small volume, typically less than 20 pages, often with soft covers.

Bundle

Term can be used for large, loose collections of papers, which are not typical of a *file*. Ideally, the bundle should be described as '142 papers, 16 envelopes, 3 photographs', etc., but we often do not have the time to supply these details unless we are listing individual items. If individual items are counted it may be useful to describe as e.g., '1 bundle of 142 papers'.

Card

Confine use of the term to thick, dense paper on which photographs, maps and prints may be mounted ('1 photograph on card') and greetings cards, invitation cards, etc. *Postcards* could be defined separately (see below).

File

A collection of papers and related items such as photographs and plans which are attached physically together by clips/staples/stitching. They are typically held in soft covers and their unity is often shown by their chronological/alphabetical sequence. The term could also apply to papers, etc. formerly held in sequence in envelopes, folders or spring binders. Very small gatherings of papers (less than 10?) might be better described as '9 papers' or '6 papers' etc.

Paper conveyances (except *Parchment*), abstracts of title, etc. also fall into this category since they are often stitched together.

Folder

Avoid use of this term since it is properly a container. Extent is essentially a matter of make-up and the contents of folders are better described as bundle, photograph, file or xx papers, etc. Therefore, only use this term if the folder is being retained as an archive in its own right.

Envelope

As with *Folder*, usually just a container so avoid using, but envelopes sometimes do literally bear scribbles on the back of them (such as sketch plans, agenda, etc.) which may be of historical value at item level.

Maps and plans

The distinction between 'map' and 'plan' is not critical and popular definition is hazy.

Map

The term covers county, national and international maps but not most 'estate maps' and 'tithing maps' which are strictly *plans*. Maps may be defined as two-dimensional representations of the landscape with significant exaggeration of particular features of the



landscape to make them legible, e.g., railways, roads, major buildings, etc. and frequently use colour and hachuring.

Plan

The OS defines a *plan* as one sufficiently accurate to depict small individual features such as buildings, canals and rivers without notable distortion of size. These include the 1:2500 and larger scales. Nearly all estate plans, all architects' plans, and most sale particular plans fall into this category.

*We could apply the arbitrary distinction:

Plan: scales 1:10,560, 1:10,000; 1:2,500, and smaller, i.e., 6-inch scale, 25-inch scale, etc.

Map: any scale above 1:10,560, i.e., 3-inch, 2½ inch, 1 inch (1:63,360), etc.

Pamphlet, manuscript, poster and leaflet

Avoid these terms in 'extent' because everyone has a different definition but it would be legitimate to use them in the 'title' and 'description'. These should be covered by other terms such as '1 paper' and '1 volume'.

Paper

A single sheet of paper. An item such as a letter consisting of only a few sheets of paper could be described as '3 papers, 1 envelope'.

Parchment

Strictly speaking, this is not a description of extent but material. It is, however, in common use and is a useful 'umbrella term' for conveyances, settlements, recoveries, fines and leases. We need not count the number of individual membranes since these are generally stitched together to form a single item but could make exceptions for particularly large items, eg '1 parchment of 12 membranes', if that helps the searcher.

Photograph

This should include both original photographic prints and copies taken from them. If it is a copy this should be explained in the *Title* or *Description* fields.

Plan

See *Maps and plans*

Postcard

Postcards are easily identifiable - typically published items, often in standard sizes, and bear illustrations/photographs. Photographs are sometimes marked on the back as 'post card' since they were printed for circulation among friends and family but they were not published and sold like postcards.

Roll

Use a more specific description if it helps a searcher to understand associated problems connected with their use or copying since a 'roll' might be a map, plan, pedigree, manorial



accounts, honorary address, playbill or poster. A long, rolled photograph, for example, might be better described as '1 rolled photograph' rather than '1 roll' or '1 photograph'. The same might apply to plans: '1 rolled plan' particularly if the item is especially large ('1 large roll'). Manorial accounts might be '1 parchment roll' or '1 paper roll'.

Volume

A collection of individual pages/folios stitched, stapled or pasted inside covers. The covers can be hard or soft. A volume can be described as 'large', 'medium' or 'small' if this helps the searcher or archivist with regard to production and copying but there are no guidelines on measurement or weight.



APPENDIX 4 - Collection Information Template.

Background information about the collection:

<p>Who created the records?</p> <p><i>This may be an individual or a business/organisation/department e.g. the author of a diary or photographer of a photograph but the organisation generating accounts or minutes.</i></p>
<p>How/why were the records created or collected together?</p> <p><i>If known this information can help us to understand the records better.</i></p>
<p>Who has been responsible for the records in the past?</p> <p><i>Provide information on changes of ownership and custody of the records that is significant for the collection's authenticity, integrity and interpretation.</i></p>
<p>Where have the records been stored until now?</p>
<p>How or why did the records come into the care of the depositor/donor?</p>
<p>Administrative or biographical information about the person/people/organisation that created or collected together the records:</p> <p><i>This helps to set the records in context. Only include information that is relevant to the records. Do not focus on aspects of the organisation or individual that are not represented in the records being deposited.</i></p> <p><i>Ideally a good biographical history should include full name and former names, date and place of birth, names of children, education, career and achievements, and important relationships with individuals or organisations.</i></p> <p><i>A good administrative history will include date of foundation of the organisation and date when it ceased to function (where relevant), how the organisation was formed, responsibilities and functions of the organisation and any significant changes to these,</i></p>



predecessor and successor bodies, any relationships with higher authorities, the administrative structure of the body and any changes of name of the organisation.

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General information about the records:

Summary description of collection:

Give a brief summary of the scope (such as time periods and geography) and content (such as documentary forms, subject matter, administrative processes)

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Total extent of collection:

Follow the listing template guidance for the extent field here but it is also useful to indicate the size of the box(es) etc.

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Covering dates of collection:

Follow the listing template guidance for the date field, giving one range for the whole collection.

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Do any of the records contain personal or sensitive information that may need to be restricted? Or are there any other reason for restricting access to the collection?

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Any known details of copyright holders:

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DOCUMENT HANDLING – GENERAL PRINCIPLES

All archival material should be handled carefully to preserve the documents for future generations. These general principles should be used to help to protect items as much as possible.

- Please handle the documents as little as possible and always with great care.
- When working with documents do not use pens, biro or eraser. Only use a soft leaded pencil (such as 2B) if possible.
- Do not eat or drink near the items. As well as the possibility of causing accidental damage, food and drink can also attract pests which damage records.
- Wash your hands before handling documents and avoid using any hand cream before handling items. Oil and perspiration are acidic and can stain paper. Photographic material is particularly sensitive so Nitrile or Vinyl gloves should be worn to handle photographic material that is not already in a protective sleeve.
- Handle photographic materials as little as possible, and only hold by the edges, margins or non-image areas. Do not put fingers onto the image area, and put into sleeves as soon as possible.
- Do not lick your fingers before turning the pages of a volume as this can cause damage to the document and some paper may contain chemicals which can be harmful to you.
- Avoid leaning on documents. Try to use weights around the edge of a document (avoiding the printed area) to hold it down.
- Use reading aids to support documents where possible, such as using a book cushion or cradle for volumes.
- Avoid pulling at the head or tail of the spine of a volume when removing from a shelf, pull instead from the centre.
- Do not bend volumes back or lay them face downwards; this will damage the spine.
- Do not force a binding open if the pages do not want to separate. Consult a Conservator.



- If you need to mark a page in a volume, try to use acid-free paper as a bookmark.
- Documents should not be left hanging off the edge of a table.
- Documents that are folded should not be refolded against the original fold. If any corners are folded down, do not fold them back as this may cause the material to break. Where possible, leave the document in the state that you found it.

If you are unsure about how to handle a document, please contact Glamorgan Archives for advice.

If you would like further assistance or supplies to help you with any handling of documents, please contact Glamorgan Archives who are happy to help or supply preservation materials on a cost recovery basis.

Glamorgan Archives
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