General Archival Checklist

*NOTE: Many of these suggestions should have the caveat: "if/when possible."

Before You Leave

Source Related:
- Make as comprehensive a list as possible of published and digitized primary sources related to your topic (AND while researching, go back and check Google Books. Stuff is being added all the time. Don't waste time on things you can get at home).
    - Some other online collections of digitized material to check:
        - Internet Archive
        - Europeana
        - Hathi Trust
        - DPLA
- If you only need to look at 1-2 things, contact the staff to see if you can do research remotely. You might be able to save a trip. Also, inquire about proxy researchers if you can't make the trip - most archives have a list of contacts that you can hire to do research on your behalf.
- Comb the secondary sources that are most closely related to your research topic to identify "must-see" collections.
- Once you identify your archives, start generating lists of the collections you want to see, and if the finding aids are good, the particular boxes and folders. Excel is good for this.
- As you make this list, begin prioritizing the collections (taking into account, among other things, what has been published/digitized).
- Make contact with the archivists via email or phone in order to find out if the archives will be open when you want to come, if any collections will be closed at

the time, and ideally if they have suggestions of any resources you might find valuable. The more of a rapport you can build, the better.
- Read **everything** (policies, procedures, collecting areas, contact info, etc.) on the institution's website before you go.
- Check if the collections you want are on-site. Collections are often stored offsite and may take several days to arrive, so you'll want to request things early.
- Talk to anyone around the department who has visited your archives, in case they have any helpful tips to pass on. If no one else has been there before, send around a query on an appropriate H-Net subject list. Seek out other online forums where scholars discuss your area, such as Facebook groups.
- Be sure you know about and obtain any credentials or qualifications that you may need for entry into archives. This might include background checks or pre-approval. Contact archivists early to figure out what needs to be done before you arrive.
- Ask your advisor to write a generic letter on your behalf (some have called it a "letter of introduction") on OSU letterhead that explains your project, what materials you need, etc. This is much more common outside of the U.S.
- Know how to get to the archive and how long it takes. Sometimes it isn't as easy as you think, and it's best to plan your route before you go.
- If possible, and if relevant to your research, try to research the history of the archive itself that you're going to. What is there, why, and how it came to be there can be as much a part of the story of the documents, and can often provide important context to the documents. You can also ask the archivists when you arrive if you're interested in the archive's history.
- If you are so inclined, let your fellow students know which archive you will be visiting. Occasionally, someone might need a key document photographed, and they will owe you big in the future!
- Additionally, consider contacting academics in your field at the institution you're visiting. They may have insight into the collections there, and may be able to direct you in your research while you're visiting.

Equipment/Organizational:
- If you use a digital camera in the archives, buy EXTRA memory cards.
- Figure out in advance how you are going to organize your pictures (iPhoto, generic Microsoft folders, Full version of Adobe Acrobat, etc.) and label folders and individual files.
- Some helpful tools:
    - o [Tropy] is free open-source software that allows you to organize and describe photographs of research material.

- o JotNot Pro and Tinyscanner are smartphone apps that allow you to make PDF files with your phone's camera, instead of photo files which may take up more space.
- Decide on a note taking system that allows you to clearly distinguish between quotes, paraphrasing, and your own thoughts on the documents - make a style guide of sorts to remind yourself which is which. Be as consistent as possible.
  - o Tools like OneNote and Evernote have tagging functionalities and structure that may be helpful when taking notes on your computer, instead of using a plain Word document.
- Make sure your notes include all identifying elements of documents (e.g. call numbers, box numbers, folio numbers, etc.) as well as a general description of the document.
- Decide on a method of backing up your photos and notes (external hard drive or cloud service like Google Drive, dropbox, Carbonite, Amazon cloud drive, Apple time capsule, etc.).
- Look up the archive's policies online for photocopying and photography. Fill out the forms in advance if you're so inclined.
- Bring pencils. Most special collections rooms don't allow pens.
- You may consider investing in a laptop lock. If you want to get up and go to the bathroom and you don't want to have to pack up your computer and everything, you can feel more secure leaving it in your place.
- Inquire with the institution about travel grants or residence options that they may have on site for visiting researchers.

At The Archive
- Ideally you have built some email relationship with a staff member, so it's best to let them know when you are coming.

Don't forget to bring:
- Coins for lockers and sometimes for copy machines
- Pencils and loose paper if you're into handwriting notes
- Laptop
- Camera (turn the flash off!)
- Chargers/extra batteries for both
- Magnifying glass (most reading rooms have one, but it may be in use)
- Thumb drive/external hard drive and extra camera memory cards
- Granola bar or some sort of high calorie, high energy snack
- Bottle of water to keep in your locker

- Sweater even in the summer (some of these places are climate controlled and can be pretty cool).
- Advil/Tylenol or whatever you like (the older the documents/handwriting the more this applies, same with if you're doing a lot of stuff with microfilm). Antihistamine if you have bad allergies, documents are dusty.
- Pocket package of tissues.
- If you're allergic to book mold, purchase face masks ahead of time that are fine enough to block mold spores (which are smaller than dust particles).
- Purel and moisturizing lotion for after handling moldy old documents. Also, bandaids for those nasty paper cuts.
- Bring cash for copy fees, entrance fees, camera fees, parking fees, etc., small bills if possible in case they won't make change
- Small notepad to take down reminders, write call numbers, use as scrap paper etc.
- Book snake or other implement to help hold pages (sometimes archives provide these; sometimes they do not)

While There
- Be nice to the staff at the front ☺
- Especially at smaller archives, make sure that the archivist(s) know what you're working on, and occasionally ask them if you have missed anything. They know their archive much better than you ever will.
- Be nice to the other researchers, you might not know if you're sitting next to the Joe/Jane Bigwig in your field or a future bigwig with whom you could develop a working relationship.
- Talk to the other researchers when the opportunity arises.
- Get there when the place opens. Often paging happens at set intervals, so if you get there at the wrong time you might have to wait 30 minutes to get anything.
- Some archives let you register as a researcher and order materials online ahead of time; this will cut down on the time you wait for books to be paged.
- Better yet, get there early, chat up the other folks (probably researchers) swilling coffee on the sidewalk outside.
- Ask about dictionaries, other sources you may need - they may have them for you to borrow. They may not let you bring other books into the reading room.
- Stick to your note taking system.
- If you take pictures/make copies, be careful to keep note of what's in each picture so you can cite it later. One recommendation is to write the call number on a piece of paper and take a picture of it first; then take pictures of the

document. That way, when you go back through you can see via the thumbnails exactly which document is which and starting when.
- If you're having difficulty reading handwriting, try drawing what you see on scrap paper. Sometimes the feel of writing will make you aware of what your eyes couldn't see. Sometimes, holding the page up to a light or tipping it at different angles can help you see faint pen strokes. If you're lucky enough to have a digital copy of the document, try playing with the contrast.
- If possible, keep any boxes on hold that you're reviewing or have yet to review - don't say that you're finished with them until you're done with the research trip. Some archives send boxes offsite to be reshelved and they may be difficult to get back quickly.

End of the Day
- Look over your work when you get home.
- Organize your photos and copies (perhaps creating pdfs the evening after you take photos. You still have some memory of the documents and can identify any miscataloging or problem. Days or weeks later you might not have such a good idea of what these documents were).
- Use this time to pursue any new leads your days work brought about. Search online catalogs at night, if they don't have one, make a list of what you want to look for in the card catalog the next day.
- Write a little even if it isn't formal. Write a paragraph or a page about the documents that you saw and their possible usefulness.
- Make note of interesting stuff that was far afield from your project. You may come back to these things in future projects.
- Get a good night of sleep. It's impossible to stay awake, alert, and productive in a dusty, dark archive if you haven't slept well the night before.
- On days that the archive is closed, get out and explore! You'll go crazy if all you do is work.

After the Archive
- Send a thank you email or card to the staff, or some gesture of the sort. You might also consider purchasing a particularly helpful archivist a gift.
- When you publish your work or finish your dissertation, don't forget to acknowledge the archives and the staff (you'll also have to ask for permission for publications).
- Some archives, especially if you receive a grant from them, ask for copies of subsequent publications and dissertations. Keep some sort of record for this type of thing.

- Make a list of things that you missed. You want to know exactly where to pick up when you return.
- BACKUP! BACKUP! BACKUP!