



### Surveying Checklist

Be sure to do all of the following before you finalize a survey record in the database.  
(Some of these activities can or should take place away from the materials.)

*Verify the basic collection information already in the record.*

Christine will pay particular attention to the title and main entry prior to surveying, so these will require less attention at the time of surveying, but the other fields may require substantial clarification. Verify and revise as needed the information in the following fields:

- Main entry
- Collection title
- Dates (first, last and bulk) – as you’re surveying note the earliest thing you come across and the latest thing, as well as the overall time period from which the bulk of the material dates.
- Extent – add additional information or clarify the information in the record as needed.
- Language – when a new record is created, the default primary language is set to English. Be sure to change this if the collection materials are primarily in a language other than English. Add a secondary language if there is a notable grouping of materials in more than one language.

*Fill out the fields in the Survey tab*

- Ratings
- Provide a general note that explains the rationale for the ratings clearly and in full sentences. If you take notes at the time of surveying and polish the text later, be sure to remove the raw notes.
- Note any unusual or particularly troubling conservation issues and check off any of the three Special Conservation Issues that apply.
- Fill out the survey housekeeping data (date, time, surveyed by) completely.
- Indicate whether any special review is required by selecting “Yes” in the appropriate review fields and writing an explanation of what, in particular, needs review in the Notes To/From Surveyors field.

*Verify the information in the Access tab*

- Christine will check off the access tools that she found, but if there are additional tools, add or note them as needed.
- If there are related collections, add information on the main entry, title, and repository.

*Add information to the Special Formats tab*

- Check off any of the special formats that are present, even if there is only a small amount.
- If you check the “Other” box, provide an explanation in the popup dialogue box.
- Provide notes for any formats that require additional explanation.

### *Create or update abstract*

- At a minimum, the abstract should include a brief biographical/historical note and a brief scope and content note. It should be written in sentence and paragraph form. Keep in mind that many of the entries pre-loaded into the abstract field will not meet these criteria and will need to be revised. (For efficiency's sake, you will often want to work on the abstract away from the materials.)
- If you take notes for the abstract at the time of surveying and go back to polish it later, be sure to remove the raw notes.
- You only need to indicate that you revised an abstract if the repository started out with a polished abstract and you made major revisions.

### *Add subjects*

- This should be done away from the materials in order to make the most efficient use of time, but you may want to put notes in the database about possible headings. If you do make notes, be sure to remove them later.

### *GIS tab*

- We are still waiting to receive more guidance on the scope of the GIS component of the project and what will go into each of these fields. If you notice that a collection is focused on a particular geographic location that is more specific than what will be captured in the geographic headings (for example, the address of a family estate or a Philadelphia shop), note this information in the Location Description field. You can indicate multiple locations.

### *Local fields tab*

- You will generally not need to revise anything in these fields. If you've discovered changes or deviations from what is there already, check with Christine or the site staff before changing any information in the local fields.