Key

workflow stage
document

Quick workflow summary
- What material do we want to collect?
- Add potential donors to spreadsheet
- Give information to donor
- signing deed of gift / record oral history
- conservation condition report
- accessioning
- creating the finding aid
- internal sensitivity check / send for review to donor
- finalising deed of gift
- conservation assessment / digitising / revising finding aid

- takedown and alterations
- adding to old collections

List of documents
- Overarching Workflow
- Accession policy
- Donor Spreadsheet
- query email text
- donor information sheet
- slideshow for meetings
- public broacher
- oral history workflow
- recording and copyright agreement
- deed of gift
- accession record
- sensitivity check
- finding aid
  - finding map
  - description summary
  - container list
- conservation report
- spec doc about digitising
- digital maintenance and management
- takedown workflow
- takedown request form
- takedown report template

Workflow
An overview of the whole process

Scouting and Acquisition

Donor spreadsheet
Wish list of potential donors including which are priorities. Also includes information on how acquisitions are progressing, for example whether deeds of gift have been signed.

What material do we want to collect?

Accession policy
We need to think about what we are unable to take because of space restrictions, for example.

Add potential donors to spreadsheet

Give information to donor

query email text

Donor information sheet
Information on the process

slideshow for meetings

Public broacher
A general broacher on the Archives and its activities

signing deed of gift

deed of gift
This does not have to be final. The donor can make amendments. It is advised that if the donor wishes to make amendments they are kept in the loop throughout the processing.

record oral history

oral history workflow

recording and copyright agreement

Accessioning

Conservation condition report

Accession record

Accessioning

creating the finding aid

internal sensitivity check

sensitivity check

Send descriptive summary and container list to donor

finalizing deed of gift

The finding aid

Finding map

descriptive summary

container list

Digitizing

conservation assessment

conservation report

digitising

spec doc about digitising

digitising maintenance and management

revising finding aid. Time embargoes and conservation

adding to old collections

Takedown and alterations

Takedown policy and workflow

Takedown request form

Takedown report template