

Arrangement and Description

Processing a collection and getting it online involves two things:

- **Arrangement:** intellectually (and sometimes physically) putting your collection into a logical order
- **Description:** explaining what is in your collection, the history of your collection and where it came from, and why your collection matters

You will be responsible for arranging your collection, although UPLINK staff are more than willing to look at your proposed arrangement and give feedback. UPLINK can handle most of the description for you unless you choose to describe your own collection to save money. You can learn more about UPLINK service charges [here](#).

Arrangement

Arrangement Terminology and Theory Crash Course

Arrangement is putting a collection into a logical order intellectually (on paper) or physically to help a researcher quickly understand what is in the collection and how it is organized.

Arrangement Principles

There are two main arrangement principles:

- **Provenance:** the person, people, or organization who created or accumulated the records
- **Original Order:** the organizational filing structure used by the creator(s) of the records

Ideally, all records with the same provenance are grouped into one collection and kept in original order and the arrangement just describes the organizational structure that is already there.

Maintaining the original order of a collection can help researchers to understand the function of the original records and the thought process of the creator.

However, many collections have no original order, and many archives and other heritage organizations have traditionally separated records by format or topic instead of keeping the original order. In these cases, we must impose a logical arrangement on the collection.

Levels of Arrangement

Collections can be arranged at several levels:

- **Series Level:** The definition of a series (according to Lois Hamill, *Archival Arrangement and Description*, p. 23) is “a group of records based on ‘a filing system or maintained as a unit because they relate to a particular subject,’ ‘result from the same function or activity, have a particular physical form, or have some other relationship resulting from their creation, accumulation, or use.’” In other words, the goal is to break the collection into broad categories that cover everything in the collection. See the “Types of Arrangement” section on this page for more information about creating series.
 - You may also create sub-series if necessary.
- **Folder Level:** The folders within each series are given titles and listed. Keep original folder or document titles whenever possible.
- **Item Level:** The items within each folder are listed individually.

To add your collection to UPLINK, you only need to arrange your collection to the series level. However, depending on the content of your collection, the folder or item level might make more sense. If the structure of a collection is very simple, (ex: every annual report from an organization from 1900-1950) then a series-level arrangement is sufficient. Most (though certainly not all!) collections benefit from folder-level arrangement. In most (but not all!) cases, item-level arrangement is extremely time-consuming without adding much value.

Please avoid series like “miscellaneous” or “other!” It is preferable to have a few very small series rather than one series labelled “miscellaneous.”

Example of Series-Level Arrangement

George Shiras III papers:

- Series I. Manuscripts
- Series II. Publications
- Series III. Letterbook
- Series IV. Memoirs
- Series V. Correspondence

Example of Folder-Level Arrangement

George Shiras III papers

Series V. Correspondence

1. Correspondence - - Between George Shiras, 3rd and Theodore Roosevelt (1902-1918)

2. Correspondence - - Personal Correspondence (1896-1918)
3. Correspondence - - Personal Correspondence (1919-1928)
4. Correspondence - - Letters from Mrs. Edith Kermit Roosevelt (1928-1938)

Example of Item-Level Arrangement

George Shiras III papers

Series V. Correspondence

Folder 1. Correspondence - - Between George Shiras, 3rd and Theodore Roosevelt (1902-1918)

1. Letter from George Shiras to Theodore Roosevelt, March 12, 1902
2. Letter from Theodore Roosevelt to George Shiras, March 17, 1902

Note: While the series and folder titles given here are from an actual collection at the NMU Archives, the items are made up for the sake of example.

Types of Arrangement

Some common ways to create series in a collection are:

- By format/type of record
 - Ex: Correspondence, Annual Reports, Photographs, Publications, Manuscripts
 - Sample finding aid: [Barbeau and Scranton shipping records](#)
- By sub-groups within an organization
 - Ex: Records from departments, committees, etc.
 - Sample finding aid: [Soo Line Railroad collection](#)
- By topic
 - Ex: Subjects within the collection
 - Sample finding aid: [Marquette West Rotary records](#) (NOTE: This finding aid combines all three approaches to creating series.)

You might also choose to impose order within each of these groupings by arranging records:

- Chronologically
- Alphabetically
- By some other arrangement that makes sense for the collection

Intellectual versus Physical Arrangement

- **Intellectual arrangement** refers to a written organization of the collection into logical series and possibly folders and items.
- **Physical arrangement** refers to the physical order of the records in the boxes.

Records are often physically rearranged to match their intellectual arrangement, but they don't have to be. You might choose to not physically rearrange records in order to:

- Save time
- Separate formats that can damage each other or have different storage requirements.

Items that should be separated from the rest of the collection include:

- Oversized documents that cannot fit into the same box as the rest of the collection without being folded or bent
- Items with condition issues that could spread to other items such as: mold or mildew, acetate negatives with vinegar syndrome, deteriorating nitrate negatives. See the [Appraisal page](#) for more information about identifying deteriorating negatives.

If you choose not to physically rearrange the records, then you should give a clear location for which box each series (or folder or item) is in.

A Step-by-Step Guide to Arrangement for UPLINK:

1. Find any documentation your organization has about the collection such as donor or accession forms. If there aren't any such records, talk to people in your organization that might remember the state of the collection when it was donated. Look for anything that mentions the order of the collection when it first arrived at your organization.
2. Look through the entire collection without physically rearranging the order of the items. You don't need to (and shouldn't, especially if it's a large collection!) read through every document or play every AV record. Make a formal inventory and/or informal notes about the kinds of records in the collection and what they document.
3. Write a proposed arrangement for the collection using the [UPLINK Arrangement template](#). If you know that the collection is in original order, the arrangement should match the original order. If the collection is not in original order (or if the collection was donated in a completely chaotic 'order'), then create series using the guidelines in the arrangement template.
4. Check to make sure that everything in the collection fits into one of your proposed series.
5. If you would like feedback on your proposed arrangement, please contact UPLINK! UPLINK staff are happy to assist you with deciding on an arrangement for your collection.
6. If you decide to arrange the collection to the folder or item level, group all loose documents, photographs, or other items into folders and label those folders. Make a list of all of the folders or items in each series and list them on your arrangement document.

Folders/items within a series are often arranged chronologically or alphabetically.

7. If you decide to physically rearrange the collection to match the intellectual arrangement, then put all of the folders or items in order.

Description

Collection-Level Description

Archives describe collections with “finding aids” that contain information about the collection and its arrangement. Some components of finding aids are:

- Biographical/Historical note: Information about the creator(s) of a collection
- Scope and Content note: What is in the collection and items likely to be special interest
- Arrangement note: Whether the collection is in original order. If not, how it is arranged and why it is arranged that way.
- Date range of the collection
- Important subjects, people and places in the collection

As part of your annual membership dues, UPLINK can create collection-level finding aids for your organization. All you need to do is fill out a [questionnaire](#) about the collection and a basic arrangement or inventory of the collection. This is a great way to get the word out about analog collections that you can’t digitize or haven’t digitized yet! It also helps to provide context for your digitized items.

Item-Level Description

Individual digitized items need their own descriptions in order to be searchable. Common components of item-level description include:

- A 1-2 sentence scope and content note describing what the item is.
- An exact or approximate date of creation
- The name of the creator
- Subject headings, names, and places related to the item
- A link to the collection that the item came from

UPLINK staff members can write the item-level descriptions for you. However, we charge less if you write your own descriptions. Another benefit of describing your own collections is that you are more likely to be able to identify people and places in images or videos than we are.

Training

UPLINK staff can schedule a one-on-one arrangement and description training session with your organization if desired.