

Using Archives: Finding and Handling Historical Records



Course promise: practical skills to locate, evaluate, request, and use archival records responsibly.



Audience: students, academic researchers, family historians, and museum staff.



Core distinction: archives hold unique, often unpublished materials; libraries hold published, mass-produced sources.



Learning path: archival organization, search planning, finding aids, digital records, family history.



Also covered: handling originals, copyright and ethics, citations, and a reusable research workflow.



What Archives Are and How They Differ from Libraries

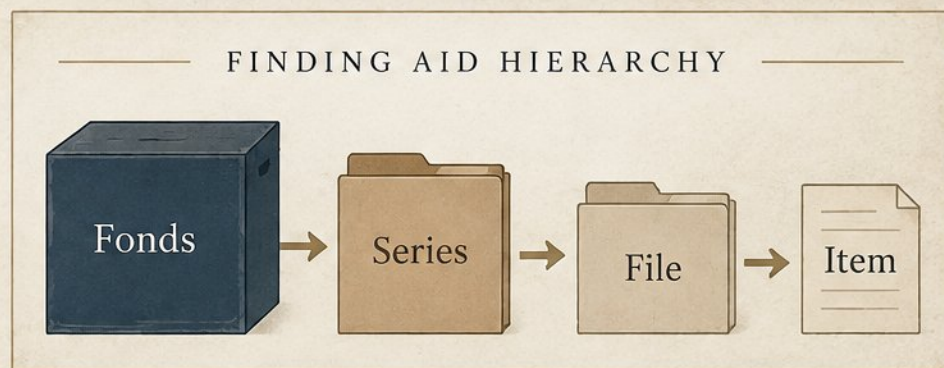
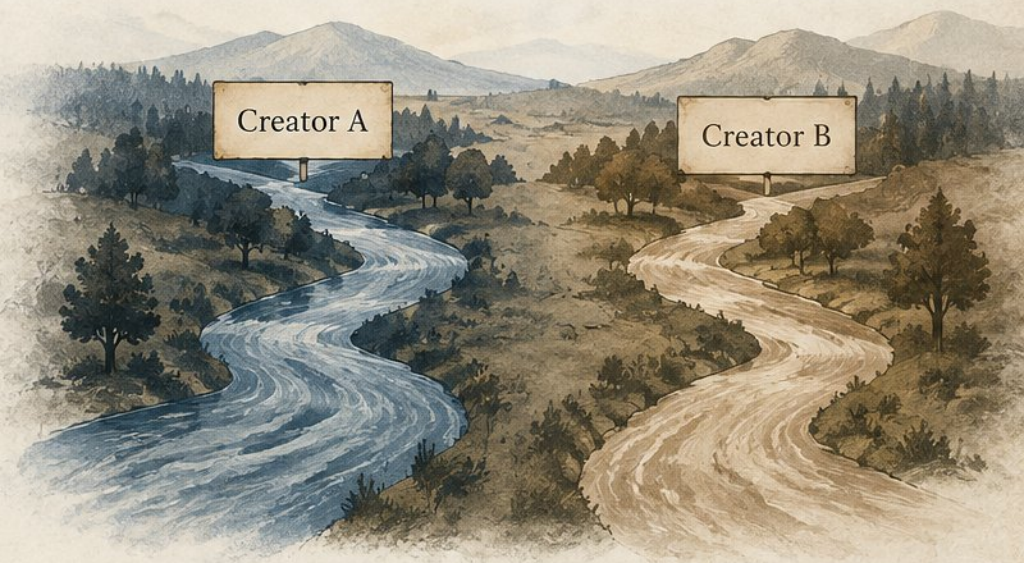


- Archives hold documentary materials kept for enduring evidential and historical value
- Library collections are published, openly shelved, and loanable
- Archival collections are unique, closed-stack, non-circulating; used in a supervised reading room
- Materials created for practical, personal, or administrative purposes — not for researchers
- Barriers: access restrictions, reading room rules, description gaps, off-site storage

How Archives Are Organized: Provenance and Original Order

RECORDS
PEOPLE
CONTEXT
ENDURING VALUE

- **Provenance (respect des fonds):** records of one creator stay grouped, distinct from others
- **Original order:** the creator's filing sequence is preserved for its evidential meaning
- **Arrangement = organizing materials;** **description =** representing them in catalogs and finding aids
- **Reorganizing by subject or format destroys context;** imposed order is documented
- **These principles apply equally to** physical and digital records



Hierarchy of Description: Fonds, Collection, Series, File, Item

- Description moves whole-to-part: collection or record group, series, subseries, file, item
- Most collections described at collection, series, and folder level; item level is rare
- Intellectual arrangement (finding aid) can differ from physical arrangement (boxes)
- Key terms: fonds, accession, collection number, box and folder, extent, linear feet
- Researchers usually search and request at collection or series level, not item



Planning a Search Before You Arrive



Start with a research question;
read secondary sources first



Map names, places, dates, and
organizations to likely record creators



Match your topic to repositories'
collecting mandates and strengths



Build a term list: variant spellings,
alt names, format words



Contact archivists early; plan for
off-site retrieval and limited hours

Reading Finding Aids and Catalog Records

CONNECTING PEOPLE
WITH THE PAST



Front matter: title, creator, dates, extent, language, abstract, repository contact



Scope and content note says what is and is not included; arrangement note explains order



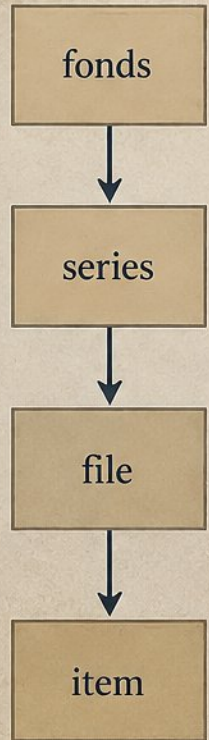
Administrative information: access conditions, use conditions, custodial history, preferred citation



Controlled access terms — names, subjects, places — unlock related collections

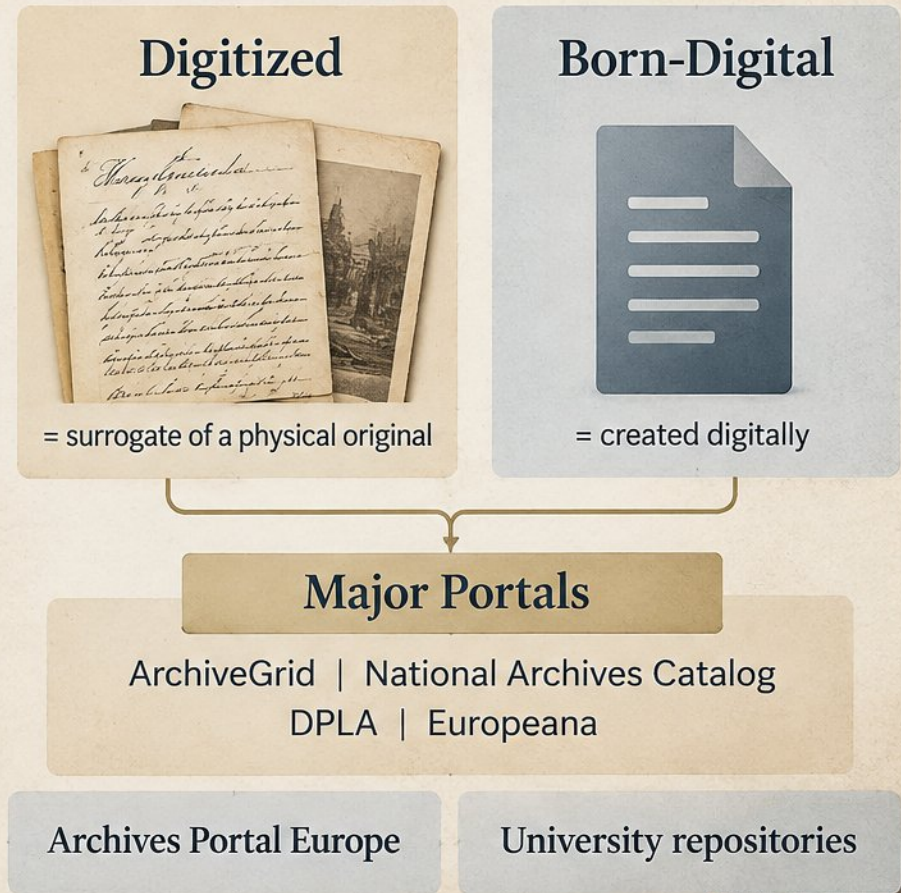


Red flags: restricted files, unprocessed collections, off-site storage, missing container lists



Finding Digitized and Born-Digital Records

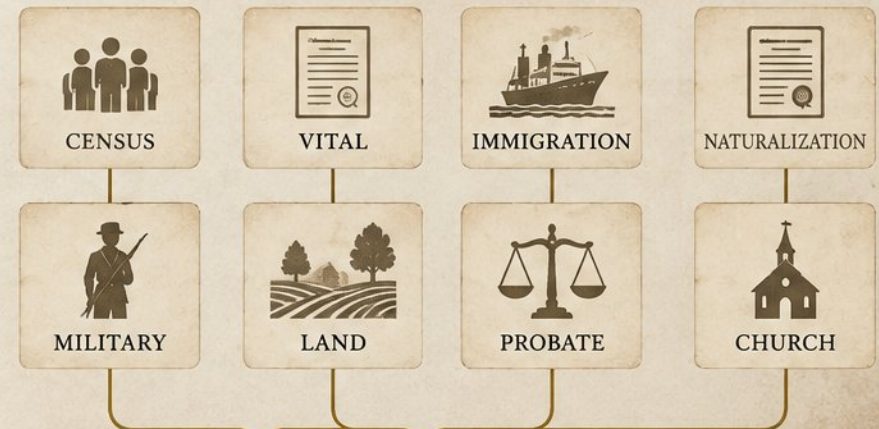
- Digitized = surrogate of a physical original; born-digital = created digitally
- Both still need archival context and full citation
- Major portals: ArchiveGrid, National Archives Catalog, DPLA, Europeana
- Also search Archives Portal Europe and university repositories
- US databases: ArchiveGrid, Archive Finder, WorldCat, SNAC — coverage differs
- Search more than one; local portals can be more current
- Use phrase searching and subject terms plus keywords
- Add format words to counter OCR errors and variant spellings
- Decide when digital access suffices and when the original matters



Family History and Genealogy in Archives

PEOPLE
RECORDS
CONNECTIONS
HISTORY

- Core records: census, vital, immigration, naturalization, military, land, probate, church
- Each record type answers a different family-history question
- Work backward from known relatives; document every link, don't skip generations
- Track name variants, spelling changes, and women's names across marriage and widowhood
- Know access rules: 72-year US census rule; USCIS file numbers; county or state vital records
- Combine archival documents with DNA and oral history carefully and ethically



Handling Physical Records and Reading Room Rules

PRESERVE
TODAY
FOR
TOMORROW



Unique, fragile, irreplaceable: careful handling preserves access for future researchers



Wash and dry hands; no food or drink; pencils only; belongings in lockers



One folder or box at a time; keep items flat and in original order



Use book cradles, foam supports, and weights; never force a tight binding



Nitrile gloves for unsleeved photographs, negatives, glass, and metal objects



Report damage, misfiled items, or conservation concerns to staff



Copyright, Permissions, and Ethical Use



- Archives may own the physical item, not the copyright



- Unpublished works: life of author plus 70 years



- Unknown author: 120 years from creation date



- Fair use and fair dealing are case-by-case; Section 107/108



- Permissions workflow: find rights holder, allow time, track steps



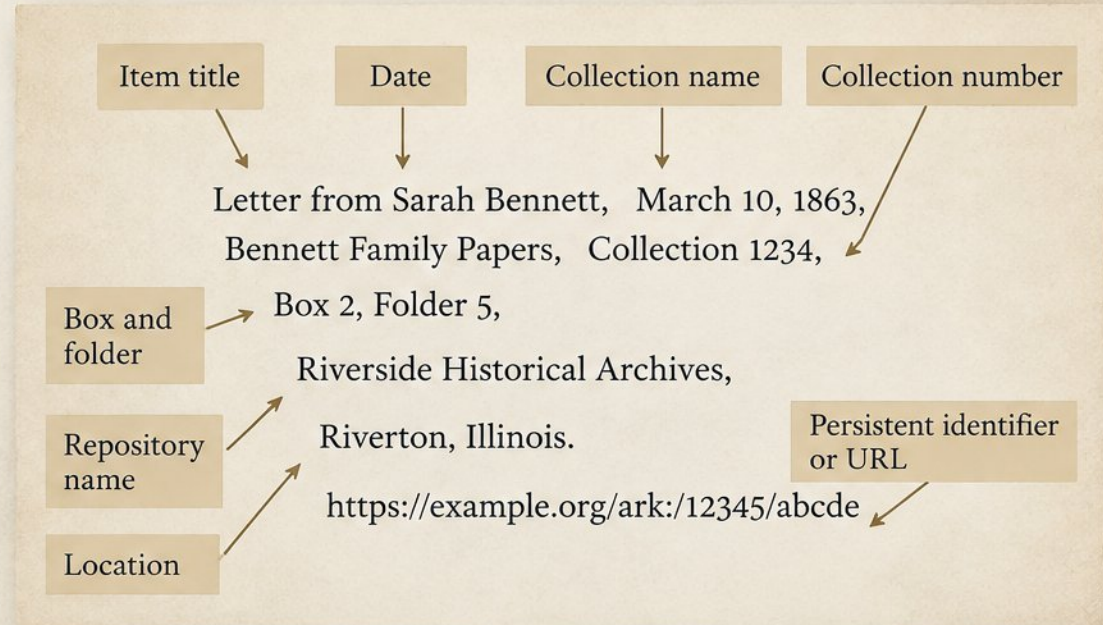
- Ethics go beyond copyright: privacy, Indigenous protocols, FPIC



Citing Archival Sources and Documenting Your Process

PRIMARY SOURCES
DEEPER UNDERSTANDING
LASTING SCHOLARSHIP

- Core elements: item title, date, collection name, collection number, box and folder
- Always add repository name and geographic location of the archive
- Archival items are unique and unpublished, so citations need more detail
- Styles differ: Chicago notes lead with the item; MLA uses collection as container; APA ends with repository
- Cite digital surrogates with persistent identifiers or URLs
- Record negative results and dead ends to keep research reproducible



Building a Reusable Research Workflow

RESEARCH
PRESERVES
PERSPECTIVE



- Nine stages: question, scan, finding aid, request, visit, capture, cite, analyze, share
- Keep a research log: repository, collection, box, folder, status, rights
- Budget extra time and cost for off-site retrieval and permissions
- Treat archivists as partners—they flag restrictions and suggest collections
- Stay current: newsletters, alerts, new accessions, digitized collections

SOURCES
INFORM
A BRIGHTER
TOMORROW





Hands-On Practice: From Research Question to Citation

PEOPLE
PLACES
RECORDS
HISTORIES



- Turn a local history question into record creators, types, and repositories



- Read a sample finding aid: scope note, restrictions, box and folder list



- Draft a folder-level citation with collection number, box, folder, repository



- Write a concise inquiry email naming collection, boxes, and visit dates



- Close with tailored next steps for students, researchers, and family historians



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PersonWise • AI digital-human course platform



Scan the code or click anywhere to watch this course live, with voice Q&A

personwise.ai/t/0c4c0b37/public