



# Oral History Processing Manual

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## Introduction

Welcome to the BHS Oral History Processing Manual!

This manual is a step-by-step guide for processing oral history collections at BHS. Processing includes five stages of work: Auditing, Cataloging, Formatting Transcripts, Editing Audio and OHMS. This manual references the following documents all located in **S:\LIBRARY & ARCHIVES\Cataloging-Description-Processing\Oral History Cataloging\Oral History Manual and Associated Documents:**

- [BHS Processing Manual 2015 revision](#)
- [OHMS Getting Started v2-1-19](#)
- [OHMS-Indexing-guide-5-15-14](#)
- [Narrator Instruction Template](#)
- [Web Release Template](#)
- [Transcript Copyright Preamble](#)
- **[OHMS-Transcript-Macro.bas](#)**
- [AT1 5 UserManual with 2 0 newfeatures](#)

## Naming Conventions

The oral history legacy assets are titled according to different file naming conventions. Going forward, please use the following conventions:

- bhs\_interviewID\_lastname-firstname\_YYYYMMDD\_version.ext
- The abbreviation indicates the stage and/ or purpose of the asset, which applies for both transcripts and audio recordings:
  - u: unedited
  - t: tracked changes
  - e: edited
  - a: access
  - o: OHMS
  - c: clip
- Example: [bhs\\_2011.019.095\\_basile ericka\\_20140604\\_u.doc](#)
- For multiple files transferred from media with multiple sides (like a series of cassettes), include a two-digit number corresponding to the side: bhs\_interviewID\_lastname - firstname\_YYYYMMDD-##\_version.ext
  - Example: [bhs\\_2011.019.095\\_basile ericka\\_20140604-03\\_u.doc](#)
- Do not create a web asset when it will be no different from an access copy.

## Before You Begin

Ideally, before you begin the auditing phase, you should have the following documents (electronically or on paper):

- Metadata Sheet
  - For legacy collections (like those in the NHPRC grant, ca. 2016) each narrator will get a "metadata sheet," which will be filled out by the processing archivist or intern. For new, incoming collections, each narrator has a metadata sheet filled out by the interviewer.
  - New metadata sheets can be created from the template found at BHS Working\LIBRARY & ARCHIVES\Cataloging-Description-Processing\Oral History Cataloging\Oral History Manual and Associated Documents\\_NHPRC\_BHS\_InterviewMetadata\_2016.docx
- Release Forms
  - 1 release form already filled out by narrator during the interview.
- Unedited Transcript or scanned transcript in pdf format with OCR applied
  - Paper transcripts were created by a transcription service
  - Transcripts have OCR applied and are saved as pdf by Project Archivist (When choosing "Recognize Text Using OCR" in Acrobat drop-down menu, edit the PDF Output Style to "Formatted Text & Graphics")
- Audio Recording
  - Recording of the interview as a single file in .mp3 format.

In addition, you should have the following software installed on your machine:

- Archivists' Toolkit
- Microsoft Word
- Audacity
- iTunes
- Adobe Acrobat (not Acrobat Reader)

You should have access to the following network drives:

- BHS Working/LIBRARY & ARCHIVES
- BHS Working/ORAL HISTORY
- BHS-ARCHIVE01/Archived Digital Assets

## Auditing with Transcript

An audit is conducted to verify the accuracy of a transcript. (If a transcript is not available, advance to the **Indexing** workflow below.) During this initial phase, archivists perform the following tasks:

- Format legacy collection transcripts or new transcripts received from the transcription service.
- Check for errors made by OCR conversion or the transcription service.
- For newly acquired collections only: Send transcripts, audio recordings and permission forms to the narrators.

### 1. Create "Unedited" Transcript

- Open transcript. This may be from a printed document converted to a pdf in Acrobat or one sent from transcription service in Word.
  - Example: [Basile\\_Ericka\\_20140604](#)
- For a pdf source: Open in Acrobat, go to "File," "Save As," "More Options" and select "Text (Accessible)"
- Save a new copy of transcript with the letter "u" (for unedited) added to the end of the file name in \\BHS-ARCHIVE01\Archived Digital Assets\Mary\1-OH Collections in the collection folder. Renaming of the folder may be necessary to comply with standard folder title [accession #\_brief collection title]
  - Example: [bhs\\_2011.019.095\\_basile-ericka\\_20140604\\_u](#)
- For the text source: Open the saved txt file with Word and save a new .doc or .docx copy of transcript with the letter "u" (for unedited) added to the end of the file name in \\BHS-ARCHIVE01\Archived Digital Assets\Mary\1-OH Collections in the collection folder.
- Close the original transcript and work only from the "unedited" version in Word.

### 2. Add Title, Header and Footer

- Select all text and change to ArcherPro Book 12-point font with 1.5 spacing.
- Add a title to the document, bold and centered, according to the following convention:

**Oral History Interview with [Narrator's Name]  
[DACS-Compliant Collection Title], [Asset ID]**

**Interview conducted by [Interviewer's Name] at the [Location] on [Month Day, Year] in [Neighborhood], New York**

- o Example:

**Oral History Interview with David Alexander  
Crossing Borders, Bridging Generations, 2011.019.011  
Interview conducted by Amna Ahmad in her home on January 13th, 2012 in  
Bay Ridge, Brooklyn.**

- Add header and footer to the document in ArcherPro Book 12-point font, centered right. In the header, type "Unedited." In the footer, enter the page number.
  - o Example header: Unedited
  - o Example footer: 58

3. Search for Brackets

- Brackets are sometimes used by the transcription company to enclose timestamps and words that are inaudible or possibly misspelled.
- Search transcript for all brackets. Ctrl+ F [
  - o Example: Her name was Victoria [Lamagne?], and she was French.
- Highlight all words in brackets so that you or the narrator can easily identify and change inaudible words.
  - o Example: Her name was Victoria [Lamagne?], and she was French.

4. Pre-format unedited transcript as Word document:

- Remove Manual Line Breaks with Replace/More>>/Special/ buttons in Word
- Use find and replace all to eliminate series of paragraph returns that can appear line-after-line in text. (There can be as many as six in a row. Begin with ^p^p^p^p^p^p and then replace with shorter strings until you've searched for two, ^p^p , in a row.)
- Determine whether names or initials of interview participants are consistent throughout. If they are not consistent, correct them. Once they are consistent, use find and replace all for a single paragraph return (^p). Do not include any text in the "Replace with" field. Then find the interviewer initials or name and colon and replace with: ^p and the proper formatting of the name, which is last name only in all-caps, colon. Repeat process for the narrator(s). (Also, find semi-colons to see if they are meant to be colons.)
- If the interviewer and narrator share the same last name, or there are narrators interviewed who share the same last name, add the first initial and a period before each last name, all-caps.
- Find for the letters "rn" as Adobe Acrobat sometimes replaces the letter "m" where it shouldn't. Find for the number "1" as it may need to be a lower-case letter "l" or upper-case letter "I".
- Find for multiple spaces in sequence. Reformatting can sometimes create 2, 3, or 4 spaces where only one is required. (NONE of our digitized transcripts require double-spacing between words.)

- Hanging Indents: For transcript readability, please select all of the interview content below the title, and move the hanging indent to .38" (.34" - .4" is in the acceptable range). You can do this by dragging the lower indentation mark along the ruler in Word, or on the "Home" controls in Word 2010: select the small arrow in the lower right corner of the "Paragraph" controls, go to "Indentation," "Special:," select "Hanging" from the drop-down menu, and in the "By:" window, enter: **.38"**
- When sending to narrator for review of newly acquired, transcribed interviews, print a copy. This doesn't apply to legacy collections like those in the NHPRC project.

## 5. Listen to interview recording with transcript when available:

### 1. Create "Tracked" Transcript

- Open the "unedited" transcript in Word and save a new copy of transcript with the letter "t" (for tracked) added to the end of the file name in \\BHS-ARCHIVE01\Archived Digital Assets\1-OH Collections in the collection folder.
  - Example: [bhs\\_2011.019.095\\_basile-ericka\\_20140604\\_t](#)
- Open the audio recording. Audacity, Quicktime and Windows Media Player all have speed adjustment tools. They augment how fast the interview plays. Use the player's time counter for relevant timecode.
- With the tracked transcript open, go to the "Review" tab of Word and select the "Track Changes" button. As you listen to the audio recording, follow along with the transcript. You should simultaneously be applying edits to the document, but also analyzing the interview content for cataloging and culling metadata content. This is indicated in the **Cataloging** section below.
- About Verbatim Transcripts: We include the natural verbal stumbles—*ums* and *ahs*, pauses, and repetitions that we all do in normal conversation—so that the written version of the interview matches as closely as possible the orality of the audio recording. These kinds of things will be edited out if the interview is quoted or excerpted.  
About Inexact Transcripts: If we are processing a previously-acquisitioned analog transcript for digital distribution/publication and that transcript omits natural verbal stumbles or superfluous words, do not attempt to match the audio recording when auditing. If the transcript has left out clauses or sentences that shape or influence the conversation or our perception of the interviewer and narrators, please include them as you're auditing.
- For privacy, we redact for specific birthdate. (This does not include birth year.) For this redaction and any other sensitive issue you encounter, find the timecode in the audio recording. Type the timecode next to the suggested edit in the transcript and highlight in yellow. This step is essential, as it will help the archivist/technician identify segments to remove while editing the audio.
- Correct highlighted words when possible. If you are unsure, leave the word highlighted for the narrator to correct. If narrator is unavailable, as they most often are with legacy collections, undo highlighted area and leave as bracketed area.
- If you have a transcript with a series of question marks in or out of brackets, i.e. [???], and you can't improve these to be the actual word or words then change the question marks to:

"[inaudible]" or "[unintelligible]"      or for Spanish [inaudible] or [inintelligible]

and remove the highlighting. Use [inaudible] for the spoken words that are way off-mic or whispers. Or use [unintelligible] for words from mumblers or super-fast talkers.

- In cases where there is an indication that the recording is paused or stopped, or there is a long pause in the interview or the interview is interrupted, but the audio is kept running, indicate that in the transcript thusly:

“[Interview interrupted.]” or for Spanish [Entrevista interrumpida]

- In cases where there is laughter in the interview and the transcription includes “[laugh]” or “[laughs]” or doesn't include a reference to it at all, indicate that in the transcript thusly:

“[laughter]” or for Spanish [risas]

- If you find that you're 4 pages into a formatted transcript, and you've been filling in so many omitted clauses and sentences that they add up to a new ½ page to a full page of formatted typing, alert the Project Archivist or a supervisor.
- Be on alert for misspelled street names, schools and other local NYC organizations. Be sure to fact-check spellings before you correct. Use the following sources as reference:
  - BHS Finding Aids: <http://brooklynhistory.org/library/wp> and <http://dlib.nyu.edu/findingaids/>
- We have a glossary of terms. Check this first for challenging words, phrases, names. Add to it when you find an answer on the web or an authority. The glossary is for editing by anyone with the link:  
[https://docs.google.com/spreadsheets/d/1rmPvVBwA5hIpL0ebg2puVUz3V6ZZ1DZ-Xd5FHmW\\_P-s/edit?usp=sharing](https://docs.google.com/spreadsheets/d/1rmPvVBwA5hIpL0ebg2puVUz3V6ZZ1DZ-Xd5FHmW_P-s/edit?usp=sharing)
- If you're working with a newly acquired transcript that has been reviewed by the narrator, incorporate all of the narrator's edits, e.g. spelling corrections, redactions, etc. into the tracked transcript.

## 2. Capitalizing race, ethnicity, social orders:

- For editing of transcripts, please be symmetrical about capitalizing cultural, religious, racial or social orders such as: Jewish, Black, Caucasian and White Americans.
- Many legacy transcripts are inconsistent about capitalizing “Black” and “White” when it refers to people and their various social arrangements (community, neighborhoods, etc.) When it is merely describing a color (skin or otherwise) make sure it is lower case.
- Use the “Match case” function in Find/Replace to seek out these lowercase & capitalized words in your open documents. Please go one-by-one to the found words and do not indiscriminately use “replace all” during this process.

## Cataloging an interview with transcription

Cataloging the collection on an item/ interview level is a time-consuming phase. Be sure to leave extra time at the end of processing for quality control and review by Project Archivist, Managing Director of L&A and Oral Historian.

### 1. Review

- Return to the "tracked" transcript for review. Take notes on:
  - Narrator's or other identified person's date of birth and corresponding timecode.
  - Possible legal issues, such as stories detailing child abuse, etc. and corresponding page numbers.
  - Brief quotes from the interview and corresponding page numbers may help you compose summaries or bios, but pull-quotes will probably not be entered into catalog records.
- Each narrator has a "metadata sheet." This could have been filled out by the interviewer or it may need to be filled out by you at this stage. The "metadata sheet" should usually be titled as follows:
  - BHS\_Accession#\_InterviewMetadata\_Lastname-Firstname\_YYYYMMDD.doc
- After listening to the interview, attempt to complete as many fields on a new metadata sheet yourself by referencing your notes, the audio and the transcript. If narrator has supplied a metadata sheet, review the narrator's sheet and add where applicable.
- See that checkboxes in the processing checklist at the end of the metadata sheet are filled in; "Y" for yes or "N" for no, whenever appropriate. Leave blank when the task only applies to the Project Archivist or you are unsure.

### 2. Write Notes

- Read pages 25-26 and Appendix C-1 on writing Biographical History and Scope and Content notes in the **BHS Processing Manual 2015 revision**. Also apply style guidelines as indicated in the BHS Editorial Style Sheet, S:\STYLE AND CONTENT GUIDES\BHS EDITORIAL STYLE SHEET.

### 3. Assign Authorities

- Read pages 31-34 on assigning access points in the **BHS Processing Manual 2015 revision**.
- Keep your total number of topical subject headings to 9 or fewer. In total there should be no fewer than 8 and no more than 15 headings per interview.

### 4. Review

- Conduct a thorough review of all notes and authorities.
- After the metadata sheet has been reviewed and corrected, a text version (.txt.) should be saved in addition to the Word document.



## Formatting Transcripts

During this phase, incorporate the narrator's revisions (if applicable) into the transcript and create access copies of the transcript for use in the Othmer Library and online.

1. Create "Edited" Transcript
  - Open the "tracked" transcript in Word, go to the "Review" tab of Word, select the button with "Accept" followed by an arrow, select "Accept all changes in document."
  - Change the header of the document from "Unedited" to "Edited" and save a new copy of with the letter "e" (for edited) added to the end of the file name in \\BHS-ARCHIVE01\Archived Digital Assets\1-OH Collections in the collection folder.
    - Example: [bhs\\_2011.019.095\\_basile-ericka\\_20140604\\_e](#)
2. Create "Access" Transcript
  - Save a new copy of the "edited" transcript with the letter "a" (for access) added to the end of the file name in \\BHS-ARCHIVE01\Archived Digital Assets\1-OH Collections in the collection folder. If there are two "edited" transcripts, combine them into one "access" version. Save as a Word 97-2003 Document (.doc) to reduce compatibility issues with Adobe Acrobat.
    - Example: [bhs\\_2011.019.095\\_basile-ericka\\_20140604\\_a.doc](#)
    - Add header and footer to the document in ArcherPro Book 12-point font, centered right. In the header, type "Access."
    - In the footer, below the page number add rights statement and a citation for the transcript in ArcherPro Book 8-point font, bold and centered left. *NOTE: THERE ARE NO BLANK LINES BETWEEN PAGE NUMBER AND RIGHTS STATEMENT. THERE ARE NO PARAGRAPH RETURNS BELOW THE END OF THE RIGHTS STATEMENT.* Format as follows:

**This transcript is hereby made available for research purposes only.**

**[Last name, First name], Oral history interview conducted by [Interviewer First name Last name], [Month day, YYYY], [Title of Oral History collection], [Asset ID]; Brooklyn Historical Society.**

- Example header:

Access

- Example footer:

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**This transcript is hereby made available for research purposes only.**

**Basile, Ericka, Oral history interview conducted by Charles Shafer, June 4, 2014; Crossing Borders, Bridging Generations Oral History Collection, 2011.019.095; Brooklyn Historical Society.**

- Open the **Transcript Copyright Preamble** and copy the graphics and text. Be sure to customize the citation section of the preamble with the accurate Collection Title and



Accession Number and the Guidelines for Use section, #3. Paste at the beginning of the "access" transcript. *YOU DO NOT NEED TO CREATE UNNECESSARY PARAGRAPH OR PAGE BREAKS WITHIN THE PREAMBLE TEXT.*

- Remove narrator's month and day of birth and replace with [date redacted for privacy].
  - KATHERINE AMBIA: And they looked in Park Slope, and in those kinds of neighborhoods, and at the time Park Slope was still too expensive for them, so they bought a house in Sunset Park. And my brother and I were born on [date redacted for privacy] 1900.
- AT THE CLOSE OF THE FINDING AID PROCESS FOR THE COLLECTION AND WITH APPROVAL FROM THE PROJECT ARCHIVIST: Save another copy of the "access" transcript as a PDF in \\BHS-ARCHIVE01\Archived Digital Assets\1-OH Collections in the collection folder.

## Indexing

- Indexing is time consuming and only recommended if transcripts are not available.
- Please see **OHMS-Indexing-guide-5-15-14** for guidance.
- REMINDER: Read the OHMS index guide at S:\LIBRARY & ARCHIVES\Cataloging-Description-Processing\Oral History Cataloging\Oral History Manual and Associated Documents
- Listen to the interview to identify the general themes of the interview and think about how to subdivide the discussion into segments. The beginnings of these segments are our index title points.
- You may find it helpful to create rough ideas of your segments with relative time-code index points at the beginning (TC-in) of the segment. Take notes! They will guide how you make final decisions about the index titles of the interview. You may also find that after hearing an entire interview, some titles can be joined together. Or a couple titles may need to be extracted from where there was only one, initially. A small theme may seem like a distraction and tangential to a larger theme of the conversation, so that small theme can be dismissed in favor of the stronger, overarching theme. (Subject headings can later be assigned to that insignificant theme, so don't forget about that theme entirely.)
- Enter your ideal index points and titles organized by a time-code and title in a working document provided by the Project Archivist. This will be a spreadsheet usually, but could be a worksheet as well.
- Your segment title should be no longer than 89 characters (or length of this sentence). For some examples of constructing titles and keeping titles concise, please see <http://cbbg.brooklynhistory.org/listen>, click on the "SEARCH SYNCHRONIZED AUDIO AND TRANSCRIPT" of some interviews and move the toggle switch on the right to "INDEX."

## Cataloging an interview with an index

Cataloging the collection on an item/ interview level is a time-consuming phase. Be sure to leave extra time at the end of processing for quality control and review by Project Archivist, Managing Director of L&A and Oral Historian.

### 1. Review

- Return to the audio for review. Take notes on:
  - Narrator's or other identified person's date of birth and corresponding time-code.
  - Possible legal issues, such as stories detailing child abuse, etc. and corresponding page numbers.
  - Brief quotes from the interview and corresponding time-codes may help you compose summaries or bios, but pull-quotes will probably not be entered into catalog records.
- Each narrator has a "metadata sheet." This could have been filled out by the interviewer or it may need to be filled out by you at this stage. The "metadata sheet" should usually be titled as follows:
  - BHS\_Accession#\_InterviewMetadata\_Lastname-Firstname\_YYYYMMDD.doc
- After listening to the interview, attempt to complete as many fields on a new metadata sheet yourself by referencing your notes, the audio and possibly the index titles. If narrator has supplied a metadata sheet, review the narrator's sheet and add where applicable.
- See that checkboxes in the processing checklist at the end of the metadata sheet are filled in; "Y" for yes or "N" for no, whenever appropriate. Leave blank when the task only applies to the Project Archivist or you are unsure.

### 2. Write Notes

- Read pages 25-26 and Appendix C-1 on writing Biographical History and Scope and Content notes in the **BHS Processing Manual 2015 revision**. Also apply style guidelines as indicated in the BHS Editorial Style Sheet, S:\STYLE AND CONTENT GUIDES\BHS EDITORIAL STYLE SHEET.

### 3. Assign Authorities

- Once your index titles are approved, go back through your notes and playback parts or the entire interview to gather subject headings authorized by the Library of Congress. These will be assigned in your metadata sheet. Keep your total number of topical subject headings to 9 or fewer. In total there should be no fewer than 8 and no more than 15 headings per interview.
- Read pages 31-34 on assigning access points in the **BHS Processing Manual 2015 revision**.
- As you are culling authority headings, don't dismiss the asides and tangents that you may have correctly dismissed during your gathering of index titles. Headings can be attached for the aside or tangent even if they seem out of place next to the rest of your more relevant headings.

#### 4. Review

- Conduct a thorough review of all notes and authorities.
- After the metadata sheet has been reviewed and corrected, a text version (.txt.) should be saved in addition to the Word document.

## Batch Conversion of WAV files to MP3

Use iTunes for batch conversion of WAV files to MP3

### 1. Open iTunes

### 2. iTunes conversion settings:

- Choose **iTunes > Preferences**
- Click **General**
- Click **Import Settings...**
- For **Import Using** select **MP3 Encoder**
- For **Setting** choose **Higher Quality (192 kbps)**
- Click **OK**

### 3. Confirm iTunes save settings [This will prevent iTunes from creating a copy of the source file, thereby conserving memory.]:

- In the **Preferences** window, click **Advanced**
- **Uncheck** the box next to **Keep iTunes Media folder organized**
- **Uncheck** the box next to **Copy files to iTunes Media folder when adding to library**
- In the field **iTunes Media folder location** click **Change**
- Choose **the desired destination drive/folder** for the MP3 files as the location
- Click **OK**

### 4. Select, drag, and drop WAV files into the iTunes library.

### 5. Right click (control + click) and select **Create MP3 Version**

## Editing Audio

An open-source program, like Audacity, is recommended for editing audio.

### Edit Access Copies

- Using the "access" transcript as your guide, replace all of the redacted segments from the mp3 audio recording with test tone. Recommended amplitude of test tone is 0.1 dB.
- Export and edit mp3 access copy. For multiple files transferred from media with multiple sides, assemble all files into one with a 2-second silent gap between the end of recorded sound in one file and the beginning of recorded sound in the file that follows. Save the access copy formatted as an mp3 (sampling rate: 44.1 kHz, bit rate: 96 kbps per channel or 192 kbps in stereo) in \\BHS-ARCHIVE01\Archived Digital Assets\1-OH Collections in the collection folder.

- [Example: bhs\\_2011.019.095\\_basile-ericka\\_20140604\\_a](#)

### **Enter Metadata**

Use iTunes to enter audio file metadata.

1. Open iTunes. If files are already in iTunes skip to Step #4.
2. Confirm iTunes save settings [This will prevent iTunes from creating a copy of the source file, thereby saving memory space.]:
  - In the **Preferences** window, click **Advanced**
  - **Uncheck** the box next to **Keep iTunes Media folder organized**
  - **Uncheck** the box next to **Copy files to iTunes Media folder when adding to library**
  - In the field **iTunes Media folder location** click **Change**
  - Choose **the destination drive/folder** for the MP3 files as the location.
  - Click **OK**
3. Select, drag, and drop WAV and MP3 files into the iTunes library.
4. Enter batch metadata:
  - Select all the files in a given collection
  - Right click (control + click) on the selection
  - Select **Get Info**
  - In the **Artist** field type “**Brooklyn Historical Society**”
  - In the **Year** field enter the year in which the interview was conducted
  - In the **Album** field type “[**Collection name, accession number**]”
  - Click **Ok**
5. Enter file-specific metadata:
  - Select all the file/versions (WAV, MP3 access) of one interview
  - In the **Song Name** field type “[**Narrator Name (First Last)**] **Oral history interview**”
  - In the **Comments** field type “**Interview conducted by [Interviewer First name Last name], [Date of interview (Month DD, YYYY)]**”
  - Click **Ok**
6. Comments metadata on PC:
  - Using a Windows PC, go to the folder in Archived Digital Assets, and right click on MP3 file.
  - Select **Properties** from menu. Select the **Details** tab. It is likely that the **Comments** you entered in iTunes do not appear in the Windows **Comments** field.
  - Copy the iTunes **Comments** and paste into Windows **Comments**.
  - Click **Apply** and **OK**

6. WAV metadata fields have not been embedded in a standard format within the file in the way that most MP3 metadata fields are embedded today. The iTunes metadata is often discarded in several other applications, including Windows file properties. Do not attempt to recreate metadata using other applications once it has been added to iTunes.
- 7.

## OHMS

Prior to working in OHMS, be sure to watch the instructional videos released by the University of Kentucky: <http://www.oralhistoryonline.org/documentation>.

Login for OHMS:

<https://ohms.uky.edu/index.php?logout=true>

UN: [unique to user]

PW: [unique to user]

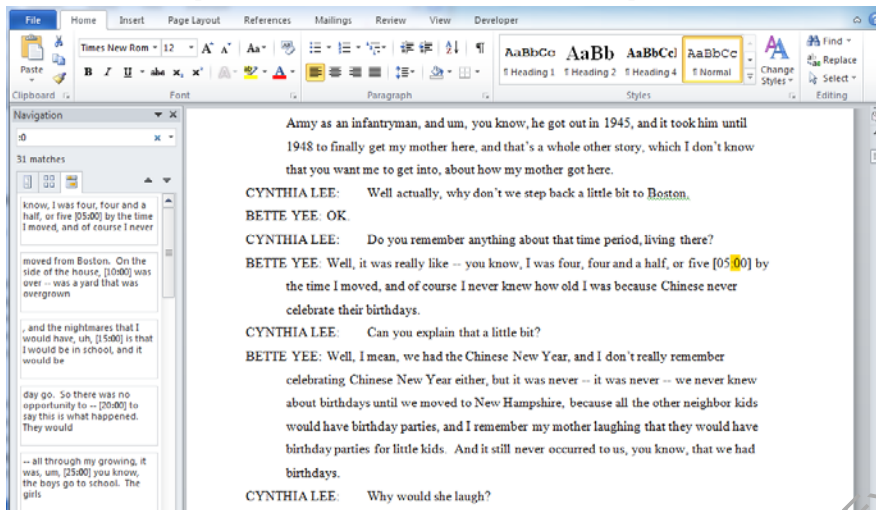
The work in OHMS is broken down into the following phases:

1. Preparing Transcripts for OHMS
2. Creating Records
3. Syncing
4. Indexing

### Preparing Transcripts

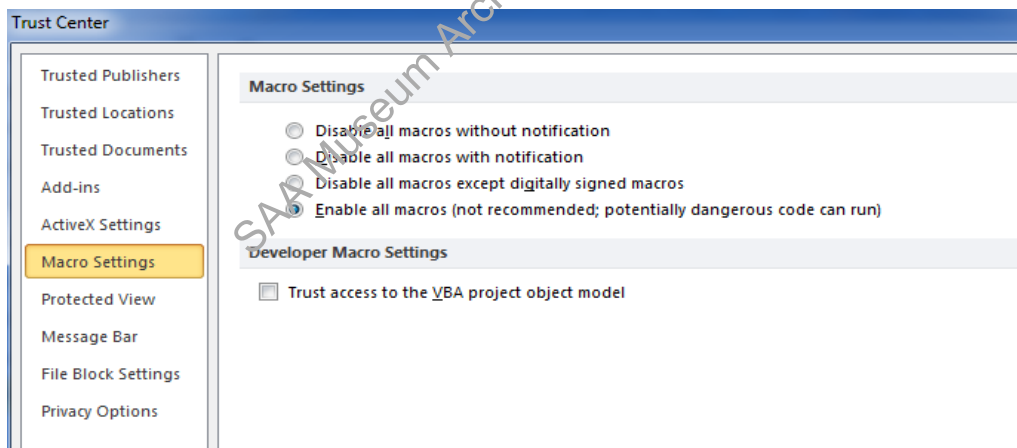
1. Delete Title, Header and Footer, and preamble
  - Save a new copy of the "access" transcript with the letter "o" (for OHMS) added to the end of the file name in \\BHS-ARCHIVE01\Archived Digital Assets\Mary\1-OH Collections in the collection folder.
    - Example: [bhs\\_2011.019.095\\_basile-ericka\\_20140604\\_o](#)
  - Delete title, header and footer, and preamble. Create or leave one paragraph break at the top of the first page.
  - If any of the names before the colon in a transcript have an accent mark or were created with a symbol in Word, this may have to be changed to a standard keyboard-typed letter to preserve the bold name formatting that OHMS produces. (The accents/symbols should remain as is in the Access version of the transcript.)
2. Delete Timestamps
  - There are usually timestamps markers every 5 minutes.
    - Example: [00:00] [15:00]
  - Find timestamps by searching colon plus zero - **Ctrl+ F :0**. Delete timestamps.
  - Find remaining timestamps searching for left bracket - **Ctrl+ F [**. Delete remaining timestamps.
  - Check for extra spaces or line breaks created by removal of timestamps. Delete all extra spaces and line breaks, but be sure to keep one space in between periods and the following sentence.
    - *An alternative method to remove all time stamps: enable wildcard searching on MS Word and then type: \[?:?]? in the find field, and nothing in the replace field. Scan the*

list to make sure nothing is being grouped into that that shouldn't be, and then click "Replace all." Make sure that all extra spaces are deleted when you replace them.



### 3. Enable Macros

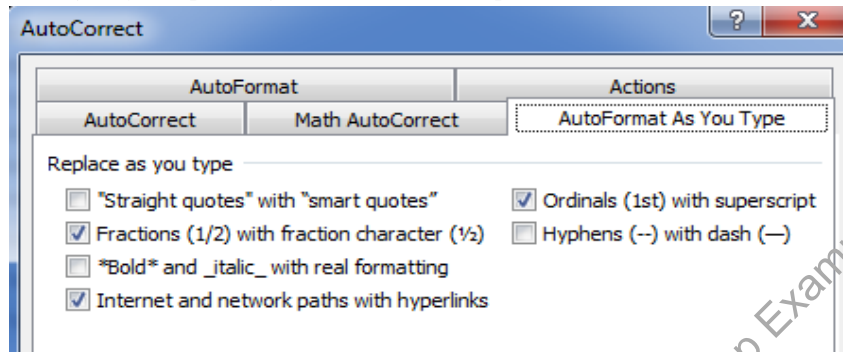
- Click on the **File** tab and select **Options** underneath **Help**.
- In the new Word Options window, select the last option, **Trust Center**.
- Click the **Trust Center Settings** button towards the right of the window.
- Under Macro Settings, select **Enable all macros** and click **OK**.
  - *Note for Macs: Skip the above steps. In the Mac version of MS Word, click the **Word** tab and select **Preferences** from the drop-down menu. Then, click the **Security** button. Either uncheck the box next to 'Warn before opening a file that contains macros' or remember to press 'okay' if the notice pops up while you are configuring for OHMS.*



### 4. Change AutoCorrect Functions

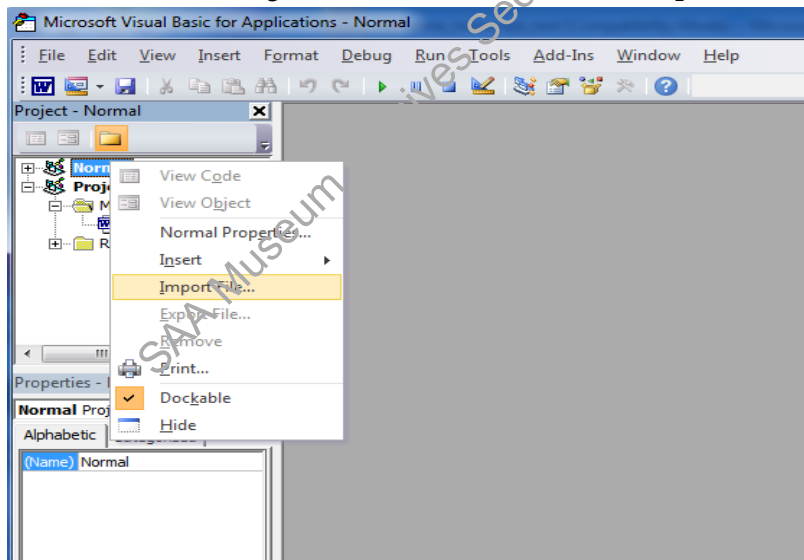
- Click on the **File** tab and select **Options**.
- In the new Word Options window, select the third option, **Proofing**.
- Click the **AutoCorrect Options** button.

- In the AutoCorrect window, under the tab, **AutoFormat As You Type**, unclick the boxes **“Straight quotes” with “smart quotes”** and **Hyphens (--) with dash(-)**.
- Still in the AutoCorrect window, move from the tab, **AutoFormat As You Type** to **Autoformat**. Repeat the process: unclick the boxes **“Straight quotes” with “smart quotes”** and **Hyphens (--) with dash(-)**.
  - *Note for Macs: ‘AutoCorrect’ can be found in the drop down menu under the **Tools** tab. After you open it, follow the same steps as in the PC version.*



## 5. Run Macros

- Under **Developer** tab, Click **Visual Basic**.
  - If you do not have the **Developer** tab, go to the **View** tab and select the **Macros** button on the far right side. From the pull-down menu, select **View Macros**.
  - Under **Macro name:** enter **OHMS\_macro** and click **Create**.
- In the new window, right click on **Normal** and select **Import File**.



- Under the **Files of type** pull-down menu, select **All Files (\*.\*)**.
- Select **OHMS-Transcript-Macro.bas** and click **Open**.
- Close out of the Visual Basic window.
  - *Note for Macs: The Mac version of MS Word does not appear to allow you to import the file. Open ‘OHMS-Transcript-Macro.bas’ as a plain text document and then copy and*

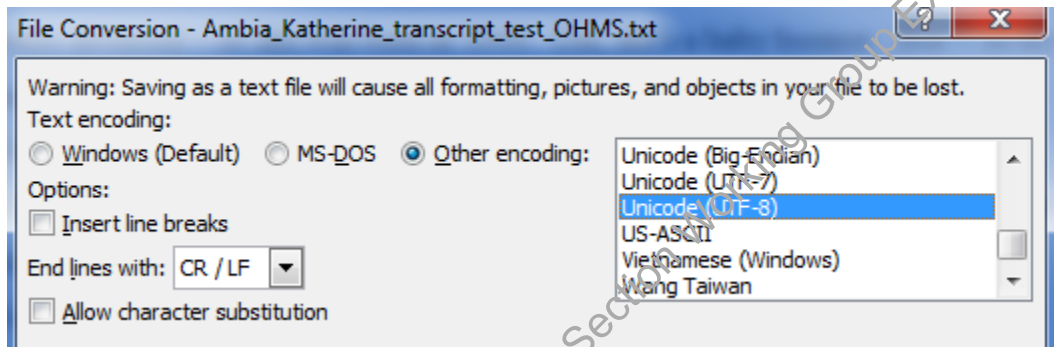


*paste the entire thing. (Shortcut: press Command+A on the keyboard, and then press Command+C.).*

- Still under the Developer tab, click the Macros button.
  - If you do not have the **Developer** tab, go to the **View** tab and select the **Macros** button. Click on **View Macros**.
- Select **Ohms\_textprep\_final\_final** and click **Run**.

#### 6. Save Two Copies

- Click on the **File** tab and select **Save As**
- Enter file name with the letter "o" (for OHMS) added to the end of the file name.
- Under the **Save as type** pull-down menu, select **Plain Text** and click **Save**.
- **Save into** \\BHS-ARCHIVE01\Archived Digital Assets\Mary\1-OH Collections in the collection folder.
- In the File Conversion window, select **Other encoding**, then Unicode UTF-8. Click **OK**.



- Click on the **File** tab and select **Save As**.
- Under the **Save as type** pull-down menu, select **Word Macro-Enabled Document**.
  - *Note for Macs: In the coming steps, if you have trouble uploading the Plain Text document to OHMS, open it in TextWrangler and save again as Unicode UTF-8.*

#### Creating Records

- Login into OHMS: <https://ohms.uky.edu>.
- In the **Interview Manager** tab, click **New**.
- Most OHMS metadata fields are not visible to the public. Only enter information in the following fields:
  - Title
    - Enter **Oral History Interview with [Narrator's First name Last Name]**
  - Accession Number
    - Enter **Asset ID**
  - Interviewee
    - Enter **First Name Last Name**
  - Interviewer
    - Enter **First Name Last Name**
  - Interview Date

- Enter **Year [YYYY], Month [MM], Day [DD]** of interview
  - Media Format
    - Select **Audio**
  - Media Host
    - Select **Host**
  - Rights
    - Enter "**This transcript and audio recording is hereby made available for research purposes only. For more information, contact Brooklyn Historical Society at [library@brooklynhistory.org](mailto:library@brooklynhistory.org).**"
    - Note: If you do not have a transcript to upload with audio in OHMS then proceed to the rights statement on page 18.
- Click **Save**.

## 2. Upload Transcript

- Find your new record listed in the **Interview Manager** tab.
- In the transcript column, click **Upload**.
- Select the **Plain Text** formatted transcript and hit **Save**.

## 3. Upload Audio

- An easy method of uploading audio to the BHS server is via an FTP. Download an FTP program such as <http://winscp.net/download/winscp555setup.exe>.
- You will be prompted to enter user/ connection information. Enter as follows:
  - FTP username: libraryassets@brooklynhistory.org
  - FTP password: BHSLIB642\$
  - FTP server: ftp.brooklynhistory.org
  - FTP & explicit FTPS port: 21
- This will grant access to the central location for all library assets (brooklynhistory.org/library/assets), including .mp3 files of oral history audio, .pdf files of oral history transcripts, and OHMS .xml files.
- Drag the .mp3 file to upload window. Do not create subdirectories or folders for the assets; they should all be in the assets folder.
- Return to the **Interview Manager** tab in OHMS. Click on **Metadata** in the Metadata column of your record.
- In the **Media URL** field, enter <http://brooklynhistory.org/library/assets/> followed by the file name. This link points OHMS to the audio file on the BHS server.
  - Example: [http://brooklynhistory.org/library/assets/bhs\\_1994.006.32\\_wilson-delone\\_19931110\\_a.mp3](http://brooklynhistory.org/library/assets/bhs_1994.006.32_wilson-delone_19931110_a.mp3)
- Click **Save**.

## Syncing in OHMS

- The best instructions for syncing are found on pgs. 15-17 of the **OHMS\_Getting\_Started\_v2-1-19** manual.
- Practice syncing on a test record.

- After completing the sync, click **Save**.

### Indexing in OHMS

- Follow the "Creating Records" for OHMS instructions above, with the following exception:
- In place of the information for rights metadata as stated above, please use:
  - Enter "**This index and audio recording is hereby made available for research purposes only. For more information, contact Brooklyn Historical Society at library@brooklynhistory.org.**"

### Quality Assurance

- Leave time to review all metadata generated by staff and interns during syncing and indexing. Editing for clarity and consistency is likely to be necessary.

### Link from Finding Aid

- In the finding aid, create a link to OHMS.
- See pages 144-146 in **AT1\_5\_UserManual\_with\_2\_0\_newfeatures** for guidance.
- The extent indicated in a finding aid for a collection of digitized oral histories should lead with digital storage size in gigabytes, in the allotted number of files, total running time, and physical size measured in linear feet and number of boxes.

Example: 46.79 gigabytes in 133 files, total running time: 34 hours, 2 minutes, 59 seconds; 2.5 linear feet in 6 boxes

### XML from OHMS

- XML should be exported from OHMS to the same central location of library assets on the FTP server.
- In the OHMS Interview Manager screen, choose several synchronized or indexed titles and select the batch action "Export Selected Interviews as XML." XML can also be exported one-by-one by clicking the XML link in the export column in the OHMS Interview Manager.
- XML files will likely download to a Downloads folder on your workstation. Follow the instructions above for logging into the ftp server, then drag and drop XML files for uploading to library assets folder of ftp server.

## APPENDIX for narrator outreach:

### Burn Audio CDs

In iTunes, create a narrator-specific playlist of all associated mp3 files. Select Burn Playlist to Disk. After burning, label audio CDs with solvent-free marker. Include the narrator's name, asset ID number, interview number, CD number and Files (A, B, C, and D etc.).

Example: Alicia Ohs - 2011.019.100 - Interview #1 - CD #1 - Files A-B

Example: Alicia Ohs - 2011.019.100 - Interview #2 - CD #2 - File A

Place burned CDs in CD sleeves and then in small, padded mailer.

On a BHS label, write narrator's name and affix label to padded mailer.  
If the narrator requests, mp3 and transcript files can be delivered via the BHS Dropbox account.

#### Create Narrator Instruction Letter and Web Release

To generate a letter, use the **Narrator Instruction Template**.

In the letter, be sure to change the date, name of narrator, name of interviewer and date of interview.

Open **Web Release Template** and fill in narrator's name, accession number and date.

Print letter and release form on BHS letterhead.

#### Send to Narrator

Assemble a packet for the narrator in large brown mailer. Package should appear professional and official. Include the following:

A copy of the "unedited" transcript.

Narrator instruction letter.

Web release form.

SAA Museum Archives Section Working Group Example