

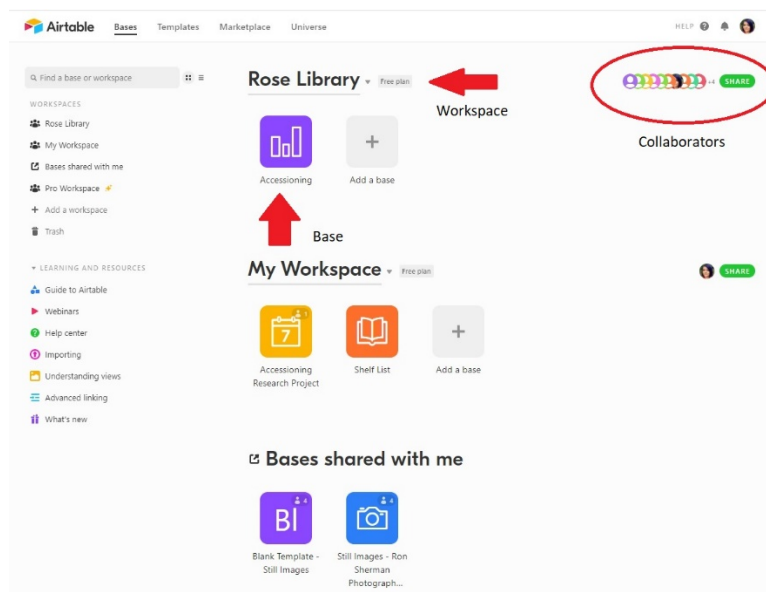
### Airtable

<https://airtable.com/>

*Reviewed by Meaghan O’Riordan, Stuart A. Rose Manuscript, Archives and Rare Book Library, Emory University*

Airtable is a web-based application that archivists can use to organize and clean data, as well as establish collaborative workflows. Airtable was founded in 2012 by Howie Liu, Andrew Ofstad, and Emmett Nicholas on the “. . . belief that software shouldn’t dictate how you work—you should dictate how it works.”<sup>1</sup>

Airtable combines the features of a database with the layout of a spreadsheet. Users start with a workspace, which is a collection of bases shared among a team of people. A base is a database that contains information for a specific project or workflow and comprises one or more tables. A table is where the data lives and appears as a “Grid” initially, which is a traditional spreadsheet view. The purpose of having multiple tables in one base is to allow data to be linked among tables within the same base, like multiple sheets in a spreadsheet. Finally, a record is an individual item in a table.



*A screenshot of the Airtable Workspace.*

<sup>1</sup>Airtable, “About Us,” accessed September 30, 2020, <https://airtable.com/about>.

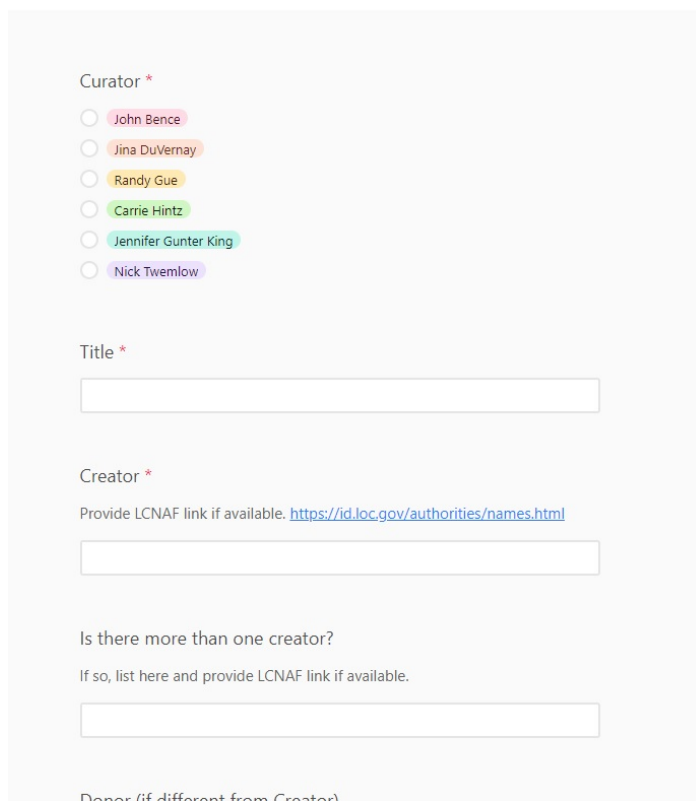
Three Airtable features work together to make it robust: views, filters, and sorting. Views let you customize how information is displayed in a table while keeping all the data intact. For example, archivists can have a table containing information about every new acquisition but then create additional views within that table using filters, sorting, and hidden fields. They can have a view for just purchases if they have a column that designates the type of acquisition by creating a view that filters that field on the purchase designation. This eliminates copying and pasting data into multiple sheets in a spreadsheet or having to rely on sorting by different fields to view specific configurations of the data. It keeps the data updated—every new record added to the table labeled as a “purchase” will appear in this view and intact. Views also allow for different collaborators to have their own personalized view without having to be responsible for keeping data updated. Finally, views allow people to see information in the table in other layouts besides a grid; there are options for a Kanban view, Gallery view, Calendar view, or Form view.

In addition to views and filters, the sorting feature in Airtable (versus Microsoft Excel) is better at sorting data like Library of Congress call numbers. Prior to adopting Airtable, I created shelf reading lists in Excel for student employees, and, after the alphabetical characters, the call numbers were sorted 1, 10, 100, 1000 instead of 1, 2, 3, 4, etc. I tried to fix this using multiple methods, but because call numbers are a combination of letters and numbers, it was not possible. Airtable natively sorts them correctly. It is also easier to sort by multiple fields in Airtable compared to other software.

Forms are another great functionality of Airtable. A form can be created from any table to enable collaborators to add information without having to fill out a spreadsheet. Instead, they can answer questions in a nicely formatted, web-based form that populates the grid view.

## Potential Acquisition Report Form

Complete this form for acquisitions under consideration and for discussion during monthly curators' meetings.



The screenshot shows a form titled "Potential Acquisition Report Form" with the following fields and options:

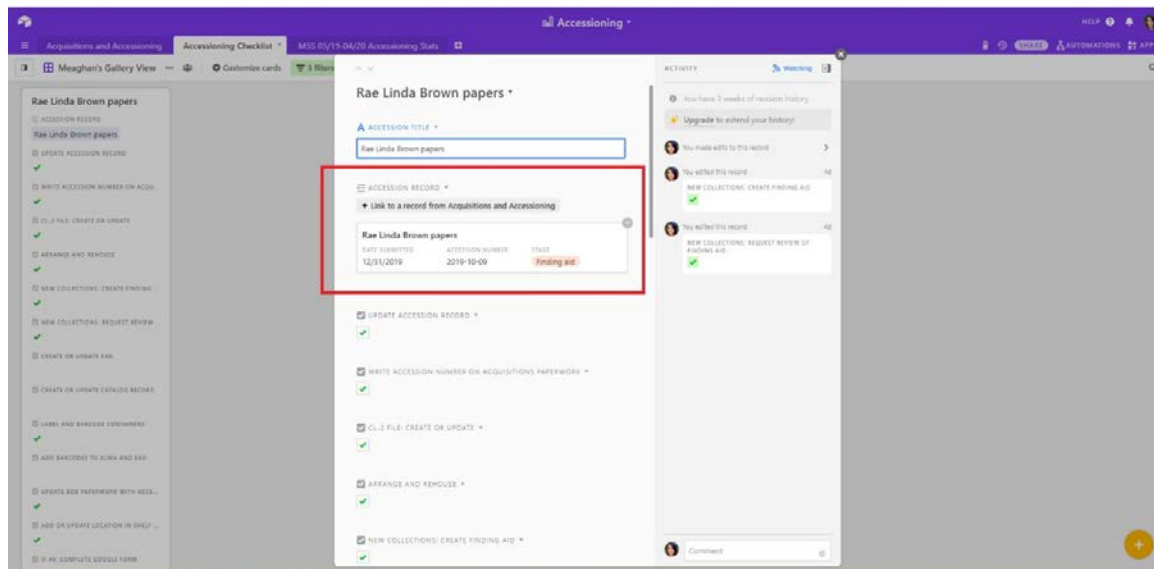
- Curator \***: A radio button selection with six options: John Bence, Jina DuVernay, Randy Gue, Carrie Hintz, Jennifer Gunter King, and Nick Twemlow.
- Title \***: A text input field.
- Creator \***: A text input field with a note: "Provide LCNAF link if available. <https://id.loc.gov/authorities/names.html>".
- Is there more than one creator?**: A question with a sub-note: "If so, list here and provide LCNAF link if available." Below it is a text input field.
- Donor (if different from Creator)**: A text input field.

*A screenshot of the Rose Library's Potential Acquisitions Report Form created in Airtable.*

At the Stuart A. Rose Manuscript, Archives and Rare Book Library at Emory University, we have implemented Airtable for our acquisitions and accessioning workflow. First, the curator completes an Airtable-created Potential Acquisitions Report Form that populates the "Potential Acquisitions" view. The views in this table are controlled by filtering data with the "Stage" field. All responses to that form will stay in the Potential Acquisitions view until the stage field is changed when we receive the materials. At that point, the record will disappear from the Potential Acquisitions view and appear in the "Collections Received" view.

This continues throughout the workflow until the stage field is changed to "Completed," and the record moves to the "Completed Accessioning" view. Using Airtable for this workflow allows the curators to transfer information directly to archivists in the Collection Services unit. Previously, curators completed a static form, requiring archivists to re-enter information into their systems. Airtable eliminates this duplication.

In this same base is a table for the “Accessioning Checklist,” which uses the Gallery view to allow staff accessioning new collections to use checkbox fields to go through the steps they take on any given acquisition. Rather than copying and pasting collection information from the Acquisitions and Accessioning table, there is a linked field between the two that allows the information already in that table to be viewed from the Accessioning Checklist table.



A screenshot of an accessioning checklist created in Airtable for the Rae Linda Brown papers.

Airtable can also be used for project management. The Rose Library created a spreadsheet that includes every container in our holdings in order to compile container profile and location information to eventually match containers imported from EAD into ArchivesSpace.<sup>2</sup>

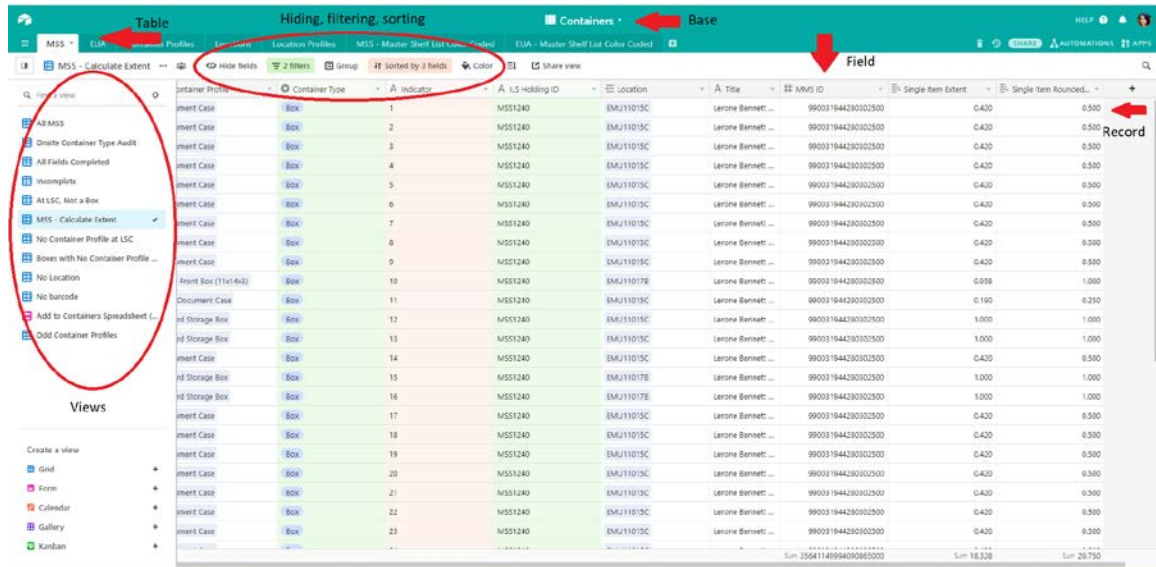
Previously, the container profile information was only available on paper barcode files, and the location information is in a spreadsheet that is often not granular enough for ArchivesSpace. After the first phase of gathering as much information as possible from the barcode files, several thousands of items still needed either container profile or location information.

There are currently twelve views in the manuscripts table for the “Container” spreadsheet in Airtable. The first view has no filters and displays every container in

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<sup>2</sup> “A Top Container is typically the *physical container in which your material would circulate to the reading room*. It is important to remember ArchivesSpace manages Locations, barcodes, and ILS tracking functions through Top Containers, since they are the units that circulate. ArchivesSpace uses the top containers to display and track the physical boxes, folders, and other containers within which your archival materials are housed,” Orbis Cascade Alliance, “ArchivesSpace Containers & Locations,” ArchivesSpace Documentation, accessed October 12, 2020, <https://www.orbiscascade.org/archivesspace-containers-locations/>.

our holdings. An “Onsite Container Profile Audit” view only displays materials that are onsite, and it is sorted by location so that someone can walk through each aisle to check that the container profiles recorded are correct. There are views for complete and incomplete items. There are separate views for items without container profiles at our onsite and offsite facilities. Airtable provides multiple ways of viewing, so I can create new views based on different projects I want to complete.



A screenshot of the MSS table in Airtable, with notes defining parts of a Grid view.

Finally, another extremely helpful feature of Airtable is how well it interacts with other software. I currently have automation set up with [Zapier](#) and [MS PowerAutomate](#), so that when curators submit the Airtable-based Potential Acquisitions Report form, a nicely formatted Word document version appears in a specific folder in our cloud-based shared drive structure. I have also been a part of Airtable bases that are linked to Slack and email. For example, if I wanted to receive an email or Slack notification when the stage field is changed for a record in the Acquisitions and Accessioning workflow base, I can set up Airtable to do that automatically. I currently receive an email when a curator submits a Potential Acquisitions Report form.

While my role at the Rose Library does not involve coordinating events or social media, I am the Managing Editor for a blog called [AllGo](#), which is where I was first introduced to Airtable. For archivists who manage public services, Airtable is an excellent tool for organizing content, assigning tasks, and scheduling posts. Airtable should be considered for any workflow or project that requires collaboration or manipulating a significant amount of data.

Airtable has only a few drawbacks for archives. First, it only accepts and exports CSV files rather than Excel files. This is a problem because CSV often reformats dates into number strings or reformats number strings into dates. Additionally, the file format

does not accept multiple sheets in a file. So, if there are multiple tables in a base then each one will export as its own spreadsheet rather than as multiple sheets in a file. Second, archivists must be very cautious about what field they use for the first column because there are limitations on what type of field it can be, as the first column will be the anchor for a record. Third, the amount of space in the free version of Airtable is quite limited—it only allows 1,200 records per base. Airtable does offer a fifty percent educational discount on their paid services, billed annually, so it is possible for academic institutions to implement a more advanced version without too high of a cost.<sup>3</sup> In addition to more space and a longer revision history, the Pro and Enterprise versions include advanced calendar features, custom-branded forms, personal and locked views, password and domain restricted shares, and Airtable’s native apps to build data visualizations like charts and maps.<sup>4</sup> Airtable is always upgrading its features and recently added automation, eliminating the need to use third-party software. Airtable offers excellent [training documentation and tutorials](#) for new users just getting started. Readers can [view a video](#) that I recorded navigating the containers to demonstrate how different features of Airtable work.

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<sup>3</sup> Airtable, “Nonprofit and educational plans FAQs,” accessed October 12, 2020, <https://support.airtable.com/hc/en-us/articles/360008649233-Nonprofit-and-educational-plans-FAQs>.

<sup>4</sup> Airtable, “Simple Pricing,” accessed October 12, 2020, <https://airtable.com/pricing>.