# **BEST PRACTICES FOR POST-PRODUCTION ARCHIVES**

This document was created by *l'Association des recherchistes en audiovisuel du Canada (ARAC) – the Quebec branch of Visual Research Society of Canada (VRSC)* – in collaboration with editors from AQTIS (*l'Association québécoise des technicien.nes de l'image et du son*) and the Group of 13 (*Groupe des treize*).

## To be used by archivists, researchers, editors, directors and producers

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## 1. THE IMPORTANCE OF A PRE-EDIT MEETING

Before the production is too far along or, at the very latest, before editing begins, it's a good idea to have a meeting with the producer, director, editor and archivist so everyone is aware of the potential archive needs.

This meeting is also important to establish how you will all work together, potential archives and sources that have already been identified, the production schedule and archive budget, the terms of use, when the first archives should arrive and how much time before masters are needed.

Usually, at this stage, the archivist will start identifying the number of images which can come from one or another source. The earlier this is done, the sooner the archivist can begin negotiating preferential fees from sources that provide more than one image.

## **1.1 Meeting Objectives**

- a. Clarify the type and number of images as well as potential sources for the final edit.
- b. Establish a numbering system for the archives.
- c. Establish and clarify each person's role vis a vis the archives. For example: each image or footage must pass first to the archivist to be given a name and number (offline or online) and registered in the archive data base (the goal here is to avoid finding internet images and footage in the locked picture which are impossible to track down and get released).
- d. Establish a realistic schedule for the archive research and acquisition.
- e. Determine your communication tools between the editor and the archivist (EDL, Google Drive, Excel data base, or others)
- f. The process for dealing with new archives that come in during the edit.
- g. Decide and discuss the format of images during editing (offline), the format needed for on-line (ordering masters) and the format of the final production delivery (if different).

# 2. RESEARCH AND ORDERING CRITERIA FOR AUDIOVISIUAL ARCHIVES

## 2.1 Limitations and constraints when researching and 0rdering archives:

Soon after the famous first meeting, the archivist should make sure the editor and producers know about specific limitations regarding archive sources. For example, in North America, many archive houses require a minimum order of 30 seconds, whereas in Europe, there's a 60 second minimum, so the archivist will try and order images from a few rather than many sources.

It might also be preferable to order certain images by content group because of other restrictions imposed by some suppliers (e.g. INA and NFB each have a 30 second minimum within certain collections of images).

In other cases, one might find very cheap, public domain or even free archive images,

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only to realize that it can take a very long time to order and receive them – sometimes weeks, sometimes months (examples are the Quebec National Archives, Library of Congress and National Archives of Canada).

#### 2.2 Images downloaded from YouTube and other internet sources

Images from Youtube, Vimeo and other internet sites can be an excellent reference, but finding the source of the image and who owns the rights is not always an easy task. Often, on Youtube, people will post images and footage without specifying where they found it. Back-tracking is not always successful.

Once an image from the internet is included in the cut, it must be sent immediately to the archivist, along with the **exact URL address**. The archivist will then try to find out about the rights to this image and, if that's not impossible, find an equivalent (or maybe even a better) image from a more legitimate source already contacted.

## 2.3 Public Domain / Creative Commons

A work or image is considered public domain in Canada 50 years after the death of the person who created it... and 70 years after his or her death in Europe and the U.S. So, is everything in the public domain free for use? ABSOLUTELY NOT!

One must always double check the status of the work because there can actually be residual rights, especially if the person is very well known. And even when images are in the public domain, there are often access fees and reproduction costs that can be the equivalent of rights tariffs. This is most often the case when the images come from private collections or Museums and Libraries.

For example, a Brueghel painting is itself in the public domain but a photographic reproduction is not and the Museum which acquired the painting holds the right of reproduction for which, in the majority of cases, they will charge you to use.

Another example concerns licensing often seen with works from Youtube and Vimeo: Creative Commons. At first glance it seems that this license allows free use and perpetual rights for the image involved. Actually there are 6 different types of Creative Commons licenses covering different types of usage: commercial, non-commercial, academic, etc. There's even a license for "Adaptations" where the adaptation must be authorized for use along with a license for the original work.

This is all to say that often what producers/directors/editors feel is the ability to use images for free and forever under Creative Commons is not true for the majority of cases.

## 2.4 Regular review of edited versions BEFORE picture lock.

Establishing a dialogue between the archivist and the editor during the entire editing process will allow more time to find images, solve problems and come up with alternative images instead of having unfortunate surprises at the end (that image the director loves is just too expensive). This means it's important for the archivist to see several versions of the

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film before the picture is locked. This will allow him or her to point out potential rights, access and financial problems before the editing door is closed.

## 3. EDL (EDITLIST) AND DATA TRACKING

The EDL list contains the minimum amount of information necessary for the archivist to understand where and how the archives are being used in the project.

- Which archive? (designated number, supplier code)
- Which part of the archive is being used? (source TC)
- How long is the archive on screen?
- Where is the archive located? (TC in project)

It is, of course, important that the information given about the clip in the EDL is accurate (name of clip, name of source, time code) before giving the EDL to the archivist. Depending on the software being used in the editing process, the EDL report might be more or less detailed (see Annex).

Regardless of who finds and obtains a particular archive, all images imported or digitized into the system, must be entered into an Excel spreadsheet. This Excel spreadsheet is created by the archivist and each image should have the same name and information as what is in the editor's system (Source File columns for video, photos and cassettes). If the editor and archivist are in regular contact (remember 2.4) then it will be easier to confirm that the information on the EDL handed over to the archivist matches the information he or she has on the Excel sheet. (See Annex A for managing this process with an Avid edit.)

The archivist will use these EDL/Excel reports to figure out which archives are coming from which sources, how many seconds are being used and begin the negotiations of license fees. So the EDL is actually the archive "bible" for knowing who will supply what

The more information contained in the EDL and Excel report, the simplier and more quickly it will be to make the final orders, negotiate the price and get prompt delivery.

## 3.1 Labelling archives (files and collections) during the edit:

Ideally, the labels given to archives, files, and suppliers should be done by the archivist when he or she first receives the images. The editor would then use that same classification system for archives they find or receive. If this is done, there will be no confusion about which archives have been used where and therefore no surprises during the final ordering of masters.

It's important that editors understand how important it is to discuss the organization and labeling of archives with the archivist BEFORE starting to edit and to keep the categorization on track from the beginning of digitizing throughout the entire project.

#### \* Examples of labels & categories :

400-SRC for Radio-Canada, 301-INA for Institut National de l'audiovisuel, etc.

The item or file can also include the identifying number from the Supplier source (which often has a code for a cassette or digital file, ex: **VM0234510**). If the editing system

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permits more description characters, a word or two describing content is helpful: **400-SRC-Guantanamo-Kadar**.

Some editors find it useful to also identify the archive format. For example:

- **UHdCam001** (U for the project "Underwater", HdCam is the format, 001 is the number given to that particular archive)

- **TCas027-02** (T is the project "Tonka", Cas is a cassette format, 027 is the number given to that cassette and 02 explains that it's the 2<sup>nd</sup> archive on that cassette)

- **GFileAP998765** (G is the project "Greening", File is the format, AP998765 is the number given to the archive by Associated Press - AP)

Whatever numbering system or organization method you use, each archive will be listed in the Excel file with at least an original number (from the source), the name of the source and a description of the archive content.

That said, the guidelines you use will vary from project to project depending on the preferred categorization method of the archivist and the editor, the constraints of the editing system and the details needed within the project.

# 4. PICTURE LOCK

## 4.1 Ordering Masters in broadcast format:

It's a good idea for everyone (producer, director, editor) to know the schedule and possible delays the archivist foresees regarding ordering and receiving masters, fee negotiations and final license paperwork. There must be a reasonable amount of time between the picture lock, the online and the final mix. Certain images and music might have to be replaced if there's not enough time to complete the ordering process.

# 4.2 Ordering the correct format:

To insure that the master is in the correct broadcast format, the editor needs to tell the archivist if the final project will be in 24fr/s (24 frames per second), 25fr/s or 29fr/s, as well as what codec (Prores 422) in HD. If this has not been clarified, the archivist should check with the technician in charge or the editor before ordering any masters.

# 5. ADDITIONAL INFORMATION

Archival rates can vary widely depending on the rights you need to acquire. It's important that the producer has a realistic budget for archival research time, transfer costs and territory limitations. It's also important that the editor knows the constraints of certain types of archives (e.g. most suppliers will not release footage which shows journalists on screen, so better not to include such clips from the beginning).

These guidelines are strictly enforced through E&O (Errors and Omissions) Insurance which all producers must purchase. This policy requires that the people in the film have signed a release and that all archive images, footage and music are licensed. E&O insurance protects both broadcaster and producer against litigation for using unlicensed material.

## 1- Working on an Avid project

Make sure that archive source names within the Avid system correspond to the archive source names in the Excel file, i.e. both the archivist and editor should be using the same naming system for all clips and photos (ideally, the clip number should be in the first part of the clip name so that it is easily identified when an EDL is produced).

Two examples of an archivist's Excel charts:

Item	TC In	TC Out	TC In Source	TC Out Source	Total (sec)	Description	Туре	Source	Notes
455-NFB	10:00:00	10:00:25	1:05:20	1:05:45	25	Opening credits for convention	Video	NFB	
501-G&M	10:02:35	10:02:41			6	Globe & Mail headline: Archivists and Editors Meet, 25 Feb 2015, p1	newpaper	Globe & Mail	
351-BANQ	10:03:00	10:03:15			15	Photo of archivist - Marie Josee	Photo	BANQ	
517-NFB	10:03:16	10:03:26	1:00:00	1:00:26	26	Pedestrians on Mount Royal	Video	NFB	
Total									

TC In Edit	TC Out Edit	TC In Source	TC Out Source	Total (sec)	Clip Name	Description	Source	Notes
00:00:00:00	00:00:09:05	10:20:17:28	10:20:27:04		SRC-0262700	Copenhagen Summit - Canada receives award	SRC	
00:00:09:06	00:00:17:00	00:02:25:07	00:02:33:00		INA-4080615001003	Copenhagen Summit	INA(F2)	
00:00:34:22	00:00:35:01	00:07:46:23	00:07:47:28		INA-4499006001005	Climate change presentation during dinner	INA(F3)	
00:00:45:16	00:01:03:06	01:00:00:00	01:00:17:15		SRC-AV658	PC Minister announces Kyoto plan	SRC	

An Avid Bin example with archives on cassette (Tape column):

An Avid Bin example with archives from cassettes (Tape column):

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0	Archives Cassettes								
Brief	Text Frame Script								
	Name	Start	End	Duration	Tape	Tracks			
	MonOncleAntoine Extrait 01 Match Canadiens Nordiques 01	12:00:52:00 18:20:36:00	12:06:40:00 18:24:26:00	5:48:00 3:50:00	ONF603560 VM0234510	V1 A1-2 V1 A1-2	*		
	og ARCHIVES TAPE		IIII	_			•		

An Avid Bin example with photo and video archives from digital files (Source File column):

00			* A	rchives Video	Photos						
Brief	Brief Text Frame Script										
	Name	Tracks	Start	End	Duration	Source File					
	Patrick Roy VIP Fromagerie Suisse Enquete_extrait 01 Maurice Richard Coupe Stanley Photos_MonOncleAntoine 01	V1 A1-2 V1 A1-2 V1 A1 V1 V1 V1	01:00:00:00 01:00:00:00 01:00:00:00 01:00:00:00 01:00:00:00	01:01:15:21 01:00:13:07 01:02:01:11 01:00:30:00 01:00:30:00	1:15:21 13:07 2:01:11 30:00 30:00	4035_SRC_Canadiens.mov 30102_INA_Suisse.mov 4006_SRC_Gantanamo.avi LTE_0018.jpg 0NF_Photo_Jutra_006.jpg		*			
8	Log BASIC ALL.1 🜾						+				

# 2- Producing an EDL.

**2.1** When the editor or assistant editor wants to produce an EDL from the Avid software, they have to first isolate the archives onto a specific track (see the V2 pink track below as an example).



**2.2** From the EDL software manager, before producing the EDL, click on **OPTIONS** et adjust the settings as seen below. Under the heading "Master List", choose File 32 (EDL File Type) and Tape or File Name (Reel ID Type):

\varTheta 🔿 🔘 Ор	otions							
Settings File EDL Documentaire								
EDL Type	File_32 👻							
Switcher 🦲	SMPTE 👻							
Master List Dupe List	Options Comments							
Source TC	Start 👻							
Record TC	TC1 🔻							
Reel ID Type	🖉 Tape or File Name 👻							
Sort Mode 🛛 🗛	(Record In) 🚽							
Pulldown starting frame	Sequence 👻							
Startin	ig Event Number 📃 1							
Starting TC	Sequence Timecode							
Save Settings Rever	rt Settings Update							

🔴 🔿 🛛 Avid E	DL Manager
tie MONTAGE_PICTURE LOCK_MASTER	V2 D
Get Sequence Send Sequence Project Type 1080p/23.976 Source TC Start • Master EDL Sources Dupe List	Active Setting EDL Documentaire Edit EDL Type File_32 • Record TC TC1 •
TITLE:         MONTAGE_PICTURE LOCK_MASTER           FCM:         NON-DROP FRAME           000001         4006_SRC_GANTANAMO.AVI         V         C         0           000002         VM0234510         V         C         18:22:1           000003         000234510         V         C         10:200003           000003         0102_INA_SUISSE.MOV         V         C         01:           000004         ONF_PHOTO_JUTRA_006.JPG         V         C         01:	01:00:42:03 01:00:58:17 01:00:16:04 01:00:32:18 9:09 18:22:37:12 01:00:42:16 01:01:00:19 00:05:11 01:00:08:23 01:01:00:19 01:01:04:07 01:00:13:05 01:00:18:06 01:01:04:07 01:01:09:08

Under Avid EDL Manager, make sure the right track is chosen (V2) and that the EDL Type is always F\_32.

#### 3. The next step

To create the archive spread sheet, you have to manually make the time code columns in an excel sheet. To easily read the EDL list, open the ".edl" in Word with MS-DOS.

The web tool <u>EDL repair (http://www.michaelcinquin.com/tools/edl\_repair)</u> will automatically calculate the archive clip length into minutes/seconds/frames.

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Conversion de fichier - MONTAGE_PICTURE LOCK_MASTER.edl							
Choisissez le codage à utiliser pour rer	ndre ce doc	ument lisil	ole.				
Codage de texte :							
⊖ Mac OS (par défaut)	⊖ Autre	codage :	Occidental (Mac OS Roman) Occidental (Windows Latin 1) Turc (Mac OS) Turc (Windows Latin 5) Unicode 5.1 Unicode 5.1 (Little-Endian)				
Aperçu :							
TITLE: MONTAGE_FICTURE LOCK_MAST FCM: NON-DROP FRAME 000001 4006_SRC_GANTANAMO.AVI 01:00:32:18	'ER V	c	01:00:42:03 01:00:58:17 01:00:16:04				
000002 VM0234510	v	с	18:22:19:09 18:22:37:12 01:00:42:16				
000003 30102_INA_SUISSE.MOV	v	с	01:00:05:11 01:00:08:23 01:01:00:19				
01:01:04:07 00:0004 0NF_PHOTO_JUTRA_006.JPG 01:01:09:08 000000000000000000000000000000000	v 10000000000	c 10000000000	01:00:13:05 01:00:18:06 01:01:04:07				
			▲ ▼				
			Annuler OK				

<u>N.B.</u> Sometimes the Time Code Burn In (TCBI) from the project is embedded in the archive screeners, making it impossible to see the original supplier time code on the archive files or cassettes that you gave to the editor. This will make it difficult to get the time codes you need to make the master archive order to the supplier. If this is the case, it's advised to set up an Excel table that includes a description of the clip length by both the embedded project time code AND the original screener time codes.

If the TC (time code) embedded on the image doesn't correspond to the original TC from the file given to the editor, you can add a separate TC so that the screener TC's match. But this information will only work with the EDLs generated by the Avid.

## ANNEXE B – Managing Archives in Final Cut Pro 7

It is strongly recommended that you use software like <u>Sequence Clip Reporter</u>, which provides the best flexibility when generating usage reports. Below are the various steps for producing an EDL from FCP7.

Make sure that each clip has: a *tape name*, and a timecode. Place all the archives on a single, dedicated track and export an EDL.

🍯 Final Cut Pro	File Edit View M	Mark Mod	lify Sequence	Effects	Tools W
DAWSON, archives Effects     Name     Name     AR     AR	New New Project Open Open Recent Close Window Close Tab Close Other Tabs Close Project	▶ 分第N 第O ▶ 第W ^W	Out Not Set	Media Start 10:00:00:00	Media End 7 10:02:55:28
	Save Project Save Project As Save All Revert Project Restore Project	₩S ☆₩S ℃₩S			
	Import	•			
	Share	ΰжЕ			
	Export	•	QuickTime Movie #E		
	Send To	•	Using QuickT	ime Conv	version
	Batch Export Batch Capture	^C	For Soundtrack For LiveType		
	Log and Capture Log and Transfer Media Manager Reconnect Media Set Logging Bin	₩8 <b>企</b> ₩8	Audio to AIFF(s) Audio to OMF Batch List Cinema Tools Audio EDL Cinema Tools Change List		DL List
	Print to Video Edit to Tape	^ M	Cinema Tools Film Lists EDL		
			XML	as IEXI	

		EDL EX	port Optio	ns					
	itle: Monta	ge_V02							
Form	nat: CMX	3600	÷						
Sorting: Master, Audio Merged +									
Araget Video Track Only (V3)     Omit Transitions     Generic Edits									
DL N	otes								
Conversion     File names      Conversion     Master Comment 4     Conversion     Filters     Conversion     Conversind     Conversind     Conversind     Conversind     Conversion									
udio	Mapping -								
A 1	<ul> <li>None</li> </ul>	O EDL 1	O EDL 2	O EDL 3	O EDL 4				
A 2	<ul> <li>None</li> </ul>	O EDL 1	O EDL 2	O EDL 3	O EDL 4				
	<ul> <li>None</li> </ul>	O EDL 1	O EDL 2	O EDL 3	O EDL 4				
A 3									

EDL Example from FCP7 :

FCM: DROP FRAME 001 15637 V C 06:06:38:20 06:07:33:24 10:00:00:00 10:00:55:02 \* FROM CLIP NAME: AR 012 ONF DB-407 04-215-FG-01 15637.MOV

002 V190003 V C 00:01:10:27 00:01:38:19 10:00:55:02 10:01:22:24 \* FROM CLIP NAME: AR\_003\_LAC\_V19003-0002.MOV

003 15637 V C 06:09:40:11 06:11:13:18 10:01:22:24 10:02:55:29 \* FROM CLIP NAME: AR\_012\_ONF\_DB-407\_04-215-FG-01\_15637.MOV

To copy & paste this information into an Excel file, you can use <u>edl repair</u> (<u>http://www.michaelcinquin.com/tools/edl\_repair</u>) from Michael Cinquin to read the duration of each clip.



Sequence Clip Reporter is a useful tool that allows you to transfer a Final Cut Pro 7 sequence quickly into an Excel table. Then you can add a clip name, notes, markers, text, etc.

Here's a short video explaining how it works: (https://drive.google.com/file/d/0B2YUPYHTrO5aYIIxRDdLSVdncWc/view)

And here's an example of an Excel report with clip names and durations: <u>https://docs.google.com/spreadsheets/d/1aHOiDzgQbE2p1qQ7OYcR2oK\_0BSHt0\_rmIKHxL</u> <u>OLm4Y/edit?pli=1#gid=732785022</u>

# ANNEXE C – Managing Archives in FINAL CUT X

## **Roles and Producer's Best Friend**

Usng the "Roles" function

(<u>https://support.apple.com/kb/PH12649?viewlocale=fr\_FR&locale=en\_US</u>) in FCPX allows you to quickly isolate the archives from other media within one timeline:



#### With Producer's best friend

(http://assistedediting.intelligentassistance.com/ProducersBestFriend/), you can then generate an Excel list (from "export an XLS from FCPX) with information such as source, clip name, duration, etc. However, it's not possible to export images with this software.

#### **Primaries Exporter**

With software like <u>Primaries Exporter (http://www.primariesexporter.com/)</u> you can export images from the timeline into an Excel or HTML document. This program also permits exporting an individual sequence of clips to use as a reference for ordering or negotiation.

However, while testing this software during the creation of this document, we didn't find it particularly easy to use and we experienced several problems while trying to export information. (Hopefully, updates will help some of these problems.)

#### **Chapter Markers**

With FCPX, it's possible to export a Quicktime with Chapter Markers. This helps the archivist to quickly find the places where archives are used.

Choose the Chapter Marker Option during export.

✓ Include chapter markers

When you open the Quicktime video, you can move easily from one marker to another (see screen grab on following page).



## **ANNEXE D – Summary of Available Tools**

ΤοοΙ	Use/ Notes	Platform
Final Print	Generate a PDF or print a list of clips and Markers (default function on Avid)	FCP7
Sequence Clip Reporter	Complete Excel report (with the possibility of including images)	Final Cut 7, Adobe Premiere
EDL to subcap (website)	Allows the calculation of a marker's duration	Avid
Producer's best friend	Complete Excel report (without images)	FCPX
Primaries Exporter	Excel or HTML report with images	FCPX
CatDV	Archive management tool which communicates with Avid, FCP7 and FCPX	