A (Web)Site for Sore Eyes: Creating a Platform to Store, Share, and Maintain Documentation

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BPE2019
The central platform for the documentation of the Rockefeller Archive Center
Project Origins

June 2017 - New RAC Hires

Ford Foundation grant creates positions for 3 new archivists at RAC:

- Katie Martin - Processing
- Darren Young - Processing
- Hannah Sistrunk - Digital

Project developed to:

- Advance interdepartmental teamwork
- Learn new technical skills
The Rockefeller Archive Center

“The Archives Program of the Rockefeller Archive Center fosters and supports a broad community of users examining the history of philanthropy and its related endeavors.”

- Opened in 1974
- Located in Sleepy Hollow, NY
- Independent operating foundation
- Makes available the papers of the Rockefeller Family, the records of the philanthropic institutions they founded, and the records of other philanthropic organizations
- Collections include: Rockefeller Foundation, Rockefeller Brothers Fund, Rockefeller University, Ford Foundation, Russell Sage Foundation, General Education Board, Henry Luce Foundation, Commonwealth Fund, Hewlett Foundation, etc.
“The Archives Program achieves this mission through four interconnected function areas that manage the Center’s archival holdings from acquisition to accessibility”
RAC
Archives
Teams

Collections Management
Digital Programs
Processing
Reference
Digital Programs Team

- Provides technical leadership and expertise to staff in all program areas
- Takes a collaborative, transparent, and standards-based approach, contributing to open-source systems and communities
- Engages researchers, staff, and donors to understand their needs, prioritize solutions, and produce high-quality and useful tools and services
A Processing Archivist’s Tool

John Smith, Al Jones, and Paul Adams

1. People are responsible for creating the materials and John Smith

2. People are responsible for making the materials and John Smith

3. People are responsible for making the materials and John Smith

4. People are responsible for creating the materials and John Smith

5. People are responsible for creating the materials and John Smith

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9. People are responsible for creating the materials and John Smith

10. People are responsible for creating the materials and John Smith

11. People are responsible for creating the materials and John Smith

12. People are responsible for creating the materials and John Smith

Describing Dates

- Answers the question: When is the content of the file created?
- It can be a single date (like the date of a meeting), or a range of consecutive dates.
- If it is a single date, then it is used as the date assigned.
- If the date is not known, then it is recorded as “unknown.”
- It should be recorded in the following format: 1951 January 1-31

Instance Information

- Instance information should answer the question: Who is the file?
- The instance connects intellectual control with physical control of the file.
- The instance description does not directly equate to the file’s physical description.
- The instance information records the creator or creator who is different from the file.
- The file is identified by a unique ID, which is used to record the file's physical description, the file's content, and the file's location.

Associated Notes

- Notes must often be used at the file level are the conditions of access, and the Physical Description note (which is used to answer the question: What is this physically?)
- Here are a variety of examples of file-level description:

Title: Board of Directors Meeting Minutes
Date: 1947
Instance: Box 1, Folder 1
Associated Notes: Only used when pertinent.

Title: Board of Directors Meeting Minutes
Date: 1951 January 2-31
Instance: Box 2, Folder 2

Title: Board of Directors Meeting Minutes
Date: 1951 January 1-31
Instance: Box 3, Folder 3

Title: Board of Directors Meeting Minutes
Date: 1951 January 1-31
Instance: Box 4, Folder 4

When the instances span multiple boxes, assigning each box to a separate instance allows each box to be designated as a Top Container and each instance to be uniquely identified.
Guide to Processing Collections at the RAC

- 37 pages
- Stored in Word Doc
- Located in multiple locations on institution shared drives
- Multiple versions of document stored on institutions shared drives
- Subject to revisions as processing workflows for certain special formats like legacy digital media develop

- Large document for users to discover and access information quickly and efficiently
- Word Doc format inhibits how content can be shared and used on web
- Complicated structure of network drives makes manual difficult to discover
- Multiple versions in multiple locations increases the likelihood that staff will follow outdated instructions
- Word Doc format inhibits how efficiently content revisions can be incorporated, shared, and tracked
Putting the First Doc on the Web

July 2017 - Project to convert the Processing Manual into a series of webpages

Make the Processing Manual available online by:

- Converting the manual into a format that could be easily shared and managed on the web
- Deciding how the manual should be divided into individual web pages
- Determining how to structure the manual to convey meaning
- Using a static site generator to convert the manual into webpages
- Storing and managing the manual on the web with GitHub
Project Team

Hillel

Darren

Hannah

Katie
Laying the Groundwork:

Learning, Communication, & Collaboration
Format for Structured Documentation for the Web

Markdown

- Lightweight markup language
- Designed to be easy to read, write, and edit
- Plain text format

Process

- Converted processing manual in Word Doc to Markdown using Pandoc
- Edited Markdown files to clean up errors from conversion
- Analyzed structure and organization of manual document and used Markdown conventions to represent that structure
Converting Markdown files into Webpages

MkDocs

- Static site generator geared towards building project documentation
- Uses documentation source files written in Markdown
- Built in development server

Process

- Added Markdown files as individual pages
- Previewed site as developed it
- Applied built in theme - readthedocs
Hosting and Maintaining Documentation on the Web

GitHub

- Web-based hosting service that enables version control
- Ideal for collaboration

Process

- Created GitHub repository to store Processing Manual Markdown files used on MKDocs site
  - https://github.com/RockefellerArchiveCenter/processing-manual
- Created branches to edit files and then merged changes into master branch
Processing Manual Site Becomes Proof of Concept for Larger Docs Platform
A Site for All of Our Documentation

Motivations and goals for making all RAC documentation available on the web:

- Centralized location for staff access and discovery
- Version control
- Use of web conventions to enhance documentation
- Sharing our documentation with larger archives community
- The identification and protection of strictly internal documentation

September 2017 - RAC Docs Site Project begins
What We Needed to Design:

Central interface to discover and access all documentation - A homepage

Pages for the individual documents
A homepage will provide some information on the content and organization of a documentation item and facilitate access to its different subparts.

Welcome to the Processing Manual of the Rockefeller Archive Center, created by the RAC Processing Team. The Manual is divided into three sections:

- **About** - the mission of the Processing Team and information about RAC processing methods.
- **Planning** - instructions on how to get started on a new processing project.
- **Processing** - provides step-by-step instructions for processing archival collections at the RAC.

Contents
Phase II: Processing

The processing phase of each assignment begins with establishing the current arrangement of the material, evaluating the arrangement needs, and crafting an arrangement proposal for the project. The proposed arrangement should then be approved by the Head of Processing and stated in the Project Vitals.

Arrangement

Arrangement is the organizing and sequencing of materials in a collection in a meaningful way. More specifically, it is the process of ordering materials with respect to provenance and original order to preserve context and to attain physical and intellectual control of the holdings.
Turning Our Designs into Templates

Jekyll

- Static site generator
- Takes Markdown files and uses layout templates to generate a website
- Stores Markdown, HTML, and other types of files in a directory file system
- Easier to maintain than CMS like Wordpress
- RAC uses it to create some of its other web properties
Encountering Our First Technical Barriers

- Liquid syntax (https://shopify.github.io/liquid/)
  - ex) `{% for file in site.data %}`
- Jekyll documentation largely for blogs (https://jekyllrb.com/docs/)
  - Not our purpose
- Understanding how the pieces fit together
  - How do our Markdown files work with includes and layouts to produce a homepage and individual documentation webpages?
Docs-theme - First Plan for styling and building site

docs-theme

_processeding_manual

_includes

_layouts

processing_manual.md

side-nav.html

docs.html

docs.rockarch.org/processing_manual/
A Docs GitHub Repo

Config File Requirements

```yaml
public: true
type: "docs"
category: "arrangement and description"
tags:
  - "workflow"
title: "Guide to Processing Collections"
description: "A manual for arranging and describing archival collections."
pages:
  - ["Rockefeller Archive Center Guide to Processing Collections", "index"]
  - ["Planning", "planning"]
  - ["Processing", "processing"]
```
Coding Workflow

Code into development branch or merge branch into development - Changes appear on development site

Development Server

Production Server

Merge development branch into master branch - Changes appear on public site
Templates Complete.
Content Supplied.

Now Features and Styling
Documentation Cards

Guide to Processing Collections
A manual for arranging and describing archival collections.

View Docs  View Source on GitHub

Last updated Tuesday, Apr 16 2019 1:06 PM

Side Navigation

Rockefeller Archive Center Guide to Processing Collections

- Mission
- Method
- Processing Levels
- Processing Project Assignments
- Acknowledgements
- Planning
- Processing
Docs Site Running

November 2017 - First phase of Documentation Project complete

Discuss Docs Site at Archives Staff Meeting

Site is available as a resource for staff to access documentation

Moving to staff adding content to site
Going Public and Involving Staff

Allocate maintenance responsibilities across the RAC

Improve site layout and features

Write better documentation with a focus on structure

Promote RAC documentation to wider archival community
Project Management Goals

- Documentation Team is responsible for updating and maintaining site structure
- Archivists writing documentation should be ultimately responsible for maintaining that documentation on the site
Markdown Workshops

- Two workshops
  - 10 voluntary participants with no prior experience
- Converted policies and workflows prior to workshop
- Issues involving translating a complicated Word document to a web page
  - Structure vs. Style

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```markdown
# Rockefeller Archive Center Reappraisal Policy

## I. Statement of Purpose

A reappraisal policy is an essential component of the Rockefeller Archive Center’s collecting strategy. It establishes an ongoing mechanism for evaluating and strengthening the integrity and cohesion of its archival collections within the framework of the RAC’s approved collection policy.

## II. Guiding Principles

A. The appraisal process constitutes an assessment, while it is the first step towards possible deaccessioning. Reappraisal itself does not always lead to deaccessioning.
B. Reappraisal is a systematic and transparent process that takes into account the RAC’s legal, ethical, and relational obligations.
   1. The process is systematic and well-documented to ensure consistency in the decision-making process and responsible practice.
   2. Actions taken during the process are documented and communicated to donating institutions, individual donors, and staff. Transparency in the practice of reappraisal promotes better collection management.
   3. Donors will be informed by staff of any decisions that involve the deaccessioning of their gift. The mission statements and Archive Center policies will be shared with donors so that they understand why their records are not being kept by the institution.
C. Archivists use professional judgment and established practices to address case-by-case reappraisal details including questions or issues that are not addressed specifically in the reappraisal guidelines.

## III. Rationale for Reappraisal

Reappraisal and potential subsequent deaccessioning is used by the RAC to achieve some of the following objectives:
A. To correct inaccurate appraisals on collections or reassess items that were never appraised.
B. To align accessioned holdings with current collecting policies.
C. To prioritize processing backlogs.
D. To better allocate resources needed for collection maintenance, processing, and preservation.
E. To better assess collection strengths and refine future collecting priorities.
F. To improve overall access to the materials.
```
Version Control Workshop

- Archivists need to feel empowered to create branches, write commit statements, and make and merge pull requests
- Completed pre-workshop activities
  - Created a GitHub account
  - Introductory readings and videos
  - Learned basic GitHub terms and completed simple tasks
- During workshop, split into groups and went through two activities that mimicked working in documentation repositories

Activity #2

1. Find the issue assigned to your Group
2. Create a branch from the master to address issue (name branch for Group)
3. Make changes that address the issue assigned and commit (write a descriptive commit message)
4. Create a pull request comparing your branch and the master branch
Anyone can propose documentation for site

Public or internal?

Changes are suggested via GitHub pull request and must go through a review process
Documentation Management
Card Sort Activities
Homepage Redesign

October 2018 - April 2019

Goals:

- Implement changes to address staff feedback
- Scale down the amount of information on homepage
- Add a filtering function to display only documentation associated with archival lifecycle categories
Homepage Redesign Wireframes
Homepage Redesign: Code Sprints

- Our variation on Agile Software Development practices
  - Continual improvement, responsive to change, planned work
- 3-hour time blocks
- Goal was for each of us to close at least one issue during each sprint
- One 15-minute standup meeting in the middle of every sprint
- Push up any changes to our shared GitHub homepage-redesign branch at the end of the sprint
Accessibility

Websites, tools, and applications are usable by as many people as possible, including individuals who have visual, motor, auditory, speech, or cognitive disabilities.

Web Content Accessibility Guidelines (WCAG 2.0) - provide specific requirements for making web content accessible for everyone.
Accessibility: aXe Browser Extension

Rockefeller Archive Center Documentation

Digitization Guide
- Internal Only
  - Digitization practices and procedures for the RAC staff
  - View Docs
  - View Source on GitHub

Social Media Policy
- A policy for creating and sharing content using the RAC's social media platforms.
  - View Docs
  - View Source on GitHub

Procedures for the Destruction of Archival Holdings
- Internal Only
  - Procedures to prevent improper or inadvertent destruction of holdings of permanent archival value.

Textile Policies
- Guidelines for

Guide to
Accessibility: WAVE Evaluation Tool
Accessibility: Siteimprove Accessibility Checker
Site Promotion

- Initially promoted site in July 2018 blog post
- Promoted site in a series of tweets during SAA 2018
Most Recent Statistics

External Statistics

● Over 1,000 site users
● Most popular month was in August 2018
● Site visitors from Washington, DC, Boston, Los Angeles, London, Seattle, and Chicago
● Most of our users are RAC staff
● Most visited documentation has been the Digital Media Transfer Workflow

Internal Statistics

● 16 staff members have directly converted 20 policies and procedures to Markdown
● 11 new policies and workflows written for the site
Where do we go from here?

- Completed homepage redesign last week
- Conduct usability testing with RAC staff
- Continue making site more accessible
Questions?

Rockefeller Archive Center Documentation Site: [https://docs.rockarch.org/](https://docs.rockarch.org/)

Relevant Blog Posts:

Documentation Site Release: A Tool for Access and Transparency, a Push for Better Documentation Writing:
[https://blog.rockarch.org/documentation-site-release-a-tool-for-access-and-transparency-a-push-for-better-documentation-writing](https://blog.rockarch.org/documentation-site-release-a-tool-for-access-and-transparency-a-push-for-better-documentation-writing)

Project Electron Update: Aurora and Web Accessibility:
[https://blog.rockarch.org/project-electron-update-aurora-and-web-accessibility](https://blog.rockarch.org/project-electron-update-aurora-and-web-accessibility)

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