A Practical Approach to Arrangement and Description with Preservica CE

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Background
Background

WiSPER Project: October 2015 - March 2019

Performance Objectives:

- Ingest a minimum of 75 GB of scheduled electronic records
- Develop public access interface
Background

RFB for "digital preservation software solution" posted January 2018

Received bids from two vendors

Contract with Preservica for Cloud Edition completed March 2018
Roadmap

2. Information Organization
3. Security & Access II: Content Restrictions
4. Metadata
5. External Workflows
Security & Access I: User Roles
Security & Access I: User Roles

Tasks:

- Identify staff who need administrative access
- Configure access roles
Security & Access I: User Roles

Identify staff who need administrative access

Electronic Records Archivist

Program staff

Content curators

Reference staff
Security & Access I: User Roles

Configure access roles
Information
Organization
Information Organization

Tasks:

Research comparable repositories

Think about the needs of internal and external users
Information Organization

Research comparable repositories
Information Organization

Think about the needs of internal and external users
Security & Access II: Content Restrictions
Security & Access II: Content Restrictions

Tasks:

- Determine types of content restrictions
- Integrate content restrictions into information organization
- Create procedures for identifying and restricting content
Security & Access II: Content Restrictions

Determine types of content restrictions

- Content that has a legal restriction
- Content that requires registration and onsite viewing
- Open, unrestricted content
Security & Access II: Content Restrictions

Integrate content restrictions into information organization
Security & Access II: Content Restrictions

Create procedures for identifying and restricting content

**IDENTIFY**
- Retention schedules
- Agency notification
- bulk_extractor
- Visual inspection

**RESTRICT**
- Scripts for moving content to restricted folders
- Scripts for restricting SIPs
Metadata

IS THAT A SPREADSHEET?
Metadata

Tasks:

Choose or create descriptive metadata schema(s)
Integrate with pre-existing description
Create required schema documents
Metadata

Choose or create descriptive metadata schema(s)

Dublin Core

EAD

MODS

Qualified Dublin Core / dcterms
## Metadata

Integrate with pre-existing description

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<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
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Metadata

Create required schema documents

- Schema definition (.xsd)
- Metadata templates (.xml)
- Transforms (.xslt)
- Custom search indexers (.xml)
External Workflows
External Workflows

Tasks:

- Analyze steps needed to arrange and describe content
- Determine which steps can be accomplished by your system
- Create necessary external workflows
External Workflows

Analyze steps needed to arrange and describe content

- Accession records (from physical media or remote transfer area)
- Create accession record
- Arrange, deduplicate, scan for hidden files
- Identify restricted content, apply content restrictions
- Create catalog record
- Create series-, accession-, file-level metadata
- Ingest
- Provide access*

*Non-exhaustive list of steps
External Workflows

Determine which steps can be accomplished by your system

- Accession records (from physical media or remote transfer area)
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*Non-exhaustive list of steps
External Workflows

Create necessary external workflows

Safe accessioning procedures

Arrangement procedures and guidelines

PII scanning procedures

Description workflows (catalog, XML metadata)

Ingest procedure
Security & Access III: Patron Access
Security & Access III: Patron Access

Tasks:

Determine how and where access will be provided

Configure public user interface

Integrate with other systems
Security & Access III: Patron Access

Determine how and where access will be provided
Security & Access III: Patron Access

Configure public user interface
Security & Access III: Patron Access

Integrate with other systems
ELECTRONIC RECORDS PORTAL

https://whs.access.preservica.com/
Challenges

MPLP and born-digital access

Identifying and restricting PII

Item-level metadata!

Is it sustainable?

Network speeds

Staff training and patron access

Increasingly complex content
Questions?
Media credits

Schitt's Creek gifs courtesy of PopTV

Floppy icon created by Markus from Noun Project

People icon created by shashank singh from Noun Project

Scroll icon created by stefano corradetti from Noun Project

Help icon created by Gregor Cresnar from Noun Project

Folder icon created by LAFS from Noun Project

Photo of Wisconsin Historical Society library reading room by Craig Schreiner for the Wisconsin State Journal

"Work Place" by Richard Quinney, from the collection of the Wisconsin Historical Society
Thank you!

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