Workflows, Management Methods & Deliverables

The Data Dream Team

A presentation by Patricia Dragon, Amanda McLellan & Kelly Spring
Project Overview
Data Migration

Archival collection data from Archivists’ Toolkit, spreadsheets, and homegrown databases to ArchivesSpace

○ 5928 subjects
○ 2541 names
○ 5894 accessions
○ 2664 collection records
Unify and Structure

- East Carolina Manuscripts: 4-step process
- University Archives: Visual display based on identifiers
- Medical History Collections: Lone arranger
Frontend Development
Authorities Database

Many names and subjects are shared among these resources and this would keep them more...
Names Workflow

1. Manuscripts staff adds name in ArchivesSpace
2. Cataloger runs report to find added names, corrects name or adds name to authority database if not there
3. Assigns name to appropriate collection in authority database (makes link to ArchivesSpace)
4. Republishes the guide if changes were made
What the Authorities Database Looks Like

Edit > Sparrow, Thomas, 1819-1884

Assign Authority

Full Authoritative Label *
Sparrow, Thomas, 1819-1884

Name Type *
Personal

Single value
Enter the external authority URI
http://id.loc.gov/authorities/names/no2011132763

Compound value
Create a list of labels and external authority URIs
+ Term URI

Existing assignments

Assign to Digital Collections resource

PID *

LCSC Relator URI
http://id.loc.gov/vocabulary/relators/###
http://id.loc.gov/vocabulary/relators.html

LCSC Relator Value

Existing assignments

Assign to ArchivesSpace resource

Search guide title...

Creator Source

Existing assignments

Thomas Sparrow Papers (0001)

ArchivesSpace URI
http://archivesspace.ecu.edu/agents/agent_person/194
- Project Definition
- Project Plan
- Project Outline
- Working Group Charge
Initially, the team wasn’t sure if authorities in ArchivesSpace, and, if so, which would be the role of raising a red flag on our own crew. Instead, we decided to create one central repository for authorities that will service both the digital objects in Fedora and the archival collections in Archivesspace.

https://archivesspace.org/archives/3135
Management Processes
Assessment
<table>
<thead>
<tr>
<th>Scenario</th>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>Test migration.</strong></td>
</tr>
<tr>
<td></td>
<td>● <strong>Time</strong> = Low (4 - 6 weeks)</td>
</tr>
<tr>
<td></td>
<td>● <strong>Staff</strong> = Medium (Few staff &gt; 50% time)</td>
</tr>
<tr>
<td>2</td>
<td><strong>Run checkers over XML files.</strong></td>
</tr>
<tr>
<td></td>
<td>● <strong>Time</strong> = Medium (10 - 12 weeks)</td>
</tr>
<tr>
<td></td>
<td>● <strong>Staff</strong> = Medium (Several staff)</td>
</tr>
<tr>
<td>3</td>
<td><strong>Test import of Manuscript XML files to check for container list errors.</strong></td>
</tr>
<tr>
<td></td>
<td>● <strong>Time</strong> = High (20 weeks)</td>
</tr>
<tr>
<td></td>
<td>● <strong>Staff</strong> = Medium (Several staff)</td>
</tr>
<tr>
<td>4</td>
<td><strong>Subject database ingest to Archivists’ Toolkit database. Migrate to ArchivesSpace.</strong></td>
</tr>
<tr>
<td></td>
<td>● <strong>Time</strong> = Low (4-6 weeks)</td>
</tr>
<tr>
<td></td>
<td>● <strong>Staff</strong> = Medium (Few staff &gt; 50% time)</td>
</tr>
<tr>
<td>5</td>
<td><strong>Name authorities evaluated by node export. Run report showing all names and what fields they are mapped to.</strong></td>
</tr>
<tr>
<td></td>
<td>● <strong>Time</strong> = Low (4-6 weeks)</td>
</tr>
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</tbody>
</table>
User stories

As a user, I want search results highlighted.

As a cataloger, I want changes to be interconnected so that everyone is on the same page.

As an archivist, I want to manage location codes in ArchivesSpace.

As a staff person, I want Aeon to integrate better with ArchivesSpace.
### Someday/Maybe List for Projects:

<table>
<thead>
<tr>
<th>Idea</th>
<th>Description</th>
<th>Does Not Include</th>
<th>Who Would it Involve</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fetch handoff feature</td>
<td>• Provide a way for conservation (and other locations?) to confirm receipt of items</td>
<td></td>
<td>• Lead Developer</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>• Conservation</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Access Archivist</td>
</tr>
<tr>
<td>Fetch – Digitization system integration</td>
<td>• Identify functional requirements for integration</td>
<td></td>
<td>• Digital Team</td>
</tr>
<tr>
<td></td>
<td>• Program Fetch and Digitization according to functional requirements</td>
<td></td>
<td>• Special Collections</td>
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<td></td>
<td>• Update workflow documentation</td>
<td></td>
<td>• HC Archivists</td>
</tr>
<tr>
<td></td>
<td>• Update user manuals</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Training</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fetch – Symphony integration</td>
<td>• When things are in use in Fetch, indicate in Symphony</td>
<td></td>
<td>• Archivists</td>
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<td></td>
<td></td>
<td></td>
<td>• Curators</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>• Access Archivist</td>
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<td></td>
<td></td>
<td>• HC Archivists</td>
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<td></td>
<td></td>
<td></td>
<td>• Lead Developer</td>
</tr>
<tr>
<td>Restricted material in finding aids</td>
<td>• Identify restricted material in finding aids by looking at</td>
<td>Re-processing material</td>
<td>• Archivists</td>
</tr>
<tr>
<td></td>
<td>• Resource note fields</td>
<td></td>
<td>• Curators</td>
</tr>
<tr>
<td></td>
<td>• Container list entries</td>
<td></td>
<td>• Access Archivist</td>
</tr>
<tr>
<td></td>
<td>• Standardize language for restricted materials at each level</td>
<td></td>
<td>• HC Archivists</td>
</tr>
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<td></td>
<td>• Program the PUI to restrict from being able to request anything at the file-level that has the restricted language</td>
<td></td>
<td>• Lead Developer</td>
</tr>
<tr>
<td>Format faceting in the PUI</td>
<td>• Survey the finding aids for format clues</td>
<td></td>
<td>• SpColl Catalogers</td>
</tr>
<tr>
<td></td>
<td>• Most likely in the notes fields</td>
<td></td>
<td>• Archivists</td>
</tr>
<tr>
<td></td>
<td>• Assign formats to the finding aids</td>
<td></td>
<td>• Curators</td>
</tr>
<tr>
<td></td>
<td>• Top 3 relevant only</td>
<td></td>
<td>• Access Archivist</td>
</tr>
<tr>
<td></td>
<td>• Program the PUI to facet for formats</td>
<td></td>
<td>• HC Archivists</td>
</tr>
<tr>
<td></td>
<td>• Update cataloging workflow and/or processing manual</td>
<td></td>
<td>• Lead Developer</td>
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</tbody>
</table>
Ok… but why the “Dream Team?”
Offcourt Skills

- Support
- Open environment
- Creativity
- Commitment
- Communication
Outcomes
Improved Workflows

TWO-STEPPING

The Un-fun way:

Step 1: Paper Data

Step 2: Digital Input

The Fun way:

@Cigar-Doodles/system surveyed
Lessons learned

- Good buy-in from departments
- Plenty of training available to all
- Unsure of final display
- More lessons learned, please
Evaluating success

- Product satisfaction
- Streamlined workflows
- Improved reporting
- External feedback
Tasty takeaways

- Project docs
  - https://github.com/ECULibraries/archivesspace
- Frontend code
  - https://github.com/ECULibraries/ead-frontend
- Container builder
  - https://github.com/ECULibraries/ContainerBuilder
- Authorities code
  - https://github.com/ECULibraries/authority-couch

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Curious about the data?
Want more details about our workflows?

Ask us!

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