ArchivesSpace PUI Overview and Implementation Strategies

October 26, 2017 – Webinar
Presenters

Mark Custer
Yale University

Susan Pyzynski
Harvard University

Annie Benefiel
Grand Valley State University

Leigh Rupinski
Grand Valley State University
Introduction to the ArchivesSpace PUI

Mark Custer: October 26, 2017
ArchivesSpace PUI Enhancement Working Group

Archivists

- Maura Carbone, Brandeis University
- Jessica Dowd Crouch, University of South Carolina
- Mark Custer, Chair, Yale University
- Linda Hocking, Litchfield Historical Society
- Krista Ferrante, MITRE
- Dara Flinn, Rice University
- Matt Francis, Penn State University
- Susan Luftschein, University of Southern California
- Cory Nimer, Brigham Young University
- Elisa Piccio, Caltech
- Cate Putrirskis, Ohio State University
- Susan C. Pyzynski, Harvard University
- Scott Schwartz, University of Illinois
- Mariella Soprano, Caltech
- Claryn Spies, Yale University Library

ArchivesSpace Team Participants

- Brian Hoffman, ArchivesSpace Developer
- Angela Spinazzè, LYRASIS

The Cherry Hill Company

- Rain Michaels, User Interface Designer/Project Manager
- Tommy Keswick, Developer
- Jungleen Bae, Designer
- Cary Gordon, Founder
ArchivesSpace PUI, starting with version 1.0

Instant publication

Search across repositories

Search within a collection

Almost all data entered into the staff interface has somewhere to display

Sorting, Faceting, and Text Filtering

Extensible with theming options and the ArchivesSpace plugin architecture
Help

How can I streamline my search so I don't get irrelevant hits?

How can I refine my results?

What is a "collection subcomponent"?  
Briefly stated, it's a description of a part of a collection. Because archival collections reflect the life of the person or organization who created them, they are often complex. In order to make it easier for researchers to work with archival materials, archivists often break them into chunks and prepare a multi-level finding aid. We provide a summary of the collection, but also provide information on subdivisions within the collection. These are often called "series," and they contain materials that relate to each other, like "Correspondence" or "Financial Records." In addition, most archival collections are stored in folders within boxes. A complete description of a collection will also include folder titles. Folder titles, series names and individual item information, when available, are all "collection subcomponents."

What types of materials are included in the Archives Catalog?

How do I access the materials I see described here?

What systems do you use to run the Archives Catalog?
Summary of Brand New Features, version 2.1

Less jargon, administrative-only labels

Enhanced search results

Ability to search and sort by descriptive dates

Archival inheritance put into practice (also configurable)

More ways to interact with a finding aid (single scroll and container inventory)

New landing pages: repositories, names, subjects, classifications, and more

New action buttons: PDF, Request, and Citation

Ability to search with or without diacritics in both the PUI and Staff Interface

Linked data published as JSON-LD
Summary of Brand New Features, version 2.1

Less jargon, administrative-only labels

**Enhanced search results**

Ability to search and sort by descriptive dates

**Archival inheritance put into practice (also configurable)**

More ways to interact with a finding aid (single scroll and container inventory)

New landing pages: repositories, names, subjects, classifications, and more

New action buttons: PDF, Request, and Citation

Ability to search with or without diacritics in both the PUI and Staff Interface

Linked data published as JSON-LD
Enhanced Search Results

Showing 1 - 4 of 4 Results

**Chesterton, G. K.**

**Chesterton, G. K., 1930-1936, undated**

**Chesterton, G. K. (Mrs.), 1936 Jun**

**Collins (Seward) Papers**
Showing Results: 1 - 4 of 4

**Chesterton, G. K. (Mrs.), 1936 Jun**
- **File** – Box: 3, Folder: 88
- **Call Number**: YCAL MSS 12. Series I
- **Scope and Contents**: Series I, CORRESPONDENCE, (boxes 1-13) is alphabetically arranged. Unidentified correspondence is placed at the end of the series.
- **Found in**: Beinecke Rare Book & Manuscript Library / Seward Collins papers / Correspondence

**Chesterton, G. K.**
- **File**
- **Call Number**: YCAL MSS 12. Series I
- **Scope and Contents**: Series I, CORRESPONDENCE, (boxes 1-13) is alphabetically arranged. Unidentified correspondence is placed at the end of the series.
- **Found in**: Beinecke Rare Book & Manuscript Library / Seward Collins papers / Correspondence

**Chesterton, G. K., 1930-1936, undated**
- **File – Box: 15, Folder: 402**
- **Call Number**: YCAL MSS 12. Series II
- **Scope and Contents**: Series II, SUBJECT FILES, is alphabetically arranged.
- **Found in**: Beinecke Rare Book & Manuscript Library / Seward Collins papers / Subject Files

**Seward Collins papers**
- **Collection**
- **Call Number**: YCAL MSS 12
- **Overview**: The Seward Collins Papers contain correspondence, subject files, business papers, and other papers documenting Collins's editorship of The Bookman and The American Review.
- **Found in**: Beinecke Rare Book & Manuscript Library / Seward Collins papers
Updated Landing Pages, with Archival Inheritance

ArchivesSpace 1.5

Chesterton, G. K. (Mrs.)

Summary
Level of Description: File

Dates
1936 Jun (Creation)

Agent Links
- Chesterton, Frances, 1869-1938

Instances
- Type: Mixed Materials
- Container 1 Type: Box
- Container 1 Indicator: 3
- Container 1 Barcode: 30002091430661
- Container 2 Type: Folder
- Container 2 Indicator: 88

Components
Archival Object has no components

ArchivesSpace 2.1

Chesterton, G. K. (Mrs.), 1936 Jun

- File - Box: 3, Folder: 88
- Call Number: YCAL MSS 12. Series I

Beinecke Rare Book & Manuscript Library | Seward Collins papers | Correspondence, 1920 - 1952 | Chesterton, G. K. (Mrs.), 1936 Jun

Series I, CORRESPONDECNE, (boxes 1-13) is alphabetically arranged. Unidentified correspondence is placed at the end of the series.

Dates
1936 Jun

Creator
- Chesterton, Frances, 1869-1938 (Person)

Language of Materials
In English.

Information about Access
This collection is open for research.

Extent
From the Series: 5.25 Linear Feet (13 boxes)

Expand All

Related Name

Physical Storage Information

Repository Details
Updated Landing Pages, with Archival Inheritance

ArchivesSpace 1.5

Chesterton, G. K. (Mrs.)

Summary

Level of Description

File

Dates

1936 Jun (Creation)

Agent Links

Chesterton, Frances, 1869-1938

Instances

Type    Mixed Materials
Container 1 Type    Box
Container 1 Indicator    3
Container 1 Barcode    30002091430651
Container 2 Type    Folder
Container 2 Indicator    88

Components

Archival Object has no components

ArchivesSpace 2.1

Chesterton, G. K. (Mrs.), 1936 Jun

File - Box: 3, Folder: 88  Call Number: YCAL MSS 12. Series I

Beinecke Rare Book & Manuscript Library | Seward Collins papers | Correspondence, 1920 - 1952 | Chesterton, G. K. (Mrs.), 1936 Jun

Series I, CORRESPONDENCE, (boxes 1-13) is alphabetically arranged. Unidentified correspondence is placed at the end of the series.

Dates

1936 Jun

Creator

- Chesterton, Frances, 1869-1938 (Person)

Language of Materials

In English.

Information about Access

This collection is open for research.

Extent

From the Series: 5.25 Linear Feet (13 boxes)

Expand All

Related Name

Physical Storage Information

Repository Details
Updated Landing Pages, with Archival Inheritance

ArchivesSpace 1.5

ArchivesSpace 2.1

Chesterton, G. K. (Mrs.), 1936 Jun

Series I, CORRESPONDENCE, (boxes 1-13) is alphabetically arranged. Unidentified correspondence is placed at the end of the series.

Dates
1936 Jun

Creator
• Chesterton, Frances, 1869-1938 (Person)

Language of Materials
In English.

Information about Access
This collection is open for research.

Extent
From the Series: 5.25 Linear Feet (13 boxes)
Series I, **CORRESPONDENCE**, (boxes 1-13) is alphabetically arranged. Unidentified correspondence is placed at the end of the series.

**Dates**
1936 Jun

**Creator**
- Chesterton, Frances, 1869-1938 (Person)

**Language of Materials**
In English.

**Information about Access**
This collection is open for research.

**Extent**
*From the Series: 5.25 Linear Feet (13 boxes)*
Series I, *CORRESPONDENCE*, (boxes 1-13) is alphabetically arranged. Unidentified correspondence is placed at the end of the series.

**Dates**
1936 Jun

**Creator**
- Chesterton, Frances, 1869-1938 (Person)

**Language of Materials**
In English.

**Information about Access**
This collection is open for research.

**Extent**
*From the Series*: 5.25 Linear Feet (13 boxes)
Series I, **CORRESPONDENCE**, (boxes 1-13) is alphabetically arranged. Unidentified correspondence is placed at the end of the series.

**Dates**
1936 Jun

**Creator**
- Chesterton, Frances, 1869-1938 (Person)

**Language of Materials**
In English.

**Information about Access**
This collection is open for research.

**Extent**
*From the Series:* 5.25 Linear Feet (13 boxes)
Series I, Correspondence, (boxes 1-13) is alphabetically arranged. Unidentified correspondence is placed at the end of the series.

Dates
1936 Jun

Creator
- Chesterton, Frances, 1869-1938 (Person)

Language of Materials
In English.

Information about Access
This collection is open for research.

Extent
From the Series: 5.25 Linear Feet (13 boxes)
Series I, CORRESPONDENCE, (boxes 1-13) is alphabetically arranged. Unidentified correspondence is placed at the end of the series.

Dates
1936 Jun

Creator
- Chesterton, Frances, 1869-1938 (Person)

Language of Materials
In English.

Information about Access
This collection is open for research.

Extent
From the Series: 5.25 Linear Feet (13 boxes)

Related Name

Physical Storage Information

Repository Details

https://vimeo.com/195457286
Summary of Recommendations not (yet) Implemented

Keywords in context in search results

“Featured Collections” feature

“What’s in our Collections” overview

Ability to change the flattened search results:

- group results by collection
- filter results to digitized objects, complete with optional previews

Bookbag feature

Search Help options and hover text

Search by Identifier, Subject

Enhanced Agent search results (note, dates, etc.)

Ability to sort classification results

Add more PUI customization options to the staff interface
Work Continues

Bug fix for customizing the Public URI (thanks to Thomas Adams for reporting this)

Community update from Steven Majewski (UVA) to enhance PUI PDF exports

Community update from Lora Woodford (Johns Hopkins) to adjust relevancy rankings

Please share your feedback on the listserv, Google Group, JIRA, and/or the Github site!
Who’s using the ArchivesSpace PUI?

By the numbers

- 48 total institutions
- 19 >= ASpace 2.1
- 18 hosted sites
- 16 new sites (since 2016-05)
- 9 sites in beta
- 1 site also connected to Aeon
ABOUT US

Grand Valley State University

Founded in 1960
Carnegie Masters Large University
25,000 students on two campuses in West Michigan
• Allendale & Grand Rapids

Special Collections and University Archives

Part of the University Libraries
Collecting University Archives since 1970s, Rare Books & Manuscripts since 1990s.
Located in it’s own building, apart from main library
Three faculty librarian/archivists, ~20 student hours/week per semester
OUR COLLECTIONS

Size

University Archives, ~ 1400 linear feet
Special Collections, ~ 2300 linear feet
Rare Books, ~35,000 volumes

Subject Areas

Grand Valley State history
U.S. Civil War and slavery
20th Century wars and veterans
Michigan authors and artists
General regional history
OUR HISTORY WITH ARCHIVESSPACE

Before ArchivesSpace

- Legacy MS Word finding aids
- Students had entered accession & finding aid data into Archivists Toolkit
  - Grad Assistants encoded EAD and imported
  - Entered Accessions, Names, Subjects manually
- PDF versions of Word finding aids for manuscript collections were shared online in CONTENTdm digital repository

ArchivesSpace Migration

- Data migrated in 2014 from AT to AS by Lyrasis
- Lyrasis-hosted, single repository instance
- Data still needed cleaning up for sharing resources in PUI
POST MIGRATION CLEANUP

Initial data clean-up, 6 months (just me)
- Standardize note fields and order
- Make sure all names linked in resources were published
- Clean up and merge duplicate subjects and names
- Apply Classification groups to resources
- Publish ~500 resources

Ongoing data clean up
- Linking finding aids to related accessions, marking collections “processed”
- Adding legacy finding aids
- Adding new accessions & processing collections
- Always finding new things to improve
BENEFITS OF USING ARCHIVESSPACE

Fairly streamlined process to get finding aids online
- Single level – manual entry
- Multi-level – Excel to EAD, import DSC to ArchivesSpace, manually enter collection level metadata

One-click publishing of completed finding aids

Finding aids have stable URLs
- I can share or link to from other resources, such as our Digital Collections

OAI-PMH Responder
- Soon all of our resource records will be included in our library’s primary discovery layer (ProQuest’s Summon)
DRAWBACKS

Performing major revisions to finding aids is still problematic.
- Manually in staff interface, OR
- Externally, in Excel, and import new finding aid, unpublishing old, and breaking links

Box location information is buried.

Note fields in the staff interface are not expandable.

PDF exports with default stylesheet are not great.
PUI FEEDBACK

University Library’s user experience student assistants

Search Scenarios
1. Find multiple drafts of an author’s work to compare versions
2. World War II photographs, find both physical and digital versions
3. Women’s activism, find 3 primary sources for bibliography assignment

<table>
<thead>
<tr>
<th>Positives</th>
<th>Negatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prominent citation button is handy</td>
<td>Site is confusing to navigate</td>
</tr>
<tr>
<td>Ability to refine searches</td>
<td>Keyword search results are confusing</td>
</tr>
<tr>
<td>“Once you find a relevant collection, it has lots of great stuff”</td>
<td>Unclear how to access relevant materials</td>
</tr>
</tbody>
</table>
WHAT WE LEARNED

ArchivesSpace infrastructure
• Navigation
• Search tips
• Terminology definitions

Our metadata
• Always can be improved
• Include more information about HOW to gain access to materials in *Conditions Governing Access* note, change note labels to “Access to Materials”

Archival literacy
• Respondents were novice archival researchers
• More experienced with library research, but still not experts
ABOUT MY ROLE

Archivist for Public Services and Community Engagement

- New position, started in February 2017
- Developed specifically with goals of increasing engagement in our materials (via instruction, outreach), particularly from our student population

Interaction with ArchivesSpace

- Primarily on the user side
- Perform basic qualitative metadata QC when I, or our users, find confusing or incorrect metadata

Previous Experience

- Worked as a collection manager/lone arranger
- Adopted ArchivesSpace early on for both public & staff functionality
- Familiarity with how the staff interface works

Students in HST 103
ARCHIVAL LITERACY
PAIN POINTS

- How to get started with searching
PAIN POINTS

- How to understand search results

ArchivesSpace Search Results

Library Search Results

Showing Results: 1 - 29 of 29
QUESTIONS RAISED

1. How do we help new users understand what kinds of resources live in Archives?

2. How do we help remote users understand circulation restrictions on access?

3. How do we increase student understanding of archival jargon?

1. Where can we flex standards to accommodate our user population?
POSSIBLE SOLUTIONS

Provide definitions for commonly misunderstood words or jargon
- Pop-ups like we have in the staff interface when we hover over a section
- Note in the “About” section of the AS homepage linking back to a search tips page or to our Subject Guides

*Keep in mind that if the solution is too onerous, the user is more likely to stop than continue*
SOLUTIONS BEYOND ARCHIVESSPACE

Take advantage of instruction time
- ArchivesSpace built into my classroom
- Introduction to finding resources here

Workshops
- Offer to both students and faculty
- Include other librarians

Subject Guide Tutorials
- Visual walkthroughs of how to use the system
- Glossary

“Learn the Terms” campaign for archival terms

Educate other librarians
The ArchivesSpace PUI Implementation project at Yale or: What we’ve been up to since SAA

Mark Custer: October 26, 2017
Yale and ArchivesSpace

2010: Yale staff participated in the project proposal to merge AT and Archon

2011: ArchivesSpace receives funding from Mellon, and Mark Matienzo is appointed Technical Architect of the Project

2013 May: Yale University becomes one of the 54 Charter Members

2013 Halloween: Yale’s ArchivesSpace Task Force recommends adoption

2014 December: Reach out to LYRASIS and Illinois about redeveloping the PUI

2015 June: Yale’s migration from Archivists’ Toolkit completed

2015 July - December: ArchivesSpace PUI group partnered with The Cherry Hill Company

2017 July 18: ArchivesSpace PUI 2.1 released
ArchivesSpace Public User Interface Implementation Project Charter

Created By: Melissa Wisner
Date: June 12, 2017
Updated: June 12, 2017; Updated July 14, 2017 following LIT meeting; Updated August 8, 2017 final-following sponsors and administrative stakeholders meeting

General project information

<table>
<thead>
<tr>
<th>Project name</th>
<th>ArchivesSpace Public User Interface Implementation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project manager</td>
<td>Melissa Wisner, Library IT</td>
</tr>
<tr>
<td>Project sponsor</td>
<td>E.C. Schroeder, BRBL, Chris Weideman, MSSA</td>
</tr>
<tr>
<td>Project review date</td>
<td>Pre-project review with Library Administration members on 6/9/17; pre-project review with LIT Administration 7/10/17; Project Sponsors and Administrative Stakeholders meeting 8/7/17</td>
</tr>
<tr>
<td>Library goal(s)</td>
<td>Library IT Stakeholders Goal-High-Collaborate with Special Collections to integrate the ArchivesSpace PUI with digital collections and provide functionality for requesting via Aeon.</td>
</tr>
<tr>
<td>Effort reporting areas</td>
<td>ArchivesSpace PUI Implementation</td>
</tr>
</tbody>
</table>

Project purpose

To update and modernize the search and discovery interface for YUL Special Collections, and several related staff workflows for managing the publication of Finding Aids for general use, which have remained static for six years.

Project objectives

- Utilize the ArchivesSpace Community Supported public interface for finding aid presentation and discovery at YUL, and share our experience, knowledge and technical development with our special collection peers
- Receive more frequent technical and design updates to a critical application for special collections, so customer service can keep pace with researcher expectations
- Make support and maintenance of a Finding Aids user interface more effective and efficient by utilizing Lyrasis hosting services
- Configure a DEV, TEST and PROD instance of the PUI application, for more efficient development and testing of the interface by staff
- Improve request management between ArchivesSpace and Aeon
- Improve delivery and access of YUL Finding Aids to international research community
- Implement a User Interface for Finding Aids at Yale that is usable, accessible, and secure

Communication strategy

The complete ArchivesSpace PUI project team will meet monthly, beginning in late July 2017, and continue to meet monthly through the project closeout months, January and February 2018. The leaders of each workgroup, the Project Manager, and the Ex Officio Project Manager will meet weekly during the same period. The monthly meetings will be in person; the weekly updates will use Zoom. There will also be a project documentation and meeting minutes site shared via Google Drive. Each workgroup’s focus will be scoped by the Project Manager and Ex Officio Project Manager, but each workgroup will be individually responsible for determining, documenting, assigning, and completing their relevant tasks, required to ensure a successful implementation of the PUI as replacement to YFAD. Each workgroup will be responsible for communicating with stakeholders, and reporting back to the Project Manager on a weekly basis.

Project Sponsors are needed to secure staff resources for this project, and to facilitate inter-departmental discussions on project assumptions, dependencies, and timelines. Project Sponsors will receive monthly updates, as well as in-time updates about any obstacles impacting deadlines, from the Project Manager. These updates will be provided via email, the project management tool, Asana, and as needed, through attendance at a Special Collections Steering Committee monthly meeting. Project Sponsors should also direct all their questions and communication to the Project Manager.

As needed, additional broader staff presentations will be provided by the Project Manager and Ex Officio Project Manager to inform staff about the new user interface and how it will impact special collections at YUL. The venues may include forums sponsored by the Special Collections Steering Committee, or Library IT Tech Talks.

As the project begins, a Before Action Review will be conducted by the Project Manager. After the completion of the project, and After Action Review will also be conducted by the Project Manager.

Maintenance and operation

After the ArchivesSpace PUI is in production, YAMS will be the Product Owner and Library IT will be responsible for coordinating support with Lyrasis. YAMS and Library IT are also required to develop and maintain technical knowledge of the PUI, and how it needs to and could be utilized throughout library services. The current LIT Service Level Overview for ArchivesSpace will also need to be updated to incorporate support and roles for the public user interface.

Roles and responsibilities: Maintenance and operation

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
<th>% Time</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Owner</td>
<td>YAMS</td>
<td>15%</td>
<td>Documenting and communicating requirements and technical issues to Library IT, and helping manage regular product upgrades with the vendor</td>
</tr>
<tr>
<td>Central Support</td>
<td>Library IT</td>
<td>15%</td>
<td>Responding to and coordinating resolution to technical issues, and helping manage regular product upgrades with the vendor</td>
</tr>
</tbody>
</table>
Fabulous Colleagues

Project Manager, Melissa Wisner

Documentation and Staff Training, Emily DiLeo

Data Cleanup and Enhancement, Alicia Detelich and Christy Tomecek

Technical Integrations, Steven Wieda

Public User Interface Enhancements, Alison Clemens

Usability and Accessibility, Jenn Nolte

Publicity and Branding, Mike Morand
- Improve search results clarity

- Enable call number searches

- Add padding between the Description of Collection field in search results and the found in field

- Determine options for building a “cart” feature for collections and searches

- Update Yale PUI plugin to change what displays on the single-scroll view from “Series Identifier: I” to “Series I”

- Build ways to use links from a record to find related items
- Add YFAD links to PUI
- Add search bar at top of search results page.
- Redo search result color coding
- Improve search drop-down menus
- Discuss adding a discovery page to the front page

- Plan for connectivity with Orbis/location information
- Improve look and feel of site
- Add DL search button (see YFAD)
- Add mechanism for users providing feedback on specific records

- Add a “show collections first” tickbox on the main search page or on the search results page
Progress from Agents and Subjects Working group

Created Data Entry Best Practices

Went from 0 to 31,354 *distinct* URIs
Implementing the ArchivesSpace PUI: A Before Action Review

Plato’s Ship of State metaphor postulates, “A true pilot must of necessity pay attention to the seasons, the heavens, the stars, the winds, and everything proper to the craft.” Accounting for all possible variables, risks, pluses, and minuses is also the mainstay of project management. And if Plato were alive today, you can bet he’d make you put all of it into the project charter!

Before any project begins, the Project Manager (PM) should initiate a Before Action Review, to identify as much of the current environment as possible. This will include talking to people who have expressed the business need, talking to stakeholders, looking at proposed/active concurrent projects, and remembering to reflect on not just what is presented, but what isn’t (more on that in an upcoming post). Often a project is initially presented as either a loosely defined idea, or a shoot the works scenario wherein everyone is promised a pony. Then the PM should figure out the ideal, sustainable, middle ground within an organization’s current capacity, and manage the expectations sure to follow that recommendation.

Meeting User Needs via Improvements to the ArchivesSpace Public User Interface

Hello, everyone! This is Alison Clemens, archivist at Manuscripts & Archives, member of the Yale Archival Management Systems Committee, and team leader of the ArchivesSpace Public User Interface (PUI) Settings & Enhancements Workgroup. Our workgroup is charged with reviewing and documenting any default changes we might want to make to the public user interface, and collecting and maintaining a list of possible future interface changes and enhancements. I’m pleased to give you an overview of some of our workgroup’s initial planning as we prepare to implement the ArchivesSpace PUI here at Yale.

Before I dive into our workgroup’s goals and progress, I’d like to emphasize that lots of behind-the-scenes data cleanup and enhancement work has been and will be instrumental in making the project successful. For example, we did a big project to clean up our people, organization, and subject records in ArchivesSpace, and we literally exorcised some ghosts in the process (no, really — did you know that the Library of Congress Name Authority File includes spirits?). But our ongoing data work will be the subject of a future blog post.

This post will focus on our shared raison d’être: our users, and ensuring that we are providing the best possible services and platforms to meet their needs. I’ll note here that as we consider how to serve our users, we’re thinking about both external users (i.e., patrons) and internal users (i.e., library staff).
From Back-end to Front-end:
Implementing the ArchivesSpace PUI
At Harvard

Susan Pyzynski
Houghton Library, Harvard University
October 26, 2017
Archival Discovery in 2015

• About 40 separate repositories
• 6134 EAD finding aids in our OASIS archival discovery system
• Approximately 2 million components
• OASIS system built in the mid 1990s, both its infrastructure and user interface outdated
• No shared method of finding aid creation
• Unknown number of paper collection guides scattered throughout the Harvard Library system
• Some repositories used the Aeon circulation system, most did not
Improving Archival Discovery

• Improve OASIS or go with a new system?
  • OASIS built on Tamino XWL server that needed to be replaced
  • Decision made that we needed to replace OASIS completely

• What to do with the finding aids?
  • Libraries determined to move the data into ArchivesSpace to replace OASIS back-end function
  • Gain the ability to have our finding aids in a collection management system

• What to do about the front-end?
  • ArchivesSpace PUI
  • ArcLight
Just a Little Pre-Work to Implement a New PUI

- Sixteen month project (July 2015-November 2016) to migrate data into ArchivesSpace
- Multiple committees and outreach/communication efforts to keep all the repositories informed throughout the data migration project
- Simultaneously involved in the development of the new ArchivesSpace PUI
- User testing on finding material in our archives
- Did a feasibility study in Spring 2016 regarding expanding the use of Aeon at Harvard
- Project to implement Aeon at more Harvard archival repositories started in May 2017
ArchivesSpace Public User Interface Task Force

• Running July 2017 through March 2018
• Made up of members from various repositories plus the developer assigned to the project, meeting weekly
• Subgroups to do user testing and outreach/communication
• Biweekly Agile meetings of chairs of taskforce and select Library Services Technology staff
• Working to have a beta version up in January 2018 to get feedback and do user testing
• Have a production version up Spring 2018
• Integration of ArchivesSpace and Aeon
Challenges Ahead

• Same archival discovery system since mid-1990s
• Flat files vs database structure
• Forces more consistency among repositories
• Metadata issues; some resolvable, some not
• Integration with other Harvard systems: Aeon, Alma, proposed new Digital Collections platform
• Harvard branding: new Harvard Library web portal implementation beginning now
• Managing user expectations and staff expectations with an iterative project
• Working with and developing an open-source product
Thanks!

Susan Pyzynski

pyzynski@fas.harvard.edu

Questions welcome
Questions?

Thank you for joining us today!