



Implementing ArchivesSpace:

*Migrating, Updating, Cleaning, and Customizing
Online Finding Aids at Rollins College*

Rachel Walton

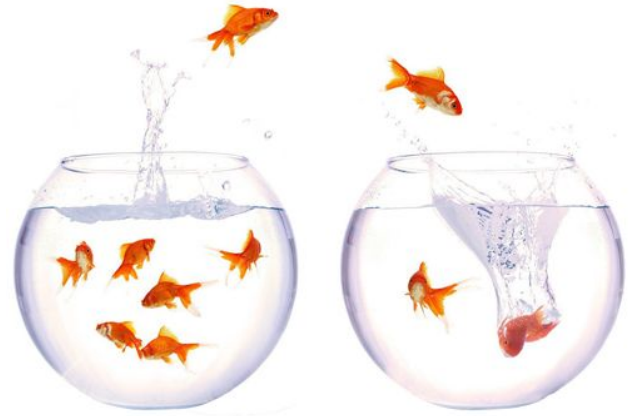
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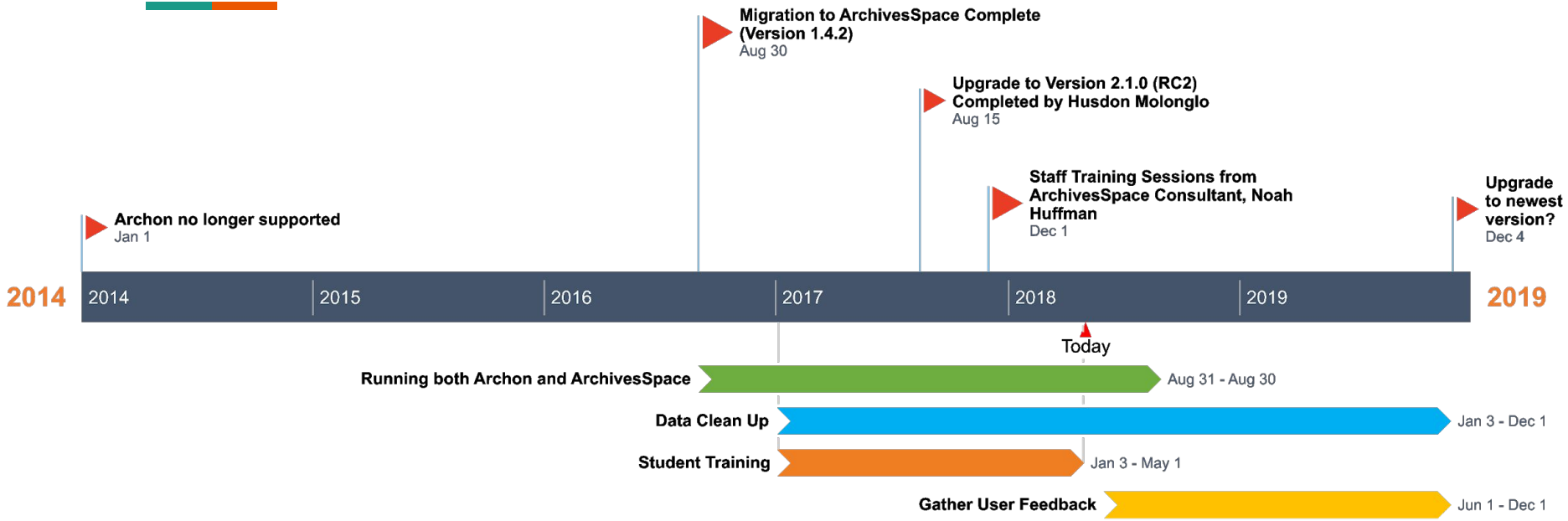
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Reasons we made the switch...

- Archon is unsupported as a tool as of January 2014
- Archon search tool was failing, search results sometimes unsuccessful
- Updated interface was needed, in terms of college branding
- Desire to improve overall usability and navigation
- Part of a larger strategic plan to support digital collections (Digital Objects)
- ArchivesSpace was the only viable option; very few alternatives on the market
- We were able to host it locally, which was a priority for us



Transition Timeline



Challenges: Technology

```
122 #
123 #AppConfig[:realtime_index_backlog_ms] = 60000
124 #
125 #AppConfig[:notifications_backlog_ms] = 60000
126 #AppConfig[:notifications_poll_frequency_ms] = 1000
127 #
128 #AppConfig[:max_usernames_per_source] = 50
129 #
130 #AppConfig[:demodb_snapshot_flag] = proc { File.join(AppConfig[:data_
131 #
132 #AppConfig[:locale] = :en
133 #
134 ## Report Configuration
135 ## :report_page_layout uses valid values for the CSS3 @page directiv
136 ## size property: http://www.w3.org/TR/css3-page/#page-size-prop
137 #AppConfig[:report_page_layout] = "letter landscape"
138 #AppConfig[:report_pdf_font_paths] = proc { ["#{AppConfig[:backend_ur
139 #AppConfig[:report_pdf_font_family] = "\"DejaVu Sans\", sans-serif"
140 #
141 ## Plug-ins to load. They will load in the order specified
142 AppConfig[:plugins] = ['rollins theme', 'local', 'lcnaf', 'aspace-pu
143 AppConfig[:pui_branding_img] = 'assets/rollins-college-w.png'
144 #
145 ## URL to direct the feedback link
146 ## You can remove this from the footer by making the value blank.
147 AppConfig[:feedback_url] = "archives@rollins.edu"
148 #
149 #
150 ##
151 ## The following are used by the aspace-public-formats plugin
152 ## https://github.com/archivesspace/aspace-public-formats
153 #AppConfig[:public_formats_resource_links] = []
154 #AppConfig[:public_formats_digital_object_links] = []
155 #AppConfig[:xsltproc_path] = nil
156 #AppConfig[:xslt_path] = nil
157 AppConfig[:pui_hide][:accessions] = true
```

```
97 publish: Publish?
98 publish_tooltip: |
99   <p>Determines whether this Digital Object or Component will be published to public
100 level: VRA Core Level
101 level_tooltip: |
102   <p>Primarily for use in multi-level VRA Core compliant records in order to indicate
103 digital_object_type: Type
104 digital_object_type_tooltip: |
105   <p>A generic term indicating the basic content type of the digital object. The default
106   element.</p>
107 language: Language
108 language_tooltip: <p>The language for the digital content.</p>
109 restrictions: Restrictions?
110 restrictions_tooltip: |
111   <p>A check box for indicating that restrictions apply. The restrictions can be expanded
112 file_versions_tooltip: |
113   <p>Links a digital object or digital object component to an associated content file
114   _singular: Digital Object
115   _plural: Digital Objects
116 digital_object_component:
117 <<: *digital_object_attributes
118 label: Label
119 label_tooltip: |
120   <p>A term used to describe the part and its position within the Digital Object being
121   Object than the top-level Digital Object record.</p>
122   <p>Examples:</p>
123   <ul>
124     <li>Audio: Tape 1, Track 1, Section 1, etc.</li>
125     <li>Image: Image 1, Picture 1, etc.</li>
```

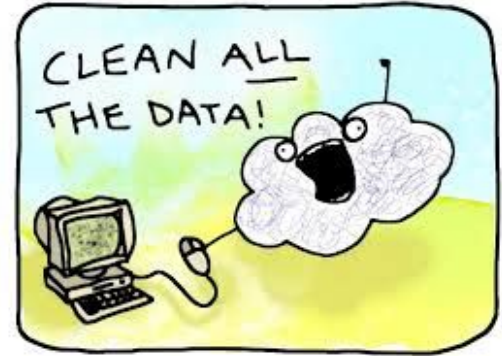
Challenges: Technology

Migration Woes:

- Data didn't transfer perfectly between Archon and ArchivesSpace.
- This is a locally hosted, open-source software, so we had to depend heavily on forums and listservs for technical info.
- System runs on Linux, requiring library admins to brush up on command line procedures.

Data Cleanup Projects:

- Before updating, data was sent to a contractor (Hudson Molonglo) to clean up records and metadata that didn't migrate correctly, and to match standards for ArchivesSpace. They also managed the update to 2.1.0.
- (This wouldn't have been necessary if we were a library who was starting our data entry from scratch.)



Challenges: Technology

Update Hurdles:

- We “hopscotched” across multiple versions, which required several updates in succession (1.1, 1.2, etc.) It is easier to start from the most recent edition and update infrequently and only as needed.
- Too many updates in rapid succession broke our database, requiring us to roll back versions.

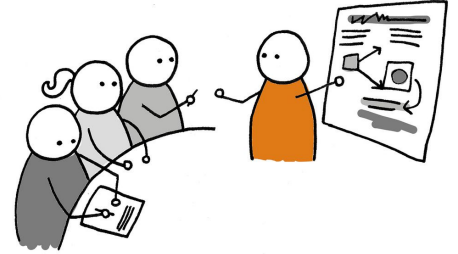
Aesthetic Tweaks:

- It is harder to customize the look and feel in older versions. For example, it is not clear how to tie in custom logos and style sheets.
- We had a vendor (Hudson Molonglo) help with our public user interface.
- Later versions are easier to customize, but requires knowledge of Cascading Style Sheets (CSS).





Challenges: Training



- Migrations are an experiment in **change management**. Consider the human impact of this change and support your team members by ushering them through the process.
- **Archives staff** need training in how to enter new records, edit existing records, and navigate search functions (which are quite different from Archon). We achieved this with a combination of self-guided training and a few training sessions with an outside consultant (Noah Huffman, Duke).
- New and changing personnel have made **retraining critical** as well.
- **Students and volunteers** needed basic training as the vocabulary and structures used in ArchivesSpace are mix of tech jargon and archival terminology. We designed a short “test” module for them.
- **IT and System Admins** may also need to be trained. Those with SQL database experience and Linux command line procedures will be best prepared to work on the back end of ArchivesSpace.



Challenges: Procedures and Planning



Adjusting Procedures (staff side):

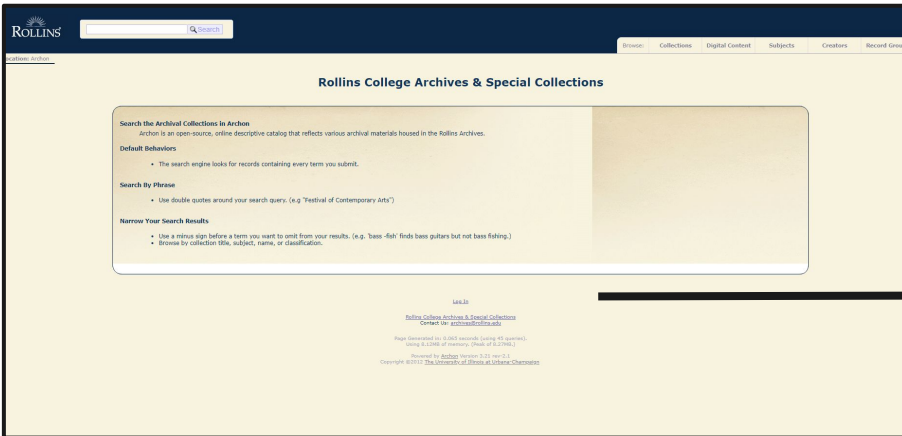
- Processing and description procedures had to be readjusted and standardized. We had to make decisions about how to work with new fields (e.g.: “Top Container”) and how to fit our organizational practices into the tool’s built-in hierarchical structures.
- The Library System Admin also had to adjust. We now schedule regular checks on the server, trimmed down our log files, and reboot as needed.

Preparing for Future Updates:

- Future plans for improving the system and our ability to use it may require updates. This will certainly involve: cleaning up old versions from server, purging old log files, making other small tweaks to keep everything running smoothly.
- Future updates will be informed by the documentation we’ve created thus far. They could also reveal new issues and challenges.



Outcomes



ROLLINS

Search

Home Collections Digital Content Subjects Creators Record Group

Rollins College Archives & Special Collections

Search the Archival Collections in Archon
Archon is an open-source, online descriptive catalog that reflects various archival materials housed in the Rollins Archives.

Default Behaviors

- The search engine looks for records containing every term you submit.

Search By Phrase

- Use double quotes around your search query. (e.g. "Festival of Contemporary Arts")

Narrow Your Search Results

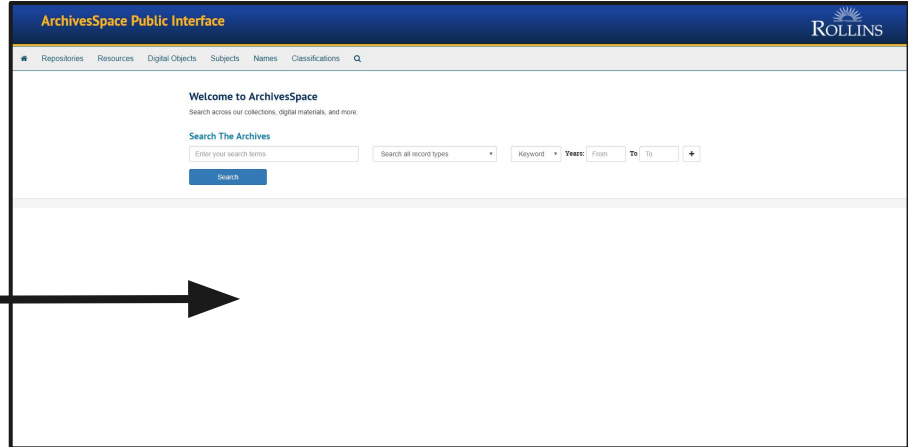
- Use a minus sign before a term you want to omit from your results. (e.g. "bass -fish" finds bass guitars but not bass fishing.)
- Browse by collection title, subject, name, or classification.

URL: rollins.edu/archives

Rollins College Archives & Special Collections
Contact Us: archives@rollins.edu

Page generated in 0.062 seconds (using 45 queries).
Using 8,000 of memory. (Peak at 0.084s)

Powered by Archon Version 3.21, rev 2.1
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ArchivesSpace Public Interface

ROLLINS

Repositories Resources Digital Objects Subjects Names Classifications

Welcome to ArchivesSpace

Search across our collections, digital materials, and more.

Search The Archives

Enter your search terms

Search all record types

Keyword

Years: From To

Search



Lessons Learned

- Be aware of “**early adopter**” struggles
- Know the difference between **On-Premise** and **Hosted** [*Note: If hosting locally, it is essential to have a good working relationship with your IT staff!*]
- Seek outside help and training early on to **prepare your people**
- Have a flexible and **long-term** timeline
- Think about running **parallel systems**
- Make sure you **get to know your collections** and finding aids, so you can anticipate where problems might pop up
- Plan for future and **ongoing data-clean-up** projects
- Think about your **customization** and branding needs
- **Document your process**, to prepare for future upgrades and/or staff changes



Ongoing Projects

- Homepage **customization**
- Adding help info or **wayfinding** information
- Improve the **stability** of the system (Upgrade?)
- Improve **metadata** for existing and new collections (e.g.: location metadata)
- Better **discoverability** on the web (SEO)
- Add to the **Digital Object** module to connect finding aids with other online collections
- Conduct **usability testing** to hear from end users and review site analytics





Technical Resources

Code Academy (<https://www.codecademy.com/>) - Free online training in command line and CSS for admins. Yes, you can do it!

ArchivesSpace Github (<https://github.com/archivespace>) - Documentation and file downloads. Essential!

ArchivesSpace Wiki (<http://wiki.archivespace.org>) - comprehensive site with both organizational and technical documentation

ArchivesSpace Development Catalog (<http://development.archivespace.org>) - where you can find updates on reported or known issues

Google Listserv (<https://groups.google.com/forum/#!forum/archivespace>) - open to non-members and often has a lot of helpful technical information



Training Resources

ArchivesSpace User Manual (https://docs.archivesspace.org/help_proxy/login) - members only but includes everything from a glossary to step-by-step screencasts

Virginia Tech's ArchivesSpace Manual for Special Collections

(https://www2.archivists.org/sites/all/files/archivesspace_2017-04-13_virginia-tech_special-collections.pdf) - updated March/April 2017 and reflects usage of ArchivesSpace 1.5.x

Yale's ArchivesSpace Manual and Training Videos

(<https://guides.library.yale.edu/archivesspace/training>) - includes info on the new "Top Container Model" and its complexities

(<https://guides.library.yale.edu/archivesspace/ASpaceContainerManagement>)

NYU's ArchivesSpace Training Guide and Resources (<https://guides.nyu.edu/archivesspace/training>) - intended for student users, includes activities and evaluation



ArchivesSpace Resources

Member Listserv (archivesspace_users_group@lyralists.lyrasis.org) - they also routinely post to the SAA Collection Management Tool Section listserv

Website (<http://archivesspace.org>) and **Blog** (<http://archivesspace.org/using-archivesspace/blog>) -

Lyrasis Hosting Info (<https://www.lyrasis.org/technology/Pages/ArchivesSpace-Hosting.aspx>) - for information specifically on pricing contact Madeline Sheldon (madeline.sheldon@lyrasis.org)

Christine DiBella (christine.dibella@lyrasis.org) - ArchivesSpace Program Director and expert on all things ArchivesSpace, an amazing resource!

Christine Kim (christine.kim@lyrasis.org) - ArchivesSpace Community Engagement Organizer, lead author of listserv and blog content, organizes open member calls as well as webinars



Human Resources

In addition to the above resources we also benefited from the help of the following consultants for technical work and individual trainings, respectively:

James Bullen (founder of and lead developer at [Hudson Molonglo](#), the creator of ArchivesSpace) - James and his team helped us update to Version 2.1.0, tackle a major data clean up problem, and begin customizing our interface.

Noah Huffman ([Digital Archivist](#) at Duke University and experienced ArchivesSpace instructor) - Noah led us in an individualized 2-day training focused on learning the ins-and-outs of the staff interface, and also helped us sort through a container management issue.