



**ArchivesSpace**

a community served by ✦ LYRASIS

# ArchivesSpace PUI Overview and Implementation Strategies

October 26, 2017 – Webinar



**ArchivesSpace**

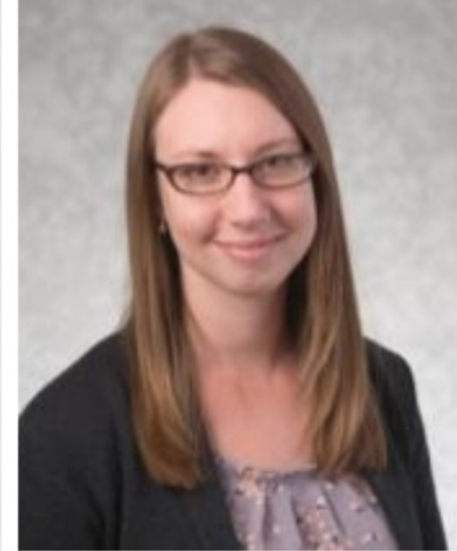
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# Presenters



**Mark Custer**  
Yale University



**Annie Benefiel**  
Grand Valley State  
University



**Susan Pyzynski**  
Harvard University



**Leigh Rupinski**  
Grand Valley State  
University



# Introduction to the ArchivesSpace PUI

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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? ▾](#)

### ARCHIVES & SPECIAL COLLECTIONS

University Libraries

Ekstrom Library Lower Level

### PHONE

tel (502) 852-6752

fax (502) 852-6673

### OTHER CONTACTS

[archives@louisville.edu](mailto:archives@louisville.edu)

[Personnel directory](#)

### LINKS

[Site Index](#)

[SharePoint](#)

### SOCIAL MEDIA

[Facebook](#)

[HistoryPin](#)

# 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

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# Enhanced Search Results

ArchivesSpace 1.5

Showing 1 - 4 of 4 Results

 [Chesterton, G. K.](#)

 [Chesterton, G. K., 1930-1936, undated](#)

 [Chesterton, G. K. \(Mrs.\), 1936 Jun](#)

 [Collins \(Seward\) Papers](#)

< 1 >

ArchivesSpace 2.1

Showing Results: 1 - 4 of 4

Relevance


## [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](#)


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## [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](#)

Search all record types where

keyword(s): **chesterton** Years: 1900 to 1950

New Search

Refine Search

## Showing Results: 1 - 4 of 4

Relevance

Sort

### Filter Results

Search within results

Search

#### Additional filters:

##### Type

Archival Record 3

Collection 1

##### Subject

Agrarianism. 1

Authors, American. 1

Distributism. 1

Fascism. 1

Humanism. 1

[v more](#)

##### Names

Adams, Franklin P. (Franklin Pierce), 1881-1960. 1

Agar, Herbert, 1897-1980. 1

Babbitt, Irving, 1865-1933. 1

Belloc, Hilaire, 1870-1953. 1

Benchley, Robert, 1889-1945. 1

[v more](#)


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

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# Updated Landing Pages, with Archival Inheritance

## ArchivesSpace 1.5

[Yale Test Site](#) / [Collins \(Seward\) Papers](#) / [Correspondence, 1920-1952](#) / [Chesterton, G. K. \(Mrs.\), 1936 Jun](#)

### Chesterton, G. K. (Mrs.)

Summary	>
Dates	1 >
Names	1 >
Instances	1 >
Components	>

#### 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	39002091430661
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

Yale Test Site / Collins (Seward) Papers / Correspondence, 1920-1952 / Chesterton, G. K. (Mrs.), 1936 Jun

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Summary	>
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- Summary >
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#### Summary

Level of Description File

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1936 Jun (Creation)

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[Chesterton, Frances, 1869-1938](#)

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<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

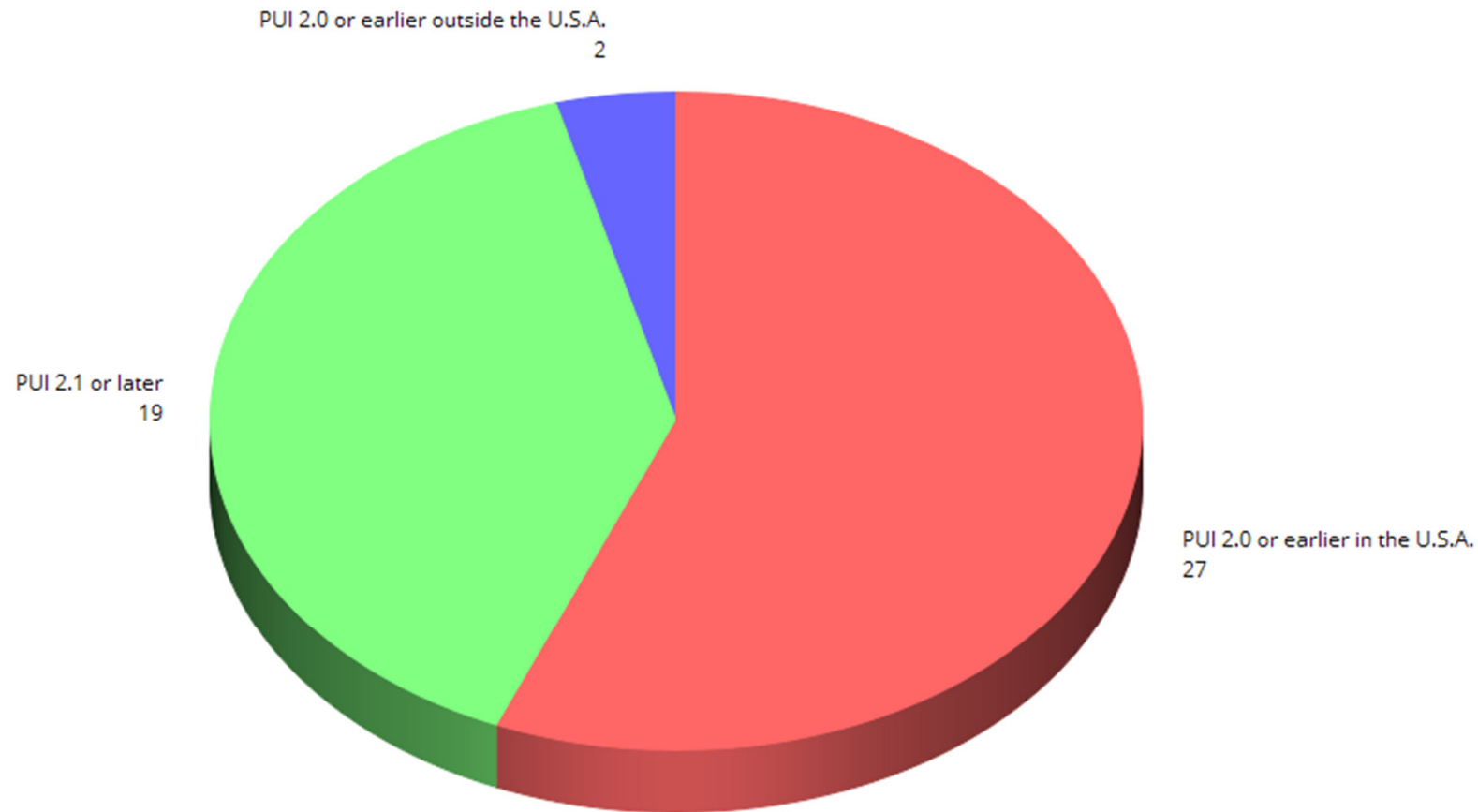
Bug fix for customizing the Public URI (thanks to Thomas Adams for reporting this)

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  $\geq$  ASpace 2.1

18 hosted sites

16 new sites (since 2016-05)

9 sites in beta

1 site also connected to Aeon

# ArchivesSpace Public Interface | Archives...



City of Boston Archives

The City of Boston Archives preserves and makes accessible the permanent and historical records of Boston city government. Our holdings include City Council records, Mayoral records, meeting minutes, correspondence, reports, tax records, photographs and much more. Our catalog contains detailed descriptive information about the collections held in the City Archives. Links to online digital access are included when available. For specific questions about our holdings, please contact us.

Search the City's archival holdings for detailed information contained in finding aids and collection descriptions. To browse the catalog, use the options in the navigation bar above.

Enter your search terms  Search all record types  Keyword  Years From  To

City of Boston Archives  
201 Rivermap Street  
West Roxbury, MA 02132  
arch@boston.gov  
(617) 630-1196

Staff Interface | ArchivesSpace.org | Hosted by LYRASIS

# ArchivesSpace Public Interface | Archives...

## CORNING MUSEUM OF GLASS

Repositories Collections Digital Objects Subjects Names

Special Collections & Archives

Your handy archives management tool

Enter your search terms  Search all record types  Keyword  Years From  To

Staff Interface | ArchivesSpace.org | Hosted by LYRASIS

# CUHK Library Archival Collections | Home



CUHK Library Archival Collections

Special Collections collects, preserves, arranges, and describes archival materials in a variety of formats on different subjects to support the University in its research, learning and teaching. Finding aids for archival collections to facilitate access and use of these primary resources can be discovered in the following search box.

Find what you're looking for:

Enter your search terms

Show Advanced Search

For a list of available archival collections, please click on the above main toolbar "Collections"

Search Tips:

1. Browse and select type of record you want to find on the above main toolbar (e.g. Collections, Subjects, Names)
2. This archival software looks for records containing every word you submit
3. Use quotation marks for a phrase search (e.g. "annual report", "1989")

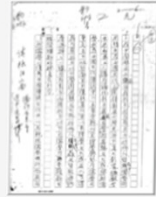
Access to Archival Collections:

Materials of the Collections must be used in the Special Collections Reading Room. The user is required to complete and submit the Special Collections Request Form at least three working days in advance. Rules and conditions govern the use of archival collections are to help preserve the Library's unique resources while providing an inviting research and study environment for library users.

Service hours:

Monday - Friday 9:00 a.m. - 5:30 p.m.

Tel: (852) 3943-4740



# ArchivesSpace Public Interface | Archives...



Special Collections & University Archives

Find what you're looking for:

Enter your search terms  Search all record types  Keyword  Years From  To

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# ArchivesSpace Public Interface | Archives...



Special Collections & Archives

Your handy archives management tool

On this site, you can search inventories of Middlebury College's archival collections. These unique, historical items range from hand-written letters by Henry David Thoreau and Collier Wierwille, to the papers of Middlebury presidents, College financial records, meeting minutes, reports, memorabilia, diaries, photographs, scrapbooks, sound recordings, films, and digital files. Contact us at [specialcollections@middlebury.edu](mailto:specialcollections@middlebury.edu) to learn more or to schedule a research visit.

Find what you're looking for:

Enter your search terms  Search all record types  Keyword  Years From  To

Staff Interface | ArchivesSpace.org | Hosted by LYRASIS

# ArchivesSpace Public Interface | Archives...



Travis County Archives

Your handy archives management tool

The collections of the Travis County Archives document the functions and activities of the Travis County government. Materials include county records, manuscripts, audio and visual materials, maps and books, artwork, artifacts, and office files. On this site, you can search the finding aids for Travis County's archival collections. Please contact us at for additional information or any questions regarding the collections.

Find what you're looking for:

Enter your search terms  Search all record types  Keyword  Years From  To

Staff Interface | ArchivesSpace.org | Hosted by LYRASIS

# University of Edinburgh Archive and Manuscript Collections



University of Edinburgh Archive and Manuscript Collections

Enter your search terms


Show Advanced Search

Archives and manuscripts are the unique documentary sources which are essential for understanding a wide range of people, places, knowledge and learning. Our collections have a range of insights including Scottish culture, the research and business of the University of Edinburgh, and therapy, scientific and medical work from across the world.

This catalogue covers both Special Collections and Letham Health Services Archive (LHSA) within the Centre for Research Collections and contains over 30,000 individual catalogue records. We are currently adding new content as well as re-organising and ingesting content from other systems as this work will continue.

Not everything is as complete and as perfect as we would like but we have decided to make it available anyway to improve access to our collections while adding further content and improvement to existing content is ongoing.

Contact Us



Privacy & Cookies | Terms/Donor Policy | Licensing & Copyright | Accessibility | Centre for Research Collections (LHSA) | Contact Us

ArchivesSpace Version: 20170209-1216a

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# ArchivesSpace Public Interface | Special...



University of Tennessee at Chattanooga Finding Aids

Search or browse our finding aids for manuscript and archival materials housed in the University of Tennessee at Chattanooga's Special Collections. Finding aids are detailed inventories of collections which provide information about the creation, historical context, and contents of primary source materials. They are used to determine which manuscript and archival collections are useful for your research.

To access collections, visit Special Collections. Appointments are encouraged.

For help conducting research with finding aids or primary sources, Ask an Archivist.

Find what you're looking for:

Enter your search terms  Search all record types  Keyword  Years From  To

# VMI Archives Catalog | Home



VMI ARCHIVES HOME  
VMI DIGITAL COLLECTIONS

Welcome to the VMI Archives Catalog

Enter your search terms

Show Advanced Search

About the Catalog

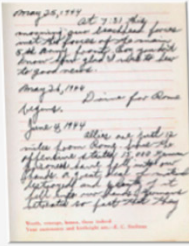
The VMI Archives Catalog contains detailed descriptive information about manuscripts (letters, diaries, and other personal papers), historical institutional records, and other primary source research collections. Links to online digital access are included when available. For specific questions about our holdings, please contact us.

Other Important Online Tools

The catalog is only one of three important online tools. Many other resources and research topics are accessed through the main VMI Archives website and our Digital Collections sites.

Looking for Images?

Go directly to our digital photographs collection to browse or search thousands of photos, prints, and



# ArchivesSpace Public Interface | Home



Washington and Lee University  
Special Collections and Archives  
Finding Aids

Enter your search terms

Show Advanced Search

The W&L Special Collections and Archives Finding Aids contain descriptive information about our manuscript and photographic collections and institutional records. Links to online access are included when available.

The materials from Washington and Lee University Special Collections and Archives are made available for use in research, teaching, and private study, pursuant to U.S. Copyright law. The user assumes full responsibility for any use of the materials, including but not limited to, infringement of copyright and publication rights of reproduced materials. Any materials used should be fully credited with the source. Permission for publication of this material, in part or in full, must be secured with the Head of Special Collections.

Some collections may contain materials with sensitive or confidential information that is protected under federal or state law. The user assumes full responsibility for using such information and is advised that the disclosure of such information about identifiable living individuals without their consent may have legal ramifications.

If you have specific questions about our materials, please contact Special Collections and Archives at 540-455-8663.

# ArchivesSpace Public Interface | Archives...



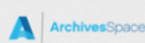
Welcome to ArchivesSpace

Search across our collections, digital materials, and more.

Search The Archives

Enter your search terms  Search all record types  Keyword  Years From  To

# ArchivesSpace Public Interface | Home



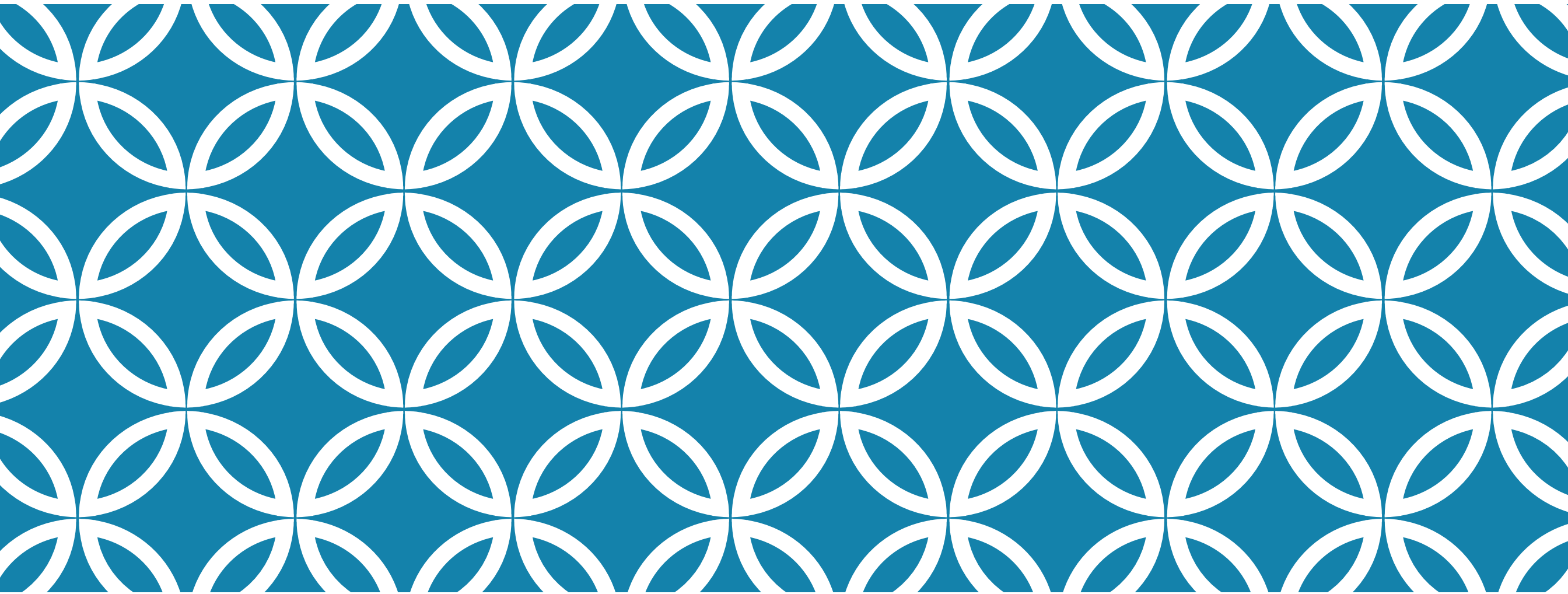
Welcome to ArchivesSpace.

Find what you're looking for:

Enter your search terms

Show Advanced Search

VMI ArchivesSpace.org | v1.5.1



**ARCHIVESPACE  
AT GRAND VALLEY STATE UNIVERSITY**





# 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

20<sup>th</sup> Century wars and veterans

Michigan authors and artists

General regional history

Abraham Lincoln, Civil War & Slavery



20th Century Wars & Veterans



Politics & Government



Michigan & Regional History



Young Lords in Lincoln Park



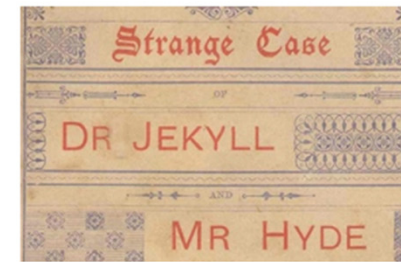
Interviews & Oral Histories



Art & Artists



Authors & Literature



Incunabula, Books & Printing



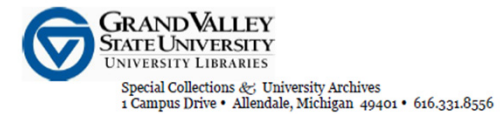
# OUR HISTORY WITH ARCHIVESPACE

## 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 Lyris
- Lyris-hosted, single repository instance
- Data still needed cleaning up for sharing resources in PUI



Collection title: Arnold Ott papers  
Creator: Ott, Arnold, 1940-2008  
Volume: 5 linear feet (4 cartons and 1 folder)  
Collection number: RHC-31  
Inclusive dates: 1940-2008

Source of Acquisition: Acquired from the children of Arnold Ott in 2008.

Copyright Status: For information on copyright or permissions for this collection, contact Grand Valley State University Special Collections.

Preferred Citation: Arnold Ott papers (RHC-31). Special Collections & University Archives, Grand Valley State University Libraries.

Access: Collection is open for research use.

Abstract: The Arnold Ott collection documents the life and work of Michigan-born chemist and entrepreneur Arnold Ott from 1940-2008. He worked at Dow Chemical Company and the Upjohn Company where he authored 55 domestic and foreign patents before starting the Ott Chemical Company in Muskegon. He continued on working as an entrepreneur and civic leader throughout his career. He served on the first Board of Control of Grand Valley State College and was instrumental in its founding. Ott was the longest standing member of the Grand Valley State University Board of Control, beginning as a charter member in 1960 and serving for 28 years, including two terms as board chair.

### Biographical note: Chronology

1917	Born in 1918 in Clare, Michigan
1939	Received Bachelor's Degree from Central Michigan University
1943	Received PhD from Michigan State University
1944	Senior Research Chemist for Dow Chemical Company, Midland, Mich.
1945	Chemical/Biological researcher at Upjohn Company, Kalamazoo, Mich.
1956	Founder/Chairman/President/Director of Ott Chemical Co., Muskegon, Mich.
1965	Received Honorary Doctor of Science Degree from Central Michigan University
1969	Chairman of Cascade Data, Inc., Grand Rapids, Michigan

# 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

The screenshot displays the 'Arnold Ott papers' collection page on the Grand Valley State University Special Collections and University Archives website. The page features a blue header with the university logo and navigation links for Collections, Digital Objects, Subjects, Names, and a search icon. Below the header, the collection title 'Arnold Ott papers' is prominently displayed, along with a red box icon indicating 'Collection - Box: 1-20' and the identifier 'RHC-31'. Action buttons for Citation, Print, and Staff Only are visible. The main content area includes tabs for Collection Overview, Collection Organization, and Container Inventory. A detailed description of the collection is provided, mentioning the life and work of Michigan-born chemist and entrepreneur Arnold Ott from 1917-2008. The page also lists key metadata fields: Dates (1917-2008), Creator (Ott, Arnold, 1918-2008 (Person)), Restrictions on Access (Collection is open for research use), Publication Rights (For information on copyright or permissions for this collection, contact Grand Valley State University Special Collections), and Extent (12 Linear Feet (15 boxes, 3 scrapbooks, 1 oversize folder, 1 roll)). A 'Collapse All' button is located below the metadata. On the right side, there is a search bar and a 'Collection organization' section listing six series: Series 1: Personal papers, Series 2: Writings and speeches, Series 3: Grand Valley State College, Series 4: Business Records, Series 5: Photographs and Scrapbook, and Series 6: Stereoscope Collection. A note indicates that Series 6 includes oversized photographs, certificates, and other items.

# BENEFITS OF USING ARCHIVESPACE

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

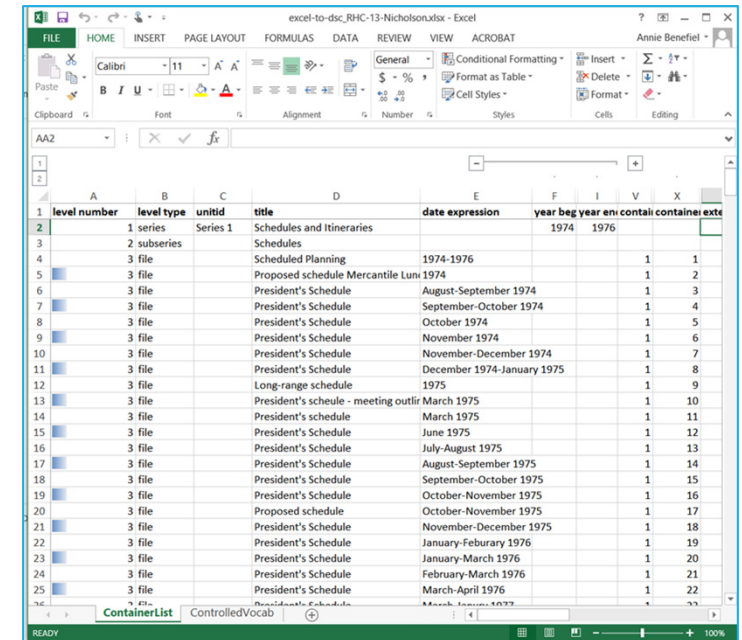
One-click publishing of completed finding aids

Finding aids have stable URLs

- I can share or link to from other resources, such as our Digital Collections

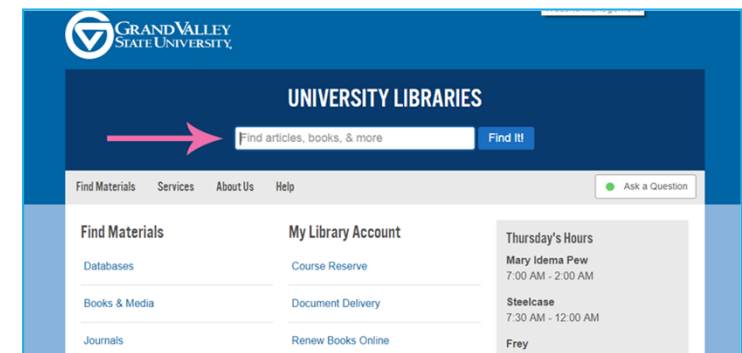
OAI-PMH Responder

- Soon all of our resource records will be included in our library's primary discovery layer (ProQuest's Summon)



The screenshot shows an Excel spreadsheet with the following columns: level number, level type, unitid, title, date expression, year beg, year en, contain, and extent. The data includes various schedules and itineraries for the years 1974-1976.

level number	level type	unitid	title	date expression	year beg	year en	contain	extent
1	1 series	Series 1	Schedules and Itineraries		1974	1976		
2	2 subseries		Schedules					
3	3 file		Scheduled Planning	1974-1976			1	1
4	3 file		Proposed schedule Mercantile Lun	1974			1	2
5	3 file		President's Schedule	August-September 1974			1	3
6	3 file		President's Schedule	September-October 1974			1	4
7	3 file		President's Schedule	October 1974			1	5
8	3 file		President's Schedule	November 1974			1	6
9	3 file		President's Schedule	November-December 1974			1	7
10	3 file		President's Schedule	December 1974-January 1975			1	8
11	3 file		Long-range schedule	1975			1	9
12	3 file		President's scheule - meeting outlir	March 1975			1	10
13	3 file		President's schedule	March 1975			1	11
14	3 file		President's Schedule	June 1975			1	12
15	3 file		President's Schedule	July-August 1975			1	13
16	3 file		President's Schedule	August-September 1975			1	14
17	3 file		President's Schedule	September-October 1975			1	15
18	3 file		President's Schedule	October-November 1975			1	16
19	3 file		Proposed schedule	October-November 1975			1	17
20	3 file		President's Schedule	November-December 1975			1	18
21	3 file		President's Schedule	January-February 1976			1	19
22	3 file		President's Schedule	January-March 1976			1	20
23	3 file		President's Schedule	February-March 1976			1	21
24	3 file		President's Schedule	March-April 1976			1	22
25	3 file		President's Schedule	March-April 1976			1	23



# 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.

The screenshot shows a web-based staff interface for editing a 'Multipart Note'. The interface is organized into several sections:

- Multipart Note:** This section contains fields for 'Persistent ID' (c6b736c512da9ea807eb17c293eb885c), 'Label' (Biographical Note), and 'Type' (Biographical / Historical). There is a 'Publish?' checkbox which is checked.
- Sub Notes:** A section with an 'Add Sub Note' button.
- Text:** A sub-note editor with a 'Content' field. The content includes the text: 'later on 7 June 1860. Ransom's Civil War service was entirely with the U.S. Army Quartermaster Corps, serving in Virginia, South Carolina, Texas, and other locales. After the Civil War his duties included various quartermaster assignments in Texas, Florida, and Tennessee. In December 1869 he married Sarah A. Read Childs (1824-1911), a'. Below the content is a 'Publish?' checkbox which is checked.
- Scope and Contents:** A section at the bottom with an 'Expand' button.

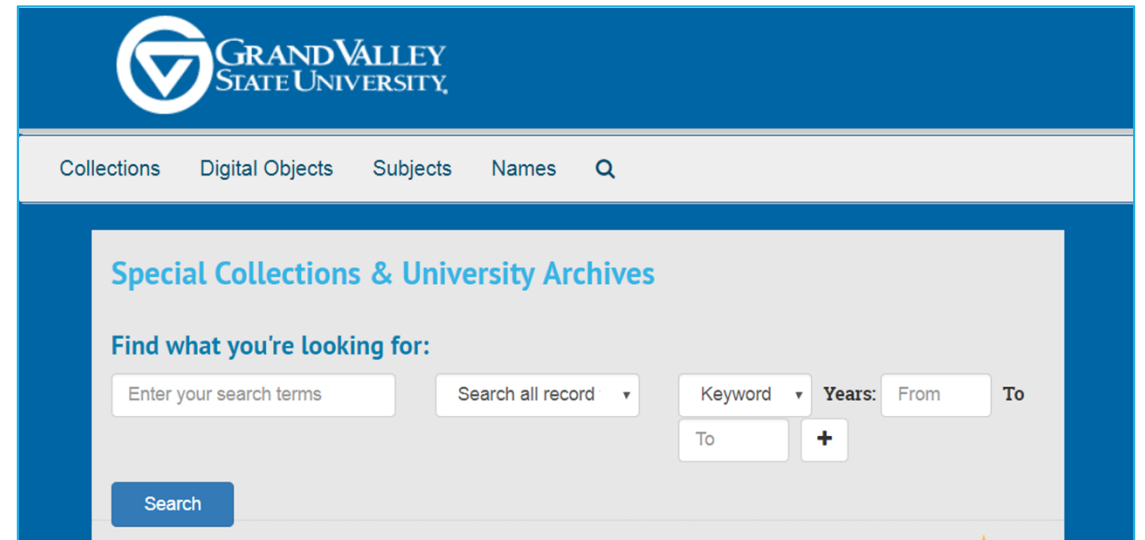
Each section has a 'Collapse' or 'Expand' button with a close icon (X) in the top right corner.

# 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



Positives	Negatives
Prominent citation button is handy	Site is confusing to navigate
Ability to refine searches	Keyword search results are confusing
"Once you find a relevant collection, it has lots of great stuff"	Unclear how to access relevant materials

# 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

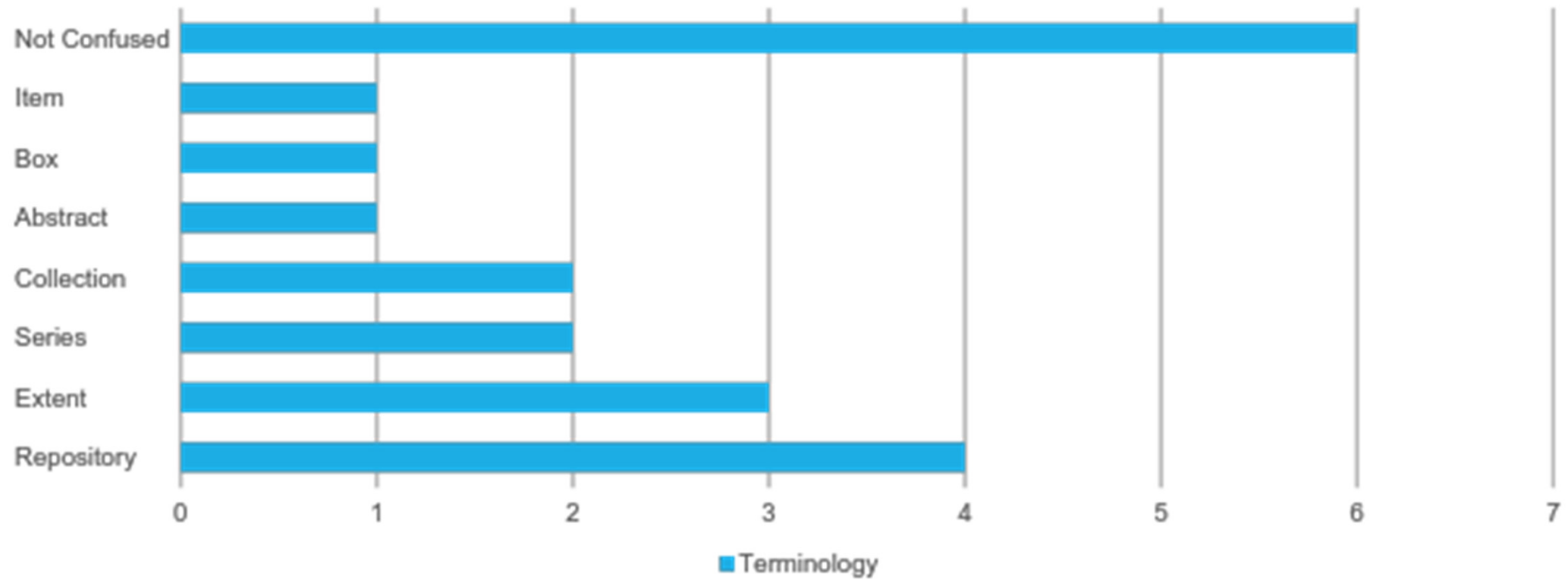
## Previous Experience

- 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



[Collections](#) [Digital Objects](#) [Subjects](#) [Names](#) [Q](#)

## Special Collections & University Archives

Find what you're looking for:

**Years:**  **To**

[Staff Interface](#) | [ArchivesSpace.org](#) | Hosted by LYRASIS



# PAIN POINTS

- How to understand search results

## ArchivesSpace Search Results

Search all record types in Grand Valley State University Special Collections and University Archives where  
keyword(s): **Wolf AND Jim Harrison**

Showing Results: 1 - 29 of 29

Relevance

**Columbia—Wolf: press packets, photographs, publicity materials, The Making of Wolf videorecording, 1994**  
 **Box: 4**  
**Scope and Contents** Correspondence files document Harrison's development as a writer, sportsman, gourmand, environmentalist, friend, and family man, and consist of correspondence to Harrison. Responses from Harrison may be interfiled with correspondence or found in the Outgoing correspondence files. Material ranges from routine fan mail and requests to long-time correspondence with friends and fellow writers, publishers, and producers. Outgoing correspondence files consist of handwritten drafts of correspondence ...  
**Found in:** Grand Valley State University Special Collections and University Archives / Jim Harrison papers / Correspondence / Producers

**"Jim Harrison Entre Chien et Loup [Between Dog and Wolf]: un film de Georges Luneau et Brice Matthieussent. Conversation shot in Michigan's Upper Peninsula and Leelanau Peninsula, in English. With Dan Gerber and Russell Chatham. [videotapes] (3)**  
 **Box: 11**  
**Scope and Contents** Writings about Jim Harrison document the public experience and opinion of the writer and his work. The materials include published and unpublished interviews, articles and published reviews of his writing and reviews of films based on his writing. Interview files may also contain correspondence, questionnaires, and audio and videotaped interviews.  
**Found in:** Grand Valley State University Special Collections and University Archives / Jim Harrison papers / Writings about Jim Harrison / Interviews and articles. / Audio/video

**Filter Results**

Search within results  
From -- To

**Additional filters:**

**Type**  
Archival Record 27  
Record Group 1  
Collection 1

**Subject**  
American poetry -- 20th century 1  
Authors, American 1  
Michigan 1  
Nature in literature 1  
Publishers and publishing 1  
v more

**Names**  
Harrison, Jim 1

## Library Search Results

Keyword     
 Limit search to available items  
3 results found. sorted by date .

Save Selected

Keywords (1-3 of 3)

-  **Wolf : a false memoir**  
Harrison, Jim, 1937-New York : Dell, 1981, ©1971.  
**Lib Use Only** Seidman House - Michigan Novels [PS3558.A67 W6 1981](#)
- Wolf**  
Harrison, Jim, 1937-New York, Manor Books [1973, ©1971]  
**Lib Use Only** Seidman House - Michigan Novels [PS3558.A67 W6 1973](#)
-  **Wolf; a false memoir**  
Harrison, Jim, 1937-2016.New York, Simon and Schuster [1971]

# QUESTIONS RAISED

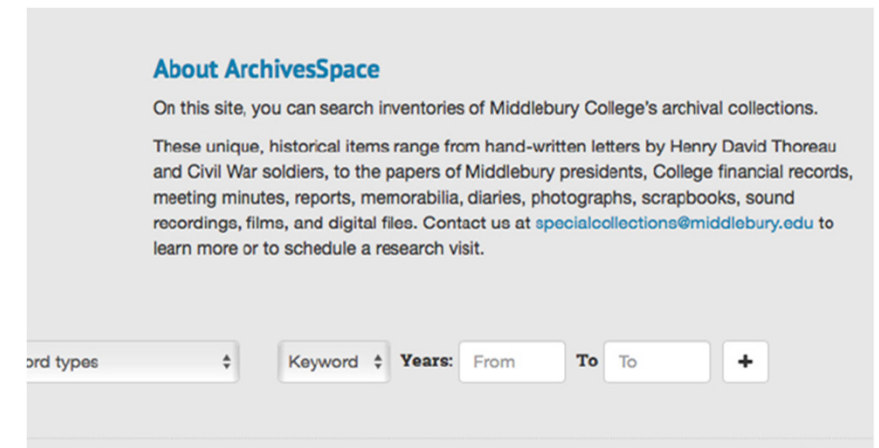
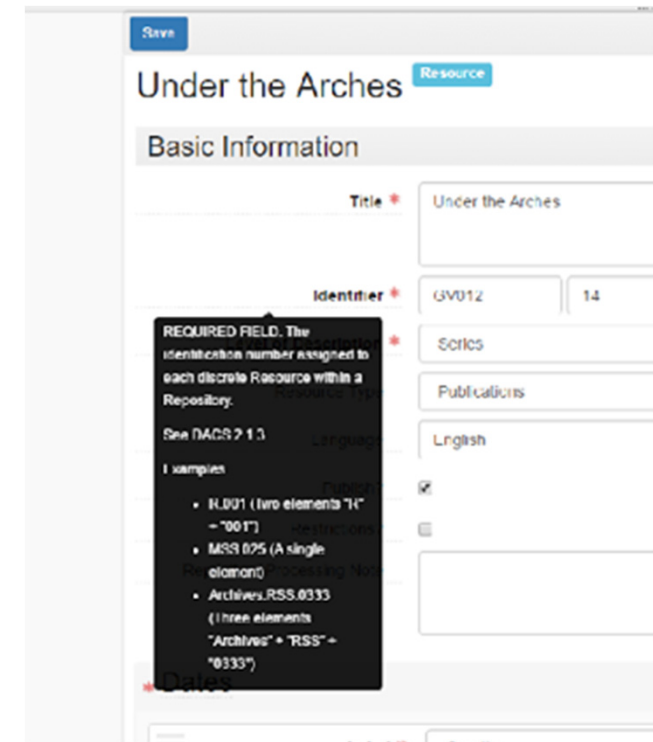
1. How do we help new users understand what kinds of resources live in Archives?
  2. How do we help remote users understand circulation restrictions on access?
  3. How do we increase student understanding of archival jargon?
- 
1. Where can we flex standards to accommodate our user population?

# 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 ARCHIVESPACE

Take advantage of instruction time

- ArchivesSpace built into my classroom introduction to finding resources here

Workshops

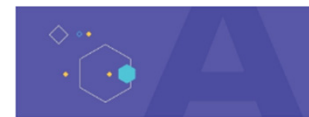
- Offer to both students and faculty
- Include other librarians

Subject Guide Tutorials

- Visual walkthroughs of how to use the system
- Glossary

“Learn the Terms” campaign for archival terms

Educate other librarians



## Abstract

A summary or brief description of the content of an article.



## Catalog

An online database listing with descriptions of the books, journals, films, and other materials held by a library.



## Database

A collection of information stored in an electronic format that can be searched by a computer.



## Journal

A publication, issued on a regular basis, which contains scholarly research published as articles, papers, research reports, or technical reports. Also known as a periodical.



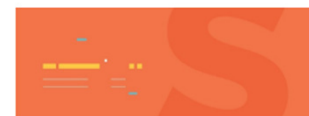
## Peer Review

A process by which editors have experts in a field review books or articles submitted for publication by the experts' peers. Peer review helps to ensure the quality of an information source.



## Scholarly

Information created by scholars who are experts in their field. It involves formal study or research.



## Subject Heading

A word that describes the subject of an article or book, used in many computer databases.

# 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

<b>Project name</b>	ArchivesSpace Public User Interface Implementation
<b>Project manager</b>	Melissa Wisner, Library IT
<b>Project sponsor</b>	E.C. Schroeder, BRBL, Chris Weideman, MSSA
<b>Project review date</b>	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
<b>Library goal(s)</b>	Library IT Stakeholders Goal-High-Collaborate with Special Collections to integrate the ArchivesSpace PUI with digital collections and provide functionality for requesting via Aeon.
<b>Effort reporting areas</b>	ArchivesSpace PUI Implementation

## 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. At 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

Role	Name	% Time	Responsibility
<b>Product Owner</b>	YAMS	15%	Documenting and communicating requirements and technical issues to Library IT, and helping manage regular product upgrades with the vendor.
<b>Central Support</b>	Library IT	15%	Responding to and coordinating resolution to technical issues, and helping manage regular product upgrades with the vendor.

# 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

# ☆ ArchivesSpace PUI Settings & Enhancements Work

Board Conversations Calendar Progress Files

Show Project Description

## Send to Lyrisis ASAP

+

Improve search results clarity



3 | v

Enable call number searches

v

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

1 | v

Determine options for building a "cart" feature for collections and searches



v



## Pending Workgroup Discussion

+

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

v

## Pending UX Testing

+

Build ways to use links from a record to find related item



1 | v

Add YFAD links to PUI

2 | v

Add search bar at top of search results page.

1 | v

Redo search result color coding

3 | v

Improve search drop-down menus

1 | v

Discuss adding a discovery page to the front page



2 | v

## Pending Project Team Discussion

+

Plan for connectivity with Orbis/location information

v

Improve look and feel of site

v

Add DL search button (see YFAD)

2 | v

Add mechanism for users providing feedback on specific records



2 | v

## Pending Development Work

+

Add a "show collections first" tickbox on the main search page or on the search results page

v

# Progress from Agents and Subjects Working group

Created Data Entry Best Practices

Went from 0 to 31,354 \*distinct\* URIs

```
<script type="application/ld+json">
{
  "@context": "http://schema.org/",
  "@type": "Person",
  "@id": "http://id.loc.gov/authorities/names/nr94005907",
  "name": "Beach, David Nelson, 1848-1926",
  "url": "http://puitestarchivesspace.library.yale.edu/agents/people/1977",
  "alternateName": [

  ],
  "description": "David Nelson Beach, 1848-1926, was a prominent Congregational clergyman in Cambridge, Massachusetts, Minneapolis, Minnesota and Denver, Colorado and was active in temperance reform. He was president of Bangor Theological Seminary from 1903-1921.",
  "knows": [

  ],
  "parent": [

  ],
  "children": [

  ],
  "affiliation": [

  ]
}
</script>
```

# Follow Our Progress

September 12, 2017

## 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.



<https://campuspress.yale.edu/yalearchivespace/>

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## 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 Pyszynski  
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!

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Questions welcome



# Questions?

Thank you for joining us today!



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