Developing training and documentation for ArchivesSpace for different types of staff

ArchivesSpace Member Meeting 2015

Documentation

- Technical documentation and program downloads on GitHub at:
    - https://github.com/archivesspace
- Original Functional Requirements, specifications, import/export maps:
    - http://www.archivesspace.org/technicaldocumentation
- ArchivesSpace members have access to documentation at:
    - http://docs.archivesspace.org./
- Documentation has been recently updated. Some sections now include pictures!

Before you develop any in-house training or documentation, you'll need to figure out how to use ArchivesSpace. For those who like to RTFM, there are several places you can go to find documentation on ArchivesSpace. The technical documents and program downloads are available on GitHub. The original specifications and import/export mapping information for ArchivesSpace can be found as a link on the ArchivesSpace public website. If you become a member of ArchivesSpace you will receive access to the online user manual. The manual was recently updated to reflect changes in the interface and some sections now include pictures

Additional Documentation

- The program itself includes tool tips when you hover or click on some fields.
  - Usually refers to the DACS area to refer to for more information
  - Customizable
- Help icon will open appropriate section in online user manual (members only)
- Trainee manual from Basics or Digital Objects workshops offered by ArchivesSpace/Lyrasis
- Archivist's Toolkit and Archon manuals

The program itself includes two built-in help features, the Tool Tip and the question mark icon.

Tool Tips appear when you hover over the label for the field. For the most part, these are brief descriptions of the expected content for the field with a reference to the applicable chapter in DACs for more information. For those who like messing with the program's guts, you can customize these tips with your own policies and examples if you want.

There are also help icons scattered throughout the interface which will open appropriate sections in the online user manual.

ArchivesSpace (the organization) also offers a Basics and Digital Objects workshop. If you attend one of their workshops you will get to keep your handy-dandy trainee manual.

And, especially if you aren't familiar with Archivist's Toolkit, I recommend skimming the Archivist's Toolkit and Archon manuals since ArchivesSpace replicates some of the key features from these programs.

Identify training/documentation needs for various levels of staff

- Current skill level of staff
  - Have staff used a web based program before?
  - Do they know what content to enter into an accession/resource/agent record?
- What do they know about ArchivesSpace?
  - Terminology, different record types, etc.
  - For Archivist's Toolkit users, should you have a session on the differences between the systems?
- Who needs to know what
  - What do public service staff need to know?
  - Will students be filling out accession records?

Any documentation or training you do will need to be tailored to the experience and skill level of your audience.   Do you just need to train them to use ArchivesSpace or do you also need to explain what an accession record is?

A good way to ensure that everyone is starting with the same information is to do a few general demos at department meetings while you're migrating to ArchivesSpace. You can introduce terminology, show off features that didn't exist in whatever you used before or point out major differences between what you had used and ArchivesSpace.
Though I can (and do) field test new and updated programs all day long, the people I work with assure me that 1.5 hours is all they can stand. Breaking sessions up into smaller sessions will not only ensure more of the trainees stay awake, you can develop sessions around a specific type of user or job responsibility. For example, if someone is only going to be creating accession records, then they don't need to go to the creating digital object records session.
Everyone is going to want to know how they're supposed to do *their* job in the new system. For some, this desire is so all-consuming that they really can't focus in a training session that just demonstrates everything that's possible in the program. For this reason, it's not always beneficial to send the entire department/library to a LYRASIS workshop on ArchivesSpace for example. Instead, treat the workshop as a "train the implementers" session. This group can then come back to the Library and develop in-house training and

documentation that details the workflows and policy decisions that you will need to make as part of your implementation.

Learning Styles

- Visual
  - Prefers using pictures, images, and seeing information
  - Tends to remember things that are written down
  - Learns better in lectures by watching them
- Auditory
  - Prefers using sound and music
  - Often prefers to be told how to do things and then summarizes the main points out loud to help with memorization
- Kinesthetic
  - Prefers the hands-on approach to learn new material

As you begin planning your training and documentation program, it's a good idea to review what you may have learned about learning styles. There are several different theories about learning styles, some say there are three styles, some say seven, there's even some that say there is no such thing as a learning style. In my experience, people seem to be a mixture of these three broad categories: Visual, Auditory and Kinesthetic. The dominant style of an individual is likely to change based on their familiarity with a topic. For example, I would want someone to show me how to crochet a pattern but I'd rather read a systems manual. The idea is to develop training and/or documentation that utilizes as many of the styles as possible.

In-house training & documentation

- Training sessions
  - Mixture of demonstration and hands on
  - Have handouts
  - Have floaters to assist with the hands-on part
  - One-on-one sessions as a follow-up for some
- Documentation
  - Easy for intuitive folks to ignore "duh" steps so document them for those who need them.
  - Include pictures, especially in student manuals
  - Tip: Write one master manual documenting everything then copy/paste sections into workflow specific manuals

For training sessions, a mixture of demonstration with time for hands-on practice along with a written manual will hit the bulk of learning styles. To keep the session moving it's good to have an assistant or two in the session to help with computer problems or to assist those who are lagging behind. Identify individuals who can answer questions for staff when they get back in the "real-world" and if you know you have folks that will need it, find someone to sit with individuals the first couple of times they try to create a record on their own.

For documentation, I usually create a huge master document that details every single step. This is mainly because the act of writing things down is how I commit stuff to memory. I can then copy/paste information from the master manual into separate manuals that focus on targeted workflows, staff level etc.
Once staff have mastered the mechanics of using the program, I provide cheatsheets so that those who catch on quickly don't have to keep paging through the larger manual.

The User Documentation Committee has been working to update the existing documentation on the Members Website. For example, we are currently in the process of creating a more comprehensive glossary. The handout and website have the terms and definitions we've come up with so far. If you have suggestions for additional terms please contact the chair of the committee, Linda Hocking.
We are also working to enhance the existing documentation with concrete examples of how users are implementing ArchivesSpace. If you are willing to share screenshots and specifics of how your repository is using a particular feature or field, please email them to Linda Hocking at lhocking@litchfieldhistoricalsociety.org. We reserve the right to edit examples for size, reading comprehension and to avoid duplication. We plan to share these examples on the public Wiki and in the member documentation. We look forward to contributions from the user community!
Please take a look at the documents on the member site. If there are things they would like to see in the documentation that aren't there, please let us know.

Questions for the group

- What are the different needs for various levels of staff?
- What formats/How do you share documentation with staff?
- In 2015 ArchivesSpace will have at least one release per quarter. How do you/will you keep up with documentation and training?
- Should I have a formal training session for just two employees or just sit them in front of a computer and have them figure it out?
- Combining written documentation for AS with other instructional media--e.g. Jing videos of specific AS procedures, etc.