It's in the Cards

Integrating **ArchivesSpace** and **Trello**
for Better Processing Project Management
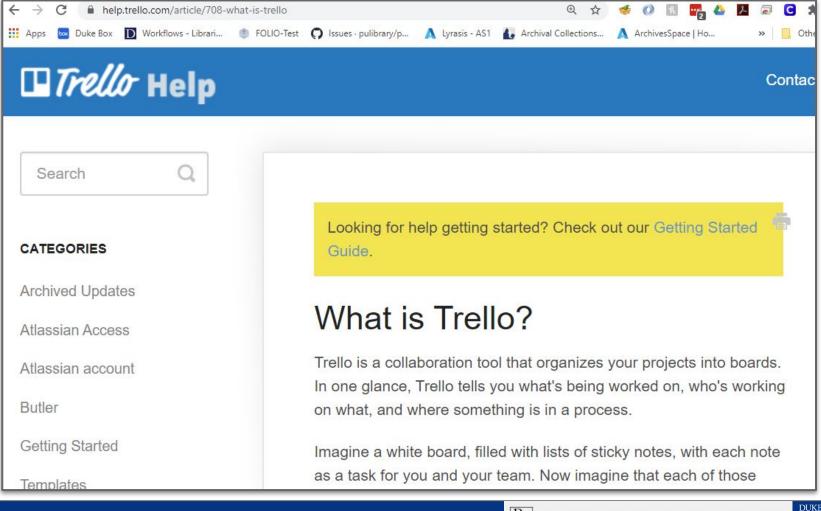
Github: https://github.com/noahgh221/archivesspace-trello

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Tracy Jackson, *Head of Manuscripts Processing*

ArchivesSpace Member Forum
August 3, 2020
2-2:20pm

Outline

1 Use case

2 Integration in action

3 Building the integration

4 How to set up / configure

🎴 *Trello* Help

Contac

Search 🔍

CATEGORIES

Archived Updates

Atlassian Access

Atlassian account

Butler

Getting Started

Templates

Looking for help getting started? Check out our Getting Started Guide.

What is Trello?

Trello is a collaboration tool that organizes your projects into boards. In one glance, Trello tells you what's being worked on, who's working on what, and where something is in a process.

Imagine a white board, filled with lists of sticky notes, with each note as a task for you and your team. Now imagine that each of those

trello.com/b/eVHzuwsQ/archival-processing

Apps ⬛ Duke Box D Workflows - Librari... FOLIO-Test Issues · pulibrary/p... Lyrasis - AS1 Archival Collections... ArchivesSpace | Ho... ArchivesSpaceSQL RLTS Help Desk RLTS Help Desk Form Other bookmarks

Trello

Boards

Archival Processing | Archival Processing Team | Team Visible | Invite | Calendar | Butter (4 Tips) | Show Menu

Anticipated (alphabetical)
- AllAfrica.com Records
- Bay Movement Veterans (SNCC)
- John Biewen (SNCC, works at CDS)
- Angus Deaton
- Disability Rights NC
- Ariel Dorfman addn (in Chile)
- Jim Dow photographs (slides installment)
- Ivan Hlasnik
- Hodges Family Photo collection (eta 2020)
- MFA thesis submissions
- James "Spider" Martin civil rights photographs
- Gary Monroe collection addn
- Douglas North addn
- Steven Petrow
- Martin Shubik
- West End Revitalization Records
- Oliver Williamson

New Accessions
- 2020 0058: H. Lee Waters Film collection addition
- 2020 0057: Albert Dauncey collection
- 2020 0056: Black Caucus March photographs
- UA2020 0068: Share Your Covid-19 Story collection
- UA2020 0057: Blue Ridge House records
- UA2020 0066: Duke Crux records
- UA2020 0055: Hoof 'n' Horn records
- UA2020 0063: Community Service Center records
- UA2020 0029: Perkins Library Preservation Officer records
- 2020 0049: Allan Gurganus papers addition
- 2020 0052: Norma Taylor Mitchell papers
- 2020 0025: Meinrad Craighead papers
- 2020 0011: Leah Fritz papers, 1940 2009 and undated
- 2020 0017: Consumer Reports Archives addition 2
- 2020 0011: Anne Firor Scott Papers,

Straight to LSC (alphabetical)
- The LeRoy T. Walker Africa News Service Archive addition (given by William Minter)
- Anthony Barnes Atkinson papers
- John Betancourt collection
- Carolina Justice Policy Center
- Fred Chappell papers addition
- UA2019 0092 Department of English records
- 2020 0008: Ariel Dorfman papers addition
- Front Page records
- 2019 0155 Stanley Hauerwas papers addition
- 2019 0164: Institute for Justice and Democracy in Haiti (IJDH) records
- Irvin family papers addition
- UA2019-0104 Library Newsletters, Acquisitions, and Accessions List
- Edwin and Terry Murray Collection of Board Games
- Edwin and Terry Murray Collection of Role-Playing Games addition
- UA2019-0099 Out of the Blue records
- Murray Pulp addition

Waiting for CD
- 2020 0054: Alliance for Audited Media microfilm collection
- Leah Wise (SNCC)
- Whitmaniana cleanup
- 2020 0009: Bay Area Movement Veterans collection
- 2020 0046: American Slavery documents collection addition
- 2020 0046: Bob Sheldon papers addition
- 2020 0025: Stephanie Strickland papers addition
- Eve Kosofsky Sedgwick papers

Newly arrived, in Smith Vault (not being processed yet)

Upcoming Prioritized Projects (Backlog or Other)
- Center for Justice and Accountability
- Courtland Cox ticket
- CR records
- JWT account files additions
- JWT Burt Manning papers
- George Lamming
- Montgomery Parker letters and cabinet card
- WCTU
- Women's Studies Program e-recs

New in Queue (alphabetical)
- UA2019 0106 9019 Pennant
- UA2019 0105 Allen Building Takeover Negatives
- UA2019 0102 Lemur Center records
- 2020 0011: Duke Association for Business Oriented Women records
- 2020 0024: Students of the Caribbean Association records
- 2020 0012: Duke Students with Interracial Legacies
- 2020 0026: Asian American Studies Working Group records
- 2020 0021: Native American Student Alliance records
- 2020 0020: Styron House records
- UA2020 0018: Duke Simple Charity records
- UA2020 0019: Ida Stephens Owens memorial slideshow
- 2019 0192: Bill of Fare for the Steam Ship Wisconsin
- 2020 0041: Sallie Bingham Papers
- 2020 0044: Maude Ballington Booth papers
- 2019 0185: Brazilian Cordel Literature collection

Inventories to Upload

Physical Processing (alphabetical)
- 2020 0035: Asian maps collection addition
- Sue Coon
- CR Iconographic collection
- Robert Edward Dawson Papers
- 2020 0001: Kenneth Hubbard collection of presidential campaign ephemera addition
- 2020 0029: Kenneth Hubbard collection of presidential campaign ephemera
- Lucy Randolph Mason Papers (RLTS ticket for rehousing)
- Murray Papers (new)
- Allan Gurganus papers erecs
- 2019 0175 Edwin and Terry Murray papers addition
- Marc Norlove
- OAAA Nancy Fletcher papers
- Judy Woodruff papers

Description (alphabetical)
- Americans for Immigrant Justice records
- Renee Chelian papers
- James Sears e-recs
- UA Chemistry Department records box list
- Bruce Davidson photographs
- Griff Davis negatives/reprocessing
- UA2019 0109: Duke Chapel recordings
- UA2019 0081: Richard Hays Records
- UA2019 0088: Pitchforks of Duke University recordings
- Harold Jantz papers survey

Electronic Records
- McGee Family
- James Sears e-recs
- E. Roy Weintraub papers addition
- Leslie Brown e-recs
- Rick Lang photographs (e-recs)
- UA2020 0022: All of the Above records
- UA Chronicle photograph collection
- UA2020 0027: Office of the University Secretary records
- 2017 0078 John Seelye e-recs
- 2014 0116 Beth El Synagogue e-recs
- Herbert Scarf papers (e-recs)
- Joint Center for Political and Economic Studies records (e-recs)
- Jimmy Creech papers (e-recs)

AV Work
- UA2019 0098 Stephen Miller DV
- 2020 0051: Palestinian Oral History Project collection
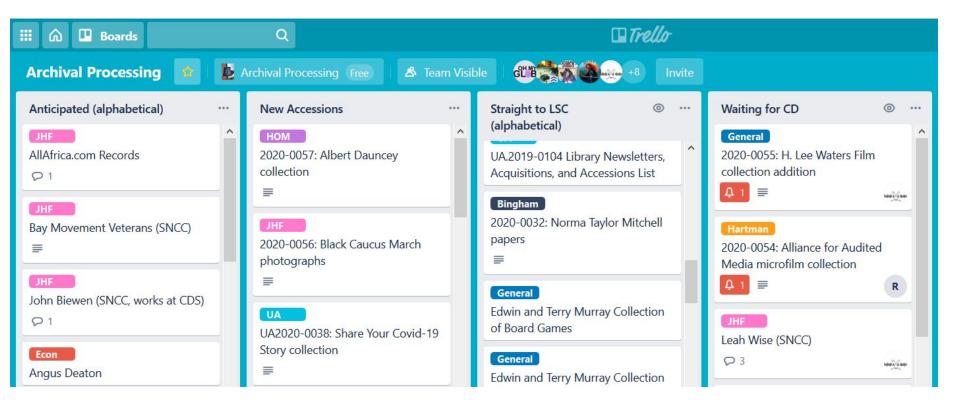- 2020 0055: H. Lee Waters Film collection addition

1 Use Case

Rubenstein Library Archival Processing

- **11 Technical Services staff**, including 4 Technical Services Archivists, 1 Visual Materials Archivist, 1 Manuscript Cataloger, 1 Digital Records Archivist, 1 Audiovisual Archivist, 1 Metadata Archivist, 1 Archival Processing Assistant, 1 Section Head
- **17+ Collectors**, including 7 curators, 1 University Archivist, 1 Records Manager, 2+ Research Services staff with collecting roles, 6+ International and Area Studies Librarians outside of Rubenstein
- In FY20, accessioned **4000+ lf** of material (outlier year); in FY19, accessioned 1300+ lf
- In 2019, recorded **316 accessions**; in 2018, 277 accessions

Lots of stuff coming from many directions handled by a bunch of people.

Archival Processing Trello Board

Original function of Trello board:

- Track processing work on larger/more complex projects
    - Who is working on the project
    - At what stage is the project
- All accessions came through one person, who created both the accession record in AS and the Trello card
- Small, quick, easy accessions might not get a Trello card (no need)
- Processors emailed Noah (or Tracy) to publish finding aids
- Not all processing work represented (separate sections)

Trello columns previously:

- Anticipated
- Straight to LSC
- Waiting for CD
- Newly arrived in Smith vault
- Upcoming Prioritized Projects (backlog or other)

- New in Queue (alphabetical)
- Physical Processing (alphabetical)
- Description (alphabetical)
- Erecs and AV work
- Conservation Queue
- Done in Quarter (current quarter)

Trello card previously:

Accession/collection title

Label indicating collection area

Ability to assign a member (processor)

Activity shows movement between columns

Usually little to no description

New needs for Trello board:

- Combined section with more staff
- Track processing work on all accessions/collections
    - Who is working on the project
    - At what stage is the project
- Accession records created by multiple people, accessions coming in through several streams
- Add review step, automate notification of readiness for review and publication
- Reduce duplication of effort, streamline process to reduce risk of missing something, make relevant information more visible

Trello columns now:

- Anticipated
- **New Accessions**
- Straight to LSC
- Waiting for CD
- Newly arrived in Smith vault
- Upcoming Prioritized Projects (backlog or other)
- New in Queue (alphabetical)
- Inventories to Upload

- Physical Processing (alphabetical)
- Description (alphabetical)
- Erecs
- AV work
- Conservation Queue
- **Ready for Review**
- **Ready for Publishing**
- Done in Quarter (current quarter)

Trello card now:

Same features as older version, plus:

Automatic inclusion of accession number

Copies information from selected fields in ArchivesSpace, including indication of existing inventory, related resource, notes for processor

2 Integration in Action

Save   Add Event ▾   Spawn ▾   Transfer ▾   More

Hoof 'n' Horn records   Accession

Basic Information

Title: Hoof 'n' Horn records

Identifier *: UA2020   0035

Accession Date: 2020-07-13   e.g. YYYY-MM-DD

Content Description: Meeting minutes; performance planning documentation, including show contracts; photos; videos; playbills; related to the sensory-fri...

Electronic Media Present? ☑

Special Media Formats: PDF, jpg, mbox, mov, mp4

New or Addition?: Addition

Arrival Date: 2020-07-08   e.g. YYYY-MM-DD

Research Center: University Archives

Primary Collector Name: Amy McDonald

Collection Management   Add Collection Management Fie

Desired Processing Level: 3-folder level processing

Rights determined? ☐

Notes for Processor: Note the materials related to the sensory-friendly production of The Wiz--this may be important to call out for researchers interested in

Processors

Related Resources

Resource *: ▦ Hoof 'n' Horn records

✕

▭ UA2020-0035: Hoof 'n' Horn records

in list New Accessions

LABELS

UA   +

☰ Description   Edit

Acq Type: gift
Accn Date: 2020-07-13
Extent: 0.5 megabytes

Provenance: Adam Beskind, Class of 2020, HnH president 2019-2020

Note for Processor: Note the materials related to the sensory-friendly production of The Wiz--this may be important to call out for researchers interested in disability/neurodiverse history.

Inventory:

Special Media Formats: PDF, jpg, mbox, mov, mp4

Related Resource(s): Hoof 'n' Horn records | /repositories/2/resources/1788

Description:

Meeting minutes; performance planning documentation, including show contracts; photos; videos; playbills; and emails to Phred listserv, 2017-2020. Note the materials related to the sensory-friendly production of The Wiz--this may be important to call out for researchers interested in disability/neurodiverse history.

SUGGESTED   ⚙

👤 Join

Feedback

ADD TO CARD

👤 Members

◇ Labels

☑ Checklist

🕐 Due Date

📎 Attachment

🖵 Cover

POWER-UPS

🏛 Butler Tips (4)

Get More Power-Ups

Get unlimited Power-Ups, plus much more.

File   Message   Tell me what you want to do...

Delete | Reply | Reply All | Forward | ... | Create a task wi... | EAD/Finding Ai... | To Manager | Move | Assign Policy | Mark Unread | Categorize | Follow Up | Translate | Zoom | Send to OneNote | Report Phish to Duke

Delete   Respond   Quick Steps   Move   Tags   Editing   Zoom   OneNote   PhishAlarm

Sat 7/25/2020 1:00 AM

Cron Daemon <root@vcm-6600.vm.duke.edu>

Cron <nh48@vcm-6600> python3 /home/nh48/aspace_trello_integration.py

To   Noah Huffman

We removed extra line breaks from this message.

Target Board: Archival Processing
Target List: New Accessions
Getting all Accessions created since: 2020-07-24T05:00:02.359472 David M. Rubenstein Rare Book & Manuscript Library Examining last 20 accessions created in ASpace...

2020-0050 not entered in last 24 hours
2020-0051 not entered in last 24 hours
UA2020-0027 not entered in last 24 hours
UA2020-0028 not entered in last 24 hours
UA2020-0029 not entered in last 24 hours
2020-0052 not entered in last 24 hours
UA2020-0030 not entered in last 24 hours
UA2020-0031 not entered in last 24 hours
UA2020-0032 not entered in last 24 hours
UA2020-0033 not entered in last 24 hours
UA2020-0034 not entered in last 24 hours
2020-0053 not entered in last 24 hours
UA2020-0035 not entered in last 24 hours
2020-0054 not entered in last 24 hours
UA2020-0036 not entered in last 24 hours
UA2020-0037 not entered in last 24 hours
2020-0055 not entered in last 24 hours

Creating New Trello Card for: UA2020-0038: Share Your Covid-19 Story collection | entered on: 2020-07-24T17:34:31Z | university_archives Creating New Trello Card for: 2020-0056: Black Caucus March photographs | entered on: 2020-07-24T20:00:10Z | franklin Creating New Trello Card for: 2020-0057: Albert Dauncey collection | entered on: 2020-07-24T20:27:44Z | hom All Done!

Archival Processing ☆ | 📋 Archival Processing Free | 👥 Team Visible

Anticipated (alphabetical) ⋯

JHF
AllAfrica.com Records
💬 1

JHF
Bay Movement Veterans (SNCC)

JHF
John Biewen (SNCC, works at CDS)
💬 1

Econ
Angus Deaton

Human Rights
Disability Rights NC
💬 3

General
Ariel Dorfman addn (in Chile)

ADA
Jim Dow photographs (slides installment)
💬 1

New Accessions ⋯

HOM
2020-0057: Albert Dauncey collection

JHF
2020-0056: Black Caucus March photographs

UA
UA2020-0038: Share Your Covid-19 Story collection

UA
UA2020-0037: Blue Ridge House records

UA
UA2020-0036: Duke Crux records

UA
UA2020-0035: Hoof 'n' Horn records

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John

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💬 1

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Fred

UA
UA20
recor
💬 1

Gen
2020-
addit

2020-0057: Albert Dauncey collection ✕
in list New Accessions

LABELS
HOM +

SUGGESTED ⚙
👤 Join
Feedback

ADD TO CARD
👤 Members
🏷 Labels
☑ Checklist
🕐 Due Date
📎 Attachment
🖥 Cover

Description Edit

Acq Type: purchase
Accn Date: 2020-07-24
Extent: 1 linear_feet
Provenance:

Note for Processor:
Inventory:
Special Media Formats:
Related Resource(s): NONE listed in ASpace
Description:

Dealer description:
An Archive of Documents and Letters Relating to Albert Dauncey; A "Criminal Lunatic". Bath, 1900-1905.
An archive dated 1900-1905 dealing with the case of Albert Dauncey, confined for criminal insanity at the Somerset and Bath Lunatic Asylum in Wells. Dauncey was convicted of an assault in 1899 whilst under the paranoid delusion that his local vicar was leading a
conspiracy against him. The collection includes letters, affidavits, and contributions from clergy, police, solicitors, members of the family etc. The various documents are listed chronologically where possible, except for the first letter, dated 1901 but dealing with the most pertinent earlier events in Daunsey's sad case: A report by Dr. Arthur Law Wade with annotations ("Will Dr. Wade kindly supply facts") and several corrections and details to the report in another hand, significant additions are initialed.
The archive or case history containing 50 items in all, including correspondence with the poor Albert Dauncey's brother, William, regarding Albert's quite sizeable properties and estate, payments and banking records providing for Albert's continued care,
correspondence from Mr. Shadwell of the lunacy commission detailing the correct procedure for Albert's 'sectioning' under the Lunacy Act, copies of Affidavits, a

POWER-UPS
🔹 Butler Tips (4)
Get More Power-Ups
Get unlimited Power-Ups, plus much more.
💳 Upgrade Team

ACTIONS
→ Move
📋 Copy
🗂 Make Template
👁 Watch
🗄 Archive

3 **Building the Integration**

Guiding Principles

- ASpace is system of record

- Trello data is ephemeral (That's OK)

- ASpace is good at data; not so good at workflow tracking

- Let each system do what it does best

- Both systems have APIs -- use them!

Components

- **Python Script**

  - Python 3 ([Anaconda Distribution](#))

  - [ArchivesSnake](#) Python library

  - [Py-trello](#) Python library

- **Linux** [Cron Job](#) (for scheduling, running script)

- **Linux Virtual Machine** ([Duke offers free VMs to all students/staff](#))

- **Trello Account** / [API Keys](#)

4 How to set up / configure

Github: https://github.com/noahgh221/archivesspace-trello

noahgh221 / archivesspace-trello

<> Code   ⓘ Issues   ⚙ Pull requests

master ▾   1 branch   0 tags

noahgh221 Update README.md

screenshots   Add files via
README.md   Update REAexamid
aspace_to_trello.py   initial comm

README.md

archivesspace-trello

aspace-to-trello.py creates Trello cards base
designed to be run as a scheduled cron job.
ArchivesSpace API to identify recently create
those accession records on a specified Trello

Script is written in Python 3 and uses Archive

Getting Started

Download the python script (aspace-to-trello.py):

Ideally, you'll want to save the script to a location where you have
For example, I run the script from a Linux virtual machine where I'

Install ArchivesSnake (assuming you already have P

Install py-trello

Create a Trello account (if you don't have one), and token:

See: https://trello.com/app-key

Create a Trello board and a Trello list to hold the ca

Or, if you already have a Trello account, board, and list, skip to the

Supply your Trello API credentials:

Modify aspace-to-trello.py to supply your Trello API credentials, a
Altenately, you can supply the board ID and list IDs (see comme
and list IDs, you can add .json to the end of any Trello URL and po

Replace brackets with your Trello API credentials:

```
#Authenticate with Trello (change credentials to your own)
trello_client = TrelloClient(
    api_key='[Trello API Key]',
    api_secret='[Trello API Secret]',
    token='[Trello API Token]',
)
```

Replace brackets with your Trello Board name (string must match

```
#Option 1: Get Trello Board by ID
#target_board = trello_client.get_board('[Trello Board ID]')

#Option2: Get Trello Board by Name
```

master ▾   archivesspace-trello / aspace_to_trello.py / <> Jump to ▾

noahgh221 initial commit   Lates

ஃ 1 contributor

281 lines (233 sloc)   12.3 KB

```
1   from asnake.client import ASnakeClient
2   from datetime import datetime, timedelta
3   from trello import TrelloClient
4
5   #Script uses ArchivesSpace API and Trello API to lookup recent accession records in ASpace and create new Trello cards for them.
6   #Set up a cron job to execute the script at some interval (currently written to execute every day)
7
8   #uses py-trello: https://pypi.org/project/py-trello/
9   #See: https://github.com/sarumont/py-trello/blob/master/trello/trellolist.py
10  #See: https://buildmedia.readthedocs.org/media/pdf/py-trello-dev/latest/py-trello-dev.pdf
11  #Trello board, list, name ids can be obtained by adding .json to trello URLs
12
13  #Trello API Docs: https://developers.trello.com/reference#introduction
14
15  #Authenticate with Trello (change credentials to your own)
16  trello_client = TrelloClient(
17      api_key='[Trello API Key]',
18      api_secret='[Trello API Secret]',
19      token='[Trello API Token]',
20      #token_secret='your-oauth-token-secret'
21  )
22
23  #Option 1: Get Trello Board by ID
24  #target_board = trello_client.get_board('[Trello Board ID]')
25
26  #Option2: Get Trello Board by Name
27  trello_boards = trello_client.list_boards()
28  for board in trello_boards:
29      if board.name == '[Trello Board Name]': #board name lookup
30          target_board = board
31          print ("Target Board: " + target_board.name)
32
```

https://github.com/noahgh221/archivesspace-trello

Thanks!

Questions?

Slides: https://tinyurl.com/archivesspace-trello

Github: https://github.com/noahgh221/archivesspace-trello