




The Staff Interface Enhancements Working Group Project

34 volunteers, 5 months, and one
big database



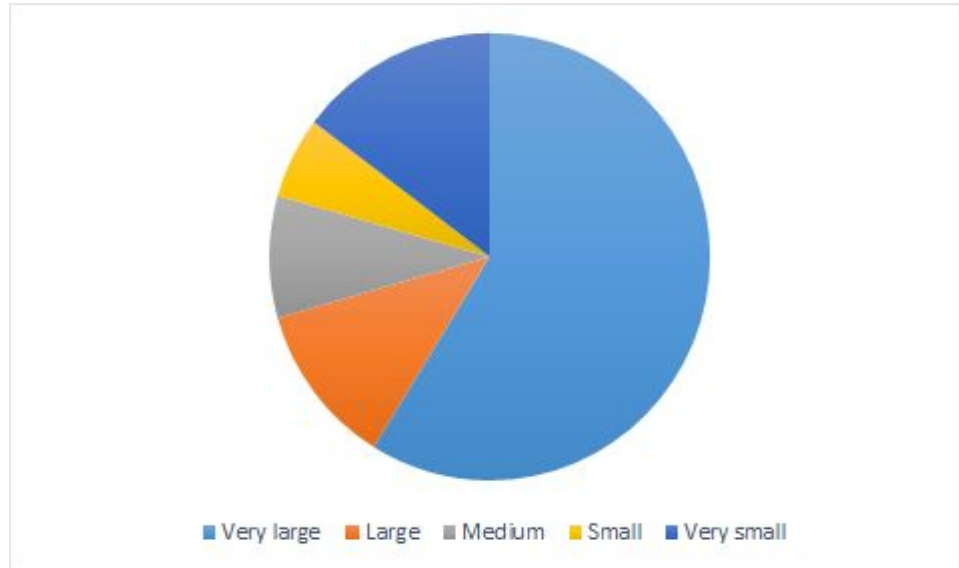
The Charge

- ❖ Review, in order to de-dupe and enhance where necessary, outstanding JIRA issues submitted by the community over the years regarding the staff interface.
- ❖ Identify areas of interest not covered by existing JIRA issues.
- ❖ Identify accessibility gaps in the current staff interface.
- ❖ Recommendations should address comprehensively and holistically the experience of the staff interface, taking into consideration the diverse experience levels and needs of staff, student, and volunteers who interact with the program
- ❖ Recommendations should consider both small and major improvements, from changing the size of labels to exploring major revisions to increase the ease and efficiency of use.
- ❖ Changes should be scalable across the entire program and incorporate improvements from the Public Interface and have a straightforward, self-explanatory, and intuitive design.

The Team

34 ArchivesSpace members from across the United States
+ 1 from Australia representing all membership categories

- very large (20)
- large (4)
- medium (3)
- small (2)
- very small (5)

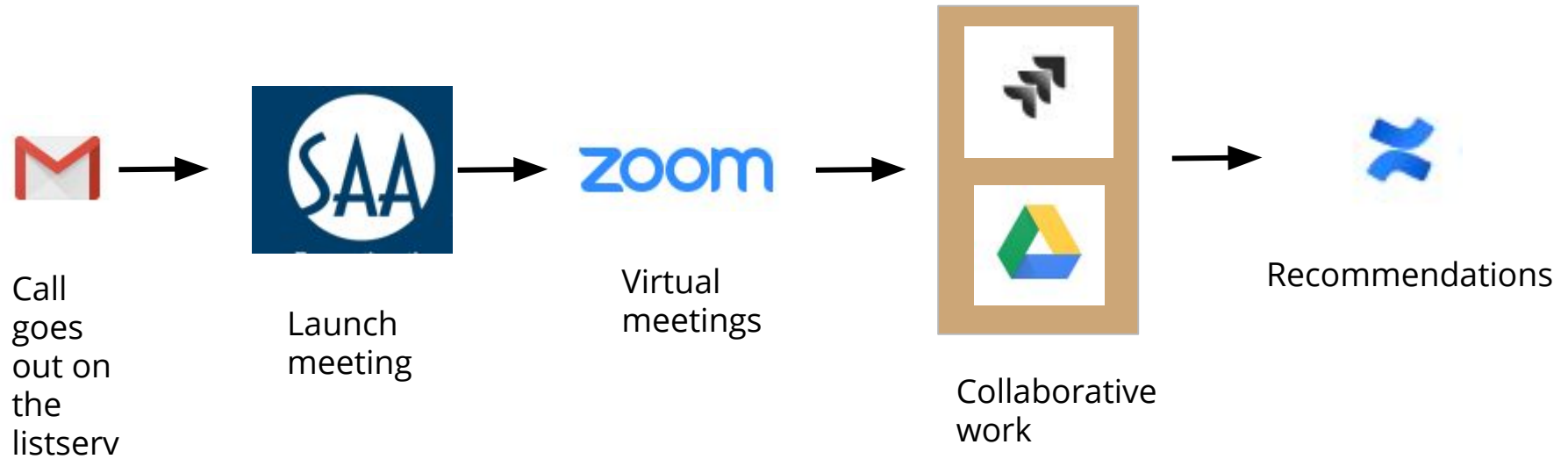


The Team

Lydia Tang, Chair, Michigan State University, Very Large
Alexis Adkins, California State Polytechnic University, Pomona, Large
John Anderies, William Way LGBT Community Center, Very Small
Joanne Archer, University of Maryland, Very Large
Thomas Allen, University of Texas at Dallas, Medium
Betsy Baldwin, MIT, Very Large
Eleanor Blackman, Case Western Reserve University, Very Large
Megan Blair, St. Edward's University, Small
Lisa Calahan, University of Minnesota, Very Large
Johanna Carll, Harvard University, Very Large
Sarah Cassone, University of Southern California, Very Large
Sara Chetney, Claremont Colleges, Medium
Lavinia Ciuffa, American Academy in Rome, Very Small
Greg Farr, Austen Riggs Center, Very Small
Linda Hocking, Litchfield Historical Society, Very Small
Ella von Holtum, Rochester Institute of Technology, Medium

Emma Jolley, National Library of Australia, Very Large
Anna Kephart, College of Southern Maryland, Small
Margaret T. Kidd, Virginia Commonwealth University, Very Large
Miloche Kottman, University of Kansas, Very Large
Jane LaBarbara, West Virginia University, Very Large
Meghan Lyon, Duke University, Very Large
Lynn Moulton, Boston College, Large
Alexandra Orchard, Reuther Library, Wayne State University, Very Large
Devon Proudfoot, University of Michigan, Very Large
Suzanne Reller, University of Cincinnati, Large
Annie Tang, Johns Hopkins University, Very Large
Linda Sellars, North Carolina State University, Very Large
Olivia Solis, University of Texas at Austin, Very Large
Mariella Soprano, Caltech, Large
Monique Sugimoto, Palos Verdes Library District, Very Small
Christy Tomecek, Yale University, Very Large
Caitlin Wells, University of Michigan, Very Large
Elizabeth Wilkinson, Yale University, Very Large

The Project



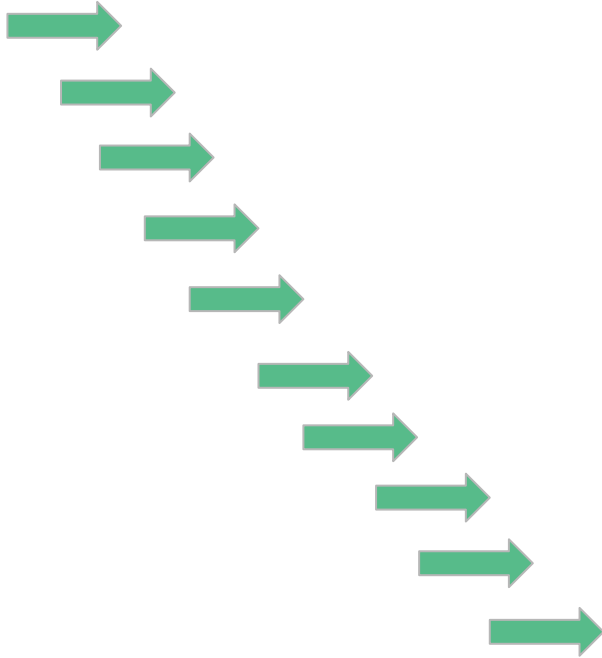
Challenges and lessons learned



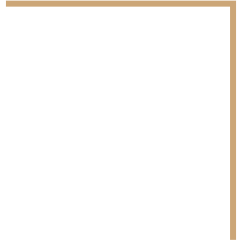
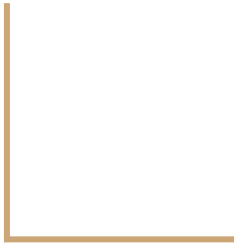
The results!

Recommendations in 10 areas emerged:

- Visual layout
- Data entry and editing
- Agents and Subjects
- Top Containers
- Background jobs
- Organization of menus
- Browsing, customization, and functionality
- Shortcut keys for ASpace commands
- User accounts
- Default permission groups



Data Entry and Editing



Editing

Bulk editing

- Rapid data edit mode to allow for bulk editing of records in layout echoing current rapid data entry feature
- Bulk edit across records for level of description and container instance fields
- Bulk delete feature for archival object records

Tweaks to current edit functionality

- Build in hover instructions for the reorder mode (currently in user manual only)
- Ability to open record by clicking on any part of the listing in the browse list or resource tree (currently must click on title)
- Multiple dates don't display in resource tree or PUI, attributes (ex. Approximate) need to be more visible, clearing date fields should be more intuitive
- Enhance merge function to make it obvious which term is the one that other terms will be merged into, make function behavior consistent across data points (currently different between merging controlled values and subject/agent records)
- Would like ability to choose which fields to carry over when merging records
- Should be more apparent when another user has record open, greater clarification on whether or not multiple users can edit different parts of the same resource at the same time, ability to lock records that are in use instead of simply issuing warning

Rapid Data Entry

More RDE functions

- Add reorder mode to RDE
- Move the add rows to the left for improved usability
- Delay auto validation in RDE so error message doesn't appear before user is able to enter data
- Ability to add all top container data in RDE, including container profile
- Ability to add agent/subjects to records in RDE mode
- Add template management (use to select, , delete, or reorder templates)
- Add keystroke shortcuts

Simple data entry

Saving

- When saving record, record should not collapse or revert to view mode.
- Autosave function desired in RDE and at set timed intervals when working in a record
- Ability to advance to other archival object records without having to save current archival object record. Ability to edit multiple AOs then save all changes in a single save function
- Allow user to open resource and related accession record in edit mode at same time, make changes, and save changes. Currently system issues warning that record is in use and forces user to refresh page, losing all edits in the process

Step back

- Add cancel changes button
- Add a step back button, allowing user to return to previous record. Particularly useful after adding digital object, top container, and location records

Ease of data entry

- Added children and siblings should be inserted immediately after the item highlighted in the hierarchy instead of as last record in hierarchy. Currently, users must move new records to the desired place in the hierarchy.

- Ability to resize notes content subfield boxes

Controlled values

- Align navigation of all controlled value list management
- Ability to drag and drop values in controlled value lists rather than using arrows to advance one spot up or down at a time
- Simplify merging in controlled value list management

Linking/sharing/reusing data

Spawning/ sharing / cloning

- Ability to spawn accession as archival object or digital record in an existing resource
- Ability to select which data points are transferred when spawning a record, including fields that aren't currently included in the current spawn feature, such as provenance and access and use restrictions
- Ability to add repository default values to spawned records as part of the spawning process
- Ability to clone resource component record.
- Ability to import data from bio note in agent record into the bio note in the resource record

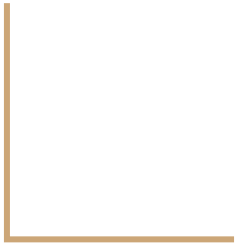
Events

- Show event records when the attached record is in edit mode
- Embed events as editable subrecords or at least display similar to linked digital object and top container records
- More documentation of terminology in event records

Linking

- Provide full bidirectional linking for all linked records
- Ability to add classification records to digital object records

Agents and Subjects



snac

Related Agents

Home / Agents

Filter by text

Record Type

- Person 1854
- Corporate Entity 597
- Family 3
- Software 1

Source

Agents

Showing 1 - 100 of 245

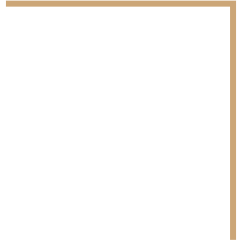
Record Type	Agent N
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<EAC-CPF>

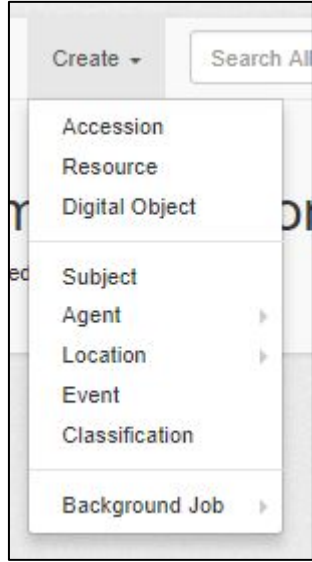
The Library of Congress



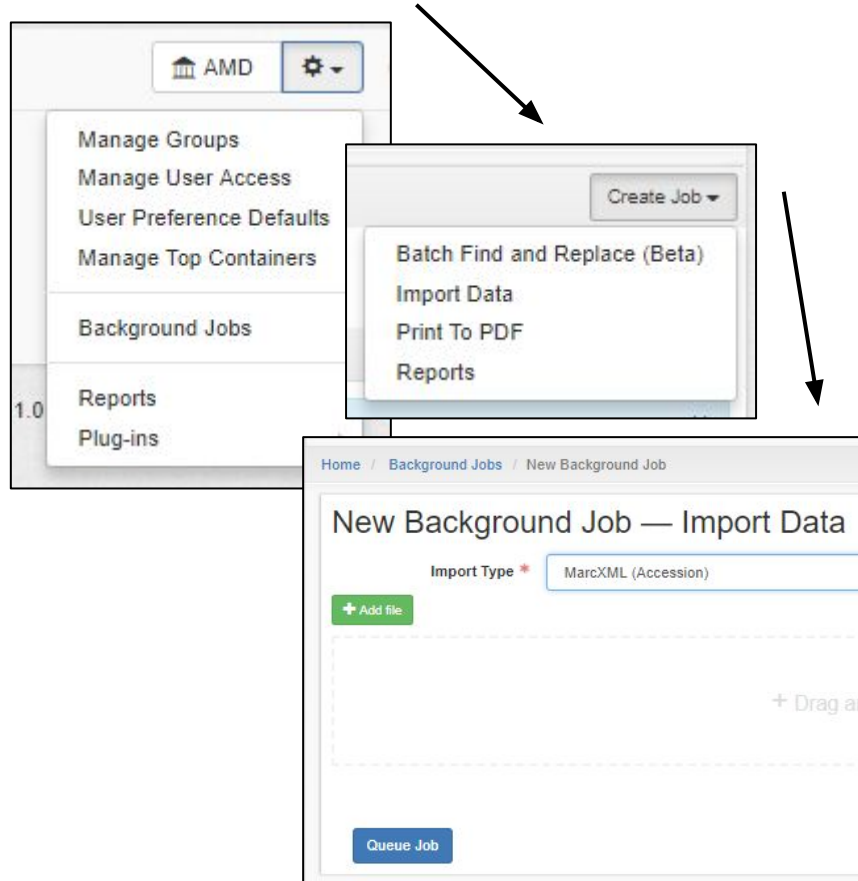
Background Jobs



① Terminology



② Layout



③ Logs

Archived Jobs	
Status	Job Type
Completed	Print To PDF
Completed	Print To PDF
Completed	Print To PDF
Completed	Print To PDF

Visual Layout

Visual Layout

- Analyze, recommend changes, options for designers'/programmers' focus - while addressing the ongoing feedback from ArchivesSpace users/members

Key Concerns, or why do we (or should we?) care?

- Some Reasons: Increase Efficiency / Make Better Use Of
 - Our Time
 - Accessibility Compliance (more Inclusive)
 - Visual Space on the screen impacts our use
 - Inclusion of Essential Information
 - I'm sure we all notice things we wish were different, or have ideas about improving something

Optimizing Time

- Lessen amount of scrolling, clicking, resizing, and dead space at the expense of prime screen real estate (for computer, or mobile phone)
- Include resource identifiers, location information, notice of restricted content for staff via staff login on PUI - making it all easier
- Increase options, customizability, many of which may also save time
 - Example readily available customization I take advantage of - I tend to want to see more of the screen, the resource tree and the content all at the same time, so I appreciate being able to do my own customization by shrinking all of the text areas to fit more on the screen, and make adjustments to the sizes of screen items, so I do not have to constantly resize and scroll back and forth - ability to customize really has an impact on efficiency (even self-help customization)
- Help one find things, quickly, examples: staff login and reset password

Accessibility

Compliance with **WCAG* 2.0** Level AA standards, examples:

- Increase contrast / color contrast, where missing
 - Example: textured area in Reorder Mode of scrolling tree too light
- Ability to set larger font size within program
- Alt-text for all images
- Tappable navigation
- Keyboard commands/shortcuts



* **Web Content Accessibility Guidelines**

Staff Login

- > A more prominent (accessibility compliant), or central sign in window

ArchivesSpace
a community served by LYRASIS

Welcome to ArchivesSpace.
Search across our collections, digital materials, and more.

*Username:
*Password:
Logon

Sign In

[Forgot Password?](#)
[First Time Users](#)

20170915-0919 | Public site | Resources | Issue Tracker | LYRASIS support

- > Having a “Forgot Password,” self-serve, option would be a great addition and time saver!

Organization of Menus

Organization of Menus

1. Consider renaming background jobs
2. When in background job browse, move functions from create job dropdown to a ribbon along top of page
3. Add search function to browse screen
4. Make browse result columns sortable
5. Add delete function to job browse list for archived jobs, which would delete the history of the job from the list, not the results of the job itself
6. Increase prominence of files that need to be downloaded after completion of job (ie generated PDF)
7. Clicking "print to PDF" in resource record should automatically run the background job. Currently, it brings user to background job page and user has to manually set up and start job
8. Enable same export background jobs for accession records that are available for resource records
9. Ability to customize file naming for export background jobs



Browsing, Customization,
Functionality,
and Terminology



Browsing, Customization, Functionality, and Terminology

- **Ability to create repository-specific template of fields that display in records**
- **Add additional fields to the user preference options, including dates and extents**
- **Ability to set a default sort when browsing**
- **Remove administrative data from the browse/search screen**
- **Add expand all/collapse all functionality to browse/search screen**
- **Customize facet ranking for browse/search results (current default # of associated records)**
- **Replace chevron next to search box with text "refine search results"**
- **Ability to view all results on a single page**
- **Ability to add more fields/customize the search results screen or add breadcrumbs similar to PUI search results to provide contextualizing resource information to keyword search result (which resource is the AO attached to?)**

Browsing, Customization, Functionality, and Terminology

- **Terminology changes**

- △ “Revert changes” ➡ **“cancel changes”**

- △ “Publish” checkbox ➡ **“public”**

- **Features**

- △ Spell check

- △ Version control information that includes data re: changes to affiliated parent/child records in addition to record being viewed

- △ Automatic deletion of **trailing whitespaces** or ability to delete trailing whitespaces through find and replace feature

- **Reevaluate collection management module** to identify and eliminate overlap with other AS functions such as events and identify features to add to module to increase functionality

Top Containers

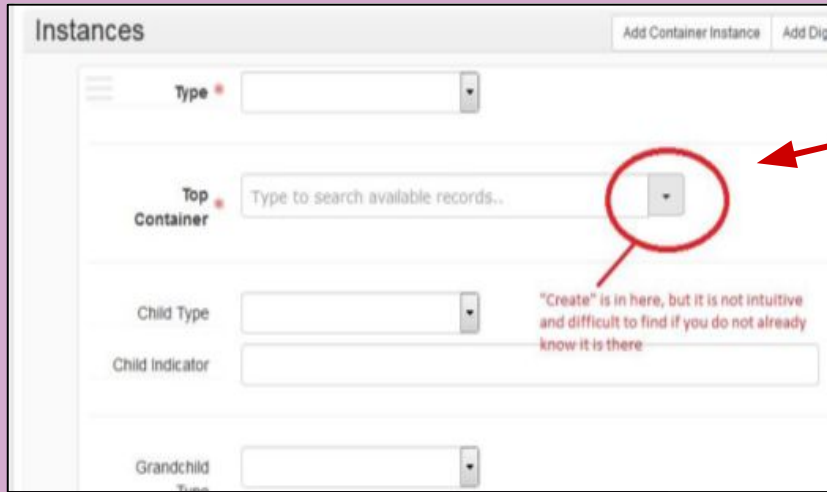
- Need cleaner, clearer navigation for accessing, editing, and creating or managing Top Containers/Profiles
 - Improve visual display
 - Expansion of functionality, efficiency
-

SOME

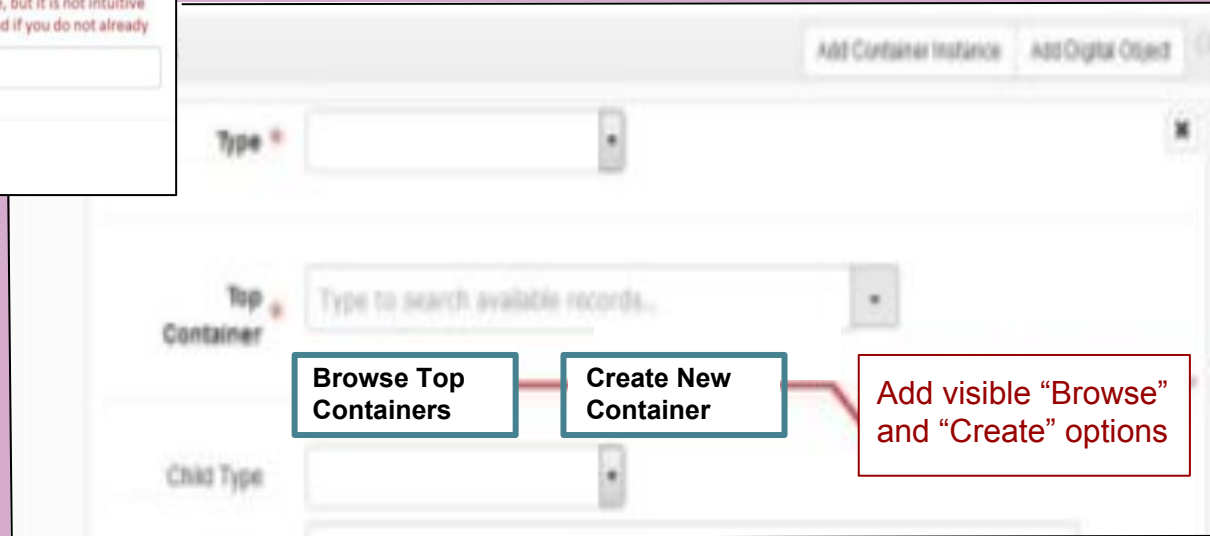
Navigation Issues

Issue 1: There's no way to create Top Container profiles from the main drop down menus

Issue 2: How to enter Top Container is confusing - small arrow not labelled or immediately apparent, especially for a new user.



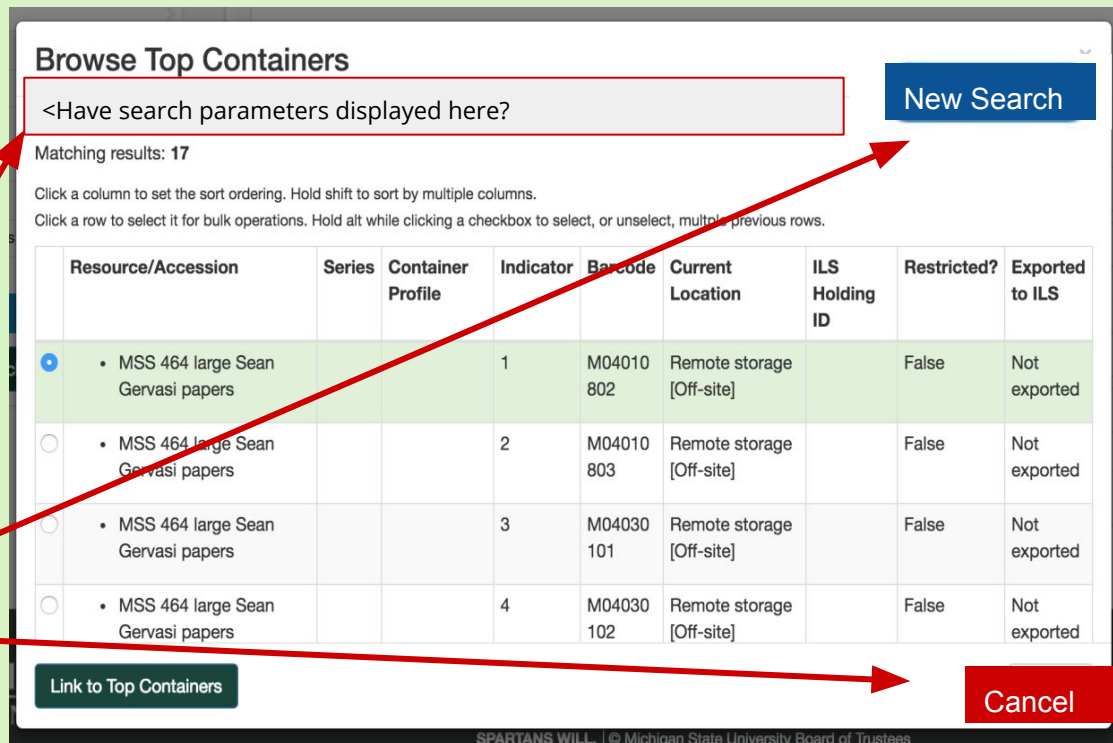
Possible solution: add visible "Browse and "Create" options below the search bar:



Issue 3: “When clicking “Browse Top Containers,” it comes to a place where you have to search for the collection you were just working on.”

Browse Top Containers

- When search results load, it would be helpful to have the search parameters show at the top,
- and to add a “New search” link.
- It would be helpful if the Cancel button could be colored red or have greater visual distinction.



Browse Top Containers

<Have search parameters displayed here?

[New Search](#)

Matching results: 17

Click a column to set the sort ordering. Hold shift to sort by multiple columns.
Click a row to select it for bulk operations. Hold alt while clicking a checkbox to select, or unselect, multiple previous rows.

Resource/Accession	Series	Container Profile	Indicator	Barcode	Current Location	ILS Holding ID	Restricted?	Exported to ILS
<input checked="" type="radio"/> • MSS 464 large Sean Gervasi papers			1	M04010 802	Remote storage [Off-site]		False	Not exported
<input type="radio"/> • MSS 464 large Sean Gervasi papers			2	M04010 803	Remote storage [Off-site]		False	Not exported
<input type="radio"/> • MSS 464 large Sean Gervasi papers			3	M04030 101	Remote storage [Off-site]		False	Not exported
<input type="radio"/> • MSS 464 large Sean Gervasi papers			4	M04030 102	Remote storage [Off-site]		False	Not exported





[Link to Top Containers](#) [Cancel](#)

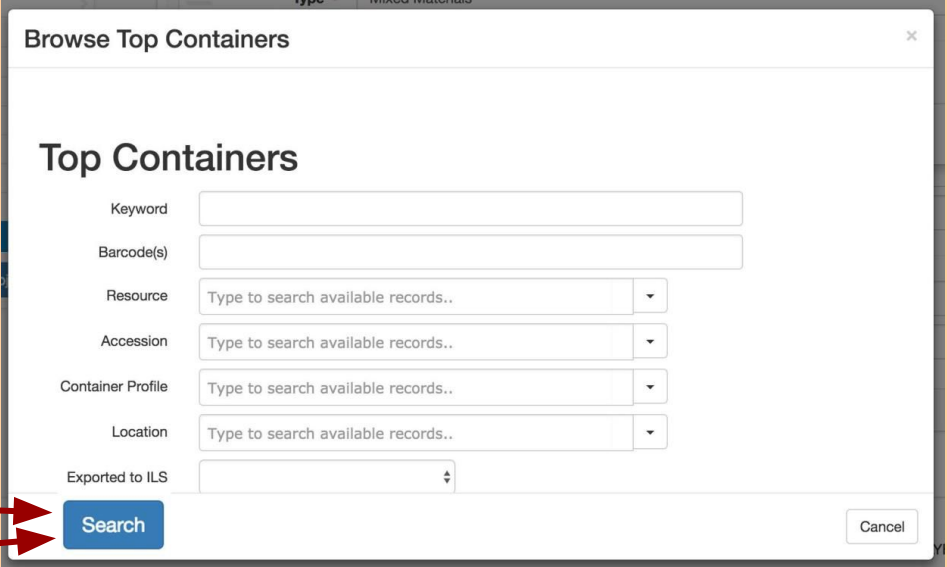
SPARTANS WILL. | © Michigan State University Board of Trustees

View of search results via cog menu > Top Container Profiles

Browsing

Issue 4: Browsing Top Containers currently is problematic because the search button is hidden from view and most people would instinctively click on “Link to Top Containers,” which doesn’t accomplish the task, or yield search results.

- Change  to  
- Then the  button should appear here - once search results are available.
- Search results should load into the viewable screen, currently results are hidden below the screen, making it seem as if the search failed to a novice.
- One should be able to select more than one top container.



Navigational Improvements

Some of the proposals:

- Pop-up/overlay, or, less preferable, a new browser tab?
- Add Breadcrumbs.
- Best not to have to re-search for a resource one was just working in to link to a top container, or return to previous search results.
- Have only (or the option to have only) top containers from the resource one is working in show, unless a search is conducted? [Add a top containers or resource top containers button?]

Home **Top Containers** Box 1

Container Information >
Active Restrictions >
Linked Records >

Clicking here only takes you back to the blank Top Container search page, instead of the record's top container list

Box 1 **Top Container**

Indicator 1
Container Type Box
Exported to ILS Not exported

Active Restrictions

No Active Restrictions

Linked Records

Showing 1 - 10 of 75 Results

Record Type	Title
Archival Object	Lovell, James cargo manifest 1811 November 13

Top Containers

REVIEW

ADD TO MENUS

RESULTS NEED ROOM

GO BACK

LINK

LINK

AUTOFILL

MERGE

LOCATIONS

- Add top containers to the browse and create menus
- Make search results more visible, give them more room, by eliminating the search boxes from the result set (from a search performed from the browse top containers screen, reached from an accession/resource/AO record)
- Ability to navigate back to a search result via breadcrumbs after opening a top container record from the result set.
- Ability to link container profiles, ILS holdings, and locations to containers in RDE
- Ability to link more than one container to an AO in the RDE
- Ability to use autofill to link containers numbered over 100
- Ability to merge top containers
- Ability to bulk update locations for collection of boxes on different shelves (identify set of containers, select bulk operation for multiple locations, screen would display location browse next to each container)

Shortcut Keys for ArchivesSpace Commands

- All commands/functions in ASpace should be accessible using the keyboard rather than only the mouse
- Development should also determine and include shortcuts for Macs
- Some commands/functions are used frequently so should have hotkeys assigned (highlighted in yellow in recommendations)

User Accounts

Add enhancements to user registration:

- Password strength
- User notified of new account with welcome and login instructions
- Profile pictures
- Locale settings

- Consolidate functions "manage users" currently under system dropdown and "manage user access" and "manage groups" under cog wheel dropdown
- Consolidate all identifying information, permission functions, and password management into user profile record allowing management of user in single screen

Update Account

Edit Account

Username *

admin

Full name *

Administrator

Email

First Name

Last Name

Phone

Title

Department

Additional Contact Information

Password *

Confirm password *

Update Account

Current user record

Password *

Confirm password *

Active user?

Default Repository?

University Archives ▼

Test Repository

University Archives

Michigan Historical Collections

Manage User Access

Groups

<input type="checkbox"/>	repository-managers	Managers of the A&M repository
<input type="checkbox"/>	repository-archivists	Archivists of the A&M repository

Fields to add to user record

- Need for easier way to browse and edit user accounts and groups
- Ability to list users with associated groups, repositories, and active/inactive status
 - Ability to sort results on the above data points as well as limit through facets



Groups

- managers
- archivists
- project-managers
- viewers

Active?

- true
- false

Repository

- UA
- MHC

Search All Agents



Create User

Users



User	Groups	Active?	Repository	
admin	none	true		Edit
dproud	archivists	false	UA	Edit
test	archivists	false		Edit
dallas	managers	true	UA, MHC	Edit
mike	project-managers	true		Edit
lilly	archivists	true	MHC	Edit
max	viewers	false		Edit
olga	project-managers	true	UA, MHC	Edit

Ability to attach user profiles to records as part of collection management subrecord, allowing for the creation of a task list for users

- Managers could assign processing of collections to specific users
- Users would be able to see the list of collections assigned to them

Collections

Showing 1-3 of 3 Collections

Sort by: Relevance ▾

	Record Type	Title	Identifier		
<input type="checkbox"/>	resource	Donald Martyn Papers	WSP000052	Created by af3973 2015-11-24 09:50:04 -0500 Last Modified by af3973 2016-12-12 19:41:54 -0500	View Edit
<input type="checkbox"/>	accession	Donald Martyn Papers	WSP000052	Created by af3973 2015-11-24 10:30:52 -0500 Last Modified by af3973 2016-12-09 13:22:29 -0500	View Edit
<input type="checkbox"/>	accession	Commonwealth College Records	LR001364	Created by dv3985 2015-12-18 15:24:49 -0500 Last Modified by af3973 2016-12-07 11:17:52 -0500	View Edit

[Create My Collections Report](#)

Ability to grant user access to specified records only instead of all records of certain type

initiate import jobs

Collection Level Permissions


Username

Add User

Resource

Type to search available records..

Devon

 John Murphy papers

- Allow users to edit their user accounts using parameters set by the system admin
- Ability to export/report on permission groups and associated users

Default Permission Groups

- Some current permission terminology is unclear (“major record groups”)
- Need to refine existing permissions (make add/edit/delete three separate functions)
- Need to create new assignable permission functions to allow for greater flexibility

What's Next?

ArchivesSpace is working with the Cherry Hill Company to provide a set of wireframes and a design guide for optimal usability and accessibility of the staff interface

- SIEWG recommendations will be used for guidance along with community input
- Aiming to have the final wireframes and design guide delivered by the end of June 2018

SIEWG Final Recommendations

<https://archivesspace.atlassian.net/wiki/spaces/ADC/pages/369557505/SIEWG+Final+Recommendations>

ArchivesSpace Roadmap

<https://archivesspace.atlassian.net/wiki/spaces/ADC/pages/18710568/Roadmap>

ArchivesSpace mailing list

<https://archivesspace.atlassian.net/wiki/spaces/ADC/pages/17137754/Mailing+Lists>