ArchivesSpace Users Advisory Council Reports Subteam:

Summary of Activities To Date, and Recommendations for the Future

Adrienne Reed Storey for the ArchivesSpace Reports Subteam, July 28, 2019

Description:

The ArchivesSpace Users Advisory Council Reports Sub-team advances the ArchivesSpace reports module by defining reports conceptually and technically, documenting how to use the reports module, and suggesting enhancements to the report processes.

Purpose: To recommend and define, from a user's perspective, functional and practical reports that meet the diverse needs of the ArchivesSpace community.

Major Activities:

- Regularly test report functionality in releases and release candidates on an ArchivesSpace-provided test server or on a local server
- Utilize tools such as MySQL Workbench, Microsoft Excel, phpMyAdmin, etc. to identify tables and fields for report definitions
- Assess and suggest improvements to overall report module functionality and user interface
- Work with developers to explore different methods of report generation within ArchivesSpace and provide useful community guidance on implementing external tools to generate custom reports

Roster:

- Alston Cobourn, East Carolina University - 2014-2019, Co-leader 2018-2019
- Nikki Lynn Thomas, University of North Carolina, Charlotte, - 2014-2019, Co-leader 2018-2019
- Ashley Knox, University of North Carolina Wilmington - 2017-2019
- Kate Blalack, Woody Guthrie Center - 2018-2019
- Adrienne Harling, San Francisco Symphony - 2018-2019
- Julia Novakovic, The Strong - 2018-2019
- Carolyn Runyon, University of Tennessee at Chattanooga, Leader - 2014-2018
- Jasmine Jones, Smith College - 2015-2018
- Nancy Enneking, Getty Research Institute, Co-Leader - 2014-2017
- Brenda Burk, Clemson University - 2015-2017
- Brad Westbrook - 2014-2015
- Mark Custer - 2014-2015
- Chris Fitzpatrick - 2014-2015

- Nathan Stevens - 2014-2015

Chronology
2014
- Migration of reports in Archivists' Toolkit to ArchivesSpace
- Identified priority to document report functionality to share with users, as well as to provide information about non-ArchivesSpace supported reports options that some institutions have developed and adopted

2015
- Identified need to have tabular data rather than pdf only options
- Developed a list and descriptions/templates for reports not in Archivists' Toolkit as recommendations
- Reports were tested for the first time by committee members

2016
- CSV functionality was specified as important to supplement the existing reports because issues with reports breaking the system or returning erroneous results - the extreme number of fields that were output were recommended to be culled down to some specified recommended fields
- Predefined reports were tested by committee members
- Predefined reports were continually reviewed and refined

2017
- Communication with developers about reports recommendations and their feasibility
- Decisions were made about which reports should have a csv export and which reports should not
- Recommendations created for 2017 March release
- Laney got all reports working
- Started development of data dictionary

2018
- Data dictionary made into a searchable app
- Reports refactored for next release by Sarah and Laney
- Continued review of recommended predefined reports
- Tested initial custom reports functionality developed by Sarah
- Shelflist report defined by Carolyn and added to system by Laney

2019
- Used ArchivesSpace open forum call to gather information about user needs
- Created additional recommendations for predefined reports
- Identified that customized reports need optimization, and that some predefined reports need to stay. Customized reports are overwhelming to systems.
- Possibility of semi-custom reports identified - subteam made recommendations for what fields should be options for inclusion in customized reports

- Decision was made to discontinue the reports subteam and pursue its ongoing work in a different way.

Current Status and Recommendations:

The reports subteam has worked over several years to migrate the Archivists' Toolkit reports into the ArchivesSpace software, to make recommendations for new reports that were not originally part of Archivists' Toolkit, to test reports, create a Data Dictionary app, and to explore the feasibility of customized reports. However, making further progress on improving the reports module in ArchivesSpace was recently acknowledged to be limited by the software capabilities at this time. The existing predefined reports are all operable at this time. Identifying the most important predefined reports to develop has been inhibited due to low response rate for an initial user needs survey. Thus, custom reports are the highest priority for meeting the widest range of user needs, yet they overwhelm systems, and this problem does not currently have a solution.

Given these factors, the reports subteam will not continue at this time. However, we recommend the following in order to continue to improve reports over time:

- Identify the potential reasons for lack of participation in user surveys, and identify other possible approaches that are more likely for success. Then, conduct a user needs survey focused on ArchivesSpace reports, and identify predefined reports that should be developed based on the survey results.
- Periodically assess the potential to develop a custom report module that works and does not overwhelm systems
- Provide clear communication about ArchivesSpace reports current functionality with end users. Include examples of known options for producing reports that are not hosted by ArchivesSpace. We recommend that this work be done by a short term workgroup.