Implementing ArchivesSpace: Migrating, Updating, Cleaning, and Customizing Online Finding Aids at Rollins College

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Reasons we made the switch...

- Archon is unsupported as a tool as of January 2014
- Archon search tool was failing, search results sometimes unsuccessful
- Updated interface was needed, in terms of college branding
- Desire to improve overall usability and navigation
- Part of a larger strategic plan to support digital collections (Digital Objects)
- ArchivesSpace was the only viable option; very few alternatives on the market
- We were able to host it locally, which was a priority for us
Transition Timeline

- Archon no longer supported: Jan 1, 2014
- Migration to ArchivesSpace Complete (Version 1.4.2): Aug 30, 2017
- Upgrade to Version 2.1.0 (RC2) Completed by Husdon Molonglo: Aug 15, 2018
- Staff Training Sessions from ArchivesSpace Consultant, Noah Huffman: Dec 1, 2018
- Upgrade to newest version?: Dec 4, 2019

Activities:
- Running both Archon and ArchivesSpace: Aug 31 - Aug 30
- Data Clean Up: Jan 3 - Dec 1
- Student Training: Jan 3 - May 1
- Gather User Feedback: Jun 1 - Dec 1
Challenges: Technology

## AppConfig

```python
# AppConfig[:realtime_index_backlog_ms] = 60000
#
# AppConfig[:notifications_backlog_ms] = 60000
# AppConfig[:notifications_poll_frequency_ms] = 1000
# AppConfig[:max_usersnames_per_source] = 50
#
# AppConfig[:demo_concise_flag] = proc { File.join(AppConfig[:data_]
# AppConfig[:locale]) == :en
#
## Report Configuration
# AppConfig[:report_page_layout] uses valid values for the CSS3 page directives.
# AppConfig[:report_page_layout] = "letter landscape"
# AppConfig[:report_pdf_font_path] = proc { File.join("/usr/share/DejaVu_Sans", "sans-serif")
#
## Additional configuration
AppConfig[:plugins] = ["rolls_theme", "local", "Icnaf", "aspace-pui"
AppConfig[:pui_branding_img] = "assets/rolls-college-W.png"
#
## URL to direct the feedback link
AppConfig[:feedback_url] = "archives@rolls.edu"
#
## The following are used by the aspace-public-formats plugin
# https://github.com/archivespace/aspace-public-formats
# AppConfig[:public_formats_resource_links] = []
# AppConfig[:public_formats_aspace_object_links] = []
# AppConfig[:aspace_public Formats_resource_links] = nil
# AppConfig[:aspace_public Formats_aspace_object_links] = nil
AppConfig[:pui_hides][:acessions] = true
```

## publish

```ruby
publish: Publish?
publish_tooltip:
  # Determines whether this Digital Object or Component will be published to public level: VRA Core Level level_tooltip: |
  # This represents for use in multi-level VRA Core compliant records in order to indicate:
digital_object_type: Type
digital_object_type_tooltip: |
  # A generic term indicating the basic content type of the digital object. The def:
  # element.</p>
  language: Language
language_tooltip: <p>The language for the digital content.</p>
restrictions: Restrictions?
restrictions_tooltip: |
  # A check box for indicating that restrictions apply. The restrictions can be exp:
file_versions_tooltip: |
  # A link to a digital object or digital object component to an associated content fil:
singular: Digital Object
plural: Digital Objects
digital_object_component: 
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digital_object_component: 
```
Challenges: Technology

Migration Woes:

- Data didn’t transfer perfectly between Archon and ArchivesSpace.
- This is a locally hosted, open-source software, so we had to depend heavily on forums and listservs for technical info.
- System runs on Linux, requiring library admins to brush up on command line procedures.

Data Cleanup Projects:

- Before updating, data was sent to a contractor (Hudson Molonglo) to clean up records and metadata that didn’t migrate correctly, and to match standards for ArchivesSpace. They also managed the update to 2.1.0.
- (This wouldn’t have been necessary if we were a library who was starting our data entry from scratch.)
Challenges: Technology

Update Hurdles:
- We “hopscotched” across multiple versions, which required several updates in succession (1.1, 1.2, etc.) It is easier to start from the most recent edition and update infrequently and only as needed.
- Too many updates in rapid succession broke our database, requiring us to roll back versions.

Aesthetic Tweaks:
- It is harder to customize the look and feel in older versions. For example, it is not clear how to tie in custom logos and style sheets.
- We had a vendor (Hudson Molonglo) help with our public user interface.
- Later versions are easier to customize, but requires knowledge of Cascading Style Sheets (CSS).
Challenges: Training

- Migrations are an experiment in change management. Consider the human impact of this change and support your team members by ushering them through the process.

- Archives staff need training in how to enter new records, edit existing records, and navigate search functions (which are quite different from Archon). We achieved this with a combination of self-guided training and a few training sessions with an outside consultant (Noah Huffman, Duke).

- New and changing personnel have made retraining critical as well.

- Students and volunteers needed basic training as the vocabulary and structures used in ArchivesSpace are mix of tech jargon and archival terminology. We designed a short “test” module for them.

- IT and System Admins may also need to be trained. Those with SQL database experience and Linux command line procedures will be best prepared to work on the back end of ArchivesSpace.
Challenges: Procedures and Planning

Adjusting Procedures (staff side):

- Processing and description procedures had to be readjusted and standardized. We had to make decisions about how to work with new fields (e.g.: “Top Container”) and how to fit our organizational practices into the tool’s built-in hierarchical structures.
- The Library System Admin also had to adjust. We now schedule regular checks on the server, trimmed down our log files, and reboot as needed.

Preparing for Future Updates:

- Future plans for improving the system and our ability to use it may require updates. This will certainly involve: cleaning up old versions from server, purging old log files, making other small tweaks to keep everything running smoothly.
- Future updates will be informed by the documentation we’ve created thus far. They could also reveal new issues and challenges.
Outcomes
Lessons Learned

- Be aware of “early adopter” struggles
- Know the difference between On-Premise and Hosted [Note: If hosting locally, it is essential to have a good working relationship with your IT staff!]
- Seek outside help and training early on to prepare your people
- Have a flexible and long-term timeline
- Think about running parallel systems
- Make sure you get to know your collections and finding aids, so you can anticipate where problems might pop up
- Plan for future and ongoing data-clean-up projects
- Think about your customization and branding needs
- **Document your process**, to prepare for future upgrades and/or staff changes
Ongoing Projects

- Homepage customization
- Adding help info or wayfinding information
- Improve the stability of the system (Upgrade?)
- Improve metadata for existing and new collections (e.g.: location metadata)
- Better discoverability on the web (SEO)
- Add to the Digital Object module to connect finding aids with other online collections
- Conduct usability testing to hear from end users and review site analytics
Technical Resources

Code Academy ([https://www.codecademy.com/](https://www.codecademy.com/)) - Free online training in command line and CSS for admins. Yes, you can do it!

ArchivesSpace Github ([https://github.com/archivesspace](https://github.com/archivesspace)) - Documentation and file downloads. Essential!

ArchivesSpace Wiki ([http://wiki.archivesspace.org](http://wiki.archivesspace.org)) - Comprehensive site with both organizational and technical documentation

ArchivesSpace Development Catalog ([http://development.archivesspace.org](http://development.archivesspace.org)) - Where you can find updates on reported or known issues

Google Listserv ([https://groups.google.com/forum/#!forum/archivesspace](https://groups.google.com/forum/#!forum/archivesspace)) - Open to non-members and often has a lot of helpful technical information
Training Resources

ArchivesSpace User Manual (https://docs.archivesspace.org/_help_proxy/login) - members only but includes everything from a glossary to step-by-step screencasts

Virginia Tech’s ArchivesSpace Manual for Special Collections (https://www2.archivists.org/sites/all/files/archivesspace_2017-04-13_virginia-tech_special-collections.pdf) - updated March/April 2017 and reflects usage of ArchivesSpace 1.5.x

Yale’s ArchivesSpace Manual and Training Videos (https://guides.library.yale.edu/archivesspace/training) - includes info on the new “Top Container Model” and it's complexities (https://guides.library.yale.edu/archivesspace/ASpaceContainerManagement)

NYU’s ArchivesSpace Training Guide and Resources (https://guides.nyu.edu/archivesspace/training) - intended for student users, includes activities and evaluation
ArchivesSpace Resources

Member Listserv (archivesspace_users_group@lyralists.lyrasis.org) - they also routinely post to the SAA Collection Management Tool Section listserv

Website (http://archivesspace.org) and Blog (http://archivesspace.org/using-archivesspace/blog) -

Lyrasis Hosting Info (https://www.lyrasis.org/technology/Pages/ArchivesSpace-Hosting.aspx)- for information specifically on pricing contact Madeline Sheldon (madeline.sheldon@lyrasis.org)

Christine DiBella (christine.dibella@lyrasis.org) - ArchivesSpace Program Director and expert on all things ArchivesSpace, an amazing resource!

Christine Kim (christine.kim@lyrasis.org) - ArchivesSpace Community Engagement Organizer, lead author of listserv and blog content, organizes open member calls as well as webinars
Human Resources

In addition to the above resources we also benefited from the help of the following consultants for technical work and individual trainings, respectively:

James Bullen (founder of and lead developer at Hudson Molonglo, the creator of ArchivesSpace) - James and his team helped us update to Version 2.1.0, tackle a major data clean up problem, and begin customizing our interface.

Noah Huffman (Digital Archivist at Duke University and experienced ArchivesSpace instructor) - Noah led us in an individualized 2-day training focused on learning the ins-and-outs of the staff interface, and also helped us sort through a container management issue.