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ArchivesSpace in a Shared Environment: The University of Nebraska Consortium of Libraries Experience

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ArchivesSpace in a Shared Environment: The University of Nebraska Consortium of Libraries Experience

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NLA/NSLA Annual Conference, Lincoln, NE
October 5, 2018

A bit about our collections and us . . .

- UNO
 - University Archives, Special Collections. Afghanistan Collection, U.S. Senator Chuck Hagel Archives
 - UNMC
 - University Archives, History of Medicine in Nebraska, Wolf Wolfensberger Collection, Art, and Artifacts
 - Varied state of the collection with a large majority unprocessed
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- 



UNO & UNMC Partnership

- Idea, resource and document sharing
 - Giving feedback as we search for a CMS
 - Sharing policies and procedure documents to help us develop our own
 - Allowing use of their book scanner and sharing their staff expertise
- UNMC's Chancellor Gold is appointed Chancellor of UNO and UNMC
 - Increase emphasis in partnerships and collaboration





University of Nebraska Consortium of Libraries (UNCL)

- **Mission:** UNCL leads the University of Nebraska libraries to create and sustain a rich, supportive, and diverse knowledge environment that furthers teaching, learning, and research through the sharing of collections, expertise, and programs.
- Emphasis in shared projects especially to enhance access and provide cost savings.
- Areas involve Institutional Repositories, Archives, Collections, Research Services, etc
 - Archives groups first priorities were creating online exhibits and investigating ArchivesSpace as a shared resource



About



ArchivesSpace

a community served by LYRASIS

- <http://archivespace.org/>
- Open source archival automation product
- Web-based application for description and arrangement of archival material, both analog and digital
- Born from the merger of Archivists' Toolkit and Archon
- DACS-compliant archival resource description
- Can import/export EAD or MARC (XML)
- Hosting options available

ArchivesSpace Membership or Not?

Membership **not** required to download and use ArchivesSpace

But members can:

- Vote on the board
- Vote on development priorities
- Subscribe to the support listserv
- Access training materials
- Support continued development of the product



ArchivesSpace
a community served by ✨ LYRASIS

LYRASIS Membership or Not?

LYRASIS membership is separate from ArchivesSpace membership

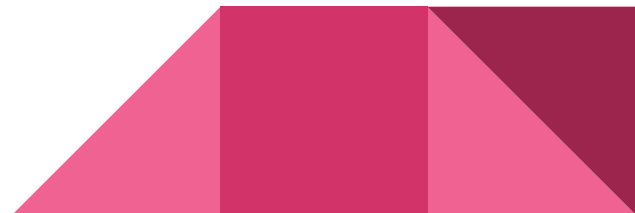
If hosted by LYRASIS, they will:

- Handle the data migration
- Provide hosting
- Provide ongoing support
- Provide training



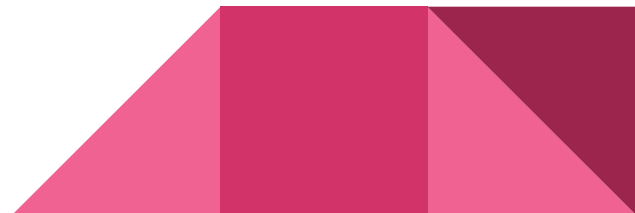
Demo!

<https://archives.nebraska.edu/>



UNO's Experience with ArchivesSpace

- Went live in 2014, when ArchivesSpace was still new and unpolished
- Hosted by LYRASIS
- US Senator Chuck Hagel Archives migrated from Archivists' Toolkit
- Other UNO collections migrated from a spreadsheet
- Students and volunteers build component trees as they process each collection
- New accessions described in ArchivesSpace from the start
- Now a routine, mundane part of our workflow





UNMC's Experiences with prepping for ArchivesSpace

- Public Sandbox vs a test repository on UNO's instance
- Started gathering sample documentation and workflows
 - UNO was a great partner sharing documentation and giving demonstrations
 - SAA's Collection Management Tool (CMT) Section Documentation portal
 - <https://www2.archivists.org/groups/collection-management-tools-section/cmt-documentation-portal>
- Evaluation of our current processes lead to bigger questions
 - Numbering system?
 - Accession process/donation records?
 - University Archives - What are its collections?



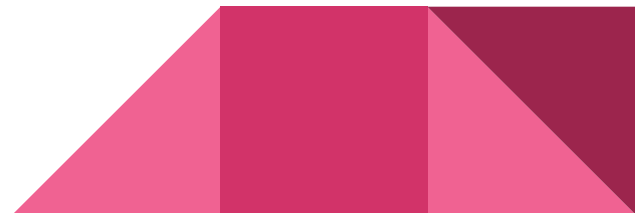
UNMC Begins to use ArchivesSpace

- Focused on creating accession procedures
- Developed resource record process and workflow using a test collection
- Created our first archival inventory to allow for Collection level migration to new instance

Local Identifier (DACS 2.1.3) <unitid>	Name and Location of Repository (DACS 2.2.2) <repository>	Title (DACS 2.3) <unittitle>	Dates (DACS 2.4) <unitdate>	Extent - in cubic feet with # of containers in "()" (DACS 2.5.4) <extent>	Extent - containers (DACS 2.5.) <extent>	Creator 1 (DACS 2.6) <origination>	Scope & Contents Note (DACS 3.1) <scopecontent>	Subjects 1 <control access>	Subjects 2 <control access>	Arrangement note (DACS 3.2) <arrangement>	Processing information note - Staff and date (DACS 8.1.5) <processinfo>	General Notes(location, artifacts, formats)-ejt
VC-002	Special Collections & Archives, McGoogan Library of Medicine, University of Nebraska Medical Center.	History of Medicine Artifacts Collections	1860-2010	200 cubic ft			Medical related artifacts including medical instruments, scientific tools, pharmaceutical materials and medical cabinetry					
UNMC-001	Special Collections & Archives, McGoogan Library of Medicine, University of Nebraska Medical Center.	College of Medicine Collection	1912-present	64.37 cubic ft.	no containers	University of Nebraska College of Medicine	The College of Medicine Collection comprises materials created by and about the College of Medicine of the University of Nebraska including its various departments and programs. The collection contains reports, handbooks, news clippings, publications, and histories.	Schools, Medical	Education, Medical	Arranged into folders	Processed by McGoogan Library staff prior to 2017	8 CD, magnetic recording tapes

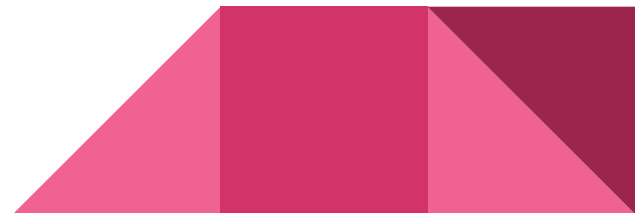
Bringing ArchivesSpace to UNCL

- All Archives Meeting develop a proposal of projects to submit to Executive Team
- Creation of a sub-committee in July 2017 to begin investigating the feasibility of moving to one instance
- Sub-committee brainstormed ideas for our ideal in managing and making our collections accessible.
 - UNL hosting to save money
 - Big Dream - one day to have a Nebraska Union Catalog
- Discussion of current set-up at campuses
 - What works and what could be better
 - What would we like to gain from going on one instance



Investigating our options

- Reached out to archival and ArchivesSpace Community for similar projects
 - Orbis-Cascade (Washington-Oregon)
 - California Digital Library
 - Tri-College (Philadelphia area)
 - Five Colleges (Massachusetts)
- Investigated hosting options
 - Can UNL host all the campus?
 - Should we use a hosted version?
 - Lyris
 - Library host
 - Aeon



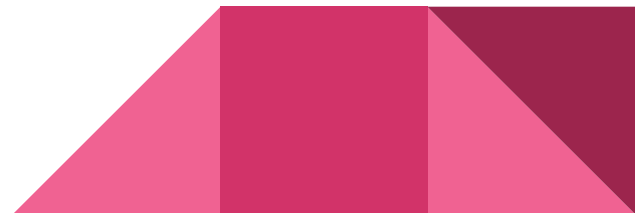
Option: Each Institution in Separate Instances

Pros

- Local customization
- Institutional branding
- No "clutter" from other institutions' records
- At the time we started our inquiry, ArchivesSpace didn't really have multi-institution membership options

Cons

- Higher cost
- Requires a fifth instance to serve as a common search portal
- Difficult to bring in future partners
- Loss of efficiency of shared subjects and agents



Option: All Institutions in a Shared Instance

Pros

- Lower cost
- Increased standardization
- One stop searching
- Can limit search/browse to single repository or search all at once
- Shared subject, agent, and location records

Cons

- "Static"/"clutter" in search/browse
- Duplicate agents and subjects
- Large amount of post-migration data cleanup
- Location entry challenges
- Slower decision-making timeline



Hybrid Option We Considered

- UNO, UNMC, and UNK in a shared instance, with UNL maintaining a separate instance
 - Permanently?
 - Temporarily, with UNL later joining the shared instance?
- At first, seemed like a "best of both worlds" compromise, but ended up looking like the "worst of both worlds"



What We Decided

- All together in a single, shared instance
- All migrating at the same time
- Hosted by LYRASIS
- Single ArchivesSpace membership for the group
- Each campus has one or more separate repositories within the instance
- Best practices and shared workflows to be developed



[Home](#)

[Repositories](#)

[Collections](#)

[Digital Objects](#)

[Accessions](#)

[Subjects](#)

[Names](#)

[Classifications](#)



August 2018 Review Site

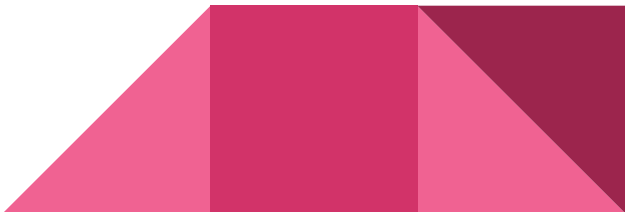
- LYRASIS created a test site with the metadata from all four campuses
- UNO's data went in first, because we had the most viable pre-existing location records, and we could only keep one institution's location records.
- We kicked the tires and looked for things that might have broken during migration
 - Did linked records retain their links? Yup.
 - Were component trees intact, including hierarchical nesting? Yup.
 - Were container records and locations where they were supposed to be? Yup.
 - Did {this, that, and the other} look as we expected them to? Yup.
 - Was any data missing? Not that we could find.
- Success! 👍

Go-Live

- The review site was discarded and the new site built fresh
- The new instance went live over Labor Day weekend
- The real migration went just as smoothly as the August test migration
- New site has a new URL, so any external resources we had linking to ArchivesSpace now had broken links
 - That cleanup project is ongoing.
- By mid-September, we had formed some task forces
- We planned to be in full production by October 1
 - That's this week! We made it, more or less.
 - UNMC's data still being formatted for migration.
 - We are all still in shakedown mode.

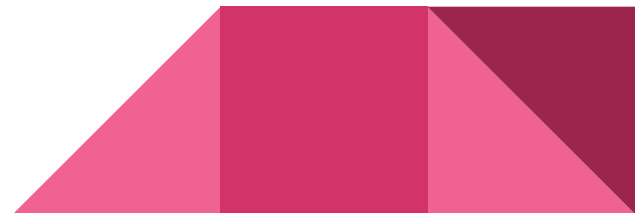


Benefits of the Consortium Model


- Money or Time Saver
 - For UNO, UNMC and UNK we are each saving 65-75% the cost of hosting individually
 - For UNL it ends up costing them more but they are saving ITS time and frustration
 - Easier access to the collections
 - Users can easily search across repositories or just focus on one
 - More visibility to the repositories
 - Archival Community
 - Documentation/Training
 - Troubleshooting support
 - Network for future collaborations
- 

Things to consider/What could have worked better . . .

- Everything takes more time than you think it will
- Communication is key
- Inconsistent metadata
 - Pre-migration clean-up
 - Start discussing best practices before migration

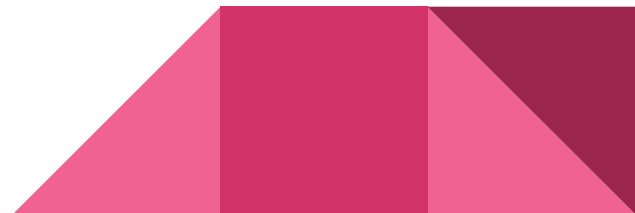


Where it stands now

- We've JUST gone live, so we're still learning!
 - The next six months will really reveal how successful we've been
 - Three task forces are beginning their work
 - Operations
 - User Groups
 - Best Practices
 - Metadata cleanup projects are still being defined, and are likely to be ongoing
 - Agents
 - Subjects
 - Locations
- 

Plans for the future

- Develop shared standards and best practices documentation
- More task forces, as the current ones finish their work
 - Researcher Experience Task Force already planned
- If all goes well, a few years down the line, potentially open to other Nebraska institutions



Questions?

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