10-5-2018

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
- 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
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](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

<table>
<thead>
<tr>
<th>Local Identifier</th>
<th>Name and Location of Repository</th>
<th>Title</th>
<th>Dates</th>
<th>Extent</th>
<th>Creator</th>
<th>Scope &amp; Contents Note</th>
<th>Subjects</th>
<th>Arrangement note</th>
<th>Processing Information note</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNMC-001</td>
<td>Special Collections &amp; Archives, McDougall Library of Medicine, University of Nebraska Medical Center</td>
<td>College of Medicine Collection</td>
<td>1912-present</td>
<td>64.37 cubic ft</td>
<td>no containers</td>
<td>University of Nebraska College of Medicine</td>
<td>Medical related artifacts including medical instruments, scientific tools, pharmaceutical materials and medical cabinetry</td>
<td>Schools, Medical</td>
<td>Arranged into folders</td>
</tr>
<tr>
<td>VC-002</td>
<td>Special Collections &amp; Archives, McDougall Library of Medicine, University of Nebraska Medical Center</td>
<td>History of Medicine Artifacts Collections</td>
<td>1960-2010</td>
<td>200 cubic ft</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- 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?
    - Lyrasis
    - 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
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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