

Welcome to the Archon/ AT Integration Project Webinar

- The webinar will begin promptly at 8:00 p.m. GMT and end at 10 p.m. GMT.
- If you have not connected to the audio portion of the webinar, please call 866.740.1260 (access code 8220612)
- If you need help, contact Tech Support at 800.843.9166 or chat with the co-presenters



AT / Archon Integration Project: Prioritizing Functional Requirements



December 8 & 10, 2009

What we want to avoid...



How potential users described it



How the project leader understood it



How it was designed

Today's speakers & facilitators



Chris Prom (Archon)



Annie Ross (AT)



Scott Schwartz (Archon)



Lisa Spiro (Moderator)



Brad Westbrook (AT)

Objectives of webinars

- to identify any requirements that are lacking from the requirements document
- to prioritize the proposed requirements as being *essential, very important, less important, or not needed.*

Webinar ground rules

- Please participate actively.
- Please offer constructive, honest feedback.
- Complete the pre- and post-webinar activities.
- Focus on the webinar.
- Stay on topic.
- The first time that you make a comment, please say your name and institution.

Making comments via chat

Use chat to:

- Ask questions
- Continue discussions
- Register a point for the record
- Advise the team of technical problems (via private chat to Lisa, Annie or Scott)



We may not be able to address every “chatted” remark during the webinar, but we will respond later.

How to make a spoken comment if we need to mute the lines...

- Click “Raise Hand” (it’s under the chat box) and wait to be called on
- When you are called on, hit *7 on your phone to unmute your line
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- Hit *6 to re-mute your line



Schedule

DAY 1: Dec. 8, 2009	
Overview	10 minutes
Functional Areas	
• Repository information	5 minutes
• Staff and public user information	5 minutes
• Collection management	5 minutes
• Classification	5 minutes
• Location / space management	15 minutes
• Accessions	10 minutes
• Resource description	10 minutes
• Digital object description	10 minutes
• Name headings	15 minutes
• Subject headings	10 minutes
Day 1 summary	10 minutes

DAY 2 , Dec. 10, 2008	
Day 1 review and Day 2 overview	10 minutes
Functional areas	
• Rights description	10 minutes
• Deaccessions	5 minutes
• Assessments	15 minutes
• Work orders	10 minutes
Web access	30 minutes
Application Functions	15 minutes
Imports / Exports	15 minutes
• Reports	
• Exports	
• Imports	
• Stylesheets	
Day 2 summary	10 minutes

Repository information

- Provide basic description and information regarding one or more repositories
- Salient features:
 - Ability to record statistics as institutional profile
 - Grouping and linking of records
 - User limits

Repository information discussion

- Ideas for enhancing this area?
- Anything lacking?
- Anything unnecessary?
- Questions?

Staff and public user information

- **Staff users:**
 - Account information and login credentials
 - Permissions on particular repositories, functional areas, and system administration tasks
 - User groups and advanced permissions
- **Public users:**
 - Self-registration feature on website
 - Ability to redirect to circulation management/request systems or e-commerce applications

Staff and public users discussion

- Ideas for enhancing this area?
- Anything lacking?
- Anything unnecessary?
- Questions?

Collection management

- A provisional functional area for recording task information pertinent to the management of collections, such as acquisitions transactions, transference of intellectual rights, processing of materials, cataloging, etc.
- Must be capable of linking to a family of material records, that is, accession, resource, and digital object records
- Extendable
 - More tasks
 - Business process management

Collection management discussion

- Ideas for enhancing this area?
- Anything lacking?
- Anything unnecessary?
- Questions?

Classification management

- Operative Archon ‘manager’
- No substantive effect on EAD or MARC output
- Group top-level resource records into record groups, subgroups, or ‘meta-collections’ on public website.

Classifications discussion

- Ideas for enhancing this area?
- Anything lacking?
- Anything unnecessary?
- Questions?

Location and space management

- Define storage locations and attach them to resource records.
- Archon vs. AT approach
 - Archon: Aggregate information attached to top level resource
 - AT: information attached to intermediary instance, of resource or any child resources;
 - can be container (Box 1) or range of containers (Boxes 1-34).
 - container(s) record linked to instance and to location
- New application will facilitate both approaches, with simplified interface

Locations discussion

- Ideas for enhancing this area?
- Anything lacking?
- Anything unnecessary?
- Questions?

Accessions

- For recording accession transactions (accession ID and date required)
- Salient features:
 - Extensive description of accession (e.g. scope content, condition, inventory, retention rules, etc.
 - Multiple user definable fields
 - Linked names and subject for more content / context
 - “Spawn” initial resource record

Accessions discussion

- Community requests:
 - Multiple extent statements
- Ideas for enhancing this area?
- Anything lacking?
- Anything unnecessary?
- Questions?

Resource description

- For arranging and describing processed archival materials. Resource may be item or aggregation
- Salient features:
 - Multi-level description largely compliant to DACS at parent and component levels
 - Supports most of EAD schema, including structured data and wrap & tag editor
 - Includes concept of instance (description > 1 or more instances > container(s) > location(s))
 - Linked name / subject headings

Resource description discussion

- Community requests:
 - Multiple extent statements
 - Compliance to other descriptive standards, e.g. RAD, CCO
- Other ideas?
- Anything lacking?
- Anything unnecessary?
- Questions?

Digital object description

- For recording information about digital objects (digitized and born digital), supporting three work flows
- Salient features
 - Multi-level description tool enabling logical / physical structuring
 - Description can be anchored in work (technical metadata in dig. obj.)
 - 20 default notes, such as abstract, dimensions, processing note, etc.
 - Linked name and subject headings
 - Link to multiple file versions

Digital object description discussion

- Community requests:
 - PREMIS technical metadata
 - Elements for logical file (ARK, etc) and physical file
- Ideas for enhancing this area?
- Anything lacking?
- Anything unnecessary?
- Questions?

Name headings

- For recording and managing personal, corporate, and family name forms
- Salient features
 - Mostly compliant with ISAAR (CPF) standard and supporting EAC and MADS xml exports
 - Link to other established forms (see also) and non-preferred forms (see from)
 - Link to other records as creator, subject, source, vendor, rights holder, etc.
 - Contact info for selected names, w/ activity log

Name headings discussion

- Community requests:
 - Place activity log elsewhere, perhaps collection mgmt?
- Ideas for enhancing this area?
- Anything lacking?
- Anything unnecessary?
- Questions?

Subject headings

- Manage single or multi-part subject headings
- Record their type and the vocabulary from which they drawn
- Link them to resources, digital objects, and accessions.

Subjects discussion

- Ideas for enhancing this area?
- Anything lacking?
- Anything unnecessary?
- Questions?

Day 1 wrap up: summary questions

- What did you learn today that excites you?
- What did you learn today that worries you?
- What features are most important?
- What features could you live without?
- What ideas do you have that we could use to extend and improve the software?

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Day 1 Review: What We Heard

- Balance ease of installation/use and robustness of features
- Be flexible; customize workflows to support small archives to large consortia
- Limit access to private information
- Comply with standards: EAC, RAD, MODS, ISDIAH, EAG, etc.
- Make it easy to migrate
- Interoperate with other applications to extend the functionality
- Communicate and collaborate with the community

Day 2 Schedule

DAY 2 , Dec. 10, 2008	
Day 1 review and Day 2 overview	10 minutes
Functional areas	
<ul style="list-style-type: none"> • Rights description 	10 minutes
<ul style="list-style-type: none"> • Deaccessions 	5 minutes
<ul style="list-style-type: none"> • Assessments 	15 minutes
<ul style="list-style-type: none"> • Work orders 	10 minutes
Web access	30 minutes
Application Functions	15 minutes
Imports / Exports	15 minutes
<ul style="list-style-type: none"> • Reports 	
<ul style="list-style-type: none"> • Exports 	
<ul style="list-style-type: none"> • Imports 	
<ul style="list-style-type: none"> • Stylesheets 	
Day 2 summary	10 minutes

Fair Warning...

- If there's time at the end of the webinar, we will call on every participant to express an idea, priority, or concern

How to make a spoken comment if we need to mute the lines...

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Rights description

- Proposed functional area for recording and managing rights information
- Salient features targeted:
 - Based on PREMIS Rights schema
 - Supports copyright, statutory and license rights
 - Indicate permissions granted
 - Indicate restrictions
 - Linked name records for rights holders
 - Link to accession, resource, and digital object records

Rights description discussion

- Ideas for enhancing this area?
- Anything lacking?
- Anything unnecessary?
- Questions?

Deaccessions

- Sub-record for indicating items, parts of collections, or entire collections that have been removed from a repository's custody
- Salient features
 - Describe material(s), and indicate date reason, extent, and disposition of deaccession
 - Link to accession, resource, and digital object records
 - List deaccession records and restore to materials to active custody

Deaccessions discussion

- Ideas for enhancing this area?
- Anything lacking?
- Anything unnecessary?
- Questions?

Assessments: AT

- For recording and producing quantitative / qualitative assessment of archival materials to guide appraisal, processing, and other work
- Salient features:
 - Basic information about survey
 - Rate condition, access, and interest of material
 - Note conservation issues
 - Note special formats
 - Link to accession, resource, or digital object records
 - Format and task independent
 - Highly configurable and flexible application
 - Based on PACSCL methodology

Assessment
✖

Basic Information
Survey
Special Formats & Values

Assessment # : xxxxx

<p>Condition of Material <input type="checkbox"/></p> <p>Physical Access <input type="checkbox"/></p> <p>Quality of Housing <input type="checkbox"/></p> <p>Intellectual Access <input type="checkbox"/></p> <p>Interest <input type="checkbox"/></p> <p>Documentation Quality <input type="checkbox"/></p> <p>Research Value <input type="checkbox"/></p> <p>General note</p> <div style="border: 1px solid gray; height: 150px; width: 100%;"></div> <p>Estimated processing time (EPT)</p> <p>Hours per foot <input type="text"/> Multiplied by total extent <input type="text"/></p> <p>Equals Total EPT <input type="text"/> hours</p>	<p>Special Conservation Issues</p> <p><input type="checkbox"/> Potential mold or mold damage</p> <p><input type="checkbox"/> Recent pest damage</p> <p><input type="checkbox"/> Deteriorating film base</p> <p>Other Conservation Issues</p> <p><input type="checkbox"/> Brittle paper <input type="checkbox"/> Tape</p> <p><input type="checkbox"/> Metal fasteners <input type="checkbox"/> Thermofax paper</p> <p><input type="checkbox"/> Newspaper</p> <p>Conservation note</p> <div style="border: 1px solid gray; height: 150px; width: 100%;"></div>
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First
Previous
Next
Last
Reports
Close
Save

Created: Jan 26, 2009 by anwen | Modified: Jan 26, 2009 by anwen | Record Number: 18

Assessments: Archon AvSAP

- Audio Visual Self Assessment Program
- IMLS-funded project ends 2010
- Format-specific preservation assessment/education Tool
- Prioritize/rank items or groups of items needing preservation or conservation.
- Could possibly generalize to other format types or make into an extension of a general assessment class.
- www.library.illinois.edu/prescons/services/av_self_assesment_program.html



Assessments Manager - Paul's Audio Cassette Test

Quick Search:

- [+ New](#)
- [Save](#)
- [Transfer](#)
- [Delete](#)
- [Cancel](#)
- [Format](#)
- [Glossary](#)
- [Bibliography](#)

- [Browse](#)
- General**
- [Use Information](#)
- [Storage Information](#)
- [Condition](#)
- [Score](#)

What is the name of the item??

What is the name of the collection??

What is the format of this item?

Which of your previously-assessed storage areas houses this item?

What is the level of significance of this item to your repository?? Low Moderate High

Notes

Source

note

Assessments discussion

- How to reconcile two approaches? One or the other? Integrate?
- Ideas for enhancing this area?
- Anything lacking?
- Anything unnecessary?
- Questions?

Work orders

- Proposed functional area indicating and tracking particular archival tasks
- Salient features:
 - Associate to project and / or task type
 - Indicate responsible staff, estimated completion dates and cost or task(s)
 - Indicate actual time and cost of task(s)
 - Indicate vendor's names and quality of work
 - Link to accession, resource, and digital object records
 - Strongly supplements assessment records

at ✕

Administration **Work Orders**

Project Name	Task Category	Task to be Done	Staff Responsible	Deadline
NEH Project		Flatten and mend	Conservator	7/25/2010
NEH Project		Digitize	Digital Projects Coord...	12/15/2010
	Microfilm	Prep originals	Mike	11/20/2009
	Microfilm	Create targets	Archivist	12/10/2009
	Microfilm	Microfilm	Archivist	1/15/2010
	Reference Photocopying	Photocopy	Linda	8/25/2009
Mass History Online Project		Prep originals for scanning	Mike	12/31/2008
Mass History Online Project		Digitize	Digital Projects Coord...	9/1/2009
Mass History Online Project		Digitize	Digital Projects Coord...	9/2/2009
Mass History Online Project		Digitize	Digital Projects Coord...	9/3/2009
	Exhibit at another inst...	On loan	Archivist	12/15/2009
	Exhibit at another inst...	On loan	Archivist	12/15/2009
	Exhibit at another inst...	On loan	Archivist	12/15/2009

Filter:

Work orders discussion

- Ideas for enhancing this area?
- Anything lacking?
- Anything unnecessary?
- Questions?

Web access general features:

- Browse by object type (name, resource, etc.)
- Top-level resource page / finding aid view for child resources.
- Group search results by object type
- Links to related objects
 - e.g. clickable names, subjects, digital objects from resource page
- Theme system: controls look and feel, layout
- Template system: controls specific data elements on page that delivers each object type

Web access user features


- **Public**
 - cart/basket
 - ordering system
 - email repository
 - extensibility to E-commerce features?
- **Staff**
 - Access restricted information
 - Integrated editing links

Archon default w/ relation links

Location: Archon → Faculty and Student Senate → John Philip Sousa Music and...



John Philip Sousa Music and Personal Papers, ca. 1880-ca. 1932 | The Sousa Archives

[Printer-friendly](#) | [Email Us](#)

Title: John Philip Sousa Music and Personal Papers, ca. 1880-ca. 1932 

ID: 04/051

Repository: The Sousa Archives

Created by: Sousa, John Philip (1854-1932) , People Makers Inc. Chris Rishel 

[+ Show Biographical Note](#)

Arrangement: unarranged

Extent: 236.7 Cubic Feet

[View Image Thumbnails](#)

Finding Aid/Inventory
[Series 1: Original Music Manuscripts](#)
[Series 2: Published Music](#)
[Series 3: Ephemera](#)
[Series 4: Photographs & Stuff](#)

Other Note: Pages

[+ Show Subjects](#) (links to similar collections)

[+ Show Forms of Material](#) (links to similar genres)

[+ Show Languages of Materials](#)

[+ Show Administrative Information](#)

[+ Show Unprocessed Materials and Processed Accessions](#)

Editing integration for logged-in staff

Scope and Contents:

Consists of original and published music by, arrangements of western European symphonic music for wind band by Sousa and other musicians, correspondence, newsclippings, photographs, programs and artifacts document the life and career of John Philip Sousa as musician, composer, bandleader, and "March King." The collection of papers is organized into four series: Series 1, Original Music Manuscripts; Series 2, Published Music; Series 3, Ephemera; and Series 4, Photographs.

The original music manuscripts are arranged alphabetically by either composer or arranger and the published music is arranged sequentially by a number that was unique to the original Sousa music catalog. Unidentified and unnumbered music was placed at the end of each grouping of music. Whenever possible an identification of the format of the music for each title (i.e., full score, condensed score, piano score, and parts) has been identified with the corresponding abbreviations, FS, CS, PS, P. The ephemera, consisting of correspondence, newsclippings, programs, and artifacts, is arranged alphabetically by type of material. The photographs are arranged alphabetically by subject.

Of particular interest are the original parts to "Stars and Stripes Forever," correspondence between A. Austin Harding and Sousa, and photographs of Sousa with the Band.

Web access discussion

- Ideas for enhancing this area?
- Anything lacking?
- Anything unnecessary?
- Questions?

Application Functions: Significant user interface properties

- User control area & controls (probably upper left)
- Menu system for access to major app. functions
- Help system/tooltip rollovers
- Content editing area includes:
 - Tabbed interface to group context-specific data elements for each object type (e.g. resource, name, etc.)
 - Drag & drop reordering, transfer, merge, undo, batch edit, global find & replace and transfer, wrap & tag
 - Filtering of long lists of objects
 - Dual-pane relations tabs

Application Functions, Continued

- Customizable:
 - Return screens, search editors, default values, data entry templates, data value lists, etc.
- Unicode compliant
- Support plug ins and reports
- Support data exchange and integration with other systems

Application functions discussion

- Web vs. Client staff interface
 - End-user advantages/disadvantages
 - technical considerations
- Community requests:
 - Command line interface
 - Configurable record requirements
 - Autosave
 - Spell check
- Ideas for enhancing this area?
- Anything lacking?
- Anything unnecessary?
- Questions?

Reports:

- More than 50 default reports supporting administration use of recorded data for most of the functional areas
- Utilize open source report writer such as JasperReports
 - Enable revision of default reports & creation / sharing of new reports

Reports discussion:

- Ideas for enhancing this area?
- Anything lacking?
- Anything unnecessary?
- Questions?

Exports:

- Resources > EAD 2.0 schema, MARCXML, container labels
- Digital objects > METS (MODS / DC, PREMIS rights), MODS, DC, MARCXML
- NAMES > EAC, MADS
- Rights > METS (PREMIS rights), fields within other exports
- Database > SQL append

Exports discussion:

- Ideas for enhancing this area?
- Anything lacking?
- Anything unnecessary?
- Questions?

Imports:

- Accession records < XML, CSV
- Resource records < EAD 2.0 DTD / schema, MARCXML (parent)
- Digital object records < CSV, XML
- Names < EAC, MADS
- Subjects < XML
- Database < Archon / AT SQL migrations

Imports discussion:

- Ideas for enhancing this area?
- Anything lacking?
- Anything unnecessary?
- Questions?

Stylesheets:

- Archival finding aid:
 - HTML < EAD schema export
 - XSL-FO (PDF) < EAD schema export
- Name authority record
 - HTML < EAC export; MADS export
- User created / shared stylesheets

Stylesheets:

- Ideas for enhancing this area?
- Anything lacking?
- Anything unnecessary?
- Questions?

Summary Questions

- What piece of advice would you give to the integration team?
- What features seem most important? Least important?
- What have you learned that concerns you?
- What have you learned that excites you?
- What are your main take-aways?
- What should be the next steps?

Post-Webinar Survey

- We will send you the link to a post-webinar survey in a few days.

Thank you!

Please contact the team with comments & questions:

- Chris Prom:
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<http://www.flickr.com/photos/psd/2086641/>