Survey title:
AT/ Archon HiLevel Requirements
Prioritization  Edit Title

Response Summary

1. Your Name (Optional)
Download
Response Count

Show replies 18
answered question 18
skipped question 8

2. Indicate whether you are an AT user, or Archon user, or use neither.
Create Chart  Download
Response Percent  Response Count

Archivists' Toolkit 46.2%  12
Archon 26.9%  7
Neither 26.9%  7
answered question 26
skipped question 0

3. Type of archive that you represent
Create Chart  Download

Page: Default Section

Total Started Survey: 26
Total Completed Survey: 18 (69.2%)

Logged in as “UCSDLibraries”  Log Off

SurveyMonkey - Survey Results
http://www.surveymonkey.com/MySurvey_Responses.aspx?sm=bNS48q...
### 3. Type of archive that you represent

<table>
<thead>
<tr>
<th>Type</th>
<th>Response Percent</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic</td>
<td>75.0%</td>
<td>18</td>
</tr>
<tr>
<td>Historical society</td>
<td>8.3%</td>
<td>2</td>
</tr>
<tr>
<td>Governmental</td>
<td>8.3%</td>
<td>2</td>
</tr>
<tr>
<td>Business</td>
<td>4.2%</td>
<td>1</td>
</tr>
<tr>
<td>Museum</td>
<td>4.2%</td>
<td>1</td>
</tr>
</tbody>
</table>

**answered question** 24

**skipped question** 2

### 4. How many staff (professionals and paraprofessionals) work at your repository?

<table>
<thead>
<tr>
<th>Number of Staff</th>
<th>Response Percent</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>0.0%</td>
<td>0</td>
</tr>
<tr>
<td>2-3</td>
<td>4.2%</td>
<td>1</td>
</tr>
<tr>
<td>3-6</td>
<td>41.7%</td>
<td>10</td>
</tr>
<tr>
<td>7-10</td>
<td>25.0%</td>
<td>6</td>
</tr>
<tr>
<td>11-20</td>
<td>12.5%</td>
<td>3</td>
</tr>
<tr>
<td>More than 20</td>
<td>16.7%</td>
<td>4</td>
</tr>
</tbody>
</table>

**answered question** 24

**skipped question** 2

Page: Archive Functions

### 5. Rate the following features according to importance:

<table>
<thead>
<tr>
<th>Rating</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Must have</td>
<td>Very useful to me</td>
</tr>
</tbody>
</table>

**answered question**

**skipped question**
5. Rate the following features according to importance:

<table>
<thead>
<tr>
<th>Feature</th>
<th>35.0%</th>
<th>25.0%</th>
<th>40.0%</th>
<th>0.0%</th>
<th>0.0%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repository Information</td>
<td>(7)</td>
<td>(5)</td>
<td>(8)</td>
<td>(0)</td>
<td>(0)</td>
</tr>
<tr>
<td>Repository Statistics</td>
<td>15.0%</td>
<td>45.0%</td>
<td>30.0%</td>
<td>10.0%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

I would like to have these particular features:

1. My role is in the digital library group on campus that would be managing this software for multiple repositories across the University. Features that support lots of different repositories with different administrative users, priorities, etc., would be crucial for this setup.

Mon, Dec 21, 2009 10:09 AM

2. Note: I would consider this useful, but not entirely necessary. We are not sharing the application with others, so having repository info w/in database isn't critical. With stats, I do an annual report, but the format of it is different than what the repository stats module supports. It would be more useful to me if I could include in an exported report several queries based on accessioning and processing data.

Fri, Dec 18, 2009 8:11 AM

3. The ability to maintain the records of multiple repositories (in a consortial model, for example), some of whose members are composed of their own distinct archival units, in a single instance of the new archival management software.

Thu, Dec 17, 2009 6:13 AM

4. Stats would be useful if it could be customized to meet needs of our annual report format. So, many customizable fields and the option to pull in several queries based on accessions and processing data contained within application.

Wed, Dec 16, 2009 7:47 AM

5. Customizable reports

Wed, Dec 16, 2009 7:06 AM

6. The retention of the current options in Archon (contact info, etc.) are essential and the statistical package is highly desirable.

Tue, Dec 15, 2009 2:04 PM

7. We currently have other means of tracking various in-house stats, but I'm sure any features collectively requested by the user community would be of interest and helpful to us in the long run. There is no "Potentially useful" option to check, which would be more accurate, so I've just checked "Useful to me".

Tue, Dec 15, 2009 2:01 PM

8. I would like for the finished product to be able to manage multiple repositories permissions at a granular level. I would like it to provide union catalog support.

Mon, Dec 14, 2009 7:44 PM

9. Need to be able to track amounts (extents) for various formats ... need to address multiple extent statements for Accession Module [not needed in Resource Module].

Mon, Dec 14, 2009 2:38 PM
6.  

<table>
<thead>
<tr>
<th>Rating</th>
<th>Average</th>
<th>I do not understand the feature</th>
<th>Very useful to me</th>
<th>Useful to me</th>
<th>Not useful to me</th>
<th>Must have</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staff user management / information</td>
<td>40.0% (8)</td>
<td>15.0% (3)</td>
<td><strong>40.0% (8)</strong></td>
<td>5.0% (1)</td>
<td>0.0% (0)</td>
<td>2.90</td>
</tr>
<tr>
<td>Public user management / information</td>
<td>10.5% (2)</td>
<td>26.3% (5)</td>
<td><strong>47.4% (9)</strong></td>
<td>10.5% (2)</td>
<td>5.3% (1)</td>
<td>2.26</td>
</tr>
</tbody>
</table>

I would like to have these particular features:

1. It's hard to say re: public user mgmt since we don't currently have this feature in AT. I think it will be very useful when there is web access for the public. Re: staff, I would very much like to have more auditing in the database so I can keep track of who entered what records. I would also like to be able to retire a user record, or otherwise give a staff member no write access (in the case of an employee leaving, for example).

Fri, Dec 18, 2009 8:11 AM

2. Interoperability with third-party systems such as Aeon (although it would also be nice if the Public User management feature were rich enough to replace the need for products like Aeon).

Thu, Dec 17, 2009 6:13 AM

3. A "Read Only" permissions level would be useful.

Wed, Dec 16, 2009 8:33 AM

4. Compatibility with other applications (e.g. Aeon or reference module plugins)

Wed, Dec 16, 2009 7:06 AM

5. See features currently available. No additional feature requests at this time.

Tue, Dec 15, 2009 2:04 PM

6. It will be essential to control permissions and block certain data fields from the public and perhaps certain in-house users.

Tue, Dec 15, 2009 2:01 PM

7. We don't track our staff that way and I don't really see a great need for it. Might be useful for tracking Curatorial changes?? The Public user mgmt might be a nice way to do away with a separate User Registration and billing database... but is not a high priority right now.

Mon, Dec 14, 2009 2:38 PM
7. **Create Chart**

<table>
<thead>
<tr>
<th>Feature</th>
<th>Must have</th>
<th>Very useful to me</th>
<th>Useful to me</th>
<th>Not useful to me</th>
<th>I do not understand the feature</th>
<th>Rating</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collection management</td>
<td>47.4%</td>
<td>21.1%</td>
<td>21.1%</td>
<td>5.3%</td>
<td>5.3%</td>
<td>3.00</td>
<td></td>
</tr>
</tbody>
</table>

I would like to have these particular features:


2. I am still a bit unclear about what this will really encompass. It could be very useful depending on what data gets put here. Fri, Dec 18, 2009 8:11 AM

3. GENERAL COMMENT: I see this feature ("collection management") as a low priority for the initial functional requirements of integrated AT/Archon -- and advocate keeping the "accession-type" process tracking with that module. Perhaps this could be developed as a later plug-in or in a future version? Thu, Dec 17, 2009 9:46 AM

4. Acquisitions and processing materials workflow features are desirable, but not required. Tue, Dec 15, 2009 2:04 PM

5. We currently have other means of tracking collection mgt. info, but I'm sure any features collectively requested by the user community would be of interest and helpful to us in the long run. There is no "Potentially useful" option to check, which would be more accurate, so I've just checked "Useful to me". Tue, Dec 15, 2009 2:01 PM

6. Multiple extent statements for Accessions Module Purchase price of a collection/item added into Accessions Module Mon, Dec 14, 2009 2:38 PM

8. **Create Chart**

<table>
<thead>
<tr>
<th>Feature</th>
<th>Must have</th>
<th>Very useful to me</th>
<th>Useful to me</th>
<th>Not useful to me</th>
<th>I do not understand the feature</th>
<th>Rating</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessments (General)</td>
<td>10.5%</td>
<td>42.1%</td>
<td>42.1%</td>
<td>5.3%</td>
<td>0.0%</td>
<td>2.58</td>
<td></td>
</tr>
</tbody>
</table>

I would like to have these particular features:

1. We'd probably use other tools (not integrated with this one) for this Mon, Dec 21, 2009 10:09 AM

   answered question

   skipped question
1. We'd definitely use the a/v assessment tool developed on this campus instead of anything that came with this tool.

Fri, Dec 18, 2009 8:15 AM

2. Ability to note conservation need and when conservation work has been performed

Thu, Dec 17, 2009 9:46 AM

3. A lower priority for the intergrated product.

Tue, Dec 15, 2009 2:04 PM

4. As in the case of the collection management features, this would be very useful for our repository as it would allow us to combine external databases/tracking that we currently maintain concurrently alongside archon, but it is not a core requirement for integration launch.

Tue, Dec 15, 2009 2:01 PM

5. We currently have other means of assessing collections and their needs, but I'm sure any features collectively requested by the user community would be of interest and helpful to us in the long run. (We did experiment long ago with a numerical appraisal matrix, and found it cumbersome and not all that accurate in its final rankings, and so did not proceed with a numerical assessment system.) There is no "Potentially useful, but with reservations" option to check, which would be more accurate, so I've just checked "Useful to me".

Mon, Dec 14, 2009 2:38 PM

6. Need to be able to either 1) give a title to a survey (group of collections) or 2) link to a location or both. We would use the assessments / survey to track work needed and cost of doing that work by either project or Location. We currently have 6 storage locations - 2 of which are commercial.

Mon, Dec 14, 2009 2:38 PM

We'd definitely use the a/v assessment tool developed on this campus instead of anything that came with this tool.

Mon, Dec 21, 2009 10:09 AM

<table>
<thead>
<tr>
<th>Must have to me</th>
<th>Very useful to me</th>
<th>Useful to me</th>
<th>Not useful to me</th>
<th>I do not understand the feature</th>
<th>Rating Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessments (Audio-visual)</td>
<td>5.3% (1)</td>
<td>31.6% (6)</td>
<td>42.1% (8)</td>
<td>21.1% (4)</td>
<td>0.0% (0)</td>
</tr>
</tbody>
</table>

I would like to have these particular features:

- Assessments (Audio-visual)
- Ability to note conservation need and when conservation work has been performed
- A lower priority for the integrated product
- As in the case of the collection management features, this would be very useful for our repository as it would allow us to combine external databases/tracking that we currently maintain concurrently alongside archon, but it is not a core requirement for integration launch.
- We currently have other means of assessing collections and their needs, but I'm sure any features collectively requested by the user community would be of interest and helpful to us in the long run. (We did experiment long ago with a numerical appraisal matrix, and found it cumbersome and not all that accurate in its final rankings, and so did not proceed with a numerical assessment system.) There is no "Potentially useful, but with reservations" option to check, which would be more accurate, so I've just checked "Useful to me".
- Need to be able to either 1) give a title to a survey (group of collections) or 2) link to a location or both. We would use the assessments / survey to track work needed and cost of doing that work by either project or Location. We currently have 6 storage locations - 2 of which are commercial.
9. It's a good feature but we have very little in the way of a/v holdings. Fri, Dec 18, 2009 8:15 AM

3. Also a lower priority for the integrated product. Thu, Dec 17, 2009 9:46 AM

4. See above comment. Tue, Dec 15, 2009 2:04 PM

5. See comment above for general Assessments. There is no "Potentially useful" option to check, which would be more accurate, so I've just checked "Useful to me". Tue, Dec 15, 2009 2:01 PM

6. I think this would be a nice addition but would need to spec out with our a/v archivist and preservationist. Mon, Dec 14, 2009 2:38 PM

**answered question**

**skipped question**

---

10. We'd probably need a larger solution not limited to collections managed by this tool. Mon, Dec 21, 2009 10:09 AM

2. As it was described this wouldn't be particularly useful to me. It would be more useful if it was tied to use of the collection (call slips and permission to publish requests). Fri, Dec 18, 2009 8:11 AM

3. I think this function goes beyond the scope of the core functionality of AT/Archon ... and would be better suited for development as a separate application with AT/Archon could "coordinate". I see possible ILS scope-creep here ... Thu, Dec 17, 2009 9:46 AM

4. Compatibility with other applications (e.g. Aeon) Wed, Dec 16, 2009 7:06 AM

5. See above comment: this would be very useful for our repository as it would allow us to combine external databases/tracking that we currently maintain concurrently alongside archon, but it is not a core requirement for integration launch. Tue, Dec 15, 2009 2:04 PM

**answered question**

**skipped question**
10. It sounds like this category could encompass a wide range of functions, but some are a little hard to imagine without seeing examples in action. There is no "Potentially useful" option to check, which would be more accurate, so I've just checked "Useful to me".

7. I don't think we'd work this way ... not sure if it's worth the development time.

11. I would like to have these particular features:

<table>
<thead>
<tr>
<th>Must have</th>
<th>Very useful to me</th>
<th>Useful to me</th>
<th>Not useful to me</th>
<th>I do not understand the feature</th>
<th>Rating</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location / space management</td>
<td>47.4% (9)</td>
<td>10.5% (2)</td>
<td>36.8% (7)</td>
<td>5.3% (1)</td>
<td>0.0% (0)</td>
<td>3.00</td>
</tr>
</tbody>
</table>

1. Repository-specific location lists.

2. Two important features for "location/space management": 1) Any given element (top level resource or even a bottom-level component) can have multiple locations (that are not necessarily a range) ... such as boxes 1 and 5. 2) Any given "location" can house multiple collections. Another important point that was made in the webinar was distinguishing between "containers" and "locations".

3. The ability to easily attach barcodes to records at various levels (series, container, item, etc.) would be particularly useful to us. The calculation of volume and location of empty space would also be very helpful.

4. This area needs to be more robust and more flexible ... perhaps an oxymoron. We currently have no plans to move our location data into AT as we don't see an easy way to do so. Many of our legacy collections have multiple boxes with the same number only differentiated by different Series.
<table>
<thead>
<tr>
<th>12.</th>
<th>Accession management</th>
<th>Must have</th>
<th>Very useful to me</th>
<th>Useful to me</th>
<th>Not useful to me</th>
<th>I do not understand the feature</th>
<th>Rating Average</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>68.4% (13)</td>
<td>21.1% (4)</td>
<td>10.5% (2)</td>
<td>0.0% (0)</td>
<td>0.0% (0)</td>
<td></td>
<td>3.58</td>
</tr>
</tbody>
</table>

I would like to have these particular features:

1. **ability to generate thank you letters and/or deeds of gift; ability to accommodate multiple iterations of numbering systems (some alpha numeric)**  
   Fri, Dec 18, 2009 8:15 AM

2. **Retention periods and destruction dates would be desirable, but not required.**  
   Tue, Dec 15, 2009 2:04 PM

3. **We often get govt. records in via a records schedule, which may contain cryptic or non-descriptive series titles. An alternate title field would be helpful for keeping track of these when our formal processed title differs. Also, allow for copious note fields in which to document accessioning oddities.**  
   Tue, Dec 15, 2009 2:01 PM

4. **This is the main reason we moved to AT along with EAD creation. I would reiterate what I said in #7:**
   - Multiple extent statements for Accessions Module
   - Purchase price of a collection/item added into Accessions Module  
   Mon, Dec 14, 2009 2:38 PM

<table>
<thead>
<tr>
<th>13.</th>
<th>Resource description</th>
<th>Must have</th>
<th>Very useful to me</th>
<th>Useful to me</th>
<th>Not useful to me</th>
<th>I do not understand the feature</th>
<th>Rating Average</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>89.5% (17)</td>
<td>10.5% (2)</td>
<td>0.0% (0)</td>
<td>0.0% (0)</td>
<td>0.0% (0)</td>
<td></td>
<td>3.89</td>
</tr>
</tbody>
</table>

I would like to have these particular features:

1. **User-defined fields**  
   Wed, Dec 16, 2009 7:06 AM

2. **Must retain current features.**  
   Tue, Dec 15, 2009 2:04 PM

answered question

skipped question
13.

3. Obviously of primary interest. Of particular value will be easily customizable options for using controlled vocabulary lists (whether standard thesauri of terms, or simply a way to minimize staff errors by forcing a choice of standard values rather than allowing the risk of typos). Form of material, unit of measurement, ways of expressing dates, types of restrictions are fields that immediately come to mind.

4. Currently there are issues with PDF output and EAD output to the Online Archive of California but we have developed work arounds for the latter.

14.

<table>
<thead>
<tr>
<th>Must have</th>
<th>Very useful to me</th>
<th>Useful to me</th>
<th>Not useful to me</th>
<th>I do not understand the feature</th>
<th>Rating Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Useless to me</td>
<td>52.6% (10)</td>
<td>26.3% (5)</td>
<td>10.5% (2)</td>
<td>10.5% (2)</td>
<td>0.0% (0)</td>
</tr>
</tbody>
</table>

I would like to have these particular features:

1. Ability to link lots of digital items to a file-level description.
2. In addition to the features already in Archon, links to image use fees and permission to use forms; a "sort title" field for titles of digital objects.
3. Interoperability with CONTENTdm and other digital library software platforms.
4. * Would be really useful to include a module for creating and managing (e.g., search/browse, view, edit, etc.) digital objects, independent of archival collection/resource records -- if digital object management will be a priority for the integrated application.
5. Premis technical metadata
6. The ability to link to digital images from different levels of description would be great, and the lack of limits on the number of images that can be linked to is also of value to us, since those series that we do have digitized and web-available have contain numbers of images.
14. 

7. I wouldn't do further development here. I don't see it worth dumping a lot more time into; leave it to others to develop external plug-ins. We have not been able to test this area in-depth... but you've added bulk import/export which was most important. Whatever was here we would need to be able to fit into our current and future digitization and born-digital work flows.

answered question
skipped question

15. 

<table>
<thead>
<tr>
<th>Rights description</th>
<th>Must have</th>
<th>Very useful to me</th>
<th>Useful to me</th>
<th>Not useful to me</th>
<th>I do not understand the feature</th>
<th>Rating Average</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>10.5%</td>
<td>42.1%</td>
<td>47.4%</td>
<td>0.0%</td>
<td>0.0% (0)</td>
<td>2.63</td>
</tr>
</tbody>
</table>

I would like to have these particular features:

1. Addition of forms and fee schedules, possible link to external payment system
Fri, Dec 18, 2009 8:15 AM

2. Lower priority for initial work on the integrated AT/Archon system.
Thu, Dec 17, 2009 9:46 AM

3. * Suggest including fields that map to PREMIS rights metadata elements (for digital object exports)
Wed, Dec 16, 2009 7:55 PM

4. This is not a priority for initial integrated system.
Tue, Dec 15, 2009 2:04 PM

5. This is something we do not adequately address in our web-based finding aids, and would be helpful for users to see attached to individual resource descriptions. Again, it would be helpful to allow for controlled vocabulary use by staff, since the same statement or restriction category will apply to many different series.
Tue, Dec 15, 2009 2:01 PM

6. You already have some rights mgmt ... We have a need to track those collections that we've secured digital rights for.
Mon, Dec 14, 2009 2:38 PM

answered question
skipped question

16. 

Create Chart

16. **Create Chart**

Name management

<table>
<thead>
<tr>
<th>Must have</th>
<th>Very useful to me</th>
<th>Useful to me</th>
<th>Not useful to me</th>
<th>I do not understand the feature</th>
<th>Rating Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>61.1% (11)</td>
<td>33.3% (6)</td>
<td>5.6% (1)</td>
<td>0.0% (0)</td>
<td>0.0% (0)</td>
<td>3.56</td>
</tr>
</tbody>
</table>

I would like to have these particular features:

1. **EAC support.**
   Mon, Dec 21, 2009 10:09 AM

2. Preferably the ability to comply with EAC; ability to add more than one person w/ the same name who has different dates without adding a "II" or "Jr"
   Fri, Dec 18, 2009 8:15 AM

3. Work out bugs of EAD import to remove names as subjects and put properly in subjects.
   Wed, Dec 16, 2009 7:06 AM

4. The wide variety of MARC components, while useful, are not required. Again, maintaining basic fields as currently available in Archon is sufficient.
   Tue, Dec 15, 2009 2:04 PM

5. Would be nice to be able to customize different browse displays of these name authority entries, so that we can control the order in which they appear. Strict alphabetical order is often not helpful (and sometimes downright obfuscating!) in conveying the structure of a collection's subunits, or even in giving an overview of all collections of a particular type. Allow us to do customizable displays by a value such as RG number, or other internally assigned numbers for subunits.
   Tue, Dec 15, 2009 2:01 PM

6. Not sure what more you need here other than ability to see and search alternative names.
   Mon, Dec 14, 2009 2:38 PM

   - answered question
   - skipped question

17. **Create Chart**

Subject management

<table>
<thead>
<tr>
<th>Must have</th>
<th>Very useful to me</th>
<th>Useful to me</th>
<th>Not useful to me</th>
<th>I do not understand the feature</th>
<th>Rating Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>52.6% (10)</td>
<td>36.8% (7)</td>
<td>5.3% (1)</td>
<td>5.3% (1)</td>
<td>0.0% (0)</td>
<td>3.37</td>
</tr>
</tbody>
</table>

I would like to have these particular features:

- answered question
- skipped question
1. Work out bugs of EAD import to remove names as subjects and put properly in subjects. Wed, Dec 16, 2009 7:06 AM

2. We continue to find that the enablement of "every-word-searching" via Google and other internet browsers is by far the most useful tool in connecting users to our holdings, and that government records often do not lend themselves to being pigeon-holed into subject term categories. There are just too many subjects dealt with in, say, an agency's "Administrative File" for such categorization to be meaningful. But certainly for smaller institutions with smaller collections, the library-style usage of standard subject terms would be helpful. Tue, Dec 15, 2009 2:01 PM

3. Some repositories use LCSH for subject data. Since the LOC is giving away subject headings in RDF (at a whopping 350+ MB) now, why not find a way to incorporate that data seamlessly for this system. It could be the base, but their could be facilities for adding other data. Mon, Dec 14, 2009 7:44 PM

---

Deaccession management 21.1% (4) Very useful to me 36.8% (7) Useful to me 42.1% (8) Not useful to me 0.0% (0) I do not understand the feature 0.0% (0) Rating Average 2.79

Hide replies I would like to have these particular features:

1. Create separate module (ala Accessions, Resources...) for deaccessions. Wed, Dec 16, 2009 7:06 AM

2. This would be useful for us institutional archives, but it is possible to work around in Archon using the currently available fields. Tue, Dec 15, 2009 2:04 PM

3. Being able to retain hidden data about deaccessioned collections is an excellent idea, and behooves us as keepers of history - i.e. keeping a history of our own actions as well as that of others. Tue, Dec 15, 2009 2:01 PM

4. Would be helpful to de-acn entire collections and still see work that we've created but once again do not think in any way this should be a priority now. Mon, Dec 14, 2009 2:38 PM
18. .

answered question

skipped question

19. Please identify any other archive functions not in the list above that you think should be supported in the integrated application:

Response Count

Show replies 5

answered question 5

skipped question 21

Page: Import functions / types

20. Accession record(s)

<table>
<thead>
<tr>
<th>Must have</th>
<th>Very useful to me</th>
<th>Useful to me</th>
<th>Not useful to me</th>
<th>I do not understand the feature</th>
<th>Rating Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>XML</td>
<td>35.3% (6)</td>
<td>11.8% (2)</td>
<td>17.6% (3)</td>
<td>29.4% (5)</td>
<td>2.41</td>
</tr>
<tr>
<td>Comma separated values</td>
<td>44.4% (8)</td>
<td>27.8% (5)</td>
<td>5.6% (1)</td>
<td>16.7% (3)</td>
<td>2.89</td>
</tr>
</tbody>
</table>

Hide replies  I would like to suggest these other imports for this area:

1. While the XML import wouldn't be useful to me at this repository, I think it would be very useful to many archivists and should be included.

Fri, Dec 18, 2009 8:18 AM

2. Error log indicates accession numbers of records not imported rather than number of record, which is meaningless in large imports.

Wed, Dec 16, 2009 7:10 AM

3. The easy importability of simple, standard comma separated value format would be helpful for ALL fields, not just those associated with accessions. It allows options for those grandfathering data in from unique or obscure systems.

Tue, Dec 15, 2009 2:15 PM

4. although we've already done all our imports EXCEPT location data.

Mon, Dec 14, 2009 2:45 PM

answered question

skipped question
### 20. Accession record(s)

<table>
<thead>
<tr>
<th></th>
<th>Must have</th>
<th>Very useful to me</th>
<th>Useful to me</th>
<th>Not useful to me</th>
<th>I do not understand the feature</th>
<th>Rating Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>EAD</td>
<td>84.2% (16)</td>
<td>5.3% (1)</td>
<td>0.0% (0)</td>
<td>10.5% (2)</td>
<td>0.0% (0)</td>
<td>3.63</td>
</tr>
<tr>
<td>MARCXML</td>
<td>35.3% (6)</td>
<td>23.5% (4)</td>
<td>29.4% (5)</td>
<td>11.8% (2)</td>
<td>0.0% (0)</td>
<td>2.82</td>
</tr>
</tbody>
</table>

Hide replies  I would like to suggest these other imports for this area:

1. MODS, maybe? QDC or simple DC?  
   Mon, Dec 21, 2009 10:10 AM

2. Batch import of MARCXML, including for other than collection-level records. I would like to do folder level MARC imports in particular based on past practices here.  
   Fri, Dec 18, 2009 8:18 AM

3. A better EAD importer than Archon's current one would be great.  
   Thu, Dec 17, 2009 6:41 AM

4. * Suggest support for importing resource record information that isn't necessarily in EAD or MARCXML formats, e.g., support for a tab-delimited format, where users can specify mappings to internal fields. Limiting to EAD and MARCXML seems to require a lot of pre-processing of legacy descriptions not in those formats, for users to migrate "core" or minimal records into the AT.  
   Wed, Dec 16, 2009 8:11 PM

5. Batch loading of MARCXML  
   Wed, Dec 16, 2009 3:21 PM

6. The easy importability of simple, standard comma separated value format would be helpful for ALL fields, not just those associated with accessions. It allows options for those grandfathering data in from unique or obscure systems. For example, we are in the process of using global search-and-replace operations to convert much of our current, standard html webpage data into CSV, and from there into Access or Excel tables. It is in this form that we plan to batch-import the information into the appropriate fields of the current Archon package (with the help of our IT department).  
   Tue, Dec 15, 2009 2:15 PM

7. MODS, CSV  
   Mon, Dec 14, 2009 2:54 PM

8. AT already does EAD and I'm not sure that MARCXML would be used by us at this time.  
   Mon, Dec 14, 2009 2:45 PM

answered question

skipped question
21. Resource record(s)

22. Digital record(s)

<table>
<thead>
<tr>
<th></th>
<th>Must have</th>
<th>Very useful to me</th>
<th>Useful to me</th>
<th>Not useful to me</th>
<th>I do not understand the feature</th>
<th>Rating Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>XML</td>
<td>50.0% (9)</td>
<td>22.2% (4)</td>
<td>11.1% (2)</td>
<td>11.1% (2)</td>
<td>5.6% (1)</td>
<td>3.00</td>
</tr>
<tr>
<td>Comma separated values</td>
<td>27.8% (5)</td>
<td>38.9% (7)</td>
<td>16.7% (3)</td>
<td>5.6% (1)</td>
<td>11.1% (2)</td>
<td>2.67</td>
</tr>
</tbody>
</table>

23. Name record(s)

<table>
<thead>
<tr>
<th></th>
<th>Must have</th>
<th>Very useful to me</th>
<th>Useful to me</th>
<th>Not useful to me</th>
<th>I do not understand the feature</th>
<th>Rating Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>EAC</td>
<td>29.4% (5)</td>
<td>35.3% (6)</td>
<td>5.9% (1)</td>
<td>17.6% (3)</td>
<td>11.8% (2)</td>
<td>2.53</td>
</tr>
<tr>
<td>MADS</td>
<td>0.0% (0)</td>
<td>13.3% (2)</td>
<td>33.3% (5)</td>
<td>40.0% (6)</td>
<td>13.3% (2)</td>
<td>1.47</td>
</tr>
<tr>
<td>Comma separated values</td>
<td>29.4% (5)</td>
<td>17.6% (3)</td>
<td>29.4% (5)</td>
<td>17.6% (3)</td>
<td>5.9% (1)</td>
<td>2.47</td>
</tr>
<tr>
<td>From MARCXML (headings only)</td>
<td>18.8% (3)</td>
<td>37.5% (6)</td>
<td>25.0% (4)</td>
<td>12.5% (2)</td>
<td>6.3% (1)</td>
<td>2.50</td>
</tr>
</tbody>
</table>
23. Name record(s)

I would like to suggest these other imports for this area:

1. I'm lukewarm about MADS. We haven't implemented it yet here, but it might be useful.
   Mon, Dec 21, 2009 10:10 AM

2. Like with question 20 above, we don't have EAC or MADS to import so this wouldn't be useful to me currently. However, I think both would be very useful to others and in the future, so should be included.
   Fri, Dec 18, 2009 8:18 AM

3. MARCXML authority records
   Mon, Dec 14, 2009 2:54 PM

4. MADS - not sure about this one; MARCXML might be useful to bring in authorized headings - perhaps. EAC - would be useful but only if a nat'l listing existed. We do not have time/resources now to develop an in-house maintained authority for Names.
   Mon, Dec 14, 2009 2:45 PM

24. Subject record(s)

<table>
<thead>
<tr>
<th></th>
<th>Must have</th>
<th>Very useful to me</th>
<th>Useful to me</th>
<th>Not useful to me</th>
<th>I do not understand the feature</th>
<th>Rating</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>XML</td>
<td>33.3%</td>
<td>22.2%</td>
<td>27.8%</td>
<td>5.6%</td>
<td>11.1%</td>
<td>2.61</td>
<td></td>
</tr>
<tr>
<td>Comma separated values</td>
<td>27.8%</td>
<td>22.2%</td>
<td>33.3%</td>
<td>11.1%</td>
<td>5.6%</td>
<td>2.56</td>
<td></td>
</tr>
<tr>
<td>From MARCXML (headings only)</td>
<td>18.8%</td>
<td>37.5%</td>
<td>37.5%</td>
<td>0.0%</td>
<td>6.3%</td>
<td>2.63</td>
<td></td>
</tr>
</tbody>
</table>

I would like to suggest these other imports for this area:

1. Again, don't have XML now to import, but I think this would be very useful in the future.
   Fri, Dec 18, 2009 8:18 AM

2. Again, find some way of incorporating the freely available LCSH data
   Mon, Dec 14, 2009 7:47 PM

3. MARCXML authority records; RDF vocabulary schemas such as SKOS
   Mon, Dec 14, 2009 2:54 PM

4. same as above; not sure about XML worth.
   Mon, Dec 14, 2009 2:45 PM
24. Subject record(s)

Create Chart

answered question

skipped question

25. Location record(s)

Create Chart

Must have

Very useful to me

Useful to me

Not useful to me

I do not understand the feature

Rating

Average

Comma separated values

31.6% (6)

21.1% (4)

15.8% (3)

21.1% (4)

10.5% (2)

2.42

Hide replies I would like to suggest these other imports for this area:

1. Would not work with existing architecture of Locations or Manage Locations

answered question

skipped question

26. Legacy AT / Archon database

Create Chart

Must have

Very useful to me

Useful to me

Not useful to me

I do not understand the feature

Rating

Average

Comprehensive data migration

94.7% (18)

0.0% (0)

0.0% (0)

5.3% (1)

0.0% (0)

3.84

Hide replies I would like to suggest these other imports for this area:

1. The ability to migrate our current instance of the AT completely into the new system is an absolute must for us if we were going to adopt the integrated product.

answered question

skipped question

2. direct CSV importability wouldn't hurt either - it is what we would want to use if the merged product is ready before our IT staff is able to reconcile their server, firewall and compatibility issues with the current version of Archon.

3. There needs to be a clear mapping strategy between existing AT d.b. and the new merged d.b. Funds for extensive clean-up post

answered question

skipped question
26. Legacy AT / Archon database

migration would not be forthcoming in the current climate.

answered question

27. Please identify any other import products that are important to you:

Response Count

Show replies 4

answered question 4

skipped question 22

Page: Export Functions / Types

28. Resource description(s)

<table>
<thead>
<tr>
<th>Resource</th>
<th>Must have</th>
<th>Very useful to me</th>
<th>Useful to me</th>
<th>Not useful to me</th>
<th>I do not understand the feature</th>
<th>Rating Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>EAD</td>
<td>84.2%</td>
<td>5.3%</td>
<td>10.5%</td>
<td>0.0%</td>
<td>0.0% (0)</td>
<td>3.74</td>
</tr>
<tr>
<td></td>
<td>(16)</td>
<td>(1)</td>
<td>(2)</td>
<td>(0)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MARCXML (parent record)</td>
<td>52.9%</td>
<td>23.5%</td>
<td>17.6%</td>
<td>5.9%</td>
<td>0.0% (0)</td>
<td>3.24</td>
</tr>
<tr>
<td></td>
<td>(9)</td>
<td>(4)</td>
<td>(3)</td>
<td>(1)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Container labels</td>
<td>33.3%</td>
<td>27.8%</td>
<td>38.9%</td>
<td>0.0%</td>
<td>0.0% (0)</td>
<td>2.94</td>
</tr>
<tr>
<td></td>
<td>(6)</td>
<td>(5)</td>
<td>(7)</td>
<td>(0)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Folder labels</td>
<td>22.2%</td>
<td>11.1%</td>
<td>50.0%</td>
<td>16.7%</td>
<td>0.0% (0)</td>
<td>2.39</td>
</tr>
<tr>
<td></td>
<td>(4)</td>
<td>(2)</td>
<td>(9)</td>
<td>(3)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Hide replies I would like to suggest these other exports for this area:

1. An EAD preview function would be useful. I realize this might be rather redundant though (if the EAD is being produced, why not just export it?) Wed, Dec 16, 2009 8:40 AM

answered question

skipped question
28. Resource description(s)

2. Container labels MIGHT be useful; folder labels definitely not!

Mon, Dec 14, 2009 2:48 PM

answered question

skipped question

29. Digital object description(s)

<table>
<thead>
<tr>
<th>Format</th>
<th>Must have</th>
<th>Very useful to me</th>
<th>Useful to me</th>
<th>Not useful to me</th>
<th>I do not understand the feature</th>
<th>Rating Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dublin Core</td>
<td>42.1%</td>
<td>26.3%</td>
<td>21.1%</td>
<td>10.5%</td>
<td>0.0% (0)</td>
<td>3.00</td>
</tr>
<tr>
<td>MARCXML</td>
<td>18.8%</td>
<td>43.8%</td>
<td>18.8%</td>
<td>18.8%</td>
<td>0.0% (0)</td>
<td>2.63</td>
</tr>
<tr>
<td>MODS</td>
<td>31.3%</td>
<td>31.3%</td>
<td>25.0%</td>
<td>12.5%</td>
<td>0.0% (0)</td>
<td>2.81</td>
</tr>
<tr>
<td>METS w/ MODS</td>
<td>23.5%</td>
<td>17.6%</td>
<td>47.1%</td>
<td>11.8%</td>
<td>0.0% (0)</td>
<td>2.53</td>
</tr>
<tr>
<td>METS w/ DC</td>
<td>29.4%</td>
<td>11.8%</td>
<td>47.1%</td>
<td>11.8%</td>
<td>0.0% (0)</td>
<td>2.59</td>
</tr>
<tr>
<td>PREMIS rights md</td>
<td>6.3%</td>
<td>31.3%</td>
<td>31.3%</td>
<td>25.0%</td>
<td>6.3% (1)</td>
<td>2.06</td>
</tr>
<tr>
<td>PREMIS technical md</td>
<td>6.3%</td>
<td>25.0%</td>
<td>37.5%</td>
<td>25.0%</td>
<td>6.3% (1)</td>
<td>2.00</td>
</tr>
</tbody>
</table>

I would like to suggest these other exports for this area:

1. PREMIS is a good idea, we just haven't implemented it yet here. Mon, Dec 21, 2009 10:11 AM

2. We don't use these at this time but may in the future. Fri, Dec 18, 2009 8:18 AM

3. We are heading away from use of METS files not sure about PREMIS currently Mon, Dec 14, 2009 2:48 PM
30. Name description(s)

<table>
<thead>
<tr>
<th>Must have</th>
<th>Very useful to me</th>
<th>Useful to me</th>
<th>Not useful to me</th>
<th>I do not understand the feature</th>
<th>Rating Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>EAC</td>
<td>33.3%</td>
<td>27.8%</td>
<td>22.2%</td>
<td>5.6%</td>
<td>2.67</td>
</tr>
<tr>
<td></td>
<td>(6)</td>
<td>(5)</td>
<td>(4)</td>
<td>(1)</td>
<td></td>
</tr>
<tr>
<td>MADS</td>
<td>18.8%</td>
<td>6.3%</td>
<td>37.5%</td>
<td>25.0%</td>
<td>1.94</td>
</tr>
<tr>
<td></td>
<td>(3)</td>
<td>(1)</td>
<td>(6)</td>
<td>(4)</td>
<td></td>
</tr>
</tbody>
</table>

Hide replies

I would like to suggest these other exports for this area:

1. * As many of us are moving towards investigating how to implement EAC-CPF, it'd be great to see the application support export of EAC-CPF record exports -- and as mentioned on the call, dynamic linkages to EAC-CPF records in external repositories.  

   Wed, Dec 16, 2009 8:16 PM

2. Sorry - have not had enough time to look into this.  

   Mon, Dec 14, 2009 2:48 PM

   answered question

   skipped question
30. Name description(s)

31. Please identify any other export product(s) that are important to you:

1. Batch exporting of EAD and MARC records, either by entire repository or by flagging certain records for export. For example, it would be useful to flag those records considered complete enough to contribute to a union database of EAD records and export them in bulk.

2. * Suggest auditing outputs against RLG's high-level EAD encoding recommendations. Many of us are leveraging these specs (OAC and NWDA, for example). Some elements and attributes are lacking from AT outputs in particular -- a few minor tweaks to the outputs could address many of the issues we've identified, e.g., missing <unitid>REPOSITORYCODE attribute, <dsc> TYPE attribute, etc.
   * Support *both* EAD schema- and DTD-based flavors of exports.
   * Suggest incorporating functionality to allow users to modify particular some default tag or attribute values in EAD exports (and also perhaps METS exports) -- e.g., in the case of AT outputs in particular, providing an option to specify EAD <head>ing values and LABEL attribute values
   * Suggest incorporating functionality to allow users to specify default encoding order for <c0x><did> elements in the container list, such as <unitid>, <unittitle>, <unitdate>. We realize that this could be accommodated by display stylesheets. In the case of the OAC, however, we have a standardized display across all finding aids. Ideally, we could support multiple stylesheets and allow contributors to specify which ones they'd like to use -- but currently, the source encoding order of elements are directly reflected in our display.

3. EAF

SurveyMonkey - Survey Results
http://www.surveymonkey.com/MySurvey_Responses.aspx?sm=bNS48q...
31. Please identify any other export product(s) that are important to you:

4. I think a CSV exporter like Archon's CSV could be helpful. I can do that kind of thing directly from the database, but I prefer just pushing a button.

answered question 4
skipped question 22

Page: General User and Programming Interface

32. My repository prefers to use a web interface for creating and editing data.

<table>
<thead>
<tr>
<th>Response</th>
<th>Percent</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>13.3%</td>
<td>2</td>
</tr>
<tr>
<td>Yes</td>
<td>86.7%</td>
<td>13</td>
</tr>
</tbody>
</table>

answered question 15
skipped question 11

33. My repository prefers to use a client application for creating / editing data.

<table>
<thead>
<tr>
<th>Response</th>
<th>Percent</th>
<th>Count</th>
</tr>
</thead>
<tbody>
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<td>12</td>
</tr>
<tr>
<td>Yes</td>
<td>20.0%</td>
<td>3</td>
</tr>
</tbody>
</table>

answered question 15
skipped question 11

34. My repository prefers an user interface that is

<table>
<thead>
<tr>
<th>Response</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>answered question</td>
<td>16</td>
</tr>
<tr>
<td>skipped question</td>
<td>10</td>
</tr>
</tbody>
</table>
### 34. My repository prefers an user interface that is

<table>
<thead>
<tr>
<th>Option</th>
<th>Response Count</th>
<th>Response Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>More configurable</td>
<td>14</td>
<td>87.5%</td>
</tr>
<tr>
<td>Less configurable</td>
<td>2</td>
<td>12.5%</td>
</tr>
</tbody>
</table>

**answered question** 16
**skipped question** 10

### 35. My repository prefers a reports engine that is

<table>
<thead>
<tr>
<th>Option</th>
<th>Response Count</th>
<th>Response Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Graphical</td>
<td>12</td>
<td>92.3%</td>
</tr>
<tr>
<td>Non-graphical</td>
<td>1</td>
<td>7.7%</td>
</tr>
</tbody>
</table>

**answered question** 13
**skipped question** 13

### 36. My repository prefers an application system that

<table>
<thead>
<tr>
<th>Option</th>
<th>Response Count</th>
<th>Response Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stores and manages metadata and digital objects</td>
<td>8</td>
<td>50.0%</td>
</tr>
<tr>
<td>Stores and manages only metadata and interacts with a separate digital object repository</td>
<td>8</td>
<td>50.0%</td>
</tr>
</tbody>
</table>

**answered question** 16
**skipped question** 10

### 37. My repository prefers an application that supports

<table>
<thead>
<tr>
<th>Option</th>
<th>Response Count</th>
<th>Response Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Simple rendering attributes within fields (e.g. bold, underline, etc.)</td>
<td>6</td>
<td>37.5%</td>
</tr>
<tr>
<td>Full encoding of semantic elements within fields (e.g.</td>
<td>10</td>
<td>62.5%</td>
</tr>
</tbody>
</table>

**answered question** 16
**skipped question** 10
| 37. My repository prefers an application that supports persname, corpname, title, etc.) |
| answered question 16 |
| skipped question 10 |

| 38. Please list below any user interface features that are important to you and you do not recall them having been listed in the functional requirements document or mentioned in the webinars. Please add a brief explanation for why each feature is important. |
| Response Count |
| Hide replies 7 |

1. System modularity is very important to me, as I work in an area where it's our job to glue multiple systems together. We'd likely use only bits and pieces of the Son of AT/Archon system so for these bits to be useful we'd have to swap out the other bits we don't need. Mon, Dec 21, 2009 10:13 AM

2. Re: 36, being able to interact with a separate digital object repository sounds wonderful, presuming it could be done seamlessly and in a useful manner. Fri, Dec 18, 2009 8:21 AM

3. I do not fully understand what is meant by Graphical and non-graphical in question 35. With regards to reports in general though, I agree with comment in the reponses to the high-level requirements that a wysiwyg report creator would be immensly useful. #36: Right now we are not dealing with digital objects, so we have no preference either way. Wed, Dec 16, 2009 8:46 AM


5. I didn't answer 34-36. I thought the questions were poor. Mon, Dec 14, 2009 8:02 PM

   On question 34, I think a user interface should be well designed, yet extensible. That's neither more nor less configurable. Design it well, and build it with the ability to customize via plugins. Good, web based open source projects do that. Wordpress is a great example, as plugins are added, new administrative functionalities appear in logically predictable and planned locations. That is what good UI design is.

   answered question 7

   skipped question 19
38. Please list below any user interface features that are important to you and you do not recall them having been listed in the functional requirements document or mentioned in the webinars. Please add a brief explanation for why each feature is important.

On 35, why must there be a choice? Design nice, pre-designed graphical reports that meet the needs of 85% of the installed instances. Provide exports for data so that it can be manipulated with other programs. Provide a good API that people could even build external tools on top of. Design with the future in mind.

On 36, we would want both. We have a digital repository, and occasionally we still like to use Archon's digital library.

6. I am wondering whether it would be too complex to have the ability to hide fields that an institution will never use (staff side) or somehow highlight fields that are mandatory or significant.

Some of the above questions were not answered because we are evaluating those questions ourselves or we had no opinion at this time.

7. 32 & 33. I think I would use which ever was more configurable and easier to use. I am not wedded to one or the other.

35. Not sure what you mean by reports engine being graphical or not.

<table>
<thead>
<tr>
<th>answered question</th>
<th>7</th>
</tr>
</thead>
<tbody>
<tr>
<td>skipped question</td>
<td>19</td>
</tr>
</tbody>
</table>
### 40. My repository prefers

<table>
<thead>
<tr>
<th>Preference</th>
<th>Response Percent</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>A theming system that is simple, but with limited customization</td>
<td>35.3%</td>
<td>6</td>
</tr>
<tr>
<td>A theming system that is flexible and supports extensive customization</td>
<td>64.7%</td>
<td>11</td>
</tr>
</tbody>
</table>

**answered question** 17

**skipped question** 9

### 41. Selected web access functions / features

<table>
<thead>
<tr>
<th>Function</th>
<th>Must have</th>
<th>Very useful to me</th>
<th>Useful to me</th>
<th>Not useful to me</th>
<th>I do not understand the feature</th>
<th>Rating Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>End user can limit search results by date ranges</td>
<td>33.3%</td>
<td>50.0%</td>
<td>11.1%</td>
<td>5.6%</td>
<td>0.0%</td>
<td>3.11</td>
</tr>
<tr>
<td>End user can choose to include or exclude certain fields from search</td>
<td>33.3%</td>
<td>44.4%</td>
<td>11.1%</td>
<td>11.1%</td>
<td>0.0%</td>
<td>3.00</td>
</tr>
<tr>
<td>System administrator can control ranking or weighting of search results</td>
<td>16.7%</td>
<td>27.8%</td>
<td>38.9%</td>
<td>11.1%</td>
<td>5.6%</td>
<td>2.39</td>
</tr>
<tr>
<td>Individual fields within a record can be excluded from web output (for resources, accessions, names, etc.)</td>
<td>61.1%</td>
<td>33.3%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>5.6%</td>
<td>3.44</td>
</tr>
<tr>
<td>System includes integrated interface or method to connect with, and dynamically update, metadata records in other web-based access and/or repository systems</td>
<td>27.8%</td>
<td>44.4%</td>
<td>16.7%</td>
<td>0.0%</td>
<td>11.1%</td>
<td>2.78</td>
</tr>
<tr>
<td>Web 2.0 features such as bookmarking and end-user annotations</td>
<td>0.0%</td>
<td>44.4%</td>
<td>44.4%</td>
<td>5.6%</td>
<td>5.6%</td>
<td>2.28</td>
</tr>
<tr>
<td>E-commerce features</td>
<td>11.1%</td>
<td>22.2%</td>
<td>33.3%</td>
<td>27.8%</td>
<td>5.6%</td>
<td>2.06</td>
</tr>
<tr>
<td>Integrated circulation management features and/or ability to connect to external circulation management</td>
<td>17.6%</td>
<td>17.6%</td>
<td>41.2%</td>
<td>23.5%</td>
<td>0.0%</td>
<td>2.29</td>
</tr>
</tbody>
</table>

**answered question**

**skipped question**
41. Selected web access functions / features

I would like to suggest these other web access functions / features for the application:

1. 1) Contextual display of results (I think the Bentley does a good job of this—see http://quod.lib.umich.edu/cgi/f/findaid/findaid-idx?c=bhlead;cc=bhlead;page=simple); OAC to a less extent), so a researcher knows why a resource is being returned quickly and easily before clicking through a bunch of screens. 2) There needs to be relevancy ranking—whether it is controlled by an individual repository or built in is less of an issue to me, but some type of field weighting should be done. 3) Scoping or siloing so that researchers can limit by repository if shared install; 4) re: Web 2.0, I would pick faceting over bookmarking/end-user annotations, as I think faceting is highly valuable esp. for the less experienced researcher, like undergrads; 5) to be able to refine a query w/o starting search over 6) ability to sort search results, by title, date, creator, etc.

Fri, Dec 18, 2009 8:33 AM

2. * Suggest that any customization features can be subset to specific repositories. This will be important for institutions that are using the application in a shared/multitenant type of arrangement (e.g., OAC).

* For publication of digital objects: suggest mechanisms whereby an institution can set different levels of access (e.g., by IP), and specify the degree to which metadata and/or content files are displayed (e.g., show metadata only, for restricted materials). Also suggest including a mechanism whereby institutions could provide a click-through agreement for accessing some types of materials.

Wed, Dec 16, 2009 8:16 PM

3. This probably falls into one or another of the customizable categories, but please don't restrict us to showing users a simplistic display of the letters of the alphabet as their main access point into our collections. Users and staff need the option of seeing the full, hierarchical structure of our vast array of collections, such as a list of numbered collections in numerical order, or an outline-style text display of all subcreators and the series titles assigned thereto for a specific collection. Many people, when faced with an alphabet to choose from, don't even have any idea what letter to begin with because they have no list of actual creator names to choose from.

Tue, Dec 15, 2009 2:24 PM

4. Again, question 40 is problematic. I want a theming system that is simple, and well designed, yet is extensible and allows for customization. I want a well thought through theming system that's built well from the outset. Create a theming system that is flexible, yet hides much of the complexity. Again, Wordpress is a good example. DSpace is not.

If union catalogs are supported, it would be nice to be able to limit searches to one or more specific repositories.

Mon, Dec 14, 2009 8:10 PM
41. Selected web access functions / features

5. We do not see using the web access capability but if it was included I've checked two items it should include.  

Mon, Dec 14, 2009 2:51 PM

answered question

skipped question

42. Please share any comments, suggestions, or questions you have about prioritization process, including any observations about the utility of the webinars for you as a participant.

Response Count
Hide replies 11

1. Thanks very much for doing this and including Bates. I would just say that I hope the system can be easily installed and maintained for folks like myself, at small repositories w/o a lot of technical help. For us, the web interface will be very valuable as we don't have resources to support a robust search tool for our finding aids.  

Fri, Dec 18, 2009 8:34 AM

Find...

2. The Webinar was immensely informative. It made me aware of the very diverse user group with quite different audience and repository needs. It is fantastic that these tools are freely available, that there are funders willing to support them, and that users are an active part of the development process. THANK YOU for all the work you're doing on this project!  

Fri, Dec 18, 2009 8:22 AM

Find...

3. THANK YOU for excellent webinars and for seeking the input of the archival community as you move forward with integration. The webinars were quite useful to me (as a novice AT user) in understanding the proposed functions for an integrated product. While all of the proposed new functions have value, I think it is critical that the integration team focus on "core" functions  

Thu, Dec 17, 2009 9:58 AM

Find...
42. Please share any comments, suggestions, or questions you have about prioritization process, including any observations about the utility of the webinars for you as a participant.

(resource description, location management, accessioning, name and subject control, public user interface for resource discovery) and having a "web" interface (as opposed to client software that must be installed). Three key adjectives for me: robust, flexible, and user-friendly.

4. We really appreciate the development teams' requests for input on the functional requirements, and proactive work with the AT/Archon user community -- and we'd welcome opportunities to provide feedback on the software architecture, when appropriate. This type of "open" and participatory development is encouraging and seems to be working well for other projects, e.g., CollectionSpace.

From the perspective of the OAC, we'd encourage the development team to consider the following for the new application:

* Incorporate Archon's web browser-based client/server model. This requires less overhead for us to manage (e.g., manage client upgrades, easier to manage MySQL permissions, etc.)
* We really like the idea of including functionality to support digital object management and description, but suggest that the software architecture accommodates cases where repositories are using separate, external systems to manage these resource (e.g., CONTENTdm) -- but would like to integrate them with their archival resource descriptions in the integrated application.
* Please consider the import/export comments previously noted.

Last, we'd be more than happy to provide large EAD test batches, for load testing. We recently ran a beta test where we hosted a shared instance of both AT and Archon, for use by OAC contributors. The main issues they noted:

* Exports required some post-processing to meet OAC (and indirectly RLG) specifications. E.g., missing <unitid> REPOSITORYCODE attribute, <dsc> TYPE attribute, etc.
* Batch importing EADs was slow and in many
42. Please share any comments, suggestions, or questions you have about the prioritization process, including any observations about the utility of the webinars for you as a participant.

cases, required significant pre-processing of files.

Thanks again, and best regards to all of you for 2010.

5. It was very informative to participate in the webinars. I found it somewhat difficult given the format and lack of time to express agreement with other participants, but I wanted to second the general feeling that the new application shouldn’t become too unwieldy. From the perspective of a small institution, with little IT support and only one staff member consistently using the application, it felt like the new product was in danger of becoming too complex, to meet the needs of all types of institutions. I would prefer the model of having a basic application that was easily added to through community developed plug-ins, with more basic user functions to make day-to-day inputting of resource records easier for interns and volunteers; ie find and replace, auto save, undo, etc. I felt that the tool should be easy to implement, to facilitate community acceptance and promote widespread use; a program with too many modules can often have the unintended consequence of intimidating those with little technological expertise. I have found the current AT to be easy to learn and to teach; I’d hate to lose that in the new integrated application. That said, I am very much looking forward to the new project, and am happy to assist in any way I can in its development. Thanks to all of you for your time and effort.

6. I enjoyed the webinars. I found the dialogue between developers and users insightful and helpful in understanding how others are using the AT and ARCHON, where the developers see the integration project going and what the end product might look like, as well as what users would like to see/have in an integrated product and how these desires/needs match ours. Thank you for such an opportunity.

7. Given the amount of development on the table, focusing on an efficient and extensible core system that supports additional modules, plug-ins, and/or connection/compatibility with external applications
42. Please share any comments, suggestions, or questions you have about the prioritization process, including any observations about the utility of the webinars for you as a participant.

may be the best means for achieving the project's lofty goals.

8. The webinar was great - very well coordinated, very intelligible, and very interesting to participate in. I appreciated the detailed spreadsheets of field information that were emailed beforehand, since my institution currently uses neither Archon nor AT. It gave me a frame of reference as each function was being discussed, and enabled me to envision how it might apply to us. I printed them out and was following along as best I could on both days (although when the order of webinar topics deviated from the order of spreadsheet sections, it was a little hard to do that). Prompts keyed to the spreadsheets might have helped. But since the primary purpose of the webinar was to involve current users in the development of the new product, I guess this didn't affect many of the other participants. If you are looking for any testers for portions of the new product, and would like to try things out with data from a large government archives with significant private manuscript holdings and myriad web-available digital images, we'd be happy to share our data, try out prototypes, or otherwise help out as you endeavor to wrangle the needs of so many different kinds of users into one end product.

9. I really enjoyed participating in this group. I thought the webinars were well designed, informative, and productive. Thank you for inviting me to participate.

I think that once a draft is created, it would be great if you could run it back by this group just to ask, "Did we get this right? Do we understand you?" User feedback at every stage is a huge part of the theory of agile development. I hope that theory undergirds this project thoroughly.

10. I have mentioned this, but I will emphasize that with smaller to medium institutions like ours, not only is funding an issue, we also rely on outsourcing for IT and implementing systems of this type. We must proceed with installing either Archon or Archivists Toolkit because we are on a federal grant timeline and cannot wait for the integration. We need the
42. Please share any comments, suggestions, or questions you have about prioritization process, including any observations about the utility of the webinars for you as a participant.

web publishing features of Archon, and really want the management features of AT, as well as some of the new features proposed. Therefore how the upgrade goes will be of huge significance to us with our limited resources.

The webinars were extremely important, not only in being heard, but it was highly informative. We very much appreciate the opportunity.