

# **S203**

Breaking Out of the Box: Transforming Archival Collections and Workflows through Collaborative Description Projects

# Breaking out of the Box: Introduction

- 3 archivist-non archivist partnerships
- Description/metadata projects
- Transform silos into connections



"Drifter," by Studio Drift, Stedelijk Museum in Amsterdam. Photo by Christian Fregnan on Unsplash

In this session, we'll be presenting three dynamic duos involving archivists and non-archivists who have partnered in innovative description or metadata projects to improve access to targeted collections that were at first under described, under utilized, and sometimes even unknown in their repositories and by researchers. Through these presentations, we hope to demonstrate that collaboration on these "internal" or behind-thescenes processes of archival arrangement and description, metadata creation, and cataloging that can often be overlooked and undervalued can have a wide-ranging impact on collections, work flows and relationships, and on users. Archival collections, archivists, and even sometimes archives can be siloed into lonely and unused boxes in the "special" corner of their parent organization. The collaborations we'll be highlighting in this session have transformed these boxes into different shapes or have transformed our perspectives on these boxes.

# **Breaking out of the Box: Presenters**

- Making a New Box: Collaborative Description for Mainstreaming University Publications
  - --Ruth Bryan and Cindy Cline, University of Kentucky
- Building a Better Box: Tracking Workflows for Image Digitization
  - --Rachel Howard and Rebecca Pattillo, University of Louisville
- Boom Goes the Box: Expanding Collaborations in Linked Data for New Music
  - --Lindy Smith and Libby Hertenstein, Bowling Green State University

Here are our three presentations and presenters. Each title is playing on the "box" theme.

10 minutes each, plus 10-12 minutes Q&A.

sheet Breaking Out of the Box:	Transforming Archival Collections and Workflows through Collaborative Description Projects #s203
GOAL	What do you hope to accomplish?
COAL	When do you hope to accomplish it?
	Can your goals be broken into phases?
RESOURCES	What resources do you need to reach your goal (i.e. funding, staffing, specific skills)?
	What resources do you have? What resources do you lack?
	Who in your library can help you fill those gaps? In your institution? In the large profession?
MUTUAL	How does filling your need benefit you? Your collaborator? Your users?
BENEFIT	
	How can you contribute to their goals?

We also have a worksheet for you to use to brainstorm your own potential transformative partnerships. The back of the worksheet includes the presentation titles, presenter names and contact information, and some additional resources about each collaborative project.

The presentations are structured using the worksheet categories.

# Making A New Box: Collaborative Description for Mainstreaming University Publications

 A digitization project revealed a hidden collection: Uncataloged Kentucky Agricultural Experiment Station publications held in Archives







#### Ruth:

A couple of years after I was hired in the University of Kentucky Libraries Special Collections Research Center as the University Archivist, I became aware that some time before my appointment, there had been a digitization project on Kentucky Agricultural Experiment Station annual reports and other publications. The digitization project had been requested and spearheaded by another unit of UK Libraries, the Agriculture Information Center and used their holdings of these publications. The publications are available online at our website, ExploreUK.uky.edu. Explore UK contains digitized content—mainly from Special Collections—and archival finding aids.

Looking through the material that was digitized, I realized that the holdings of extension annual reports in University Archives are more complete than those in the Ag Information Center and could have been included. But, no one outside of those familiar with University Archives (that is, about 3 people) knew of the existence of the publications, because they aren't listed in the ILS.

# Making A New Box: Introduction

Hidden internally and externally because:

- Described by provenance with minimal information (not by title)
- Reason for collecting
- Considered to be "archives"
- Described only in ArchivesSpace (not in InfoKat)
- Shelved by accession number in boxes/on server (not by call number)





#### Ruth:

The extension publications and, in fact, university publications in general, have been hidden not only to external users but also to librarians within the library because they were: \*Described or accessioned by creating unit with minimal extent and total date range information, but not described by individual title.

\*The reason for collecting extension publications traditionally has been to provide evidence of university functions, activities, and history and not to provide information about authors or subjects

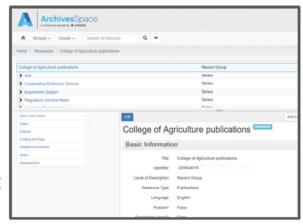
\*So, they had always been considered "archives," not publications, handled within the Special Collections division and not checked in with serials or cataloged by the Collections and Technical Services division, completely separate from Special Collections.

\*They were described only in our archives collection management system, sometimes with an inventory in Excel or Word, accessed only by archival staff

\*They are shelved in boxes or on servers by accession number, not by call number

## Making A New Box: Goals

- A new box within University Archives:
  - Hybrid resource
  - Enhanced archival description and accessioning procedures



- Better intellectual and physical control by title, while also maintaining discovery by the creating unit.
- Preparing publications for mainstreaming into the overall library's holdings



#### Ruth:

Once I understood what the situation was with university publications, I decided this was a resource that was too important to be hidden. This is true not only for extension and College of Agriculture publications, but all university publications. Moreover, the process for handling them needed to be entirely new, because I realized that university publications are key for university history as well as for bibliographic-based research about authors and titles.

- \*They are thus a hybrid resource, and on the archival side, we needed to establish enhanced accessioning and description procedures that created a new intellectual box for all university publications
- \*The new box needed to include individual titles and dates and extents for each title while maintaining the existing accessioning structure by the creating units, so that the archival description (and concurrent physical arrangement) could provide a basis for cataloging, which had never been done with these publications before.
- \*The new box also needed to allow for check in of new publications acquired through the records management program as well as comparison of existing publications with the huge group of duplicates that archivists had been stockpiling for years.
- \*Three highlights of the new archival box include:
- --First, a specific definition of what a "publication" is vs a printed piece like a brochure
- --Second, a main accession records for individual university units and then sub-accession records for individual titles within those units. The main accession record has date ranges and extents for the total publications for that unit. The sub-accession records has date ranges, extents, and container numbers for each title.
- --Third, there is a main resource record for each university unit that lists all titles, including

their subaccession numbers, and date ranges, to enable unit-level understanding of resources available. The screen shot is of a part of the resource record for the College of Agriculture publications.

## Making A New Box: Goals

- A new box across the Library system:
  - Establish a procedure for discovery of all holdings of University publications --MAINSTREAMING



- Demonstrate that archival and bibliographic description can co-exist to provide more access
- Demonstrate that archivists and catalogers work and think more alike than differently



#### Cindy:

In order to mainstream the processing and thus the discovery of all types of holdings of University Publications meant that we needed to broaden or adapt our traditional ways of viewing the materials through description and inventory management.

Published materials did not necessarily need a Library of Congress call number, materials could be stored in folders and boxes. Moving the intellectual control out of a collection level record and into single records provides greater access to formerly hidden materials.

Both archivists and librarians are managing inventory and providing access to that inventory. Whether the inventory is books, departmental records or publications, electronic journals or digital photographs, they need to be organized, described, and accessed.

We had to determine the means to link the single records together. This is done through the display and access to the archives accession and box numbers, through series statements for the publications and through authority control for the college and it's departments

## Making A New Box: Resources

- ArchivesSpace and ILS
- Special Collections cataloger
- University Archivist
- Ability to obtain staffing
  - Archives student assistants, 2015-2019
  - o Summer intern, 2017
  - o Graduate assistant, 2016/17-2019/20
- Support of supervisors/autonomy
- Flexibility and communication







#### Cindy:

-In making a new box the resources we needed and used includes the established standards and procedures for Archives Space and our online catalog, we just needed to build on them.

-We had the shared vision of using the ILS as the connector between the materials and access.

-We had the support of our supervisors for the project, since providing access to hidden collections is a major strategic initiative. University publications provide key information about the research, work and engagement of the university community.

-As library faculty members we had the autonomy to set the direction of our work with this project. We were able to assign students to the project, who were essential in re-organizing the materials to the new scheme, and to train Graduate Assistants in copy and original cataloging.

--Flexibility and communication are important facets of working together, especially when moving materials between units, verifying concepts, establishing procedures, and scheduling workers.

The photos are two of our student workers for the project.

## Making A New Box: Resources

Number of publications accessioned/checked, 2017:

- 48 main accessions/university units
- 194 cubic feet

Number in spring 2019:

- 21 cubic feet
- 2 cubic feet kept







#### Ruth:

On the archives side, here are examples of the sheer volume of publications we have been dealing with. The full-time archives intern for 4 months in summer 2017, Christina Barone worked through 194 cubic feet and created or updated description on 48 university units, not including the College of Agriculture publications, which was another 73 cubic feet and 1000s of individual titles. Two student assistants over 3 years have rearranged and redescribed this unit.

A 10-hour-a-week student assistant for spring 2019 has compared 21 cubic feet of publications marked "copy 2" and has kept only about 2 cubic feet. There are at least another 30 cubic feet left in this chunk of copy 2's.

While it is likely that the majority of all university publications won't be cataloged, even the enhanced archival description alone has the potential to reveal titles, subjects, and date ranges that were once hidden. The ability to check and then discard duplicate titles and to easily add newly received titles is also a major positive increase in the efficiency of our storage space and staff time.

#### Making A New Box: Resources \_\_ |a 2009ua018.0007-39 |b no. 377 1942 Transforming the old box: 100 1\_ |a Davis, Anita Burnam, |e author Adapting descriptive 245 10 |a 4-H club canning project unit I : |b canning fruits / |c by Anita Burnam Davis. 264 \_ 1 la Lexington, Kentucky ; Ib University of Kentucky, College of Agriculture and Home Economics, Extension Division, Ic 1942 information 300 \_\_ |a 8 pages : |b charts ; |c 23 cm. 337 \_ |a unmediated |b n |2 rdamedia 050 \_4 |a \$544.3.K4 |b C6 338 \_\_ |a volume |b nc |2 rdacarrier 090 \_\_ |a S544.3.K4 |b K12 110 2\_ |a University of Kentucky. |b Cooperative Extension Service. 561 1\_ la From the University of Kentucky College of Agriculture Publications (2009ua018), University of Ke 210 0\_ |a Circ., Univ. Kentucky, Coll. Agric., Coop. Ext. Serv. 650 \_0 |a Fruit. 222 \_0 Ja Circular - University of Kentucky. College of Agriculture. Cooperative Extension Service 710 2\_ la University of Kentucky. lb Cooperative Extension Service 245 10 |a Circular - University of Kentucky. College of Agriculture. Cooperative Extension Service. 710 2\_ |a University of Kentucky. |b College of Agriculture. 260 \_\_ |a Lexington, Kv., |b University of Kentucky, College of Agriculture, Cooperative Extension Service. 830 \_0 |a Circular (University of Kentucky Cooperative Extension Service) ; |v no. 377 300 \_ |a v. 362 0\_ |a no. 554- Apr. 1958-362 1 la Ceased with no. 631 in 1972. 650 \_0 |a Agriculture |z Kentucky. Libraries 780 00 | Circular (University of Kentucky. Agricultural Extension Service) | W (OCoLC)24383467

### Cindy:

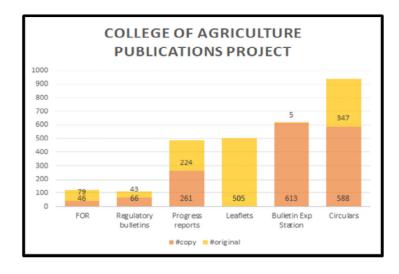
Because the old box of one collection level record wasn't working, we had to transform existing records or create new records.

On the left is the record for the series of Circulars published by the Cooperative Extension Service. On the right is the record for a specific circular. Improved keyword searching through quality cataloging and accurate access points are critical to accessibility. In consultation with archivist, we determined which fields to add for increased access points

The 099 field for accession number + box number, the 490/830 fields for series, the 561 field to record the collection note, and the 710 fields for the college and unit

## Making A New Box: Mutual Benefits

Number of bibliographic records edited and/or added for project





## Cindy:

A major benefit of this project are the additional records created to provide access to formerly hidden topics like managing Christmas tree farms, care of cattle and other farm animals, land management and much more.

Each column in this chart shows the number of titles and records for each project to date. 1574 existing records were used and 1203 new records have been created for a total of 2778.

Additional records mean additional opportunities to access the works created by the faculty, staff and students within the College of Agriculture.

## Making A New Box: Mutual Benefit

- Transforming the old box:
  - Reveal the hidden collection to archivists, librarians, and patrons







#### Ruth:

The new archival box for university publications generally and for College of Agriculture publications specifically has transformed the old archival box, revealing this hidden collection to archivists and librarians within the library and to patrons outside the library. These three examples demonstrate:

\*First, on the left, how a patron found extension publications written by a specific author, Joe Fuqua (this is a snip of the Aeon request list)

\*Second, right, how I found extension publications on hemp to use for an exhibit (I searched the library catalog for "hemp," then filtered for extension publications; the box number to call back from off-site storage is right in the record--easy!)

\*Third, bottom, Reinette Jones, one of the SCRC librarians, recently presented on her encyclopedia-like, ongoing subject gide project, the NKAA database, to the organization Black Soil: Our Better Nature. Both she and they are thrilled with enhanced access to agriculture-related titles, which helps them with their mission to reconnect black Kentuckians to their legacy and heritage in agriculture

The more stuff you have described, out there, the higher the likelihood that it will be discovered. Without the joint expertise of the archivist and the cataloger and without the student, intern, and grad assistant staffing resources, this amazing group of publications wouldn't be visible; they would still be buried. So, this project has (and continues to) transformed the COA publications and our description practices for university publications generally. It has also transformed our understanding of why we collect or the research value of university publications.

# Building a Better Box: Tracking Workflows for Image Digitization







## Rachel

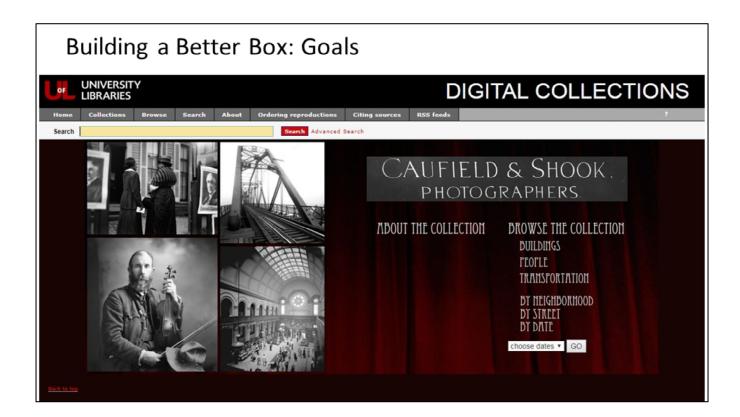
## The problem(s):

- a collection of ~400,000 photographs in all conceivable formats (pictured at left is
  just one side of the shelving in the stacks containing safety negatives) from a local
  photo studio which operated from 1903-1978;
- a history of opportunistic rather than strategic scanning of these images, without documentation of decisions or of administrative and technical metadata or even a consistent server storage location;
- a wealth of associated business records (see right);

Name	From	ntier Nursin	g Service,			Sept. 18	
,			County,	Wandover,	Ky.		
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## Rachel

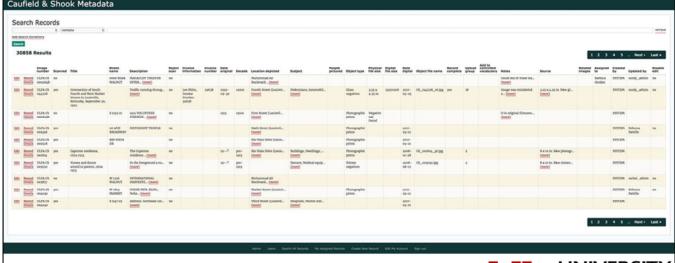
- a partial and poorly documented system for matching images to the studio's information about them for descriptive metadata purposes;
- "resource leveling" involving a workforce split among 3 distinct office spaces on 2 separate floors who don't always know who's doing what and when;
- database tools (Microsoft Access) that can only be opened by one user at a time Resulting in:
  - fewer than 4,000 collection items online after 5 years of work by a volunteer followed by a since-departed Metadata Librarian.



#### Rachel

- More product, BETTER process
- Consolidate and share documentation among all stakeholders and workflow stages
- Present awesome new Metadata Librarian hire with less messy, daunting project
- Overcome "technical debt" (without incurring more)

# Building a Better Box: Resources





## Rachel

- Friendly, helpful Web Services team (2 people with other primary job duties but small FTE percentages devoted to developing tools)
- Digital Initiatives Librarian with working knowledge of SQL
- Photo Archivist willing to mine the institutional memories of her retired predecessors
- Director willing to shift to summer hours on reference desk to institute "Metadata Blitz"
- Colleagues willing to try new things
- New Metadata Librarian!

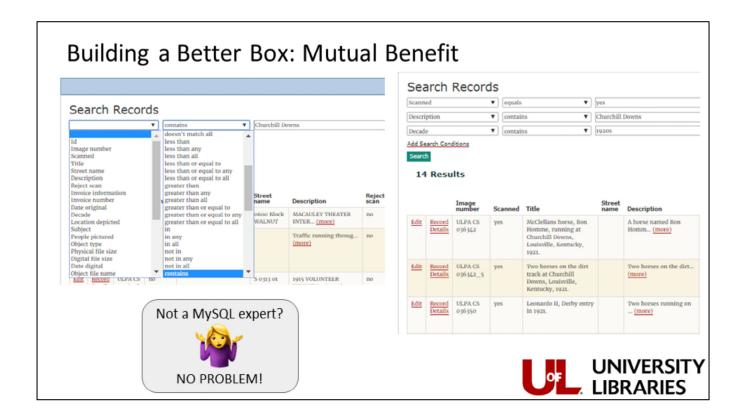
...who will now tell you more about the project from her perspective.

# 

- I inherited the new metamachine and my primary responsibilities for the first year was to increase the number of records in our digital collections.

UNIVERSITY

- Easier for non-metadata experts (students and colleagues) to create metadata. For ex., our f/t Reference Assistant discovered she loved creating metadata records and gave her new excitement for her job. Student employee also trained on metamachine and has expressed interest in becoming archivist!
- The metamachine makes metadata entry easy and more aesthetically pleasing than working in an Access database. Each field is broken into either a free text box or a drop down menu. In conjunction with a "metadata cookbook" that describes each field and its preferred formatting.



- Metamachine search function has a user-friendly interface powered by MySQL (by non-SQL experts like me) makes it quick to find commonalities, such as location, event, and customer, that otherwise required detailed physical processing to discover.
- Search function also made it possible to create metadata in bulk for a large set of images (ex. Construction of a building over the course of months/years separated in physical collection, but discovered through queries).
- Helps us to find very specific requests from researchers, especially images that may not be scanned yet (i.e. Churchill Downs in the 1920s that are scanned)

# Building a Better Box: Mutual Benefit



- Web Services and Systems Librarian develop skills
- Increased access for users
- Doubled records in digital collection



- Systems Librarian Randy Keuhn said the project helps him expand on his own skills, which is important in ever evolving world of programming; helps him stay on top of, or at least, not far behind emerging technologies and coding. Plus, he enjoyed getting to "build a cool thing" that helped the library achieve its goals.
- Increased access by streamlining the workflow to more quickly create and upload records to digital collections. Also, makes answering specific reference requests easier by using search function. Additionally, it has let me focus on other projects, knowing that colleagues and students can continue to create metadata.
- 1 year after completion of metamachine, 3,000 records added to digital collection, exceeding the amount of records that previously took 3 years to complete. After my employment of a year, we doubled the amount of C&S records in digital collections!

Boom Goes the Box: Expanding Collaborations in Linked Data for New Music





Introduce ourselves and our presentation title

## Boom Goes the Box: Goals

- New Music [& Art] Festival
  - History
  - Content
  - Relationships
- Linked Data
  - O Break down silos
  - O The future of information sharing?





## Lindy

New Music Festival: significant history, upcoming anniversary, content in multiple repositories (and some non-respositories), types of content, relationships within new music community

Linked Data: is it the future? BIBFRAME, the internet, allows for linking across institutions, relationship building

## Boom Goes the Box: Resources

- Exploration
- Omeka S
- Partners in Crime
  - o CATS
  - o LITS
  - MLBSSA





## Libby:

This project hinged on the idea of creating a database, which could store, present, and create linked data. Since we initially knew very little about linked data, we started with reviewing the literature on the topic. In reviewing the literature, we found some helpful hints on where to begin our software search and what was possible.

We looked at a variety of software platforms but nothing we found could do what we wanted, with the time and skills we had. We also explored collaborating at a consortium level to pull resources. This fell through, as well. We even looked at grant opportunities to fund the creation of our own software of database tailored to what we wanted. Ultimately, we found another solution.

#### Lindy

Omeka S: We already use Omeka, free (as in puppies), built in LOD, back end and front end, little specialized knowledge required, IT department was happy!

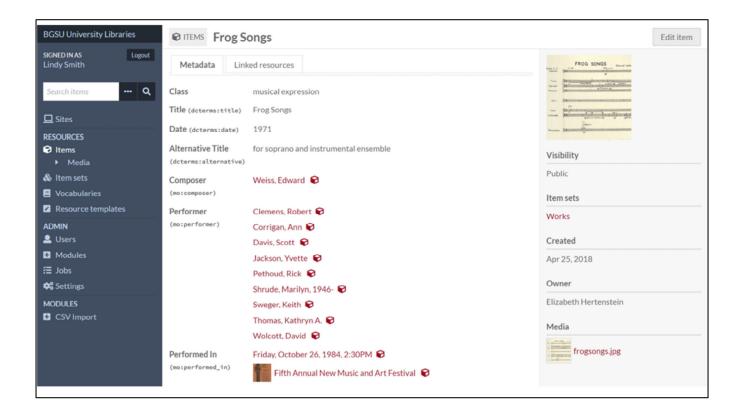
#### Libby

Partners in crime: What each unit contributed

Our linked data database took a village to build with collaboration and cooperation from across the library. Collection and technical services brought metadata expertise to the table, including contributing to the selection of metadata schema and the creation of metadata templates for entries. Also, a good portion of the metadata entry and linking took place in collections and technical services.

Our library IT department was also incredibly important in the development of this project. They helped us in the beginning by telling us what was and was not possible. They also answered our questions about linked data and triples that we had. Finally, they also provided the support for the database and its creation.

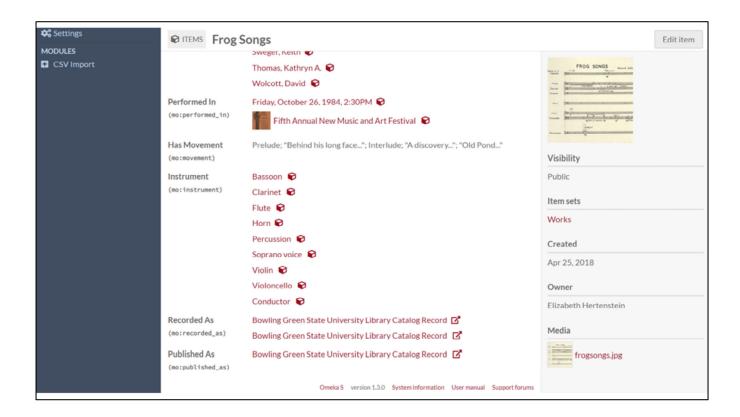
The music library brought subject content, which was incredibly helpful considering not all of us have a musical background. We'd have to call up music and ask, is this instrument the same as that instrument, are these the same people, et. cetera. Music also helped in the creation and selection of schema and templates.



### Libby:

Here you can see an actual entry from the backend of Omkea S. You'll notice that we've used multiple metadata schema in one template. This was really a benefit we found in Omeka S because it allowed us to tailor our data like we've never been able to before.

This entry is for a song. All of the items with a box next to them mean that the item has a relationship to another item in some way and that a linked data triple has been created on the backend. You'll see that we chose the following relationships to highlight, composer, performer, events



## Libby

Instrumentation and we also linked back to our library catalog so that users can see how to access the items in our collection.



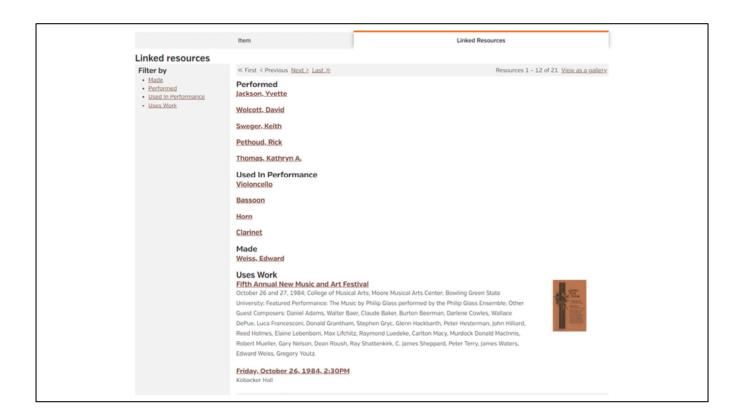
## Libby

In looking at the front end of the project, we wanted to highlight Omeka S's ability to exhibit images and data. So here we have a image of the score.

	Item	Linked Resources
Item Title	Frog Songs	
Date	1971	
	for soprano and instrumental ensemble	
Composer		
Performer	Weiss, Edward	
Performer	Clemens, Robert	
	Corrigan Ann	
	Davis, Scott	
	Jackson, Yvette	
	Pethoud Rick Shrude Marilyn, 1946:	
	Sweger, Keith Thomas, Kathryn A.	
	Wolcott, David	
Performed In	Friday. October 26. 1984. 2:30PM	
Periorited III	Fifth Annual New Music and Art Festival	
Has Movement	Prelude; "Behind his long face"; Interlude; "A discovery"; "Old Pond	
	Bassoon	
	Clarinet	
	Flute	
	Horn	
	Percussion	
	Soprano voice	
	Violin	
	Violoncello	
	Conductor	
Recorded As	Bowling Green State University Library Catalog Record	
	Bowling Green State University Library Catalog Record	
Published As	Bowling Green State University Library Catalog Record	

## Libby:

This is the data that users would be able to see on the front end, which is very similar to the back end. Once again, everything that is linked, will point to the relationships these object have with other objects.



## Libby:

Finally, you see here the user friendly linked data relationships that have been created on the backend.

# Boom Goes the Box: Mutual Benefit

- Cooperation
- Perfect or good enough?





Lindy: Cooperation, what it looked like, what we got out of it, time management, personalities, perfectionism

# **Breaking Out of the Box: Summary**



Berlin, photo by Christian L on Unsplash

# Breaking out of the Box Q&A

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10 minutes each, plus 10-12 minutes Q&A.