

Western Connecticut State University
WestCollections: digitalcommons@wcsu

Libraries

Academic Affairs

Fall 2011

Further Expansion of the Archivists' Toolkit into the ATReference

Brian R. Stevens
stevensb@wcsu.edu

Follow this and additional works at: <https://repository.wcsu.edu/libraries>

 Part of the Arts and Humanities Commons

Recommended Citation

Stevens, Brian R., "Further Expansion of the Archivists' Toolkit into the ATReference" (2011). *Libraries*. 3.
<https://repository.wcsu.edu/libraries/3>

NEWSLETTER

NEW ENGLAND ARCHIVISTS



C O V E R--The Cambridge Memorial Room, 1889. The Cambridge Memorial Room in the Cambridge Public Library, was founded by trustee Thomas Wentworth Higginson in 1887.

I N S I D E-- Brian Stevens writes an informative article on the expansion of the Archivists' Toolkit into ATReference, an embellishment that allows archivists to register and track patrons online. James DaMico, 2011 Richard L. Haas Memorial Award recipient, reports on his experience attending the DigCCurr Professional Institute on Curation Practices for the Digital Object Lifecycle, at the University of North Carolina, Chapel Hill in May. Alyssa Pacy takes us *Around and About* to look at the renovation of the Cambridge Public Library's Cambridge Room, home to the Archives and Special Collections.

TAKING THE PAST INTO THE FUTURE

N E A

New England Archivists

TAKING THE PAST INTO THE FUTURE

Office of Medical History and Archives
The Lamar Soutter Library
University of Massachusetts Medical School
55 Lake Avenue North • Worcester, MA 01655
<www.newenglandarchivists.org>

NEA Executive Board

President:	Nova Seals
President-Elect:	Paige W. Roberts
Past President:	Elizabeth Slomba
Secretary:	Silvia Mejia
Treasurer:	Maria Bernier
Representatives-at-Large:	Karen Adler Abramson Ellen Doon Joan Gearin Jessica Steytler
Clerk:	Jean Nielsen Berry
Development Coordinator:	Jane Ward
Newsletter Editors:	Sally Barkan Michael Dello Iacono Juliana Kuipers Judy Farrar
Web Coordinator:	Veronica Martzahl

Membership in *New England Archivists, Inc.* is open to all.

Dues of \$30/year (\$40 for institutions) should be sent to: Kristine Reinhard, Office of Medical History and Archives, The Lamar Soutter Library, University of Massachusetts Medical School, 55 Lake Avenue North, Worcester, MA 01655, or join online at <www.newenglandarchivists.org>.

Notices of archival events should be sent to: Michael Dello Iacono at <mdelloiacono@suffolk.edu>.

The *NEA Newsletter* is published quarterly in January, April, July and October. The contents of the *Newsletter* may be reproduced in whole or in part provided that credit is given.

Articles and **News** of interest to archivists, historical society members, historians, and other NEA members should be sent to: Juliana Kuipers at <juliana.kuipers@gmail.com> or to NEA Newsletter Editors, c/o Office of Medical History and Archives, The Lamar Soutter Library, University of Massachusetts Medical School, 55 Lake Avenue North, Worcester, MA 01655.

Contributions to the NEA Web site should be sent to: <webcoordinator@newenglandarchivists.org>.

Deadlines for submitting materials are:

November 15 for January issue	February 10 for April issue
May 15 for July issue	August 15 for October issue

Advertising Policy:

There will be no fee to list position openings. Advertisements for archival products will be accepted as space permits. Advertising should be submitted to Jane Ward, (978) 459-2129 or <jane.ward@comcast.net>.

Rates: Full page: \$125; half page: \$75; quarter page: \$40. Payment is requested at the time the ad is submitted. All checks should be made payable to *New England Archivists*.

Newsletter design by Culp Design <www.culpdesign.com>



Table of Contents

From the Editors	3
Archival Insight	
Further Expansion of the Archivists' Toolkit™ into the ATReference.....	4
Internet Tidbits	8
Inside NEA	
From the President.....	9
Executive Board Meeting Report.....	9
New Members	11
NEA 2011 Annual Business Meeting	12
People	13
News and Notes	
Connecticut.....	14
Massachusetts	14
Vermont	19
Other News	19
Haas Award Report	
2011 Richard L. Haas Memorial Award Award Recipient Report	20
Around & About	
A New Space for an Old Collection: The Cambridge Public Library Opens its Archives and Special Collections	22
Reviews	26
Calendar	27
This Season In New England History	28

ARCHIVAL INSIGHT

Further Expansion of the Archivists' Toolkit™ into the ATReference

by Brian Stevens, Archivist & Special Collections Librarian, Western Connecticut State University

In May 2011, the Rockefeller Archive Center (RAC) released a beta version of its embellishment to the Archivists' Toolkit™ called ATReference that allows archives to register and track patrons and their usage of Resources. The ATReference will install as simply as an update to the Archivists' Toolkit™ and provides the first steps toward a robust patron tracking tool within archives in the Archivists' Toolkit™ framework.

I worked as one of the two archivist/analysts involved in the development of the open-source Archivists' Toolkit™ v.1.0 from 2004-2007, and implemented it in 2008 at the repository I oversee. Having been both under the hood and an Archivists' Toolkit™ adopter, it has been a pleasure to see this open-source application so widely adopted and to see first-hand how the Archivists' Toolkit™, or the AT as it has become known, can help streamline archival workflows. It has been a significant improvement over the home-made systems for accessions, authority control, location management, and EAD production that were in place here in the Western Connecticut State University Archives.

While there are some aspects that could use improvement, it works and works well. One aspect of the AT that does not need improvement is that it is free and is open to the community to improve and embellish. Since version 1, the AT has improved substantially and it has been the hope of many in the archives community that this trajectory would continue. Unfortunately, recently some confusion has arisen out of the third phase of the AT's "official" development.

The Archivists' Toolkit™ is the self-described:

... first open source archival data management system to provide broad, integrated support for the management of archives. The main goals of the AT are to support archival processing and production of access instruments, promote data standardization, promote efficiency, and lower training costs.¹

Additionally, the AT on its introductory page promises that: "Future functionality will be built to support repository user/resource use information..."²

The number of downloads and AT implementers is no longer published on the AT site but it is safe to say that its user base is significant and, in as much as it has been adopted so widely, one can say it has been a success. The future of the project or at least the direct lineage of the administration, development and improvement of the AT has stayed with New York University and the University of California San Diego. However, rather than continuing to improve the existing AT, the decision was made to refocus development of the AT and they have called this refocusing effort archivesSpace. ArchivesSpace endeavors to marry the Archivists' Toolkit™ to the University of Illinois' Archon. Archon, like the AT, has a large user base. The archivesSpace project is described as follows:

We are archivists and librarians working together to plan a state-of-the art archives collection management system that builds on the strength of the Archivists' Toolkit and Archon open source products, and that incorporates the best of the innovative technical and archive functions. We are funded by the Andrew W. Mellon Foundation to develop an architectural framework, a maintenance and transition plan for the existing two tools, as well as a community governance and sustainable business model for the new unified tool.³

So rather than development continuing on the AT and Archon individually, archivesSpace has become the focus for both applications' administrators. It is important to note that what the archivesSpace group is undertaking is a plan that could turn into a product, and not the building of a product. Any development will take place after a plan is delivered and someone turns that plan into code. Unfortunately, the planned development of a unified product that would abandon the core AT (and Archon) model,

has created confusion in the user community. While it seems like the goals of the archivesSpace project are worthy and congruent with those of AT and Archon, there are those in the archives community that have invested much time, effort and resources into adopting the AT (and Archon), therefore the prospect of a migration into an entirely new and untested system like archivesSpace does not immediately seem practical or appealing. For these archivists further development of the existing AT is quite preferable.

The most appealing development for the AT would be the user/resource use information that had been promised. The AT's lack of patron registration capability is significant if its stated goal is to improve efficiency. While being able to dispose of locations and accessions databases when implementing the AT at this repository, it is still necessary to maintain a separate database for patron registration, reprographics services, and use statistics. Though not prohibitively difficult to maintain, it is preferable to maintain one less silo of data and be able to link a Resource component in the AT to a patron directly. In conversations with other archivists, they have been looking forward to added patron functionality in the Archivists' Toolkit™ and it has been a disappointment that further development of this functionality was not forthcoming from the AT's "official" project team.

AT into ATReference

In keeping with the spirit of open-sourced projects, in early 2009 the user community responded to the need for AT user/resource use functionality. The RAC had made the decision to adopt the AT, but had reservations about the AT's capabilities of that time. User/resource use information tracking was needed and when it became apparent that this functionality was not going to be added to the existing AT by its "official" development team and administrators, the RAC decided to assemble their own team to develop user/resource use functionality and share what was developed with the community. Because other repositories that have developed useful plug-ins for the AT, the RAC's decision to undertake its own development had precedent in the history of the application.

Marisa Hudspeth, lead archivist of the digital program at the RAC, contacted the AT's original developer/programmer, Lee Mandell, and one of the AT's former archival analysts, Sibyl Schaefer, to help spec out and build this

user/resource functionality. Together, they developed a very ambitious five-phase plan that would: replace the RAC's implementation of Re:discovery™ for managing patron registration and duplication services; consolidate multiple paper and electronic patron registration systems; and streamline and automate data capture of researcher services. These phases were described as: 1. patron registration; 2. duplication services; 3. retrievals and use tracking; 4. reference requests and reading room scheduling; and 5, design of a web interface with personalized user accounts. Completion of the five-phase project was scheduled to be accomplished by July 2012.⁴

Through 2010 and 2011, Mandell has been building functionality onto the AT that accomplishes the first and some of the second phase of development delineated by Hudspeth and the RAC. The project was formally announced at SAA in August last year and each new version leading up to the beta release has been posted on the code-sharing site, github <<https://github.com/RockefellerArchiveCenter/ATReference>>. Along the way, I was brought in to help with testing and creating reports.

We scanned Marilyn.
We converted Nixon.
We cleaned up Elvis.
Honest.

The Crowley Company's front-end capture systems and comprehensive conversion services make the process of archiving books, images and records – dare we say it? – historically simple.

If you can see it,
we can scan it.

CROWLEY

(240) 215-0224 www.thecrowleycompany.com



What does ATReference do?

This beta release looks and feels just like the latest version of the AT but the ATReference's (ATR) menu items contain new functionality visible to upper-level users (those with more user privileges).

One already familiar with the AT will find that the ATR's data listings behave, search, and sort just like other functional areas in the AT. Additionally, with the release of the ATR beta, the RAC has compiled a manual that covers the new functionality <www.rockarch.org/publications/guides/ATReferenceManual_v6.pdf>. However, most regular AT users will find the Patrons area fairly intuitive.

The ATR installs identically to the AT and the maintenance software downloaded with ATR can be used to upgrade an existing AT-configured database. Archivists will want to try the ATR out before upgrading their production database to accommodate it, but installation is identical to the AT – install the ATR client; create a blank database; run the ATR's maintenance program against the blank database to configure it; start the client and point to that newly configured database.

The first change you will see is in the branding graphics upon starting the client. The more substantive changes are apparent in the menu items. First, in the import menu, one will see the option to import patron data as shown in figure 1:



Figure 1

In the paradigm of other AT data imports, the ATR will import patron data in XML that is mapped to fields in the ATR.

The other difference is in the "Tools" menu where one will find an option to view "Patron Records," "Services,"

"Subject Reference Report," and "Patron Visit Summary," as shown in figure 2.

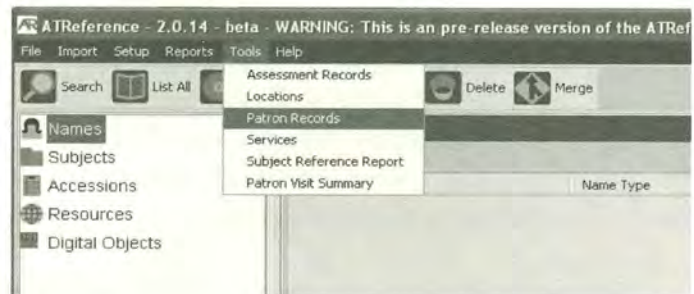


Figure 2

First, the "patron records" option opens to a patron's name and contact information (figure 3):



Figure 3

A Patron record looks very similar to a Name record in the Names area of the ATR; a Patron record holds much of the same data contained in an ATR Name record but with different behaviors. A Patron cannot be linked to a Resource or Accession like a Name. At the database level, Patrons are in their own table. For example, if your repository has a patron that also has the role of creator of a Resource, two records for that person would exist in the ATR, one in the Names area of the ATR that would link to the Resource as a Name with the role of "creator" and one record in the Patrons area to describe that person as a patron. A reason for this "complication" is that Patron publications and Patron visits may be linked to Subjects and Names (as subjects); therefore, there was the potential for a more perplexing complication of Names linking to other Names and then the issue of blocking Patrons information from users who are viewing Names records. The solution was to split off Patrons from Names.

In the Patron record, there are tabs that allow entries related to visits and services, funding and publications, and a section devoted to user defined fields. Patron visits allow tracking of research topics, date of visit, and the reference archivist associated with a visit. It also allows one to record forms a patron may have filled out (permissions forms, duplication forms, etc.). The services section will allow the linking of visits to services like digitization and reprographics; however, that functionality has not been finished for this beta release. The third tab provides entry points for noting Patron funding, such as grants received for their research and the date of that funding. Also in the third tab is an area to enter data on publications associated with that patron's research.

The tools menu item "Services" provides areas for entry of data on the category of service provided, description of that service, units, cost per unit and way to limit the number of units per calendar year for repositories who may, for example, only allow 100 photocopies per patron. While this area is visible in the beta release, it is not yet usable, but is slated to be functional in the next release of the ATR.

The other options in the tools menu provide users with statistics related to patron visits within a specified range of dates. This was designed in particular for cutting and pasting into annual reports. The "Subject Reference Report" provides a list of subjects and who and how many patrons were associated with that subject within the specified period. The "Patron Visits Summary" provides simply the number of visits within a specified period.

Reports associated with the patrons area provide a formatted export of the patron record or records, an address list, email list, and a patron bibliography.

The newest revision will allow linking of "Visits" to "Resources" and in later iterations we will see the ability to link "Resource Components" to a "Patron Visit"; this functionality will be the piece that will realize the use-tracking ability that the ATR really needs. The ability to link these types of data will have obvious benefits for creating annual reports and in security, but also in guiding patrons to resources; if a patron is researching, for example, "railroads," then the archivist may at the push of a button direct another railroad-researcher to all the resources that the previous railroad-researcher called. This ability would be particularly helpful in an archive like this one where undergraduates often have similar topics to research every year.

This beta release of the ATR provides a lot of added functionality to the AT and future releases promise to address the entire issue of user/resource use functionality, a downloadable beta version of the ATR client is provided on the ATReference github⁵ site at <<https://github.com/RockefellerArchiveCenter/ATReference/wiki>>.

The RAC is inviting archivists to participate in the development of the ATR by opening up communications with the community on their github wiki. The RAC hopes that this project will provide an innovative solution for archives and further encourage wider adoption of the Archivists' Toolkit™. By significantly increasing the AT's functionality and taking the open-source model to heart, this endeavor may serve as a national model for contributing to open-source technology across the archival community. It may also signal a trend in the way open-sourced projects may be sustained in the future.

It will be interesting to see how the archives community responds to this new turn in the story of the AT and to see if the RAC's encouragement of AT repositories to test and provide feedback on the ATR bears fruit. It is the RAC's goal to make the ATR adhere as much as possible to the needs of the community while still satisfying its own local requirements.

It should be the goal of archivists to see that projects such as this get support so that other proprietary solutions do not insinuate themselves in their place. It is a positive development in the profession that this bit of software created and maintained by archivists for archivists in an open-source and collaborative environment has thrived and grown. It is not unreasonable to expect that this trend will continue not only with this project but also with further developments in projects like archivesSpace and Archon. ■

1. Archivists' Toolkit "Introduction to the Archivists Toolkit". 2009. Archivists' Toolkit. 28 Apr 2011< <http://archiviststoolkit.org/node/96>>.

2. Ibid.

3. ArchivesSpace "About". 2010. ArchivesSpace. 28 Apr 2011< <http://archivesspace.org/about.html>>.

4. Hudspeth, Marisa and Sibyl Schaefer. Presentation at the Archivists' Toolkit and Archon Roundtable, SAA (2010). ATRM SAA 2010.ppt, <http://www2.archivists.org/sites/all/files/ATRM%20SAA%202010.ppt>

5. Github is a code-sharing service where source code may be easily reviewed and/or contributed to.