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Small Steps Make Giant Leaps: An Incremental Approach to Technical Services Workflow Automation

Rebecca B. French

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SMALL STEPS MAKE GIANT LEAPS

AN INCREMENTAL APPROACH TO TECHNICAL SERVICES WORKFLOW AUTOMATION

Rebecca B. French, James Madison University

A SERIES OF STEPS



SOME DEFINITIONS

- Collection
 - “A group of materials with some unifying characteristic”
 - E.g., items from a person or organization
- Finding aid
 - “Guide or inventory of the contents of an archival collection”
 - Contains historical or biographical information, description of collection arrangement, and container list (inventory)
 - Encoded Archival Description (EAD) is the standard machine-readable format

```

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  <did>
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    <langmaterial><language langcode="eng">English</language>.</langmaterial>
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    <p>Series 5: Financial Files, 1941-1971, houses all loose financial documents relating to the Wampler businesses. The majority of the series consists of receipts from shipping, Wampler Feed & Seed, Sunny Slope Farm, travel expenses, and general purchases while the second part of the series contains miscellaneous bank statements, account information, tax documents for state and federal income, business taxes, and some Wampler family business documents.</p>
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  <c02 level="file">
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  </c02>

```

FINDING AID

showing series description
and container list

Series 5: Financial Files, 1941-1971

Series 5: Financial Files, 1941-1971, houses all loose financial documents relating to the Wampler businesses. The majority of the series consists of receipts from shipping, Wampler Feed & Seed, Sunny Slope Farm, travel expenses, and general purchases while the second part of the series contains miscellaneous bank statements, account information, tax documents for state and federal income, business taxes, and some Wampler family business documents.

Title/Description

Instances

Title/Description	Instances		
Bank Statements and Receipts, 1928-1969	box 23	folder 5	
Tax Documents, 1942-1961	box 23	folder 6	
Business Financial Documents, 1946-1970	box 23	folder 7	
General Sales Receipts, 1940-1953	box 23	folder 8	
General Sales Receipts, January-July 1954	box 24	folder 1	
General Sales Receipts, August-December 1954	box 24	folder 2	
General Sales Receipts, 1955-1971	box 24	folder 3	
Commonwealth of Virginia: Agency Purchase Order.			
Travel Receipts, 1942-1964	box 24	folder 4	

DISCOVERY PLATFORMS

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Wampler Business Records, 1916-1972

Browse manuscript collections

Request for use in Special Collections

Summary Information

Repository: Special Collections, Carrier Library, James Madison University

Creator: Wampler, Charles Weldon, Sr., 1885-1976

Title: Wampler Business Records

Collection No.: SC 0202

Date: 1916-1972

Extent: 31 boxes, 11 Cubic Feet

Language of the Material: English

Abstract: This collection contains correspondence, reports, photographs, business documents, financial statements, publications, and other documents that relate to the businesses of Charles Wampler Sr. (Wampler Feed and Seed Company) primarily and to a lesser degree his son, Charles Wampler Jr. (Wampler Food Incorporated). Correspondence comprises the bulk of the collection.

Preferred Citation
[identification of item], [box #, folder #], Wampler Business Records, 1916-1972, SC 0202, Special Collections, Carrier Library, James Madison University, Harrisonburg, Va.

Bio/Historical Note
The Wampler family emerged upon the American poultry industry in the early twentieth century changing the industry practices and beliefs. As a result of and helped the Shenandoah Valley poultry industry emerge as a major industry in the county during a period of...

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Wampler business records, 1916-1972

Author: Charles Weldon Sr. Wampler

Edition/Form: Downloadable archival material : English

Summary: This collection contains correspondence, reports, photographs, business documents, financial statements, publications, and other documents that relate to the businesses of Charles Wampler Sr. (Wampler Feed and Seed Company) primarily and to a lesser degree his son, Charles Wampler Jr. (Wampler Food Incorporated). Correspondence comprises the bulk of the collection.

Rating: 4.5 out of 5 (not yet rated) 0 (with reviews, like the first)

Subjects: Wampler, Charles W., -- 1885-1976; Wampler, Charles W., -- 1915-1976; Wampler family.

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RECORD # b2550596 Search Available items only

Wampler business records, 1916-1972

Wampler, Charles Weldon, Sr., 1885-1976, author

Location (1)	Call number	Status (1)
Special Collections	SC 0202	AVAILABLE

Bookmark URL for this catalog record
<http://catalog.lib.jmu.edu/#/Record=b2550596>

Local Note: In order to streamline the process of applying collection numbers, Special Collections staff completed a large-scale renumbering campaign in 2017-2018. This collection was previously cataloged as SC 5024

Description: 31 boxes, 11 cubic feet

Organization/Arrangement: The collection is arranged chronologically by topic in the following ten series: Series 1: Administrative Files, 1937-1972; Series 2: Correspondence, 1916-1971; Series 3: Date Books, 1939-1965; Series 4: Farm Ledgers, 1932-1951; Series 5: Financial Files, 1941-1971; Series 6: Philanthropic and Professional Organizations, 1939-1971; Series 7: Photographs, 1939-1971; Series 8: Press and Advertising Files, 1920-1963; Series 9: Print and Ephemera, 1916-1971; Series 10: Reports and Studies, 1927-1969; Series 11: Business and Organization Lists, 1941-1967

Access Restrictions: Collection is open for research. Researchers must register and agree to copyright and privacy laws before using this collection. Please contact Research Services staff before visiting the James Madison University Special Collections Library to use this collection.

Summary: This collection contains correspondence, reports, photographs, business documents, financial statements, publications, and other documents that relate to the businesses of Charles Wampler Sr. (Wampler Feed and Seed Company) primarily and to a lesser degree his son, Charles Wampler Jr. (Wampler Food Incorporated). Correspondence comprises the bulk of the collection.

Cite As: [identification of item], [box #, folder #], Carrier Library, James Madison University

Source of Acquisition: Donated by Barbara W. Melby, date

Biographical/Historical Note: The Wampler family emerged upon the American poultry industry in the early twentieth century changing the industry practices and beliefs. As a

Catalog (Sierra ILS)

Virginia Heritage

Guide to Manuscripts & Archives

Collection in Virginia

BASIC SEARCH ADVANCED SEARCH BROWSE CITATION PRINT VIEW

SEARCH FINDING AID (Go)

ADMINISTRATIVE INFORMATION

BIO-HISTORICAL NOTE

SCOPE AND CONTENT

ARRANGEMENT

INDEX TERMS

RELATED MATERIAL

BIBLIOGRAPHY

CONTAINER LIST

Series 1: Administrative Files, 1937-1972

Series 2: Correspondence, 1916-1971

Series 3: Date Books, 1939-1965

Series 4: Farm Ledgers, 1932-1951

Series 5: Financial Files, 1941-1971

Series 6: Philanthropic and Professional Organizations, 1939-1971

Series 7: Photographs, 1939-1971

Series 8: Press and Advertising Files, 1920-1963

Series 9: Print and Ephemera, 1916-1971

Series 10: Reports and Studies, 1927-1969

Series 11: Business and Organization Lists, 1941-1967

People

A GUIDE TO THE WAMPLER BUSINESS RECORDS, 1916-1972: SC 0202

A COLLECTION IN SPECIAL COLLECTIONS
COLLECTION NUMBER SC 0202

JAMES MADISON UNIVERSITY

Special Collections, Carrier Library, James Madison University

Special Collections
Carrier Library
James Madison University
Harrisonburg, Virginia 22807
USA
Phone: (404) 968-3612 Fax: (404) 968-3405
Email: library-special@jmu.edu
URL: <http://www.lib.jmu.edu/special/>

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Processed by: Trevor Alford, Kathryn Barak, Gabriel Camut, and James Dennis, May 2011, Tiffany Cole September 2018

Repository	Collection Number	Title	Extent	Creator	Language	Abstract
Special Collections, James Madison University	SC 0202	Wampler Business Records, 1916-1972	11 cubic feet, 31 boxes	Wampler, Charles Weldon, Sr., 1885-1976	English	This collection contains correspondence, reports, photographs, business documents, financial statements, publications, and other documents that relate to the businesses of Charles Wampler Sr. (Wampler Feed and Seed Company) primarily and to a lesser degree his son, Charles Wampler Jr. (Wampler Food Incorporated). Correspondence comprises the bulk of the collection.

Administrative Information

Access Restrictions: Collection is open for research.

Virginia Heritage

Wampler Business Records, 1916-1972

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[Summary Information](#)

[Bio/Historical Note](#)

[Scope and Content](#)

[Arrangement](#)

[Administrative Information](#)

[Related Materials](#)

[Index Terms](#)

[Bibliography](#)

[Collection Inventory](#)

[Series 1: Administrative Files](#)

[Series 2: Correspondence](#)

[Series 3: Date Books](#)

[Series 4: Farm Ledgers](#)

[Series 5: Financial Files](#)

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Repository:	Special Collections, Carrier Library, James Madison University
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Date:	1916-1972
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[^ Top](#)

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The Wampler family emerged upon the American poultry industry in the early twentieth century changing the industry practices and beliefs. As a result of... and helped the Shenando...

In 1811, John Wampler ar... county during a period w...



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Wampler business records, 1916-1972

Author: [Charles Weldon Sr Wampler](#)

Edition/Format: Downloadable archival material : English

Summary: This collection contains correspondence, reports, photographs, business documents, financial statements, publications, and other documents that relate to the businesses of Charles Wampler Sr. (Wampler Feed and Seed Company) primarily and to a lesser degree his son, Charles Wampler Jr. (Wampler Food Incorporated). Correspondence comprises the bulk of the collection.

Rating: ☆☆☆☆ (not yet rated) 0 with reviews - Be the first.

Subjects: [Wampler, Charles W., -- 1885-1976.](#)
[Wampler, Charles W., -- 1915-](#)
[Wampler family.](#)
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 Wampler, Charles Weldon, Sr., 1885-1976, author

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Cite As [identification of item], [box #, folder #]
Carrier Library, James Madison University

Source of Acquisition Donated by Barbara W. Melby, daughter of Charles Wampler Sr.

Biographical/Historical Note The Wampler family emerged upon the James Madison University campus in the late 19th century. As a result of their industry practices and beliefs. As a result of their industry practices and beliefs.

Catalog (Sierra ILS)

SEARCH FINDING AID

[ADMINISTRATIVE INFORMATION](#)

[BIO HISTORICAL NOTE](#)

[SCOPE AND CONTENT](#)

[ARRANGEMENT](#)

[INDEX TERMS](#)

[RELATED MATERIAL](#)

[BIBLIOGRAPHY](#)

[CONTAINER LIST](#)

- [Series 1. Administrative Files, 1937-1972](#)
- [Series 2. Correspondence, 1918-1971](#)
- [Series 3. Date Books, 1939-1965](#)
- [Series 4. Farm Ledgers, 1932-1951](#)
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- [Series 10. Reports and Studies, 1927-1969](#)
- [Series 11. Business and Organization lists, 1941-1967](#)

[PEOPLE](#)

A GUIDE TO THE WAMPLER BUSINESS RECORDS, 1916-1972:SC 0202

A COLLECTION IN
SPECIAL COLLECTIONS
COLLECTION NUMBER SC 0202



Special Collections, Carrier Library, James Madison University

Special Collections
Carrier Library
James Madison University
Harrisonburg, Virginia 22807
USA
Phone: (540) 568-3612
Fax: (540) 568-3405
Email: library-special@jmu.edu
URL: <http://www.lib.jmu.edu/special>

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Processed by: Trevor Alvord, Kathryn Barela, Gabriel Camut, and James Dennis, May 2011; Tiffany Cole September 2018

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ADMINISTRATIVE INFORMATION

Access Restrictions

Collection is open for research

Virginia Heritage

WHO IS INVOLVED?

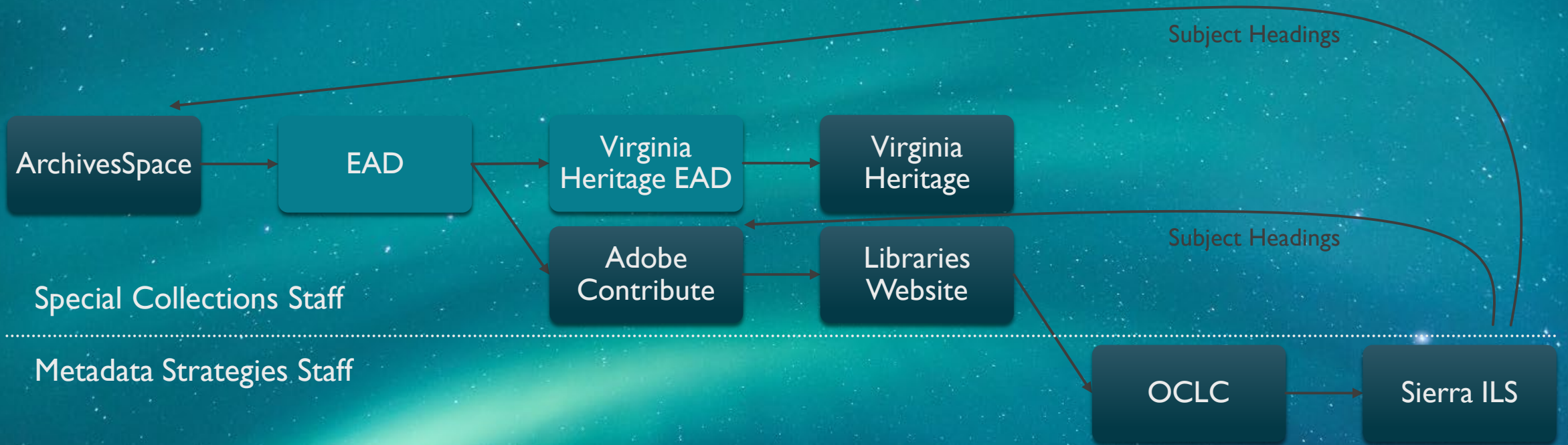
Special Collections

- Two archivists
 - Arrange and describe manuscript collections
 - Put finding aids on Libraries website
 - Submit finding aids to state-wide Virginia Heritage database

Metadata Strategies

- Cataloger
 - Creates bibliographic records for manuscript collections, based off of finding aids
 - Performs subject analysis
 - Adds records to OCLC and our local catalog
- Metadata librarian
 - Workflow automation

ORIGINAL WORKFLOW

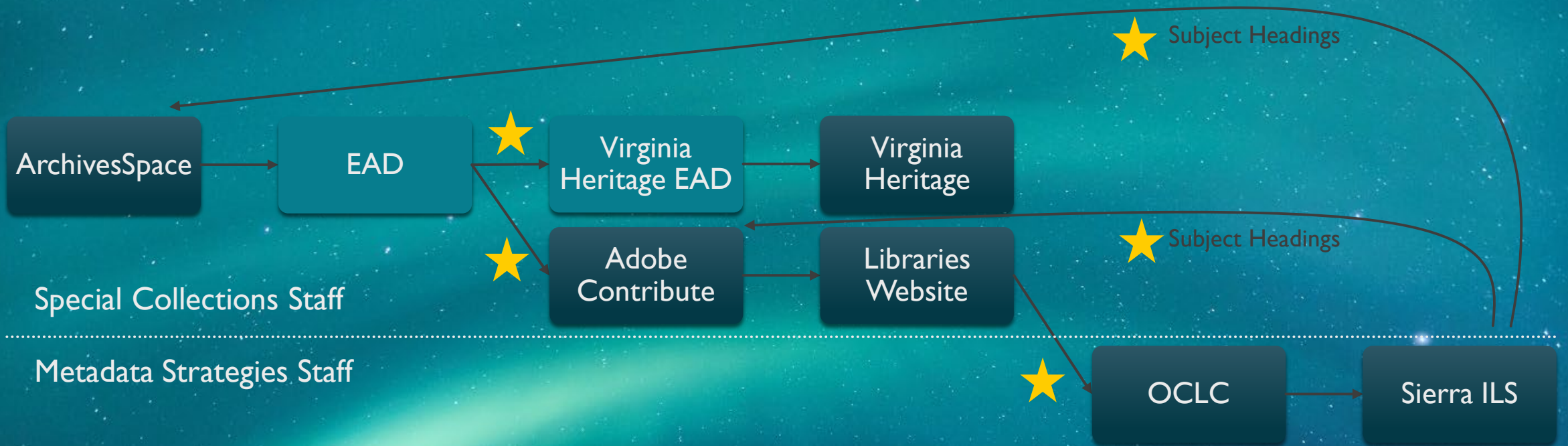


Legend

System or Platform

File

ORIGINAL WORKFLOW



Legend

System or Platform

File

★ Significant Manual Work

PROBLEMS WITH MANUAL WORKFLOW



Time consuming

PROBLEMS WITH MANUAL WORKFLOW



Time consuming



Opportunities
for human error

PROBLEMS WITH MANUAL WORKFLOW



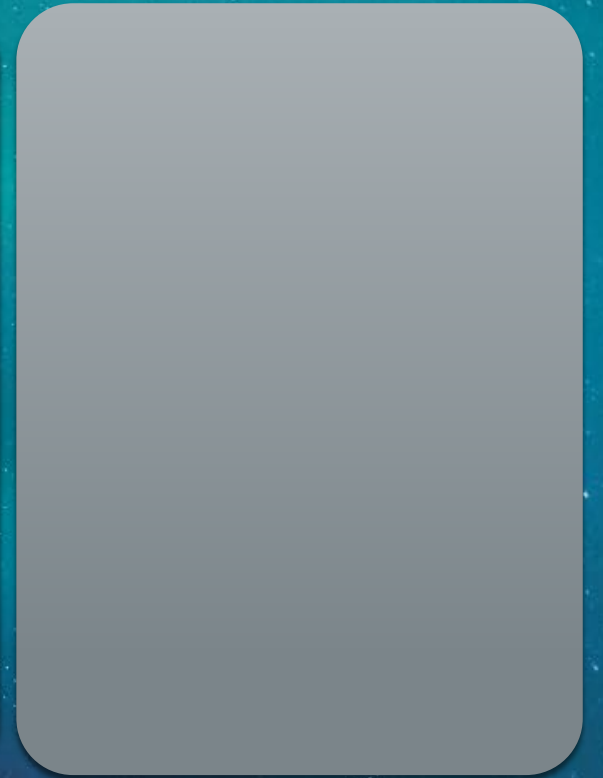
Time consuming



Opportunities
for human error



Hard to keep
different
platforms in sync



PROBLEMS WITH MANUAL WORKFLOW



Time consuming



Opportunities
for human error



Hard to keep
different
platforms in sync

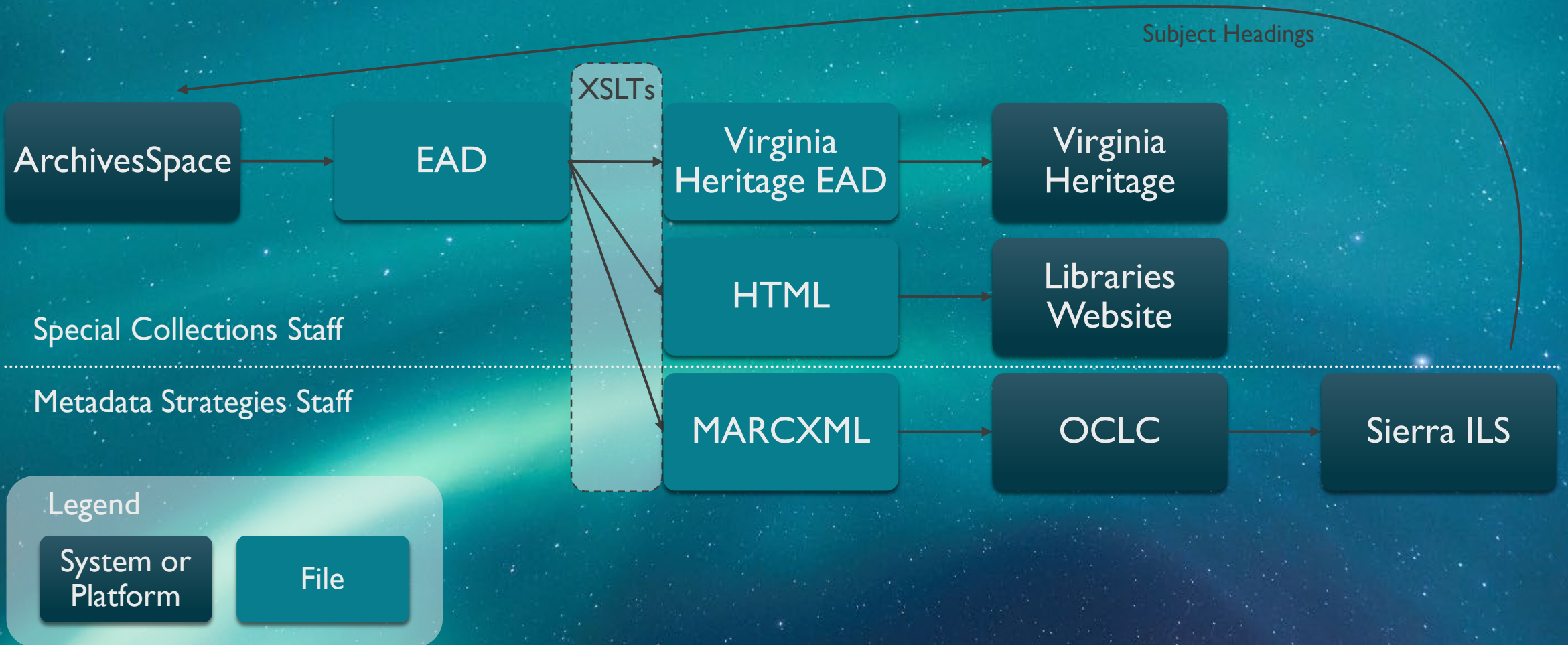


Boring

STEP 1: XSLTS

- Deal with the biggest pain point (hand-encoding for Virginia Heritage, copy and paste to create web page)
- XSLT: language for transforming XML documents into other XML documents
- Wrote XSLT transformation scripts
 - Make (most of) the changes needed to create a Virginia Heritage EAD
 - Create web page HTML from EAD
 - Create MARCXML catalog record from EAD
- Special Collections staff used Oxygen XML Editor to run the XSLT transformation scripts

STEP I: XSLTS

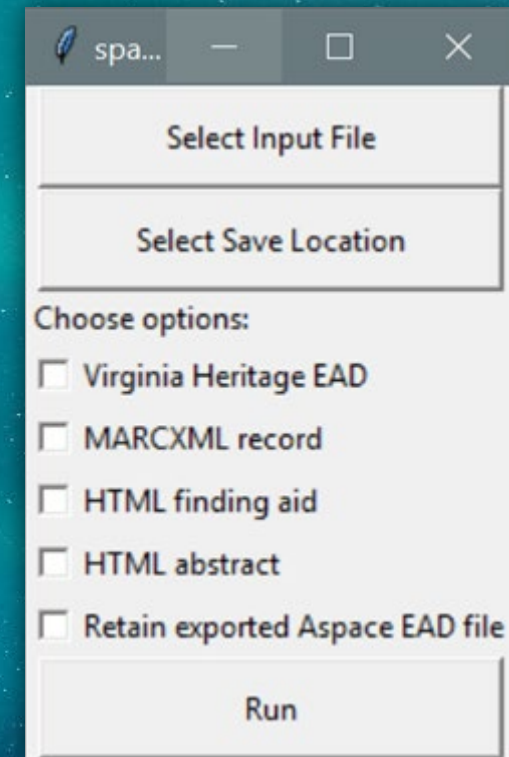


“...this is a **DRASTIC** improvement over my previous workflow.”

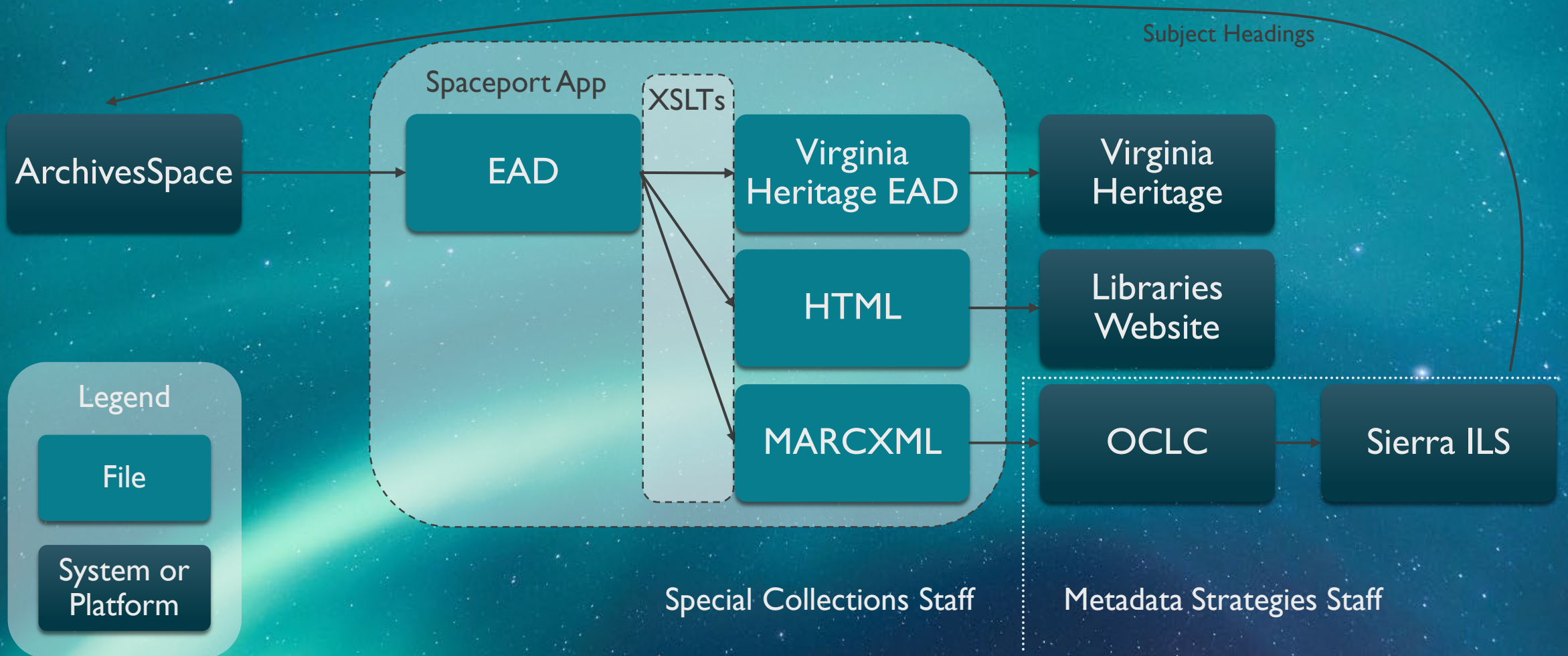
Tiffany Cole, Special Collections Archivist

STEP 2: SPACEPORT PYTHON APP

- Spaceport, a custom Python app
 - Uses ArchivesSpace API to get EAD from ASpace (replacing manual export)
 - Runs XSLTs using Saxon XSLT processor (replacing Oxygen)
 - Does additional Virginia Heritage non-XSLT work
 - Graphical user interface includes selection of options
- Packaged into an executable with PyInstaller
- Hosted on shared network drive for ease of updating
- Code available at https://github.com/frenchrb/JMU_ArchivesSpace

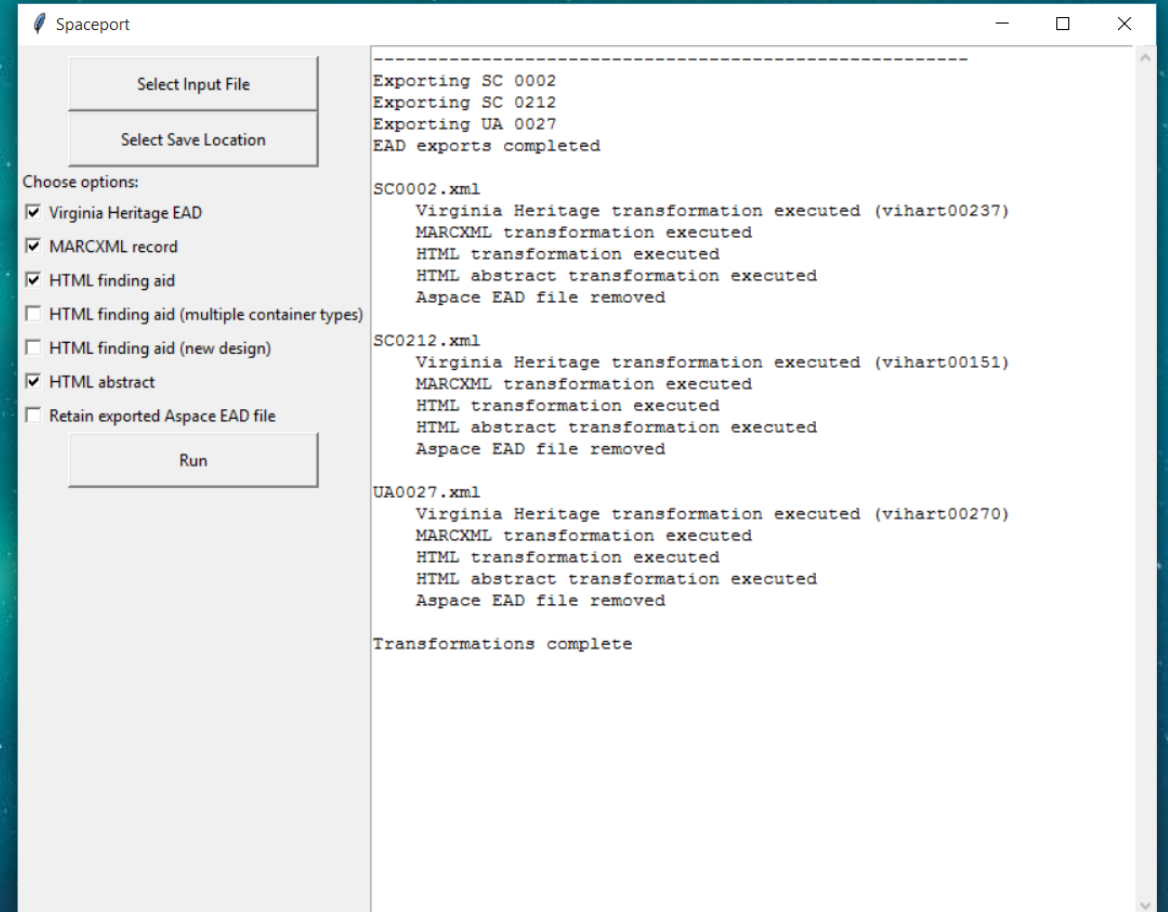


STEP 2: SPACEPORT PYTHON APP



STEP 3: REFINING SPACEPORT

- Additional modifications to Spaceport
 - Moved status reporting to the GUI to show progress as the app runs (was previously in a separate window)
 - Added error reporting to the GUI
- Waited to make these changes until after basic functionality was thoroughly tested
- No change to workflow



BENEFITS OF IMPROVED WORKFLOW

- Able to use ArchivesSpace as system of record
- Improved metadata accuracy
- Time savings
 - Only takes seconds to format a finding aid for upload to discovery platforms
 - 99% decrease in time to produce Virginia Heritage EAD, compared to hand-encoding
 - Generate web pages for all 340+ collections in only 20 minutes
- More staff time to dedicate to standardizing description and updating legacy finding aids
- Facilitated completion of other projects

PROJECTS FACILITATED BY IMPROVED WORKFLOW



CMS Migration to
WordPress

PROJECTS FACILITATED BY IMPROVED WORKFLOW



CMS Migration to
WordPress



Update Finding Aid
Web Pages

PROJECTS FACILITATED BY IMPROVED WORKFLOW



CMS Migration to
WordPress



Update Finding Aid
Web Pages



Aeon
Implementation

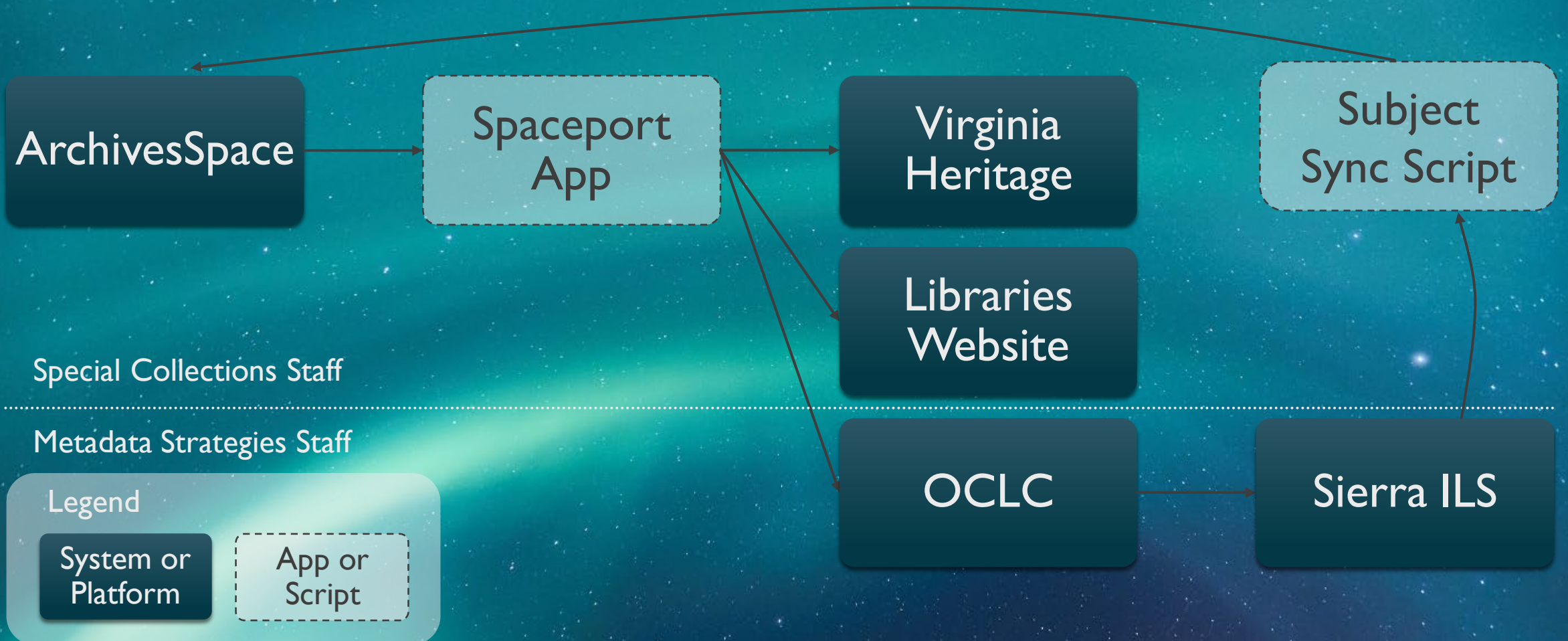
“Thankfully, hand encoding finding aids is a distant memory at this point! I can’t even imagine my life without Spaceport.”

Tiffany Cole, Special Collections Archivist

STEP 4: PYTHON SCRIPT FOR SYNCING SUBJECTS

- Currently in development
- Uses APIs for ILS and ArchivesSpace
- Subject sync script
 - Finds manuscript collection bib records that have been updated in the catalog
 - Parses LC subject headings
 - Adds any new subjects to ArchivesSpace and links them to the corresponding resource record
- Would schedule to run regularly, not requiring human intervention other than monitoring the results
- More accurate subject records in ArchivesSpace; could enhance with URIs

STEP 4: PYTHON SCRIPT FOR SYNCING SUBJECTS



STEP 5: RECORD UPLOADS VIA API

- Future step we could consider
- Uploading records to various discovery platforms doesn't involve a significant amount of work (time or difficulty) in original or current workflow, so is lowest priority for automation
- Potential to use Python scripting and APIs to automate uploads to OCLC, catalog, and/or website

BENEFITS OF INCREMENTAL AUTOMATION

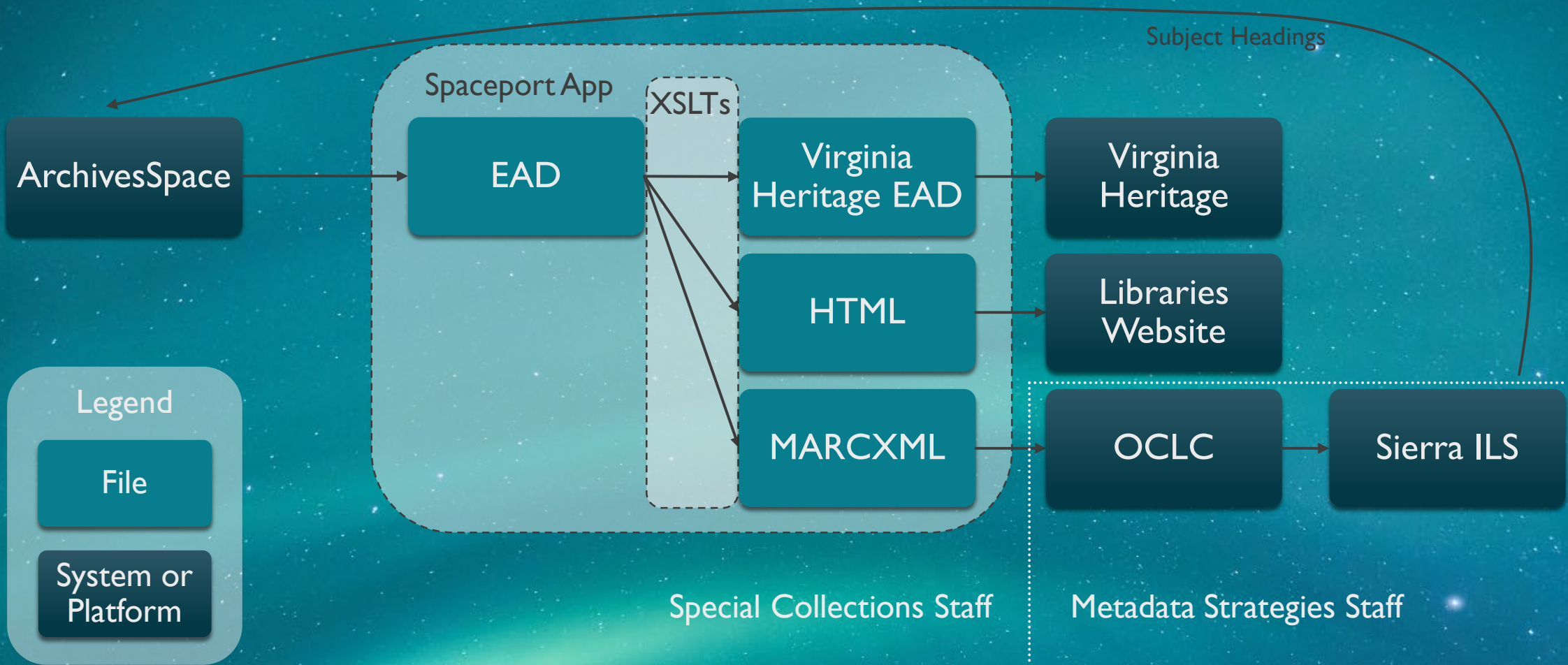
- Gradually build skills and develop new ideas that couldn't have been foreseen from the beginning
- Generate excitement and buy-in by making most impactful change first
- Easier to adjust to smaller changes
- Easier to test changes in small chunks
- Fit project work in with other priorities rather than putting it off until it could all be completed at once

“... Because it was so difficult and unwieldy to make changes across platforms, much of our description has languished for years ... Spaceport has changed all of that. We are now much more able to uphold our ethical obligations to the historical record.”

Kate Morris, Head of Special Collections

IMAGE CREDITS

- Slide background photo by [Johny Goerend](#) on [Unsplash](#)
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- [Aeon logo](#) from Atlas Systems



THANK YOU!

Rebecca B. French – frenchr@jmu.edu

Code for Spaceport: https://github.com/frenchr/JMU_ArchivesSpace