

SI 629 - Winter 2019

Access Systems for Archival Materials

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Meeting Time: Tuesdays, 5:30-8:30pm

Location: 2185 NQ

Office Hours: Tuesdays, 4:00-5:00 PM, 1278 NQ

Credits: 3

Course Description

This course examines the interactions of people, information, and technologies in the area of archives and manuscripts. It outlines and critiques assumptions about users and use, the management of descriptive programs and the practices surrounding the provision of access to and representation of archival materials, the history and theory behind these practices, the tools and technologies that enable access, and a vision for how these basic elements can work together in access systems to better provide information to users. The course will look at access tools and archival management systems as well as representations as part of an entire descriptive program that has economic, political, and cultural ramifications. Students will examine and analyze issues of effectiveness, economics, technological implementation, and audiences for different types of surrogates for primary sources including: national and subject guides, calendars, finding aids, bibliographic records (MARC), hypertext mark-up language (HTML), encoded archival description (XML/EAD), as well as images of the records themselves. Issues of content and context, appropriate levels of control, selection, and interpretation will also be studied. The course deals with the questions concerning who, what, and how.

- Who are the users of archives?
- What do archivists need to know about users' needs and what types of tools and services users want?
- What is it about the nature of archival materials (or primary sources, or records, or archives) that is different from other types of information (library books or information databases)?
- What are the unique problems in providing access to them? (Keep in mind that the term "archival materials" is defined broadly and includes analog and digital records across genres.)
- What types of evaluation should we do to assess our services and tools?
- How do archivists use finding aids, cataloging, indexing, and imaging to improve access?

- How do users employ these same tools?
- How are decisions made concerning the level and type of access, and the development of an access system?

The course combines theory with practical applications, and interactive exercises. There is considerable emphasis on emerging practices and tools. The course also covers research in areas of user and users, access systems, and descriptive practices.

Five themes dominate the course:

1. Basic concepts related to access and archives and manuscripts, mainly focusing on **information behavior and archival literacy of researchers and user needs**. This includes a review of existing access systems and search strategies.
2. **Archival representation and approaches to providing access** (accession level control, finding aids, MARC records, EAD, shared databases).
3. **Web-based applications of representations, description (by archives and by users), and how we might use engage the social web to enhance access**. Archivists work with tools for description and access at various levels (repository, collection, series, and item) and discuss descriptive standards appropriate for different levels of access. However, crowdsourcing has emerged as a promising dimension that archivists are only beginning to embrace. We will also consider how the tools and techniques presented throughout the semester can work together and how archival access methods harmonize with access systems for other types of information.
4. **Metadata and metadata transformation**. A goal in archives is to enter collections data once and then reuse it in a variety of access and management systems. That dream is not yet a reality, but learning how to work with metadata is key for administrative efficiency and use. Linked data also promises larger efficiencies and increased coordination between repositories.
5. **Thinking programmatically** is important in order to make the best decisions for collection management and use.

Assumptions / Biases

1. The nature of use and user studies

The archival profession does not understand who its users are, particularly as we move online. How do users make sense of the representations we create; how they go about locating and using archival materials? Despite this lack of understanding, archivists and archival repositories invest a great deal of time and money into archival processing, tools and systems for access. These tools were and are designed by archivists and for archivists with an assumption of mediation; e.g., that the archivist will intercede and

interpret these tools for the researcher. Human mediation (the reference archivist) between users and materials is still important, but reliance on the archivist is changing. Archives are building access systems (shared databases, online finding aids, and image databases) that allow some users to access archives with less and, in more and more cases, no interaction with the reference archivist. Mediation is solely technological. In fact, providing remote and direct access is what these tools are designed to do. (In FY 2012 National Archives served over 3 million people in person at its various research facilities, but received more than 44 million hits on the web). Therefore, we want to instill in students the desire and necessity of understanding users and use of archives and the ability to carry out user studies to address these gaps in knowledge.

2. Access ≠ Accessibility

The second issue that is relevant are our assumptions about physical access and how we define intellectual accessibility. Accessibility in this case refers not to physical issues of availability of descriptions or even images of materials, but to intellectual and cognitive accessibility. Archivists have mastered techniques of getting information (guides, images, etc.) online, but we have no real idea concerning what it takes to create representations, tools, and systems that are intellectually accessible; in other words, quantity ≠ quality.

3. Systems design and evaluation

A third concern is that archivists have conflated archival access and collection management tools. Access systems won out over collection management systems in the archival environment. However, archivists are still trying to co-opt these access systems to also serve as collection management systems. Archivists need to be savvier about the systems we are designing and promoting and the political and economic choices that have been made. This is both in terms of understanding how to design systems with clear criteria, how to evaluate and test systems with real users, and how to separate content from design issues in systems, and finally, how to design new tools for access and collections management. In short, archivists need creative new minds and solutions that “think outside the box” to address these problems. System selection, design, and evaluation need to fit into overall program objectives. Access systems, the descriptive program, and use are just three of many archival functions. Decisions in these areas must be balanced and considered in light of overall the program mission and priorities. Issues of cost, human resources, value of the materials, and a careful evaluation and understanding of the incremental benefits of applications in this area are essential.

4. The Assault on Metadata

This course has a distinct focus on archival metadata: how it is used, created, and transformed. While we realize the limitations of metadata, particularly descriptive metadata, in enabling access to archival materials, we believe there are still benefits in applying metadata. Yes, we need to think about value propositions, efforts versus effects; but if done appropriately, metadata is valuable.

Learning Objectives

At the conclusion of this course students will be able to:

- Apply current research about archival user needs and requirements to better understand the researcher's perspective and to enhance access to archival materials
- Critically assess the methods currently used to provide access to archival materials at the repository, collection, finding aid, and document level
- Use descriptive standards, such as MARC and EAD, and apply content standards, such as DACS, to archival materials
- Perform metadata transformation for archival materials
- Evaluate archival content management systems and their documentation and use selected applications to manipulate, transform, and store collection metadata
- Assess archival workflow for collections management
- Understand the importance of critical decision-making with a descriptive program (e.g., cost analyses, levels of access, personnel effort, and time considerations).

Requirements

Readings

Weekly readings are divided into sections: required readings for all students and recommended readings. The recommended readings are more research-oriented. Weekly reading assignments may also include a section called "Tools for Review." These are applications, manuals, guidelines, and / or cataloging aids that apply to the weekly topic or an assignment. You will not have to "read" these per se, but will be using them and should take the opportunity to familiarize yourself with the organization, rules, and specifics of these resources and come to class with any questions concerning their use.

Readings are available through the SI 629 course site in the **Files** section in a **Readings** folder organized by week except where indicated. Some are also linked from the syllabus.

Assignments / Evaluation

Assignment	Due Date	Grade
Assignment #1 - Searching / Retrieval Report	January 29, 2019 (week 3)	10%
Assignment #2 - MARC Record, Part 1	February 19, 2019 (week 6) March 12, 2019 (week 9)	25%

Assignment #2 - MARC Record, Part 2		
Assignment #3 - EAD Finding Aid	March 26, 2019 (week 11)	25%
Assignment #4 - Final Project -- Evaluation of an Archival Management System	March 19, 2019 (week 10) - Progress Report April 16, 2019 (week 14) - Presentations April 23, 2019 (week 15) - Project Report	25%
Class Participation	Ongoing	15%

Assignment #1 - Searching / Retrieval Report

- Oral report and write up on an archival access system

Assignment #2 - MARC Record, Part 1

- Creation of a MARC record including controlled vocabulary terminology to the MARC record

Assignment #2 - MARC Record, Part 2

- Subject analysis for MARC record and a reflection paper

Assignment #3 - EAD Finding Aid

- Encoding a finding aid in EAD XML

Assignment #4 - Final Project -- Evaluation of an Archival Management System

- Complete a group project creating a small database of collections in ArchivesSpace. Present the system and critique on the final day of class.

Class Participation

- This includes coming to class each week, completing the required readings and other background preparation, participating in class discussions in the physical classroom and online.

Original Work

Unless otherwise specified in an assignment, all submitted work must be your own, original work. Any excerpts from the work of others must be clearly identified as a quotation, and a proper citation provided. Any violation of the School's policy on Academic and Professional Integrity (stated in the Master's and Doctoral Student

Handbooks) will result in severe penalties, which might range from failing an assignment, to failing a course, to being expelled from the program, at the discretion of the instructor and the Associate Dean for Academic Affairs.

Accommodations for Students with Disabilities

The University Faculty Senate (SACUA) in 2006 endorsed the following language for inclusion on course syllabi: If you think you need an accommodation for a disability, please let me know at your earliest convenience. Some aspects of this course, the assignments, the in-class activities, and the way we teach may be modified to facilitate your participation and progress. As soon as you make me aware of your needs, we can work with the Office of Services for Students with Disabilities (SSD) to help us determine appropriate accommodations. SSD (734-763-3000; [https://ssd.umich.edu/Links to an external site.](https://ssd.umich.edu/Links%20to%20an%20external%20site.)) typically recommends accommodations through a Verified Individualized Services and Accommodations (VISA) form. I will treat any information you provide as private and confidential.

Classroom Etiquette

Students are encouraged to bring laptop computers to class and to use them actively as learning tools. Students should:

- Use laptops for taking notes, conducting research required for activities, and other specific classroom tasks as assigned by the instructor. During class, students should not check e-mail, chat, IM, play games, or perform other off-task activities.
- Engage in-class activity as actively as they would in any other class. The computer should not become a barrier to one-on-one interaction, but instead should help facilitate the exchange of ideas and engagement in classroom contact.
- Demonstrate sensitivity to others. Students should not display screen images, including wallpapers and screensavers, which might be distracting or offensive to other members of the class.

Week 1 (January 15): Introductions and Overview

- Introductions
- Course logistics
- Course objectives and requirements
- Definitions
- Why finding and using archival materials is problematic

Week 2 (January 22): Listening to Users

Lab 1 - Linux/command line crash-course and installing ArchivesSpace

- How do users approach archives and archivists?
- What are the dimensions of (re)using data originally created for other purposes?

Read 3 articles as assigned:

Group 1

Margaret Adams, "Analyzing archives and finding facts: use and users of digital data records," *Archival Science* 7/1, 2007.

Olívia Maria Gomes da Cunha, "Imperfect Tense: An Ethnography of the Archive," *Mana* vol.1 no.se Rio de Janeiro 2006.

Gail Baylis, A Few Too Many Photographs? Indexing Digital Histories, *History of Photography* 38:1 (2014): 3-20.

Group 2

Alexis Ramsey, Viewing the Archives: The Hidden and the Digital, in *Working in the Archives: Practical Research methods for Rhetoric and Composition*, edited by Alexis Ramsey, Wendy B. Sharer, Barbara L'Eplattenier, and Lisa S. Mastrangelo, Carbondale: Southern Illinois University Press, 2010: 79-90.

Durba Ghosh, "National Narratives and the Politics of Miscegenation: Britain and India," In Antoinette Burton (ed.) *Archive Stories: Facts, Fictions, and the Writing of History*. Durham: Duke University Press 2005: 27-44.

Levent Atici, Sarah Witcher Kansa, Justin Lev-Tov, and Eric C. Kansa, "Other People's Data: A Demonstration of the Imperative of Publishing Primary Data," *Journal of Archaeological Method and Theory* 20/4 (2013): 663-681

Group 3

Stephen Nissenbaum, "The Month Before the 'Night Before Christmas,'" in *Humanists at Work: Disciplinary Perspectives and Personal Reflections* Chicago: Univ. of Illinois, 1989: 43-78.

Kathleen Sheldon, "Creating an Archive of Working Women's Oral Histories," in Beira, Mozambique," in *Contesting Archives: Finding Women in the Sources*, Nupur Chaudhuri, Sherry J. Katz, and Mary Elizabeth Perry, (Eds.), Champaign, IL: University of Illinois Press, 2010: 192 – 210.

Kelly Ritter, (En)Gendering the Archives for Basic Writing Research, in *Working in the Archives: Practical Research methods for Rhetoric and Composition*, edited by Alexis Ramsey, Wendy B. Sharer, Barbara L'Eplattenier, and Lisa S. Mastrangelo, Carbondale: Southern Illinois Univ. Press, 2010: 181-194.

Recommended Reading

"Principles of Access to Archives." International Council on Archives Committee on Best Practices and Standards Working Group on Access. August 24, 2012. https://www.ica.org/sites/default/files/ICA_Access-principles_EN.pdf (Links to an external site.)Links to an external site.

Duff, Wendy M., and Catherine A. Johnson. "Accidentally Found on Purpose: Information-Seeking Behavior of Historians in Archives." *The Library Quarterly: Information, Community, Policy*, vol. 72, no. 4, 2002, pp. 472–496. www.jstor.org/stable/40039793 (Links to an external site.)Links to an external site..

Russell, D.M., M.J. Stefik, P. Pirolli, and S.K. Card. "The Cost Structure of Sensemaking," User Interface Research Area, Xerox Palo Alto Research Center, 1992.

Sachs, H.R. "Reconstructing a Life: The Archival Challenges of Women's History," *Library Trends* 56/3 (Winter 2008), pp. 650-666.

Week 3 (January 29): Current Access Systems

* Assignment Due: Assignment #1 - Searching / Retrieval Report

Lab 2 - Advanced ArchivesSpace setup and installation

- Search Strategies and Tactics
- What are the existing tools for locating primary sources?
- How should one approach searching for archival and manuscript materials?
- Where are archival representations going next?

Required Readings

The Visible Archive blog, <http://visiblearchive.blogspot.com/>Links to an external site.

Karen Drabenstott, "Web Search Strategy Development," *Online* 25/4 (2001): 18-27.

Jennifer Schaffner, *The Metadata is the Interface: Better Description for Better Discovery of Archives and Special Collections*, Synthesized from User Studies, OCLC, 2009. <https://library.oclc.org/digital/collection/p267701coll27/id/444/> (Links to an external site.)Links to an external site.

Recommended Readings

M. Daniels and E. Yakel, (2010) "Seek and You May Find: Successful Search in Online Finding Aid Systems," *American Archivist* 73/2 (Spring/Summer): 535-568.

Tibbo, Helen R. "Primarily History in America: How U.S. Historians Search for Primary Materials at the Dawn of the Digital Age." *The American Archivist*, vol. 66, no. 1, 2003, pp. 9–50. www.jstor.org/stable/40294216 (Links to an external site.)Links to an external site..

Walton, Rachel. "Looking for Answers: A Usability Study of Online Finding Aid Navigation." *American Archivist* 80/1 (Spring/Summer 2017): 30-52.

Yakel, Elizabeth. "Archival Representation." *Archival Science* 3 (2003): 1-25. <http://hdl.handle.net/2027.42/41831> (Links to an external site.)[Links to an external site.](#)

Week 4 (February 5): Systems Evaluation And Archival Collection Management Systems

*** Prep for Class: Make sure you can access ArchivesSpace on your computer**

- Systems evaluation
- Workflow processes

Required Readings

Dan Santamaria, *Designing Descriptive and Access Systems*, Society of American Archivists, 2013.

Lisa Spiro, "Archival Description and Management Tools," Washington, D.C.: Council on Library and Information Resources, 2008.

Wiki: <http://archivalsoftware.pbworks.com/>[Links to an external site.](#) Report: (especially How to Select and

Criteria: <http://archivalsoftware.pbworks.com/w/page/13600255/How%20to%20SelectLinks%20to%20an%20external%20site>.

Sibyl Schaeffer, Challenges in Sustainable Open Source: A Case Study, *code4lib* 9 (2010), <http://journal.code4lib.org/articles/2493>[Links to an external site.](#)

Canadian Heritage Information Network, Collections Management Software Criteria Checklist, 2012 <https://www.canada.ca/en/heritage-information-network/services/collections-management-systems/software-criteria-checklist.html> (Links to an external site.)[Links to an external site.](#)

Recommended Readings

ArchivesSpace @ Yale blog <https://campuspress.yale.edu/yalearchivesspace/>

Alexander Duryee, "Implementing ArchivesSpace at NYPL: Part 1," March 8, 2017, <https://www.nypl.org/blog/2017/03/08/implementing-archivesspace-nypl-part-1> (Links to an external site.)[Links to an external site.](#)

Alexander Duryee, "Implementing ArchivesSpace at NYPL: Part 2," January 19, 2018, <https://www.nypl.org/blog/2018/01/19/implementing-archivesspace-nypl-part-2> (Links to an external site.)[Links to an external site.](#)

Lisa Calahan & Kate Dietrick, "Setting the Stage and Keeping Sane: Implementing ArchivesSpace at the University of Minnesota," *Journal of Archival Organization* Vol. 13 Nos. 3-4 (2016): 114-126.

Tools for Review

- Archivist's Toolkit – <http://archiviststoolkit.org>[Links to an external site.](#)
- Archon – <http://www.archon.org>[Links to an external site.](#)

- Calm – <http://alm.axiell.com/collections-management-solutions/technology/calm-archive/> (Links to an external site.)Links to an external site.
- Collective Access – <http://www.collectiveaccess.org/>Links to an external site.
- Cuadra STAR Knowledge Center for Archives (SKCA) - <https://lucidea.com/cuadrastar-skca/> (Links to an external site.)Links to an external site.
- Eloquent Systems, Eloquent Archives - <http://www.eloquent-systems.com/products/archives/> (Links to an external site.)Links to an external site.
- AToM (Access to Memory) - <https://www.accesstomemory.org/en/> (Links to an external site.)Links to an external site.
- [Links to an external site.](#)PastPerfect – <http://www.museumsoftware.com/>Links to an external site.

Week 5 (February 12): Surrogates for Archival Collections: DACS & MARC

- Data Structure, Data Content, and Data Value Standards
- Core Descriptive Elements

Required Readings

Describing Archives: A Content Standard, 2nd Edition. Society of American Archivists, 2013. http://files.archivists.org/pubs/DACS2E-2013_v0315.pdfLinks to an external site. Read: pp. xv-xix; 3-84.

Sibyl Schaefer and Janet Bunde, *Standards for Archival Description*, Society of American Archivists, 2013.

Understanding MARC Bibliographic: Machine Readable Cataloging, <https://www.loc.gov/marc/umb/> (Links to an external site.)Links to an external site.

Tools for Review

MARC Documentation, <http://www.loc.gov/marc/>Links to an external site.

Rules for Archival Description, <http://www.cdncouncilarchives.ca/archdesrules.html>Links to an external site.

International Council on Archives, General International Standard Archival Description (ISAD(G)), https://www.ica.org/sites/default/files/CBPS_2000_Guidelines_ISAD%28G%29_Second-edition_EN.pdf (Links to an external site.)Links to an external site.

Recommended Readings

Wendy Duff and Penka Stoyanova, "Transforming the Crazy Quilt: Archival Displays from a Users' Point of View," *Archivaria* 45 (Spring 1998): 44-79.

Jennifer Meehan, "Making the Leap from Parts to Whole: Evidence and Inference in Archival Arrangement and Description," *American Archivist* 72/1 (Spring/Summer 2009): 72-90.

Week 6 (February 19): Access By Subject, Function, Form, & Genre

* Assignment Due: Assignment #2 - MARC Record, Part 1

- Controlled vocabulary
- Advantages and problems of subject access to archival materials
- Form & genre as access points

Required Readings

Michelle Mascaro, "Controlled Access Headings in EAD Finding Aids: Current Practices in Number of and Types of Headings Assigned," *Journal of Archival Organization*, 9:3-4 (2011): 208-225.

Diane Beattie, "Retrieving the Irretrievable: Providing Access to Hidden Groups in Archives," in Laura B. Cohen, ed. *Reference Services for Archives and Manuscripts*, Haworth, 1997: 83-94.

Clay Shirky, "Ontology is Overrated: Categories, Links, and Tags," (2005) http://www.shirky.com/writings/ontology_overrated.html [Links to an external site.](#)

Recommended Readings

Helen Tibbo, "The Epic Struggle: Subject Retrieval from Large Bibliographic Databases," *American Archivist* 57 (Spring 1994): 310-326

Tools for Review

Getty Tools: Thesaurus for Geographic Names (TGN), Union List of Artists Names (ULAN), Art and Architecture Thesaurus (AAT)

- <http://www.getty.edu/research/tools/vocabularies/index.html> ([Links to an external site.](#)) [Links to an external site.](#)

Library of Congress Authorities, <http://authorities.loc.gov/> [Links to an external site.](#)

Library of Congress, Prints and Photographs Division, Thesaurus for Graphic Materials, Washington, D.C.: Library of Congress, Cataloging Distribution Service, 1995. 2nd edition.

TGM 1: Application Guidelines; <http://www.loc.gov/rr/print/tgm1/toc.html> [Links to an external site.](#)

TGM 2: Genre and Physical Characteristic

Terms; <http://www.loc.gov/rr/print/tgm2/toc.html> [Links to an external site.](#)

Week 7 (February 26): Encoded Archival Description (EAD)

- Discussion of reflection questions in the assignment
- Evolution and current status of EAD
- EAD Applications

- Related encoding standards

Required Readings

Katherine Wisser and Jackie Dean, "EAD Tag Usage: Community Analysis of the Use of Encoded Archival Description Elements," *American Archivist* 76/2 (2013): 299-301.

Janice Ruth, "Encoded Archival Description: A Structural Overview," *American Archivist* 60:3 (Summer 1997): 310-329.

Dennis Meissner, "First Things First: Reengineering Finding Aids for Implementation of EAD," *American Archivist* 60/4 (Fall 1997): 372-387.

Recommended Readings

Heather McNeil, "What finding aids do: archival description as rhetorical genre in traditional and web-based environments," *Archival Science* 12 (2012):485–500.

Tools for Review

EAD Official Website, <http://www.loc.gov/ead/Links to an external site.>

EAD Version 2002 Tag Library, <http://www.loc.gov/ead/tqlib/index.htmlLinks to an external site.>

OAC Best Practice Guidelines for EAD (OAC BPG EAD), Maintained by the California Digital Library, Version 2.0, April

2005. [https://help.oac.cdlib.org/support/solutions/articles/9000103649-oac-best-practice-guidelines-for-ead \(Links to an external site.\)Links to an external site.](https://help.oac.cdlib.org/support/solutions/articles/9000103649-oac-best-practice-guidelines-for-ead (Links to an external site.)Links to an external site.)

Week 8 (March 5): Spring Break (No Class)

Work on Part 2 of MARC and EAD assignments, but mostly, enjoy yourself and the time off!

Week 9 (March 12): EAD (continued)

* Assignment Due: Assignment #2 - MARC Record, Part 2

- EAD Wrap up
- EAD Stylesheets
- EAD Implementation and Delivery

Required Readings

XSLT Tutorial (**archived version**), <http://web.archive.org/web/20161014090016/http://www.w3schools.com/xsl/default.aspLinks to an external site.>

Michele Combs, Mark A. Matienzo, Merrilee Proffitt, and Lisa Spiro, *Over, Under, Around, and Through: Getting Around Barriers to EAD Implementation*. OCLC Research,

2010. <https://www.oclc.org/content/dam/research/publications/library/2010/2010-04.pdf> (Links to an external site.)Links to an external site.

Gartner, Richard. "Metadata for digital libraries: state of the art and future directions," JISC Technology and Standards Watch, April 2008.

Amy McCrory and Beth M. Russell, "Crosswalking EAD: Collaboration in Archival Description," *Information Technology and Libraries* 2005: 99-106.

Gregory Wiedeman, "XQuery for Archivists: Understanding EAD Finding Aids as Data," *Practical Technology for Archives* 3 (November 2014), https://practicaltechnologyforarchives.org/issue3_wiedeman/ (Links to an external site.)Links to an external site.

Kate Dietrick, Lara Friedman-Shedlov, and Caitlin Marineau, "A Long and Twisted Road: The Journey from EAD to ArchivesSpace Implementation at the University of Minnesota," *Journal of Archival Organization* Vol. 16 Nos. 3-4 (2016): 90-99.

Week 10 (March 19): Context And Representing Provenance

* Assignment Due: Final Project Check-In

- Provenance, Authority Control, and Context Control
- International Standard Archival Authority Record for Corporate Bodies, Persons, and Families (ISAAR)
- Encoded Archival Context (EAC)
- MADS (Metadata Authority Description Schema)
- ICA-ISDF, International Standard for Describing Functions

Required Readings

DACS2, 2013: pp. 87-126. http://files.archivists.org/pubs/DACS2E-2013_v0315.pdf (Links to an external site.)Links to an external site.

Ray R. Larson and Krishna Janakiraman, "Connecting Archival Collections: The Social Networks and Archival Context Project," *Research and Advanced Technology for Digital Libraries, Lecture Notes in Computer Science*, 2011, Volume 6966/2011: 3-14

Adrian Cunningham, "Harnessing the Power of Provenance in Archival Description: An Australian Perspective on the Second Edition of ISAAR (CPF)," *J of Archival Organization* 5/1-2 (2008): 15-31.

Max J. Evans, "Authority Control: An Alternative to the Record Group Concept," *American Archivist* 49 (Summer 1986): 249-61.

Gavan McCarthy, Engineering Utility: A Visionary Role for Encoded Archival Authority Information in Managing Virtual and Physical Resources, Paper presented at AusWeb99, the Fifth Australian World Wide Web Conference, Lismore NSW. [\(Links to an external site.\)Links to an external site.](#)Links to an external site.

Szaray, Richard V. "Encoded Archival Context (EAD) and Archival Description: Rationale and Background," *Journal of Archival Organization*, Vol. 2 No. 2/3, 2005, pp. 217-227.

Recommended Readings

Katherine M. Wisser, "Investigating the 'small world' of literary archival collections: the impact of EAC-CPF on archival descriptive practices - Part 1: Relationships, description and the archival community," *Journal of Contemporary Archival Studies* Vol. 2, Article 1.

Tools for Review

International Council on Archives, ISAAR (CPF): International Standard Archival Authority Record for Corporate Bodies, Persons, and Families, Draft Second Edition, October 2003

https://www.ica.org/sites/default/files/CBPS_Guidelines_ISAAR_Second-edition_EN.pdf (Links to an external site.)Links to an external site.

Encoded Archival Context: <http://eac.staatsbibliothek-berlin.de/>Links to an external site.
Metadata Authority Description Schema (MADS), <http://www.loc.gov/standards/mads/>Links to an external site.

ICA-ISDF, International Standard for Describing Functions

https://www.ica.org/sites/default/files/CBPS_2007_Guidelines_ISDF_First-edition_EN.pdf (Links to an external site.)Links to an external site.

Week 11 (March 26): Linked Open Data (LOD)

* Assignment Due: Assignment #3 - EAD Finding Aid

- Linked Open Data
- Metadata Reuse and Transformation
- Interoperability

Required Readings

Tim Berners-Lee, TED Talk, Linked Open Data, http://www.ted.com/talks/tim_berniers_lee_on_the_next_webLinks to an external site.

Eric Lease Morgan and LiAM, *Linked Archival Metadata: A Guidebook*, version 0.99. April 23, 2014

Jennifer Bowen, "Moving Library Metadata toward Linked Data: Opportunities Provided by the eXtensible Catalog," *Proceedings of the International Conference on Dublin Core and Metadata Applications 2010*: 44-59.

Bernhard Haslhofer, Elaheh Momeni, Manuel Gay, and Rainer Simon, "Augmenting Europeana Content with Linked Data Resources." *Proceedings of the 6th International*

Conference on Semantic Systems, 2010, pp. 40:1–3. New York, NY, USA: ACM.
doi:10.1145/1839707.1839757

Godby, Carol Jean and Karen Smith-Yoshimura, "From Records to Things: Managing the Transition from Legacy Library Metadata to Linked Data." *ASIS&T Bulletin*, 2017 <https://www.asist.org/publications/bulletin/decemberjanuary-2017/from-records-to-things-managing-the-transition-from-legacy-library-metadata-to-linked-data/> (Links to an external site.)[Links to an external site.](#)

Ruth Kitchin Tillman, "Opportunities for Encoding EAD for Linked Data Extraction and Publication," *Journal of Archival Organization* Vol. 16 Nos. 1-2 (2016).

Recommended Readings

DPLA Archival Description Working Group, "Aggregating and Representing Collections in the Digital Public Library of America," November 2016. https://docs.google.com/document/d/16r_px4GajLIOZMlyXyN0pJFfWpstJIKxHF3brgM4Y0o/edit (Links to an external site.)[Links to an external site.](#)

Linked Open Data in Libraries, Archives, and Museums Summit ("LOD-LAM"), <http://lodlam.net/>[Links to an external site.](#)

Linked Open Data, Use

Cases, <http://www.w3.org/2005/Incubator/lld/wiki/UseCaseReport> (Links to an external site.)[Links to an external site.](#)

Voss, "An Introduction to Linked Open Data in Libraries, Archives & Museums," Presented at LODLAM 2011, Washington, DC. <http://lodlam.net/2011/09/15/intro-to-lodlam-talk-live-from-the-smithsonian/> (Links to an external site.)[Links to an external site.](#)

Sören Auer, Christian Bizer, Georgi Kobilarov, Jens Lehmann, and Zachary Ives, "Dbpedia: A Nucleus for a Web of Open Data," *Proceedings of the 6th International Semantic Web Conference*, Busan, Korea, 2007: 722-735.

Week 12 (April 2): Operational Data and Systems Integration

Required Readings

Melanie Griffin, Barbara Lewis, Mark I. Greenberg (2013). Data-Driven Decision Making: An Holistic Approach to Assessment in Special Collections Repositories. *Evidence Based Library And Information Practice*, 8(2), 225-238.

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from <http://ejournals.library.ualberta.ca/index.php/EBLIP/article/view/19138>[Links to an external site.](#)

Chris Prom "Using Web Analytics to Improve Online Access to Archival Resources," *American Archivist* 74/1 (2011): 158-184

Processing Metrics Collaborative: Database Development Initiative, <https://wiki.med.harvard.edu/Countway/ArchivalCollaboratives/ProcessingMetricsDatabase>[Links to an external site.](#)

Lily Todorinova, Barbara Lewis, Andy Huse, and Matt Torrence, "Making Decisions: Using Electronic Data Collection to Re-Envision Reference Services at the USF Tampa Libraries," University of South Florida Scholar Commons, (2011): http://scholarcommons.usf.edu/cgi/viewcontent.cgi?article=1049&context=tlas_p [ubLinks to an external site.](#)

Recommended Readings

Duff, Wendy M., Elizabeth Yakel, Helen R. Tibbo, Joan M. Cherry, Aprille McKay, Magia G. Krause, and Rebecca Sheffield. "The Development, Testing and Evaluation of the Archival Metrics Toolkits," *American Archivist* 73 (Fall/Winter 2010): 568-599.

Dupont, Christian and Elizabeth Yakel. "'What's So Special about Special Collections?' Or, Assessing the Value Special Collections Bring to Academic Libraries," *Evidence Based Library and Information Practice* 2013, 8.2: 9-21.

Gustainis, Emily R. Novak. "Processing Workflow Analysis for Special Collections: The Center for the History of Medicine, Francis A. Countway Library of Medicine as Case Study," *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage*, 2012 pp. 113-128.

Joyce Chapman and Elizabeth Yakel, "Data-driven Management and Interoperable Metrics for Special Collections and Archives User Services," *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage*, 13/2 (2012): 129-151.

SAA-ACRL/RBMS Joint Task Force on the Development of Standardized Statistical Measures for Public Services in Archival Repositories and Special Collections. "Standardized Statistical Measures and Metrics for Public Services in Archival Repositories and Special Collections Libraries," Version 3, 2017. <https://www2.archivists.org/sites/all/files/Public%20Services%20Measures%20and%20Metrics%20-%20Version%203%20-%20Final%20Draft%20-%20with%20corrections%20170813.pdf> ([Links to an external site.](#))[Links to an external site.](#)

Welch, Jeanie M. "Who says we're not busy? Library web page usage as a measure of public service activity," *Reference Services Review*, 33/4, 2005, pp. 371-379.

Ryan K. Lee, Cory L. Nimer, J. Gordon Daines III, and Shelise Rupp, "Using Google Analytics, Voyant and Other Tools to Better Understand Use of Manuscript Collections at L. Tom Perry Special Collections," *Practical Technology for Archives* Issue 7 (2017), https://practicaltechnologyforarchives.org/issue7_lee/

Kathryn Hujda, Caitlin Marineau, & Amanda Wick, "Maximum Product, Even Less Process: Increasing Efficiencies in Archival Processing Using ArchivesSpace," *Journal of Archival Organization* Vol. 13 Nos. 3-4: 100-113.

Max Eckard and Dallas Pillen, "Case study: Streamlining digital archiving workflows at the Bentley Historical Library." *Journal of Digital Media Management* 6/1: 1-13. <https://deepblue.lib.umich.edu/handle/2027.42/139043>

Tools for Review

Atlas Aeon - <https://www.atlas-sys.com/aeon/> (Links to an external site.)[Links to an external site.](https://www.atlas-sys.com/aeon/)

DeskTracker- <http://www.compendiumlib.com/desk-tracker/> (Links to an external site.)[Links to an external site.](http://www.compendiumlib.com/desk-tracker/)

Libstats – <http://code.google.com/p/libstats>[Links to an external site.](http://code.google.com/p/libstats)

LibInsight - <https://www.springshare.com/libinsight/> (Links to an external site.)[Links to an external site.](https://www.springshare.com/libinsight/)

Week 13 (April 9): State of the Art / Future Directions of Archival Access

- Archives 2.0: Use of social media, Crowdsourcing, Mobile apps
- Authority and control
- User-centered design

Required Readings

Elizabeth Yakel, “Balancing Archival Authority with Encouraging Authentic Voices to Engage with Records,” *A Different Kind of Web: New Connections between Archives and Our Users with Web 2.0*, Kate Theimer, ed. Chicago: SAA, 2011: 75-101.

Joy Palmer and Jane Stevenson, “Something Worth Sitting Still For? Some Implications of Web 2.0 for Outreach,” *A Different Kind of Web: New Connections between Archives and Our Users with Web 2.0*, Kate Theimer, ed. Chicago: SAA, 2011: 1-21.

Group 1:

Adam Kriesberg, “Increasing Access in 140 Characters or Less: Or, What Are Archival Institutions Doing on Twitter?” *American Archivist* 77/2 (Fall/Winter 2014): 534–557.

Ann Lally and Carolyn Dunford, “Using Wikipedia to Extend Digital Collections,” *D-Lib Magazine* 13/5/6 (May/June 2007). <http://www.dlib.org/dlib/may07/lally/05lally.html> (Links to an external site.)[Links to an external site.](http://www.dlib.org/dlib/may07/lally/05lally.html)

Group 2:

Patrick Peccatte (translated by Lynne Thomas), “Liberating Archival Images: The Photos Normandie Project on Flickr,” *A Different Kind of Web: New Connections between Archives and Our Users with Web 2.0*, Kate Theimer, ed. Chicago: SAA, 2011: 148-158.

Carmen Mitchell and Daniel Suchy, “Developing Mobile Access to Digital Collections,” *D-Lib magazine* 18/1-2 (2012) <http://www.dlib.org/dlib/january12/mitchell/01mitchell.html>[Links to an external site.](http://www.dlib.org/dlib/january12/mitchell/01mitchell.html)

Heather Willevar Farr and Andrea Forte, "Family Matters: Control and Conflict in Online Family History Production," Computer Supported Cooperative Work (CSCW), February 15-19, 2014, Baltimore, MD.

Group 3:

Caroline Daniels, Terri L. Holtze, Rachel I. Howard, and Randy Kuehn, "Community as Resource: Crowdsourcing Transcription of an Historic Newspaper," *Journal of Electronic Resources Librarianship* 26:1, (2014): 36-48, DOI: 10.1080/1941126X.2014.877332

Mary Flanagan and Peter Carini, "How Games Can Help Us Access and Understand Archival Images," *American Archivist* 75/2 (2012): 538-566.

Recommended Readings

Michele Combs, "Wikipedia as an access point for manuscript collections." Case Study for SAA Archives & Web 2.0 Book.

Guy Grannum, "Harnessing user knowledge: The "Your Archives" wiki." Case Study for SAA Archives and Web 2.0 book.

Wendy M. Duff, Catherine A. Johnson, and Joan M. Cherry, "Reaching Out, Reaching In: A Preliminary Investigation into Archives' Use of Social Media in Canada," *Archivaria* 75 (2013): 77-96.

Karen Smith-Yoshimura, Carol Jean Godby, Helice Koffler, Ken Varnum, Elizabeth Yakel, *Social Metadata for Libraries, Archives and Museums Part 2: Survey Analysis*. Dublin, Ohio: OCLC Research, 2011. <http://www.oclc.org/research/publications/library/2012/2012-01r.html> ([Links to an external site.](#))[Links to an external site.](#)

[\(Links to an external site.\)Links to an external site.](#)Michelle Light and Tom Hyry, "Colophons and Annotations: New Directions for the Finding Aid." *American Archivist* 65/2 (Fall/Winter 2002): 216-230.

<http://americanarchivist.org/doi/pdf/10.17723/aarc.65.2.l3h27j5x8716586q>[Links to an external site.](#)

Tools for Review

ArcLight

Review the ArcLight demo application at: <https://arclight-demo.projectblacklight.org> ([Links to an external site.](#))[Links to an external site.](#)

[\(Links to an external site.\)Links to an external site.](#)Review project overview at: <https://wiki.duraspace.org/display/samvera/ArcLight> ([Links to an external site.](#))[Links to an external site.](#)

[\(Links to an external site.\)Links to an external site.](#)Review design process information, particularly "Personas" in the ArcLight Information Architecture Phase 1 page, at: <https://wiki.duraspace.org/display/samvera/ArcLight+Design+Process> ([Links to an external site.](#))[Links to an external site.](#)

Library of Congress By the People: <https://crowd.loc.gov> ([Links to an external site.](#))[Links to an external site.](#)

Week 14 (April 16): Student Team Presentations & Wrap-Up

- Presentations
- Wrap-Up

Week 15 (April 23): Final Project Report Due (No Class)

*** Assignment Due: Assignment #4 - Final Project -- Evaluation of an Archival Management System**