

[SLIDE of introduction]

My name is Eira Tansey, and I have been working at the Louisiana Research Collection since summer 2008. My main responsibilities include arranging and describing collections, writing finding aids and other similar processing activities. I also train and supervise similar work done by student workers and interns. Over the last year, one of my major responsibilities has been the migration of legacy finding aids into Archon.

Archon is a software program designed by archivists from the University of Illinois-Champaign. It is used to publish finding aids online. It is similar to Archivists Toolkit but has many differences. Although it takes some technical ability to install it, once it is up it is fairly easy to learn. I have trained student workers to use Archon in less than 2 hours. You do not need to know encoded archival description to use Archon, although you can harvest EAD files from finding aids created in Archon. There are current plans to merge Archon and Archivists Toolkit, which will result in a new program called ArchivesSpace, projected to be ready sometime between 2011-2012.

[SLIDE of LaRC home page]

The Louisiana Research Collection at Tulane University is one of the largest Louisiana research libraries and special collections. The Louisiana Research Collection, or LaRC, has numerous publications, serials, maps, image files, vertical files and archival collections including possibly the largest nineteenth-century Louisiana library extant. Our archival holdings are very strong in the areas of women's and charitable organizations, Louisiana politics, Jewish studies and the Civil War. Our department is part of the Special Collections of Tulane's main research library, Howard-Tilton Memorial Library.

[SLIDE of reading room binders]

In 2008, all of our finding aids were still being created in Microsoft Word. They were printed out and put in binders in our reading room, pictured on this slide. A handful of finding aids existed on our website, but these were marked up in HTML, and not EAD. Other than the handful online, the only way researchers could access our finding aids was to come to Tulane, or contact us to request a copy. Although we sometimes had recent Word versions of finding aids, most of our finding aids did not have any kind of digital version. I began scanning any requested paper-based finding aids as OCR'd PDFs, and saved a permanent copy on our shared network drive that could be retrieved later.

[SLIDE of card catalog]

In the past, subject and collection catalog cards were created and placed in the old card catalog which to this day is still used in our reading room. A manuscripts cataloging librarian came to LaRC in 2008 to perform original MARC cataloging for our collections. Our MARC cataloging only covers basic collection level information and until Archon was implemented, referred patrons to contact staff for a copy of the finding aid. Although these collection-level MARC

records began to make our holdings more accessible since they were now showing up in our OPAC and WorldCat, discovery of collections and their contents remained very limited. Clearly a change was needed, and we started exploring ways to facilitate finding aid access over the web.

[SLIDE of my census notepads]

Compounding the problem was the fact that out of over 1000 manuscripts collections, a significant number did not have any kind of finding aid whatsoever. Our department has been around for sixty years, and a wide variety of standards applying to arrangement and description has proliferated during our existence. Furthermore, we had no consistent list of which collections had usable finding aids. Finally, some collections had preliminary inventories created during acquisition that were only in our internal accession files, but these were never fully developed into public finding aids.

I began by taking a complete audit of every single collection, whether it had a finding aid, and the quality of each one. This process took several months over the course of 2009. Finding aids ranged in detail from entire published catalogs with item level descriptions to one page box level inventories. Finding aids also varied in accuracy, as many had never been updated to reflect accruals.

I collected all initial data on notepads, and later logged it in Excel. All collections were first recorded as having a finding aid or no finding aid. If a finding aid existed, the quality was then examined. This was a subjective process, but finding aids were generally classified as “in progress” for collections currently being processed, “ready to go” for collections where the finding aid was more or less free of errors and consistent with the housing of the collection, “minor work needed” if some small problems existed such as an accrual of 1 box not reflected in the current finding aid, or “major work needed” for finding aids that existed, but required major updates in order to be thought of as useful.

[SLIDE of spreadsheet]

After the audit was completed and the data was plugged in to a spreadsheet, we had a much better idea of how much work we faced and how we might migrate our legacy finding aids online.

[SLIDE of audit results]

The survey found the following of our processed manuscript collections:

- Ready to go finding aids: 380 total, or 40% of our collections
- Minor work needed finding aids: 138 total, or 14% of our collections
- Major work needed finding aids: 55 total, or 6% of our collections
- Collections without finding aids (“nothing”): 375 total, or 40% of our collections

Around this time we also began temporarily putting any requested finding aids that had been scanned as OCR'd PDFs on our website. This was met with some success as these finding aids were for some of our most heavily used collections. However it was clear that this had very limited functionality and would be only a temporary fix

Between late 2008 and early 2009, two New Orleans archives began to use Archon: the Touro Infirmary Archives and the Amistad Research Center. The Touro Infirmary archivists demonstrated Archon at the winter 2008 meeting of the Greater New Orleans Archivists. The Amistad Research Center, which like us did not have any kind of encoded finding aids, selected Archon to migrate their finding aids online. As we considered beginning to use Archon late last summer (summer 2009), I met with staff member Laura Thompson who demonstrated the software to me. I also contacted Amy Schindler of William and Mary after finding their presentation slides on the "Archon Ultimatum" online. William and Mary had a very similar situation to ours in terms of being an old department, number of collections, varying quality of finding aids and small staff. William and Mary, instead of rekeying their finding aids entirely, including box and folder listings, attached PDFs of the inventory to basic Archon collection records. Afterward, they prioritized which finding aids warranted complete rekeying. The Louisiana Research Collection has ultimately adopted a similar method for our implementation of Archon.

[SLIDE of Archon]

Working with Tulane's IT department, we requested an instance of Archon to be set up for Special Collections. Although only the Louisiana Research Collection was the initial user, we wanted the other Special Collections departments on campus to be able to use it in the future if they desired.

I spent the next several weeks learning how to use Archon, and writing basic guides for our staff and students. The Amistad Research Center provided me with a copy of their guide to Archon, which I significantly adapted for our purposes and needs.

[SLIDE of rekeyed Archon finding aid]

I then began training students on how to use Archon, including complete re-keying of finding aids. This is a completely rekeyed finding aid, with links to box and folder listings.

[SLIDE of rekeyed Archon finding aid, part 2 with box and folder listings]

Clicking on the box links takes you to a complete folder listing in a fully rekeyed finding aid.

At the same time I began developing a plan for how we might get all of the "ready to go" and "minor work needed" finding aids in Archon. It became clear that even with our wonderful student workers, completely rekeying the box and folder listings of each finding aid was a luxury we could not afford. So we began to implement what I now call the quick and dirty method.

[SLIDE of workflow]

For any collections that were already had MARC records (about 8-10% of the regular manuscripts collections) we imported the MARC record into Archon, did some data cleanup, added boiler plate language regarding access and citations, scanned the legacy finding aid and attached the file with a note to the collection level record so patrons could access the box and folder inventory. I trained our student workers to perform most of these steps, and assigned them new collections to input each week. After they completed them, I created subject headings and creator authorities based on the MARC record, approved the collection record for public viewing, and created a staff-view only accompanying accession record.

[10 minute mark]

After doing this for a few months, we had input nearly all the MARC cataloged collections. I began to prioritize non-MARC cataloged collections for Archon input. Once a collection was entered in Archon with basic descriptive information, we sent the information to our cataloging librarian, who cataloged the collection in Voyager/WorldCat with a direct link to the Archon finding aid and assigned subject headings and creator authorities, which were added to the Archon record later.

[SLIDE of Archon finding aid with link to PDF]

This is what one of our quick and dirty Archon records look like, with a link to the PDF which has the box and folder listings for the collection.

[SLIDE of record groups listing]

My original plan was to have the majority of our collections represented in Archon by the end of 2010. As staffing resources have changed, we have had to reassess this timeline and explore other alternatives. As of August 2010, we now have almost 100 legacy finding aids in Archon. In addition, all finding aids for newly processed collections are now being created in Archon. The migration of legacy finding aids was carried out with 1 staff member [myself] and several student workers working 10-15 hours a week. Our cataloging librarian also performed some additional authorities and subject heading work inside Archon.

Implementing Archon has led to many positive results. We are no longer the only Special Collections unit using Archon, and the Hogan Jazz Archive at Tulane has begun using it as well. We have seen an increased number of reference questions and queries because of Archon, since many people will google something, arrive directly at the applicable record in Archon, and email us to find out more.

We are currently in a transitional period with Archon. We're hoping within the next year to develop our own visual theme so we no longer have to use the default view of Archon. Another exciting development is we are negotiating a contract for a third party vendor to perform legacy

finding aid data migration. All of our major collections should have online finding aids within two years.

[FINAL SLIDE]

While researchers who visit us on site will still have to pull down the finding aid binders and search the old-school card catalog for some time, we have taken a great leap forward towards making our legacy collection information more accessible. Implementing Archon has not been without its challenges, however we have made a lot of progress in the first year since beginning to use it. The key has been to continue to be flexible, develop internal practices as needed, and be realistic about what can be achieved with limited staff resources and large goals. “unqualified success”

Southern Archives Conference 2010, Eira Tansey panel presentation

- What the LaRC finding aid situation was when I arrived at Tulane
 - Card catalog, binders, Voyager/World Cat, a handful online (but in HTML, not EAD)
- Needed to get a handle on how many finding aids actually existed and in what form
 - Census of collections - breakdown of no finding aid (“Nothing”)/finding aid
 - For existing finding aids, using a subjective measurement of “Ready to go”, “Minor work needed”, “Major work needed” to designate finding aids
 - [Share what the breakdown was]
- Confluence of activities that led us to Archon
 - We had already begun putting some finding aid PDFs online, but this had limited functionality
 - Touro Infirmary Archives
 - Amistad Research Center
 - Found William and Mary’s Archon Ultimatum, long interview with Amy Schindler
 - Took the plunge late last summer
- Talk about my initial draft plan for how I thought I was going to get everything in over the course of a couple years
 - Obviously this demonstrates the need to stay flexible
 - Reliance on student workers
 - Staff constraints - just me, basically
 - Given all of these limitations, how can we use Archon on an expanded scale?
- The Quick and Dirty method aka Archon MPLP
 - re-keyed finding aids was a luxury we could not afford except with very important finding aids
 - Provide a basic collection level record
 - Scan in all the “ready to go” finding aids as PDFs - OCR whenever possible
 - Upload the PDF to the collection record with a note directing users where to find the box list
 - All new finding aids are completely created in Archon
 - Our current workflow for legacy and new finding aids
- Results
 - Increased reference requests
 - Sign on from Jazz Archives
 - Number of finding aids over the course of 9 or so months using just 1 staff member (me) and 3 student workers