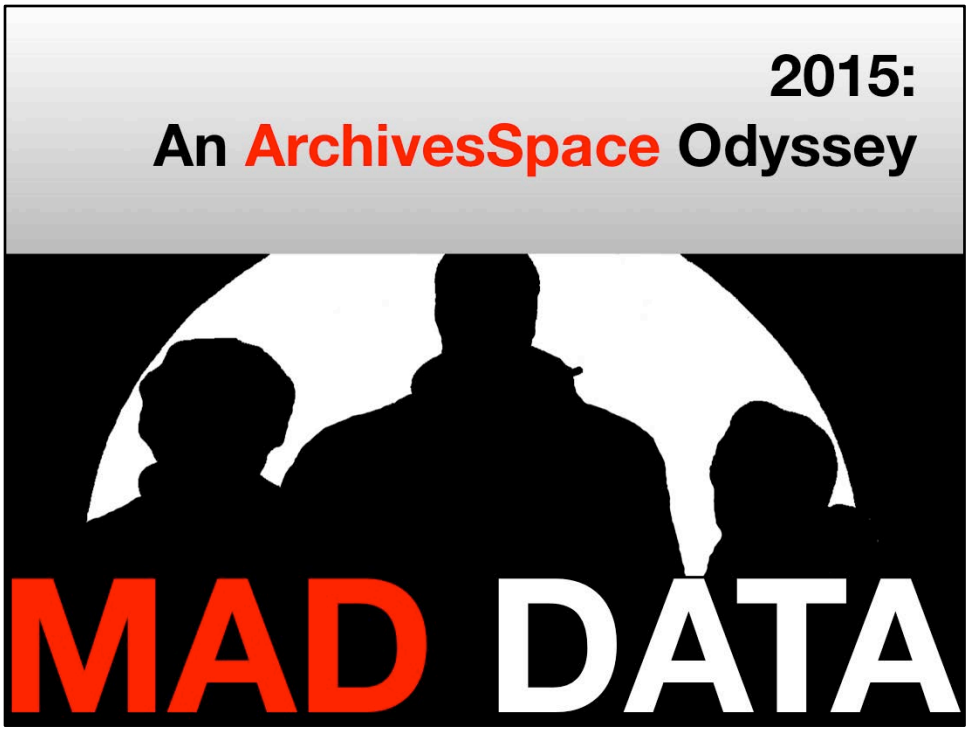
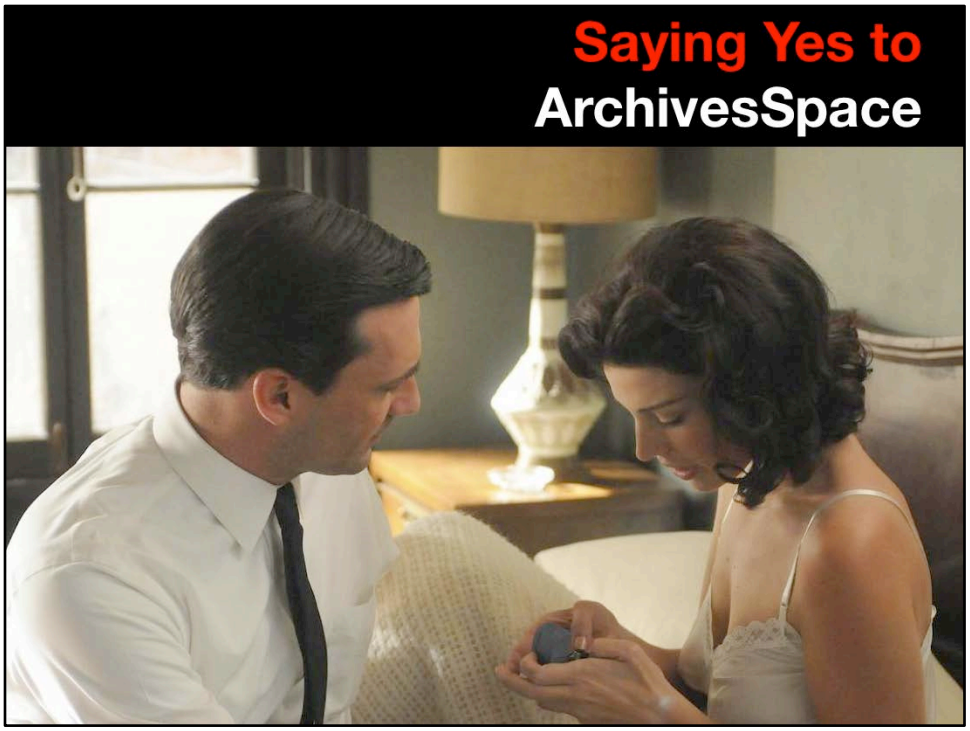


Image: http://www.wired.com/images_blogs/underwire/2013/04/madspace1.jpg

Last Spring, the Reuther Library decided to transition its archival content management system to ArchivesSpace. This was based on several factors:

- Our current content management system, FileMaker Pro, was no longer going to be supported internally:
- While meeting our needs when it was initially designed and created over 10 years ago, the staff member who created it has since left, and our needs have changed, as has technology.
- We also wanted a system that could combine the multiple FileMaker Pro databases we were using for our content management needs, which included:
    1. Accessions Database that contained our more recent and current accessions records
    2. Collections Database- primarily contains records for processed collections, although it also contained some accession records.
    3. Processing Worksheet Database that contains records for each collection that is processed. It documents metrics and data such as all accessions making up the processed collection, total time spent processing, etc.

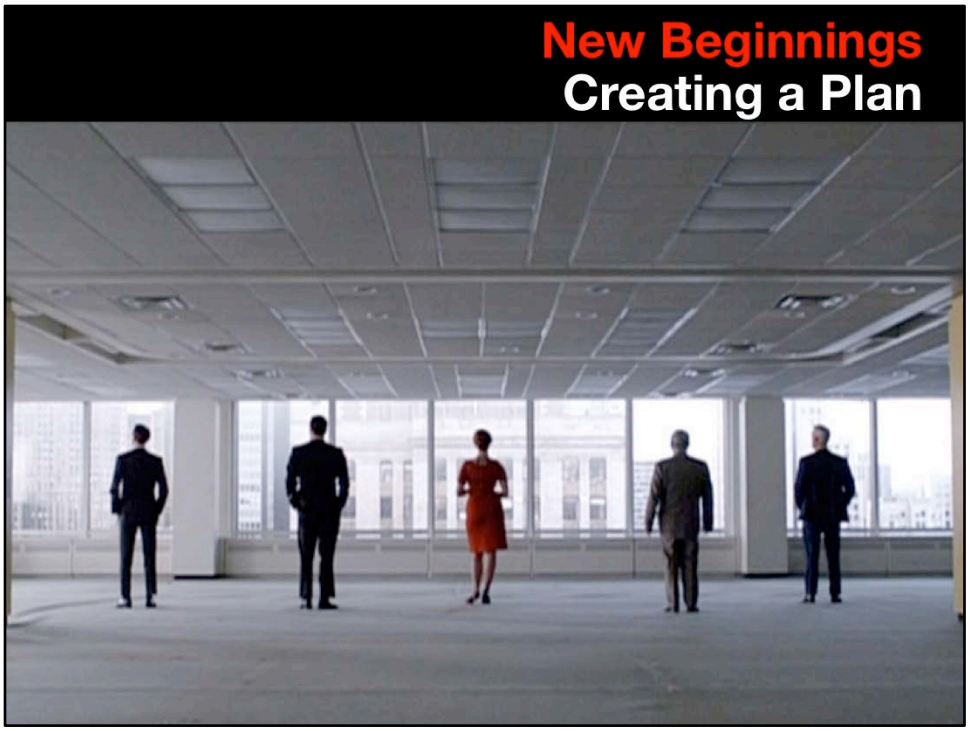
Image:
http://4.bp.blogspot.com/_FW86_jO7k_A/TEu_P63ft5I/AAAAAAAB4NU/Wx-6YRCDOVs/s1600/Mad%2BMen%3DMad%2BStyle%2BSeason%2B3%2BEpisode%2B13%2BP3.jpg



ArchivesSpace, or ASpace was chosen because after research and evaluation it appeared to best meet our needs, including:

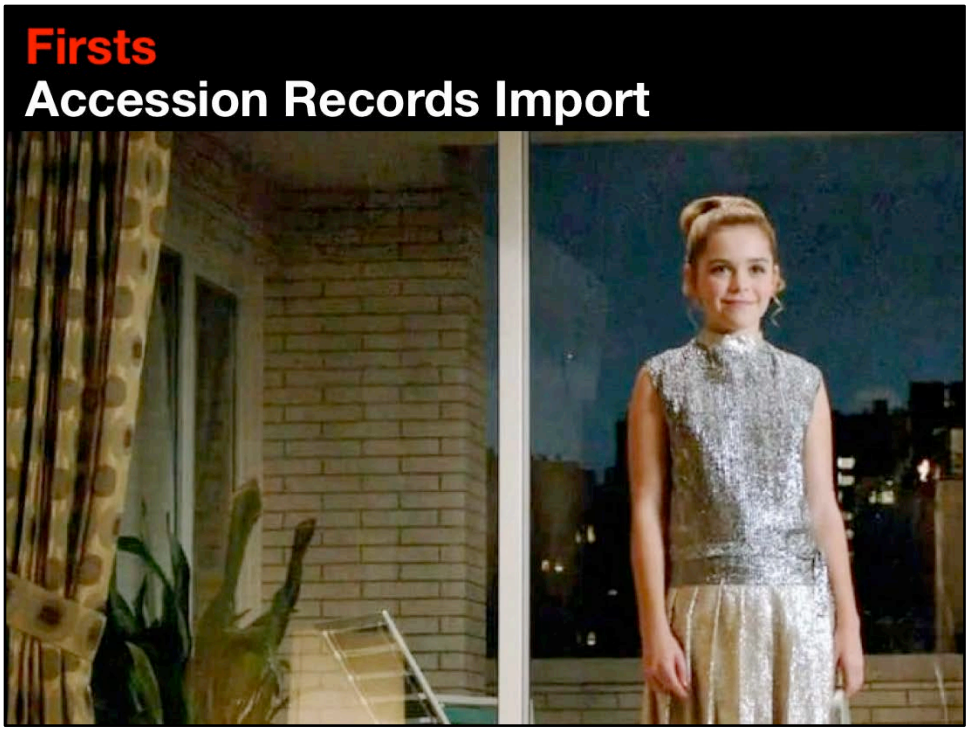
- Replacing the multiple Filemaker Pro databases, providing us a single system for accessions and processed collections.
- It's an archival management system that promises a wider use and support, particularly within the archival community. Especially important is that it is geared specifically towards archives, and supportive of best practices and interoperability.
- ASpace is written with archival metadata systems in mind, and it generates EAD, MARC, and PDFs.
- Finally, it's open source. We didn't want to use a proprietary system again like FileMaker Pro- part of the reason we decided not to continue its use was the upgrade cost, it wasn't financially feasible to us, therefore it was important given budgetary constraints that there was no upfront or annual fees. While both the Reuther and myself believe in open source software, and would like to be ASpace Members to support the system, our current budget reality is that we do not have the funds. So this has been a bit of a challenge for us because we are not members – but more on that later.

Image:
http://www.trbimg.com/img-551ef19d/turbine/bal-25-of-the-best-moments-in-mad-men-history--015/1300/1300x731



- After our ASpace instance was set up, we determined that we would begin with migrating our data from our current systems over to our new ASpace system.
- However, before actually moving data, we needed a plan- and that's where I came in.
- In my job as Technical and Metadata archivist I lead the use of descriptive standards for our collections and reengineer workflows.
- So, it was decided that I would lead the ASpace task force, made up of 7 of us.

Image:
http://cdn.wegotthiscovered.com/wp-content/uploads/MM513-3.jpg



Based on this, we decided to start with our accession records:

- Specifically exporting them from FileMaker Pro and importing them into ASpace. We decided to begin with the accession records in the Collections database. These were identifiable as “unprocessed records,” and we began with them because they were legacy accession records, and no new accession records were being added to this database.

Image:
https://s-media-cache-ak0.pinimg.com/736x/56/f6/13/56f6131ea6873d08ef06616382806cf9.jpg

We took the following approach:

- Review and determine which FMP accession record fields to export
- Map those fields to the ASpace accession records and determine any needed normalization schemas - I'll discuss this in more detail on the next slide.
- Export the records from FMP (this resulted in over 6000 exported accession records)
- Group the records by collection, so the work could be divided up by collection archivist
- Archivists cleaned up the data, ensuring it was accurate (over the years some of the data in our database is less than perfect) then normalized the data, meaning that it was in the proper format(s) accepted by ASpace.
- Then imported the records into ASpace on a rolling basis as I and other archivists completed the normalization and data cleanup.

Image:
http://blogs.forward.com/workspace/assets/images/articles/gabedondraper.png

- As mentioned, the first step in transitioning our accession records from FileMaker Pro to ASpace was to review the accession record fields in both systems.
- First we reviewed the FileMaker Pro fields, and determined which needed to be exported (some weren't used consistently and were of no use so we didn't export those).
- Then I reviewed the ASpace Accession fields- both those in the system, and those in the accession import file, because not all of the fields available in an accession record are available to import in the accession import .CSV file.
- After reviewing these, I mapped the FileMaker Pro fields to the ASpace Accession import file fields, and determined which fields needed to be normalized (that is, their format modified to ASpace's accepted format) and what those normalizations schemas should be.

Image:
https://img.washingtonpost.com/wp-apps/imrs.php?src=https://img.washingtonpost.com/blogs/style-blog/files/2013/04/MMS6_0018_image_982w.jpg&w=1484

Import Map
Filemaker Pro to ArchivesSpace

FMP FIELD + Normalization Rule	Aspace Import Field/Column Header	Aspace Record Type	Target field in Aspace	Field Length	Data Type	Aspace Rule
vCollectionFamily	agent_name_primary_name	agent/name	primary_name		text	
vNativeRID [no normalization]	user_defined_integer_1	collection_management	user_defined_integer_1		integer	
vCompositeName \WarningMessage [normalization: Title must be DACS compliant]	accession_title	accession	title		text	
vAccession # [normalize: full alphanumeric]	accession_number_1	accession	id_0	50	string	
vAccessionDate [normalize: YYYY, YYYYMM, or YYYYMMDD]	accession_number_2	accession	id_1	50	string	
vAccessionDate [normalize: YYYY, YYYY-MM, or YYYY-MM-DD]	accession_accession_date	accession	accession_date		date	must comply to YYYY, YYYY-MM, or YYYY-MM-DD
vContents Desc\Dates [no normalization]	accession_content_description	accession	content_description		text	
vRetrievalORDeaccessionNotes [no normalization]	accession_disposition	accession	disposition		text	
vProvenance [no normalization]	accession_general_note	accession	general_note		text	
NOT IN FMP - HARD CODE	extent_portion	extent	portion	pre-defined values: whole part	whole (default)	
vBulkSize [normalization: convert to number of linear feet]	extent_number	extent	number		real	
NOT IN FMP - HARD CODE - linear feet	extent_type	extent	extent_type		config enum	from extent values
vBulkSize [normalization: number of SB, MB, or OS]	extent_container_summary	extent	container_summary		text	
vCollectionFamily [normalization: to LOC]	agent_name_primary_name	agent/name	primary_name		text	
vbulklocation [normalization: add a semicolon between locations]	user_defined_text_1	collection_management	user_defined_text_1		text	
vfulllocation [normalizaiton: add a semicolon between locations]	user_defined_text_2	collection_management	user_defined_text_2		text	

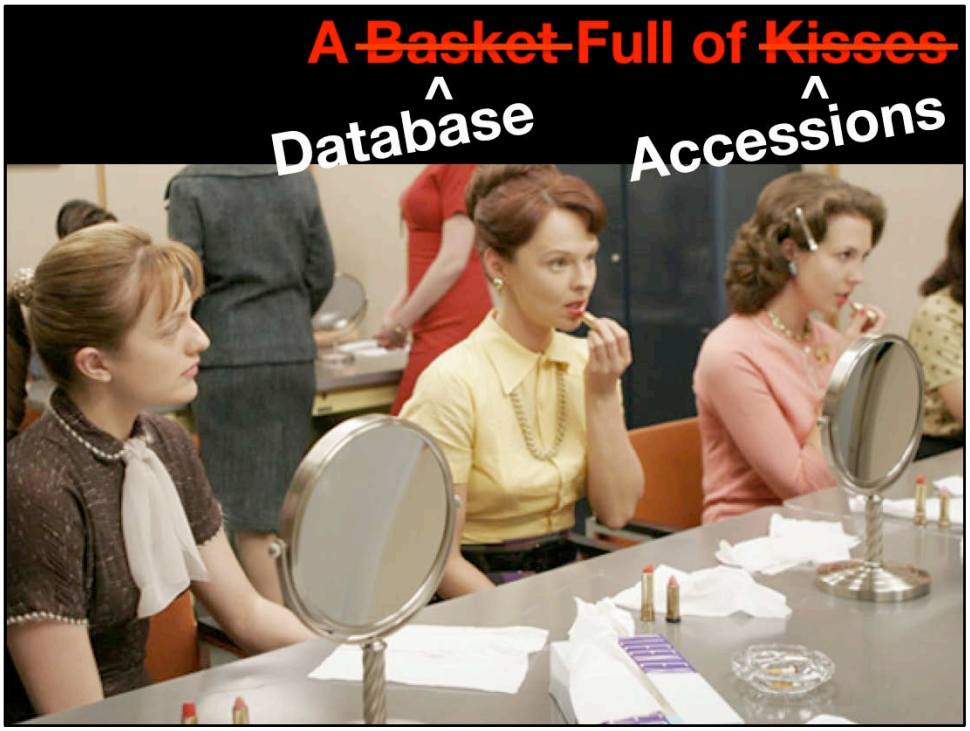
- Here is the spreadsheet mapping the FMP collections database fields along with their normalization rules to the ASpace import fields.
- Also included is the ASpace Record type (based on the 2012 specs- which is all we had access to as a non-member institution). Some of these are actually ASpace subrecords. Also included are the ASpace target fields, and in some cases the field length, data Type, and any additional ASpace rules that the data must follow.

- There were some fields that we needed to import that we were unable to import into the appropriate fields (for example- bulk location and full location- ASpace will not allow location to be imported unless you are migrating from AT, Archon, or another ASpace instance). Therefore, we included location information within user defined fields. Our plan is to go back in later, and properly link the accession to a location record. This is not ideal, but not the end of the world. Also- even if we don't do this, the main thing is that we have the location of the material stored somewhere within the accession record.
- Also, at the time we did this there was a bug inhibiting the importing of agents via the .csv file, so unfortunately we were unable to import record creators for our accession records.

- Image: FMP Fields Mapped Normalized.xlsx

- Once we decided what fields would be imported and how those fields mapped from FMP to ASpace, then we needed to get the legacy data out of FMP. The data was exported into an Excel spreadsheet. This allowed us the freedom to modify the data in Excel (including easily modifying the format of all date records at once), and then saving the file as a .CSV (comma separated value) file, which is one of the ASpace's acceptable import file types.
- Since the work conducted on the legacy data included staff verifying the data's accuracy, and making any necessary corrections (as well as normalizing the data to adhere to ASpace's format standards), this has also served as a data clean up/ collection management project too.

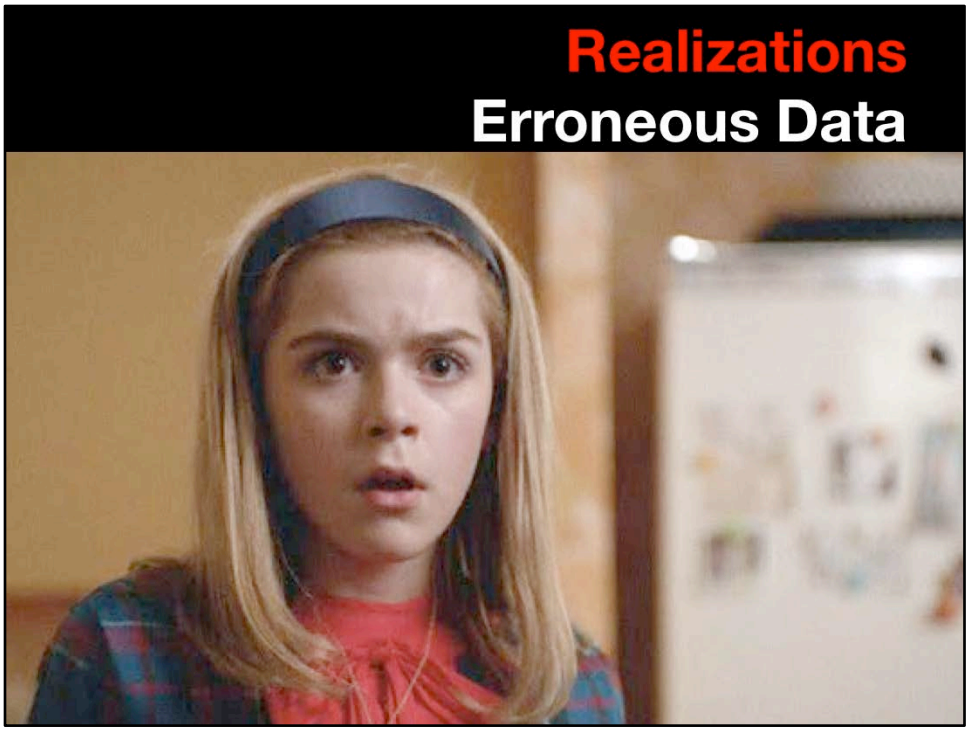
Image:
http://inthesetimes.com/images/remote/http_inthesetimes.com/images/articles/Doyle_Mad_Men_Season_7_Eppisode_7_MidSeason_Finale_Cooper_Waterloo.jpg



Once we completed importing our known accession records from our Collections database, we needed to do the same thing for our accessions database. We followed a similar process where I compared and mapped fields, exported records, and then since there were only a few hundred records, I normalized the records myself and imported them into ASpace.

- However, the Accessions database provided an additional challenge: we actively used this database to enter accessions records. So prior to exporting data, the database was made read only so no additions or changes could be made post-records export.
- Concurrent to this, the team was working on transitioning our accessioning workflow to include ASpace.
- **which staff were trained on and transitioned to about a month after the Accessions database was made read only. In the interim, staff used paper accession forms modeled after the FMP Accessions database.**

Image:
http://2.bp.blogspot.com/_eZmtJNaEH0Q/TFTulyCoSrI/AAAAAAAABfM/vybZztTAFDU/s1600/bel-jolie-lipstick.jpg



- Around this time the team has a realization: some records that were marked "processed" in our Collections Database were actually also accession records…
- At issue is that some collection records were initially created as accession records. Then, after the collection's material was processed, rather than leaving the accession record marked "unprocessed" and creating a new record for the processed collection, the original record was modified to reflect the metadata of the now processed collection.

This is problematic:

- These records often no long necessarily reveal the chain of custody,
- These records don't reflect the initial, accessioned extent, etc.- because that information was replaced with information about the collection as it is now: processed.
- However, this is an excellent example of why we need a system like ASpace that is forces the creation of a resource record, or new, linked record for the processed version of the collection.

But practically, what it meant was…

Image
http://seantcollins.com/wp-content/uploads/2013/06/MAD_MEN.jpg

More records to import!

I, along with some other task force members went through and determined which of the records labeled as “processed” were actually also accession records. We could often tell because these records did not have a reference to another record ID (meaning the record ID of their accession record). It also often required additional searching in the database and/or the collection’s casefile.

Once this was completed, we followed a similar procedure to the original, “unprocessed” accession records that we imported from the Collections database.

Image
http://www.youknowyoulovefashion.com/storage/madmen/season6/06x04/0604JoanScarlett.jpg?__SQUARESPACE_CACHEVERSION=1366917876943

As of Tuesday, April 7, all of our accession records were imported. Also, I updated our Accessions workflow so that as of February we began entering our new accession records into ASpace rather than our FMP Accessions database. So all of our accessions work is now conducted in ASpace. – YAY!

Image location
http://cdn.citylab.com/media/img/citylab/2015/04/MadMenParty/lead_large.jpg

We faced a number of challenges, many of which will sound familiar to those of you who have worked with ASpace:

- We're not a Member Institution so we didn't have access to documentation or the ability to participate in the member forums
- We are not migrating from Archon/Archivist's Toolkit so we could not use any specialized migration tools
- The error handling for importing records is usually very cryptic and difficult to interpret.
- Our legacy data is less than perfect. The data was often inconsistent in format, sometimes incorrect, etc.

Images:
http://www.trbimg.com/img-551ef186/turbine/bal-25-of-the-best-moments-in-mad-men-history--007/1300/1300x731

So how did we accomplish our goals- importing all of our accession records (with the data cleaned up and normalized!), and moving our accessioning workflow into ASpace despite these challenges?

- I was able to attend an ASpace training workshop in Omaha, NE. This was exceedingly helpful as I could ask questions directly to the ASpace PM, engage with other archivists in similar positions, and I also received a workbook with documentation- which has been a big help.
- Internet research! I read (and post when necessary) in the Google Group which is open regardless of membership status. I read the archives of the Member Forums, the SAA Collections Management Roundtable listserv is helpful, as are a variety of blogs – particularly Yale's which documents their customization work which is open source and available for use.
- Reach out and talk to colleagues!
- The task force and staff at the Reuther. Our dean, interim director, and current director have all been extremely supportive of this initiative. Also, we have a wonderful staff and everyone is willing to contribute their expertise and ideas. This has helped solve issues and come up with work-arounds when ASpace in unable to accommodate one of our needs.

Image
http://img2.tvtome.com/i/u/80a28b8d231244aec437e58f25f06ffd.png

So what did we accomplish:

- Data cleanup and normalization of all our accession records
- Imported over 5500 accession records (we were able to delete several hundred accession records as we determined they were bad data)
- Sunset the FMP Accessions Database (sunset of Collections and Processing Worksheet databases are forthcoming- pending additional work in ASpace).
- Reengineer our accessions workflow so that it now incorporates ASpace rather than FMP.

Image:
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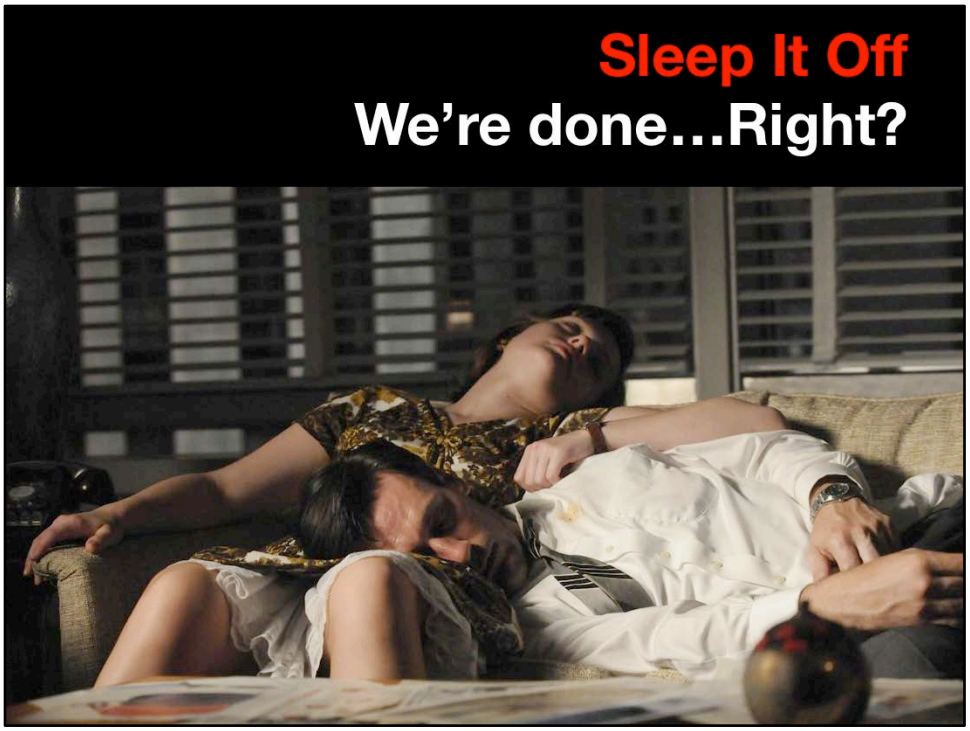

So we've completed the accessions work in ASpace, so we're done right?

Nope!
Now we're moving on to:

- Moving our finding aid creation workflow into ASpace
- Importing our processed collection records, i.e., resource records into ASpace
- Making this our archival management system!

Image:
http://www.trbimg.com/img-551ef199/turbine/bal-25-of-the-best-moments-in-mad-men-history--013/1300/1300x731

Thanks! I hope you found this helpful. Does anyone have questions?

Image:
https://encrypted-tbn1.gstatic.com/images?q=tbn:ANd9GcRimuw3paZu8_iHs2NVQ42ZwbXcjDsTAbfjCBJhheFJ4Jr2fuP2