

ON THE RIGHT TRACK:
INTEGRATING ISLANDORA
INTO RM AT LUTHER COLLEGE

Hayley Jackson, MN Pals Workday, August 14, 2018

Discussion Overview

- Records management revision backstory
- The trouble with Katie
- Plans for integrating Luther Digital into records management practice

Records Retention Policy Revision

- Early project: revising the records management (RM) policy
 - ▣ Overlapped with digital preservation
 - ▣ Department/office interviews
 - What records have gone digital?
 - What new types of digital records are being created and need preserved?
 - Where do all these digital files live?
 - ▣ General lack of awareness that digital records need to be archived like physical records

Records Retention Policy Revision

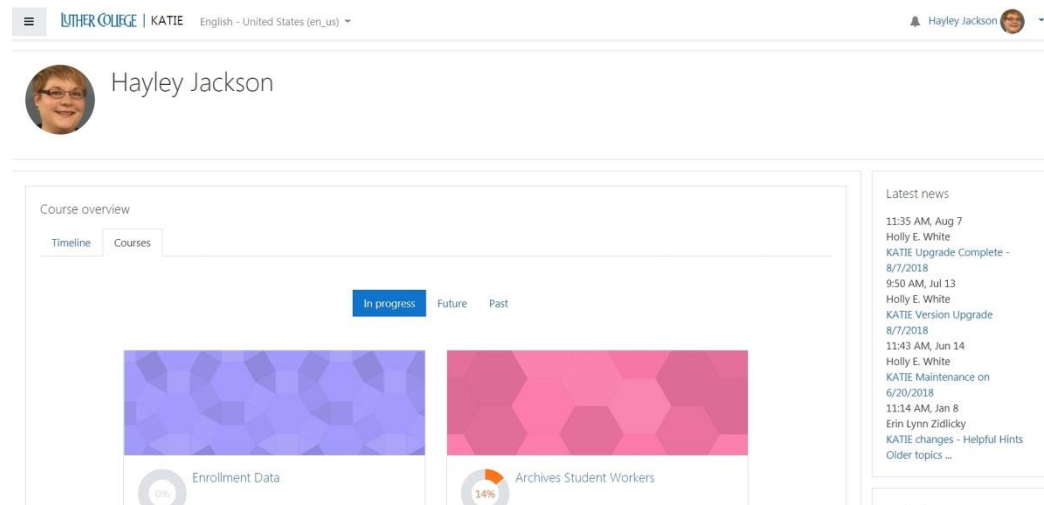
- Major goal of revision: incorporate digital RM more explicitly in policy and practice
 - ▣ High-Level Policy: Update Language
 - Inclusive of digital records
 - New sections explicitly discussing digital RM
 - Left broad in terms of practice
 - ▣ Ground Level Practice: Integration
 - No one size fits-all solution
 - Create several procedures that easily integrate into existing workflows

Rounding Up Digital Records

- Luther stores digital assets in a variety of locations
 - Network drives
 - Google Drive
 - Google Team Drives
 - Emails of individuals and organizations
 - Luther College website
 - External flash drives/hard drives
 - Legacy media (floppies, zip drives, etc.)
 - Katie

Katie

- Katie: Moodle-based, homebrew course management system
- Primary use: course management
- Secondary use: document storage
 - ▣ Faculty meeting materials
 - ▣ Board of Regents
 - ▣ Enrollment Reports
 - ▣ Faculty Committees




The screenshot displays the KATIE Moodle interface. At the top, the header includes the Luther College logo, the text 'LUTHER COLLEGE | KATIE', the language 'English - United States (en_us)', and the user name 'Hayley Jackson' with a profile picture. Below the header, the user's name 'Hayley Jackson' is repeated next to another profile picture. The main content area is titled 'Course overview' and has two tabs: 'Timeline' and 'Courses'. The 'Courses' tab is active, showing a navigation bar with 'In progress' (highlighted), 'Future', and 'Past'. Below this, there are two course cards. The first card, 'Enrollment Data', has a blue background and a progress indicator showing 0%. The second card, 'Archives Student Workers', has a pink background and a progress indicator showing 14%. On the right side of the interface, there is a 'Latest news' section with a list of recent updates, including dates and times, and names of users like Holly E. White and Erin Lynn Zidlicky.

All-Faculty Committee Katie Site


All-Faculty Committee Katie Site

☰ LUTHER COLLEGE | KATIE English - United States (en_us) ▾





Hayley Jackson  ▾

All Faculty Committees

Dashboard / My courses / Miscellaneous / ALL-FACULTY-COMMITTEES



Your progress 

This KATIE site is designed to be a central location for all major faculty committees to post minutes, agendas, attachments, etc. that should be accessible to the full faculty. Each committee is responsible for updating and organizing its own section of the site. Thank you!
- Faculty Organization Committee

-  2018-19 Schedule of Faculty Meetings
-  2017-18 Faculty Committee Roster (spring update)
-  Spring 2018 Voting Faculty List
-  Announcements

Topic 1

Faculty Meeting Documents: Meeting Agendas, Minutes, Attachments, Lists





-  2018-19 Faculty Meeting Agendas, Minutes, Attachments
-  2017-18 Faculty Meeting Agendas, Minutes, Attachments

Recent Courses

NOTICE: courses will not show up in this area unless you've first visited them through Navigation > My courses

- All Faculty Committees
- Archives Student Workers
- Board of Regents Materials
- Planning Documents
- Enrollment Data

Activities

-  Feedback
-  Forums
-  Questionnaires
-  Resources

Troubles with Katie

- Not designed for preservation
 - ▣ Minimal search
 - ▣ Minimal metadata/description
- Inconsistent usage
 - ▣ Responsible parties do not routinely upload files
 - ▣ Knowledge of practice does not always survive turnover
- “Download/Upload Roller Coaster”
 - ▣ Past practice: archivist downloads from Katie, attaches metadata, re-uploads elsewhere for preservation

Why Not...Cut the Middle Man?

- Idea: train faculty/staff to upload records to Islandora instead of Katie
 - ▣ Only need to upload once
 - ▣ Solves problem of batch-ingesting at the end of the year
 - ▣ Records safely in the archive – archivist does not need to hunt people down

Challenges of Islandora

- Collecting quality metadata
- Giving appropriate levels of access
 - ▣ Who can ingest files? Who can view what collection?
Who can edit metadata?
- New system
 - ▣ Adjusting old workflows to fit new software
 - ▣ Getting new users to actually use system

Easing the Transition

- Easy-To-Understand Ingest Forms
- User Roles & Embargo



Ingest Forms

- Luther Digital intended to be a **preservation** repository – quality metadata is **crucial**
 - Metadata needs to be:
 - Accurate
 - Thorough
 - Well-formed
 - Metadata needs to accurately connect digital files to their corresponding physical collection

Ingest Forms

- Challenges to good metadata
 - ▣ Majority of records creators unaware of what metadata is, let alone standards
 - ▣ Good metadata = more work
 - ▣ Records creators don't know our collection structure to add important pieces of data
- Goal of ingest forms: **collect as much metadata while making it as easy as possible**

Ingest Forms: Pre-Populated Metadata

- Ingest forms can be configured to pre-populate certain fields
- Automates part of ingest process, ensures metadata control
- Examples of good fields:
 - ▣ Call numbers (record group, series, subseries)
 - ▣ Collection titles
 - ▣ Copyright statements

Ingest Forms: Pre-Populated Metadata

Dashboard Simple Workflow Content People Modules Configuration Reports Help

Language
English ▾
Choose the appropriate language.

Repository
Luther College Archives
Enter the physical location for this document.

COPYRIGHT

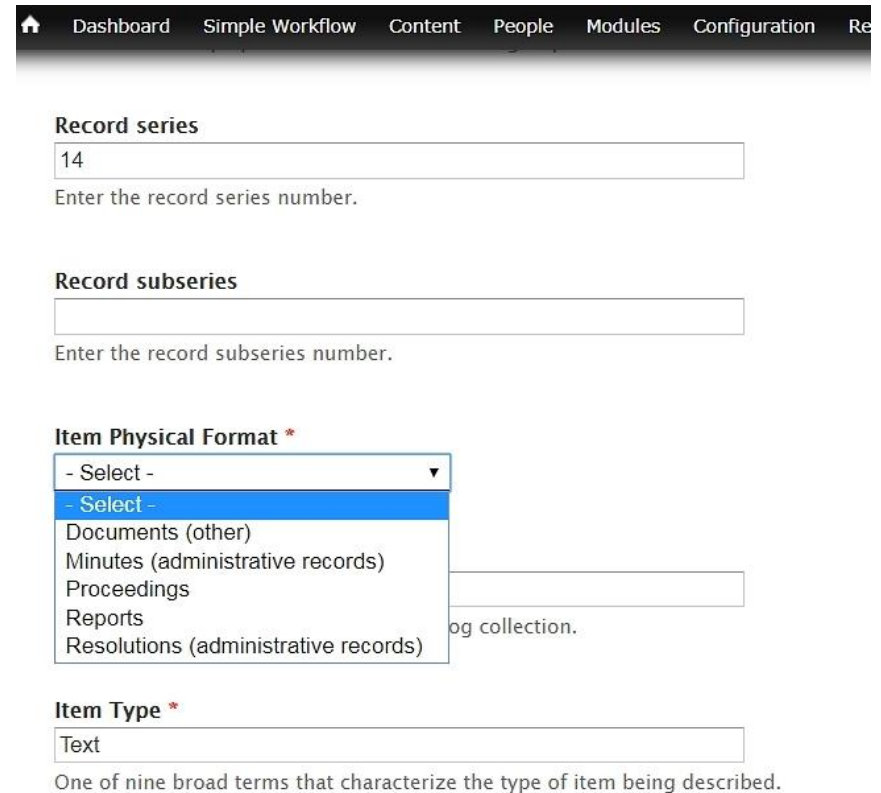
Rights Management
Use of this content is governed by U.S. and international copyright laws. Content is property of Luther College. Please contact Luther College Archives for permission to publish this content.
Enter applicable rights statement.

Rights Holder *
Luther College
Enter the name of the rights holder.

Previous Next

Ingest Forms: Drop-Down Selection

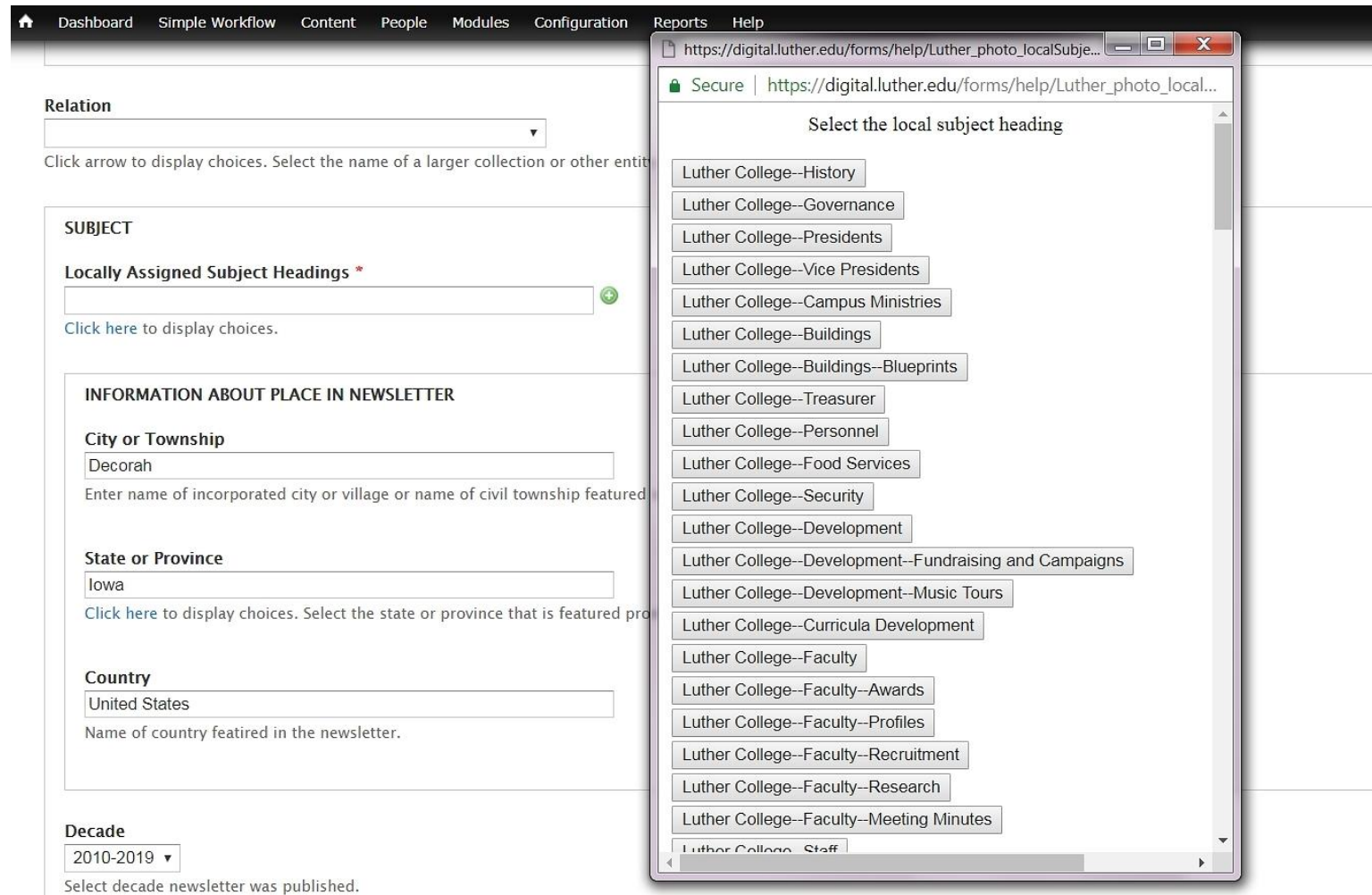
- Drop-down lists for fields with finite options/controlled vocabulary improve quality
 - ▣ Ensure metadata is well-formed/uses correct vocabulary
 - ▣ Easier for creators to choose an option than type by hand



The screenshot shows a web interface for an ingest form. At the top is a navigation menu with links: Dashboard, Simple Workflow, Content, People, Modules, Configuration, and Re. Below the menu are several form fields:

- Record series**: A text input field containing the number "14". Below it is the instruction: "Enter the record series number."
- Record subseries**: An empty text input field. Below it is the instruction: "Enter the record subseries number."
- Item Physical Format ***: A dropdown menu is open, showing options: "- Select -", "- Select -" (highlighted in blue), "Documents (other)", "Minutes (administrative records)", "Proceedings", "Reports", and "Resolutions (administrative records)". To the right of the dropdown is a text input field with the instruction: "log collection."
- Item Type ***: A text input field containing the word "Text". Below it is the instruction: "One of nine broad terms that characterize the type of item being described."

Ingest Forms: Drop-Down Selections



The screenshot shows a web application interface with a navigation menu at the top: Dashboard, Simple Workflow, Content, People, Modules, Configuration, Reports, and Help. The main form area contains several sections:

- Relation:** A dropdown menu with a downward arrow. Below it, text reads: "Click arrow to display choices. Select the name of a larger collection or other entity".
- SUBJECT:** A section titled "Locally Assigned Subject Headings *". It features a text input field with a green plus icon to its right. Below the field, text reads: "Click here to display choices." A modal window is open over this section, titled "Select the local subject heading". The modal contains a scrollable list of subject headings, including: Luther College--History, Luther College--Governance, Luther College--Presidents, Luther College--Vice Presidents, Luther College--Campus Ministries, Luther College--Buildings, Luther College--Buildings--Blueprints, Luther College--Treasurer, Luther College--Personnel, Luther College--Food Services, Luther College--Security, Luther College--Development, Luther College--Development--Fundraising and Campaigns, Luther College--Development--Music Tours, Luther College--Curricula Development, Luther College--Faculty, Luther College--Faculty--Awards, Luther College--Faculty--Profiles, Luther College--Faculty--Recruitment, Luther College--Faculty--Research, Luther College--Faculty--Meeting Minutes, and Luther College--Staff.
- INFORMATION ABOUT PLACE IN NEWSLETTER:** A section with three sub-sections:
 - City or Township:** A text input field containing "Decorah". Below it, text reads: "Enter name of incorporated city or village or name of civil township featured in the newsletter".
 - State or Province:** A text input field containing "Iowa". Below it, text reads: "Click here to display choices. Select the state or province that is featured prominently in the newsletter".
 - Country:** A text input field containing "United States". Below it, text reads: "Name of country featured in the newsletter."
- Decade:** A dropdown menu with a downward arrow, currently showing "2010-2019". Below it, text reads: "Select decade newsletter was published."

Ingest Forms: Clear Directions with Examples

- Precise directions and models help improve quality of free text fields
 - ▣ Establish naming patterns/schema
 - ▣ Puts tutorial right on screen
 - ▣ Simple corrections for errors

Title *

The title of the issue is the name of the publication, date of publication, volume and issue (if provided.)

Example:

College Chips, October 3, 1927, Volume 1, Issue 2

Record group *

[Click here](#) to display choices. Select the record group number of the newspaper issue.

User Roles & Embargo

- Common “red flags” about Luther Digital:
 - Who can add files?
 - Who can edit/manage digital objects and metadata?
 - Who can access certain files?
 - Will this show up on Google?
- One method of addressing these concerns is through Drupal User Roles
 - Limit who can upload records and manage metadata
 - Keep embargoed records closed until appropriate time

User Roles & Embargo

- To access certain records, users will need to create an account
 - ▣ Linked to NorseKey
- Registered users will be assigned a custom “role” when they register
 - ▣ Faculty/Staff: Can view certain collections and add material to certain collections
 - ▣ Alumni: Can view certain collections
 - ▣ Students: Can view certain collections
 - ▣ General public: Can view certain collections
 - ▣ Admin: Sees and manages all

User Roles and Embargo

- Drupal user roles allow for embargoing of certain collections
 - ▣ This embargo can be set to expire, similar to opening a closed archival collection
 - ▣ Example: anyone assigned to the “student” role prevented from viewing faculty meeting minutes from the last 5 years



Current Status

- Testing ingest forms for common items
 - ▣ Finalized in the coming year so we can start making the switch
- Start looking at limited user roles in near future
 - ▣ Faculty/Staff
 - ▣ Archives student workers



Thanks!

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