To Discovery and Beyond: Using Workflow Automation as an Opportunity for Collaboration and Education

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To Discovery and Beyond
Using Workflow Automation as an Opportunity for Collaboration and Education
Rebecca B. French, Metadata Analyst Librarian, James Madison University

Situation

- JMU Libraries Special Collections makes finding aids for manuscript collections accessible through four discovery platforms:
  - Libraries website
  - Special Collections staff
  - OCLC's WorldCat
  - AID Library Catalog (Sierra ILS)

The old workflow was very manual, requiring a lot of copying and pasting data from one system to another:
- Time-consuming
- Many opportunities for human error
- Difficult to keep different platforms in sync because all updates had to be made manually in multiple places
- Boring
- Does not use the unique skills and strengths of staff members

Automation

Project stages:
1. XSLT transformation scripts to create web page HTML from EAD, create MARCXML catalog record from EAD, and modify EAD for Virginia Heritage
2. Spaceport Python app
   - Uses ArchivesSpace API to get EAD from ArchivesSpace (replacing manual export)
   - Runs XSLT using Sawyer XSLT processor
   - Makes additional non-XSLT modifications to Virginia Heritage EADs
   - Graphical user interface allows user to select files they want to create and shows progress as the app runs, also shows error messages
3. Additional modifications to Spaceport for usability and stability
4. Python script to sync subjects between catalog and ArchivesSpace (in development)

Code available at https://github.com/frenchrb/JMU_ArchivesSpace

Participation

- Special Collections department:
  - Time to archives arrangement and descriptive manuscript collections, put finding aids on Libraries website, and submit finding aids to Virginia Heritage

- Metadata Strategies department:
  - Catalogs creates bibliographic records for manuscript collections, performs subject analysis, and bulk updates via OCLC and local catalog
  - Metadata librarian develops scripts and tools to automate parts of the workflow

Collaboration

Incremental approach:
- Initial meeting between Special Collections and metadata librarian to understand the current workflow, its challenges, and goals for improvement
- Met frequently to check in throughout project
- Developer shared updates and stakeholders provided feedback via email and in person
- Implemented automation in stages
- Similar to agile project management methodologies

Experimental mindset:
- Approached this project as an experiment, with the option to go back to the old workflow if automated solutions turned out to be unsatisfactory
- Process of trying different solutions was valuable professional development, increasing developer’s skills and knowledge of strengths and weaknesses of different technologies
- Goals evolved organically as we found successful solutions and gained new skills

Observations

Benefits of improved workflow:
- More efficient and sustainable workflow
- More consistent discovery experience for patrons
- Facilitated completion of additional projects, both by freeing up time for them and providing the tools to make the work possible
- Updates to legacy description
- Migration of Libraries website content management system
- Update look of finding aid web pages
- New implementation of automation of routine tasks freed up time for staff to do work they are uniquely skilled at (e.g., subject analysis, description)

Benefits of incremental and collaborative approach:
- Provided space for professional development and for gradually building skills needed to complete project work
- Supported evolving project goals
- Facilitated adapting to the new workflow
- Easier to test changes in small chunks
- Easier for staff to adjust to smaller changes
- Generated excitement and buy-in by making the most impactful change first
- Strengthened relationships between departments
- Enabled project work to fit in with other priorities rather than being put off until it could all be completed at once

Recommendations

Courses, workshops, websites, and other resources and documentation for learning more about the tools and technologies used in this project:
- XML and XSLTs
- Python
- Automation tools
- Libraries
  - Libraries website
  - Virginia Heritage
  - OCLC WorldCat

Tiffany Cole, Special Collections Archivist

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

-Tiffany Cole, Special Collections Archivist