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Call for Core Training Co-ordinators

The ARA training group is looking for a number of new members to contribute to the Core Training offer for ARA members. We believe that the provision of quality, inexpensive, accessible training is one of the key roles for ARA. As a group we oversee training across the Association, designing and delivering regional and specialist training events. In the last two years we have developed the new Core Training events.

Can you help us to further develop our training provision? Are you looking to spread your wings and broaden your horizons from your current job? Do you have something to offer?

We are particularly looking for people to take on the roles of Core Training Co-ordinators. These are people who look after specific Core Training courses and take responsibility for their structure and administration. This is an excellent opportunity to develop your skills and show a commitment to your continuing professional development.

We are looking for enthusiastic people who can make a minimum two-year commitment to the role. We meet three times a year with discussions in between by teleconference and email. Travelling, telephone and other expenses are met by ARA. For an informal discussion or to express an interest contact the chair of the training group.

Lizzy Baker, ARA Training Group Chair

Email: lizzy.aratraining@outlook.com

The ARA's Core Training programme is supported by Link 51.

ARC magazine

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Welcome to **ARC Magazine** March 2015

Welcome to March and to this special issue of *ARC*. This month the magazine is packed full of articles collected by the ARA Section for Archives and Technology (SAT).

I have discovered a lot about the SAT from editing this special issue. Many of you will know that they are an active, forward-thinking section, concerned with building a community of practice and research around archives, records and technology. The group provides a focus for discussion and support so that professionals can keep up-to-date with developments and best practice in the curation of digitised and born-digital material.

Some of the key areas the SAT covers include preservation and accessibility of digital material, and the creation, extraction and authentication of metadata. They are also interested in the security and architecture of online and offline information systems.

If you want to find out more, I suggest you visit SAT's extensive and impressive web pages:

www.archives.org.uk/about/sections-interest-groups/archives-a-technology.html

Here you will find brief guides to various standards – including archival metadata structure, indexing, thesauri, word lists, and file formats. There is also a guide to getting started in digital preservation, which highlights useful starting points and links to resources and tutorials. You will also find details of past and forthcoming events, as well as presentation slides relating to current research in the field.

We are fortunate to have such an impressive array of articles in this special issue of *ARC*, many of which are written by SAT officers and experts in their field – in particular Simon Wilson, Chris Fryer, Jenny Bunn and Andrew Young. I would also like to take this opportunity to thank Lisa Greenhalgh, SAT ARC Special Issue Co-ordinator, for her help in collating yet another inspiring edition of *ARC*.

Ellie Pridgeon
Editor

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Front cover shows: The Georgian quarter in HullCraft built by players and inspired by Francis Johnson. Image copyright HHC.

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opening lines

Penny Hutchins, Archivist at the Royal College of Obstetricians and Gynaecologists.

Bag belonging to medical consultant Jack Suchet, father of the actor David Suchet

So it started with a series of questions: What if? Would you? Don't suppose he would like to? To be honest, when you have two very eager members of staff from The National Archives (TNA) facing you across a table in the coffee bar at Kew, you don't really want to say no! That is how I came to be involved in the successful launch of Explore Your Archive back in November 2014.

You might recall that the Explore Your Archive team managed to get two slots on BBC Breakfast on the morning of 10 November, featuring the very charming Tim Muffett from the Breakfast team, and the fantastic Stephen McGann, from the Call the Midwife cast. Add Jeff James, Chief Executive of TNA, a collection of midwifery archives and artefacts, the Royal College of Obstetricians and Gynaecologists (RCOG) library, our lovely midwife mannequin, and yours truly – and we had all the ingredients for launching the campaign, letting the nation know all about archives (well, as much as you can tell them in a few seconds!)

Despite my absolute insistence that I did not want to feature in the broadcast, I found myself at work at 5am, preparing to talk (babble?) about archives – again, how can you refuse when asked by such an enthusiastic and persuasive TNA team? Surreal, nerve-wracking, petrifying – they are the initial words that come to mind when summing up how I felt! The actual broadcast went by in a flash and even the waiting around was made less tedious by the witty conversation led by Mr McGann. By 9am, all was tidied away and the college library was open for business as usual.

A lovely lady came in that very afternoon after seeing us on the television, bringing with her a midwife's case book from the 1940s as a donation, and other donations were received in the following weeks. There were general comments of pleasure and satisfaction at the promotion of the RCOG via the campaign launch, and this certainly helped to cement my previous efforts at raising the profile of the archive as a corporate asset! Personally, it was great to hear from friends and colleagues who saw the slots, and to feel part of the Explore Your Archive campaign in a way that I have never been before.

It was good to be included in such an event – but would I do it again? Absolutely not! But for me, my participation in this shows just what a sharing network of professionals we are – no matter the size of repository or extent of your experience, we all have a part to play and something to say about the things we do and are passionate about!

Penny Hutchins, Archivist at the Royal College of Obstetricians and Gynaecologists, was part of BBC Breakfast's coverage of the Explore Your Archive campaign in November 2014.

Registration Scheme **news**

Newly-registered members of the ARA:
Following the most recent assessments of portfolios submitted to the assessors, the successful candidates are as follows:

Nichola Court
Assistant Archivist, West Sussex Record Office

Angela Haighton
Public Records Officer, Isle of Man Public Record Office

Eleanor Possart
Archivist, Oxford Brookes University Library

Elen Simpson
Archivist, Library and Archives Service, Bangor University

Janine Stanford
Project Archivist, The Children's Society Records and Archives Centre

Charlene Taylor
Archivist, Worcestershire Archive and Archaeology Service

David Tilsley
Archive Collections Manager, Lancashire Archives

Lorna Williams
Senior Archivist, Bank of England Archive

The committee would like to congratulate the newly registered members on their success.

We would also like to acknowledge the efforts of the successful candidates' mentors:
Elizabeth Hughes
Miriam Critchlow
Karen Robson
Helen Gwerfyl
Phillipa Smith
Lisa Snook
Joanne Fitton
Liz Newman

The committee would like to thank them for the time and support they have given to the candidates.

New enrolments
We welcome the following new candidates to the Registration Scheme and wish them good luck with their progress:

Catriona Cannon
Assistant Archivist, Royal Opera House

Bryony Leventhall
Assistant Records Manager, Bank of England

Lucy Allen
Archivist, London Borough of Bromley

Kristina Watson
Collections Cataloguing Officer & Volunteer Co-ordinator, Royal Commission on the Ancient and Historical Monuments of Scotland (RCAHMS)

David Luck
Senior Archivist, London Metropolitan Archives

Melissa McGreechan
Cataloguing Archivist, Transport for London

Patricia Bedlow
Currently taking an M.Phil in Public History, Trinity College Dublin

Gabrielle St John-McAlister
Archivist, The Children's Society, London

Arike Oke
Archivist, Rambert Dance Company, London

Charles Dace
Archivist, Wrotham Park, Hertfordshire

The above-named candidates are the final enrolments to the existing Registration Scheme. Enrolments to the new scheme will open on 1 January 2016.

Don't forget: Existing candidates have 31 months to submit their portfolio under the existing Registration Scheme.

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Registration Scheme admin and bursaries:
Email: regschemeadmin@archives.org.uk

Registration Scheme Communications Officer:
Email: regschemecomms@archives.org.uk

Registration Scheme mentor queries and advice:
Email: regschementors@archives.org.uk

Richard Wragg
Communications Officer, Registration Sub-Committee

Registration Scheme **Workshop**

Registration Scheme pre-submission **'Blitz-It'** workshop at the Institute of Historical Research, Senate House, London on Monday 23 March 2015, 1pm-4.30pm

This FREE half-day workshop is for candidates who have been working on their portfolio for a number of years and who would welcome some extra support to get their portfolio ready for submission in the next 6-12 months. Mentors of candidates in this position are also welcome.

Remember: the Registration Scheme will be changing, as part of the ARA's new Continuing Professional Development (CPD) Framework, and the last submission round under the current Registration Scheme will be 1 October 2017.

This surgery-style workshop will provide a brief reminder of the key components of the Registration Scheme:

- Structuring the portfolio across the four development areas: formal training courses, study and research, work achievements, contributions to the profession
- The assessment criteria and working through learning outcome forms: motivation, achievement, evidence
- Claiming more than one credit
- Writing the reference
- The assessment process

In addition, there will be opportunities for candidates and mentors to have a one-to-one discussion about their portfolio with the Registrar or an experienced assessor.

To get the most out of the workshop, candidates should bring their draft portfolio with them for their own reference. Examples of successful portfolios and learning outcomes forms will also be available.

Workshop Presenters include: Tricia Phillips, ARA Registrar, Elaine Penn and Victoria Cranna, Assessors

To reserve a place for the workshop (maximum 12) and receive further location details, please contact Kate Jarman, Registration Events Coordinator:

Email: regschemeevents@archives.org.uk

Collecting **matters**

Collecting archival information: 70 years

Last year, The National Archives (TNA) launched Discovery, which brings together information about our collections and replaces services such as the National Register of Archives (NRA) and Access to Archives (A2A):

http://discovery.nationalarchives.gov.uk

Discovery seeks to provide users with descriptions of central government records, other public records, and private archives in the UK.

There is a rich history and tradition behind the principle of maintaining a central collecting point for information about records relating to British history. NRA was established in 1945 to collect information about the existence, location and ownership of private archives. It developed out of the reports and calendars which the Historical Manuscripts Commission (HMC) had been producing since its formation in 1869. NRA was established at a time when concerns about the survival of historical records had been amplified by wartime bombing and salvage drives.

NRA continued to develop, and by the late 1980s registration and indexing of NRA lists was computerised. In 1995, the indexes were made available online. Discovery now contains 32 million record descriptions held by over 2,500 institutions across the country, and collections information from NRA relating to over 220,000 record creators.

Developments in technology and archival practice continue to make sharing and exchanging collections information easier. At TNA we have been working with a small number of archives to analyse data from their cataloguing systems to support the development of new tools for updating and adding collections information to Discovery.

Keep up-to-date with this work at:
www.nationalarchives.gov.uk/archives-sector/finding-archives.htm

Sam Meunie
Collections Knowledge Manager
The National Archives

Email: asd@nationalarchives.gsi.gov.uk

Website: www.nationalarchives.gov.uk/archives-sector

Welcome to the Section for Archives and Technology special issue of ARC

Simon Wilson introduces the featured articles and reflects on the section's activities.

Huge thanks go to Lisa Greenhalgh, Andrew Young and Ann McDonald for their efforts to co-ordinate these articles, which reflect our wide remit – cataloguing software, discovery systems, Wikipedia and digital preservation to name but a few.

There is an update from Emma Bayne on The National Archives (TNA) Discovery system, which has been significantly updated and revised, and its plans for the future to improve the way it works. On the topic of discoverability, there is also a report on the Archives Portal Europe (APE), which seeks to take archival descriptions to a wider audience, whilst truly stretching the data exchange capabilities of Encoded Archival Description (EAD).

There is also a report from Cassandra Johnson about the work undertaken at the Dorset History Centre (DHC) to migrate from Adlib to Calm, which examines the lessons learnt on this journey and the importance of clean and tidy data. This theme is repeated in the account of the development of a new interface for the Hull History Centre's (HHC) online catalogue. It may be a reflection of having spent too much time on data analysis that the date slider feature brings so much pleasure.

Andrew Young's research into the impact of linking from Wikipedia pages through to entries on the Archives Hub serves as a timely reminder that simple tasks can have a demonstrable impact. If you haven't already done this, give it a go with some of your more prominent collections.

There is a report on the 4C Project conference which featured the launch of the project's roadmap and the Curation Costs Exchange (CCEx), which encouraged participants to think strategically and consider sustainability issues surrounding digital preservation.

There is a report from the successful cataloguing born-digital material event organised and hosted by Jenny Bunn, which looked at the challenges faced by delegates working with donors and users. A thread throughout the day was the role and importance of ISAD(G). The SAT will be looking to take this forward in 2015 by creating a platform where archivists can comment, discuss and share their experiences of the standard in their workplace.

Simon Wilson
Chair, Section for Archives and Technology

Discovery: finding archives across the UK

Discovery now enables users to search record descriptions for collections scattered across the UK, not only those held by The National Archives (TNA).

Discovery holds 32 million records. 22 million of these are held at TNA (of which nine million are digitised), and over ten million records are held in more than 2,500 archives across the country. The value of combining all of this information is enormous: information that was previously held across numerous online services can now all be found in one place. Discovery therefore provides a single point of online access to catalogue and organisational data from across the archive sector, and highlights TNA's commitment to its role as sector lead.

A lot of hard work has gone into upgrading Discovery. A list of over 400 detailed requirements and 50 high-level requirements was agreed after rigorous user research. This included focus groups and online surveys, as well as feedback from users (current and potential), contributors (archives that provide us with information about their collections), and staff.

Discovery makes it easier to find the information you need. New functionality, filters, a new search engine and an improved advanced search means that everyone can engage more easily with archives and make their own discoveries.

The challenge with building such a unique service is the sheer volume of data. Integrating over 30 million records from multiple datasets with differing data structures and formats has been a challenge. A rigorous data-mapping exercise, followed by testing 'bite size' chunks from each source, has helped to resolve this problem. As a response to this data-mapping exercise, and subsequent testing, we were able to integrate data more easily and with more confidence about the results.

Another challenge is the consistency and adequacy of data. The data has been created over many years in many forms. With the advent of search engines and large-scale data analysis, consistency is more essential than ever. Looking for patterns when issues arise enables bulk fixes, but other issues can be more complicated and need more intellectual analysis.

One of the long-term benefits of developing Discovery is the opportunity to improve the way we update and manage the records information provided to us by other archives.

We are currently looking to develop an administrative tool for Discovery. It will enable us to curate data here at TNA and provide mechanisms for manual or automated data contribution from other archives. We will improve the ways we can take in full catalogues, summary accession and collection level content, name authorities, and Manorial Documents Register data. We will be working with archives to develop new and improved ways in which they can share their records information with us, and discuss strategies to ensure that Discovery is the most comprehensive resource possible.

While we build this tool, we will continue to update the information held within Discovery, and to make new content available within the constraints of continuing technical development.

We would like to thank everyone who has already been involved in the user testing research and offered their time and feedback – your views, support and interest are very much appreciated. We always welcome more feedback, so please use the 'send us your feedback' link in Discovery to offer your views or suggestions.

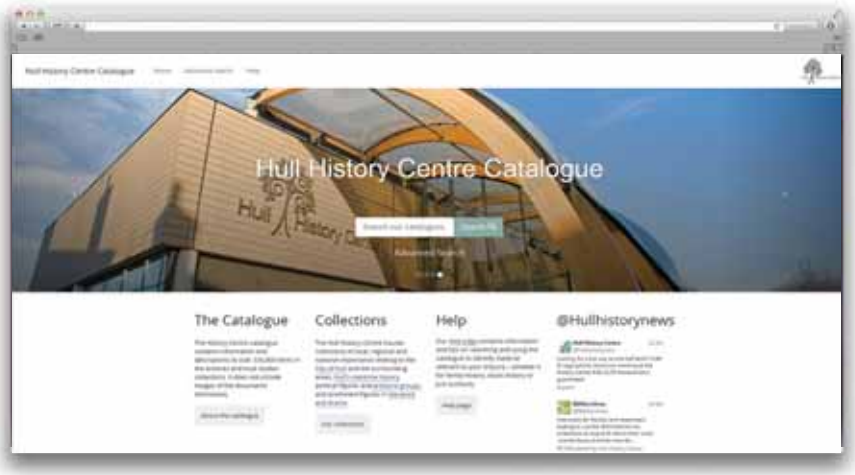
Emma Bayne
Head of Systems Development, TNA

Discovery homepage, TNA website. Image copyright TNA.

A new interface for the Hull History Centre online catalogue

From the outset, a key element of the Hull History Centre (HHC) project was that our online catalogue offered the ability to search across the collections held by the Local Studies Library, HCC and the University of Hull Archives.

This we achieved when the HHC opened in January 2010, but with mixed results. The local studies library data was particularly difficult to integrate because of the use of different fields and conventions. Presenting the archive reference number and the library shelf mark in the same 'reference number' field removed the capacity for this field to be sorted. However, we decided that this was still a better option than keeping the data separate and having empty fields on the results page.



New catalogue homepage screen, HHC. Image copyright HHC

The need for change

By 2014, we knew that the next release of Calm (version 10) would not be compatible with the DServe front-end. We were faced with a choice of sticking with our current system and not upgrading Calm, or adopting a solution that would allow us to use Calm behind the scenes with a new online interface. We chose the latter, and after reviewing our options, we decided to implement Blacklight, which the University of Hull Library was already using for its online catalogue: www.projectblacklight.org

The change gave us a chance to identify the elements of the current system we wished to retain, and the opportunity to see which elements and functionality could be improved.

Data analysis

A key requirement for us was better integration of local studies books. The American consultancy firm Data Curation Experts, who were familiar with Blacklight, undertook analysis of our data after we specified our requirements and provided sample data: www.curationexperts.com

The library data is exported as one set of data from the SIRSI system. For the archive data, we export each collection as a distinct Encoded Archival Description (EAD) file using the Calm report feature. We discussed issues via email and Skype, and they handed back a data model and technical infrastructure. Colleagues in the University of Hull ICT department then worked on the interface so it would work on a phone, tablet or PC.

Local studies books

This work has now allowed us to expose the author and subject indexes from the library catalogue for the first time. We have already seen that this actively encourages users to browse and discover other related titles of interest. We linked the data to the free Google Books service, but were disappointed at the low number of book covers that are displayed. We might investigate one of their paid services for this feature.

We were also able to introduce a link to the Hull City Council library system. Having found an item of interest in the local studies material on the HHC catalogue, a user is able to see if the item is available in any of the libraries across the city. We have also used this 'availability' box to highlight archival material that cannot be consulted for legal or conservation reasons.

Archive collection

We discovered the option of offering users the ability to search just our collection level data. This is useful, especially for students looking to identify collections that are relevant to their research topic. For example, a search of the entire catalogue for Philip Larkin returns over 9,000 results. Use the format facet to restrict the search for items where format is 'archive collection' and the number falls to 66, which is far more manageable.

We also decided to adopt a different style to present the collection level information, simply because this element contained so much text. This also allowed us to add a link to the PDF version of the catalogue, as we knew that many of our users found this an easier way to find the information for which they were looking (especially in our larger family and estate collections).

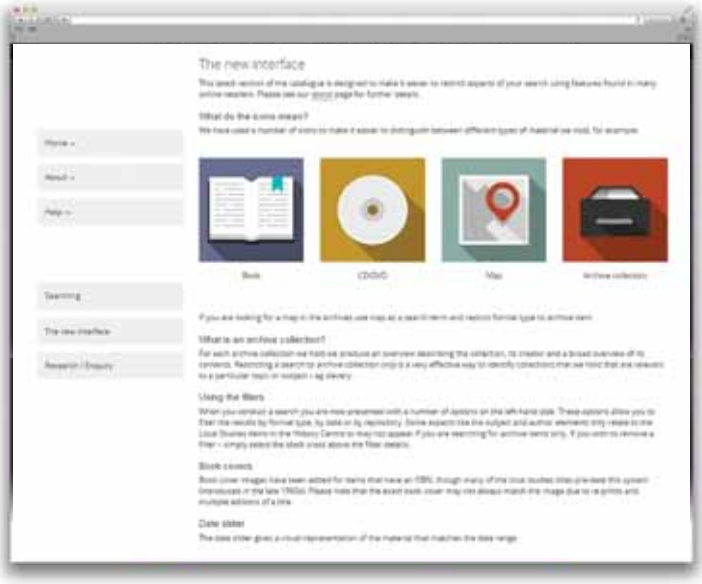
Date slider

Blacklight is open-source software, which meant we were able to look at other iterations of the software and use features that had been developed by other libraries. The best example was the date slider, which adds a touch of fun to filtering by date (users will be familiar with this tool from online retail websites). It also gives a representation of the number of items in the catalogue across that period. During testing, we found that the date slider highlighted items from the Roman period and from many centuries into the future. These and other data anomalies were quickly corrected, though it is likely that some have been incorrect for years.

One of the most visible elements of the new interface is the colourful icons to distinguish between different types of local studies material, such as CD / DVD, microfilms and maps. To keep this simple, all items for the archives are given icons to represent either 'archive items' or 'archive collections'.

New address

Although the data is the same, the new interface represents a huge step forward for us, with new features and much better integration of the library data. We are now able to update this every month, and each archive collection is exported from the Calm system as EAD. Blacklight is already integrated with the University of Hull's digital repository – an element we will be exploiting over the next few years as we look to make digitised and born-digital content available.



Revised help page explaining use of icons, HHC. Image copyright HHC.

The new interface can be found at: http://catalogue.hullhistorycentre.org.uk

Simon Wilson
Senior Archivist, Hull History Centre

Archives and Minecraft: the HullCraft project

You are possibly wondering how computer games can be used with archives? One answer to this question is a project called HullCraft, a collaboration between the University of Hull and the Hull History Centre (HHC). The aim of HullCraft is to engage young people with archival material by recreating architecture and artefacts from the collections at the HHC by using Minecraft.

What is Minecraft?

Minecraft can be described as digital LEGO. It is a computer game where players can place and break blocks, enabling them to modify and explore open, virtual worlds. Players can build alone or collaboratively with others on an online server. The creative possibilities are endless, opening up new pathways for learning.

Minecraft has become a cultural phenomenon, appealing particularly to teenage gamers, with over 54 million licenses sold on several platforms since the game was launched in 2009. In September 2014, Microsoft purchased Mojang, the developers of the game, for $2.5 billion.

Heritage organisations, such as the British Museum and Tate, are beginning to realise Minecraft's potential as an engagement tool for built heritage, historical artefacts and art. For archives engagement, the virtual world allows players to explore beyond imagery and text, offering new ways of learning through participation and 3D visualisation.

Where did the HullCraft idea come from?

In December 2013, the University of Hull archives at the HHC secured an award from the National Cataloguing Grants Programme to fund the cataloguing of material belonging to the Yorkshire architect Francis Johnson. In the summer, Project Archivist Claire Weatherall and colleagues used LEGO as a way to engage families with the Francis Johnson collection and architecture in general. Then Joel Mills, Technology Enhanced Learning Advisor at the University of Hull, suggested we could also use Minecraft to extend the involvement with the local community beyond the LEGO family days, and engage younger audiences with the work and collections at the HHC.

Phase one: HullCraft website

For the first phase, we digitised some of Francis Johnson's architectural plans and made these accessible

View of the HHC recreated in HullCraft. Image copyright HHC.

The Georgian quarter in HullCraft built by players and inspired by Francis Johnson. Image copyright HHC.

(as images and PDF files) on the HullCraft website. The players could download these plans, recreate the buildings on their own version of Minecraft, and submit a screenshot to the HullCraft website for display in the online gallery. The more archive buildings a player creates, the more achievements they receive, gaining a virtual badge to display to friends when they complete specific tasks.

Phase two: HullCraft world

With the success of phase one, we began phase two where we purchased and developed an online Minecraft server as a space for players to work collaboratively on builds. The multiplayer function is useful for enabling players to develop their teamwork and negotiation skills through working with others on joint builds, but can also introduce new problems. To solve this, we used plugins to modify and secure the game to prevent 'griefing' (the destruction of other player's creations with malicious intent), and introduced a whitelist based on player's usernames to control access to the server.

It was important that archives and the HHC were central to the HullCraft world, so on entry to the server the player begins their journey at the HHC reception desk. The building can be explored in full, from the glass arcade and the Local Studies Library, to the search room and lecture theatre. Upstairs, the player will encounter the archives storerooms just like the real-world HHC.

The reconstruction also acts as a hub where the player can travel through portals into other areas of the server. They can be assigned plots of land to build and interpret their archive document, and their finished builds will be showcased as a community-built reconstruction of Hull's past periods.

We are aiming for players to engage with the architectural plans by translating space, proportion, dimensions, material and style into 3D buildings that can act as a virtual historical record, and can be used for research purposes. Players gain a greater knowledge of Francis Johnson's architectural style and develop their problem-solving, self-efficacy and evaluation skills along the way. To evidence their learning, we are hoping that players can reflect on the construction of their builds through blog posts, YouTube curatorial tours, and video logs.

The future

We have recently secured funding to run workshops at the HHC with students working together as a class on builds. There is also the potential for university departments to be involved by creating interesting content to facilitate learning, or even to use the existing builds as research tools.

We are also looking beyond the Francis Johnson collection to others held in the archives, as a result having several themed worlds from Hull's past. We will also expand to a wider variety of resources for players to engage with, such as digitised books, photographs and audio.

The project has been successful in making archives more accessible through technology and embracing the players' creativity to use archival collections to create virtual reconstructions. It will be interesting to see how the HullCraft

View of the library in the HHC. Image copyright HHC.

> *Heritage organisations, such as the British Museum and Tate, are beginning to realise Minecraft's potential as an engagement tool for built heritage, historical artefacts and art.*

project will evolve as more participants take part and more buildings are constructed. Above all, we are hoping it will inspire the younger generation to view archives as treasure troves for interesting historical content, and encourage them to use the service in the future. We would be interested to hear from other archive services that are already using, or thinking of using, Minecraft with their collections.
For further information see:
HullCraft website: www.hullcraft.com

Hull History Centre blog:
www.hullhistorycentre.blogspot.co.uk

Minecraft: www.minecraft.net

Hannah Rice
Transforming Archives Trainee, HHC

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A European venture: the Archives Portal Europe

Back in January 2013, I became the Country Manager for the UK on the Archives Portal Europe (APE):

www.archivesportaleurope.net

The title sounded good…but what did the role involve? Unfortunately (or perhaps fortunately), I do not get to make decisions about managing the country, but I do get to represent the UK in APE. I also work to get descriptions of collections into the portal so that researchers have another route into UK archives.

APE represents 32 countries (at the last count, although it may be more by the time this goes to press). It is a great way for European archivists to collaborate, share ideas and experiences, and bring together the descriptions of their collections for the benefit of research.

The UK participates in the APEx project, which is defined as a network of excellence aimed at expanding, enriching, enhancing and sustaining APE:
www.apex-project.eu

As the Archives Hub Manager, I took on the role of Country Manager on the basis that we could provide descriptions to APE from the Hub:
www.archiveshub.ac.uk

The Archives Hub already aggregates descriptions from over 260 institutions. Both the Archives Hub and APE work with EAD (Encoded Archival Description), so this was going to be a good test of the latter's efficacy as a data exchange format. The image here shows the results of a basic search for 'Shakespeare' in APE.

The first step as Country Manager was to create the 'archival landscape', listing the repositories within the UK directory. For the UK, we decided to divide into types such as university, specialist and museum archives, as this seemed to be the most useful for researchers (it means they can, for instance, search just university archives). Other contributors, such as the Netherlands, divide by region. It became clear to me whilst I was working on the landscape that a consistent approach across countries would be hard to achieve, as the political and administrative structures of each country are different.

The second step was to become familiar with the tools used by APE. The most important interface is the dashboard. It has a whole load of functionality for searching, filtering and checking. I use the content manager to upload files to the dashboard, then I convert, validate and publish them. APE also provides a local environment that is useful if you want to prepare the data. The second image shows the dashboard, with a list of files and their current status.

The third step was to start uploading data, which I have been doing over the past year. In order to upload data, each Hub contributor has to create a directory entry for their repository. Once that is done, their EAD descriptions can be zipped up, uploaded to the APE dashboard, and processed. The fourth step is to think more about automation and version control, which is presenting a number of challenges.

The Country Manager usually has the role of supporting institutions uploading content. They provide training and documentation and act as a helpdesk. However, because we already have aggregated data, we upload content on behalf of institutions that already contribute to the Hub (unless they wish to do it themselves). It is important to follow the principle of 'one description shared many times', rather than expect institutions to supply descriptions to different services.

The APE dashboard shows you the progress of the descriptions. You can see whether they have been converted, validated and published. If all goes to plan, the text is green (green is good!). The issues come where part of the process fails and you get a rather startling FATAL ERROR (in red, which is bad). You get an explanation for the error, but it tends to be in EAD speak, so it requires a good grasp of EAD markup.

Results of a basic search for 'Shakespeare' in APE. Image copyright APE.

APE dashboard with a list of files and their current status. Image copyright APE.

> *"Overall, probably 90% of our data has transferred into APE without any issues...it is always the 10% that keeps us busy!"*

When we come across issues with the EAD, we work with APE to resolve them. Sometimes APE has stricter constraints on the EAD than the Hub has, often justifiably, and in fact we have often improved the data by responding to APE error messages. On other occasions, we need to contact APE colleagues and ask for changes to their stylesheet, allowing our EAD to be accepted. This has been quite an involved process, as EAD is quite permissive and variations are common. We have had a number of issues to deal with, including invalid archival level values, incompatible reference

codes, omission of content within certain tags, formatting issues with certain content, and problems with internal links between descriptions. Overall, about 90% of our data has transferred into APE without any issues…it is always the 10% that keeps us busy!

The biggest challenge now is to ensure that we have a consistent workflow so that we do not end up with several different versions of the same description. If we fiddle with a description to get it accepted into APE, do we apply the same changes to the Archives Hub version, and how do we ensure that the contributor does not send a revised version that overwrites the changes? We need a consistent approach that enables us to work effectively with both new and revised descriptions, and successfully integrate them into both the Hub and APE.

We are continuing to work on these issues. Meanwhile, we currently have 68 institutions from the UK represented in APE, and we hope to increase that to 100 by March 2015.

If you would like to find out more, please take a look at our APE page: www.archiveshub.ac.uk/ape

Jane Stevenson
Manager, Archives Hub
UK Country Manager, APE

International Conference on Preservation of Digital Objects (iPRES) 2014

Thanks to the generous support of ARA and my employers the Parliamentary Archives, I was delighted to experience my first iPRES conference in Melbourne. I am sure many of you are already familiar with iPRES and its aims, namely the gathering of digital preservation practitioners from across the globe. Previous incarnations have had the reputation of being quite academic, but I was pleased to discover that this year's conference provided a healthy mix of practical and academic disciplines.

With the beautiful State Library of Victoria acting as the venue for the week, it was an excellent opportunity to exchange ideas. Having attended a variety of excellent conferences and events, iPRES provided a unique opportunity to debate, develop, and demonstrate contemporary best practice.

The opportunity to meet practitioners from the other side of the globe was undoubtedly one of the highlights

"I am sure many of you are already familiar with iPRES and its aims, namely the gathering of digital preservation practitioners from across the globe."

of the event. Despite the diversity of attendees at iPRES, question marks remain over how to involve and appeal to new audiences. Many delegates attended from Australia and New Zealand, but it was surprising how few institutions from Asia were represented. Wider efforts also need to be made to ensure participants who cannot attend the conference can play their part and benefit from iPRES too. Despite these notes of caution, it was fantastic to see passionate debate and enthusiasm displayed across a wide variety of digital preservation topics.

One particular innovation of iPRES 2014 was the systems showcase. An encouraging sign in the profession is that competing software providers now have off-the-shelf systems which can assist both small and large organisations in digital preservation. Providers were given the opportunity to showcase their respective solutions by following a set script and standard test data. Delegates were able to see DSpace, Archivematica, Repository of Authentic Digital Objects (RODA), Preservica and Rosetta in action and ask questions. A great idea, and with a bit of further tweaking, the showcase could become a real highlight for practitioners in further years.

Despite the advances in the variety of repository software available, there remain outstanding challenges which we must address. Principally, the need to continually justify digital preservation is a particular concern. This challenge is faced across the archives profession, but it is the immediacy of digital content which brings these issues into sharp contrast. Many delegates expressed anxiety about having to repeatedly advocate the need to preserve digital material, even in large organisations. In my opinion, this suggests an underlying problem with the digital preservation profession that has yet to be resolved – how can we justify investment in time and resources in an abstract problem when the benefits are not immediate? I am afraid I have no magic answer, but the language and message we use to advocate digital preservation needs to be crystal clear for the non-initiated if progress in digital preservation is to be maintained.

I always feel refreshed after attending a particularly engaging event, and iPRES in Melbourne was no exception, even after a 30-hour journey home! There

“Despite the advances in the variety of repository software available, there remain outstanding challenges which we still have to address. Principally, the need to continually justify digital preservation is a particular concern.”

are a number of practical initiatives which I have already begun to put in place at the Parliamentary Archives as a direct result of attending, along with a range of new people to bounce ideas off. Initiatives include developing risk-based approaches and improving the Parliamentary Archives capacity to preserve and provide access to digital records. It is apparent that digital preservation still has significant challenges to overcome, but it is a mark of progress that these challenges involve practitioners establishing preserving digital material as a business as usual activity across the world.

Christopher Fryer
Senior Digital Archivist, Parliamentary Archives
Training Officer, ARA Section for Archives and Technology

Email: fryerc@parliament.uk

Calling all colleagues!

ARC is always seeking articles reflecting the issues that matter to you most. We would love to publish pieces that reveal the sector’s opinion and showcase successful best practice.

If you would like to send something for inclusion in the magazine, please send articles to arceditors@archives.org.uk, or write and let us know what you’d like to read about. Guidelines for articles for *ARC* can be found on the Association’s website: www.archives.org.uk.

www.archives.org.uk

Adlib to Calm: a tale of two systems

Over the past year, the mapping and migration of data from Adlib to Calm has been planned, prepared, reviewed and finally delivered at Dorset History Centre (DHC).

The migration was partly prompted by DHC's investigation into digital preservation solutions and our chosen provider (Preservica) developing a tool to synchronise metadata with Calm. We seized the opportunity to include the switching fee in our business case for a digital preservation pilot. It helped that an update to the version of our cataloguing system was well overdue. DHC acquired Adlib in 2001 when electronic archive cataloguing systems were in their relative infancy. Over time, our Adlib system had seen several upgrades and had data imported from several different legacy systems. Imported data did not always conform to house standards, data checking had been haphazard, and staff turnover had resulted in the same field being used for different purposes. Plus there had been a couple of instances of the system's language settings defaulting to Dutch!

> *"Retrospectively, it would have been useful to have had more time familiarising ourselves with the functionality and layout of the new system before and during the planning and field mapping phases."*

DHC logo. Image copyright DHC.

DHC search room. Image copyright DHC.

With the funding agreed, we put together a project plan and Gantt chart to illustrate the expected timescales. We knew it was crucial to obtain a commitment of resources from Dorset County Council's IT support from the start of the project. Unfortunately, this was not possible due to the Council's IT resources being already over-stretched and the subject of a re-structure. This meant that the process was delayed at times whilst we waited for communication or action from our IT support. Frequent encouragement seemed to be required to keep up momentum, especially through changes in personnel. Getting Axiell and IT to communicate both with DHC and each other proved challenging throughout the project.

Another challenge was the varying degrees of familiarity with Calm among the archivists at DHC. Retrospectively, it would have been useful to have had more time familiarising ourselves with the functionality and layout of the new system before and during the planning and field mapping phases. Once Calm was installed and fully functional, it took us some time to work out whether errors were the result of our lack of familiarity or a fault in the set-up of the system. We have experienced difficulties with some elements of Calm, such as changing standard templates that are now controlled by our IT department, but were managed in-house with Adlib. Fortunately, we have found the help desk at Axiell quick to respond to queries, however simple or silly they may seem!

The introduction of the new cataloguing system has also bought several opportunities and benefits, apart from having a shiny new system. We undertook a substantial amount of data-tidying to address issues such as duplication of data across several fields and the excessive length of some instances of the 'title' field. We have also standardised the entry of dates to enable exploitation of the wonderful date functionality in Calm. DHC staff are particularly delighted by the ability to sort search results by date – a function lacking in our previous version of Adlib. Although time-intensive, the result of this data-tidying work is that our catalogue descriptions are now more user friendly and the data more consistent. Users will benefit from this through a new online catalogue which is more dynamic than our previous portal, with the ability to include 'featured archives' and give users more help in their discovery of our collections.

"Users will benefit from this through a new online catalogue which is more dynamic than our previous portal, with the ability to include 'featured archives' and give users more help in their discovery of our collections."

The arrival of Calm also gave us the opportunity to review our current procedures for accessioning and cataloguing. The process of mapping fields from Adlib to Calm forced us to think about the information we were capturing and what we actually need. We managed to reduce the number of fields used in the catalogue database from almost 70 to 35 by removing fields capturing information recorded elsewhere and those made redundant by the way Calm works. The refreshed procedures should prove particularly useful in the coming months as we welcome new archivists to the team for various cataloguing projects.

Although the project took longer than planned, we are pleased with the outcome, and work to embed the new system into our activities is progressing well. This includes integration with our digital preservation system, Preservica, which we envisage eventually allowing users to seamlessly access digital archives online via our catalogue.

Cassandra Johnson
Archive Service Officer (Digital Preservation), DHC

Archivists and Wikipedia: some research and recommendations

This article summarises two recent pieces of work undertaken by the Archives Association of Ontario (AAO) in relation to Wikipedia. The first was a survey of archivists in Ontario, Canada, to see how they perceived the online encyclopedia and how they were using it. The second was an investigation into existing links from Wikipedia to the AAO's Archeion website, leading to recommendations on formatting Wikipedia links to archival materials.

Archivists' use of Wikipedia

The AAO conducted a survey in March 2014 on the use and perceptions of Wikipedia by archivists in Ontario. More than half of the 54 respondents use the site often, with just 7% of respondents replying 'rarely' to this question. People who were frequent users of Wikipedia rated the site more highly for usefulness and reliability than those who use it rarely.

Just over half of respondents had never edited a Wikipedia article. 2% of the group edited articles regularly, while the remaining 47% were occasional editors. Half of the archivists had not considered adding links to their resources to Wikipedia, but 15% were thinking about doing so, and over a quarter had already added links from Wikipedia articles to online archival materials.

Analysis of links from Wikipedia to Archeion

The AAO maintains Ontario's online archives network, Archeion: www.archeion.ca

As part of this research, Wikipedia referrals to archival descriptions in Archeion were analysed. This revealed a relatively low referral rate: only 1% of all Archeion users in 2013 came from Wikipedia. Of these, 95% were new visitors to Archeion and on average they visited five pages of the site after landing there.

Samples of the linked articles are listed in the accompanying table, with the text of the link to Archeion. There is an unsurprising inconsistency of style in the links added by different people over a number of years. Some of them mention Archeion, but only one of the links names the archives-holding institution, and none of them refer to the AAO, which provides the Archeion service.

Wikipedia guidelines

Anyone can create an account on Wikipedia and edit its pages. It should be noted that the encyclopedia has fairly strictly-enforced rules on adding external links, and in the past some archives and libraries have overstepped these. Wikipedians object to mass insertion of links by individuals who are relatively new to the site and whose activity is perceived as bordering on spamming. However, adding links and information to Wikipedia is an effective way of promoting archival resources. Formatting references in a consistent way can help to promote the institution which holds the archival material, and to make the connection between the institution and its curatorial role clear to Wikipedia users.

The next section of this article proposes a template for a consistent way of formatting citations to archival resources in Wikipedia, using Archeion descriptions as examples.

Adding a reference

The best practice for adding links to descriptions of archival materials is to edit the main body of a Wikipedia

Sample of Wikipedia articles with text of the link to Archeion

Wikipedia article	Text of link to Archeion
Ashburn, Ontario	Archeion, Fonds CONG-21 - Burn's Presbyterian Church (Ashburn, Ont.) fonds, accessed March 17, 2012
Elizabethtown-Kitley	Kitley Twp Archival Records
Fort Frontenac Library	Origins of the Canadian Army Staff College/Fort Frontenac Library Retrieved 2011-12-19
Kashruth Council of Canada	"Ontario Jewish Archives". *Archeion*. Retrieved 6 March 2012.
Windsor Police Service	www.archeion.ca/windsor-police-services-board-and-windsor-police-services-fonds;rad

> *Formatting references in a consistent way can help to promote the institution which holds the archival material and to make the connection between the institution and its curatorial role clear to Wikipedia users.*

article with information taken from the archival resource, and create the link in the form of a reference.

The recommended format in Wikipedia mark-up for such references – using an Archeion record as an example – is as follows:
<ref>{{cite web |author=Archives of Ontario |url=http://www.archeion.ca/m-nicholson-fonds |title=Alexander Malcolm Nicholson fonds |website=Archeion |publisher=Archives Association of Ontario |accessdate=2014-01-25}}</ref>

An entry like this will create a footnote in the references section of a Wikipedia article which appears like this:
References
1. Archives of Ontario. "Alexander Malcolm Nicholson fonds". Archeion. Archives Association of Ontario. Retrieved 2014-01-25

Adding an external link

It is also possible to add to the external links section of a Wikipedia article. The format for making a link within this section is as follows:

==External links==

*{{cite web |author=Archives of Ontario |url=http://www.archeion.ca/w-j-loudon-fonds |title=W.J. Loudon fonds |website=Archeion |publisher=Archives Association of Ontario |accessdate=2014-01-25}}

This text will appear on the Wikipedia web page as:
External links
- Archives of Ontario. "W.J. Loudon fonds". Archeion. Archives Association of Ontario. Retrieved 2014-01-25.

Existing links to Archeion within Wikipedia were standardised in this format during the course of this investigation. Since doing so, referrals from Wikipedia doubled in 2014 compared to the same period in 2013 (now 2% of Archeion users), and Wikipedia is the ninth biggest source of referrals to Archeion. This is something we hope to build upon in the future.

Amanda Hil
Archeion Co-ordinator, AAO

Wikilinks: assessing the impact of creating links to the Archives Hub from Wikipedia

Between March and June 2014, I conducted a piece of social media-oriented research on behalf of the Archives Hub, the primary purpose of which was to measure the impact of adding links from specific Wikipedia articles featuring Hub content on the traffic that comes into the Hub website. The research also provided Hub administrators – and (it was hoped) the profession as a whole – with a gauge as to whether the amount of time invested in creating links is worthwhile when compared to the benefits of impact. This research benefited me personally in that it allowed me the opportunity to potentially earn credits on the ARA Registration Scheme.

The first phase of the study involved identifying 20 collections listed in the Hub, with no existing links to related Wikipedia pages, which I could treat as measurable research subjects. This was done simply by entering specific Hub collection level descriptions into the Wikipedia search engine. If a link to the Hub had already been created, I eliminated that particular collection from the study. In order to achieve a fair and balanced piece of research, I selected collections of a relatively similar size and status, and avoided those relating to any significant public events running concurrent to – or immediately prior to – the commencement of the research, i.e.

"This research benefitted me personally in that it allowed me the opportunity to potentially earn credits on the ARA Registration Scheme."

local elections in England or the World Cup. My feeling was that such collections could have been subject to closer scrutiny from researchers while the study was underway, which, in turn, would have resulted in an unexpected increase in Hub-searching activity. This, in essence, would have undermined the credibility of the study. I also made sure that the Wikipedia pages I utilised did not already include links to the collection-holding repositories, as this could potentially sway researchers away from clicking the newly-created links to the Hub descriptions, thereby affecting the accuracy of research.

Once the Hub collections and related Wikipedia pages had been identified, I added new links to the individual pages using Wikipedia's editing tool. In the interests of consistency, I embedded each new link in the 'external links' section on each of the pages I modified. I then used Google Analytics, in conjunction with an Excel spreadsheet, to collate and record Hub traffic data for each individual collection for the 12-week period prior to the start of the study, specifically from 22 December 2013 to 15 March 2014. This was done in order to enable me to generate a measurement of the overall impact of the newly-created links on incoming Hub traffic. Over the course of the next 12 weeks, from 17 March to 7 June 2014, I used Google Analytics once again to monitor incoming Hub traffic, with a reading being taken at the end of every fourth week in order to identify any significant traffic fluctuations or changes. The four-week hit statistics for each of the 20 collections are shown in the accompanying table.

At the end of the 12-week research period, it was evident from the accumulated data that 14 of the 20 collections had each experienced an increase in traffic compared to the previous 12-week period. Indeed, two of the 14 collections – namely the Ramsay MacDonald Papers and the London South Bank University Archives – each received well in excess of 100 additional hits compared to the pre-link period. Of the remaining six collections, only the Sadler's Wells Theatre Archive had decreased in hits significantly, down 109 from the previous period. The cumulative number of hits for each of the 20 collections during the research period is presented in the second table. This table also shows the positive and negative numerical differences in hits for each of the collections compared to the 12-week period prior to the start of the research.

Ultimately, this study demonstrated that the simple task of linking online archival descriptions to Wikipedia can yield extremely positive results. It showed, moreover, that there are clear benefits, both for the archival repository and the individual researcher, when catalogue data is linked and shared. It also proved that a successful outcome can be achieved in a relatively short space of time, and with only a small amount of physical effort. The process of checking whether links from specific Hub collections already existed in Wikipedia and then adding them to the website if they did not, took little more than three hours to complete. This basically involved me copying data from one website and pasting it onto another. The sheer simplicity of this exercise, coupled with the knowledge that interest in the vast majority of the Hub collections increased as a result of the Wikipedia editing, confirms that archive services the world over – especially those blessed with a healthy number of volunteers – would benefit from embarking on linked data projects of this nature. For, as Benjamin Franklin once said, "An investment in knowledge always pays the best interest."

Andrew Young
Records Manager, Doncaster Metropolitan Borough Council

Hub Collection Description	Hits Between 17/03/14-13/04/14	Hits Between 14/04/14-10/05/14	Hits Between 11/05/14-07/06/14
New Statesman Archive, 1944-1988	12	10	9
Rugby Football League Archive, 1898-2002	17	19	22
Papers of Nightingale, Florence, 1820-1910	22	11	11
Records of Barclays Bank Head Office Departments, 1896-1985	12	8	11
Environment Agency Collection, 1786-2010	67	41	40
Marie Rambert Collection, 1890s-1980s	28	28	10
Sir Liam Donaldson Collection, 1959-2010	69	32	36
Archives of the Anglo-Jewish Association, 1871-1983	8	5	3
The Cadbury Papers, 1884-1970	36	21	17
National Jazz Archive Collection, 20th Cent.	7	6	2
Ramsay MacDonald Papers, 1893-1937	16	68	14
Sadler's Wells Theatre Archive, c1713-2012	83	86	140
Papers of Robert Graves: Correspondence, 1913-1986	43	33	41
British Petroleum (BP) Archive, 1753, 1840-2001	28	7	5
The George Gissing Collection, 1870-1999	30	21	12
London South Bank University Archives, 1871-Present	109	107	71
Records of Newcastle Breweries, Ltd, 1913-1993	5	3	4
Barbara Hepworth's Sculpture Records, 1925-1975	13	12	13
Correspondence of Sir Walter Scott, with related papers, ca. 1807-1929	9	7	10
Correspondence of Charles Dickens, with related papers, ca. 1834-1955	34	16	11

Hits for Archives Hub collections during the Wikipedia study

Hub Collection Description	Hits Between 22/12/13-15/03/14 (12 weeks)	Hits Between 17/03/14-07/06/14 (12 weeks)	Hits Difference
New Statesman Archive, 1944-1988	14	25	+11
Rugby Football League Archive, 1898-2002	55	56	+1
Papers of Nightingale, Florence, 1820-1910	18	44	+26
Records of Barclays Bank Head Office Departments, 1896-1985	14	31	+17
Environment Agency Collection, 1786-2010	176	148	-28
Marie Rambert Collection, 1890s-1980s	7	66	+59
Sir Liam Donaldson Collection, 1959-2010	82	137	+55
Archives of the Anglo-Jewish Association, 1871-1983	12	16	+4
The Cadbury Papers, 1884-1970	30	74	+44
National Jazz Archive Collection, 20th Cent.	28	15	-13
Ramsay MacDonald Papers, 1893-1937	46	178	+132
Sadler's Wells Theatre Archive, c1713-2012	418	309	-109
Papers of Robert Graves: Correspondence, 1913-1986	118	117	-1
British Petroleum (BP) Archive, 1753, 1840-2001	22	40	+18
The George Gissing Collection, 1870-1999	83	63	-20
London South Bank University Archives, 1871-Present	169	281	+112
Records of Newcastle Breweries, Ltd, 1913-1993	16	12	-4
Barbara Hepworth's Sculpture Records, 1925-1975	16	38	+22
Correspondence of Sir Walter Scott, with related papers, ca. 1807-1929	14	26	+13
Correspondence of Charles Dickens, with related papers, ca. 1834-1955	30	61	+31

Cumulative hits for Archives Hub collections, including positive and negative differences

Cataloguing born-digital material event, November 2014

Cataloguing born-digital material is something with which many ARA members are starting to grapple. The idea behind this event was to both share emerging practice in this area and to identify some of the main issues and problems that are arising, with a view to working out ways to tackle them collectively. Places were snapped up very quickly, and the morning began with presentations describing work already being carried out in a variety of institutions. Slides from the papers can be found on the ARA Section for Archives and Technology (SAT) web pages, along with a more detailed record of afternoon workshops: www.archives.org.uk/about/sections-interest-groups/archives-a-technology/news-and-events-sp-1847188959.html

The account that follows is a personal reflection structured around the ideas that stood out for me.

Challenges to traditional ways of working and thinking

One of the biggest messages that I took away from the event was that the experience of working with born-digital material is forcing us to re-examine how we interpret principles such as original order, and how we sequence and characterise our activity. For example, to ask the question 'Do we need to arrange things?' would have been considered professional heresy not too many years ago. More practically, another question that was asked was about the workflow from accessioning to arrangement and description. Does it still work or flow that way when accessioning means ingest and the automatic creation of description through metadata extraction? Post-accession weeding and re-arrangement was a lot easier when the accessioning process did not involve importing the material into a (digital repository) system specifically designed to preserve that accession in the (original?) order in which it was ingested.

When trying to identify the nature of these challenges, another major theme was that of scale. Traditionally, one of the main ways in which we dealt with the issue of 'too much stuff' was by dealing with it on one or more aggregate levels – the file or the series. However, the nature of born-digital material seems to demand that we deal with it more at item level. Practically, this causes particular problems for sensitivity review and appraisal, with speakers noting that although it was possible to use tools such as DROID to identify and weed out duplicates and temporary files, and that there was some awareness of tools which allowed for the automated discovery of certain key phrases or patterns (such as credit card numbers), this was by no means a solved problem.

Working with donors

Partly because of the issue of scale, but also because of the perception that digital material is somehow 'messier' than paper, there was discussion about placing more onus on working with depositors so that they could do the necessary work to get their material into a fit state prior to deposit. This also related to the question of sensitivity, since born-digital material does tend to be more recent, and hence perhaps at more risk of being sensitive. To some extent, this was seen to be about educating depositors, but also perhaps about sharing the burden of responsibility with them. One suggestion was that the donor should be asked to sign something saying that they understand that the archive will do all it can to prevent sensitive material being released, but they accept that it cannot be guaranteed. This idea of early intervention also surfaced in discussions of the interface between cataloguing and records management. A number of people wanted to know if there was an EDRMS that could produce an export that was easily transferable into an archival system, and Anthea Seles outlined the minimum metadata set that The National Archives (TNA) has set out for government departments when transferring born-digital records.

Working with users

Another issue raised was the fact that we do not really know what users expect or want with regards to working with born-digital material. Indeed, it was the experience for some that even when you asked them, they did not really know, because it was all new to them too. It was suggested that we needed to start supporting users a lot more in working out how to understand what they were looking at. Clearly, this is not a new issue, but it does

perhaps take on an added dimension of difficulty when we are still not entirely sure ourselves. Then again, there was a sense that we did tend to still think about access in terms of access to documents rather than data, perhaps failing users interested in new forms of use such as data mining. Finally, on an ethical note, questions were also raised about the assumption that everyone has access to the internet and that online access is therefore open to all.

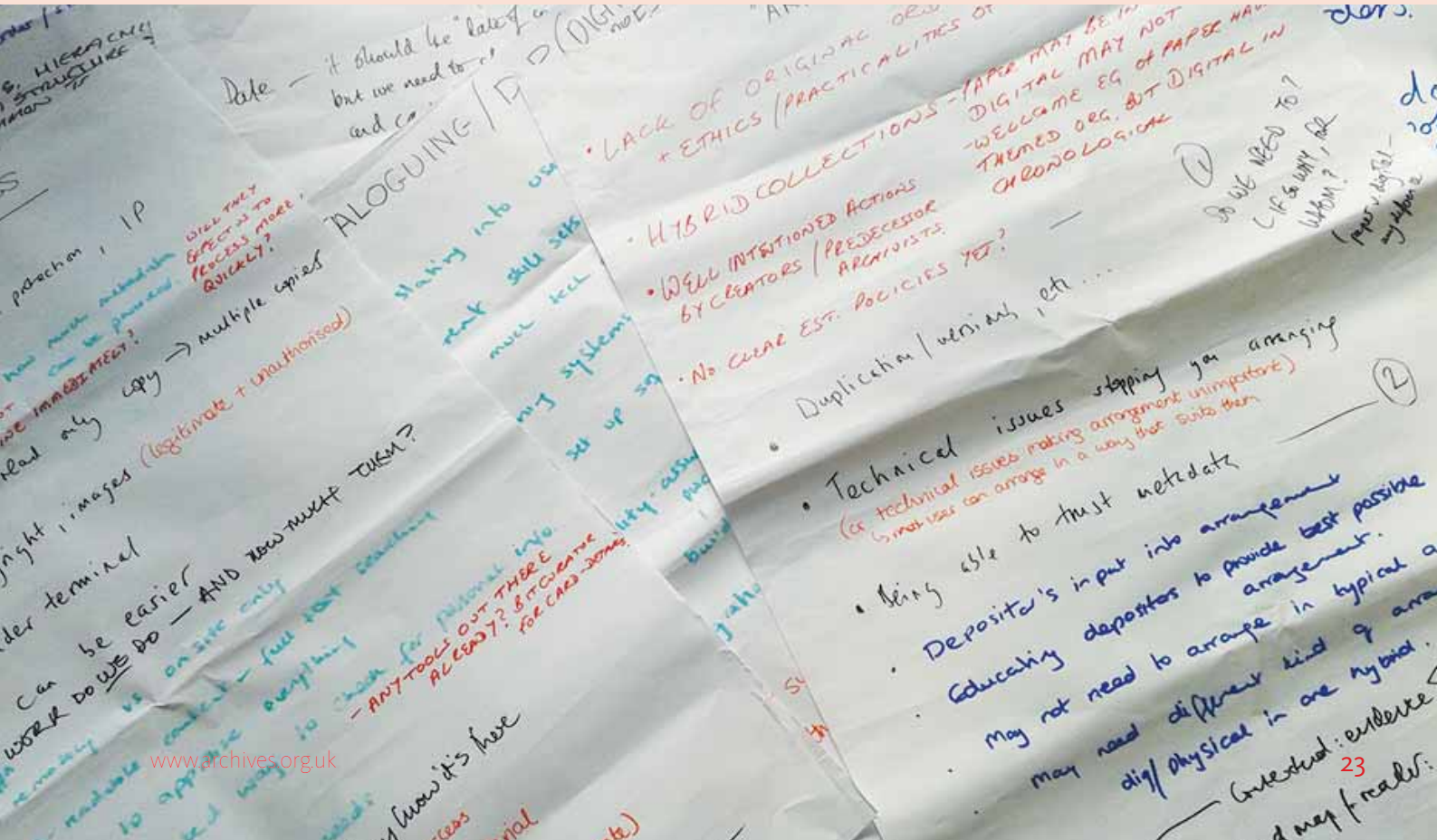
Problems with ISAD(G)

Given that ISAD(G) is the most visible and concrete expression of traditional descriptive (and arrangement) practice, and given that this practice is being challenged by the realities of dealing with born-digital material, it is perhaps unsurprising that the standard came in for some criticism. The general feeling seemed to be that it is not the 'complete' solution to collections management, preservation and access that it was once. A number of speakers highlighted digital repositories (using systems such as Preservica, Archivematica and E-Prints) which were being run in parallel with traditional collections management systems such as Calm or Atom. Another option was to add additional fields to the 26 ISAD(G) ones in Calm, in order to either facilitate the synchronisation between systems, or to accommodate more fine-grain information about the date of digital material. The consensus seemed to be that a distinction was emerging between technical metadata (held in the digital repository system and not generally made public) and descriptive metadata (held in the catalogue and used to provide access).

Next steps

First, there is the possibility of re-running the event outside London, for which some demand has already been expressed. Secondly, the results of the day will be disseminated as widely as possible and comments and feedback sought from across the profession and beyond in order to feed into future actions and plans. Ideas already under consideration are a 'field amnesty', during which institutions can confess to any additional fields with which they have supplemented ISAD(G). We could also develop an online version of ISAD(G) called ISAD(eg), where individual institutional practice could be collated to produce what might act as a crowd-sourced content standard for the UK. Plans are afoot for closer collaboration between ARA SAT and the UK Archives Discovery (UKAD) Network, and it is hoped that many others will be involved going forward. It is clear that cataloguing born-digital material is an issue of real and current relevance to the profession, one which brings many challenges and one which it clearly makes sense to tackle together. That is – and will remain – the driving force behind our work in this area.

Jenny Bunn
Teaching Fellow, University College London



Investing in Opportunity conference, Wellcome Trust, London

Investing in Opportunity: policy practice and planning for a sustainable digital future

November saw the culmination of two years of work on the Collaboration to Clarify the Costs of Curation (4C) Project. The Investing in Opportunity conference held at the Wellcome Trust in London showcased a range of resources and addressed everything you need to know about the economics of digital curation.

Organised jointly by the 4C Project and the Digital Preservation Coalition (DPC), the conference compared the strategic economic aspirations of funders and policy makers against the practical experience of digital preservation. It provided perspectives from practitioners, vendors and users of digital preservation services.

Participants were invited to review key 4C Project deliverables, namely the project roadmap and the Curation Costs Exchange (CCEx). They were also asked to consider the implications of these resources before they are submitted to the European Commission next year. Attendees praised the "mix of presentations and workshops, enabling lots of useful conversations", as well as commending the way the two-day event brought together the digital curation community for "great debate and lively discussion."

Investing in curation: a shared path to sustainability

Presented as a set of six messages, and available now for public review and comment, the 4C Project roadmap considers the actions necessary to achieve a change in the way that all organisations think about and sustainably manage their digital assets.

"This change may well be achieved with greater transparency around the supply and demand of curation services," says Ingrid Dillo of the Data Archiving and Networked Services (DANS) in the Netherlands. "This would certainly foster a healthier and more effective marketplace for services and solutions, and provide a more robust foundation for tackling future grand challenges."

Resources for tackling this challenge may be found in some of the critical outputs from the 4C Project,

signposted by the roadmap and designed to support a broad range of stakeholders. Agreeing with the roadmap's vision, one attendee noted that "embedding digital preservation is key," with another adding that collaboration is absolutely "necessary for institutions who don't have the money, time or resources to do this all themselves."

Supporting smarter investments by comparing digital curation costs

The CCEx is a framework of useful information designed to help anyone who creates or curates digital content, or funds the process, to make smarter investments in digital curation:
www.curationexchange.org

In an unprecedented fashion, the CCEx encourages its users to be bold and share their cost data, and in return they are rewarded with cost information on their peers. The idea being, the more we share the more we learn.

The cost comparison tool or 'compare costs' sits at the heart of the CCEx and enables this exchange of sensitive data, providing the opportunity to identify greater efficiencies, better practices and valuable exchanges of information between peers. Praising the CCEx, one conference attendee remarked on the "great value in participating, the tricky part is getting permission from senior management."

The tool addresses this acknowledged reluctance to share this data by anonymising and amalgamating into a user average for the benefit of comparison. "The value we can derive from the CCEx depends entirely on the willingness of organisations to share their cost data, but more so on their understanding of the benefits that sharing will bring about," observes Alex Thirifays of the Danish National Archive (DNA). "The more costs are shared, the more we can all learn about making smarter investments in digital curation."

Recognising that some organisations are not in a position to share digital curation costs, the CCEx also draws together a wealth of other information designed to help users understand more about digital curation costs.

The 4C Project outputs presented at the conference have been designed to add value to for all members of the digital curation community. In the same spirit, digital content creators, curators and funders alike, across public and private sectors, were able to find relevance in the conference keynotes from leaders in digital curation Fran Berman and David Rosenthal.

Investing in Opportunity conference, Wellcome Trust, London

You will be able to find all of the project outputs and more on the 4C Project website and on the CCEx. The CCEx will live on beyond the end of the project, to be owned, adopted, cultivated and used by the very digital curation community for which it was created.

The 4C Project concluded on 31 January 2015, but with the wealth of resources available for the digital curation community, it is certainly not end of the Collaboration to Clarify the Costs of Curation.

To find out more about the 4C Project and the roadmap, visit the website now:
www.4cproject.eu

To compare your costs with the CCEx, and gain insight into your digital curation investments go to:
www.curationexchange.org

Sarah Middleton
Head of Communications and Advocacy, Digital Preservation Coalition

Should records managers and archivists adopt the PDF/A-3 standard?

The difficulties of managing electronic records are well-known, and well-documented. Yet these difficulties pale into insignificance when compared to the uncertainties of preserving them – or more accurately, of preserving access to them – over very long periods of time. The short lifecycles of information technology – storage media, hardware, operating systems and application software – combine to present a uniquely tough challenge in some preservation scenarios. Indeed, for this reason, there is widespread pessimism about our ability to preserve access to records from our 'early digital age'.

There has been a great deal of research on this topic – research in which institutions from the UK have taken leading roles. Much of the research is theoretical and of limited application in all but the largest organisations. However, one result is clear and generally applicable: the risk of loss is greatly reduced if electronic records are stored in a carefully-chosen preservation format. By way of illustration, it is challenging today to open an electronic business record produced in 1993 using the little known program 2020 (an early spreadsheet). However, it would be easy to open an equally old document produced with Adobe Acrobat. So 2020 produced records in an obscure format which is difficult to preserve, whereas Acrobat produced records in PDF (Portable Document Format), which is generally regarded as a good preservation format.

However, PDF has several limitations in the context of long-term preservation. For example, it can rely on fonts which are external to the record, and it can contain content that allows the document to change. For this reason, the digital preservation community supported the development of a version of PDF destined specifically for archival use: PDF/A. This archival standard removes the shortcomings of PDF, for example by requiring all fonts to be embedded, and by prohibiting inappropriate content types. PDF/A also offers a way to store metadata – as much or as little metadata as you want – within the PDF/A file, in a standard format. At the same time, records stored in PDF format are readable with any program that can recognise

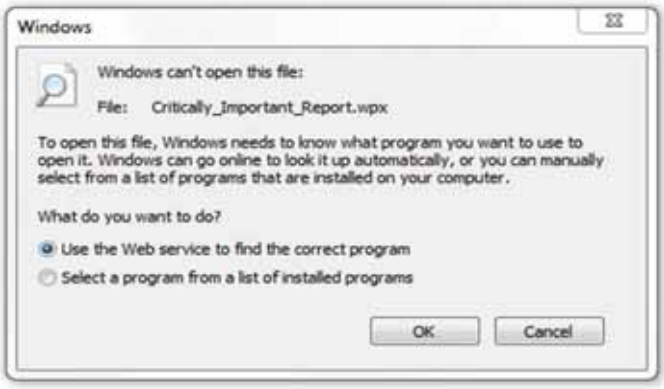
Inforesight Limited logo. Image copyright Inforesight Limited.

PDF files, such as the near-ubiquitous Acrobat Reader. As a result, records managers and archivists can be confident that PDF/A is a good preservation format. Nothing we do today can guarantee that electronic records will remain accessible forever, and indeed relatively few archivists have that requirement. However, PDF/A is undoubtedly one of the least risky formats available. PDF/A was adopted as an international standard, ISO 19005, in 2005.

Nevertheless, there is rather more to it. Converting records from arbitrary formats into PDF/A is easy enough, but is rarely completely accurate. Especially where old electronic records are concerned, we expect a small percentage of failures and inaccuracies, if only because some old records are malformed or corrupted. For this and other reasons, it is good preservation practice to preserve electronic records in both their original format and in a preservation format. So, to pursue the earlier example, we would render a 2020 record to PDF, then keep both the 2020 record and its PDF rendition together. The problem this brings is that it is difficult to manage records and their renditions together, at least in some environments. This is where PDF/A-3 comes in.

PDF/A-3 is a development of PDF/A that allows arbitrary 'attachments' to be stored inside a PDF/A record, much as you can store attachments in an email record. So, using PDF/A-3 as a standard preservation format, a records manager can arrange that all records intended for preservation are rendered to PDF/A-3 format, and that a copy of the original is placed inside the resultant PDF/A3 record, with its metadata. This leaves the archivist one 'object' (the PDF/A-3 rendition) to manage for preservation purposes, while ensuring that the original

The PDF/A-3 standard allows arbitrary electronic records to be packaged together with a PDF rendition in one record



Error message: it is already difficult to open some rare or old file formats. A carefully-chosen preservation format reduces the risk of this happening to your records.

format remains available and inseparably linked to the rendition.

This is an attractive scenario for many preservation requirements. Yet some preservation specialists denigrate it, because of the risk of inappropriate attachments making their way into the archive. The problem is that PDF/A-3 is a permissive standard: it will allow anything – including executable files, audio, or viruses – to be included as attachments. Clearly, innocent users might be misled into storing inappropriate attachments, wrongly believing that they are thereby 'preserved'. Equally clearly, if this happens, the archivist will have an impossible mess to clean up.

So, what is more convincing: the benefits – or the disadvantages – of using PDF/A-3 with attachments to preserve electronic records? My view is that it depends (and not only because I am a consultant). If the idea of PDF/A-3 attachments is simply 'let loose' for records creators to use in an uncontrolled way, undoubtedly there will be problems. However, if its use is carefully controlled and automated, it presents a valuable preservation tool. What do archivists think?

Marc Fresko
Director, Inforesight Limited

PRACTICAL DIGITAL PRESERVATION 2015

Practical Digital Preservation 2015 is a series of workshops and webinars on how to manage, preserve and give access to digital records.
Each full-day workshop and one-hour webinar is offered FREE OF CHARGE to ARA members.

The workshops:

The 5 Step Digital Preservation Journey
25 March 2015 in London

Practical OAIS Digital Preservation
22 April 2015 in Edinburgh

Practical OAIS Digital Preservation
20 May 2015 in Bristol

The 5 Step Digital Preservation Journey
17 June 2015 in Birmingham

The webinars:

Aligning Records Management with Digital Preservation
18 March 2015

Synchronising Axiell CALM with Digital Preservation
15 April 2015

New Ways of Ensuring Access to your Digital Archive
13 May 2015

Digital Preservation in the real world: case studies
10 June 2015
(All at 11am for one hour)

**Check out all Practical Digital Preservation 2015 workshops and webinars and book your place at http://www.archives.org.uk/events
Or call the ARA Office on 01823 327077**

'Having the knowledge and hands-on experience of how to properly manage and preserve digital content is a vital skill for ARA members'.
John Chambers, ARA CEO

'We look forward to sharing practical experiences of implementing and managing digital preservation governance and systems'
John Tilbury, Preservica Chief Executive

ARA Archives & Records Association UK & Ireland
Preservica Digital Preservation

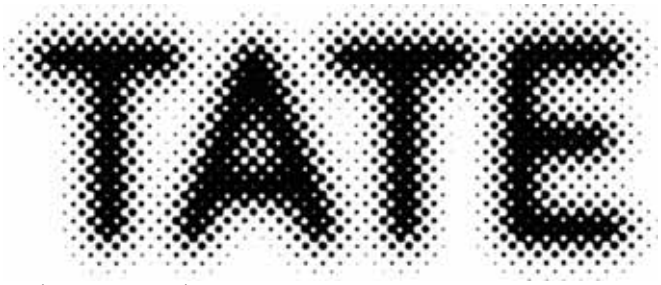
The PERICLES project and Tate Archive

Tate Archive is participating in the PERICLES project – Promoting and Enhancing Reuse of Information throughout the Content Lifecycle taking account of Evolving Semantics. This four-year project on digital preservation is funded by the European Union under the Seventh Framework Programme. At Tate Archive, we collect material relating to the British art world from 1900, and our collection encompasses a range of papers including artists, writers and curators, as well as business records from galleries, funding bodies and other arts organisations. Overall, there are 11 partners in the project – drawn from across Europe – including research and technology partners, and two partners providing use cases. The use cases provide a way of voicing the needs of different user communities, as well as a space in which to test and develop the outcomes of the project.

Tate's involvement in the project includes providing use cases covering a number of different areas, ranging from digital video and software-based artworks and media production, to the born-digital archival material that is Tate Archive's contribution. The other partner supplying a use case is very different: the European Space Agency (ESA), which will be supplying space science data. Between Tate and the ESA, PERICLES will have examples of greatly differing types of data and user communities.

The focus of PERICLES is on issues surrounding ensuring that digital content remains accessible and understandable over time. The project recognises that digital material is subject to constant change during its lifecycle, and that this needs to be reflected in methods used to manage it. Not only are digital objects themselves subject to change, but the environments in which they are created and used are also continually changing. The definition of environment here is a broad one, encompassing technological aspects as well as such areas as policy, user communities, and society more generally.

The project aims to address these challenges by adopting a 'preservation by design' approach. Several different research threads within the project are working on recording and organising information on digital objects, and their environments that will allow change to be monitored and responded to as required. One result from the project will be models describing the environment in which digital objects exist and are used, including metadata on the objects themselves, as well as dependencies on other



Tate logo. Image copyright Tate.

PERICLES project logo. Image copyright PERICLES.

objects, processes and policies that affect objects, and user communities that access them. These models will use the outcomes from a related research thread, which is focusing on extracting information from digital objects, including semantic and technical information. An early result from the project is the PERICLES Extraction Tool (PET) for extracting information from a live computer environment.

Within this overall approach, Tate Archive is exploring the ways in which some of these issues are manifested in an archival context. One area that we are focussing on is describing digital material. We are looking at the information that users require to be able to locate and understand digital objects, including how we can benefit from automatically-extracted metadata. In a related area, we are considering the issue of semantic change and its affects on archival description. Specifically, we are investigating how shifts in understanding of terminology within a designated user community may affect the ability of those users fully to understand archival description. Overall, the project provides a valuable opportunity to work through a range of issues and to learn from developments in other sectors.

For further details on PERICLES, please see the project's website:
http://pericles-project.eu

This work was partially supported by the European Commission Seventh Framework Programme under Grant Agreement Number FP7-601138 PERICLES.

John Langdon
Archive Curator, Tate

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Sir John Sulston with his archive in 2014. No. C0102952. Image copyright Wellcome Trust.

The John Sulston archive: cataloguing a hybrid collection

In 2014, I catalogued the papers of Sir John Sulston, the Nobel Prize-winning biologist and first Director of the Wellcome Trust Sanger Institute, who led British participation in the Human Genome Project during the 1990s. This was the first hybrid collection to be catalogued in its entirety (digital alongside paper) at the Wellcome Library, so it presented a number of challenges.

The catalogued collection comprises nearly 140 archive boxes, some over-size material, and over 1,200 digital files. The majority of these files came on a set of 27 3.5" floppy disks, and the rest were on various media distributed amongst the paper records.

My first challenge was to undertake appraisal, which for the digital material was a two stage process:

- Deciding which disks to retain
- Deciding which files on the disks to keep

The set of floppy disks contained files that were created by Sulston during the course of his work, and the decision to keep these disks was quickly made. However, the disks that were in amongst various folders came from a range of sources. Only eight out of 31 disks contained files created by Sulston. The rest included corporate gifts, material sent to Sulston, and software disks.

In deciding whether or not to preserve these disks, I devised three categories and assigned one to each disk. These were:

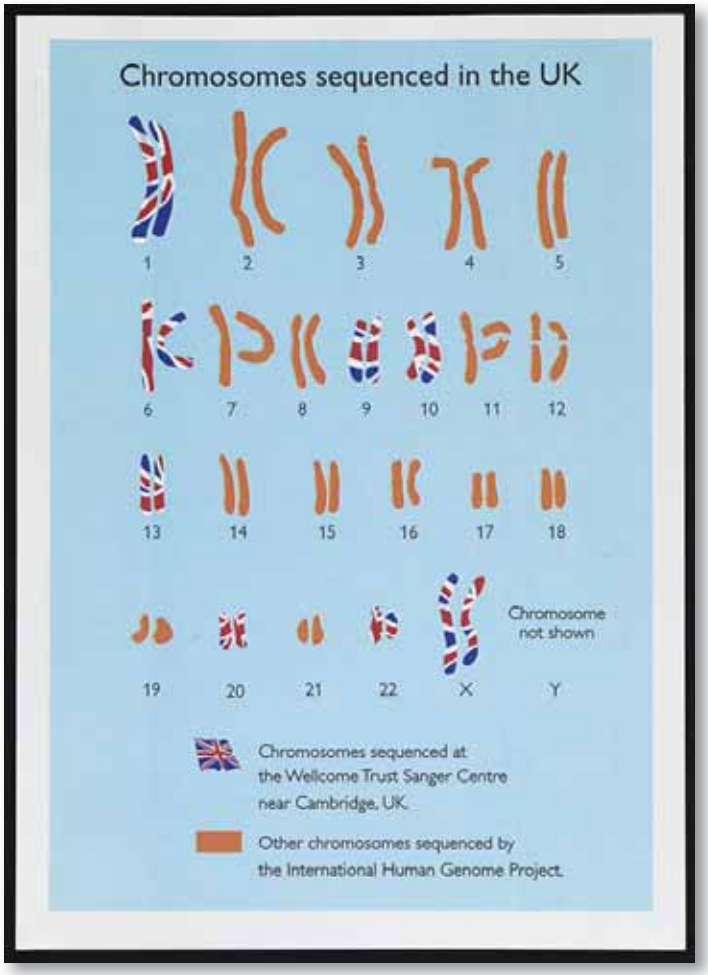
- Keep and ingest
- Remove from the archive
- Keep with the paper records as an artefact

This latter category was for media where the contents were of no interest, but the fact they were given to Sulston was. This included disks sent to Sulston by members of the public after he won his Nobel Prize in 2002. In the end, 12 disks were ingested, 14 were removed, and five are with the paper records as artefacts. The contents are not being preserved and are inaccessible to users.

The second stage of appraisal was to assess the contents of each disk. The quantity of digital files meant it was not feasible to individually appraise every digital file in the collection, so I devised various approaches to help me. First, I used The National Archives' (TNA) software tool DROID to spot duplicates and quickly run through the file and folder names to identify material likely to fail appraisal, such as trash folders.

For the remaining records, I used folder and filenames (where they were meaningful) to aid appraisal. Where a folder name indicated an appropriate appraisal or sensitivity review decision, I then spot-checked folders, viewing a few files to ensure the folder name was accurate before moving on to the next. This allowed me to dedicate more time to the files with obscure names that required closer inspection.

Catalogue arrangement was another area that required careful thought. The catalogue had to integrate the paper and digital records, but the two were organised and stored by Sulston in different ways. He organised his paper records thematically, but his digital records chronologically. Thus as I arranged the material, there would be records that did not fit their location.



Wellcome Trust poster produced for the announcement of the finished draft human genome sequence in June 2000. Archive reference: PP/SUL/B/2/5/7. Image copyright Wellcome Library.

In the end, I took a lead from Sulston himself and used two approaches in my arrangement. The disks that were originally distributed amongst the paper records remained with them in the catalogue. Thus, a file containing papers regarding one of Sulston's lectures also includes a film of the lecture. In contrast, the set of floppy disks created by Sulston were originally stored separately, away from his paper files. Therefore these disks form their own series in the catalogue within the Sanger Institute sub-fonds, since the majority of files relate to Sulston's work as Director of the Institute. I have then used the catalogue description field to note where digital files relate to other areas of the catalogue.

In the end, cataloguing a hybrid collection was not exactly a straightforward process, but with a bit of careful thought, the challenges were dealt with successfully. I am now looking forward to making a start on my next hybrid collection.

Victoria Sloyan
Assistant Archivist – Collecting Genomics,
Wellcome Library

North West Region Digital Preservation Group – update and invitation

Update

Between 2009 and 2012, a group of local authority archivists based in the North West met regularly to share the experience and workload of developing advisory documentation and guidelines to deal with digital records. What became their 'workbook' set out to suggest an achievable approach to preserving and making digital records available.

Early in 2015, interested parties who had attended an ARA Core Training: Digital Preservation event in Liverpool met to discuss the state of play – how the workbook and documentation had held up, and whether the next steps could be better dealt with as a group than as individual respositories.

There was a broad agreement and willingness to test the workbook, re-examine policy and documentation, and move forward in the search for regional solutions to issues of access and storage. It was also useful to now have representatives from university special collections to broaden everybody's experience.

Invitation

If you are interested in joining this informal meeting the group will meet again in early June. The original blog and workbook are available, accessible and useful. If you get the chance, the group would welcome your comments, suggestions and experiences. The group have committed to update the blog with real-life stories of everyday digital preservation in the coming months.

Lisa Greenhalgh
Senior Archivist, Cheshire Archives & Local Studies

David Govier
Heritage Collections Manager, Archives+

Email: archiveslocalstudies@manchester.gov.uk
Blog: https://nwrdpg.wordpress.com

Is a new archive or an extension an unrealistic dream? Consider a 'pod'

Obvious to say, but capital money is harder than ever to get allocated to new buildings, and the path to lottery grants can be long and time-consuming. Many archivists can only dream about a brand new home for their collections, and in some authorities there simply isn't the cash or resource to develop such a home.

There is another option – Anglesey and Shropshire Archives are two organisations who have solved the issue of finding PD5454 compliant storage without resorting to total new builds.

The answer may be – a pod.

A pod is simply a PD5454 compliant structure that is placed within an existing facility, such as a warehouse, or an industrial building.

It is built from conventional materials and is fitted with the appropriate lining, ceiling and air handling equipment in the same way as a new archive would be – but without actually constructing a whole new building.

This can bring a new lease of life, help regenerate areas, and also provide easily accessible, relatively low-cost new homes for precious archive material.

The storage system fitted within the pod is also designed and installed to comply with PD5454, and the whole structure can be provided in a far shorter time than a new home, and at lower costs than providing a totally new storage facility.

Granted, this may not provide a shiny new showcase for archive material. However, in many cases this is a fast, comparatively low-cost way of providing further compliant archive storage space. A pod is certainly a suitable alternative to off-site storage that is still within your own control.

Pods – perhaps a viable option worthy of consideration.

Rob Dakin
National Projects Manager, Link 51 Storage Products

A pod built within an industrial building for Shropshire Archives

Inside the pod

Anglesey Archives. All services are housed outside the pod, leaving the space for effective storage.

Anglesey Archives.

www.archives.org.uk

Don't Risk It! Know Your Records

Laura Hynds, from the Don't Risk It! Know Your Records Working Group, updates on how the ARA's first records management campaign is shaping up.

The ARA's first records management campaign Don't Risk It! Know Your Records is well under way and the working group have been busy since early 2014, producing resources, raising awareness and contacting senior decision makers within a wide variety of organisations.

This campaign will only really deliver if as many records managers as possible join in and advocate in their own organisations.

Within the profession, we are very aware of the benefits of records management – it saves organisations money, helps mitigate risk by ensuring organisations can demonstrate they are compliant with legislation, and promotes a culture of accountability. However, we also probably know that senior decision makers (and our non-recordkeeping colleagues) may not be aware of why they should care about records management. Don't Risk It! Know Your Records is all about informing those decision makers and our wider organisations why they should care about records management, and why not thinking about it could put their organisations at risk.

The campaign was launched with a well-attended event at London Metropolitan Archives back in July 2014, where speakers from The National Archives, the Bank of England and members of the working group discussed advocacy, campaigns and the valued skills of records managers. One of the aims of the day was to help records managers and all those with records-keeping responsibilities, including archivists, advocate within their own organisations. A key part was the launch of the campaign toolkit, which along with other resources is available on our frequently updated area of the website.

The toolkit contains some ideas of how you can use the campaign in your organisations – whether that is through communications, having a physical stall promoting records management, or producing new guidance to raise awareness amongst staff of their responsibilities in line with records management. Finding images to demonstrate records management is tricky and the graphic designer for the campaign has done a great job producing some downloadable images that you can use within your communications. These are available on the internet along with the campaign logo.

Laura Hynds speaks at the launch of Don't Risk It! Know Your Records in July 2014.

In October, we sent out letters, including a leaflet designed by the working group and graphic designer, to close to 1,500 chief executives of organisations across the UK and Ireland covering the local government, private, education and health sectors. The leaflet includes a quick and fun health check for managers to take analysing records management in their organisation, and the next steps they should take and what level of risk they are at.

As I write this, the biggest Don't Risk It! Know Your Records event to date is on the horizon. We have invited leaders from the public and private sectors to join us for a morning at KPMG in London. They will be joined by senior record-keeping leaders and records managers, and will hear presentations on the value of good records management and the perils of getting it wrong. We're particularly pleased that the UK's Deputy Information Commissioner is one of our speakers.

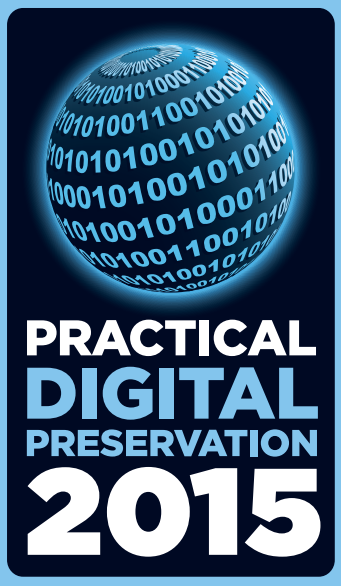
You can read about how the day went in *ARC* next month.

You can follow what's going on in the campaign via Twitter and the normal ARA communications. You can also email us at: knowyourrecords@archives.org.uk.

Tell us about what you are doing in your organisations, what has worked well, what hasn't and ask us for advice on what you can do. We care about records management and our decision makers should do as well. We have a better chance of reaching them if you join us!

Everything you need to know about the campaign is at: www.archives.org.uk/ara-in-action/campaigns/know-your-records.html

Laura Hynds
Don't Risk It! Know Your Records Working Group



How safe are your long-term temporary and permanent business records?

Martin Springell, Product Director at Preservica, explores the challenge of safeguarding vital, long-term and permanent business records to ensure they are still readable and useable when needed.

Nearly every organisation faces the challenge of having to properly manage and safeguard their vital electronic records across the full information lifecycle – in particular for legal, intellectual property, regulatory or compliance needs. This pressure is invariably leading to longer retention times, which in turn is increasing the risk that these important long-term temporary and permanent records can be lost due to bit corruption, media degradation, technology obsolescence, and IT refresh cycles. Even worse, they are not actually readable or useable when required due to file format or software application obsolescence.

Many organisations have therefore begun looking at ways to integrate a robust digital preservation strategy into their overall information governance lifecycle, in particular ways to integrate their Enterprise Content / Records Management (ECM / RM) systems – such as Microsoft SharePoint – with standards-based digital preservation platforms. This properly preserves and safeguards vital electronic records across their life-cycle.

There are a few emerging approaches to this. One model is to export out of the ECM / RM system the business records that are likely to be at risk (i.e. older than ten years), and safely store them in a digital preservation system at the end of their operational use – using a simple automated bulk export and ingest. This can be either manually initiated by the archivist or records manager, or set by the content contributor to automatically export after a given time period, e.g. five or ten years after the point of record creation.

However, there is a second, more sophisticated approach emerging, where digital preservation becomes a fully-synchronised part of the overall record management lifecycle. In this scenario, the ECM / RM system maintains full visibility, policy and control over the record, managing – for example – retention, disposal and legal hold. The digital preservation system simply becomes another repository where the record can be safely stored during its life-cycle, albeit one that also provides protection against bit loss, file corruption, technology obsolescence, IT refresh cycles, and file format and software application obsolescence. This ensures that upon request from the ECM / RM system, the digital preservation platform is always able to provide a validated, readable and useable copy of the electronic record to – for example – meet legal or regulatory requirements.

As we go through 2015, the challenge of how to properly manage and safeguard long-term, temporary and permanent electronic records across the full information lifecycle will become an increasingly important theme and issue for archivist, records, information governance and compliance managers. Be sure you are taking the right steps to protect your vital business records.

To learn more, join the Practical Digital Preservation 2015 webinar:
'Aligning Records Management and Digital Preservation'
Wednesday 18 March, 11am-12pm

www.archives.org.uk/events/viewevent/344-practical-digital-preservation-2015-aligning-records-management-and-digital-preservation-webinar.html

Martin Springell
Product Director, Preservica

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Take a look at the PEL website and you may be surprised at just what we have to offer. Our online resource contains details of a comprehensive and diverse range of specialist products, used by professional archivists, curators and conservators in many different fields, all over the world.

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