Archway User Needs Report

Written by CNSA Archway Committee

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Executive Summary

This report details results from the recent Archway User Needs Survey, and provides a suggested plan of action. Included in the report is a brief history of the Archway database and accompanying timeline to provide context around its development and use to date.

The survey was offered to CNSA members from November 2010 to February 2011. The committee implemented the survey in response to a recognized need for improvement to Archway as a service to members. The survey provides feedback from members on their experience using ArchWay in order to make evidence-based decisions regarding future development of the database. As well, any future consideration of upgrades or changes to the provincial catalogue's software would be well served by a current data set for reference. The committee identified three primary goals of the survey:

- **Functionalit**y: Assess what members want from Archway from a public access point as well as internal collections management tool
- **Barriers**: Assess member barriers to using Archway both internally, and for external visitors to the site.
- **Future Growth**: Assess how Archway can align with member goals and priorities for the future.

After analyzing the data, the committee noticed clear corresponding messages from members that addressed the points above:

- Archway is viewed as a public access point for viewing the holdings of CNSA member institutions. This includes internal staff, as well as visiting public.
- Archway is not a priority for the majority of institutions because of the time required to input descriptions, lack of trained staff/volunteers and the inability to import and export data.
- Despite identified barriers to using Archway, a majority of CNSA respondents indicated that they would like to have an online presence and wish to increase their presence/records in Archway.

History and Timeline of Archway

Members have been using ArchWay since 2000, when it was launched using GenCat, a DOS-based software product from Eloquent. In 2005 it was upgraded by Eloquent to be a web-based product (WebArchives), allowing CNSA members to enter their descriptions remotely via the Internet.

Archway currently lives on government computer servers hosted by Nova Scotia Archives and runs using WebArchives beta version software from Eloquent Systems. The system was purchased by Nova Scotia Archives (then known as Nova Scotia Archives and Records Management) in 2004-05 for $10,000.00. The annual software license renewal is also paid by Nova Scotia Archives. The software continues to be shared by the CNSA and Nova Scotia Archives, and is the database behind 'BosaNova'. Changes to ArchWay affect Bosa Nova.

The following section provides a timeline for the development and implementation of Archway over the past two decades:

- In the early 1990s, plans for an on-line database of archival finding aids from archives across Nova Scotia began to be formed. The founding of the database was driven by a national goal to have all archival resources available on a central on-line database (the Canadian Archival Information network or CAIN), lead by the Canadian Council of Archives (CCA). Now known as ArchivesCanada.ca

- Work begins on the database and by 1998 the Archway archivist, Meghan Hallett is hired. The prototype database is launched in 1999 with a formal launch in 2000. This is also the year the first descriptive records are imported into the CAIN database.

- In 2001 the itinerant description archivist, Deidre Brydon is hired and travels to various archives in Nova Scotia to collect fonds-level descriptions. These descriptions from member institutions were brought back to the CNSA Office for input into ArchWay. CAIN is also officially launched in this year and contains over 600 descriptions from over 30 Nova Scotian archives.

- In 2002 the new CNSA web site is launched. As well, the new Archway photographic database is launched, featuring a selection of images from members' holdings. The new ArchWay virtual exhibit "Holidays & Celebrations" is launched. This is a static database at the moment. No new photographic records are being uploaded by members.

- In 2003 plans for upgrading the ArchWay Descriptive Database are put in place and development work begins. In 2004 a new project archivist, Anjilee Bhatt-Standley is hired to take on the task of developing help documentation for the new software. It's during 2004 that CAIN becomes ArchivesCanada. In 2005 new software (Webarchives by Eloquent Systems) is launched at the Spring Conference. The new software allows

members to enter their descriptions remotely via the Internet.

- In 2007 the CNSA commissioned a Membership Needs Assessment and Planning Study which included ArchWay as a component of its analysis. In this report, it was indicated that contributing to ArchWay was not a priority for members although there was awareness of the database and its value.

- The recent 2010 User Needs Survey polled members about their use and opinion of Archway to determine how the service can be improved. The survey results were presented at the 2011 Annual CNSA Conference in Halifax.

Survey Details

The survey was offered to members via a web link emailed to members via the listserv CNSA-L. The CNSA Archives Advisor provided reminders to members about the survey to encourage completion. After initially trying a variety of online survey providers, the committee chose to use Fluid Surveys: http://fluidsurveys.com/. Recommended by Paul Maxner of NSA, this survey provider is a Canadian-based company, free for basic service and easy to use.

We created 8 questions and had a total of 24 respondents. However, not every question was answered by all 24 respondents. Respondents also provided text responses in the "Other/Comments" option. We did not provide a means of determining if the respondents were institutional members or general members of CNSA. In retrospect, this would have helped with analysis of the data.

Detailed Results

The results provided are accompanied by coloured charts generated by FluidSurveys and a basic summary analysis. You will find the full text comments for each question attached in Appendix A.

1. **How is Archway used by your institution? Please choose more than one answer if applicable.**

Response	Chart	Percentage	Count
To assist with internal collections management activities		12%	3
As a way for the public to view our institution's collections online		54%	13
As a way for the public to view collections held across the province online		54%	13
As a tool to fulfill the requirements of grant applications		33%	8
For staff members to browse collections held at other institutions		58%	14
To assist staff with acquisition		21%	5

	Chart	Percentage	Count
and appraisal decisions			
As a tool for reference services		46%	11
As an electronic data back-up of our institution's descriptions		12%	3
We do not use Archway		25%	6
		Total Responses	**24**

Question 1 Summary

- The majority of respondents use Archway as a means to view the holdings of other institutions. This includes internal staff, as well as visiting public.

- A secondary use of Archway is the viewing of the institution's own collection by staff, volunteers and the general public.
- 25% of respondents do not use Archway.
- Text response indicates that Archway is a vital tool to support the Cooperative Acquisitions Strategy.
- Same text comments indicate that the Accessions module currently not part of Archway may be a useful option for members.

2. **What does your institution think is the main purpose of Archway?**

Response	Chart	Percentage	Count
To make CNSA members' collection accessible online for public viewing		62%	15
To be an internal collections management tool for CNSA members		8%	2
To be both an internal collections management tool and a publically accessible finding aid		58%	14
Archway is currently not relevant to our institution.		21%	5
		Total Responses	**24**

Question 2 summary

- The majority of respondents see Archway's main purpose as a place to view the collections of other institutions.

- Text response states, "the CNSA online photo database being open to members' additions or being integrated into Archway would be useful".

3. **How are you managing your electronic description records? Choose more than one answer if applicable.**
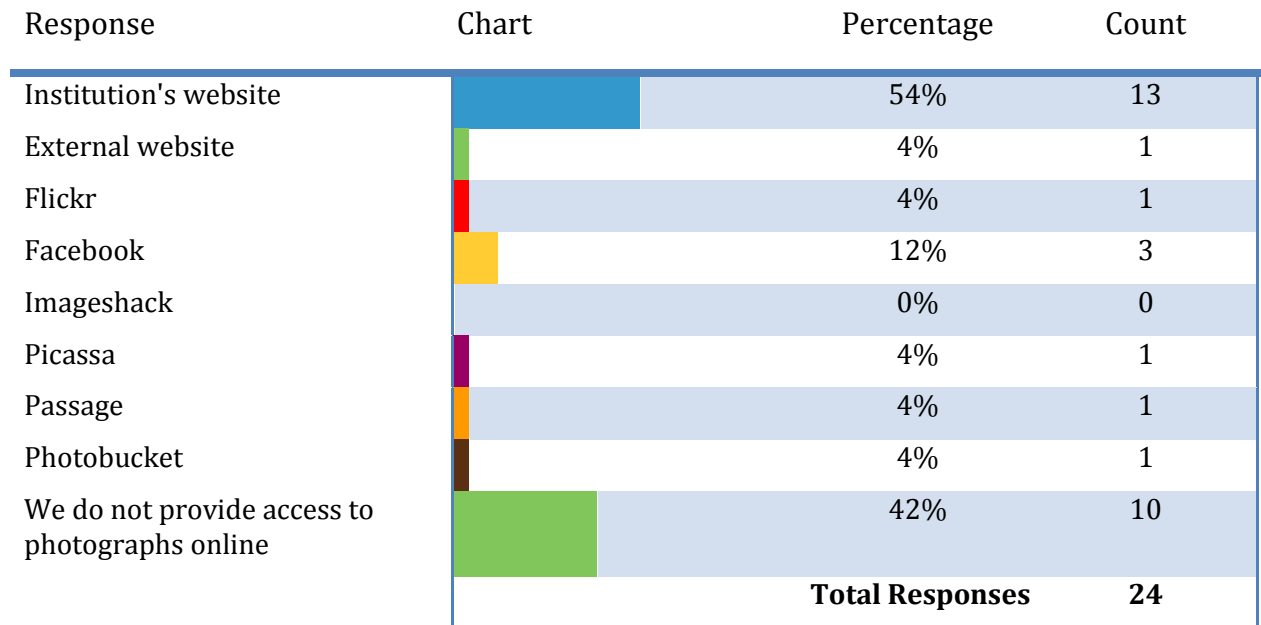
Response	Chart	Percentage	Count
Microsoft Excel		41%	9
Microsoft Access		50%	11
Microsoft Word		50%	11
Archivists' Toolkit		0%	0
Novanet		18%	4
Archon		5%	1
ICA AtoM		5%	1
Library Thing		9%	2
GoogleDocs		0%	0
Filemaker Pro		14%	3
Passage		18%	4
InMagic DB/Textworks		14%	3
Archives Online (add on to InMagic DB/TextWorks)		0%	0
PastPerfect		0%	0
Re: discovery Proficio		0%	0
STAR/Archives		0%	0
Eloquent GenCat/WebArchives		9%	2
	Total Responses		**22**

Question 3 Summary

- Over half of CNSA respondents are using software specifically designed for or tailored to archival records.
- The majority of CNSA respondents are using a variety of software to achieve their archival goals.

- Most are using a mixture of programs – almost all Microsoft Suite.
- 4 members using Passage.
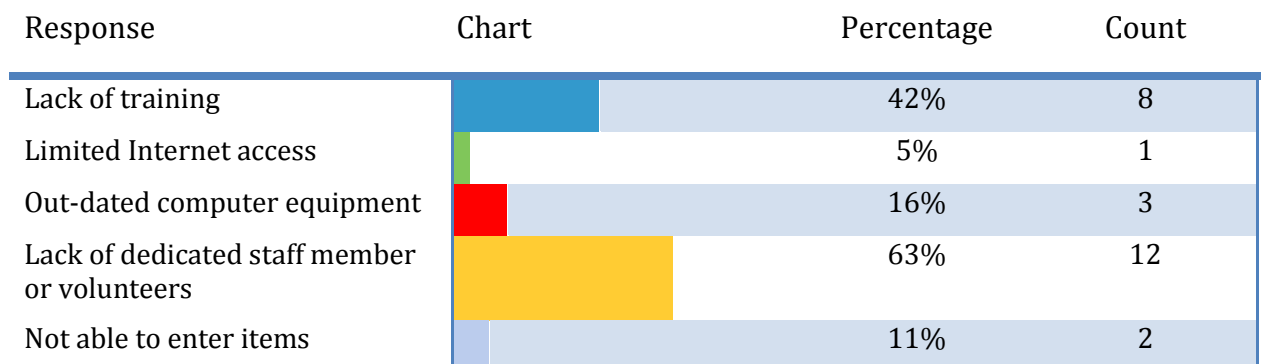- 2 respondents currently use Archway's parent company Eloquent.

4. How does your institution provide access to photographs online? Choose more than one answer if applicable.

Response	Chart	Percentage	Count
Institution's website		54%	13
External website		4%	1
Flickr		4%	1
Facebook		12%	3
Imageshack		0%	0
Picassa		4%	1
Passage		4%	1
Photobucket		4%	1
We do not provide access to photographs online		42%	10
		Total Responses	**24**

Question 4 Summary

- Almost half of the respondents are not providing any access to images.
- Not a widespread use of Web 2.0/Social Networking options such as Flickr, Facebook, YouTube.
- The text responses indicated that respondents are using ContentDM, Artifacts Canada, and Memorial University's DAI.

5. What are your institution's main barriers to entering records in Archway? Choose more than one answer if applicable.

Response	Chart	Percentage	Count
Lack of training		42%	8
Limited Internet access		5%	1
Out-dated computer equipment		16%	3
Lack of dedicated staff member or volunteers		63%	12
Not able to enter items		11%	2

	Chart	Percentage	Count
No fonds description ready		32%	6
Other archival functions take precedence		53%	10
Do not use Archway		21%	4
		Total Responses	**19**

Question 5 Summary

- The majority of CNSA members consider lack of trained staff with time to input records as the main barrier for not entering records in Archway. In other words, Archway is not a priority to most institutions.
- Respondents indicated in the text comments that they do not find Archway "intuitive", too "time consuming", and that it is "difficult to correct mistakes."
- Difficult data entry screens require ongoing refreshment of training, making the work unsuitable and frustrating for volunteers assigned the task.
- One respondent noted that when the "system is down" there is a barrier to using Archway.

6. Archway has some technical limitations. Please indicate if any of these impacts your use of Archway. Choose more than one answer if applicable.

Response	Chart	Percentage	Count
Difficulty importing data such as batch upload of records		46%	6
Difficulty exporting data after entry into Archway		31%	4
Difficulty with individual record data entry procedure		62%	8
Difficulty searching the database or retrieving information		23%	3
Results do not appear in search engines (Google, Yahoo, Bing, etc) making it hard to find Archway online		46%	6
Inability to upload to Library and Archives Canada (LAC) for inclusion in the national catalogue		38%	5
		Total Responses	**13**

Question 6 Summary

- The fact that less than half of CNSA members responded to the questions on the technical limitations of Archway suggests that many members are not familiar enough with Archway to understand the technical limitations.
- Archway needs to be able to upload or import data in bulk format from other delimited formats.
- Archway needs to allow for more intuitive data entry.
- Archway records need to be accessible to internet search engines.
- Archway records must be able to be exported, especially to Archives Canada.

7. If we were able to provide more training on Archway what delivery format would you prefer?

Response	Chart	Percentage	Count
Online tutorial		67%	16
In person workshop		46%	11
Updated help manual		29%	7
Not interested in training for Archway		12%	3
		Total Responses	**24**

Question 7 Summary

- Archway training for users must be offered online and in person, with ongoing training and assistance.

8. Do you have future goals to create or enhance an online presence for your institution?

Response	Chart	Percentage	Count
Plan to use Web 2.0 sites such as Flickr, Facebook and YouTube to promote specific collections		22%	4
Plan to increase number of RAD compliant records in Archway catalogue		56%	10
Plan to develop a website for our institution with basic information such as hours and location		11%	2

Plan to expand current website content to include virtual exhibits		33%	6
No goals for online presence		28%	5
		Total Responses	**18**

Question 8 Summary

- Despite recognition of some obstacles, the majority of CNSA respondents want to have an online presence and wish to increase their presence / records in Archway.

Actions

The following points are some of the priorities for action identified from the survey responses:

1. Improve functionality to increase efficiency of data transfer. Batch import and export is essential as well as changes to the user interface to make it more intuitive and easier to use. A discussion around application for funding in order to implement these changes should be made a priority.
2. Discuss the development of an online training tutorial once functionality issues have been resolved. This online tutorial would support in-person workshops.
3. Address the dormant photograph database on Archway. Begin discussions around the future intent of this photograph database and how it can benefit members.
4. Explore the idea of using the accessions database module to reduce the burden of full description in the current Archway interface.

Conclusion

Despite placing significant monetary and human resources into the maintenance and promotion of Archway, it is not a priority for the majority of CNSA members. The intention of this report is to begin a dialogue to address future actions for the improvement of Archway. The committee would like to see Archway move from an exclusive and specialized archival tool to an inclusive user-friendly application that promotes the diverse archival heritage across Nova Scotia.

Appendix A

Question 1 Comments:

#	Response
1.	It is a vital tool in supporting the Cooperative Acquisition Strategy - for referrals and knowing who already has similar records. I've never thought of the possibility of using Archway for internal management - but if people use it that way we could explore offering the Accession database for everyone to use - now that would really help with co-operative acquisition!!
2.	At present we do not use Archway.

Question 2 Comments:

#	Response
1.	I think this is the main function, but the intended purpose was likely the first bullet above.
2.	Another staff member had the original training about Archway and I was not aware that it could be used internally. I thought all d to be put online. I will be looking at its use more closely for our needs now. However something like the CNSA online photo database being open to member's additions or being integrated to Archway would be useful.

Question 3 Comments: |

#	Response
1.	We are in the process of transferring our RAD descriptions over to ICA-ATOM. We have not implemented it fully yet.
2.	EAD/XML finding aids on our website.
3.	Other word processing program
4.	We use Word to create and edit descriptions, then paste into Filemaker. We use Excel for inventory lists / finding aids.
5.	My SQL
6.	We have a database for our accessions records (which includes full descriptions) that was built by an internal employee. Most of our records, once approved, are then uploaded to our institutions main website, either in the Library catalogue, or as an individual finding aid.
7.	We have an in-house accessions database that links to a catalogue.
8.	EAD/XML finding aids
9.	MINISIS M2A

Question 4 Comments:

#	Response
1.	We have started to use Digital Collections Builder (http://dcb-gcn.canadiana.org/)for managing photographs, and found that it has been effective. Although, our Digital Collections Builder site is not yet public.
2.	ContentDM for larger collections of photographs and digital collections
3.	Artifacts Canada
4.	First point of access to (and control of) digitized images is via our on-line searchable database where we can attach digital content to the descriptive record. We also use on-line mini-exhibits to highlight some content and will soon be able to direct those interested directly into the database to see more or at least descriptions of similar content.
5.	ContentDM will soon be used in this way. A different catalogue currently includes our images.
6.	The photos on our website are very limited in number and are just up as samples of what might be found in the archives.
7.	We have some images online using Memorial University's Digital Archive Initiative and also an external website for a recent music digitization project. We will soon be placing images online using Flickr. As well, we will soon have a new website which may feature some online exhibits created using the new content management system (M2A).

Question 5 Comments:

#	Response
1.	We have used Archway in the past, and will continue to use Archway as time allows, but think Archway is in dire need of a new platform and re-design. We are focusing our time and energy on adding our descriptions, as they become available to our ICA-ATOM instance, as we see that as a more effective platform for dissemination.
2.	The only barrier we have found to using ArchWay is when the system is down itself.
3.	Archway too difficult, not intuitive, difficult to correct mistakes
4.	Time and money. Money to hire someone with time. Steep training curve not suited to volunteers.
5.	Applied for funding, wasn't approved, so couldn't spare volunteer time to enter our fonds in Archway.
6.	We find Archway too time consuming and confusing and so have deemed it not worth the effort. The system is not intuitive and we have successfully found other ways of presenting our records to the public
7.	None.
8.	Lack of time
9.	Find the entering process laborious and frustrating; it is not intuitive.
10.	We do not have funding for this

11.	We are in the process of still gaining control of our backlog!
12.	We choose not to have our records on Archway.
13.	No barriers other when Archway is down and can't be accessed.
14.	Currently spending time entering data into institution's own content management system. If Archway data was exportable into multiple formats we would feel more comfortable spending time entering directly into Archway. We could then use the data in our own system as well. Right now, with limited time, staff and resources we've decided to try and get our paper records entered into M2A.

Question 6 Comments:

#	Response
1.	A lot of Archival material is appearing in WorldCat, alongside Archival material, because of the OAI-PMH protocol that is being used.
2.	Difficulty in deleting records once they have been placed in ArchWay.
3.	With the free archives databases that now exist, CNSA should no longer be paying for a cumbersome commercial database that is difficult for members to use.
4.	I have never actually gone through the process of entering records into Archway, and have never spent much time trying to do many of the things listed. When I got to my current position, it was never presented to me as something I should be doing. I have tried to figure out the system myself to start putting things up as is encouraged by CNSA, but I could not figure it out, the manual didn't help, and my boss also has trouble with the database and doesn't have time to sit down and figure it out and then show me how to use it
5.	Have not used it enough to encounter problems.
6.	Haven't use the data base in a while. Don't remember.
7.	I think the technical limitations are surmountable. We can now easily do a direct upload from our database to Archway and the last 2 times have been easy and seamless (as long as I remember not to include file and item-level records!) I've encouraged others with databases to explore upload possibilities - I'm sure Eloquent will work with institutions if some mapping is needed. I think CNSA would have an interest in developing easy upload mechanisms for the most commonly used products. I understand that WebGencat can export to multiple formats and the issue of uploading to ArchivesCanada is at CCA/LAC's end. It would be good to explore exactly what formats Archway can be exported to and let CCA/LAC know that is what will be needed to migrate our data. Eloquent now has an upgrade that will make the Public User Interface more powerful - this is available as part of the regular annual maintenance and would only take a bit of liaison with Eloquent to have it appear as we want it. We're putting the finishing touches on ours, so it should be live in the New Year, meantime you can look at City of Toronto's db. I'm most excited that searches can be limited to those with digital content and thumbnails of photos are easily viewable and linked to larger images. Researchers will also be able to email us directly with lists of the material they want to view - they can create, manipulate, send lists of their search results. You can also put a link on your website directly into the db record -this could be very useful to our members. Eloquent also has an HTML export module so that our fonds descriptions could be put on our web-site, and thus available to

	search engines - you get the advantages of a relational database within the db, but don't lose out on search engine access. Essentially I don't think we've explored all the options now available through Eloquent. You know me, I'm not a total Eloquent booster, but I also recognize that it is far more powerful than Archway is making use of.
8.	Can't say, not tried update.
9.	None of these impact our current use of Archway but a better system would resolve some of these challenges for the future.
10.	we are not sure what would be our limitations

Question 7 Comments:

#	Response
1.	I think rather than updated instructions, Archway itself needs an update
2.	Not needed for our institution - but I think it should just be incorporated into the workshop on arrangement and description, and make sure the help available within the database via scroll-overs and pop-up windows is relevant and useful to CNSA members.

Question 8 Comments:

#	Response
1.	We plan to use Omeka (www.omeka.org) to launch virtual exhibits.
2.	Already doing most of these.
3.	No plans to expand current web presence
4.	We would use Archway if it was more intuitive and easy to use, easily compatible with our existing website and online presence, and was searchable via Google/Bing/etc
5.	Plan to continue to build our database - especially with digital content, contribute upper-level descriptions to Archway, and do virtual exhibits as time allows. Tough decision is when large-scale digitization project content should go in database vs. directly on our web-site.
6.	We have been "experimenting" with various ways to create an online presence that meets the demands of our researchers. This may impact on our finding aid development too.
7.	We already have an institutional website, but it is not specifically archives. We plan to remedy that when we get around to it!
8.	Although we plan to increase number of RAD compliant records in Archway, we would probably wait until an import option is available for large batches. Smaller record input would be done on a project basis with funding to support the entry.