A (Web)Site for Sore Eyes: Creating a Platform to Store, Share, and Maintain Documentation

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BPE2019

docs.rockarch.org

The central platform for the documentation of the Rockefeller Archive Center

Project Origins

June 2017 - New RAC Hires

Ford Foundation grant creates positions for 3 new archivists at RAC:

- Katie Martin - Processing
- Darren Young - Processing
- Hannah Sistrunk - Digital

Project developed to:

- Advance interdepartmental teamwork
- Learn new technical skills

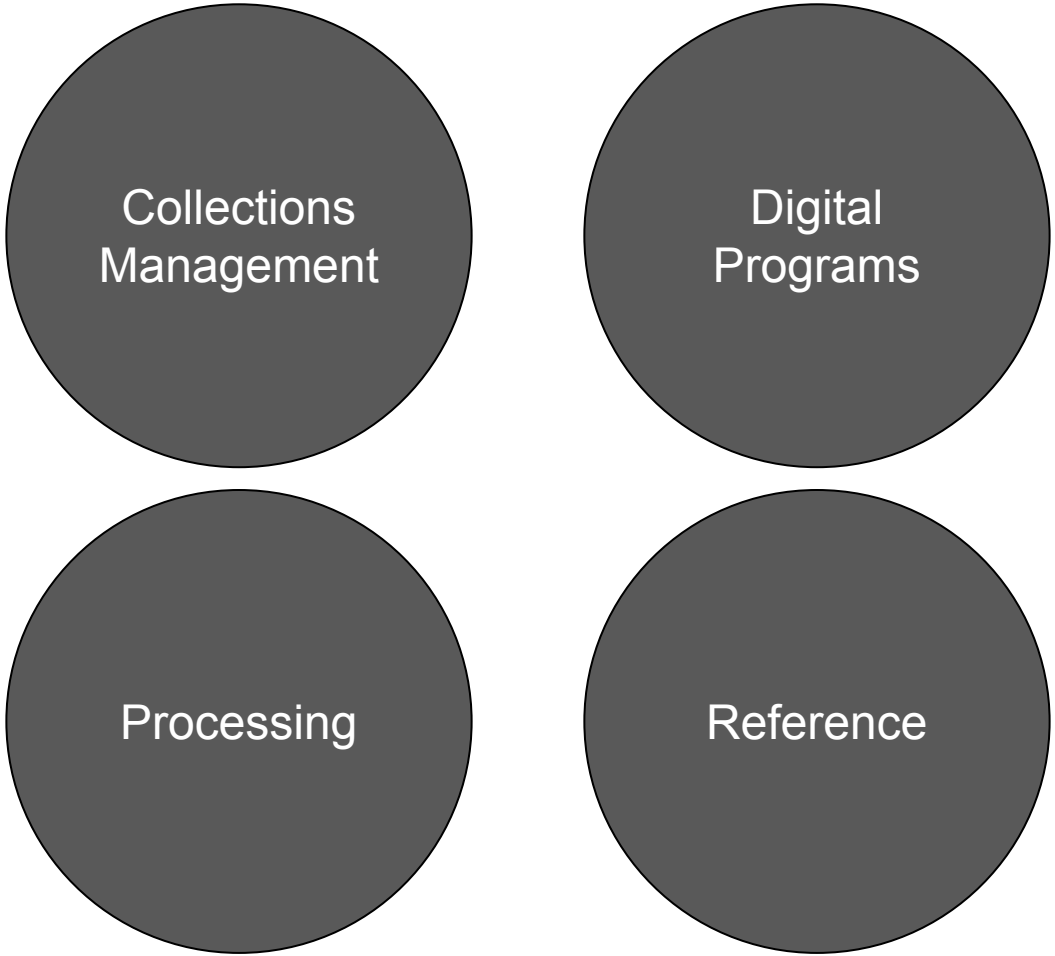
The Rockefeller Archive Center

"The Archives Program of the Rockefeller Archive Center fosters and supports a broad community of users examining the history of philanthropy and its related endeavors."

- Opened in 1974
- Located in Sleepy Hollow, NY
- Independent operating foundation
- Makes available the papers of the Rockefeller Family, the records of the philanthropic institutions they founded, and the records of other philanthropic organizations
- Collections include: Rockefeller Foundation, Rockefeller Brothers Fund, Rockefeller University, Ford Foundation, Russell Sage Foundation, General Education Board, Henry Luce Foundation, Commonwealth Fund, Hewlett Foundation, etc.

“The Archives Program achieves this mission through four interconnected function areas that manage the Center’s archival holdings from acquisition to accessibility”

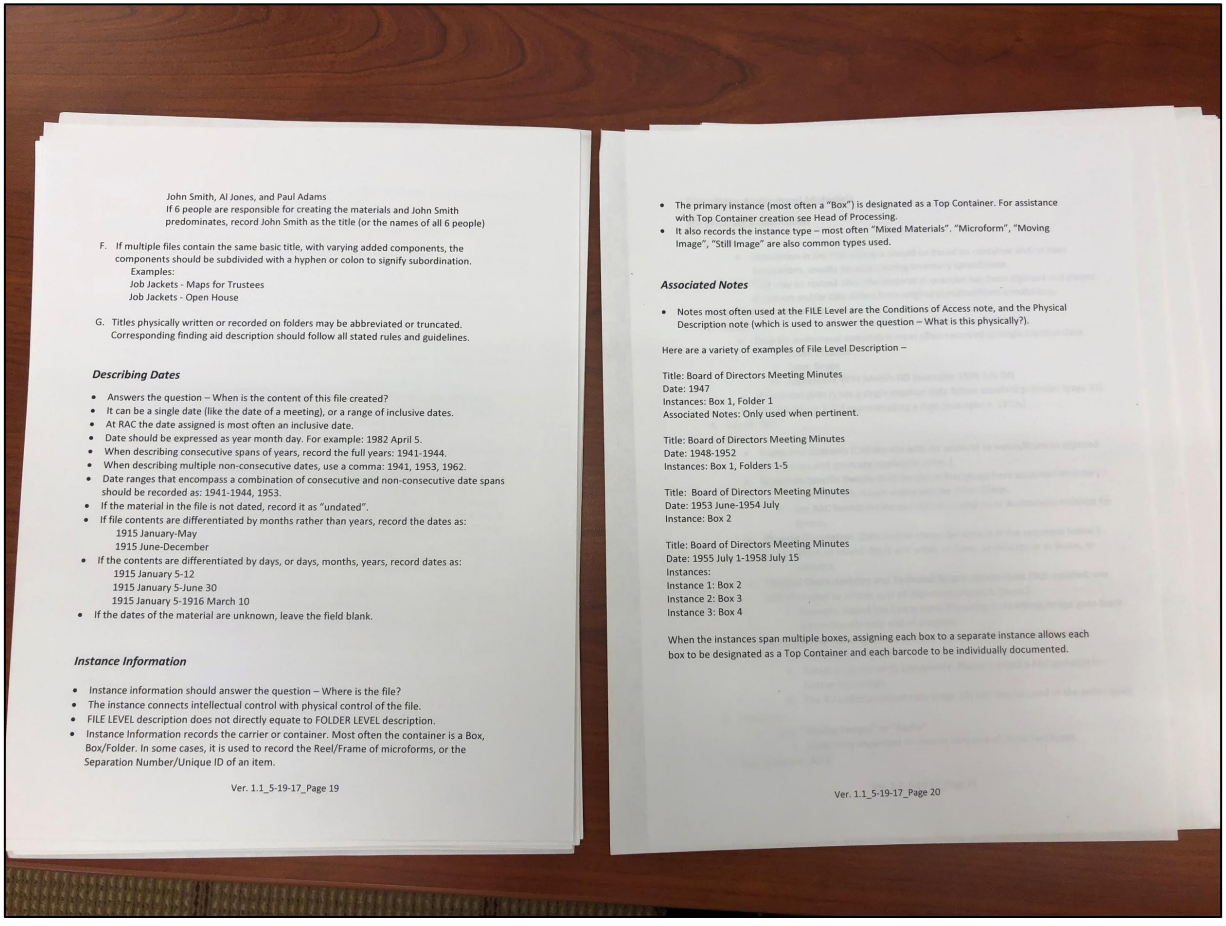
RAC Archives Teams



Digital Programs Team

- Provides technical leadership and expertise to staff in all program areas
- Takes a collaborative, transparent, and standards-based approach, contributing to open-source systems and communities
- Engages researchers, staff, and donors to understand their needs, prioritize solutions, and produce high-quality and useful tools and services

A Processing Archivist's Tool



John Smith, Al Jones, and Paul Adams
If 6 people are responsible for creating the materials and John Smith predominates, record John Smith as the title (or the names of all 6 people)

F. If multiple files contain the same basic title, with varying added components, the components should be subdivided with a hyphen or colon to signify subordination.
Examples:
Job Jackets - Maps for Trustees
Job Jackets - Open House

G. Titles physically written or recorded on folders may be abbreviated or truncated. Corresponding finding aid description should follow all stated rules and guidelines.

Describing Dates

- Answers the question – When is the content of this file created?
- It can be a single date (like the date of a meeting), or a range of inclusive dates.
- At RAC the date assigned is most often an inclusive date.
- Date should be expressed as year month day. For example: 1982 April 5.
- When describing consecutive spans of years, record the full years: 1941-1944.
- When describing multiple non-consecutive dates, use a comma: 1941, 1953, 1962.
- Date ranges that encompass a combination of consecutive and non-consecutive date spans should be recorded as: 1941-1944, 1953.
- If the material in the file is not dated, record it as "undated".
- If file contents are differentiated by months rather than years, record the dates as:
  1915 January-May
  1915 June-December
- If the contents are differentiated by days, or days, months, years, record dates as:
  1915 January 5-12
  1915 January 5-June 30
  1915 January 5-1916 March 10
- If the dates of the material are unknown, leave the field blank.

Instance Information

- Instance information should answer the question – Where is the file?
- The instance connects intellectual control with physical control of the file.
- FILE LEVEL description does not directly equate to FOLDER LEVEL description.
- Instance Information records the carrier or container. Most often the container is a Box, Box/Folder. In some cases, it is used to record the Reel/Frame of microforms, or the Separation Number/Unique ID of an item.

- The primary instance (most often a "Box") is designated as a Top Container. For assistance with Top Container creation see Head of Processing.
- It also records the instance type – most often "Mixed Materials". "Microform", "Moving Image", "Still Image" are also common types used.

Associated Notes

- Notes most often used at the FILE Level are the Conditions of Access note, and the Physical Description note (which is used to answer the question – What is this physically?).

Here are a variety of examples of File Level Description –

Title: Board of Directors Meeting Minutes
Date: 1947
Instances: Box 1, Folder 1
Associated Notes: Only used when pertinent.

Title: Board of Directors Meeting Minutes
Date: 1948-1952
Instances: Box 1, Folders 1-5

Title: Board of Directors Meeting Minutes
Date: 1953 June-1954 July
Instance: Box 2

Title: Board of Directors Meeting Minutes
Date: 1955 July 1-1958 July 15
Instances:
Instance 1: Box 2
Instance 2: Box 3
Instance 3: Box 4

When the instances span multiple boxes, assigning each box to a separate instance allows each box to be designated as a Top Container and each barcode to be individually documented.

Guide to Processing Collections at the RAC

- 37 pages
- Stored in Word Doc
- Located in multiple locations on institution shared drives
- Multiple versions of document stored on institutions shared drives
- Subject to revisions as processing workflows for certain special formats like legacy digital media develop

- Large document for users to discover and access information quickly and efficiently
- Word Doc format inhibits how content can be shared and used on web
- Complicated structure of network drives makes manual difficult to discover
- Multiple versions in multiple locations increases the likelihood that staff will follow outdated instructions
- Word Doc format inhibits how efficiently content revisions can be incorporated, shared, and tracked

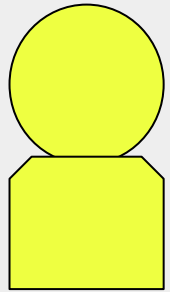
Putting the First Doc on the Web

July 2017 - Project to convert the Processing Manual into a series of webpages

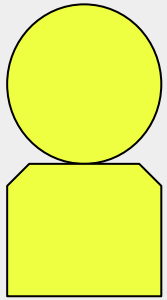
Make the Processing Manual available online by:

- Converting the manual into a format that could be easily shared and managed on the web
- Deciding how the manual should be divided into individual web pages
- Determining how to structure the manual to convey meaning
- Using a static site generator to convert the manual into webpages
- Storing and managing the manual on the web with GitHub

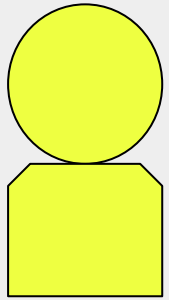
Project Team



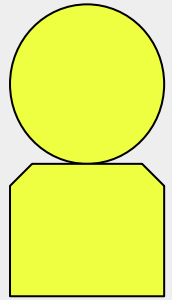
Hillel



Darren



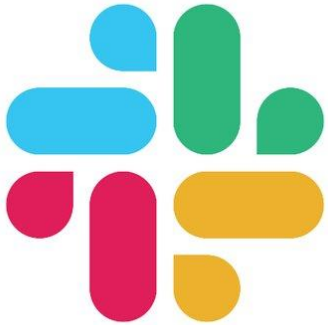
Hannah



Katie

Laying the Groundwork:

Learning, Communication, & Collaboration





Format for Structured Documentation for the Web

Markdown

- Lightweight markup language
- Designed to be easy to read, write, and edit
- Plain text format

Process

- Converted processing manual in Word Doc to Markdown using Pandoc
- Edited Markdown files to clean up errors from conversion
- Analyzed structure and organization of manual document and used Markdown conventions to represent that structure

Converting Markdown files into Webpages

MkDocs

- Static site generator geared towards building project documentation
- Uses documentation source files written in Markdown
- Built in development server

Process

- Added Markdown files as individual pages
- Previewed site as developed it
- Applied built in theme - readthedocs

Hosting and Maintaining Documentation on the Web

GitHub

- Web-based hosting service that enables version control
- Ideal for collaboration

Process

- Created GitHub repository to store Processing Manual Markdown files used on MKDocs site
  - https://github.com/RockefellerArchiveCenter/processing-manual
- Created branches to edit files and then merged changes into master branch

Processing Manual Site Becomes Proof of Concept for Larger Docs Platform

A Site for All of Our Documentation

September 2017 - RAC Docs Site Project begins

Motivations and goals for making all RAC documentation available on the web:

- Centralized location for staff access and discovery
- Version control
- Use of web conventions to enhance documentation
- Sharing our documentation with larger archives community
- The identification and protection of strictly internal documentation

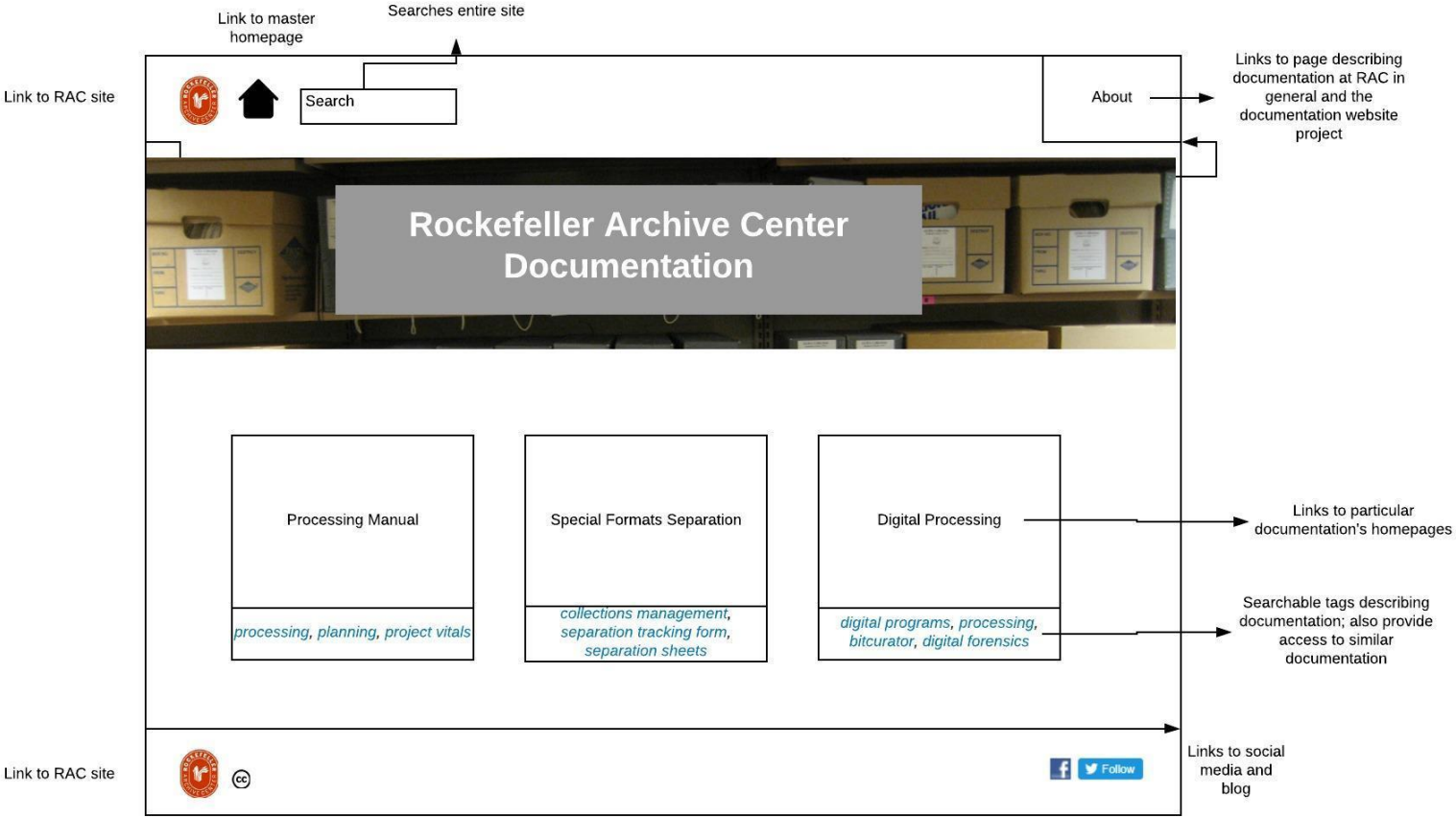
What We Needed to Design:

Central interface to discover and access all documentation - A homepage

Pages for the individual documents

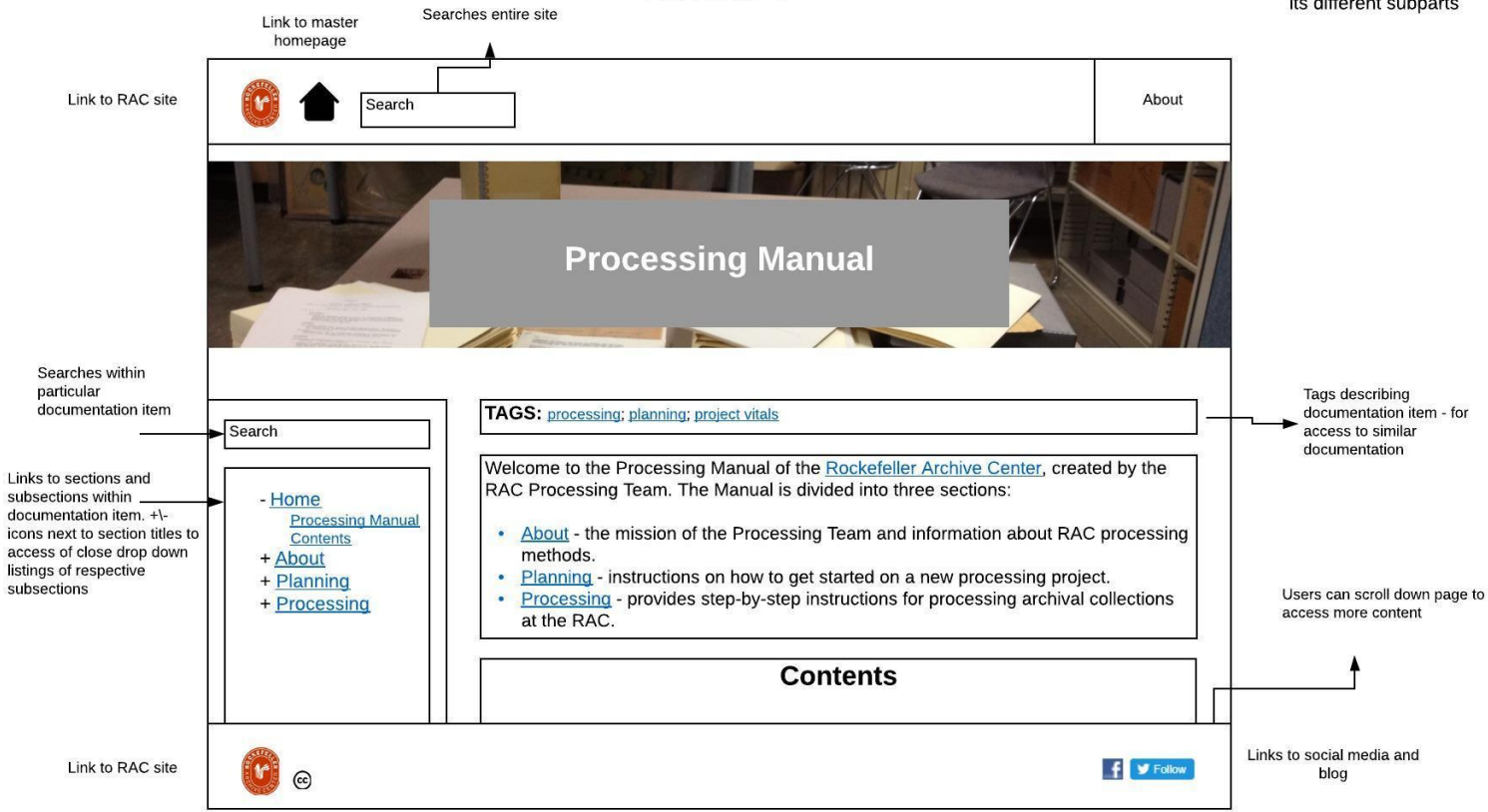
Master Homepage
10/2/2017

The site's homepage provides links to the RAC's various documentation pages



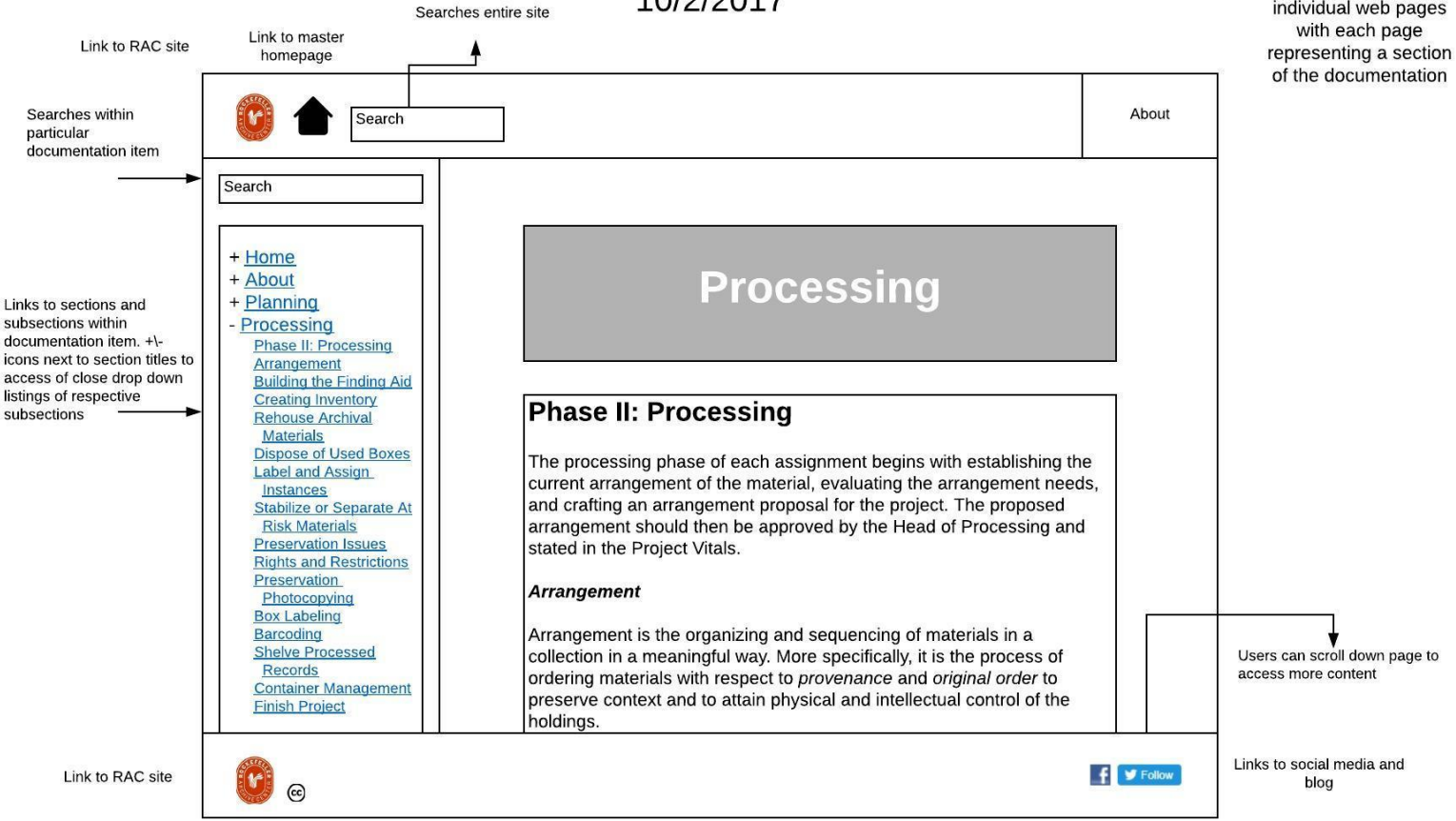
Processing Manual Homepage 10/2/2017

A homepage will provide some information on the content and organization of a documentation item and facilitate access to its different subparts



Processing Manual
Content Page
10/2/2017

The content of a documentation item will be organized into individual web pages with each page representing a section of the documentation



Turning Our Designs into Templates



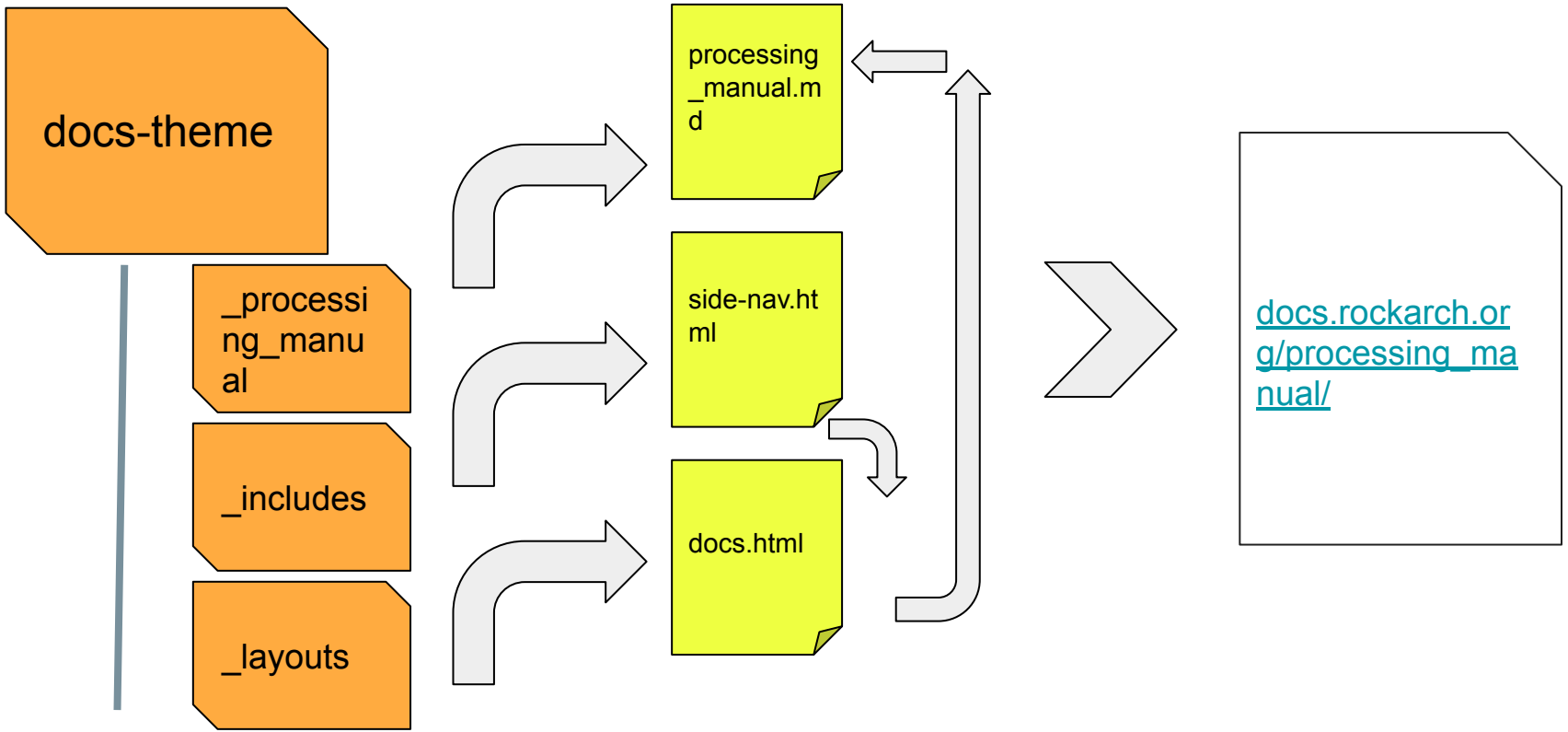
Jekyll

- Static site generator
- Takes Markdown files and uses layout templates to generate a website
- Stores Markdown, HTML, and other types of files in a directory file system
- Easier to maintain than CMS like Wordpress
- RAC uses it to create some of its other web properties

Encountering Our First Technical Barriers

- Liquid syntax (https://shopify.github.io/liquid/)
  - ex) {% for file in site.data %}
- Jekyll documentation largely for blogs (https://jekyllrb.com/docs/)
  - Not our purpose
- Understanding how the pieces fit together
  - How do our Markdown files work with includes and layouts to produce a homepage and individual documentation webpages?

Docs-theme - First Plan for styling *and* building site



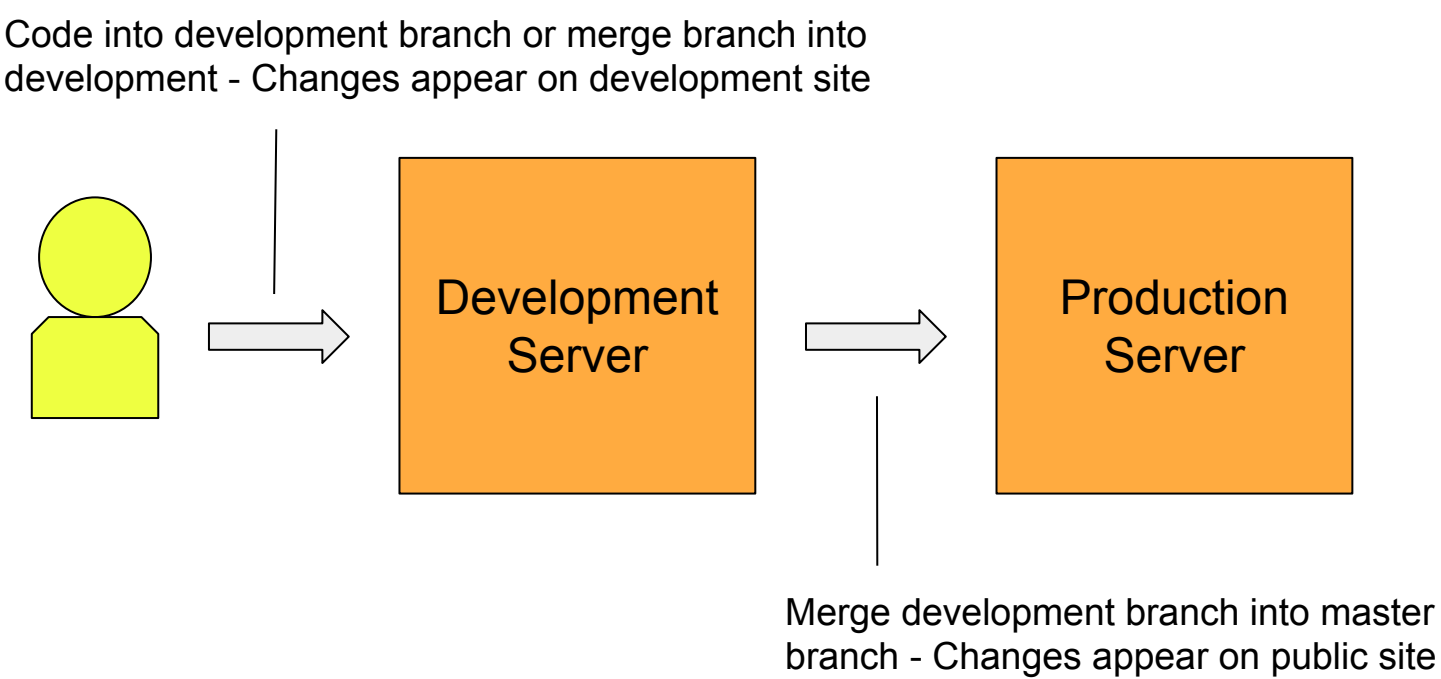
A Docs GitHub Repo

Config File Requirements

12 lines (11 sloc) | 348 Bytes

```yaml
public: true
type: "docs"
category: "arrangement and description"
tags:
  - "workflow"
title: "Guide to Processing Collections"
description: "A manual for arranging and describing archival collections."
pages:
  - ["Rockefeller Archive Center Guide to Processing Collections", "index"]
  - ["Planning", "planning"]
  - ["Processing", "processing"]
```

Coding Workflow



Templates Complete.
Content Supplied.

Now Features and Styling

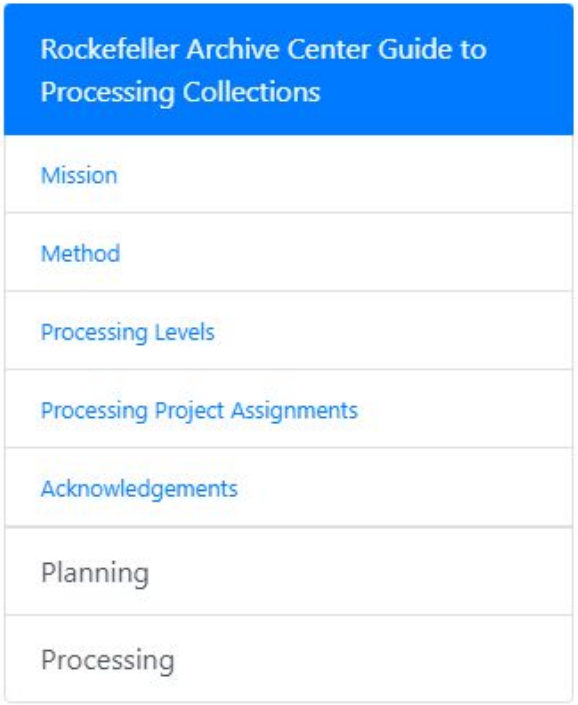
Bootstrap

JavaScript

Documentation Cards



Side Navigation



Docs Site Running

November 2017 - First phase of Documentation Project complete

Discuss Docs Site at Archives Staff Meeting

Site is available as a resource for staff to access documentation

Moving to staff adding content to site

Going Public and Involving Staff

Allocate maintenance responsibilities across the RAC

Improve site layout and features

Write better documentation with a focus on structure

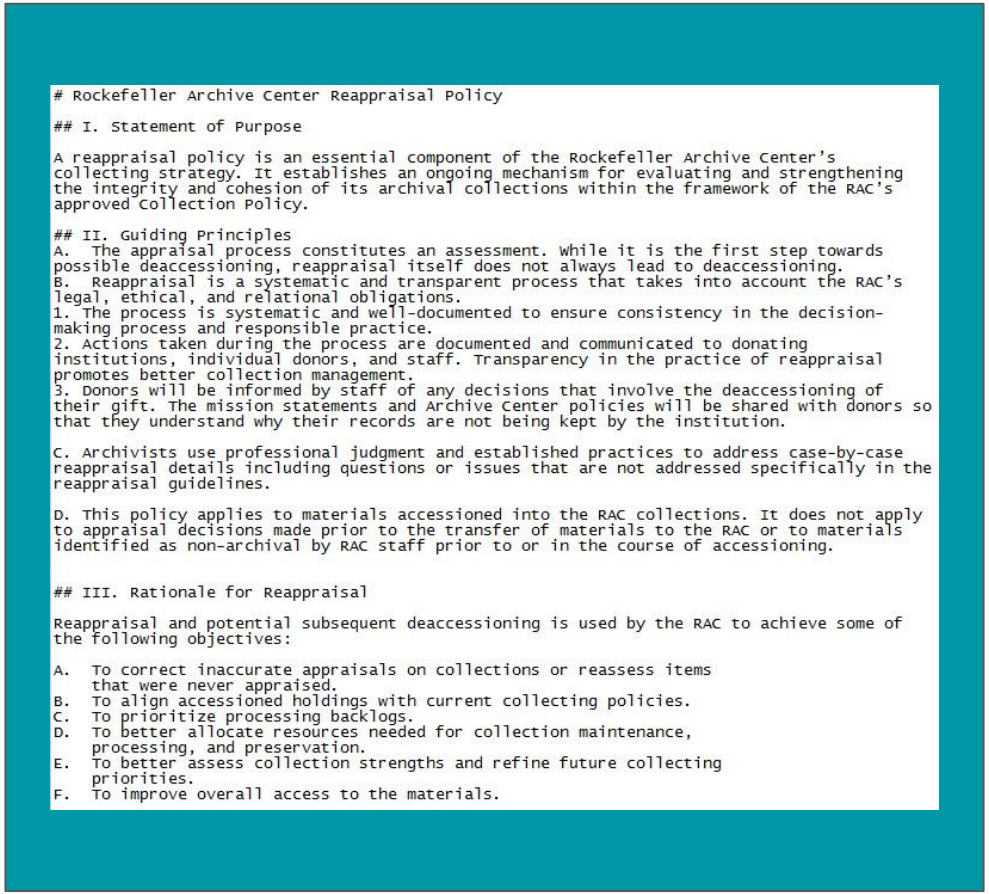
Promote RAC documentation to wider archival community

Project Management Goals

- Documentation Team is responsible for updating and maintaining site structure
- Archivists writing documentation should be ultimately responsible for maintaining that documentation on the site

Markdown Workshops

- Two workshops
  - 10 voluntary participants with no prior experience
- Converted policies and workflows prior to workshop
- Issues involving translating a complicated Word document to a web page
  - Structure vs. Style



```
# Rockefeller Archive Center Reappraisal Policy

## I. Statement of Purpose

A reappraisal policy is an essential component of the Rockefeller Archive Center's
collecting strategy. It establishes an ongoing mechanism for evaluating and strengthening
the integrity and cohesion of its archival collections within the framework of the RAC's
approved Collection Policy.

## II. Guiding Principles
A.  The appraisal process constitutes an assessment. While it is the first step towards
possible deaccessioning, reappraisal itself does not always lead to deaccessioning.
B.  Reappraisal is a systematic and transparent process that takes into account the RAC's
legal, ethical, and relational obligations.
1. The process is systematic and well-documented to ensure consistency in the decision-
making process and responsible practice.
2. Actions taken during the process are documented and communicated to donating
institutions, individual donors, and staff. Transparency in the practice of reappraisal
promotes better collection management.
3. Donors will be informed by staff of any decisions that involve the deaccessioning of
their gift. The mission statements and Archive Center policies will be shared with donors so
that they understand why their records are not being kept by the institution.

C. Archivists use professional judgment and established practices to address case-by-case
reappraisal details including questions or issues that are not addressed specifically in the
reappraisal guidelines.

D. This policy applies to materials accessioned into the RAC collections. It does not apply
to appraisal decisions made prior to the transfer of materials to the RAC or to materials
identified as non-archival by RAC staff prior to or in the course of accessioning.

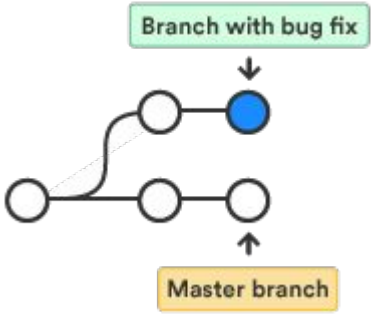

## III. Rationale for Reappraisal

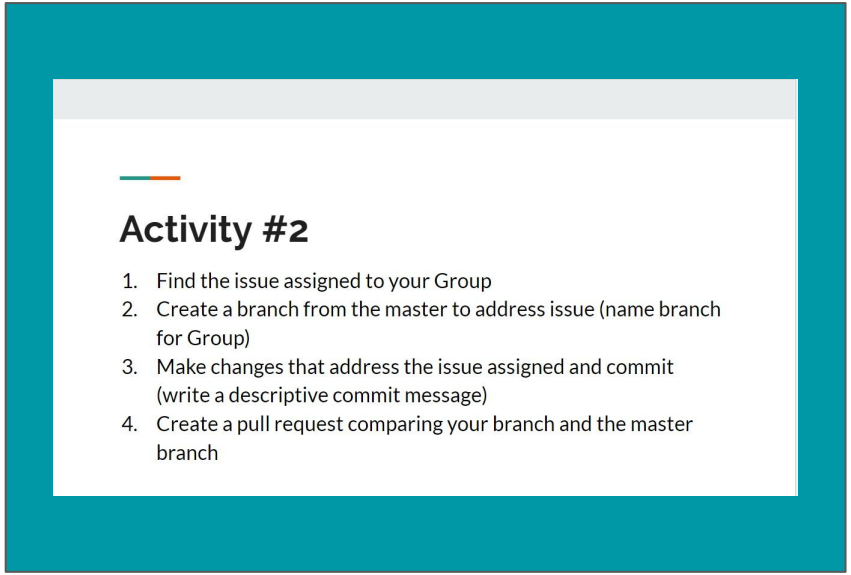
Reappraisal and potential subsequent deaccessioning is used by the RAC to achieve some of
the following objectives:

A.  To correct inaccurate appraisals on collections or reassess items
    that were never appraised.
B.  To align accessioned holdings with current collecting policies.
C.  To prioritize processing backlogs.
D.  To better allocate resources needed for collection maintenance,
    processing, and preservation.
E.  To better assess collection strengths and refine future collecting
    priorities.
F.  To improve overall access to the materials.
```

Version Control Workshop

- Archivists need to feel empowered to create branches, write commit statements, and make and merge pull requests
- Completed pre-workshop activities
  - Created a GitHub account
  - Introductory readings and videos
  - Learned basic GitHub terms and completed simple tasks
- During workshop, split into groups and went through two activities that mimicked working in documentation repositories





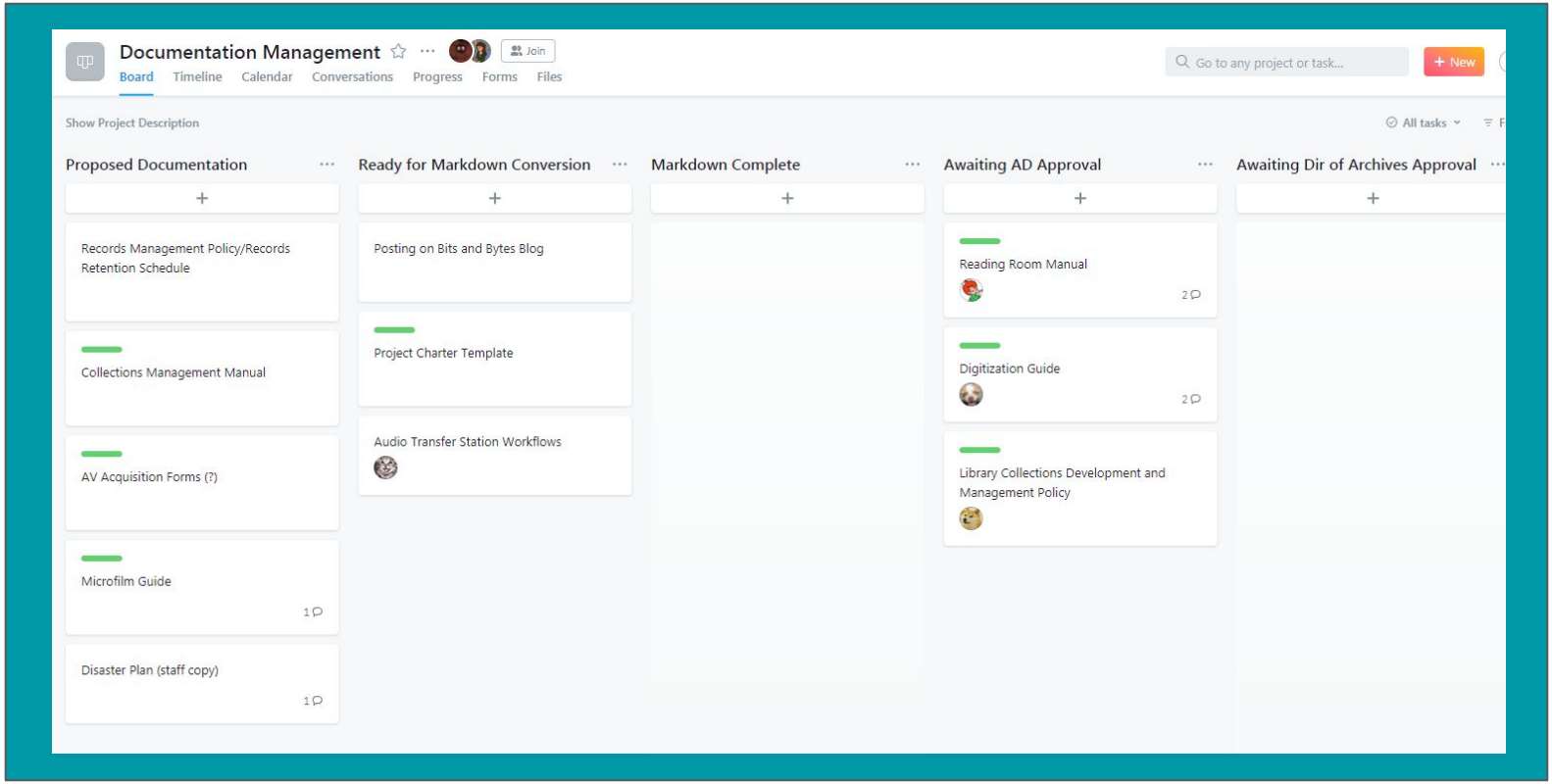
Documentation Proposal and Approval Process

Anyone can propose documentation for site

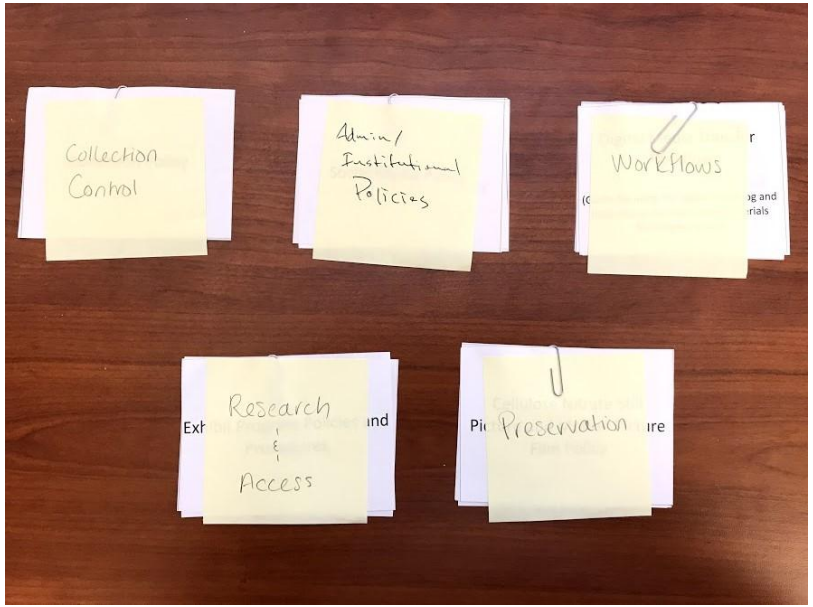
Public or internal?

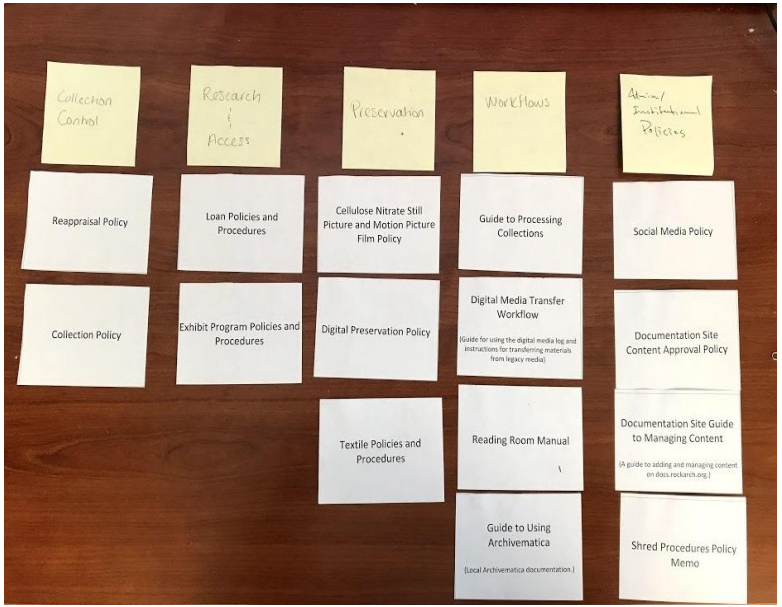
Changes are suggested via GitHub pull request and must go through a review process

Documentation Management



Card Sort Activities





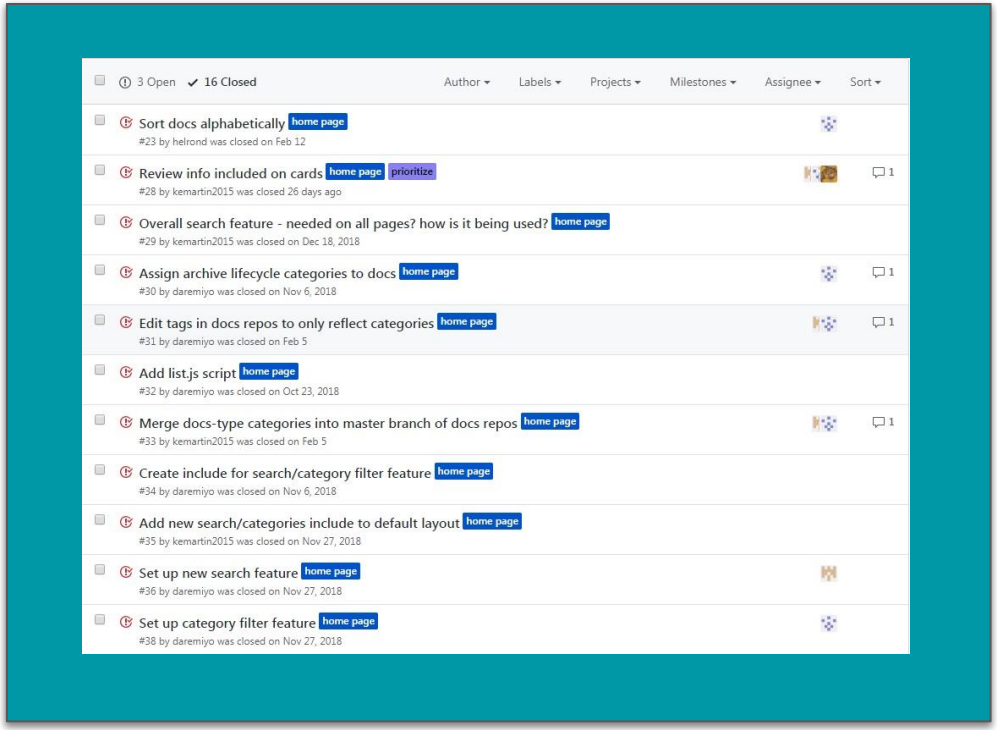
Search this page | Collection Development and Management | Preservation | Arrangement and Description | Reference and Outreach | All

Homepage Redesign

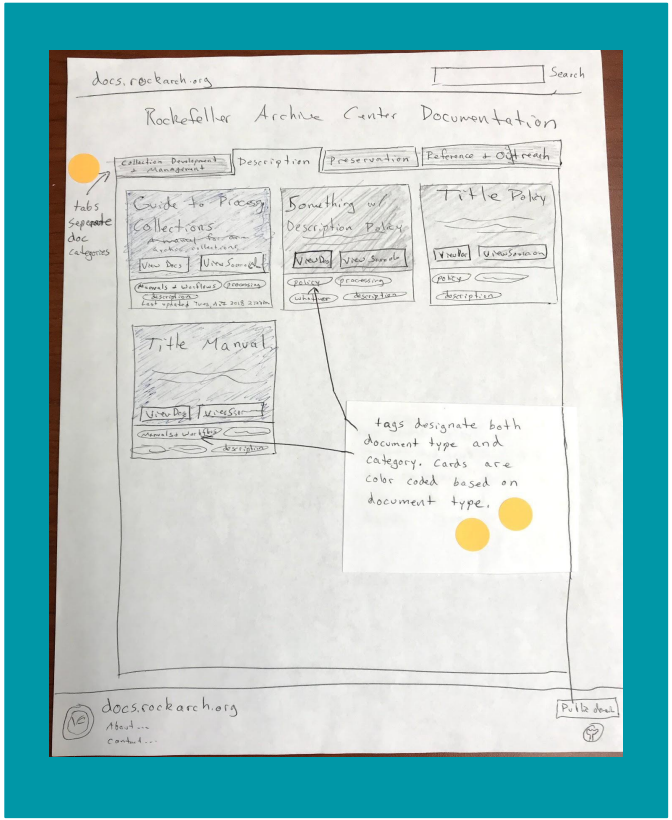
October 2018 - April 2019

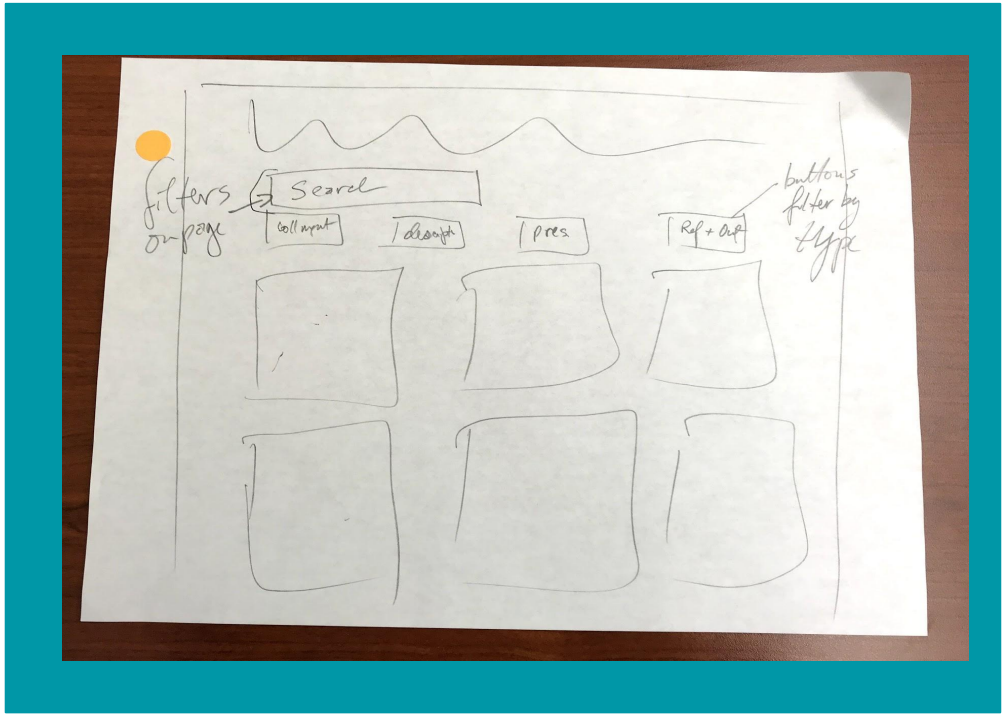
Goals:

- Implement changes to address staff feedback
- Scale down the amount of information on homepage
- Add a filtering function to display only documentation associated with archival lifecycle categories



Homepage Redesign Wireframes





Homepage Redesign: Code Sprints

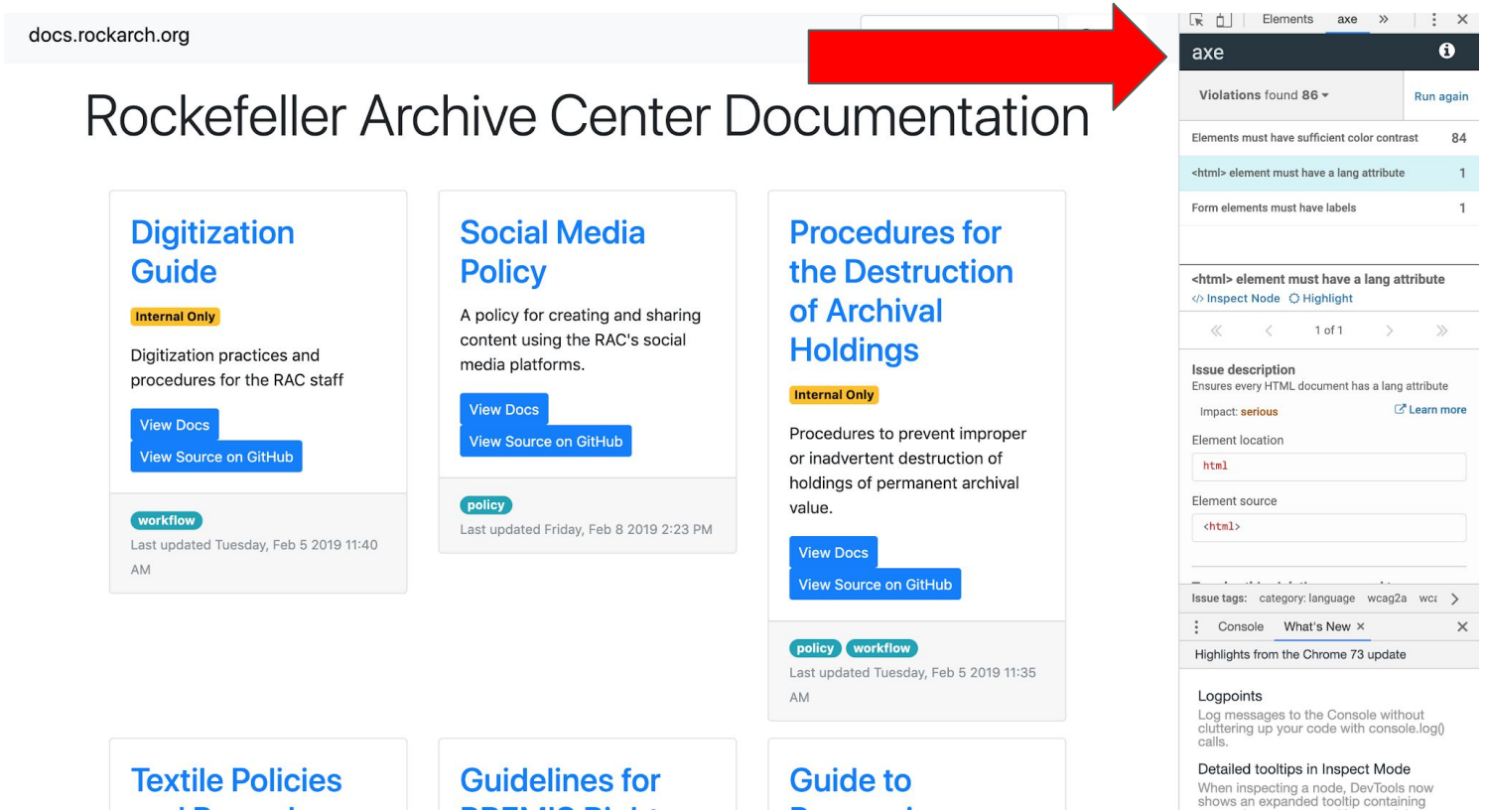
- Our variation on Agile Software Development practices
  - Continual improvement, responsive to change, planned work
- 3-hour time blocks
- Goal was for each of us to close at least one issue during each sprint
- One 15-minute standup meeting in the middle of every sprint
- Push up any changes to our shared GitHub homepage-redesign branch at the end of the sprint

Accessibility

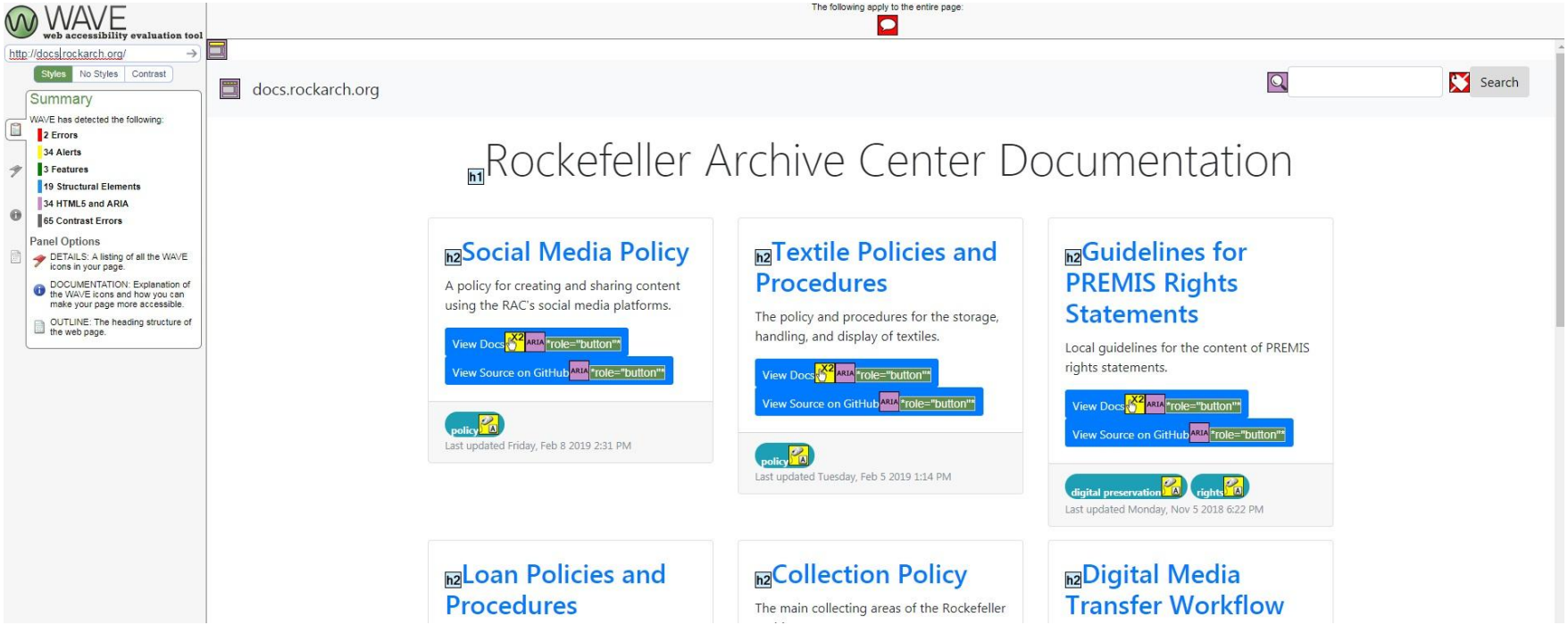
Websites, tools, and applications are usable by as many people as possible, including individuals who have visual, motor, auditory, speech, or cognitive disabilities.

Web Content Accessibility Guidelines (WCAG 2.0) - provide specific requirements for making web content accessible for everyone

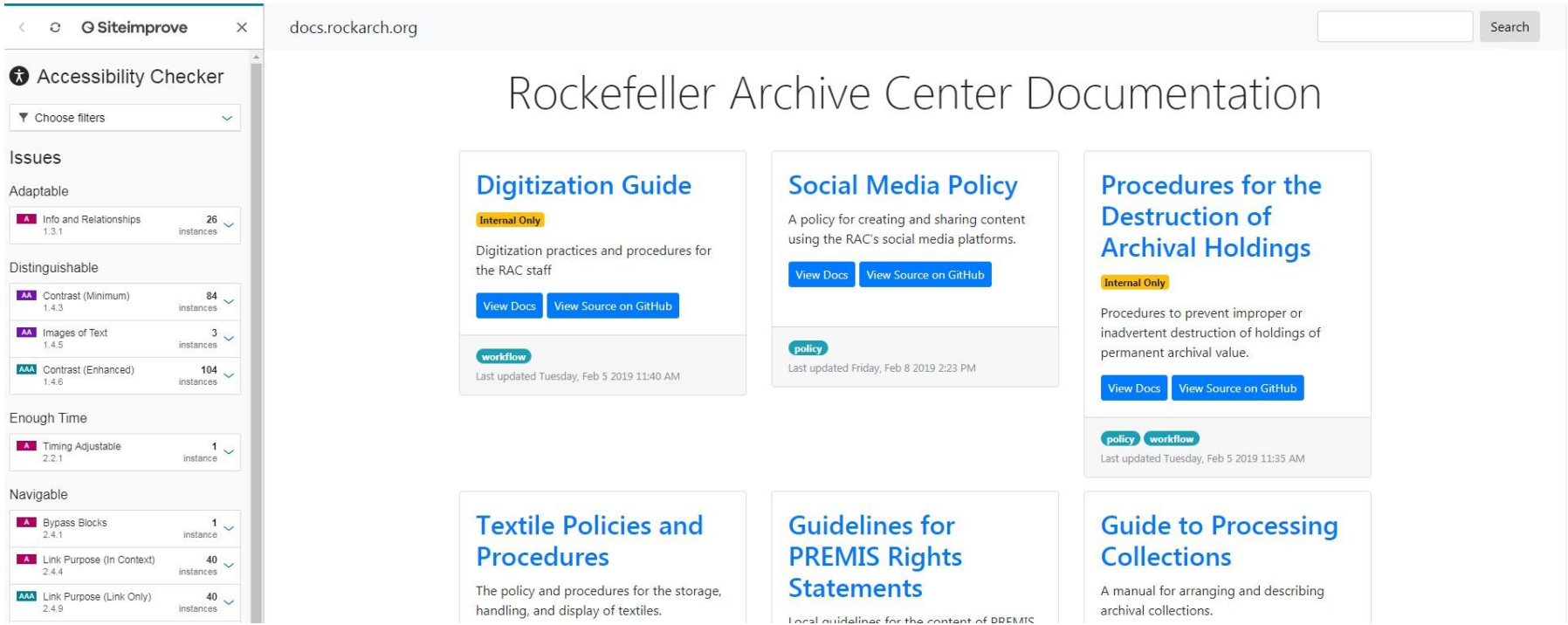
Accessibility: aXe Browser Extension



Accessibility: WAVE Evaluation Tool



Accessibility: Siteimprove Accessibility Checker



Site Promotion

- Initially promoted site in July 2018 blog post
- Promoted site in a series of tweets during SAA 2018









Most Recent Statistics

External Statistics

- Over 1,000 site users
- Most popular month was in August 2018
- Site visitors from Washington, DC, Boston, Los Angeles, London, Seattle, and Chicago
- Most of our users are RAC staff
- Most visited documentation has been the Digital Media Transfer Workflow

Internal Statistics

- 16 staff members have directly converted 20 policies and procedures to Markdown
- 11 new policies and workflows written for the site

Where do we go from here?

- Completed homepage redesign last week
- Conduct usability testing with RAC staff
- Continue making site more accessible

Questions?

Rockefeller Archive Center Documentation Site: https://docs.rockarch.org/

Relevant Blog Posts:

Documentation Site Release: A Tool for Access and Transparency, a Push for Better Documentation Writing: https://blog.rockarch.org/documentation-site-release-a-tool-for-access-and-transparency-a-push-for-better-documentation-writing

Project Electron Update: Aurora and Web Accessibility: https://blog.rockarch.org/project-electron-update-aurora-and-web-accessibility

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