Thank you

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Workshop Scope and Outcomes

Building off other practices in LAMS applying them specifically to born-digital access

- Donor relations
- Pre-custodial interactions
- Processing archival collections
- Risk assessment
- Restrictions and privacy
- Policy frameworks
- Advocacy
- Management considerations
- User experience
Workshop Agenda

Section I (Lecture)

1:30-1:45
Workshop scope and outcomes
Participant introductions

1:45-2:45
What is access?
Preparing for access
Risk assessment
Policy considerations
Advocacy
Access methods and levels

2:45-3:00
Break

Section II (Hands On)

3:00-3:15
Introduction to UX testing

3:15-3:45
UX Testing Activity Part 1

3:45-4:00
Break Optional

4:00-4:30
UX Testing Activity Part 2

4:30-5:00
UX Testing Activity Discussion
Recap/Assessment
Resources for Participants

- Presentation Slides
- Bootcamp Agenda
- Literature Review
- UX Testing Materials
- Participant Preworkshop Report
- OSF (https://osf.io/cp7en/)
This Space Is

- Collaborative, not prescriptive
- Exploratory
- Focused on building a community
Introductions

- Name
- Current role in providing access
Where are we with access?

**My employer is a(n):**
- 56.3% [Academic library or archives]
- 12.5% [Public library or archives]
- 12.5% [Corporate library or archives]
- 12.5% [Museum library or archives]
- 12.5% [Independent archival consultant]
- 12.5% [Special Library-Non-profit Organization (Art library)]
- 12.5% [Non-profit library/ archives]

**Do you/your institution currently provide access to born digital materials?**
- 25% [Yes]
- 12.5% [No]
- 12.5% [Not yet, but researchers can see that we hold born digital materials via cataloging, finding aids, or other descriptive methods]
- 12.5% [No, and the existence of born digital material is generally not yet apparent from our discovery systems]
Where are we with access?

To which types of born digital files is your institution prioritizing access or most interested in providing access? Rank the following from most interested to least (with 1 being most and 13 being least interested) You may assign the same ranking to multiple.

1. Documents
2. A/V
3. Still Images
4. Web Content
5. Email
6. Dataset
7. Disk Images
8. Software
9. Architectural Drawings
10. Maps
11. Digital Art
12. Video Games
13. Other
Where are we with access?

My comfort level with processing, managing, or working with born digital archives can be described as:
16 responses

- Unable to complete these tasks: 50%
- Able to complete these tasks, but very uncomfortable doing so: 18.8%
- Somewhat comfortable completing these tasks: 25%
- Proficient at completing these tasks: 18.8%

My comfort level with providing access to born digital archives can be described as:
15 responses

- Unable to complete these tasks: 40%
- Able to complete these tasks, but very uncomfortable doing so: 33.3%
- Somewhat comfortable completing these tasks: 20%
- Proficient at completing these tasks: 7%

My comfort level with preserving born digital archives (i.e. planning for migrations, conducting integrity checks, etc.) can be described as:
16 responses

- Unable to complete these tasks: 31.3%
- Able to complete these tasks, but very uncomfortable doing so: 18.8%
- Somewhat comfortable completing these tasks: 43.8%
- Proficient at completing these tasks: 4.3%

My interest in providing born digital access is driven primarily by (select all that apply):
16 responses

- Leadership or mission change: 18.8%
- Users requesting access to born digital: 43.8%
- The need to advocate for my born digital: 9 (56.3%)
- We are starting to get larger amounts of data: 6.3%
Where are we with access?

Arrange these perceived barriers to access to born digital material from the biggest to the smallest obstacle (with 1 being the biggest obstacle and 6 being the smallest obstacle):

- Processing or surveying backlog
- Lack of staffing, time, or other organizational infrastructure to implement the workflow, including funding
- Lack of an appropriate discovery system or other technological barriers that are not funding-related
- Lack of understanding of the nature of born digital material
- Fear of inadvertently leaking sensitive institutionally regulated information to users
- Desire to know more about what researchers want before providing access
What Is Access?
Definitions of Access

● How can we define access?
  SAA Glossary:
  n. - 1. The ability to locate relevant information through the use of catalogs, indexes, finding aids, or other tools. - 2. The permission to locate and retrieve information for use (consultation or reference) within legally established restrictions of privacy, confidentiality, and security clearance. - 3. Computing · The physical processes of retrieving information from storage media.

● Think about:
  ○ Discovery versus delivery
  ○ The importance of considering user experience
  ○ How we might identify different means (or levels) of access
Access Can Be Iterative

- How can we frame access around user needs?
- Can we jump to access then improve upon what didn’t work?
- Can we use existing infrastructure & tools to provide access rather than demanding new methods?

Document, document, document!
Preparing for Access
Donor Relations

- Including access considerations in donor informational packages, pre-custodial donor interviews, and donor agreements/deeds
  - AIMS Report Appendix F
  - Born Digital: Guidance for Donors, Dealers, and Archival Repositories (2013 CLIR Report)
  - University of Minnesota
    - UMN Guide for Donors (and Guide for Staff Working With Donors)
    - Transfer Form
    - Deed of Gift Addendum (UMN)
Processing

● Processing for access
  ○ Prioritize description (any description!)
  ○ If access is requested, appraise and provide what you can to the researcher
  ○ Talk to the researcher afterward to identify gaps: do they need more? Less?
  ○ Build findings into practice
● Consider adding finding aid boilerplate about levels of processing (example)
● On-demand appraisal & processing
Risk Assessment, Policy Considerations, and Advocacy
Risk Assessment

- Access motivations vs. security and privacy concerns


Chris Prom’s University of Illinois Email Transfer form, 2014

New York State 2008 Social Security Numbers Access Law
Risk Assessment

1. Identify the risks
2. Rate the risks (likelihood, level of impact)
3. Manage the risks
   a. Avoid
   b. Control
   c. Account for
   d. Transfer
4. Review (and document!) the risks and outcomes

https://www.forensicswiki.org/wiki/Bulk_extractor
Creating Policies

- Do you already have an access policy?
- Policy dependencies: institutions, stakeholders, situations, and collections
- Examples of policies you might want to gather, consult, and align with as you consider access practices and policies:
  - General records schedule and institutional restriction mandates
  - Your library or special collections’ access policy
  - Your institution’s accessibility policy
Policy Use Cases

- Consider various use cases and levels of access
- Sample access policies
  - University of Georgia (specific to born-digital)
  - New York State Archives
  - Getty Research Institute
  - UCLA (specific to born-digital)
- Build a community resource
  - Library Workflow Exchange
  - COPTR Community Owned Workflows (COW)
Advocacy and Program Development

- Interactions with managers, executive leadership, and funders
  - Link need to library mission statement
  - Compile data or stories to support your (concise, easy to remember) message
  - Be explicit about access as an iterative and experimental process
  - Review advocacy resources from the SAA Business Archives Section
- Create advocacy plan worksheet, if helpful
Access Methods and Levels
Access Methods

- Common methods of providing access include:
  - Locked down reading room computer
  - Digital repository or library
  - Other forms of remote access

- Basic methods of discovery and display vs. advanced techniques

- Technical implementation case studies

- Tools
  - BitCurator Access
  - Quick View Plus
  - Anything else?
Levels of Access

- Consider levels of access and the necessity for mediation (or not)

- Factors to consider
  - Content and sensitivity
  - Technical concerns
  - Discovery points
    - Often very siloed: University of Minnesota Digital Environment Overview
  - Usability
  - Institutional capacity and needs
Levels of Access

- **Restricted**
  - No access to material or metadata
  - Access to metadata only

- **Highly mediated**
  - In your reading room
  - In a partner institution’s reading room

- **Managed access**
  - Authenticated
  - Unlimited (i.e., Google Drive)

- **Unmediated web access**
Levels of Access

- Other things to consider
  - Managing risk
  - Usability
  - Staff access
  - Tools as a service

- Let’s discuss

- Take a look at the in-process SAA ERS levels of access project
  - Risk management orientated
Levels of Access

- In-process DLF [Levels of Access Grid](#), focused on
  - Description
  - Tools
  - Support and discovery
  - Policy and documentation
  - Security
  - Accessibility
Collections as Data

- Emerging new methods of use
- Potential to expand use into different communities
- New tools:
  - Natural Language Processing (NLP)
  - Network Analysis
    - http://webarchives.ca/
- Santa Barbara Statement on Collections as Data
- Challenges our resources and skill sets
User Experience (UX) Testing
Crash course in user experience testing

● Why UX test?
● What UX test?
● Methods
  ○ Paper prototyping
  ○ Microfeedback
  ○ Observational
● INCENTIVES are necessary
UX Testing Activity
Tester

- Listen to the observer’s introduction
- Think aloud
- Be candid! And there are no wrong answers
- Ask for help

Observer

- Read the script
- Record the type of device the user has
- Record any intuitive actions
- Record comments the tester makes aloud and body language
- Record any questions the tester has for further discussion
- Help when asked or when frustration is visible
Breakout Groups

- Breakout groups
- 3:15-3:45: Teams work through their first scenario
- 4:00-4:30: Teams switch roles and work through their second scenario

Testers:

Observers:
Report Back

- Move into groups based on your highlighted testing scenario.
- Take 15 minutes to discuss the top 3-5 takeaways from testing this access method. You’ll be reporting back.
- Instructors will share questions with the access providers gathered during the tests.

Recap and Assessment


Possible Next Steps

- Creating an access policy
- How to advocate within institution
- Setting up a computer for access in the reading room
- Create a primer for curators
- Doing UX testing at repository
- More linking/description
- Finish surveying the materials!