

# Memo

To: Randy Olsen, Chair of the Consortium Executive Council  
Martin Raish, BYU Idaho University Librarian  
Brian Roberts, Secretary of the Consortium Executive Council

From: Gordon Daines, Brigham Young University Archivist  
Cory Nimer, Manuscripts Cataloger and Metadata Specialist

Date: 9/25/2009

Re: Report and Recommendations resulting from our trip to BYU Idaho (13 September 2009 to 15 September 2009)

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Cory Nimer and I spent two very productive days in Rexburg interacting with the staff from BYU Idaho Special Collections (Sam Nielson and John Powell) and Technical Services (Chris Fox). The bulk of our time over the two days was spent in providing the training requested by Sam Nielson during a CCLA Special Collections conference call in May 2009. We provided training in the application of *Describing Archives: A Content Standard (DACs)* to archival and manuscript materials and cataloging as well as giving them a quick overview of the CCLA Encoded Archival Description (EAD) Best Practices Guide. We also discussed the proposed replacement systems for INDI.

We provided Sam, John and Chris with a series of in-depth trainings on *DACS*. Our training focused on how to use *DACS* to create high quality finding aids and catalog records. We reviewed the major principles underscoring *DACS* and then discussed how to implement the minimal core descriptive set that the CCLA Special Collections group has adopted. We also provided training for Sam, John, Chris, and several students on archival processing. We reviewed guidelines for minimal processing, full processing and item-level processing. We also discussed the importance of minimally processing all collections before moving on to more detailed processing. We gave Sam, John and Chris a quick overview of the CCLA EAD Best Practices Guide and introduced them to the tools available for implementing the guide's recommendations.

We reviewed the proposed two system solution that will replace the INDI project. We discussed ProcessMaker and its ability to manage workflows. We also reviewed the statements of work that will be guiding our implementation of ProcessMaker. We demonstrated the Archivist's Toolkit and discussed the modifications that we plan to make to it before rolling it out to the BYU system.

We thoroughly enjoyed the opportunity to interact with Sam Nielson, John Powell and Chris Fox and appreciate their hospitality. We feel that the visit was very productive and provided them with the training that they had asked for. We have developed several recommendations that we hope CCLA will encourage them to implement, and we encourage CCLA to provide resources as

appropriate to help them do so. If you have any questions about the recommendations, please contact us at [gordon\\_daines@byu.edu](mailto:gordon_daines@byu.edu) or [cory\\_daines@byu.edu](mailto:cory_daines@byu.edu) .

## Recommendations

### *Archival Processing*

- We recommend that Sam, John and Chris become more conversant with *Describing Archives: A Content Standard* and that they implement its descriptive requirements immediately.
- We recommend that all new collections acquired by Special Collections be minimally processed before being fully processed or item-level processed

### *INDI Replacement System*

- We recommend that a training package be developed by Gordon Daines, BYU Provo University Archivist, and Cory Nimer, BYU Provo Manuscripts Cataloger and Metadata Specialist, upon implementation of a two system solution for the management of archival materials. This training package will be made available to each Consortia partner choosing to utilize the developed archival content management solution.
  - The training package will include:
    - a review of existing workflows and customization of the selected BPM software,
    - assistance in implementation of the selected archival content management tool and training on how to use the tool, and
    - reviews of the *DACS* and *EAD* trainings.
  - The trainings and customizations will most likely require site visits to each participating Consortia partner of at least 1 week.
- We recommend that Sam, John and Chris review the Statements of Work for implementing archival workflows in the Perry Special Collections and indicate how they might need to be adapted to their unique situation. This will assist the customization of ProcessMaker to meet their specific needs.