Location, container and barcode management interviews & scenario testing in ArchivesSpace

Purpose
To understand and confirm the work / activities currently done to make materials available to researchers and try out / imagine how this might work in ArchivesSpace assuming the appropriate data & Yale plug-in.

In the end, we want to have an articulated understanding of how our work with respect to location, barcode and container management is similar, how it is different and what we can learn from each other.

Based on this analysis, we will be able to determine:
- what location, container and barcode normalization might be advantageous
- whether ArchivesSpace with the Yale plugin meets our needs for location, container and barcode managements

Scope
Books and items under bibliographic control are generally out of scope as most location and barcode management processes are handled in Aleph. Books are covered for paging as Special Collections reading rooms handle this mostly outside of Aleph.

Workplan
- develop interview questions / scenarios
- ensure access to ArchivesSpace & set up Yale plug-in -or- get documentation
- schedule sessions with appropriate staff
- [potentially] further exploration of ArchivesSpace
- [potentially] diagram parallel & divergent practices
- [potentially] determine standard policy
- [potentially] data analysis - empirical evidence of how location and barcode data is being stored
Questions and Scenarios

- Can you walk me through how you currently page (retrieve and reshelve) the following materials for a researcher: standard archival box, media item, materials housed in flat files, oral history interviews, materials housed in shared boxes, materials stored offsite, serials described archivally?
- Who in the repository is involved in these requests?
- Are there any regular problems that arise in the course of these scenarios?
- Are you ever unable to locate materials that have been requested? What happens in this scenario?
- Can you walk me through how you currently assign locations and barcodes to boxes? Is this handled different for different types of boxes?
- What are your rules for numbering boxes and/or folders?
- How do you handle box numbering for newly incorporated materials whose intellectual place is not at the end of the arrangement scheme?
- Do you have local rules for numbering oversize containers?
- Do you have any recurring problems regarding box numbers?
- Do you assign barcodes to boxes individually or in batch?
- Do you ingest barcode information into Archivist’s Toolkit? If so, how is this done?
- Where does a box’s location information live? Does it live in one place, or many?
- Are all boxes barcoded, or only specific ones? If so, what rules govern this?
- What is the process for updating location information?
- How do you update locations for materials that are temporarily moved (e.g. box sent to Preservation for treatment)?
- During a recent shelf read, what were the steps involved?
- During a recent shelf read, what were you looking for on the shelves? What documentation were you referring to in the process?
- During a recent shelf read, where did you record information on location discrepancies?
- In the course of creating MARC records for archival collections, what is the pertinent location information? Are there any recurring problems related to this process?