OSSArcFlow Learning Module 3: Using Workflows
Script

This video provides guidance and examples of how libraries, archives, museums, and other collecting institutions can use their documented workflows to self-evaluate, compare against workflows from similar institutions, and identify potential areas of growth and goals for maturity over time.

The OSSArcFlow project sought to address the challenges of implementing born-digital workflows by investigating and documenting current practices in a sample of 12 institutions. The project assembled a group of partners with diverse staffing situations, institution sizes, mandates, and born-digital program attributes, and encouraged them to engage with the workflows as artifacts of current practice. We will hear from some of the partners about how they have engaged with the workflows documenting their own activities and the workflows created by other institutions in order to identify needs, solve problems, and ideate future development.

One of the ways in which institutions can use workflow documentation is to self-evaluate and expose paint points and needs:

> *[Voice of Rebecca Russell, Rice University]*
> It gave us the opportunity to identify some tools and needs that we may or may not have been aware of. One thing was tool integration and also more automation of our workflow.

Tool integration, or hand-offs between systems, was a major pain point identified during the OSSArcFlow project. Different open source tools may generate different kinds of data and metadata outputs that make it difficult to move between systems. Metadata exported from one system may have to be transformed significantly for successful input into another system, like when users move metadata generated within the BitCurator Environment into ArchivesSpace archival description fields.

Institutions might also use the workflow documentation to provide training for internal staff, especially in order to quickly bring new staff up to speed with institutional procedures:

> *[Voice of Rebecca Russell, Rice University]*
> One thing that we were very impressed with was the visual representation of our "as is" workflow. And we used that to create a version in a vertical, one-page layout. And that provides a really great overview to people who are coming into the department and just starting to do work in digital preservation. And it's a really great contextual piece before you get into, sort of, the very detailed processing steps. And we added that to our processing manual as, sort of, the first piece.

This kind of workflow documentation can also be an effective tool for internal communication with stakeholders and other departments, in order to synchronize practices and create more efficient handoffs of information:

> *[Voice of [Matthew] Farrell, Duke University]*
> You know I can describe how I go about acquiring material to my stakeholders, whether those be curators or other processing archivists who are not as engaged in the digital sphere at this point. Or it could even be other departments on campus, so talking to our Digital Collections team, which deals specifically with digitized material. I can describe that in words as long as they'll let me. But I think having the visualization is really key, because you can map what we're doing onto somebody else's process. So maybe Digital Collections has a similar workflow, they don't have to do sensitive data scanning for instance, but they are normalizing material or they're understanding the content via documentation of the technical characteristics, that sort of thing. It really helps to be able to point to that in the workflow in a visualization.

Another way that institutions may use workflow documentation is to examine the practices of other institutions and draw comparisons. This can be especially helpful for sharing institutional tips and strategies. We did this in the in-person partner meetings for the OSSArcFlow project:

> *[Voice of Josh Hogan, Atlanta University Center]*
> The fact that we were able to see that it didn't matter if it was Stanford or us or the Kansas Historical Society. That in every case we were facing a lot of the same issues, and that there were decisions that were made that could be made across different kinds of institutions. So that was, I think, an encouraging thing, as well as a practical thing for us because then we could really borrow ideas from other institutions regardless of their size or what kinds of materials they were working with.

Comparing workflow documentation from multiple institutions can identify emerging trends in the field while also showcasing potential pain points that are common among institutions at similar stages of maturity:

> *[Voice of [Matthew] Farrell, Duke University]*
> It helps identify where the breakdowns or pain points are. I think the pain point exercise that OSSArcFlow engaged in was super useful because it didn't just identify our pain points but identified pain points at our peers. So you know we're all dealing with very similar things and it was useful to see either agreements or where we stood out or someone else stood out as having something be particularly painful for them.

Current archival practitioners, who note that "In the face of many unknowns about stewarding digital materials, archivists can no longer work in silos but must collaborate via participatory networks" advocate for using existing community practices to ground institutional choices.

These workflow comparisons can serve as a springboard for starting broader conversation and information sharing around local strategies for born-digital archiving. The act of sharing documentation can itself help to establish a community of practice:

> *[Voice of Rebecca Russell, Rice University]*
> It provided us the opportunity to connect with a larger network of colleagues who we can reach out to for advice and issues that we encounter doing the work of digital preservation.

By identifying gaps and challenges that arise in workflows, institutions can use this documentation to start more specific conversations around pain points, whether they are procedural, technical, or institutional in nature. The *Guide to Documenting Born-Digital Archival Workflows* includes a questionnaire that can help seed these kinds of conversations.

Workflow documentation can be used to compare and contrast workflow steps, tool use, and policies that effectively shape how institutions carry out their born-digital processing. Institutions continually develop procedures as staff try out new tools and learn new standards.
In seeking to develop robust workflows that further extend and streamline processing, institutions can draw on workflow documentation to ground their own decision making and guidance - providing a horizon of possibilities for developing robust and sustainable processing workflows and outcomes to which institutions can aspire.

For more information on the OSSArcFlow project, please see the OSSArcFlow page on the Educopia website. There you will find the *Guide to Documenting Born-Digital Archival Workflows,* workflow documentation from each of our partner institutions, and digital dossiers outlining the form, function, and future of digital curation at each of their institutions.

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