

Taming Organically Grown Documentation

Best Practices Exchange 2022

Alex Kinnaman & Kyna Herzinger
MetaArchive Technical Documentation Working Group



Digital preservation network
created and hosted by and
for memory organizations

MetaArchive History

- 2004** - Founded as part of NDIIPP funding and activities
- 2006** - Educopia Institute founded to serve as administrative home for MetaArchive
- 2007** - MetaArchive becomes initial Affiliated Community
- 2017** - MetaArchive celebrates 10 years as community-owned, community-led preservation network
- 2020** - MetaArchive adapts with the times through the Changing for Continued Impact Series and embark on new R&D

Values

- Encourage and support the long-term preservation of digital content;
- Promote a cooperative, robust, and decentralized approach to digital preservation;
- Encourage archives, libraries, research institutes, museums, and other such organizations to build their own preservation infrastructures and knowledge rather than outsourcing this core service to external vendors;
- Encourage the growth of distributed digital preservation networks for preserving copies of replicated content in secure, distributed locations over time;
- Maintain a minimal overhead and straightforward mechanisms for collaboration;
- Administer services that have wide applicability to a range of organizations and digital content;
- Utilize and create open standards and systems;
- Ensure that digital materials are stored and maintained in migratable formats and data structures;
- Promote and support high standards for preservation metadata capture;
- Undertake research and development projects to advance digital preservation best practices

Membership

Membership Responsibilities

- Undertake a 3-year membership term
- Take responsibility for content preparation, evaluation, staging, and ingest testing
- Host and maintain a MetaArchive cache (server) and receive storage rewards
- Monitor collections to ensure accurate long-term preservation
- Join and participate on Committees

Member Engagement

MetaArchive is a community of support to help members make informed decisions

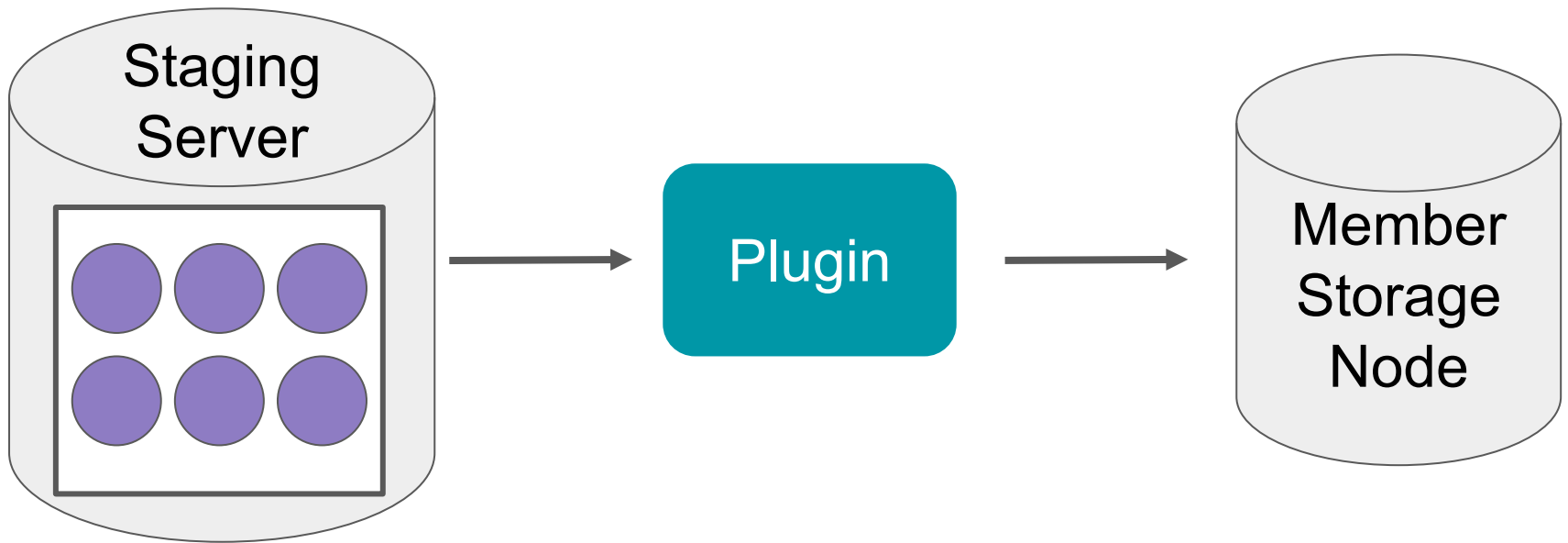
Members-only email list for knowledge exchange

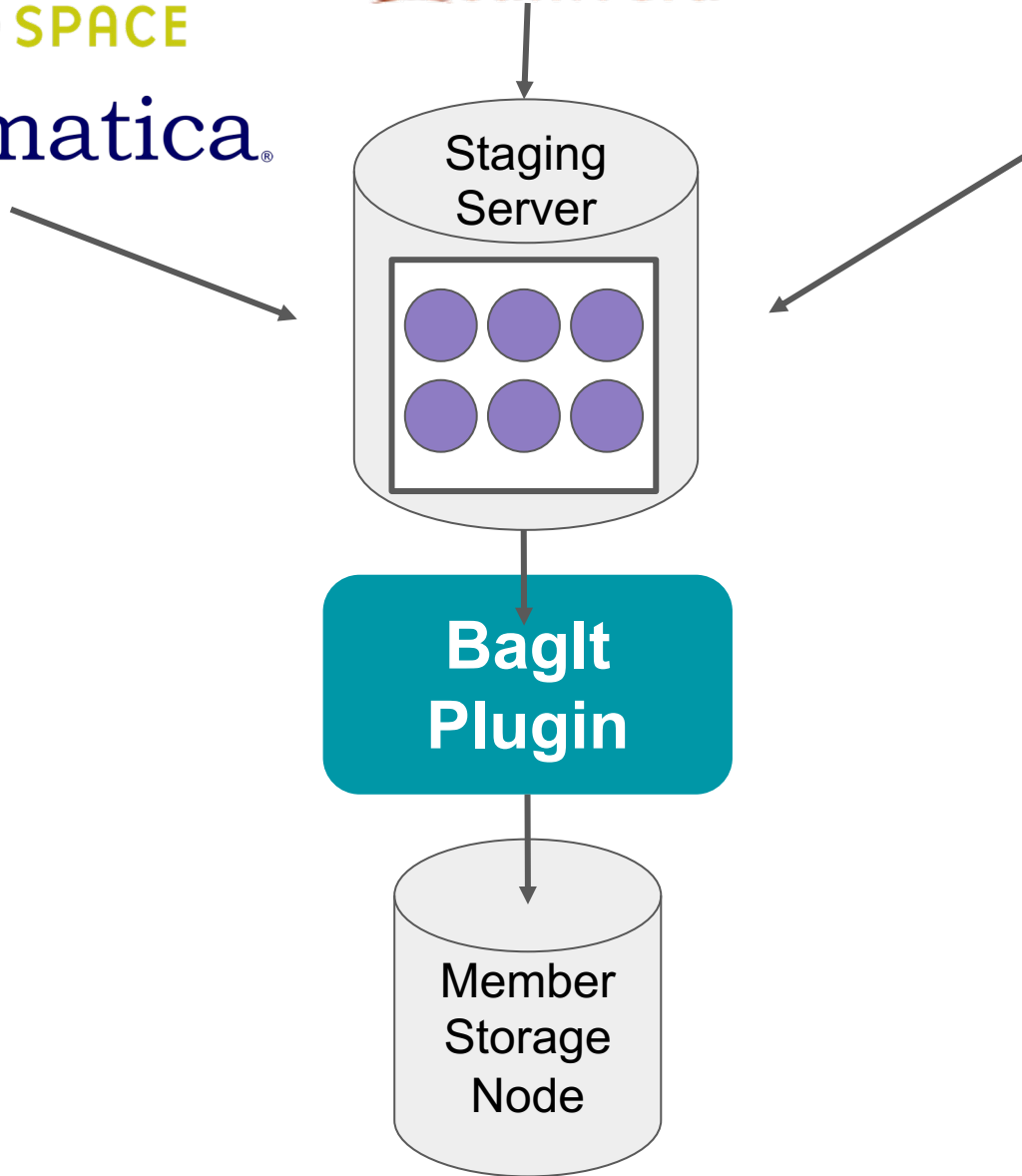
Monthly community calls to share projects and topic-based discussions

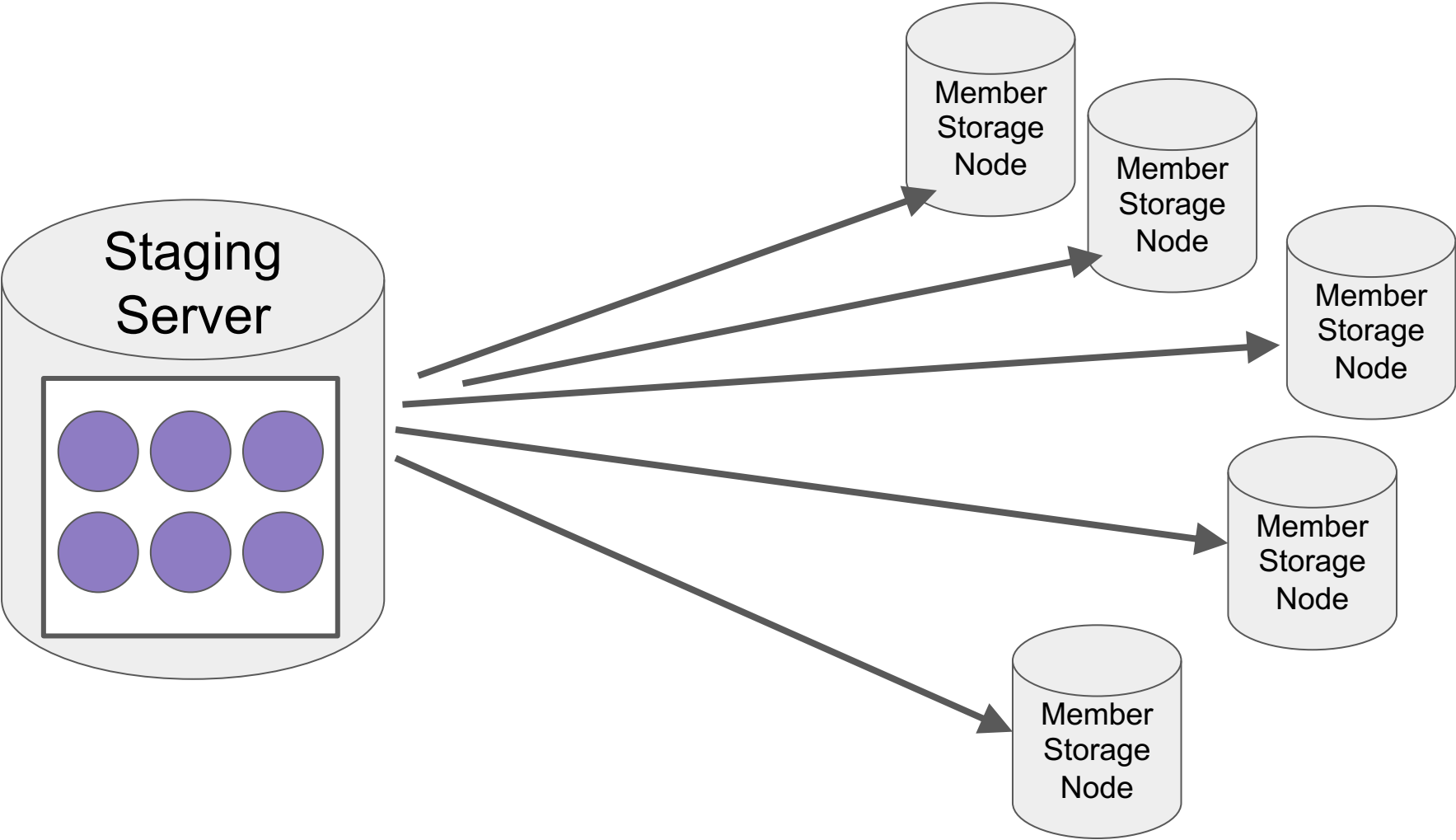
Members

- Auburn University
- Cal Poly San Luis Obispo
- Carnegie Mellon University
- Consorci de Biblioteques Universitaris de Catalunya
- HBCU Library Alliance
- InDiPres
- Isabella Stewart Gardner Museum
- Ohio University
- Oregon State University
- Penn State University
- Pontificia Universidade Catolica do Rio de Janeiro
- Purdue University
- Rockefeller Archives Center
- University of Louisville
- Virginia Tech University
- Washington Research Library Consortium

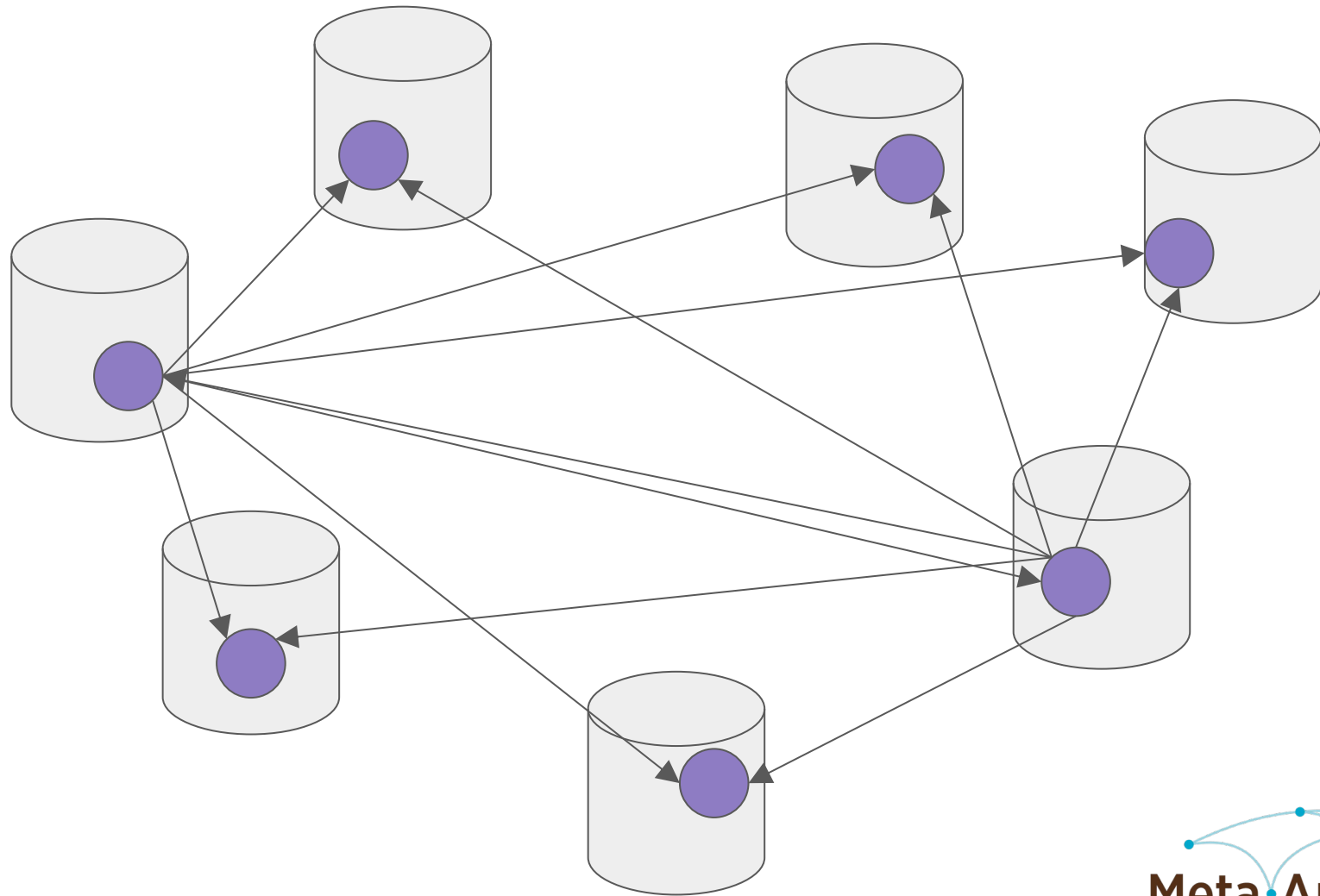
Infrastructure





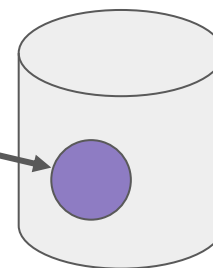
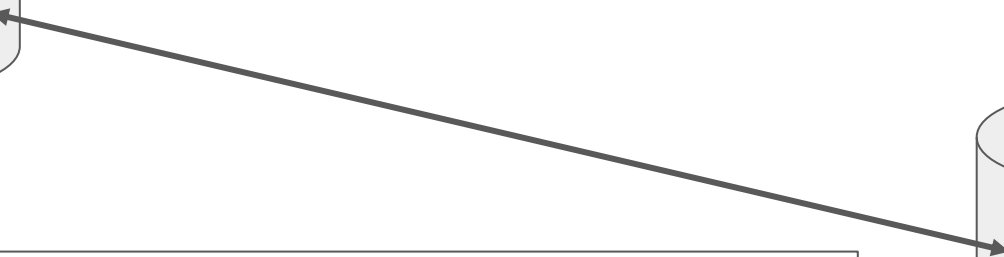
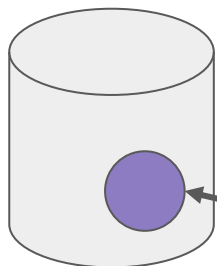


Monitor & Repair



Monitor & Repair

Cf2304e9b416e4c6e4d7a1bb22bf95e4 data/ua-sel_00000268-M.wav
046763d382e557359731edc1d5a8b821 data/dm-ua-sel_bag_002_MODSmetadata.xml
cf9beab2c63082d0d0b40ce9a8faa0a6 data/ua-sel_00000265_001-M.wav
733298738956be7ff4d9ed6b5d021e56 data/ua-sel_00000259-
M.wav



Cf2304e9b416e4c6e4d7a1bb22bf95e4 data/ua-sel_00000268-M.wav
046763d382e557359731edc1d5a8b821 data/dm-ua-sel_bag_002_MODSmetadata.xml
cf9beab2c63082d0d0b40ce9a8faa0a6 data/ua-sel_00000265_001-M.wav
733298738956be7ff4d9ed6b5d021e57 data/ua-sel_00000259-
M.wav

Documentation

Why

- 15+ years of organic growth (and trust us, it's a mess)
- Member survey indicating confusion about where to find information
- CFCI results to enhance and improve the member experience

Charge

...to create and implement a plan for reviewing and updating MetaArchive technical documentation, and to propose a plan for ongoing documentation maintenance...

What's governance got to do with it?

- Values-driven Community
- Decisions and process members committed to
- Transparency
- Mutual support and education
- Included in our annual Action Plan

Project Phases

1. Planning
2. Inventory Assessment
3. Discards and Archives
4. Updates & Migrations
 - a. Prioritize
 - b. Permissions
5. Maintenance Planning
 - a. User management (onboarding/offboarding)
6. Closeout and Reporting

Draft Plan

Background research (Suggested timeframe: 1-2 months)

- Review relevant documentation from the Membership Services Committee:
- Review objectives and actions relating to the goal
 - E.g. “Update Technical & Organizational Documentation”
- Review [MetaWiki](#) (external) - ~480 pages
- Review [InterWiki](#) (internal)- ~190 pages

Draft Plan

Draft a work plan and timeframe for documentation review, migration, and updates (Suggested timeframe: 3-6 months)

- Pare down, prioritize, and figure out where to move items
- Card-sorting activity by “big bucket”
- Maybe identify what can be archived or nixed (two buckets, not one: archive AND delete)
- Hone buckets as needed (“homework” before each meeting)
- 5 meetings in 2022; led by separate person who pre-sorts in advance of the meeting in preparation for the meeting
 - About (prospective and new members) (June)
 - Governance (July)
 - Outreach & Advocacy (August)
 - Research (pubs) (September)
 - Technical (separate roles) (October)

Draft Plan

Implement work plan (Suggested timeframe: 6-18 months)

- Following the step above, plan on a years' time to divvy up and tackle the work

Propose a plan for ongoing documentation maintenance (Suggested timeframe: 3 months)

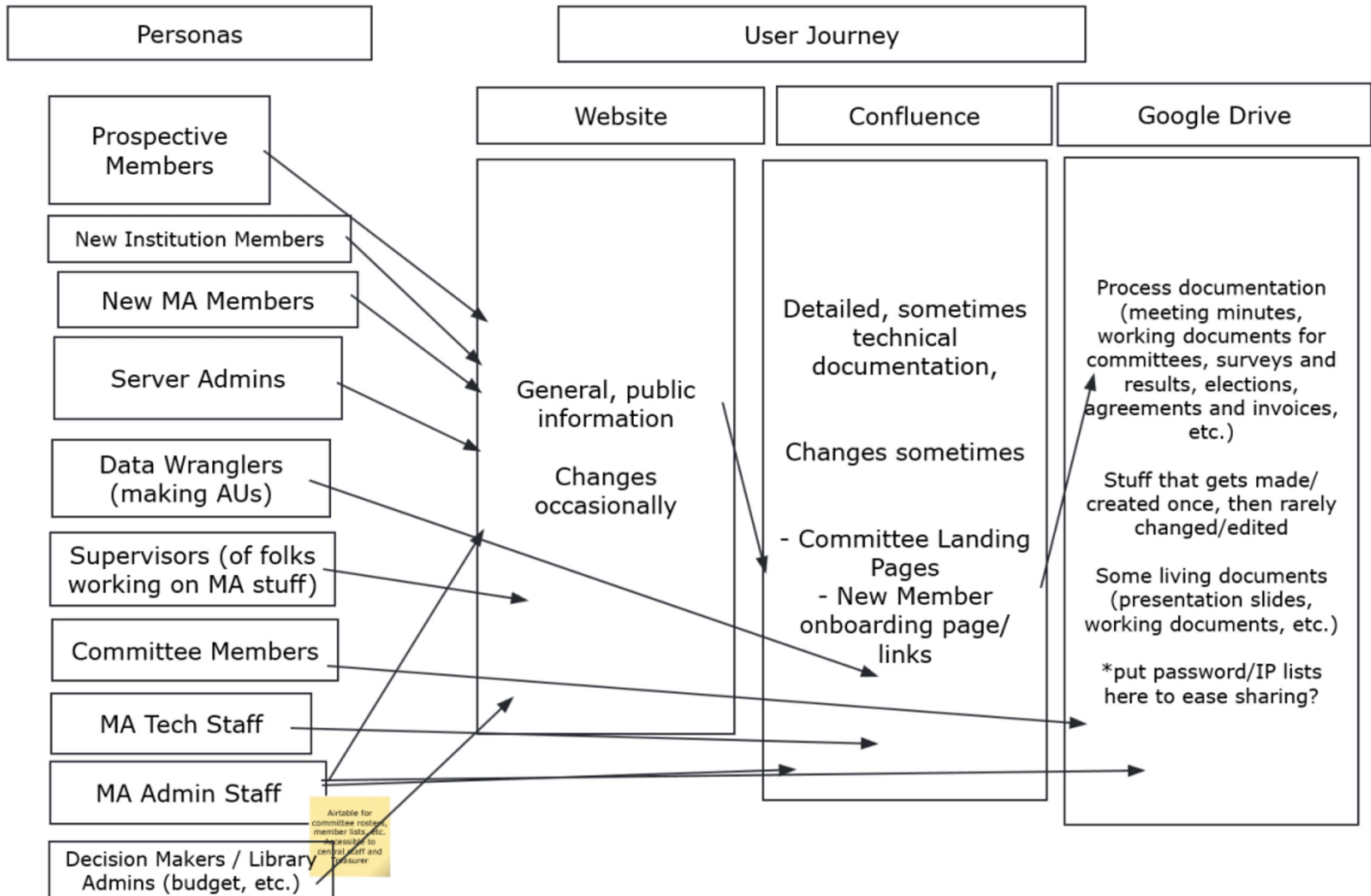
Journey Mapping: Stakeholders

- Prospective members
- New individual or institutional members
- Existing or long-time Members
- Server admins
- Data wranglers
- Supervisors
- Committee members
- MetaArchive Tech Staff
- MetaArchive Admin Staff
- Library Administrators

Journey Mapping: Access Routes

- MetaArchive Website
 - Public information
 - Rarely changes
- Confluence
 - Detailed, sometimes technical documentation
 - Sometimes changes
- Google Drive
 - Process documentation
 - Rarely changed/edited
 - Challenge: Ensuring long-term access during periods of leadership turnover

Journey Mapping Visual



Rolling up our sleeves

- Initial card-sorting activity into big buckets
- Friday working hours for low hanging fruit
 - Identifying what can be deleted
 - Saving one and done files to Google Drive
- Technical documentation mapping (in process)
 - Identify structure
 - Identify documentation to update

Card Sorting

Category



Light Green Rows are COMPLETE			
Light Yellow Rows are COMPLEX (see notes field)			
Light Red Rows are DISCARD			
	t: Steering Committee Discussion 3 Questions	Governance	
285	MetaArchive Capacity Development: Steering Committee Discussion 4 Questions	Governance	
286	MetaArchive Capacity Development: Steering Committee Discussion 5 Questions	Governance	
287	MetaArchive Capacity Development: Steering Committee Discussion 6 Questions	Governance	
288	MetaArchive Capacity Development: Steering Committee Survey	Governance	
289	MetaArchive Capacity Development: Sub-Committee Survey	Governance	
290	MetaArchive Capacity Development: Working Groups Survey	Governance	
291	MetaArchive Fixity Recommendations	Technical-User	Conter
292	MetaArchive Format Management Recommendations	Technical-User	Conter
293	MetaArchive Ingest Procedures Overview	Technical-User	Conter
294	MetaArchive Metadata Brainstorm Whiteboard	Technical-staff?	
295	MetaArchive Metadata Survey Data	Governance	
296	MetaArchive OAIS Definitions	Technical-User; Ref	Conter
297	MetaArchive Preservation Planning	Technical-User; refe	Conter
298	MetaArchive Simple Upload & Ingest Development	Technical-User; refe	Conter
299	MetaArchive Steering Committee	Governance	
300	MetaArchive Sub-Committees	Governance	
301	MetaArchive Versioning Policy Draft Follow-Up Survey	Governance	
302	MetaArchive Working Groups	Governance	
303	MetaArchive/Chronopolis Transfer Phase One	Technical - Staff	
304	Metadata WG Minutes 04242014	Governance	
305	Metadata WG Minutes 04282014	Governance	

Example of the MetaWik

Shows category by topic and by level of appraisal

What's Working

- Friday working hours
 - No need to prep ahead of time
 - Join as able
 - Wider engagement
- Agreeing to archive AND delete where necessary
- “Card sorting” under wide categories

Pain Points

- Knowing where the canonical information actually is (the answer is, EVERYWHERE)
- Technical documentation wrangling and updates
- IP address list changes often; deciding what information goes into which access route

Discussion

- How to engage the whole community throughout the process?
- How to communicate/educate members at the end of the process?
- What was forgotten?
- What questions do you have?

Thank you!

Contact:

Hannah Wang
MetaArchive Community
Facilitator

hannah.wang@educopia.org

Connect with us:

metaarchive.org/

[@metaarchive](https://twitter.com/metaarchive)

Slides:

<https://bit.ly/MAatBPE22>

