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## Northwest Digital Archives: Evolving Access to Archives and Special Collections in the Northwest

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# Northwest Digital Archives:

## Evolving Access to Archives and Special Collections in the Northwest

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As library catalogs that offer general access to a wide range of materials continue to evolve, so do specialized tools that offer more detailed access to particular types of materials. Few areas have seen as much activity and as many changes over the last ten or fifteen years as archives and special collections. The Northwest Digital Archives (NWDA) program at the Orbis Cascade Alliance is in its seventh year of building effective access to archives and special collections materials in the Northwest. The program has evolved over time to meet the changing needs of its member institutions and their researchers and will continue to evolve to expose these often-hidden unique collections.

NWDA offers enhanced access to archives and special collections materials in Idaho, Montana, Oregon, Alaska and Washington through a union database of finding aids, or descriptions of those materials by collection. Finding aids provide varying levels of detail on collections beyond the MARC record. The ability to

search across them provides researchers with a level of access to information about collections that is not available through any other source.

Excellent search engine exposure also enhances access. Each collection in NWDA also has a MARC record in WorldCat and a local catalog, and most of those records link to the finding aid in NWDA through the 856 field. Members who have digitized materials from collections can link to those images from item-level or folder-level descriptions in the finding aid in the NWDA database.

The finding aids are encoded in an XML document type definition (DTD) called Encoded Archival Description (EAD). In the past, finding aids for archival collections were most commonly created as typescript or word processing documents. Some descriptive standards existed, but local practices prevailed. Unlike library cataloging, with its natural incentive to save costs by sharing and distributing copy cataloging, archives and special collections items are unique, and nearly all cataloging is entirely original. Descriptive practices have historically been shaped by the nature of each collection, with strong arguments made for particularized rather than standardized practices. With the development of new library catalogs, EAD, the World Wide Web, and a general mandate

The screenshot shows the NWDA website interface. At the top, there is a navigation bar with tabs for 'home', 'search', 'about', 'contact us', and 'member tools'. Below this is the title 'Guide to the Ruth and Latrobe Carroll Papers 1932-1980'. A search bar is located on the left side. The main content area is titled 'Overview of the Collection' and includes the following information:

- Creator:** Carroll, Ruth, 1899-Carroll, Latrobe
- Title:** Ruth and Latrobe Carroll Papers
- Dates:** 1932-1980 (inclusive)
- Quantity:** 7.25 linear feet (14 containers)
- Collection Number:** AX 710
- Summary:** Latrobe Carroll (1894-1996) and Ruth Carroll (1899-1999) were American authors of children's literature. The collection includes manuscripts, illustrations and correspondence that reflect the work of Ruth and Latrobe Carroll.
- Repository:** University of Oregon Libraries  
Special Collections & University Archives  
1299 University of Oregon  
Eugene, OR 97403-1299 USA  
URL: <http://libweb.uoregon.edu/speccoll/index.html>
- Languages:** Collection materials are in English.
- Sponsor:** Funding for encoding this finding aid was provided through a grant awarded by the National Endowment for the Humanities.

Below the overview, there is a section for 'Biographical Note' which includes the following text:

(Archer) Latrobe Carroll (January 5, 1894-November 30, 1996) was born in Washington D.C and passed away in Stamford, Connecticut. He received his education from Harvard University.

Carroll was a member of the Authors League of America, Friends of the Library (Asheville); second vice president 1960-

Example of a finding aid in the Northwest Digital Archives.

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**Current members of the Northwest Digital Archives program:**

- Alaska State Library
- Central Oregon Community College
- Central Washington University
- Eastern Washington State Historical Society/Northwest Museum of Arts & Culture
- Eastern Washington University
- Gonzaga University
- Idaho State Historical Society
- Lane Community College
- Lewis & Clark College
- Montana Historical Society
- Oregon Health & Science University
- Oregon Historical Society
- Oregon Institute of Technology

to improve collection access to expanding audiences, archivists have developed and begun to adhere to more standardized methods for describing groups of archival and special collections materials. In 2004, the Society of American Archivists released *Describing Archives: A Content Standard* (DACS), which for the first time prescribes minimal and optimal elements that should be present in any description of items from or groupings of archival materials (Society of American Archivists 2004).

NWDA began in 2002 with funding from the National Endowment for the Humanities (NEH) and National Historical Publications and Records Commission (NHPRC). The project grew with additional funding from those same agencies in 2005 and became a program of the Orbis Cascade Alliance in 2007.

The Alliance’s administrative and fiscal home is the University of Oregon, and the NWDA Program Manager is an Alliance employee. NWDA’s technical infrastructure is hosted by Washington State University, with Head of Systems Al Cornish serving as Database Administrator. A half-time student programmer helps him with system maintenance and development. Member fees support this staff, software, hardware, and costs associated with telephone and in-person meetings. NWDA gained new members from the Alliance and began as a program with thirty-one members in July 2007.

NWDA uses both Google metrics and internal reports to track usage. Members can access basic usage reports, which show how many of their finding aids are retrieved each month, on the member Web site (Northwest Digital Archives <http://nwda-db.wsulibs.wsu.edu/reports/document.pl>). These reports show a consistent upward trend in use. In January 2006, only 24 finding aids were retrieved from the database, but by January 2008 use had

climbed to over 15,000 retrievals a month. Since mid-2008, database use has been consistent with 20,000 to 22,000 finding aids retrieved each month. Over the same three-year period, the pathway that users of the NWDA site use to get to the finding aids has changed considerably. While researchers first came in primarily through the NWDA search and retrieval site, that quickly changed once the finding aids were exposed to search engines through Google sitemaps in mid-2006. The proportion of entry from search engines and referring sites quickly increased to around 50 percent and since October 2007 has stayed around 90 percent. Of that 90 percent, about two-thirds are from search engines and one-third from referring sites, which include library catalogs, Wikipedia, and sites that focus on specific subjects.

Google metrics give much more detail on these visitors and how they behave on the site. The most commonly retrieved finding aids are for the Montana State Prison Records at the Montana Historical Society, the Montana Ku Klux Klan Records and the Expo ‘74 World’s Fair Records at the Eastern Washington State Historical Society, and the Bill Bowerman Papers at the University of Oregon. Most visitors are from the United States, but there is also significant use from Canada, the United Kingdom, Germany, and Australia. Within the United States, most visitors come from within the Northwest (primarily Seattle, Portland, Missoula, Spokane, and Eugene), but visitors from New York appear in the top 20. Visitors view an average of two pages on each visit, and stay on each page for just under two and a half minutes. Most keyword searches were on personal names, followed closely by organization names (Google Metrics run on [nwda-db.wsulibs.wsu.edu](http://nwda-db.wsulibs.wsu.edu) for March 1, 2008–January 15, 2009).



Improved discovery on the Web also leads to increased collection use. NWDA members report increases in collection use since they became consortium members. In a spring 2008 survey of the membership, 50 percent of members strongly agreed that participation in NWDA has increased the use of their collections, with an additional 31 percent somewhat agreeing with that statement. Nearly half the members estimated increases in use at 1 percent to 10 percent, with another one-third estimating increases in use at 11 percent to 20 percent (NWDA Program Assessment 2007). Anecdotally, many members report that researchers increasingly appear in their reading rooms with finding aids printed out from NWDA and knowing exactly what they would like to see.

The design and functionality of the first NWDA search interface, made available in summer 2004, were based largely on the needs and preferences of the archivists working on the NWDA project. Decisions about the site's functionality, appearance, and other factors were often difficult to make, as they were based on opinions about the needs of researchers rather than direct or documentable information. The original Web site was intended to serve both NWDA project members and their researchers, and the navigation and terminology reflected this dual audience. In 2005, with discussions of general usability more visible within the library and archives profession and with a need for a more rational basis on which to shape the site, NWDA formed a usability testing working group (UTWG) to guide the consortium's work. NWDA's commitment to usability principles and testing has involved new skills and significant time commitments from participating members on behalf of the consortium, and it has resulted in significant changes to and important improvements in the site's ability to effectively serve researchers.



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The UTWG formulated usability principles in January 2006 based on Jakob Nielsen's work and on Web site accessibility needs for users with disabilities (Orbis Cascade Alliance 2006). The group followed with its first round of usability testing at the annual meeting of Northwest Archivists in Butte, Montana, in May 2006. The test subjects were other archivists not associated with NWDA. One UTWG member interviewed subjects and one took notes. Test subjects were allowed to explore the site with little imposed structure. The results of this test showed that NWDA needed to focus on keyword rather than browse searching and revealed some key navigation issues that had not previously been noticed. Resulting changes included a keyword search box on the home page and greater consistency in navigation on the site (Orbis Cascade Alliance 2006).

Tony Kurtz at Western Washington University and Donna McCrea at the University of Montana performed the second round of usability testing in late 2006 and early 2007 with undergraduates at their institutions. This testing was more formal, with scripts and Institutional Review Board approval. Kurtz and McCrea recorded and fully transcribed the interviews. The resulting report made a number of crucial recommendations that included eliminating or moving much of the information on the NWDA page that was intended for member institutions; clarifying search options; providing more context



Current members of the Northwest Digital Archives program:

- Oregon State University
- Pacific Lutheran University
- Seattle Municipal Archives
- Museum of History & Industry
- University of Alaska Fairbanks
- University of Idaho
- University of Montana
- University of Oregon
- University of Washington
- Washington State University
- Western Oregon University
- Western Washington University
- Whitman College
- Whitworth University
- Willamette University



to help users understand what finding aids are; clarifying search results; providing a search within the finding aid; and making the printing option clearer. NWDA implemented these recommendations that same year (Orbis Cascade Alliance 2006).

Tiah Edmunson-Morton of Oregon State University performed the third round of usability testing in early 2007, focusing on finding aid presentation rather than searching. Like round two, these tests were scripted and transcribed. Her tests showed that subjects scrolled rather than read lengthy finding aids; wanted better options to search and navigate within finding aids; were confused by lingering archival jargon; and had varying opinions on whether the site satisfied their needs for detail. Specific recommendations included modifications to the navigation sidebar, addition of an expand-collapse function, changes in sequencing and fonts, clearer divisions between sections, and direct links to repository homepages (Orbis Cascade Alliance 2006). NWDA implemented all of these recommendations by summer 2007 as part of a larger site redesign that incorporated new graphics and a cleaner interface. That same summer, the Usability Testing Working Group was renamed the Usability Design Working Group (UDWG) with a broader charge to shape the development of the NWDA site.

In 2008, the UDWG did two additional rounds of usability testing. Round four, again performed by Edmunson-Morton, was a follow-up to round three and tested the subjects' reactions to changes made to the site. Their responses to some elements were positive, including repository links and the search within a finding aid function. Other responses indicated that some changes, including some aspects of the search within the finding aid and the expand-collapse function, need additional refinements or are not working as expected. Both users and working group members had recom-

mendations for additional changes based on their results (Orbis Cascade Alliance 2008). Round five of testing, performed by Megan Friedel of the Oregon Historical Society, tested the search experience on the site, including the basic and advanced searches, searching within a finding aid, and entry from referring sites like library catalogs and search engines. She found that a number of small and larger revisions are needed to make the site easier to use (Orbis Cascade Alliance 2008). NWDA is currently reviewing these results and considering what changes to make to the site next.

Usability testing data has provided the group with a better-supported framework on which to base changes to the site: real users have told NWDA what does and doesn't meet their needs and showed us what they most want from the site. Naturally, member institutions and working group members also have the ability to shape improvements and changes to the site, but the focus on users has helped NWDA get away from "designing for ourselves." Usability testing has also changed to reflect changes in use: while it was essential early in the program to test primarily the NWDA site and search functions, the fact that 90 percent of users now come in through referring sites means that it is now much more important to optimize that experience.

This stance is also shaping NWDA's future program. Since 2004, NWDA has wanted to move beyond metadata to offer considerable access to digitized archival content, but the planning and needs assessment for such a project was beyond the project's capacity. The Alliance merger provided the impetus and opportunity for that planning. Since 2007, NWDA has been studying existing digital programs within NWDA and the Alliance, establishing priority researcher audiences across institutions, and asking NWDA and Alliance members about their needs and desires for programs, best prac-





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tices, training, and services. In conjunction with Elizabeth Yakel of the University of Michigan’s School of Information, NWDA has conducted interviews with researchers from priority audiences to assess their needs and desires for selection and presentation of digitized archival content. The results, currently being compiled, will shape the direction of a future program that will integrate content hosting, reformatting services, meta-search, and digital preservation. NWDA has received a Collaborative Planning Grant from the Institute for Museum and Library Services to propel the program toward reality.

With its commitment to usability testing, skills developed within the group, and looking forward to expanded digital services in the future, NWDA will continue to build an effective program to enhance access to those unique collections that, in a world where published materials are increasingly universally accessible, are the lifeblood and definition of the institutions that hold them. 

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