OASIS ANNUAL REPORT, 2002-2003

Steering Committee: Kate Bowers, University Archives; Leslie Morris, Houghton Library (chair); Susan von Salis, Harvard University Art Museums; Julie Wetherill and Lee Mandell, OIS; Susan Lee, ULC.

Background: A publicly available Harvard catalog since July 1998, OASIS provides centralized access to a growing percentage of finding aids for collections at Harvard. These finding aids are detailed descriptions of collections that contain a wide variety of materials, including letters, diaries, photographs, drawings, printed material, and objects. The search engine behind OASIS is OpenText 5, accessed through a Harvard-customized version of a web gateway that was originally developed by the University of Michigan's Digital Library Production Services.

OASIS began with seven participating repositories; this year, membership reached 16 (up from 13 last year), with the addition of the Loeb Graduate School of Design Library, the Law School Library, and the Museum of Comparative Zoology. The Ukrainian Research Institute and the Radcliffe Archives are in the process of approval.

The Steering Committee meets every other month, alternating with the OASIS Users/Liaisons Group, which also meets every other month.

As of July 1, OASIS included 1686 finding aids (140 MB total file size), up from 560 (75.4 MB) in June 2002.

Developments in 2002-2003

System reimplementation. The Reimplementation Working Group, consisting of Kate Bowers, University Archives; Jackie Dean, Houghton; David Ferris, Law; Virginia Hunt, Countway; Lee Mandell, OIS; Connie Mayer, Loeb Music; Leslie Morris, Houghton; and Susan von Salis, HUAM, began twice-monthly meetings in March, and completed drafting functional requirements in mid-June. Tamino will be replacing OpenText 5 as the OASIS search engine, and the user interface will be redesigned in light of data gathered through last year’s User Survey. The functional requirements outline is attached as an appendix to this report; but the guiding principle has been to make basic functionality as similar as possible to that available in HOLLIS and VIA with, of course, the add-on functionality necessary for the smooth working of this particular system.

EAD workshops. Training workshops, taught by Susan von Salis of HUAM and Kim Brookes of the Radcliffe Institute, have been offered ten times since 1998, and are on a twice-yearly schedule administered by OIS. This year, 25 individuals were trained, bringing the total to date to 138. The Workshop is one of the prerequisites for OASIS participation.
Standards. Perhaps the most important, and time-consuming, work done by the Steering Committee (which also serves as Harvard=s EAD Standards Committee) lies in developing standards and best practice for OASIS participants. This year:

♦ HOLLIS record guidelines. Initial difficulties with Aleph--namely, its inability to support >555 (Indexes/finding aids note) links to finding aids--were finally overcome in September 2002. The system now supports this.

♦ Review of EAD 2002. Following the official release last September of the newest version of the EAD DTD, called EAD 2002, the Steering Committee spent several meetings reviewing the changes, and possible implications for reimplementation. It was decided that, while the changes appeared to be minor, it would be more prudent to wait to migrate OASIS to the newer EAD DTD until some other large database of finding aids has made a successful migration.

♦ Review of RLG Best Practice Guidelines. RLG released a new version of its Best Practice guidelines in September 2002, which the Steering Committee examined and compared to the Harvard guidelines. RLG recommends a heavy use of element attributes, which the Committee felt adds greatly to the markup overhead without a gain in utility. On the other hand, their recommendations on information to be included in the <eadheader>, which would facilitate system sharing of finding aids, and which could be added programatically to existing finding aids, did seem useful, and will be examined further when Harvard implementation of EAD 2002 is closer on the horizon.

♦ Quality control. For some time, the Steering Committee has debated whether it is the repository who is approved for OASIS participation, or the individual at the repository. There are, unfortunately, bad finding aids in OASIS, despite ongoing education and support. In an effort to address this problem without becoming the EAD "police," the Steering Committee decided that if the OASIS Liaison at a repository changed, the repository must be re-accredited. The new Liaison will be required to attend the Workshop, will be assigned a "buddy," and will submit a finding aid for approval. Further, error reports (generated when a repository submits an invalid EAD instance) will go automatically to the Steering Committee. We hope these measures will help us identify those who need help at an early stage, and improve the quality of the data in OASIS.

OASIS Users Group. Following discussions within the OASIS Liaisons group, the Steering Committee decided there was a need for a more broadly based group that would be open to individuals from repositories that were considering participation in OASIS. Thus the Users Group was formed, to include both OASIS/EAD practitioners, and anyone at Harvard with an interest in OASIS. We hope this will encourage greater participation and an easier flow of expertise from the experienced to the beginners. The Liaisons Group will continue as the official advisory group to the Steering Committee, and will meet when necessary following User Group meetings. Simultaneously, an OASIS-USERS list was established.

Retrospective conversion projects. The impact of the LDI-funded Houghton and Schlesinger retrospective conversion projects on the growth of the database has been dramatic, with OASIS reaching 1,000 finding aids in January 2003. Houghton, which is outsourcing most of its EAD markup, reached 1,000 finding aids (of an estimated 1400) six months later, in June 2003. Schlesinger, which is doing all its conversion in-house, has converted 149 of its total of 191. As
expected, the growth of the database has highlighted the weaknesses of the current search engine and user interface, with more searches resulting in an unmanageable number of hits. The new OASIS, expected to debut in fall 2003, is eagerly awaited by public services archivists and librarians.

**Steering Committee priorities for the coming year**

*Reimplementation of OASIS.* If the new OASIS is to be ready for Fall 2003, much work will need to be done in the summer and early fall. We expect this to take our available time and attention. Once the system is public, we expect to spend significant time on expanding and fine-tuning the help screens in particular.

*Updating the OASIS Support Site.* The Support Site has not kept pace with OASIS development, and workflow will change with implementation of the new system. The markup guidelines in particular need restructuring, to separate out style from substance, and to provide more guidance on recommended level of markup to give a greater consistency to retrieval. New software packages need to be investigated, as the new OASIS will be XML, rather than SGML, based.

**Attachment:** OASIS Functional Requirements Outline

*Submitted July 7, 2003*