OASI S ANNUAL REPORT, 2003-2004

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

Overview A publicly available Harvard catalog since July 1998, OASI S 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 OASI S remains 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. The OASI S Steering Committee meets every other month, alternating with the OASI S Users Group, which also meets every other month.

OASI S began with seven participating repositories; this year, membership reached 18 (up from 16 last year), with the addition of the Radcliffe Institute Archives and Tozzer Library. The Harvard University Art Museums, Ukrainian Research Institute, Milman Parry Collection of Oral Literature archive, and Harvard-Yenching Library (Rickens Collection) have all expressed interest in contributing finding aids in the near future, the latter two for LDI projects; Baker Library and the Environmental Science and Public Policy Archive are in the process of recertification.

As of July 1, OASI S included 2,255 finding aids (185 MB total file size), up from 1,686 (140 MB) in June 2003. A survey by the Research Libraries Group in January 2004, tabulating finding aids by institution in RLGs Archival Resources, found Harvard substantially in the lead of its peer institutions, more than 700 ahead of Cornell, and 900 ahead of Berkeley.
Development in 2003-2004

System Implementation (ULC 2003 Priority #3). While the OASIS System Implementation Working Group completed drafting functional requirements in June 2003, little happened on this front this year as VIA implementation continued to absorb OASIS resources. Work on redesigning the OASIS user interface began in June 2004, with the Working Group reconvening to work with Roz Ault, the designer who did the new VIA user interface. Much functionality in both systems is parallel, and it has been our goal to make the user interfaces as similar as is practicable, to make it easier to move between systems. Prototype home page, search screen, and results sets pages are in place, with only minor styling still to be done.

Work on the “back end” of OASIS began in mid-June. The new OASIS catalog will be XML (not SGML) based. TED, a generic catalog for XML-based information (used for BIL and VIA) will provide the search and maintenance interfaces. While initial plans called for Taniulo to provide data storage, tests have shown that the EAD schema is of such complexity that performance time in Taniulo is not acceptable. It now appears that Oracle will be used to store the finding aids, with Oracle Text as the indexing and search engine. A target date for the release of the new OASIS has not yet been set.

EAD workshops. Training workshops, taught by Susan von Salis of HUM and Kim Brookes of Simmons College, have been offered twelve times since 1998, and are on a twice-yearly schedule administered by OASIS. This year, 17 individuals were trained, bringing the total to date to 155. 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 Abest practice for OASIS participants. The only formal "vetting" of finding aids comes at the point of application for OASIS participation, when the Standards Committee closely scrutinizes this first finding aid, and then hopes that the standard will remain at that initial level. Last year, OASIS changed its accreditation policy, switching from a repository-based system to individual-at-repository approval. As several repositories had lost their original OASIS liaison, these were contacted and the new procedures explained. Baker is very close to recertification; Environmental Science and Public Policy Archive had begun the process, but then lost its project archivist funding, leaving several finding aids that need corrections and additions.

It had been planned to use error reports (generated when a repository submits an invalid EAD instance) as a way of overall monitoring of the system. The delay in implementation has also delayed such reporting, but once possible, it is planned that these reports 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.

Project finding aids. The LDI grants program has created a situation where collections or repositories not normally in the finding aid creation business need or want to have project finding aids in OASIS. This year, two projects fell into this category: the Milman Parry Collection (which wants a finding aid in addition to its TED database), and the Pickens project at Harvard-Yenching Library. Both projects are under the auspices of the Harvard College Library, and the Steering Committee met with Maggie Hale, HCL's Digital Projects Librarian, to discuss them. Short-term solutions were agreed upon: the Parry finding aid, largely a mapping and linking project, will be handled by Hale and Sue Kriegsmann (OIS), working with Sarah Adams of Loeb Music as OASIS "buddy", and the Pickens project finding aid will be sent to a Houghton-approved vendor for conversion.

Yet the long-term concern remains: who will take responsibility for such finding aids? OASIS participants are required to commit to the archiving and
maintaining of these documents, and the Steering Committee would like assurance that the commitment is real rather than pro-forma. Investigation and discussion will continue.

**OASIS Users Group.** This year, the OASIS Liaisons Group was expanded to include anyone interested in OASIS, whether as a participant or as a user, with announcements and agendas distributed on HULINFO simultaneously, an OASIS-USERS list was established. Traffic on the list has been very light; attendance at meetings has expanded slightly, but is still predominantly OASIS practitioners.

**Retrospective conversion projects.** Schl esinger Library completed its LDI-funded retrospective conversion project, exceeding its original goal of 191 finding aids and converting 235 finding aids (3730 pages). Houghton’s project continues, with more than 1,200 converted. The growth of the database continues to strain the capabilities of the current search engine and user interface, with more searches resulting in an unmanageable number of hits.

**Steering Committee priorities for the coming year**

**Reimplementation of OASIS** If the new OASIS is to be ready for 1995, much work will need to be done in the summer and 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** While some progress was made this year with enlisting OASIS participants in helping update the site, the Support Site has not kept pace with OASIS development. Further, workflow will change with implementation of the new system and instructions on submitting finding aids will change. On the other hand, certain sections on using the DRS and NRS will no longer be needed, as these functions are to be folded into OASIS itself.
The Harvard 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.

Submitted July 9, 2004