

# Digital archive and online systems management overview: 22 August 2017

The bespoke nature of the new online system has many advantages (cost effectiveness, flexibility, ability to respond to new requirements, etc.). However, unlike off the peg Archive Management systems it does not come with pre-defined protocols and risk management procedures that simply need to be learnt and followed. A bespoke system requires a much more proactive and collaborative decision making process in terms of set up, configuration, and management.

Currently, the two major digital assets are the website (hosted on Krystal) and the interview archive (hosted on Google drive). The website consists of Drupal files, interview files small enough to be hosted on the server, and a database that contains Drupal configurations and all website content. Interview data and metadata held in the website database can be exported as a csv at any time. The archive consists of digital files (interview recordings, photos, transcripts, log sheets and other documentation) and a csv file containing interview data and metadata, plus website backups.

The need for an affordable solution has meant that not all files can be hosted on the web server, and interview recordings need intermediate media servers to allow them to be viewed on the website. This means that the website cannot be considered the same as the digital archive on Google as it does not contain the most valuable files of all – the interviews themselves. Archive backups need to be taken from Google, not the website, and archive management is required to ensure that all files hosted and displayed on the website are in the Google archive. Files hosted on the website need to be transferred to Google by the website manager. All versions of the interview recordings need to be uploaded directly by the interviewer. For security purposes, there may also be other information that it is considered appropriate to store on Google, and not on the website.

The archive needs to be cared for and managed in very similar ways to the physical archive. Interviewers are only able to upload interviews (and any other information) to [archive@historyproject.org.uk](mailto:archive@historyproject.org.uk). These files then need to be transferred to the main archive on [admin@historyproject.org.uk](mailto:admin@historyproject.org.uk) and properly filed by an Archive Manager/small Archive Management Team.

The diagram on page 2 provides an overview of the system. Discussion is needed about the fine details of this process, and it would be very useful if those with archive management knowledge could start this process by questioning current arrangements from an archive management perspective.

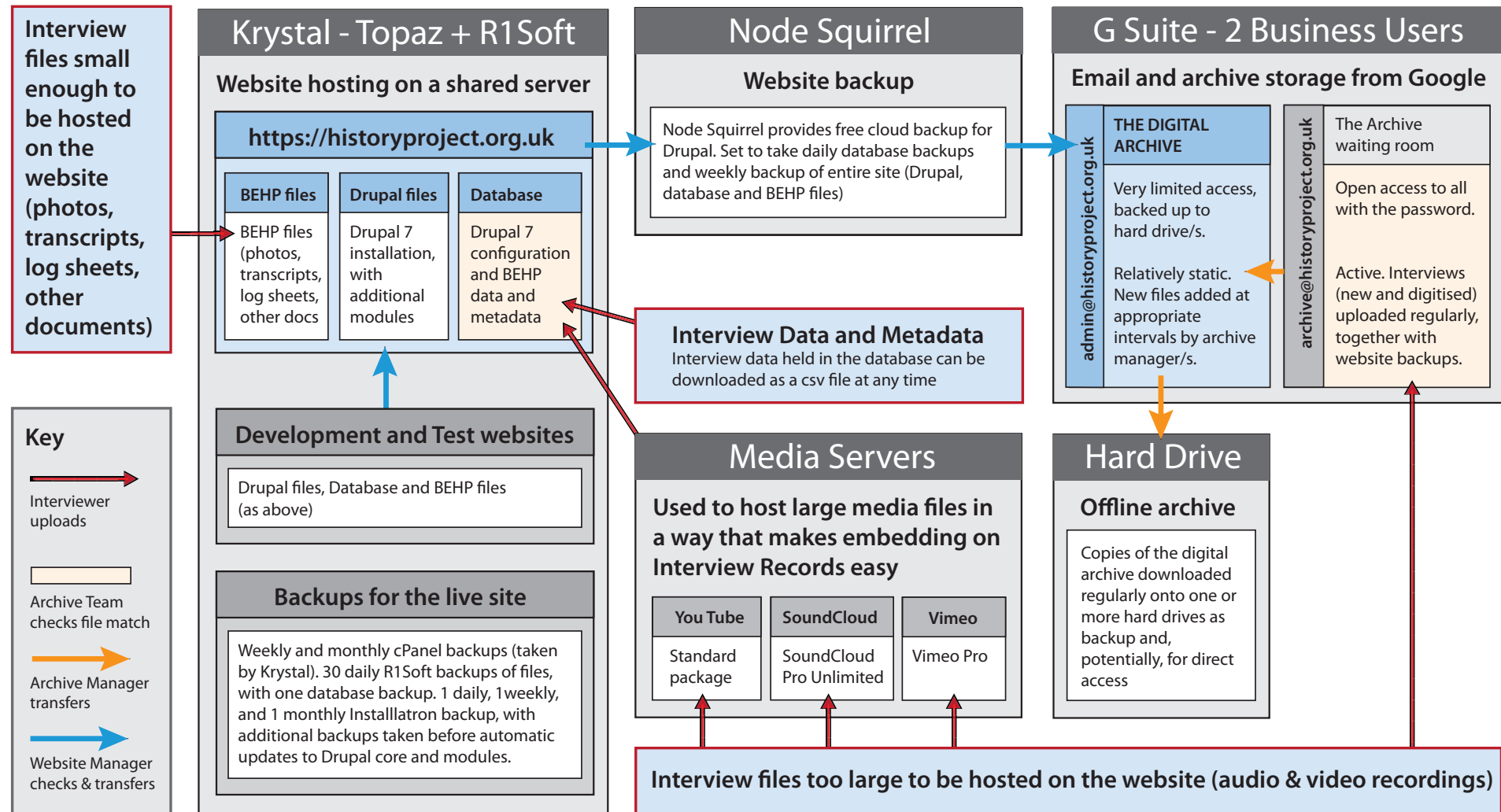
## Online systems

The table on page 3 outlines some of the issues. It will certainly not be possible to address all within one meeting, and the most important thing will be to agree a way forward.

It is proposed that a list of priorities is agreed, that issue based work groups are set up accordingly, and that a group leader is identified for each. It is also proposed that work groups meet on a regular basis via Skype (with digital development work, a frequent short meeting is much more useful than a longer less frequent meeting) and that the nominated group leader takes responsibility for maintaining an Action Record on the website. In addition to making the development process easier (by keeping all related discussions in one place), the Action Record will provide an up to date report of decisions in progress for all members of the Management Team, and an audit trail.

In relation to this proposal, a new 'Actions' section has been set up on the website. It would be useful to demonstrate how this would work, discuss amendments and agree use (it can be renamed/reconfigured as appropriate) – or discuss and agree an alternative approach.

# Online systems overview



## What needs to be managed?

	Assets	Online	Management/Risk Management
<b>The BEHP as an organisation</b>	Legal status	Terms & conditions, cookies, interview paperwork (including release forms). What else should be considered?	Proper procedures taking current and imminent new legislation into account need to be agreed. Terms & conditions for use of online systems (primarily, but not solely the website) need to be reviewed.
	Interviews	The digital archive	(See Interviews below)
	The website	Development, test and live sites + backups	Website development and backup procedures need to be agreed.
	Members	To be discussed 22 August	
	Volunteers	Permission to edit database	Volunteer agreement and agreed management procedures needed.
	Correspondence	Emails	Management and audit trail needs consideration (three options: webmail, set up in desktop email client, or cc all emails and all replies to BEHP email address).
	Meeting agendas and minutes	In Google archive. Now also on website.	Access to main Google Drive archive needs to be limited for security, but meeting records can be kept on the website with access limited as appropriate. Upload can be to Google with link embedded on the website or to the website with automated copying to Google.
	Professional contacts and Partners	Meetings and actions with contacts and partners can be recorded on the website.	Process needs consideration.
	History, longevity and reputation	(See public profile below)	
<b>Public Profile</b>	Excellent network of contacts Credibility at a national level	The website has Blogs (which can be published by any Registered User), Articles and News pages. There are Facebook and Twitter accounts.	Is this right? What are most important in terms of building profile? Policy for Blogs needs to be outlined in the Terms & Conditions for Registered Users, including the right to delete any material that breaches agreed conditions. Editorial and Social Media policies are needed for the remainder.
<b>Interviews</b>	Physical recordings	To be discussed 22 August	
	Interview paperwork (hard copies)	Should this be uploaded as PDFs, copied into fields in the Database or kept offline?	Consideration needs to be given to data protection issues. Who monitors?
	Photos and other documentation	Should all documentation be uploaded?	As above.
	The digital archive (including recordings, data and metadata)	Main archive is on Google. It is accessible through the website, with Vimeo and SoundCloud used as media servers.	Procedures need to be agreed, including new interview procedures, volunteer agreements, etc. Who monitors?