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Dieter Schlenker¹

DIGITAL TRANSFORMATION AT THE HISTORICAL ARCHIVES OF THE EUROPEAN UNION - FROM INDIVIDUAL PROJECTS TO SYSTEMATIC DIGITISATION

Abstract

In the 2015 amendment of the EU Archives Regulation 354/83 of 1983 on the opening of EU institutional archives to the public, the EU took an important step forward towards modernisation of its archival services, by introducing a new and systematic archival digitisation policy. Since then, all EU institutional archives, prior to their opening to the public after 30 years, are systematically digitised and made available to the public in digital format. This new digital focus of EU institutions corresponds to the general digital agenda of the EU, in this case as regards the cultural heritage sector. The digitisation policy has since then been embedded in the institutions' yearly work programming and budgeting following a formal policy approach. The new digitisation policy poses the traditional dilemma between conservation and communication of fragile archival heritage objects and gives an answer in a new way, pending between the danger of hypermnesia on the one hand, and transparency and enhanced research opportunities on the other. The digitisation policy requires a new evaluation of the main questions of archives on conservation, retention, documentation and valorisation.

Key words: digitization, archival records, European Union

1 INTRODUCTION

In 1983, the institutions of the European Communities, now the European Union, decided to open their archives to the public. One year later, the European Commission signed an agreement with the European University Institute in Florence to establish the Historical Archives of the European Union (HAEU) at the Institute.

Since 1986, the year this Archives opened its doors, it has received yearly file transfers according to the 30 years closure rule for EU historical archives. These files are selected, treated, described, and prepared for long-term preservation by the producing institution in view of their opening to the public. Under the principle of 'deposit' in Florence, ownership, and the main responsibility for the archival selection and treatment for these archives has remained with Archives Services established for this purpose in each of the producing institutions.

Based on Council Regulation 354/83, the Archives have become a specialised and centralised archives centre on the history of the European Union and its institutions, and generally of European integration. Its mission is, therefore, to collect, preserve and make accessible the historical archives of EU institutions, bodies and agencies, and to collect papers of individual actors and organisations that have contributed to a united Europe. Through the opening of the institutional archives, the HAEU raises the transparency of EU institutions and promotes research on European integration using primary archival sources.

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The contract of 1984 was replaced in 2011 by a Framework Partnership between the Commission and the EUI, which emphasised, for the first time, digital access to the archives. Then, in March 2015, the original Regulation of 1983 was amended and the new Council Regulation (EU) 2015/496 revised not only the financial and legal framework of the Archives but redefined its mission in response to the new digital information society:

“(11) The institutions and EUI should, where possible, make the historical archives available to the public in digitised and digital form, so as to facilitate their consultation on the internet.” (cit. Regulation 2015/496, preface)

The amended Regulation prioritises digital access and obliges the institutions to deposit the original documents accompanied by digital copies for consultation. Only the Court of Justice and the European Central Bank continue to deposit their archives in Florence on a voluntary basis.

2 THE DIGITISATION OF ARCHIVES

Traditionally, archival documents were available for consultation only on-site, in a dedicated reading room. On request, and rather exceptionally, users could obtain copies of certain documents or single pages of documents of particular relevance; these requests added costs for production and dispatch via mail.

Only with the arrival of the digital era and the internet as a network for information sharing, however, did the system for the production and sharing of copies of original archives change. Different methods for the online consultation of documents evolved without the need to physically consult these papers in an archival reading room (Dryden, 2014, p.65).

“Providing access and preserving the archival material for future generations are part of the archival institutions’ mandate. Currently, the new technologies offer many possibilities to them in order to support these goals. Digitization is one of these possibilities and through it, archival institutions can create virtual reading rooms, making their material available online, and enhancing access vial local networks and/or through the Internet, especially for users that cannot physically visit their premises.” (cit. Bountouri, 2017, p.29).

While the possibilities of new digitisation tools seem without limits, archival institutions must bear in mind various risks and challenges as regards the access to and preservation of digitised copies of original archives. The European Commission on Preservation and Access (ECPA) recognised the fascination of the broad range of opportunities on the one hand, but also saw risks, in particular on the long-term preservation of the digital copies placed on unstable media (Weber & Dörr, 1997, preface).

The Archives have accepted the new digital tools to serve the following objectives: better preservation; increased access to archival holdings; and the possibility to take advantage of public and private financing opportunities for digitisation projects in the area of cultural heritage (Moss & Currall, 2004, p.124-126).

Copying archival material to improve the preservation conditions of the original is a long-standing practice in the Archives, since well before the digital age. At the same time, digital copying is certainly not the best method for preservation, due to the short lifespan of digital media in time. Nevertheless, it is often used as justification to launch digitisation campaigns of originals whose preservation status is considered at risk. This argument has been particularly successful when coupled with the fact that digital copying allows for online access to the copied materials, thus eliminating the need for travel and costly archival consultation visits (Kemp, 2015, p.57).

The other argument supporting digital copying is the extension of access to information and knowledge through holdings made available online, 24 hours a day, seven days a

week. These documents are also accessible to more than just one researcher or educator at the same time, and can be searched and retrieved using search engine technology. This raises the issue of the need for professional archival description, a sound metadata policy and the systematic publication of inventories online.

Finally, the online holdings also promote the public image of archival institutions. Digitisation activities become part of the regular activities of Archives, for which they may obtain public and private financing, human resources and technical equipment (Borghi & Karapapa, 2013, p.11-13).

Relevant actors consider digitisation to be not only a better way of managing information, but also of managing cultural heritage in general. In 2010, and in reaction to various massive digitisation projects, such as the Google Books initiative in 2005 and the World Digital Library of UNESCO, the EU established a European expert group on digital innovation, tasked with determining how to better represent cultural heritage online. The report "New Renaissance" gave a series of recommendations, establishing the new platform *Europeana* as the digital reference point for European cultural heritage, and promoting private and public investments in the digitisation of cultural heritage (Purday, 2012, p.2-4 and Bideran, 2017, p.143). *Europeana* was conceived of as a cross-cultural and multilingual digital access point to the collections of museums, libraries and archives in Europe. Its aim is to regroup digital memory, improve its accessibility and promote the visibility of the cultural institutions therein (Borghi & Karapapa, 2013, p.1-4, and Hacken, 2013, p.309).

Archival institutions participate in digital strategies even though they were reticent in the beginning, concerned with potentially shrinking numbers of visitors in their reading rooms. On the positive side, going online has created a new link between cultural institutions and the digital world, redefined and created new points of contact with the public, and stimulated the development of new communication strategies (Schafer, 2011, p.102). Another benefit has been the democratisation of access to people beyond individuals with the possibility to consult items physically in reading rooms. The collectively shared memory across institutions raised the sense for responsibility and adherence amongst the broad public (Schönherr-Mann, 2014, p.16-24). The connection between the document, its description, and the algorithms for search and retrieval creates a structure for a short moment. Of course, while the access to documents is more democratic, there are limits due to the massive amounts of information and the ever changing structures and hierarchies of their presentation (Faßler, 2014, p.31-32).

Another issue to consider is that, in the growing mass of documents online, the role and distinction of the institutions of provenance become more and more unclear. If everything is online, it is no longer important for the user where the original is located. This gives space to new types of organisations: digital memory institutions, for example, aim at raising digital access to and the visibility of specific thematic or chronological holdings, which are not their own (Kirchhoff, 2008, p.251-255).

Various such platforms have been construed in the past years on national or regional levels in Europe. On the European level, the most important initiative is the Archives Portal APE, which promotes archival holdings from local, regional, national to international institutions under one European roof (Kirchhoff, 2008, p.263).

Finally, another common issue in larger archival digitisation projects and in particular the online availability of digitised holdings is the question of copyright. Large-scale digitisation projects cannot guarantee a document-by-document control as regards the copyright of the material contained. Archives, therefore, often apply a risk management approach looking at factors such as the date of the material and what is known on the property of rights, the market value and in consequence the probability of litigation (Dryden, 2014, p.67-81).

3 THE DIGITISATION OF THE EU HISTORICAL ARCHIVES

With the establishment of the Historical Archives of the European Union at the European University Institute in Florence in 1984, the EC/EU had decided not to create a central historical archives service with an institution, but to deposit their archives in an academic institute with the status of international organisation. The 1983 Regulation already obliged the institutions to prepare microfiche copies of original documents for consultation purposes:

“The historical archives shall be accessible in copy form. However, the institutions may release the originals of the documents or records if the user shows a special and duly substantiated interest.” (cit. Regulation 354/83, article 1.5)

Our Archives' practice of creating copies was a response to different needs. The first was to provide internal research opportunities to EU officials once the files were physically transferred to Florence. The second reason was that each institution reserved the right in the Regulation to provide research services for their own holdings to external users in a dedicated reading room. A final point was the security aspect, in that having copies could be useful in case of the loss or degradation of the originals.

In addition, the Archives in Florence had started to digitise selected private papers on the basis of their specific preservation conditions or how much they were in demand for consultation. In some cases, depositors specifically requested receiving a digital copy of their archives. In 2008, the HAEU started the digitisation of its first private holding, the private papers of Alcide De Gasperi, the first Italian prime minister after World War II.

The experience of the HAEU, along with those of a growing number of digitisation projects in archival institutions over the globe since the mid-2000s led EU institutions to reflect on a more systematic approach towards digitisation. With the amended Regulation of 2015, the EU institutions took a much more ambitious decision to digitise completely and systematically all documents, prior to their shipment to Florence and their opening to the public. This was a new approach that entailed massive digitisation of historical archives for online access.

“Wherever possible, the institutions shall make their archives available to the public by electronic means, including digitised and born-digital archives, and facilitate their consultation on the internet.” (cit. Regulation 2015/496, article 9.1)

The central and single role of the HAEU is to ensure the most complete and efficient access to the historical documents of all institutions, with inventories and other finding aids available online in digital format. The digitisation activities of the institutions and those of the HAEU concerning private archives are complementary. The Inter-Institutional Archives Group (IIAG) serves for exchange on holdings being digitised and for cooperation to ensure that partners in the group follow similar standards and techniques, respecting data protection and other applicable rules.²

In its annual work programme, the Archives in Florence outlines the holdings it plans to digitise and receives consultation copies or access to these copies hosted by the European institutions, in order to make the copies accessible to the public. The access to the original is limited to exceptional and justified needs, such as exhibitions.

2 Regulation (EC) 1049/2001 on public access to documents <<https://eur-lex.europa.eu/eli/reg/2001/1049/oj>>, Regulation (EC) No 45/2001 on data protection, <<https://eur-lex.europa.eu/eli/reg/2001/45/oj>>, the GDPR Regulation (EU) 2016/679 <<https://eur-lex.europa.eu/eli/reg/2016/679/oj>>, and finally Regulation (EU) 2018/1725 on data protection by EU institutions <<https://eur-lex.europa.eu/eli/reg/2018/1725/oj>>.

4 TOWARDS THE DIGITAL FUTURE

Digitisation moves the document, its content, structure, context, medium and format from a rather stable support to a highly sophisticated digital environment. The digital sphere is, by its nature, contrary to the idea of the longest possible preservation in the best conditions. The principle of the inseparable relation between information and support that held true for centuries has grown obsolete with reformatting through digitisation (Chun, 2011, p.18-19, Weber, 2008, p.26). That is why the solutions for information security, access, readability, reliable storage and interoperability need to receive major attention when digitising archives (Regimbeau, 2015, p.5-9).

With the "shift from boutique to bulk digitization" (cit. Miller, 2013, p.522), the expectations towards archives have grown immensely, on the side of the depositors and on the side of the public that requests full availability of collections online. The selection of archives and the justification to digitise will need continued attention: digitisation is never the final objective, but rather the means to a predefined end, driven by stated goals of a digitisation project (Weber, 2008, p.30-32, Moss & Currall, 2004, p.127).

With digitisation, researchers contact Archives less and less when looking for documents; they instead expect to find the document directly online. The Archives, therefore, must be pro-active and present on the internet in order to guide and assist the users in the new digital environment. Its methods will continue to be the appraisal, selection and description of fonds. While metadata, controlled vocabularies and thesauri are work-intensive to produce, they continue to be the guides towards archival documents, and are also so for search engine technology, ranking and faceting (Trinkaus-Randall, 2013, p.16, Moss & Currall, 2004, p.129-131).

In the digital world, the role of the archivist moves from the guardian of cultural heritage to promotor and facilitator of transparent and democratic access (Weber, 2008, p.26). The ongoing COVID pandemic has further pushed the Archives towards the digital sphere. Users who can not reach the reading rooms physically call for the online availability of documents. In response, the Historical Archives of the European Union has therefore launched its new "Digitisation on Demand" service.

This new service, which allowed researchers to continue with their research projects even under the strictest COVID restrictions, has been extremely well received by users. While it has meant significant additional work for the HAEU staff, and requires additional technical resources, the introduction has been smooth and successful.

With the EU's 30-years closure rule for archival documents, the HAEU has recently started to prepare for the digital-born archival environment by implementing a digital long-term preservation system. In the first phase, the ingest into the system concerns mainly digital copies of paper archives and of audio-visual materials, however, the first purely digital archives have been deposited. These open yet another chapter in the voyage of the Historical Archives of the European Union towards the preservation of and access to digital-born archives.

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Magdalena Marosz¹

FAMILY ARCHIVES OF INDEPENDENCE PROJECT – A MUTUAL LINK BETWEEN ARCHIVE AND USER

Abstract

The project 'Family Archives of Independence' encompasses the whole of Poland and addresses everyone for whom domestic collections of documents, sometimes having grown over many generations, are of incalculable personal value. There are many family archives which have the potential to evoke great emotion and create a social history more colourful than that of textbooks, however such collections are still not as yet widely appreciated.

The aim of the project 'Family Archives of Independence' is to combine national and private history and highlight the role of yet anonymous people, families or the local communities in the restoration of independent Poland in 1918.

All those who cultivate memories of their predecessors and wish to seek professional advice on how to care for their archives are encouraged to participate in the project and archivists from 33 state archives in Poland offer their help by sharing their knowledge and experience.

Such cooperation is a good example of the connection between archives and their users, including those who have never used archives before. Contemporary habits, resulting from technological development, are also helpful in the preservation of the content of home archives in digital form with the option of making them widely available on the Internet. This is of mutual benefit for both sides, but also for a wider audience, who have the chance to appreciate very interesting, sometimes unique, materials concerning the history of the nation or local community.

Key words: local history, home archives, archival exhibitions, digitalization.

1 INTRODUCTION

Calculating from the first partition, in 1918 Poland regained independence after 146 years, or after 123 years, from the third. The partitions are the period (from 1772 to 1795) within the history of the Polish-Lithuanian Commonwealth (that is Poland and Lithuania united by a union) when neighbouring states: Russia, Prussia, and Austria divided the lands of the Commonwealth between themselves. As a result, Poland disappeared from the map of Europe for one hundred and some dozen years.

The 11th November 1918 is recognised in Poland as the date of regaining independence, in remembrance of which, National Independence Day is celebrated. The holiday, established by the law of April 23, 1937, abolished by the communist authorities in 1945, was re-established after Poland regained sovereignty in 1989. Of course, the regaining of independence by Poland was a gradual process, lasting many months. The choice of this specific date was dictated by a coincidence of events perceived as directly relating to the regaining of independence: on the 11th November 1918, an armistice was concluded in Compiègne, finally ending World War I hostilities, plus on the day before this Józef Piłsudski, previously imprisoned by the Germans in Magdeburg, arrived in War-

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saw. Piłsudski was an icon of the fight for independence and in time became recognized as one of the fathers of the independent homeland.

2018 was the centenary of Poland regaining independence and was celebrated with many events and projects. One of these was the project 'Family Archives of Independence', organised by the Office of the Head Director of National Archives, in cooperation with local archives. At each of the archives, a consultation point was set up where information could be obtained on how to run a family archive, how to develop and protect it and also how to create digital copies. Within the framework of the project, exhibitions were held, however at present, due to the pandemic situation, only virtual projects have been realised. Along with the online presence, there are also other activities promoting the project, among others a project called 'Become a Family Archivist'.

2 THE FAMILY ARCHIVES OF INDEPENDENCE

2.1 ASSUMPTIONS OF THE PROJECT

Naturally, the project's main focus are the events connected with the regaining of independence in 1918, the centenary of which has prompted an emblematic résumé. However, it was decided at the very beginning that the project ought not be confined to the events of November 1918, and its subsequent years, since the statehood regained then was also built by subsequent generations. Therefore, the wider aim of the project intends to uncover the broader relationship between the history of the nation and the histories of particular families and individuals. A further concern was also (perhaps most importantly) to explore the roles played by the great number of private citizens within a community and not the figures from the front pages, who made a more visible contribution to these events.

Everyone in possession of materials from this time: documents, photos, films, or recordings, has been encouraged to participate in the project; both those who have long forgotten their valuable possessions, and those who cultivate the memory of their predecessors. The project organisers also offer expert advice on how to take care and preserve family souvenirs for future generations.

Fifty nine consultation points have been set up throughout the national archives and their local branches, and are run by experienced archivists, sometimes with the help of archival conservators, providing all information regarding the organization and management of a family archive, its proper storage and protection of files, as well as advising on the making of digital copies.

Digitalisation and online sharing of materials from family archives is one of the main objectives of the project. Virtual exhibitions are created and presented both on the project's home page and the home pages of particular national archives engaged in the project. („Archiwa Rodzinne Niepodległej", 2018).

2.2 A POLAND-WIDE EXHIBITION 'FAMILY ARCHIVES OF INDEPENDENCE. A COLLECTIVE PORTRAIT OF FAMILIES WITHIN THE SECOND POLISH REPUBLIC.'

The exhibition, organised within the framework of the project 'Family Archives of Independence', has successfully achieved its main goal, namely the sensitising of people to the unique value of family remembrances, while concurrently encouraging them to actively celebrate the centenary of the regaining of independence by Poland.

Between the 2018-2020, many priceless historical materials were donated to the national archives from all over Poland. They are being sequentially digitalised, and copies placed on the website: archiwarodzinne.gov.pl. A substantial part of the collections obtained in this way are photographs that uniquely document the life of Polish families from the end of the 19th century to modern times.

These unique materials, showing extraordinary moments and everyday life during the Second Polish Republic (1918-1939), were presented at the open air exhibition 'Family Archives of Independence. A collective portrait of families within the Second Polish Republic' from the 3rd November 2020 to the 20th January 2021 in Warsaw.

The exhibition comprised five main thematic sections, presenting: a national and religious cross-section and multiculturalism within the Republic; diversity of social status (from peasant families to aristocracy); participation in regaining the independent state and in the fight for its borders; everyday life; the role of women in the reborn state. The exhibition was created solely on the basis of abundant materials from family collections donated to the resources of national archives from all over Poland. („Ogólnopolska wystawa”, 2020).

2.3 COLLECTIONS

As of 12.02.2020 the project website has accumulated 56 so-called collections. A 'collection' is comprised of scans of archival materials from a single family archive, concerning either the family as a whole or one of its members particularly. We can find here photographs (being of most interest to the general public) and also official documents, correspondence, membership cards, identity cards, diplomas, and many other documents from the end of the 19th century to the second half of the 20th century. The documents are accompanied by descriptions which present the history of a family or a specific person; all scans have been captioned. Individual collections differ in size, and the proportion of archival material to its description also vary, but each collection undoubtedly presents a really interesting and meaningful history. The collections are made available by particular state archives which received original archival materials or their scans donated by individual families. Certainly, the collection will continue to grow throughout the duration of the project. („Kolekcje”, 2018-2021).

2.4 LOCAL EXHIBITIONS

In 2020, within the framework of the project 'Family Archives of Independence', national archives all over Poland organized exhibitions presenting family collections donated to their archival resources and thus included in the national archival collection. All the exhibitions were available to be visited in real for a set period of time, while they are also available at all times online. Twenty-one such exhibitions were prepared by the archives. Their subject matter is diverse: they present the histories of individuals, of families, social or professional groups, inhabitants of a given town or village, as well as most interesting individual documents. All exhibitions focus on issues related to the regaining of independence by Poland, the shaping of the borders and structures of state, some documents dating even up to World War II. They try to present the history of individual families or people against the background of Polish history. („Archiwa Rodzinne Niepodległej - wystawy lokalne”, 2020).

3 HOME ARCHIVE

3.1 BECOMING A FAMILY ARCHIVIST: A GUIDE

Along with the implementation of the project, a special guide was prepared for all those who showed interest in preserving their family archives in the best possible way. 'Each of us can become a guardian of a family history', write its authors, explaining that the guide is intended both for those who already have their own family archives and those who would like to create one.

Using the guide, we can find out how to professionally take care of the documents that have already been collected in the family archive, as well as of those that will only get there in the future. The authors of the guide give advice on how to arrange the collected

archival materials and how to properly catalogue them. They advise on how to safely perform basic conservation and how to correctly digitalise files.

The information presented in the guide is divided into categories describing the handling of the particular types of materials that can be found in the family archive. Thus, four sections were created, entitled: 1. The Family Archives of Independence - introduction. How to use the guide. How to start taking care of a family archive. 2. Family Archives of Independence - documents (manuscripts, typescripts, posters) 3. Family Archives of Independence - photos 4. Family Archives of Independence - mementos. Each of the above-mentioned parts of the guide has been prepared as a PDF file, and can easily be printed or downloaded and used on a computer at any time. („Domowe archiwum”, 2019).

The preparation and sharing of the guide is designed additionally to encourage people to take care of and save artefacts of the past gathered in houses, sometimes forgotten and thus perhaps doomed to destruction over time. However the basic argument in appealing to a larger audience, encouraging interest in family archives relating to the history of Poland was the possibility of presenting them to the general public on the project website and on the websites of individual national archives or at traditional exhibitions.

3.2 COMPETITION ‘HISTORIES FROM FAMILY ARCHIVES’

In 2020, a competition was launched where participants were invited to present the history of their families, intertwined with the history of the homeland being reborn. The participants in the competition were to describe and document their family history basing upon, among other things, family members' accounts, documents, photos, and souvenirs kept in the home archive, the history of the region and the history of the family in historical context plus a focus was set on literature and archival query.

The entry work could be submitted in the form of manuscript, printout, text file of a size not less than 15 pages, or as a film of a minimum of half an hour's length. The authors could supplement their works with, for example, photos, maps, illustrations, a family tree, fragments of diaries, recordings.

The aim of the 'Histories from family archives' competition was to focus attention on cultivating memory and tradition, respect for the past, shaping patriotic attitudes, education and increasing the sense of national identity of the society as well as arousing interest in the culture and history of 'small homelands': of the region and local communities. The works created for the competition were intended to preserve and propagate the testimonies of 'little history' set against the background of historical events. („Konkurs”, 2020).

It is important to mention that the competition was directed both to adults and children alike, so that, apart from the patriotic dimension, it also pursued an educational goal. Seventy-seven entry works were submitted, and the winners were selected in two categories: 'adults' and 'under 18'. („Wyniki konkursu”, 2020).

4 BUILDING OF THE ARCHIVE – USER RELATIONSHIP

One of the aims of the project 'Family Archives of Independence' was to draw the public's attention to the unique value of family souvenirs in relation to historical events. Documents and other materials kept in homes are an exceptional testimony of the history of individuals, families and local communities. Within the framework of the project, state archives have encouraged people to appropriately care for these invaluable items and to deepen their knowledge about the roots and the history of their predecessors.

At the same time, the owners are encouraged to digitalise these materials and transfer their copies to archives. The originals remain in the family archives, while their digital copies are stored as separate collections in national archives and through them made available to the general public. In this way a kind of special relationship is created between the institution of the archive and the private owner of archival documents. Furthermore, making digital copies not only additionally secures the information contained in files, but also gives them a new life, in a space and dimension completely different than before.

Thanks to the project, a new possibility of obtaining documents has opened up for the archives. Up to now, documents in electronic form (originals or digital copies of documents in traditional form) have been transferred to the archives mainly from public institutions as documents created or collected in the course of the activities of these institutions, and also from non-public institutions or as the legacy of private individuals. The archives have also collected scans of materials which supplement particular collections of a given archive, but which are stored in other institutions. The electronic documentation collected by all national archives from public institutions, that is the most frequently appropriated, is to be finally stored at the emerging Electronic Document Archive (ADE – Archiwum Dokumentów Elektronicznych). Its creation is connected with the necessity to take over an increasing amount of documentation created in electronic form, especially as institutions use electronic documentation management systems. ADE is to ensure the possibility of permanent, safe storage of this documentation, ensuring its integrity and authenticity. Unfortunately, the rules for sharing archival materials in electronic form have not as yet been discussed and agreed upon. This concerns both the documents which are already included in the resources of individual national archives and those to be acquired in the future by ADE. In the latter case, it is intended that users will be able to use special functions within the system, enabling searching, ordering, and downloading of archival materials transferred to national archives in electronic form. (Czerniak, Orszulak, 2017, pp. 73-77).

Up until now, the collecting and sharing of documents, photos, recordings and films related to specific events, people, or places, whether original documents or digital copies, has been mainly the domain of so-called social archives, created through the social activities of grassroots foundations, associations, local government or just a group of people. Social archives collect various types of documentation, the vast majority collect photos and also keep personal documents, iconographic materials, and documentation of social life. They obtain archival materials in various ways and collect them from various angles, depending on the basic purpose of the institution organizing a given social archive. (Ziętał, 2015).

Social archives play a very important role in the safeguarding archival materials kept by private individuals and institutions. Certainly, thanks to them, a significant part of these materials will be preserved for future generations because their owners have been made aware of the significance and historical value of the materials in their possession.

The project 'Family Archives of Independence' assigned similar tasks to the national archives. By encouraging people to search for family souvenirs, offering help in the field of their proper analysis and protection of files, national archives are trying to encourage the creation of family archives, thanks to which it will certainly be possible not only to preserve many historical sources but also share their digital copies with a wide audience via the Internet. The possibility of obtaining comprehensive information and practical help is an incentive for closer cooperation with the archive, convincing the materials' owners to transfer scans of family souvenirs, and sometimes also the original materials to the national archive. It certainly serves to build in the public awareness the image of archives as open institutions, focused on helping and cooperating with anyone who wants to care for cultural heritage, even on the smallest scale.

5 SUMMARY

In 2020, in recognition of all the donors who have enriched the national archival resource by donating the originals or digital copies of their priceless collections to the network of nationwide archives, encouraging others to undertake such cooperation, the Head Director of National Archives announced the 6th December as Donor Day. In 2020, unfortunately, due to the epidemic, no special celebrations took place, but in the future, on this day, various events (such as meetings, conferences, exhibitions) will be held in the national archives to honour the present and future donors.

It should also be emphasized that it is thanks to the large group of donors – home archivists, that the implementation of the project 'Family Archives of Independence' was possible on such a large scale, despite the restrictions and difficulties common in 2020.

The project was directed primarily to amateur archivists, both those who had previously managed their family archives, and those sensitised by the project itself about the need to care for historical sources, including those on a smaller scale; to all those who remember their predecessors and care for their survival in memory and perhaps would like to do it even better. Therefore, great emphasis was placed on issues related to the protection and conservation of archival materials.

Within the framework of the project, archivists from many national archives conducted stationary workshops for small groups and on-line workshops and recorded crash course videos.

The project has not as yet finished, it will be continued until 2022. Summing up its functioning so far, it can be claimed that it is fitting well with the user-archive interaction and has already contributed to the development of many relationships, and possibly through future new initiatives, these relationships will still develop.

One could ask a question of who/what this type of project is intended for? Looking at its results, it appears that the answer immediately apparent: it serves both sides, exactly how has been set out above. But it is also worth paying attention an additional aspect, also extremely important in my opinion: such activities, projects undertaken by archives, are directed to the general public, that is people who often have nothing to do with the archives, and sometimes even have misconceptions about them. They are an excellent advertisement and promotion of archives as a public utility institution, at the same time helping to establish contact and cooperation with such an audience. They bring history closer – perhaps above all – local history, promote patriotism, teach the care for historical souvenirs, at the same time enabling the archives to obtain new archival materials that in many cases would probably not see the light of day or even be lost.

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AUTHENTICITY AND IDENTITY OF THE ELECTRONIC RECORD IN THE DIGITAL TRANSFORMATION OF ARCHIVES

Abstract

One of the key features of an electronic record is its authenticity. Ensuring the authenticity of management electronic records at all stages of its life cycle from the moment of creation to long-term storage allows us to remove obstacles in the digital transformation of archives. The authenticity of electronic records was the subject of research within the framework of the international project InterPARES. A record is considered authentic if its author, place and time of creation were definitely established, as well as the fact that this record really comes from the claimed author. To ensure this property of an electronic record, not only authentication and electronic signature procedures are required at the time of creation of the record, but also the creation of the so-called trusted environment, which is designed to ensure the preservation of records metadata due to controlled management procedures. The focus should be on the information system as a whole. This understanding of the authenticity of the electronic record was enshrined in international standards for information and documentation. In Russian practice, the concept of "authenticity" is used very rarely, and as applied to management electronic records, it is used mainly in the sense of identity to some source record. Such an understanding involves conducting comparison procedures with some reference record, which should remain unchanged. At the same time, in the electronic environment in which the functioning of electronic records takes place, it is practically impossible to ensure the safety of the records file (s) unchanged. Given the social nature of the record, we must understand that the immutability of an electronic record is a relative concept and concerns the preservation of the social function of the record. That is why we must allow only a relative recognition of the identity of electronic records, allow the possibility of some changes within which the electronic record retains its social functions. The difference between the copies of the electronic records within this difference allows us to talk about authentic records.

Keywords: *Electronic record, authentic record, identical record, terminology, long-term storage, archival storage.*

1 INTRODUCTION

For records, the creation, use and storage of which is carried out in the electronic environment of the information system, one of the most essential characteristics is authenticity. Authenticity is defined by us as a property of an electronic record that confirms the origin of this record, the author, the time and place of its creation. Authenticity is primarily associated with the procedures for officially certifying information about its origin, the presence of established rules for working with a record and the presence of a so-called trusted environment, the functioning of a record within which ensures the user's confidence in the information about the author, time and place of creation of the record contained in

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the record itself. The concept of "authenticity", of course, is primarily relevant for records used in management activities, and it can be applied equally to records on traditional media and electronic records. For electronic records, it is of particular importance due to the peculiarities of the technology for working with them (Surovtseva, 2020).

2 THE CONCEPT OF "AUTHENTICITY OF AN ELECTRONIC RECORD"

A study conducted by a group of specialists within the framework of the second InterPARES project was devoted to the issue of the authenticity of electronic records. In the context of expanding the scope and use of electronic records, it is the ability to ensure authenticity that has become the main parameter for the development of electronic records management in the context of electronic government. The starting points in this study were the concepts of "authentic record" and "authentic copy". A record was deemed to be authentic if its creator or author was definitely established, as established and that this record really comes from the claimed author. The property of authenticity is assigned to a record on the basis of its form (form of the record), the context of its creation, the mode of transmission of the record and the method of its storage and preservation. All this information should be included in the metadata.

Within the framework of the InterPARES project, case studies were carried out to ensure the authenticity of electronic records on the example of several projects implemented in the field of public administration of a number of foreign countries (USA, Canada, Ireland, Singapore, Germany, etc.), the reports on which helped to form general approaches to solving this task. It should be noted that initially ensuring the authenticity of an electronic record was reduced mainly to the procedure for authenticating its author or creator and using electronic signature means when transferring a record from one information system to another. However, as a result of the conducted research, an understanding of the insufficiency of these solutions came. The focus should be on the information system as a whole, the reliability of which is designed to ensure the preservation of record metadata, primarily through controlled management procedures. This makes it possible to ensure the authenticity of an electronic record throughout its life cycle, from the moment of creation, as well as, if necessary, its long-term storage (Duranti and Preston, 2008). Thus, the researchers approached the need to create a so-called trusted environment, as a complex of organizational, technological and technical requirements for working with a record in an information system that ensures the preservation of its main characteristics, including authenticity.

The Russian experience of working with electronic records shows that ensuring their authenticity in practice is carried out in full measure in the trend of global trends. However, the theoretical understanding of many issues, including the concept of "authenticity" in relation to electronic records, needs a deeper development.

3 THE RELATIONSHIP BETWEEN THE CONCEPTS OF "AUTHENTICITY" AND "IDENTITY" OF AN ELECTRONIC RECORD

We find the definition of "authenticity" in a number of national standards, a terminological dictionary for record management. The analysis of the definitions presented in them shows that the concept of "authenticity" of a record in most cases is understood as a definition of its identity. This approach is solely due to aspects of the practical work with electronic records in the management system. In this regard, consideration of authenticity in the context of identity, compliance with any standard brings us to the question of defining the "original", "initial" electronic record. Some Russian experts are looking for acceptable solutions to this issue. For example, M. P. Bobyleva believes that in conditions when a record is transferred from one information system to another, the record received and saved in the new information system can be considered equivalent to the "original", that

is, the original record created and signed in electronic form in "native" information system, subject to compliance with the established requirements of authenticity, reliability and integrity (Bobyleva, 2018, p. 35). This point of view is also supported by A. E. Rybakov, who considers it expedient to introduce the concept of "initial electronic record" into professional terminology. It is in relation to it that the copies in other information systems, as well as those obtained as a result of migration or conversion procedures, depending on the degree of compliance with the original electronic record, can be presented as identical and authentic electronic records (copies of records) (Rybakov, 2018).

A similar position was expressed in 2018 in the scientific report of VNIIDAD, in which it is proposed to store the original and master copy of an electronic record in some information system on the Internet. Verification of one of the presented copies allows one to speak in a qualified manner about the identity of the copies. Accordingly, the original copy stored in such an information system can be considered the "original". A copy of an electronic record that has passed the check for compliance with the "original" can be considered "reliable" and "authentic".

This approach is, in our opinion, conditional, since the definition of identity is the result of comparing a record with some objectively existing standard (original, copy, etc.). Such a comparison is possible only if the standard remains unchanged throughout the entire period of time during which the procedure for confirming the identity-authenticity will be necessary, that is, forever for records with a constant storage period. However, we know that for an electronic record, immutability is not a physically feasible characteristic.

The most consistent and detailed dynamic essence of an electronic record, associated with the technologies of its transformation in an electronic environment, was considered by V.A. Konyavsky and V.A. Gadasin. The immutability (fixedness) of an electronic record is achieved only at the time of recording information on the carrier and is violated in the course of any manipulations associated with its processing and transmission (Konyavskij and Gadasin, 2004, p. 15-17). This means that as soon as we turn to the reference record instance for identification, it will cease to be a reference copy from a mathematical point of view, since at least its metadata will be changed.

Obviously, in the field of office work and archiving, we cannot operate with such an understanding of the mutability of an electronic record. It is very important to remind here that an electronic record for us is primarily a record. Therefore, its fixity in the relative, that is, social sense, which will provide the possibility of its use as an instrument of interaction in social relations, should be important. This is achieved by regulating the work with electronic records, establishing the composition and order of procedures related to the processing and transmission of electronic records.

4 CONCLUSIONS

So, identity is manifested only as a result of social interaction of subjects and it is possible to talk about the identity of copies of electronic records in the context of public relations and their legal regulation. In addition, the composition of the record's metadata will necessarily change. As it goes through its life cycle, metadata will accumulate, but the metadata that was formed at the time of creation of the record, which identifies the record, must remain unchanged. Then again the question arises: what is the point of defining the first instance (it will definitely not be the only one) if the identifying metadata does not change? Maybe the last (or subsequent) copy of the electronic record, which contains the maximum information about the life cycle of the record, should become more valuable?

Indeed, modern information technology makes it possible to compare the objects of the information system. Semantic analysis, today is considered as one of the main

functions of the information system, which provides storage of records and work with them. However, it should be remembered that the object of the information system is not a record, but a file. A record is a social phenomenon; subjects of social relations operate with records. Obviously, even if one file in the information system corresponds to one record, the term "record" denotes an entity different from the term "file".

Such decisions indicate that in the Russian practice of working with records there is still a very strong need to apply traditional methodological approaches to working with electronic records. This can explain the aspiration of Russian specialists (archivists and record specialists) to "assign" the original, to determine which of the records functioning in different information systems will be the most reliable. And in the case when in relation to an electronic record the application of the concept "original" is preserved, an authentic record can act only in the status of an "authentic copy".

It is obvious that such an understanding of the authenticity of an electronic record, which is developing in Russian practice, does not correspond to its foreign meaning. Moreover, the term "authenticity" is very poorly mastered by Russian records management and archival studies, in fact, it is not used in practice and is interpreted mainly as compliance with a certain source record, identity to it. Moreover, the degree of this correspondence remains very vague.

At the same time, there remains a tendency to apply to electronic records the concepts and methodological approaches that have been developed in relation to records in traditional media. This is especially evident in the desire to determine the original of an electronic record when creating an information storage system for electronic records. In addressing this issue, the dual nature of an electronic record is manifested: social and electronic. On the one hand, it should be remembered that, first of all, it is a record and is used in the interaction of subjects of social relations, therefore, the preservation of the content and form of the record, their immutability is a priority task. On the other hand, storing a record in an electronic environment cannot ensure its permanent fixation and inevitably leads to a change and accumulation of metadata associated with electronic record files.

That is why we must admit only a relative recognition of the identity of electronic records, admit the possibility of some changes, some conditional "delta" (Larin, 2017), within which the electronic record retains its social functions. The distinction between copies of an electronic record within this delta makes it possible to speak of authentic records.

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THE ROLE OF ARCHIVAL INSTITUTIONS DURING TROUBLED TIMES: THE CASE OF COVID-19

Abstract:

This article questions the role of archival institutions in times of distress and disruption, with particular emphasis on the current reality of the Covid-19 pandemic. It tries to assess whether archival institutions play active roles at times of distress and disruption or shy away into passive observers' role. The hypothesis is that archival institutions can take centre stage even at such phases, as communities often go into a soul-searching mode during such times. This can provide an opportunity for archives to draw the spotlight on them and partially redefine their position in society.

The approach taken in this study is mainly conceptual, revisiting the insights developing in the growing literature on the topic and supplementing this with participant observation from the author's own experience in the field. It also brings into the analysis two case studies of successful projects that have turned the Covid-19 pandemic into an opportunity for interacting with audiences and redefining the traditional canons of archival practice – preservation and accessibility.

This paper argues that archival institutions could use times of disruption and distress to further emphasise their presence and interaction with the community. The pandemic is not yet over and any results from such assessments are only preliminary. Further analysis, even of a quantitative nature, should be carried out to build on the present assessment, also keeping in mind the geographical and regional differences that come into play.

The most important finding of this study is that times of disruption and distress can act as triggers for more creativity and new ways on how archives fulfil their traditional roles of preservation and access. Further studies can strengthen these findings by adding a quantitative aspect to these findings and also tackle one of the central constraints of this study in the form of diversity of archival institutions discussed and the geographical disparities that make the extrapolation of the findings to other areas challenging.

Keywords: archival resilience, Covid-19, archival activism, memory projects.

1 INTRODUCTION

A substantial amount of studies have been carried out about the reaction of the archival profession in times of war, natural calamities and other forms of social distress. The resulting affects of such disasters also top the list in terms of the academic debate they generate. Issues such as that of displaced archives and the impact these have on much wider phenomena have been under the focus for a number of decades. This even inspired the International Council on Archives (ICA) to set up an Expert Group on Shared Archival Heritage (ICA, 2017). This latter initiative augurs well for a more holistic approach and a shift from the traditional regional perspective to a more international dissection of the issues.

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A number of authors are also reevaluating the work on such topics and using it to revisit the canonical theories that have become quite sacred in our profession. In one such work, Anne Gilliland revisits concepts such as the physical and moral defence of archives emanating from the views of authoritative personas such as Hilary Jenkinson and Ernst Posner. Her work tries to contemplate how historical examples might help the field to prepare today's archivists for the realities of acting and advocating on behalf of records, archives and their constituents in situations of conflict and exigency around the globe (Gilliland, 2018).

This study focuses on the Covid-19 pandemic as a phase of world-wide distress and tries to contribute to the rising academic debate about how cultural institutions are reacting to the situation. The pandemic has forced an inevitable slow down or disruption to our routine. For some of us, stressed with the burden of overlapping diary appointments, such a pause might initially have looked as a providential welcome break. But counteracting this, there was the uncertainty of what comes next coupled with the risks in terms not only of health but also of financial stability. The development of a number of vaccines to combat the virus brought a ray of hope, although a number of scientific studies still argue that the Coronavirus 2 (SARS-CoV-2), may be here to stay (Anderson et. al., 2020)

This article questions the role of archival institutions in times of distress and disruption, with particular emphasis on the current reality of the Covid-19 pandemic. It tries to assess whether archival institutions play active roles at times of distress and disruption or shy away into a passive observers role. The hypothesis is that archival institutions can take centre stage even at such times, as communities often go into a soul-searching mode during such times. This can provide an opportunity for archives to draw the spotlight on them and partially redefine their position in society. This study focuses on the reaction of the National Archives of Denmark and that of Malta to Covid-19, and the projects they launched triggered by the same pandemic circumstances.

2 THEORETICAL BACKGROUND OVERVIEW

Archives represent the permanent memory of the actions and feelings of people as they act and react to the events of daily life. It is this connotation that makes them so powerful and so precious. This study focuses on the role of archival institutions during troubled times. The meaning of troubled times for the scope of this study is defined by circumstances of disruption on a national or international scale that adversely affect the lifestyle of large sectors of the population. In our recent past, war, earthquakes, flooding and other natural disasters were the most troubled times which created archival dilemmas, some of which are still lingering to be resolved.

One debate that is still ongoing is the issue of displaced archives, referred to by terms such as 'trophies of war' (Grimsted, 2001) or under the more positive umbrella terminology of 'shared archival heritage'. Writing about it two decades ago Charles Kecskemeti underlined how challenging such situations are, and the difficulty for international organisations to steer discussions on such topics. In his own words, "when passion opposes passion, rational arguments advocating a negotiated agreement can hardly prevail." (Grimsted, 2001, p. xi). At that time, he argued that UNESCO and ICA had to satisfy themselves with a thesaurus rather than the real settlement of issues.

The Covid-19 Pandemic is a case of troubled times of a different dimension. It is a reality affecting all nations and that managed to reconfigure the way we live. This will undoubtedly also reconfigure the archival record for future generations. Due to the dimension of the crisis the leading international organisations tried to guide the international community and their professional membership cohorts how to best deal with the situation.

UNESCO took the lead and issued a statement titled 'Turning the threat of COVID-19 into an opportunity for greater support to documentary heritage.' The representatives of the various collaborating bodies argued that:

"The way the world is responding to this unprecedented global crisis will be part of history books. Memory institutions, including national archives, libraries, museums, as well as educational and research bodies, are already recording the decisions and actions being made which will help future generations to understand the extent of the pandemic and its impact on societies." (UNESCO, 2020)

In their statement UNESCO came up with four principles and directions urging memory institutions to turn the threat of COVID-19 into an opportunity for greater across borders collaboration and investment in documenting mankind's actions.

When it comes to the 'information professions', the International Federation of Library Associations (IFLA) issued 'Key Resources for Libraries in responding to the Coronavirus Pandemic' (IFLA, 2020). These resources touch on a variety of topics, mostly controversial, as different role players in the system will assess the situation from their different personal perspective. Amongst the topics discussed and guided upon there are the issues of closing libraries, handling and sanitizing materials, social distancing in library environments and the options of working remotely. As opposed to normal office work, holdings in libraries and archives are physical artefacts that make several workflow processes on them impossible to carry out remotely. Notwithstanding, most archives tried to shift to online work through the devising of roster systems for their staff. The sudden need to work from home also resulted in a renewed focus on cataloguing and a more positive perspective towards what work archivists and librarians can really do from their own homes.

In its position document issued by the International Council on Archives (ICA, 2020) it appealed for three important principles to be put into action during the pandemic. The first principle is that decisions must be documented. The second is that records and data should be secured and preserved in all sectors and the final point highlighted is that the security, preservation and access to digital content should be facilitated during the shutdown.

In their statement ICA argued that:

Archives are the custodians of the 1918 influenza pandemic records, which are being studied by scientists around the world and these institutions will eventually be the stewards for records related to the COVID-19 pandemic. The economic and societal impact of the current pandemic needs to be evidenced, not only to prevent and/or anticipate similar events but to understand the effect this event will have on current and future generations. Records and archives are more than paper documents marked 'official record'. ... as the economic impact of COVID-19 is felt around the world, it will also be critical to secure, capture and preserve the records of defunct companies and/or private entities. This way, the social, cultural and even economic significance of former undertakings can live on. (ICA, 2020)

Side-by-side with archives and libraries it is worth looking at museums and to what extent the pandemic is affecting their *modus operandi*. What is most interesting in this case is the impact on collecting policies rather than the services which were also severely hit due to decline in audiences. A recent article by Sandro Debono revisited the concept of Rapid Response Collecting, a concept developed after the 11th September 2001 New York disaster. Such process forms part of the collecting policy of a number of museums and aims to empower museums to collect the ephemeral and the momentous

that might be difficult to acquire once the phenomenon is over. In his article Debono quotes Aaron Bryant, curator of the National Museum of African and American History who argues that, "It is critical that we collect so this moment does not get lost. . . History is happening right before us. . . If we don't collect this stuff, who knows what happens to it." (Bowley 2020, as cited in Debono, 2021).

3 RESEARCH DESIGN

3.1 METODOLOGY

The approach taken in this study builds on the available literature and applies a case study approach. This is supplemented by observations from the author's own experience in the field as a practicing national archivist. The focus is on two case studies of successful projects that have turned the Covid-19 pandemic into an opportunity for interacting with audiences and redefining the traditional canons of archival practice – preservation and accessibility.

The case studies come from two European national archive institutions: the Danish Coronavirus web collection of the National Archives of Denmark, and the Covid Pandemic theme under the Memorja Project of the National Archives of Malta. What follows is an explanation of the rationale of the two projects and archival perspectives that can be derived from them.

3.1.1 CASE STUDY 1: NATIONAL ARCHIVES OF DENMARK

One of the archives that embarked on a Covid-inspired project is the Danish National Archives. This was important as the institution had to close its reading rooms due to the national lockdown and this meant that the covid project was a way to keep active communication with the general community.

The Danish Web collection on coronavirus in Denmark is part of a general documentation on the corona lockdown in Denmark in 2020, embarked upon by the main memory institutions in the country. The stakeholders in the project at the National Archives (Rigsarkivet), the National Museum (Nationalmuseet), the Workers Museum (Arbejdermuseet), local archives and, the Royal Danish Library. The plan to capture corona lockdown documentation was supposed to be carried out into phases. The first focused on the "here and now" collection of documentation during the corona lockdown. This was to be followed by a more systematic follow-up of material collecting from authorities and public bodies.

The first phase of the project consisted of a national call to all Danes to contribute to the corona lockdown documentation, by sending photos and narratives from their daily life while enduring the lockdown. The call under the banner "Days with Corona" was mainly led by the Danish Folklore Archives run by the National Museum and the Royal Library. This effort was also supplemented by Netarchive in the form of a public call for help by nominating URLs of web pages related to coronavirus, social media profiles, hashtags, memes and any other relevant material.

3.1.2 CASE STUDY 2: NATIONAL ARCHIVES OF MALTA

A second institution to embark on a similar project was the National Archives of Malta (NAM). In this case the initiative fitted in as a thematic focus under an already established memory project. The initial phase of the COVID-19 Pandemic Memory Project was to collect any material (e.g. journals, photographs) documenting people's experiences during the current situation. Calls for public collaboration were issued through various means, such as social media, virtual interviews on local television programmes

and newspaper articles. The goal was to connect to many people from different backgrounds as much as possible so as to build a rich collection which would enable the researcher to look at the situation through different perspectives.

Anyone interested in donating their material was subsequently directed to contact the NAM via email in order to avoid any direct contact. In turn, a PDF document with further information about the project was sent. A Donation Declaration Form authorising the NAM to provide access to the deposited material for research and educational purposes was also included.

The response by the public was rather enthusiastic. A total of 71 persons interested in the project have contacted the NAM so far. These include families, the elderly, Maltese and foreigners living abroad, educators (teachers and lecturers), poets, music composers, religious persons, photographers, social workers and students. A large variety of material has already been deposited at the NAM as well. Examples include journals, photographic albums, poems, philosophical ramblings, paintings and video recordings. Current plans are focused on the implementation of the second phase of the project. Following a more structured approach, interviews will be carried out to capture an additional perspective through which one can view the effects of the pandemic on local society. For instance, these include those who were directly involved in its management (i.e., government officials, healthcare workers), business owners, police officers and people who had already been infected by COVID-19.

In view of this, the NAM will showcase an innovative approach whereby interviews will be conducted in a virtual manner. This will serve as an example which will be highlighting the application and effectiveness of an uncommon fieldwork methodology in oral history research. In addition, the recording of information through virtual means will also further reflect the current difficult situation, which would be especially beneficial to the researcher.

3.2 COMPARING THE CASE STUDIES

Comparing the two case studies it was possible to extract certain patterns of thinking with regards to: a. The aims of the projects; b. The acquisition process; c. The marketing strategies; d. Public relations; e. Material accessioned.

a. Aims

The patterns that Covid-19 imposed on National Archives seems to have been quite similar in the countries under review. Both the Danish National Archives and that of Malta specifically stated that the importance of preserving corona pandemic evidence emanated from two needs: Firstly to document and preserve what happened; and secondly as an affective tool in the archives branding in demonstrating the relevance of the National Archives institution within society.

b. Aquisitions

The same affect was also traced when it comes to the acquisition process. The main challenge this event posed was the fact that documentation has to be acquired as events are unfolding. This has put on the institution the need of analysis and discipline in distinguishing between what can be acquired instantaneously and what can wait.

c. Marketing Strategies

Both institutions used all possible social media platforms and other disseminating means to get a public appeal out inviting the private individuals to donate covid-times related material. The Denmark campaign used the statement "Your story of the corona

crisis is an important part of Danish history!" A similar call for action in Malta was, 'do you wish to join our efforts to make sure that persons born in 50 years from now may know our life during this pandemic? These messages were repeated via press releases, TV interviews, and social media publicity mainly via Facebook, Instagram and LinkedIn. Facebook seems to be the most popular due to its easy to use, and wide reach.

The institutions in question highlighted the downside of platforms such as Facebook. Amongst the challenges there is the difficulty of defining a target audience. It also demands constant online presence as the public expects immediate interaction if not answers. Thus, it takes time and resources which can only be acquired gradually and not overnight.

The collecting approaches are different between the National Archives of Denmark and that of Malta. The Danes went for a specific website for content delivery. It includes a form asking for basic personal details about the contributor, photo title, date when the image was taken, and the creator of the photo. The same platform is used to acquire the necessary consents. In the Maltese case study the infrastructure on an on-going oral archives project called Memorja was used. This encourages more formal interviews. Due to the challenge of conducting face-to-face interviews, the emphasis was put on the first phase of the project, that of collecting written diaries and ephemera.

d. Public Relations - Online enthusiasm vs Archival Activism

In both the Danish and Maltese projects one common feature emerges. This is the discrepancy in metrics between the members of the public who showed initial interest in participating and the actual numbers who keep their word. In the case of Denmark, from around 30,000 people who clicked on the Facebook advert and related webpage, only 275 contributed to the initiative.

The team in Denmark thinks that reasons for such funnelling down of numbers might have been the formalisation of the donation. The information requested and the required consent form might have not gone well with an audience used to one-click social media processes such as the use of Likes and Share. While contributors might be discouraged by consent processes, public institutions cannot abdicate their legal and ethical responsibilities in view of GDPR and other considerations. The big challenge is to strike a balance between the regulatory frameworks, and the benefit of such projects to the community.

e. Material Accessioned

When it comes to the material received from the two initiatives, there are also common patterns. Most of the accessions came from private persons and as much as possible no appraisal was done of the donated material. Most donations consisted of pictures from everyday life, showcasing how the people have adjusted their home working environment, public signs, special occasions, and people wearing protective equipment.

The two projects are still ongoing. The main target of the National Archives of Denmark is to work on the second dimension of the project, focused on structured active acquisition from private and public companies. The Danish National Archives will reach out to private companies to submit documentation which would show how the pandemic affected their business and how they are dealing with it. A selected number of private companies have already been approached and have helped in the planning of this phase of the project.

A similar approach was taken in Malta and a number of private companies took the inspiration from the NAM project and launched internal initiatives. Two such organisations

are CareMalta² and the Richmond Foundation.³ This interaction is one of the great benefits of such projects. Apart from having organisations look at national archive institutions for inspiration, they do bring the often refined marketing infrastructure of these organisations on the side of the archives.

3.2 LIMITATIONS OF THE RESEARCH

The pandemic is still ongoing and developing at times in very unpredictable ways. The disparities between countries, both in terms of the severity of the pandemic and the responses by authorities and the public varies considerably. Thus, the study cannot rely on tried and tested methodologies or on the advantage of historical evidence. The analysis is also conducted at a time when the institutions involved are continuously adapting themselves to the realities of time, without having much time to take decisions on scientific evidence that can be built in a gradually planned manner.

The study would benefit a lot if a systematic survey of similar initiatives taken by other national archives can be carried out. Also, the impact of these projects on the traditional services and on the perspectives of users on the institutions need to be studied in future years.

4 RESULTS

This study indicates that the two national archives in question were able to think creatively and to launch new initiatives even during troubled times. Their initiatives were warmly welcomed by the media in the respective countries and this facilitated publicity and reaching out. There are indications that those who participated in the projects feel that they are contributing to the nation's history at a very crucial phase in its trajectory. There is not enough available evidence so far to study what will be the long standing impact, if any, of these initiatives.

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2 CareMalta Group is Malta's market leader in providing quality services in nursing and residential care, independent living for older persons, specialised dementia care and certified courses in health and older persons care. It is a private company established in 1993, and today it cares for over 1,300 residents and employs a workforce of over 1,000 professionally-trained personnel.

3 The Richmond Foundation is a private institution backed by the Maltese government that recognised the gap in services of mental health and set up on 13 May 1993. Today the Foundation, a registered non-governmental and non-profit making organisation (VO/0017), has established itself as Malta's leading NGO in the provision of community services for people with mental health problems. It is at the forefront of the promotion of good mental health and the prevention of mental illness amongst the public.

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Karen Trivette¹

THE WHOLE OF HER SERMON: CONNECTING PEOPLE TO ARCHIVES IN THE AGE OF COVID-19

Abstract

The purpose of this paper is to review and share the challenges and successes associated with efforts to bridge the distance between archives user populations and the digital surrogates of archives materials themselves while in a state of remote operations due to the COVID-19 pandemic of 2020-2021.

I will examine various online outlets and platforms that allow archival repositories to connect with existing and new user populations and, based on visitor or user statistics, gauge the success or failure of a given vehicle. Approaches will include various social media platforms, web-based technologies, and augmented reality. I will examine in detail the visitorship before and during the pandemic for a singular platform, that being Omeka.

The analysis of various online outreach platforms demonstrates that when planned and executed effectively, digital or virtual archives outreach can increase user engagement by nearly fifty percent.

Even during a global pandemic, archivists can successfully reach a host of archives users, existing and new, and can not only meet their expectations but also exceed them in new and innovative ways.

Keywords: *Digital archives; outreach; promotion; web-based technologies; virtual exhibitions*

1 INTRODUCTION

Early in my career as an archivist, I adopted a mantra, of sorts; it is a quote from the 1921 book, *Howards End*, by E.M. Forster. Forster declares, "Only connect! That was the whole of her sermon. Only connect the prose and the passion, and both will be exalted, and human love will be seen at its height. Live in fragments no longer."² This quote has guided my archivist ethos for nearly twenty years and I believe that it has served me well. I only hope it has allowed me to serve others in meaningful ways.

This paper is primarily about telling the story of being in service to others -- of providing researchers with answers to their questions by connecting them to digitized archival materials, specifically during the COVID-19 pandemic.

If there is one lesson to learn from COVID-19, then it is to leverage multiple, online vehicles, platforms, and channels to effectively promote the archives in our care, to sustain interest in them, and to connect successfully to our desired audiences. Archivists must be more creative than ever especially given imposed remote working operations competing with ongoing researcher expectations. Therefore, the need to connect creatively, consistently, and innovatively is as great as it has ever been. To make connections

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2 The entire quote reads, "Only connect! That was the whole of her sermon. Only connect the prose and the passion, and both will be exalted, and human love will be seen at its height. Live in fragments no longer. Only connect, and the beast and the monk, robbed of the isolation that is life to either, will die."

successfully, archivists must consider outreach avenues beyond the traditional outlets and platforms. This paper will introduce you to platforms ranging from the lesser to the more sophisticated technologies we use in FIT/SPARC and those from the most obvious to the most innovative...all in the effort only to connect.

2 LITERATURE OR THEORETICAL BACKGROUND OVERVIEW

Whether operating on-campus or remotely, the mission of FIT/SPARC remains the same: to foster original research across and beyond the FIT community by acquiring, preserving, and providing universal access to primary research materials including College archival records. Access comes in many forms. Especially exciting forms are via today's online channels.

Online outreach is not a new concept for archivists; while this is true, its development is ever changing and ongoing. As early as 2012, Arjun Sabharwal discussed developmental paradigms for successful virtual exhibitions including the need for "accurate historical representation, adequate descriptions and navigation, and Web accessibility" (Sabharwal, 2012, p. 11). Sabharwal continues to state prophetically that while at the time, virtual exhibitions were not yet part of traditional archives practice, they held the promise to be "cost-effective ways for...institutions to provide access to various artifacts, cultural heritage collections, and historical knowledge to visitors in remote locations" (Sabharwal, 2012, p. 9).

The concept is also discussed quite thoroughly in the 2013 paper by Emily A. Bowden entitled, "Archives Outreach in a Digital World: Promoting Digital Content Through Online Outreach Efforts." Almost a decade ago, Bowden commented that "online outreach efforts are increasingly important to the relevance of digital library and archives collections" (Bowden, 2013, Abstract). Relevance can be measured by many factors, not the least of which is how valuable archival content is to researcher interest. Little did Bowden and other archivists realize just how important such efforts would be less than ten years later during a global pandemic. What was an addendum to and growing trend in our archival practice became mission-critical almost overnight.

Outreach is defined by the Society of American Archivists (SAA) as "the process of identifying and providing services to constituencies with needs relevant to the repository's mission and tailoring services to meet those needs" (SAA, 2020a). Outreach might involve any of various methods of practice including and not limited to mounting exhibitions, conducting information literacy instruction, and engaging in collaborative programming.

Gemma Cattel goes further to say that "outreach is a vital component of any archive or library service's strategy, and this applies as much to digital archives created via digitisation as it does to physical ones" (Cattel, 2015).

Conceptually, outreach is adjacent to the notion of advocacy; SAA defines advocacy as "activities in which archivists and their allies engage to gain support for archival records, the institutions that manage these records, archivists, and the archives profession" (SAA, 2020b). By reaching out to myriad constituencies, archivists have the added opportunity to cultivate support of many types beyond that of visitorship and use of archival material.

Indeed, with the onset of the pandemic, many institutions found themselves also facing a new or exasperated economic crisis. Battle, Mobley, and Gilbert convincingly argue that "virtual outreach strategies are particularly crucial for these institutions at a time when operating budgets are often stagnant or shrinking, despite increasing demands for accessing greater and more diverse audiences" (Battle, Mobley, and Gilbert, 2016, p. 35).

Cultural institutions, including archival repositories, must always be at the ready to employ ever more engaging technologies to cultivate a following of visitors and supporters, financial and otherwise. To achieve this goal, archivists must be willing to test and explore uncharted technological territories. It appears they have been doing just that. In their chapter, "Experience Design for the Humanities: Activating Multiple Interpretations," Ruecker and Roberts-Smith stated that to "enhance the experiences of their audiences, cultural and educational institutions have been leaders in adopting emerging technologies to provide context for the cultural content they offer" (Ruecker and Roberts-Smith, 2017, p. 3). This bodes well for both the institutions and their supporters, regardless of their physical proximity to one another.

As recently as February 2020, the importance of online advocacy and outreach was the subject of a substantive paper from the Consortium of Academic and Research Libraries of Illinois or CARLI; the paper entitled, "Guidelines for the Promotion of Digital Collections: Best Practices for Promotion and Marketing" focuses in-depth on social media outlets as means of digital archives promotion and outreach. What is especially valuable about this source is its emphasis on the audience(s) for various platforms and the sustainability of the tools themselves. CARLI also states an important point, that being, "attempting to promote all collections to a general audience on a single platform, however, is not the most effective approach" (CARLI, 2020, pg. 4). Therefore, employing multiple vehicles and considering their specific appeal to targeted audiences is recommended.

Even more recently, and right in the middle of the pandemic, Clerkin and Taylor note that physical inaccessibility gives closed institutions' digital apparatuses "a sudden, out-sized importance: seeking to maintain public access to their intellectual and collections resources, [cultural institutions] scrambled to go remote, relying on existing digital infrastructures, accelerating in-process digital projects, and trying new online behaviors" (Clerkin and Taylor, 2021, pg. 165).

3 RESEARCH DESIGN

While it is clear that virtual and/or online endeavors are now mission-critical, it is not enough simply to reach out; archivists can make a best effort day and night but to what effect? Archivists must also gauge the success and effectiveness of their efforts. Because of the sophistication of certain platforms, varied and detailed analysis can be cultivated by using analytical mechanisms built into online outreach tools.

Below, I wish to share the example of FIT/SPARC's analysis of its Omeka instance's use, which we employ for online images, collections, and exhibitions, all hosting digitized or born-digital archives assets. Collectively, these online resources are what we call SPARC Digital.³

We are able to analyze visitorship to SPARC Digital via Google Analytics (GA). GA can be manipulated in dozens of ways to display a variety of data. My interest for the purpose of this paper is to get an overall sense of visitorship to the site before and then during COVID-19 remote work operations. GA allows one to display myriad data points and with beginning and end date parameters.

My first date range for the purpose of analysis was 17 March 2019 through 16 March 2020, the last calendar year my unit was operating under normal circumstances. The second date range was 17 March 2020 through 18 January 2021, the date I am writing this part of my paper. During this range, my unit operated almost completely remotely.

3 <https://sparcdigital.fitnyc.edu/>

4 RESULTS

Results of my Omeka instance analysis are meaningful and illustrated by Figs. 1 and 2 below. The number of visitors increased a total of 56.56%. Visitors are defined as those who have initiated at least one session during an established date range. The total number of new users was a nearly identical 56.55%. New users are defined as those who are first-time visitors during an established date range. Also pleasing was the increase in the number of sessions, which rose by a very healthy 57.97%. A session is defined as a period time a user is actively engaged with a website or any similar tool. Also noteworthy is the fact that the date range in the first analysis was twelve months or an entire calendar year. The second analysis is for a mere ten months, which were worked in nearly complete remote operations.

Fig. 1: Screenshot of FIT/SPARC Digital/Omeka analysis for March 17, 2019-March 16, 2020 (photo: Fashion Institute of Technology-SUNY)

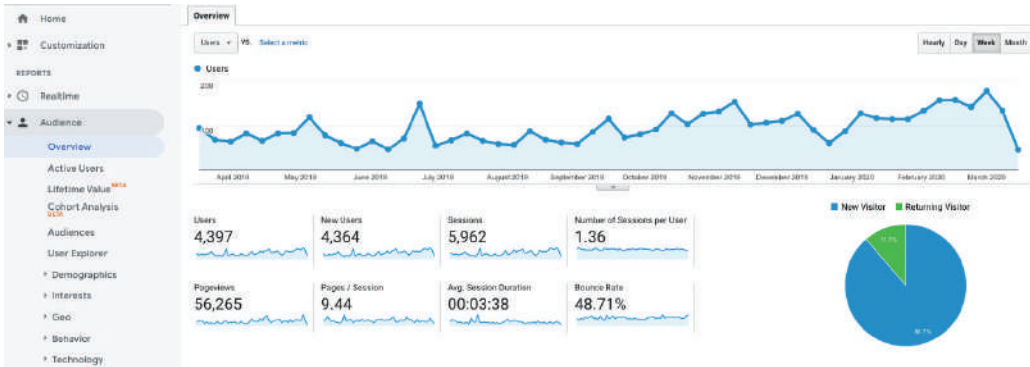
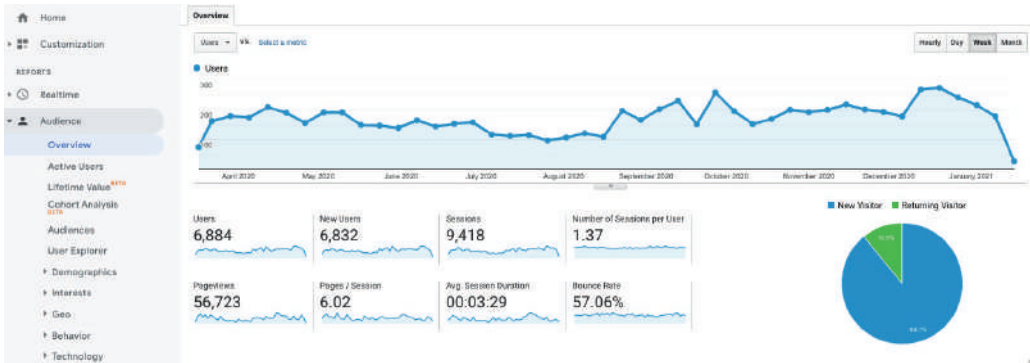


Fig. 2: Screenshot of FIT/SPARC Digital/Omeka analysis for March 17, 2020-January 18, 2021 (photo: Fashion Institute of Technology-SUNY)



5 DISCUSSION

While the channel I have discussed thus far demonstrates to be very effective when attempting to connect to researchers, "it is worth noting that an outreach strategy employing a mix of complimentary channels will deliver the best [outreach] results" (Catel, 2020). I will discuss these in the following sections.

5.1 SOCIAL MEDIA CHANNELS

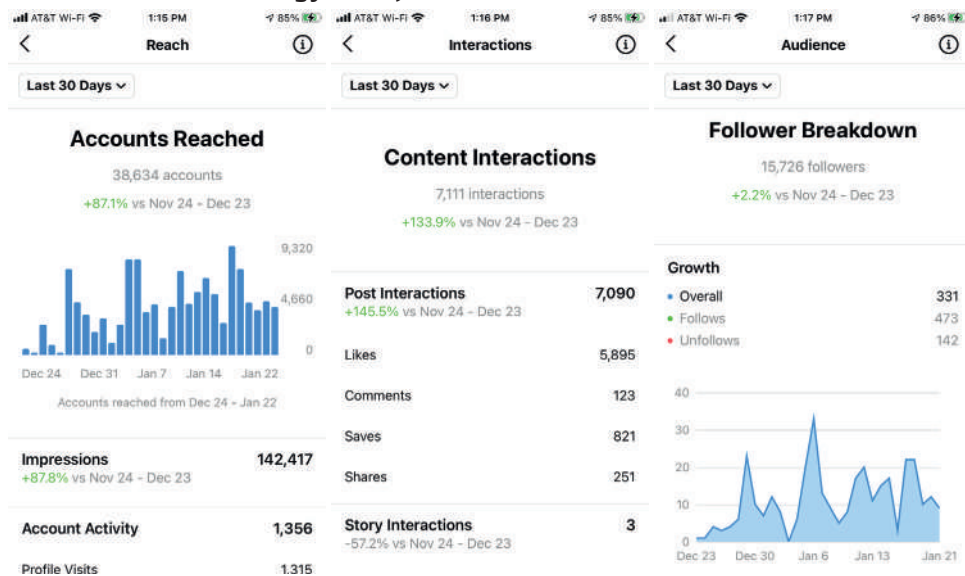
Perhaps the most obvious and traditional outlets for online outreach are those of the social media sphere. "Social media is an effective way to promote digital collections" and

engage many new and different audiences (CARLI, 2020, p. 8). However, the question for archivists is less a matter of if you employ these, but rather more a matter of how active, effective, and strategic you are with these channels. "Social media platforms allow you to build an audience through a variety of interactions" (CARLI, 2020, p. 4). Therefore, archivists are only limited by their imaginations when employing these online vehicles to connect to their use populations.

As for FIT/SPARC, we use, from the most to the least active: Instagram, [fitspecialcollections](https://www.instagram.com/fitspecialcollections/); WordPress/Blog, <https://blog.fitnyc.edu/materialmode/>; Facebook: @SpecialCollections; and Twitter: @SPARCFIT.

Our **Instagram**⁴ instance is the most active of all our social media platforms. We deliver a new post nearly every day and to date, we have posted 1,088 times. At the time of this writing, we have 15,700 followers. Instagram provides rich analytics (which it calls "Insights") so we can learn various points of statistical interest including and not limited to accounts reached (Fig. 3); content interactions (Fig. 4); and follower breakdown (Fig. 5).

Figs. 3-5: Screenshots of FIT/SPARC Instagram Insights for January 23, 2021(photo: Fashion Institute of Technology-SUNY)



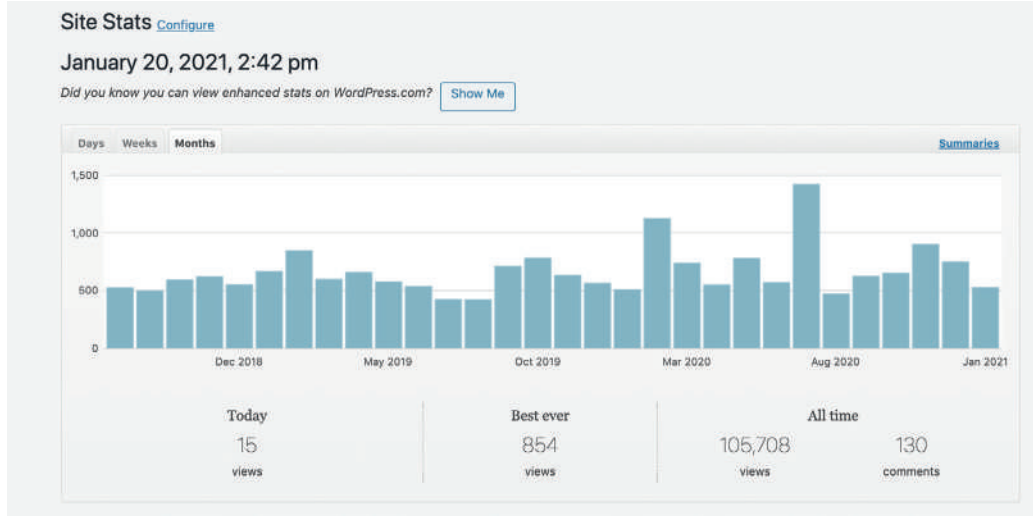
Our **blog**, entitled, "Material Mode,"⁵ is hosted by Wordpress⁶ and is very well received. Most contributions are offered by FIT/SPARC Associates, who are fashion historians and/or digital archivists. This platform allows our Associates' writing to shine as it provides for lengthier and more robust content per post. As of this writing, "Material Mode" has been viewed by nearly 106,000 community members.

4 <https://www.instagram.com/fitspecialcollections/>

5 <https://blog.fitnyc.edu/materialmode/>

6 <https://wordpress.com/>

Fig. 6: Screenshot of FIT/SPARC “Material Mode” analytics for January 20, 2021(photo: Fashion Institute of Technology-SUNY)



Our **Facebook** and **Twitter** instances are the least active online outreach channels; however, I would like to see greater momentum with their use in the future. Currently, we have 2,604 Facebook community members and 1,672 Twitter followers. Due to our inactivity with these platforms, the number of impressions, visits, and follows have remained relatively flat over time.

5.2 WEB-BASED TECHNOLOGY: OMEKA

An original endeavor to plan and install a physical exhibition on the FIT campus was sidelined with the onset of the pandemic. So, in response, I planned and coordinated an online exhibition that incorporated still and dynamic content as well as augmented reality, which I will discuss more in-depth in a moment. Prior to the pandemic, FIT/SPARC staff already employed an Omeka-supported online, digital content delivery space. With the postponement of the aforementioned physical exhibition, I decided to push Omeka's limits with the installation of the exhibition entitled, *Max Meyer and A. Beller & Co.: Interpreting a Hidden History of NYC's Garment District*.⁷

According to its creators, "'Omeka' is a Swahili word meaning to display or layout wares; to speak out; to spread out; to unpack...it signifies the practices that Omeka helps its users to do with digital content and through building digital projects for online communities" (Corporation for Digital Scholarship, 2020).

From 27 February through 01 December 2020, online exhibition planners, designers, and otherwise contributors met on a weekly basis to consider all aspects of what the show should deliver to visitors. This exhaustive exhibition was launched on 07 December 2020. What do I mean by exhaustive? With the aid of faculty-librarian colleagues, Prof. Joseph Anderson and Prof. Miyo Sandlin, I requested as much performance as technology at our disposal would allow for a complete online exhibition experience.

⁷ <https://sparcdigital.fitnyc.edu/exhibits/show/meyer-beller>

As one navigates the exhibition, one finds an immersive online environment enhanced with augmented reality; it also will eventually offer a 3D component as well. The coat in Fig. 9 will be captured with 3D rendering technology via a series of cameras. This capture's resulting image will allow visitors to experience the coat fully in the round and from dozens of vantage points. Again, using augmented reality, one will be able to view the 1920s coat as if it were in the same space as the visitor. I discuss these technologies in more detail below.

5.3 WEB-BASED TECHNOLOGY: VOICETHREAD

When COVID-19 first began its devastation, sending my colleagues and me into fully remote operations practically overnight, all FIT Gladys Marcus Library unit leaders, including me, were charged with creating online tutorials and orientations to be sure that even while operating remotely, the library, its faculty-librarians, and its staff would remain relevant to our user communities within and beyond the university. I opted to use VoiceThread⁸ technology given its inherent collaborative nature.

A "VoiceThread" is defined as "a collaborative, multimedia slide show that holds images, documents, and videos and allows people to navigate slides and leave comments in 5 ways - using voice (with a mic or telephone), text, audio file, or video (via a webcam)" (State University of New York-Polytechnic Institute, 2021).

Depending on one's delivery method, VoiceThread visitors can be very participatory and offer comments or even be given editing privileges. I make our final version VoiceThread slide shows available via my unit's YouTube channel⁹, which, as yet another social media platform, extends even further the reach of content to ever more and diverse researchers.

5.4 WEB-BASED TECHNOLOGY: SPRINGSHARE

Another web-based platform we use is provided by the source Springshare.¹⁰ The online outreach tool we employ from them is LibGuide.¹¹ At this site, visitors can locate instructions for navigating nearly all that FIT/SPARC has to offer including answers to frequently asked questions, many of our online archives finding aids, and more. In short, it serves as a primer to the unit's operations, services, and products.

Springshare helps information professionals, including archivists, operate more strategically in what it refers to as a "digital-first world" by empowering them to provide enhanced service to users (Springshare, 2020a). With the LibGuide mechanism, information professionals can curate resources, share content, provide answers to most often asked questions, engage a larger community of users, and, even better, analyze the use of various tools and services (Springshare, 2020b).

In Fig. 7, readers will see view count statistics for our FIT/SPARC LibGuide from September 2019 through September 2020.

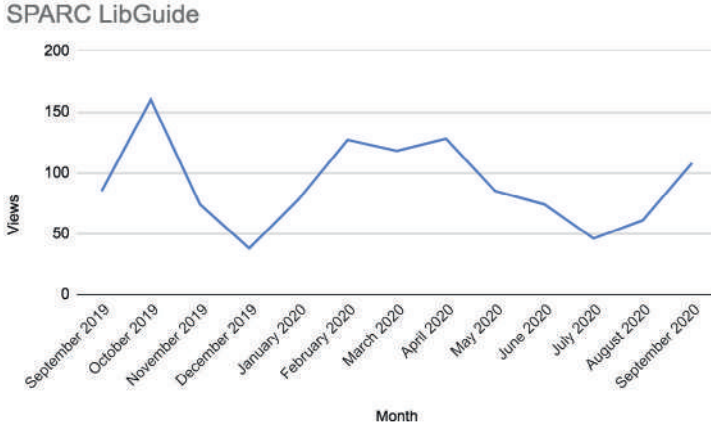
8 <https://voicethread.com/>

9 <https://www.youtube.com/channel/UCR0yYv90yF6thjr1nQVfhnw>

10 <https://www.springshare.com/>

11 <https://fitnyc.libguides.com/sparc>

Fig. 7: FIT/SPARC LibGuide view counts, September 2019 through September 2020 (photo: Fashion Institute of Technology-SUNY)



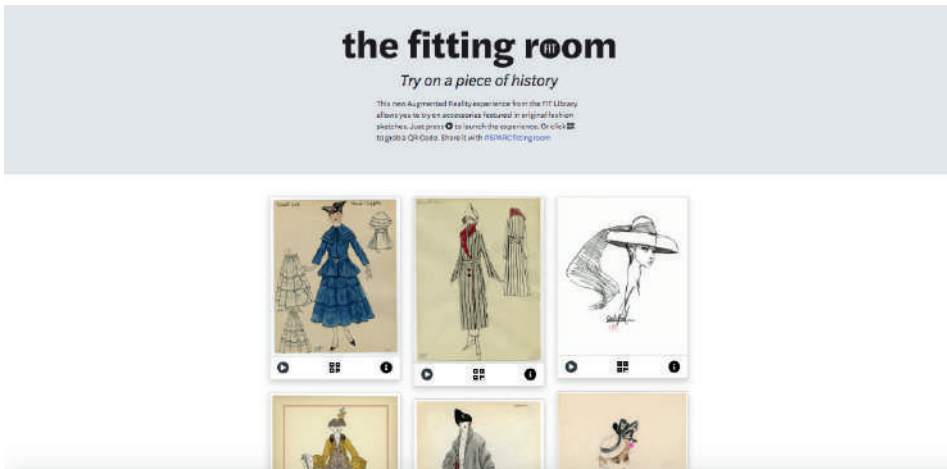
5.5 AUGMENTED REALITY: ZAPWORKS

The FITting Room¹² is an augmented reality (AR) experience that allows visitors to virtually “try on” rare and even unique holdings from the archival material my staff and I care for. The landing page is seen in Fig. 8 below.

Built using the ZapWorks Studio¹³ platform, this AR experience helps to bring historical source material nearly to life. Visitors can virtually try on accessories such as hats, scarves, and/or earrings, which are featured in FIT/SPARC original fashion sketches and illustrations by legendary artists.

ZapWorks Studio enables archivists and others “to create fully-customisable AR, VR and MR experiences across print, product, packaging, retail, events and much more” (Zapworks, 2021).

Fig. 8: Screenshot of FIT-SUNY FITting Room website (photo: Fashion Institute of Technology-SUNY)



¹² <https://fittingroom.fitnyc.edu/>

¹³ <https://zap.works/studio/>

5.6 3D-RENDERING TECHNOLOGY: 3DCOPYSYSTEMS

An even more sophisticated technology required me to engage with FIT's DTech Lab.¹⁴ This lab is an extension of FIT's Innovation Center; it is a true laboratory where FIT students, faculty, and external industry partners collaborate to advance new ideas, solve real-world problems, and inspire interdisciplinary research. Its mission is to partner with others, like me, using the most sophisticated and innovative technologies such as those found at 3dcopysystems.¹⁵ The garment you see in Fig. 9 is one of fourteen featured garments in the online SPARC Digital exhibition mentioned earlier.

Fig. 9: Evening Coat, circa 1920s, European or American, silk, metallic thread embroidery, School of Graduate Studies, Department of Fashion and Textile Studies, Garment Study Collection, F.2016.16, FIT (photo: D. Paterson, 2020)



The Big ALICE studio¹⁶ is the largest photogrammetric object-capturing mechanism of 3Dcopysystems' product catalogue (3Dcopysystems, 2021). All told, the studio consists of sixty-four individual cameras; it provides not only enough space for up to 6 people, should your project require such capacity, but also it offers an extremely high resolution of capture. High resolution helps to ensure a high quality of any associated texture, which plays a very important role in capturing textiles and delivering extraordinary and realistic results.

14 <https://dtech.fitnyc.edu/webflow/index.html>

15 <https://3dcopysystems.com/>

16 <https://3dcopysystems.com/big-alice/>

Fig. 10: Image of the Big ALICE studio (photo: 3Dcopysystems, 2021)



Ultimately, the coat's 3D file will be embedded within the online exhibition space for a full, in-the-round experience of the garment for visitors.

6 CONCLUSIONS

As we have seen, online outreach via various means, including digital or virtual exhibitions, has a rich history and is mission-critical to our present and future successful archives practice. Almost a decade ago, an ever-growing "demand and support for digitized content...paved the way for local, regional, national, and global collaboration on developing digital collections, metadata schémas, and preservation standards to share content and metadata" across operating units and certainly beyond. "Virtual exhibitions represent one of the outcomes of these trends" (Sabharwal, 2012, p. 8).

Only connect! That has been the whole of my sermon for nearly twenty years and has been my foremost message in this paper. It is worth repeating that it is not enough to make an effort to reach out to and hopefully connect to researchers. Archivists must not only employ innovative online outreach methods but also measure their effectiveness, meaning both those of the archivists as well as the tools at their disposal. With today's tools and their associated analytical means of effectiveness measures, archivists can know with little doubt if they are meeting their online outreach objectives and successfully and meaningfully connecting to researchers.

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Robert Parnica¹

ACCESS TO ARCHIVES AND THE CHANGING ROLE OF REFERENCE SERVICES IN DIGITAL ERA (SELF-REFLECTION OF THE SHIFTING ROLES FROM CLASSICAL TOWARD MODERN REFERENCING)

Abstract

This article investigates how external and internal factors affect the activity of reference services in a microenvironment that very often remain under the radar. The author inquires how the continuous internal dynamic of a constant and complex interaction between researchers and reference archivists changed both users' habits and reference archivists.

The case study presents results of one private and University archive. We use quantitative and qualitative methodologies to analyze and describe statistical data in 17 years to ascertain external and internal factors affecting reference services. Observation and self-reflection proved useful from the institutional point of view and the societal, educational, and even political.

The statistical data encapsulated in the institution's Researchers Database traced crucial moments such as political, educational, or pandemic that affected reference activities such as numbers of new researchers, visits, the total number of requested materials, and digital reproductions. The author ascertains a vital shift in users' intellectual assessing archival records, which does not happen in the research room but outside of it. Such a change in research strategy caused difficulties to archive and retrieve a mass quantity of data. Finally, reference archivist is expected to acquire new reference knowledge and apply emotional intelligence in daily communication with users, especially when conducting entry-interviews.

Reference services are under a constant process of gradual transformation, mirroring macro events on its micro-community. The archival research rooms became not just physical places where reference archivists are knowledge mediators between archival records and their users but also an area of lively intellectual interaction and sophisticated mediation with the ultimate goal of creating a new knowledge. Although ambitiously designed, this study is a modest attempt to indicate a complex nature of change that considerably affects the interaction between users and reference archivists.

Keywords: *Reference services, reference knowledge, reference interaction, knowledge creation*

1 INTRODUCTION

The benefits that researchers enjoy today concerning physical access came from a long and not always easy process of the historical development that came with dominant

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societal, intellectual, and political currents in history.² Today, public access to information represents a fundamental human right that creates favorable conditions for a free exchange of ideas in a democratic society. This paper partly reflects on the importance and the value of the archives for the community and how society, too, impacted archives and their access policy. Thus, each historical epoch created a set of societal values and norms that archives encapsulated within their holdings.³ The article analyzes past 17 years of reference services in one private and University archives.⁴ It is a self-reflective observation and the analysis of the dynamic of transformation. The article is ambitious because it reflects three research themes; societal impact to access to archives, reference services as the mediating point, and reference archivist with archival reference knowledge and skills.

2 LITERATURE REVIEW

Caused by the postmodernist inquiry into the archival field, and supported by the advance of new technology, decades after the "archival turn" were marked by the emergence of new concepts and paradigms that embraced archives and archival science in general. Archives became dynamic places where records were reassessed and re-contextualized, which created new possibilities for a new type of users who strived to create new scientific knowledge by re-evaluating old records and using new methodological lenses (Cook, 2001; Yakel, 2000; Duff & Fox, 2006).

The interest in archives and archival science was continually growing over the past several decades, so is the number of studies (Cox, 1992).⁵ In the first part of the 20th century, there were two important works of a Dutch and British writer who focused on archives, archival theory, and recordkeeping (Jones, 2002). As the European recordkeeping system differed from that in the US, Schellenberg published his set of lectures to develop new archival principles and practices (Schellenberg, 2003). Whalen's book on reference services compiled practical reference experiences from various cultural heritage institutions such as museums, galleries, and other institutions (Whalen, 1986). The state of the art of the 1990s is described by Mary Jo Pugh's in her classical work in which she analyzed commonly accepted standards for archival reference services in the United States (Pugh, 2005). Although written in 1993, this book today does not entirely fit the criteria caused by the fast technological transformation.

2 From its emergence, archival records and documents were carefully preserved since the origin of the first civilization. Ernst Posner wrote a classical piece, "Archives in the Ancient World," in which he analyzed ancient cultures from Egypt, Sumer, and Persia to India and China (Postner, 2003). His main argument is that the records were accessible only for the privileged members of the ruling elite, administration, priests, and rulers. Written documents described microcosms and historical events without any explanation of their causality. Their world was perceived not as linear time passing but rather a cyclic - a constant repetition of divine principles and laws as the universal solution for all epistemic questions that anybody could not challenge (Valge & Kibal, 2007). According to Le Goff, cities became "the center of a politics of memory" (Le Goff, 1992, 59-60). First, the creation and control of memory led to the control of history, mythology, and finally to - power (Cook, 2001). This dominant paradigm of archives and power became a central topic in the works of many intellectuals and philosophers, M. Foucault, E. Ketelaar, and others. Michel Duchein offered linear chronology for the history of archives and access to archival institutions: from the early civilizations up to the beginning of the 19th century; 19th century up to World War II, and access to archives from the end of WWII up to the 1980s (Duchein, 1983). The technological and digital transformation from the early 1990's up to nowadays requires new and revised views (Klasinc, 2019).

3 Recent writings on state of the art in archival science and access to archives see Novak, 2016 and 2019; Rajh et al., 2013; Gilliland & Mckemish, 2006; Duff, 2006; Klasinc, 2019; Katelaar in edit. by McKemisch, 2017; Kecskemy & Szekely, 2005 and others.

4 The description of the case study was conducted by analyzing statistical data in the past 17 years (2003-2020)

5 Frequently archival and library reference services were understood interchangeably, or the library reference was favored by the authors because there were more ordinary people visiting and using libraries than archives.

In this article, reference services are considered an integral part of the "access" to archives concept, a service developed during past 200 years to facilitate access to users by establishing precise rules and regulations for the protection of records (Schellenberg, 2003). Today reference services are shifting from providing physical access to records toward mediation between archival holdings and users increasingly focused on obtaining information from and about the record in the process of acquiring new knowledge (Yakel, 2000)

3 RESEARCH DESIGN

"Access" to archives and "reference services" are two terms that are inseparable from each other and which are used interchangeably in this text. The term "access" possesses at least two sets of meanings, firstly, it includes rules and regulations that govern access into the research room and use of records, and secondly, it contains the whole set of concepts and theoretical paradigms developed throughout history (Duranti, 1989; Eastwood, 1994; Bloiun, 1999; Cook, 2001; Gilliland & Mckemish, 2006; Yakel, 2011).

The historical analysis of literature proves how then, but also today, societal and other external factors can cause changes in access policy's dynamic. The author selected the case study analysis of one private and University archives in Hungary, where the dynamic of social and political events reflected considerably to access. The analysis of the last 17 years of the archives' reference activities is primarily based on the available statistical data from the Researchers Database and official Annual Reports. The author tries to detect external and internal impulses that caused oscillations and disturbance in reference services. The parameters used as a reference and object of analysis include numbers of newly registered researchers, number of visits, archival materials served, and number of reproduction made in this period (See Table 1).

The section continues with observing the activities inside the research room while analyzing users' research techniques and how they changed over time. Reference archivists became cognizant of adopting new communication techniques with users who became much more knowledgeable of archival fonds. The last part of the paper is a self-reflection on the process of creating trust between users and archivists based on the Archival Reference Knowledge Model suggested by Duff, Yakel, and Tibbo (Duff et al. 2013). They defined three significant types of knowledge inherent to a reference archivist: a. collection knowledge, b. research knowledge, and c. interaction knowledge. For the researcher, the essential knowledge is 'collection knowledge' that derives from familiarity with catalog and is structure and fonds' standardized descriptions. It can also be accumulated by processing archival collections and curating digital collections. Contextual knowledge is the intrinsic part of the 'collection knowledge' and, in many cases, more important than folders' content. Research knowledge represents a set of skills and characteristics about how to conduct research. It comprises 'domain knowledge' (profound knowledge of the research theme) and research methodology to 'artificial literacy,' a skill of understanding how to read records as objects among various genres and interpret them. 'Interaction knowledge' presupposes knowledge of people inside and outside the institution, organization of the institution, and access systems with all rules, standards, and procedures. (Duff et al. 2013:86).

The study has several limitations, from practical and conceptual points of view such as 1. The case study data observed relates only to a private and University archive. 2. The study could not reflect on all external and internal factors that can make an impact on access. 3. Due to different geographic, political, intellectual, and cultural differences, this micro observation might not always follow general trends in the national context.

4. Not all statistical data will be analyzed, including qualitative. Data presented are also not in absolute numbers because of some inconsistencies.⁶ 5. Study will neither cover the digital component nor focus on the analysis of archival procedures and regulations. 6. The study only partly elaborates on users' habits.⁷ Some of these issues will be in focus in the future.

4 RESULTS

4.1. RESEARCH ROOM AND INTERNAL AND EXTERNAL IMPULSES

The Researchers Database (2003 – 2020) and Annual Reports (1995 – 2020) identified four turning points in trends when reference services faced disruption and a decline in the number of visitors (Table 1).⁸ There was one point when these numbers started to change upwards, illustrating a positive moment. The first remarkable decrease in visits we see in 2006, when archives moved from the central University to a new location (Table 2). From 1995 to 2005, the research room was an intrinsic part of the University library and its reading room (OSA Annual Report, 2006).⁹ The University students could easily switch from one reading room to another, even during short breaks between classes. The new location forced students to change their research strategy and adjust visits according to their schedule. Instead of frequent and short visits before, they had to plan a visit and spend more time at the new location - less frequently. From 2006 till 2010, the number of new researchers steadily grew, and in 2011 it reached figures before the move (Table 2). A vital contribution to the increase in numbers of new researchers and their visits was in establishing the Visegrad scholarship that was founded in 2010 by the International Visegrad Fund (OSA Annual Report, 2010).¹⁰ The scholarship provided 15 places for the scholars from the region to spend up to 2 months at archives researching. This scholarship has secured a constant flow of researchers up to today.¹¹ Since 2017, the University experienced unprecedented political and media pressure, which also affected the number of visitors (OSA Annual Report, 2018).¹² Due to the legal acts that prevented the University's functioning in Hungary, a decision was made to partially move University teaching to Vienna in the academic year 2018/19 and entirely in the academic year 2019/20 (OSA Annual Report 2017).¹³ The archives, i.e., Blinken OSA, as an integral part of the University remained in Budapest. Finally, the last turning point happened in 2020, and it has been continuing with the global pandemic of Covid-19. It caused mass closure and a drastic reduction of international travel. 2020 is regarded as the worst year in the history of archival reference services of Blinken OSA ever (Table 2).

6 One example, reference archivists trust researchers to report an approximate and not precise number of their digital images. The researcher's input is added into the Researchers Database.

7 Due to the lack of time and the paper's prescribed length, I cannot reflect on other issues.

8 Data from the early period 1995-2003 are not complete. That was the reason not to include them in the statistics for analysis. All administration was kept manually and by administrative staff without knowledge of English. 2003 was a turning point when a new, access based database for registration and monitoring was introduced. It simplified the process, reduced the mistakes, and helped reference archivists to locate archival materials.

9 <https://www.osaarchivum.org/files/page/420/587/rferep2006.pdf> (28.01.2021)

10 The Visegrad scholarship offered 15 grants annually with the design to provide access to the Archives for scholars, researchers, artists, and journalists. The grant covers travel to and from Budapest, modest subsistence, and accommodation in Budapest for a maximum research period of two months. <https://www.osaarchivum.org/work-with-us/fellowship/visegrad-scholarship/report-2010-2019> (21. 01. 2021.)

11 <https://www.osaarchivum.org/work-with-us/fellowship/visegrad-scholarship/winners-and-reserves> (21. 01. 2021.)

12 <https://ar2018.osaarchivum.org/> (28.01.2021)

13 <http://ar2017.osaarchivum.org/> (28.01.2021)

4.2. OBSERVING THE RESEARCH ROOM AND USERS

Compared with the late '90s and early 2000s, careful observation can distinguish significant transformation inside the research room. The portable computers were rare, and a majority of users took notes on paper. As the technology progressed and archives moved to a new location, new hardware and software replaced the old one. The research room was equipped with audiovisual and TV sets together with microfilm readers. The archives introduced PC stations for the electronic catalogs in 1999 and the first scanner in 2005. In 2000 archives decided to stop producing Xerox copies and thus transferred all copy reproduction responsibility to the researchers (OSA Annual Reports, 2000, and 2006).¹⁴

The emergence of digital cameras in the research room also brought to a profound transformation of users by adopting new research strategies to make digital reproductions and the research process. Facing unlimited possibilities for digital copies, researchers spent more time ordering and dealing with the number of boxes and folders rather than studiously analyzing their content (Table 3). Instead of working with one archival box at a time, users requested maximum archival boxes.¹⁵ Users also completed their work in a much faster fashion. The introduction of digital photo cameras brought to some notable effects: a. users became more interested in the quantity of entire body of related resources applying 'holistic' approach to check 'everything possible'; b. the accumulation of a significant number of digital images takes considerable time for archiving and retrieving; c. the cognitive process of reading and critical assessing of records is happening outside the research room. Users spend less time analyzing and taking notes but instead creating metadata of their archived files; d. while searching for materials, users often got the inspiration for a new project and worked simultaneously.¹⁶

4.3. INTERVIEWING RESEARCHERS – ESTABLISHING THE TRUST

This first communication between researcher and archivist is crucial to obtain information important for placing research question in the historical context and context of archival fonds. Archival praxis (OSA Annual Report, 2017),¹⁷ proved that there are several types of introductory interviews. The first type is for the 'first time visit' users. Their research topic is neither clearly defined nor research question - crystalized. They neither know the structure of archival collections nor are they familiar with online finding aids. These users require extra time and attention because they need guidance throughout the process, from finding online call numbers of an archival container to completing a request form. They are instructed how to use search engines and to navigate throughout the archival fonds, sub fonds, with an ultimate goal to make them fully independent. Besides, researchers are informed about the basic research room Rules and Regulations and how to fill in and complete the Registration Form and the Request Form. The second type of interviews pertains to researchers familiar with the institutional web site, who possess solid knowledge of archival fonds, and whose research question is unique and very specific. They might also acquire contextual knowledge but still miss a piece of in-

14 Researchers are encouraged to bring their cameras to produce as many digital images as they want without restriction. The permission to make digital images was granted after they signed the Researcher's Statement by which they were obliged to use them only for academic and educational purposes. <https://www.osaarchivum.org/files/page/420/587/rferep2006.pdf> (28.01.2021)

15 <http://ar2015.osaarchivum.org/> (28.01.2021)

16 Besides institutional Visegrad Scholarship, several researchers mentioned financial constraints in their institution, receiving fewer funds for shorter research periods. A few foreign researchers came on their using vacation days and financing entire stays.

17 <http://ar2017.osaarchivum.org/#cbp=/staff-subjective/> (28.01.2021)

formation to complete their findings. Interviews with such researchers are demanding and require full attention from the reference archivists. In many cases, archivists also need to demonstrate emotional competence, i.e., willingness to find the answers. Users' questions became increasingly complicated, often bringing archivists to a new level of granularity of maybe unknown microhistory. Reference archivists demonstrate an ability to listen carefully and simultaneously to draft the answers that match the user's expectations - mentally. The third type of interviews makes a group of researchers who are rarely in archives or come once in their lifetime. These could be students who came to complete their seminar paper or elderly to find genealogical connections or some professions outside the academic milieu. They are unaware of the record's context or provenance, and if it is a forgery and reliable document, they primarily seek an answer to their current inquiry.¹⁸

Interviews with users play a significant role in the building of mutual trust. The archivist must demonstrate full intellectual and professional capacities that include demonstrating archival reference knowledge (Duff et al., 2013). Reference archivists should use diplomatic methods to evaluate and estimate the user's research topic and dedication to complete the task. Based on this, archivists can structure the conversation almost instantly. Interview thus helps in a mutual process of creating the trust for common collaboration, which is crucial for completing the research. This process of building professional trust seems to be underestimated because of its complex nature. Interpersonal and emotional competence vary from one to other reference archivists, and it is difficult to 'measure' or prescribe. To sum up, reference archivists must carefully assess the researcher's request, based on specific criteria and apply the interview strategy accordingly.¹⁹ Archival research rooms became places where reference archivists also became significant intellectual mediators and active collaborators in stimulating the knowledge production process.

5. DISCUSSION

Access to archives can unpredictably be affected by external social, political, and internal factors. Among internal factors, it could be interesting to investigate further how a change in academic curriculum stimulates or diminish interest in particular topics. Table 1 offers different data for other types of examination.²⁰

The archival reference knowledge model proposed by Duff et al. This author would enrich with additional thoughts and suggestions. The principal remark lies in underestimated ethical principles in which the archival reference knowledge operates. Although principles could not be associated with 'knowledge,' I would suggest a term that combines ethical and interpersonal behavior - 'emotional intelligence' - the basic principle of empathy and a positive attitude toward the users' needs.²¹

The 'emotional intelligence' could comprise the following elements: a. willingness and commitment to help and provide information even if archival materials are not available or information is incomplete. It also includes human and democratic approaches

18 Every interview is unique in its way. For this text, I limit interview taxonomy on these three major groups. However, I could distinguish more groups by applying different parameters.

19 To exit an archive physically presupposes an 'exit interview.' With this, researchers gave feedback on their findings and express satisfaction with the quality of services. The most visible proof of this satisfaction is the acknowledgment in published works.

20 The number of requests and the average per month, but also many produced digital copies.

21 Emotional intelligence (EI) refers to the ability to perceive, control, and evaluate emotions. The ability to express and control emotions is essential, but so is the ability to understand, interpret, and respond to others' emotions. <https://www.verywellmind.com/what-is-emotional-intelligence-2795423> (25.01.2021)

toward on-site and 'invisible,' off-site researchers seeking information; b. responsibility to check if the researcher understands the rules and procedures; if he is properly using archival finding aids; responsibility to check if researchers exhausted all similar fonds for his/her research question; to share the knowledge about the information at other similar institutions; to demonstrate responsibility by checking if the researcher applies appropriate research strategy; c. commitment to share archival reference knowledge and thus to enlighten them with broader archival context. This activity also includes giving lectures and presentations, mentoring students, etc. Reference archivists must at any time be conscious of their responsibility toward researchers and always help them in finding and discovering new knowledge. Archivists, too, via researchers, establish responsibility toward community and society. Reference archivist listens and observes, acts and demonstrates, creates and provides, mentors and navigates – for the benefits of users. Archivists are increasingly exposed to users' questions and queries on access to online resources and digital platforms as never before during these pandemic days.²²

Archival reference knowledge, including archival emotional intelligence, are uniquely acquired during a more extended period. Because of these qualities, reference archivists became active players in designing outreach campaigns and in academia. Their activities include a. keeping contact with educational and research institutions, organizing lectures off and online, organizing pre-session events, open days, etc.; b. writing blogs, articles, and newsletters, designing website pages, promote social platforms, give interviews and prepare podcasts; c. mentoring researchers, interns, and volunteers; d. giving offline and online lectures and presentations, mentor university students to cooperate with faculty, and e. participate in public programs and similar events such as the exhibitions, etc. (OSA Annual Report, 2010).²³

6. CONCLUSION

The case study analysis showed that the institutional Reference Service of the Blinken Open Society Archives (OSA), since its formation in 1995, was playing a prominent role in assisting numerous students and researchers to obtain archival records needed to address their research questions. However, by servicing researchers the reference archivists actively participated in the knowledge production process that happened in the research room. The statistical data analysis illustrates the trend of constant development with important moments caused by external and internal factors that accelerated or slowed down free access to archives. Reference archivist meets users who pose sophisticated questions seeking precise and accurate answers. Also, a reference archivist needs to show archival and emotional intelligence, demonstrate competence over many professional areas, show stable orientation in historical periods, have good knowledge of archival fonds, and finally, to demonstrate skills inherent to a reference archivist.

Thus, archival research rooms became not just physical places where reference archivists are knowledge mediators between archival records and their users but also an area of lively intellectual interaction and sophisticated mediation. From inside the institution, reference archivists maintain a considerable archival knowledge of analog and

22 Research Cloud is a new online tool designed in 2020 for our students who study at the Viennese campus and who cannot come to research in Budapest's archives. Thus, the OSA Research Cloud provides remote access to digitized archival materials, which are usually available for examination only in Blinken OSA's physical Research Room and cannot be put online for copyright or privacy reasons. The Research Cloud Platform is designed at Microsoft Office 365 SharePoint platform.

23 <https://www.osaarchivum.org/files/page/420/583/rferep2010.pdf> (28.01.2021)

digital collections. However, at the same time, they actively participate in the process of the creation of new knowledge by active collaboration with historians and other users. Reference archivists have an essential role in directing users to the area of their research interest. They suggest sources because archivists are interested in their researchers' results as they are in the formation of new knowledge and cognition.

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Table 1: Research Room Statistic 2003 – 2020, - Blinken OSA, Statistical data from the Researchers Database

A	B	C	D	E	F	G	H	I	J
2003		213	1537	7,5	4,50			23800	6060
2004	223	323	1554	6,9	3,51	1446	6,5	11710	3740
2005	163	305	1326	6,7		624	4	9080	2889
2006	191	253	733	3,72		651	3,18	36918	2772
2007	181	231	590	3,08		514	2,75	22282	5655
2008	199	277	745	3,72	3,51	674	3,54	57033	2391
2009	204	286	693	3,41	3,39	627	3	26768	2844
2010	200	302	812	3,75	3,51	652	3,25	30850	22185
2011	219	340	1143	4,91	4,29	859	3,91	34442	2674
2012	215	362	1280	5,72	4,06	998	4,27	61504	3055
2013	208	379	1155	5,54		819	3,7	66856	3804
2014	219	430	1468	6,45	3,47	980	4,54	96792	3088
2015	217	416	1419	6,54	3,55	1022	4.72	67919	3420
2016	212	389	1373	6.18	3,57	935	4.09	53404	2934
2017	211	403	1361	6,36	4,07	1119	5,27	113290	5240
2018	212	415	1344	5,83	5,05	1071	5	74950	2312
2019	202	319	1161	5,7	4,37	924	4.1	99270	2937
2020	119	137	380	3.25	3:53	225	2.1	18657	884

Source: Blinken OSA's researchers Database, 2003-2020; OSA Annual Report, 2012.

A - years; B - days open in a year; C - new registered researchers; D - visit to research room; E - visits per year; F - average hours spent per researcher; G - # of requests; H - average # of requests per year; I - # of digital images produced; J - # of archival units/containers served. Empty space - data unavailable

Table 2: Number of New Registered Researchers and Number of Total Annual Visits in the Research Room, 2003 – 2020, Sources: Researchers Database, Blinken OSA

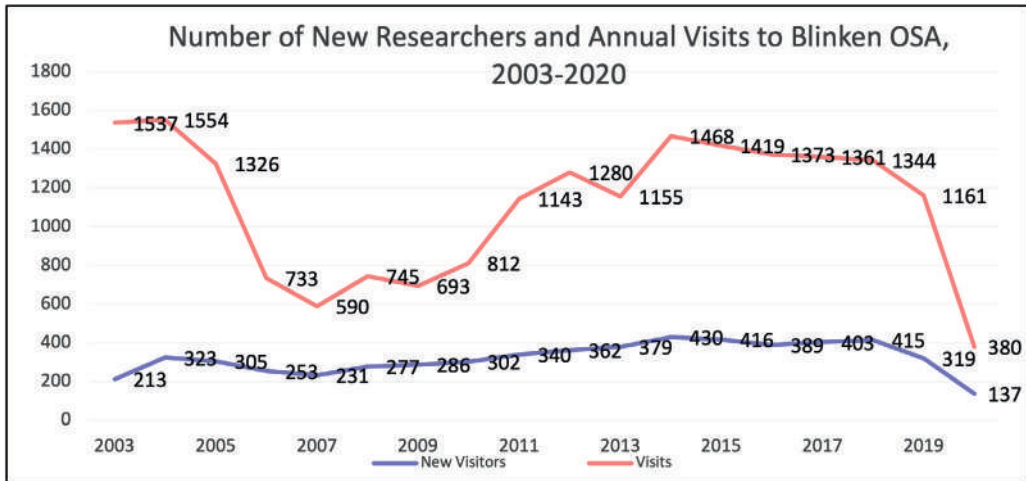
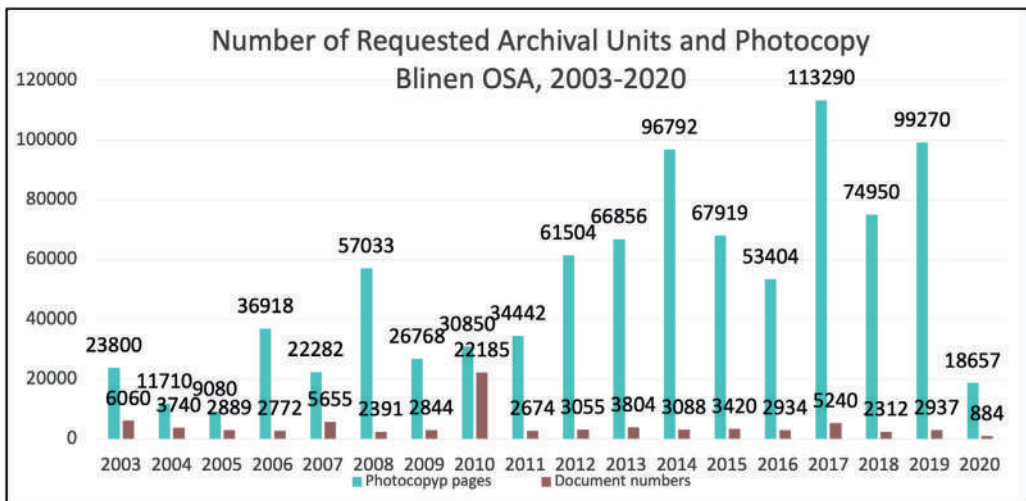


Table 3: Number of Registered Archival Units and Total Number of Reproductions (Xerox and Digital) Research Room 2003 – 2020, Sources: Researchers Database, Blinken OSA



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