Powys Cultural Services Digital Strategy StoriPowys



Search the Assets Delivery Strand Feasibility Study Report - Metadata Generation

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1. Executive Summary

Report Purpose

This report details the findings of the feasibility study, looking at how Powys Cultural Services can bring together the archive, museum collections, and local studies collections, to present the assets through a single collections platform and front-end interface to online users.

The research seeks to understand the current landscape of the archive and collections, including what metadata is available from previous digitisation and cataloguing; what thematic connections can be made across the archive and collections; what are the options for a single collections platform for Powys Cultural Services; and how these findings need to inform digitisation of the collections and metadata generation in the future.

The report provides the findings and details an implementation plan for working towards a searchable online collection platform for Cultural Services, both to encourage community engagement with the collections, but also attract a wider national and international audience to access the heritage and cultural offer from Powys.

Objectives

There are a number of key objectives underpinning the drive towards the development of a single collections platform and front-end interface:

- Showcase Powys Collections as one and engage both local people and those further afield to look at and interact with assets in the collections, for example to rate, share and comment
- Develop a common approach to keywording and generating metadata for front end search
- Explore commercialisation opportunities

Key Activity

This feasibility study seeks to:

- Baseline the current metadata approach across museums, the archive, and the local studies collections
- Identify relevant existing catalogue data that can be used to support front end online search
- Understand how additional keywording and emotional metadata might enhance search across the assets
- Investigate how the archive and collections can be presented as one
- Develop a sustainable implementation activity plan for developing a searchable database with information and images of items from across the range of collections and archives held by Powys Cultural Services

Overview

The report includes the following sections:

- Introduction
- The Different Collections
- Front End Metadata Pilot
- Metadata Generation Programme
- Implementation Plan
- Appendices

2.Introduction

The ambition to look across the archive, museum collections, and local library collections, to develop a common and sustainable approach to prepare collections materials for online use is core to realising the objectives of the recently formed Digital Strategy. During the development of the Digital Strategy, it became clear that maximising the efficient use of platforms and harmonising the exposure of collections and assets is an important area of development for Powys Cultural Services.

The 'Search the Assets' delivery strand of the Digital Strategy focuses on achieving this goal. Ultimately, this will support the service as they work towards achieving their digital aim to reach and engage with new and wider audiences, as well as seek to become more commercially sustainable as an organisation.

The feasibility study engages with the curators and archivists who work across the archive, museum collections, and local studies collections, to understand how the assets might be brought together and presented through a single interface.

The Current Landscape in Powys

There are a wide range of collections housed within Powys' four museums and the archives as well as local studies collections held in some of the county's libraries. The collections are catalogued and managed by:

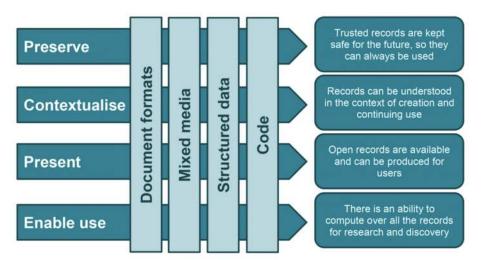
- Powys Archives
- Llanidloes Museum
- y Gaer
- Y Lanfa Museum
- Trysorau Maldwyn, Newtown Library: For the purposes of this feasibility study, Newtown Library's local studies collection has been involved

Over the years, elements of the collections have been made accessible via collaborations and involvement with several projects, including <u>People's Collection Wales</u>. There have also been commercial partnerships formed with collection items being made available on <u>Art UK</u>

Across the different organisations and collections there has been a range of approaches to cataloguing, metadata generation and storing digitised files. The metadata associated with assets from across the collections will become increasingly important as Powys Cultural Services seeks to open-up their collections to a wider digital audience. There are several areas that will need to be addressed as collections are catalogued and digitised going forwards. This feasibility study identifies the areas of activity that will need to be undertaken and these are encapsulated in the Metadata Generation Programme and Implementation Plan.

Why is metadata important?

Traditional archives and collections management processes have been focused on preserving, contextualising, and presenting collections. The National Archives Digital Strategy highlights the emerging fourth strand, which is to 'Enable use' of collections.



There are four categories for the value the digital archive offers its users

Image: The National Archives Digital Strategy

Enabling use and interaction with collections can only be achieved through the generation of metadata to aid front end search and discovery. Generating metadata for online search is a challenge being addressed internationally across museum, archive, and library sectors.

Traditionally, museums and archives have captured primary metadata as they catalogue their collections. Primary metadata has always been a useful cataloguing tool for archivists and curators, including the capture of information such as file names and file types; format; size and dimensions; resolution.

Increasingly, secondary metadata is captured to describe an object or asset, including fields such as references; descriptions; covering dates. Secondary metadata is often referred to as descriptive metadata and is typically used as information to search and locate an object, including fields such as subjects, keywords, publisher. The Society of American Archivists also describes descriptive metadata as suggestive of an object's 'aboutness'.

As digital technologies have grown and users' digital expectations have evolved, secondary and descriptive metadata are increasingly being added to a digitised asset to aid online search and discovery. An extension of this is referred to as tertiary or 'emotional metadata'.

Without a combination of these types of metadata, searching and finding an asset online is very difficult and proves challenging both for the organisation to widen access and for the user to return any meaningful searches of collection data.

It is vital that these forms of metadata are fit for the demands of a contemporary digital experience. Whilst data may suit the internal needs of an organisation, it must also meet the expectations of digitally savvy users.

In the past, cataloguing processes across the museums and the archive at Powys have focused on collecting metadata to support the catalogue of the item. A brief description of the item/object is included. There is limited metadata available to enable assets to be presented online for users to search and explore (see Section 3)

The British Library's Collections Metadata Strategy 'Foundations for the Future' is an ambitious vision of ensuring that by 2023 the "Library's collection metadata assets will be unified on a single, sustainable, standards-based infrastructure offering improved options for access, collaboration and open reuse".

There are several areas that the British Library's strategy addresses which are useful to inform Powys' longer-term goals of opening-up as much of the collections as possible for front end search. Most notably, the British Library Strategy includes two areas of relevance:

Improving Visibility - If collection metadata is unavailable, the resources described are effectively invisible. A programme of metadata creation is required to improve visibility of any 'hidden' content and enable use.

New Metadata Creation Options -The changing information landscape presents many new opportunities. Open web resources, automated metadata generation from full text and crowdsourcing offer interesting possibilities requiring exploration.

A proposed metadata generation programme is outlined in Section 5, that seeks to use the resources available to Powys at present, as well as explore other options to produce metadata in the longer term.

3. The Different Collections

Detailed analysis of assets and metadata

The feasibility study undertook to:

- Establish the current storage and infrastructure set up for the different collections
- Ascertain a typical picture of what metadata has been catalogued, including metadata formats and standards
- Review sample sets of metadata

Storage and Infrastructure

The four museums are all using Modes to catalogue and manage their collections. Each museum has a separate Modes instance. Until recently, each museum collection had worked in isolation to develop a metadata structure for cataloguing. Work is underway to agree and coordinate a consistent approach to cataloguing using a common set of keywords across all four museums. Digitised assets are either stored on SharePoint or locally at the museums on hard drives.

The archive uses CALM to catalogue the collections, with Calmview available to users as front-end access to search the catalogue.

In the Local Studies Collections, where the item is a book, these are catalogued on the Library Management System. The cataloguing of other assets such as images, maps and ephemera has been dependent on resource and not catalogued in one place.

Metadata

All museums capture Collection and Item level information. For item level, typically the following primary metadata fields are captured: Object title; Description; Date (where known) and Location (i.e., where the item is in the store).

In addition, some of the collections and items have other primary metadata and some secondary metadata information including accession number, acquisition i.e., owner/gifted by, condition, size, material, condition, keywords. This information is largely dependent on when the items were deposited in the collection and how the items were catalogued.

In the Archives, metadata is captured at both the collection and item level. Typically, the following primary metadata and limited secondary metadata is available:

- Collection Level: Title, Reference Number, Date (where known), Description, Subject (keywords), Appraisal, Arrangements, Access Conditions, Finding Aids
- Item Level: Title, Reference Number, Date, Access Conditions

Sample Metadata

A range of sample metadata was provided during the feasibility study. See Appendix A for sample database extracts. The metadata demonstrated the areas where additional metadata will be required to support front-end search.

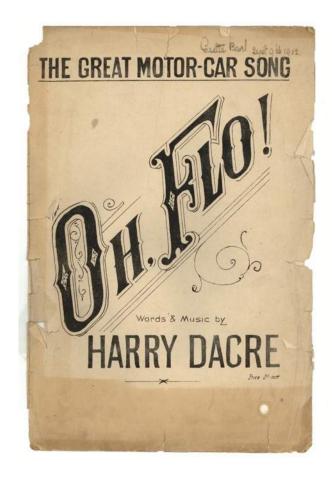
The Museum Collections

y Gaer

y Gaer's collections, previously the Brecknock Museum and Art Gallery Collections, are the most advanced in terms of cataloguing. A significant amount of cataloguing in Modes was achieved whilst the new building was being developed and the organisation was closed to the public.

In summary, y Gaer has:

- Collections from prehistory through to the modern-day covering archaeology, contemporary art, historic art, social history, and natural history.
- Approximately 36,000 records on Modes
- About two thirds of these records, 20,000, have digitised images attached to the metadata
- All digitised items have a high-res tiff, with low-res ipegs are stored on SharePoint
- Each tiff is associated with its relevant accession number
- 115 oil and acrylic paintings in the collection are photographed and available on Art UK
- In addition, there are several hundred digital labels for all objects in museum stored on separate system - these are 50 word descriptions in both English and Welsh to give context of the object for museum visitors
- At present no keywording is done when cataloguing an asset







Radnorshire's Collection

- Radnorshire Museum collections date from prehistory through to the modern day and include items focused on archaeology, palaeontology, natural history, military history, and social history
- There are 8,000 records in Modes, from a total of approximately 36,000 objects
- A project called Rediscovering Radnorshire, is enabling an audit of the whole store to take place
- As items are catalogued, images of the objects, artefacts and assets are being captured at the same time
- At present much of this metadata is in an excel spreadsheet ready to go onto Modes
- Digital image files are stored on SharePoint





Y Lanfa and Llanidloes Museum Collections

- The Montgomeryshire collections consist of those housed at Y Lanfa Powysland and Llanidloes
- Y Lanfa's collections include prehistoric items
 through to Ancient Romans and to the early
 Medieval period. They also include history about
 the area, for example trades, pubs and the railway,
 as well as Laura Ashley, displays about the wars
 and the Montgomeryshire Yeomanry.
- Y Lanfa has 22,000 records in modes and 80% photographed but generally these are poor quality images taken around 2005 and not really viable for interrogation via a front-end interface
- Llanidloes collections include items about major events and development of Llanidloes during the last three centuries capturing civic history, local trade, and tourism as well as the mining and woollen industries.
- Llanidloes has 17,000 records captured in Modes but only 2% of these are photographed
- An object's location is not stored
- Newer items of the collection that are being catalogued are going straight into Modes, but there are some items which are stored offline
- 10% of the collection is on display and the rest is in store
- Digital image files are stored on USB drive and OneDrive



Image: From Y Lanfa Museum

Commercial Return for Museums

Monthly research enquires to each museum about their collections are in single figures. The museums tend not to charge for research enquiries, and sometimes charge for a digitised image.



Image: From Llanidloes Museum

Powys Archive

- Collections date from the fourteenth century
- Highlights in the collection include documentation capturing the developments of the Elan Valley, militia records mostly for the Napoleonic period, police charge books, war time letters.
- The archive holds approximately 95,000 items in the CALM catalogue
- Less than 5% of the catalogue is scanned
- Items are generally digitised in response to a request, but are not professional quality images



The archives offer a research Service and copying service. Public enquiries amount to several thousand per year, with charges at £20 per 30 mins and for prints and scan.









Local Studies Collections

Trysorau Maldwyn, Newtown Library

Newtown Library holds the Local Studies Collection for Montgomeryshire, with both reference and lending books. Other items in the collection include newspapers, maps, ephemera, images, and media. Most of the collection is in book form therefore available on the library management system/catalogue.

The areas of the collection which are not on the library. Management system are:

- Newspapers on a mixture of bound copies and microfilm.
- Maps for example A full set of 6" and 2500 series for Montgomeryshire
- Ephemera including a small number of WI scrapbooks
- Images photographs and postcards
- Media oral histories and other recordings on cassette
- Trade Directories on microfiche

4. Front end metadata - Pilot

Preparing collections for front end search

The feasibility study has identified five key areas that will need to be addressed in the generation of a future set of metadata for the collections, to open-up assets online and enable search. Developing a structured and consistent approach to metadata generation across the museums, archive and libraries will be core to the success.

Systems

The use of the back-end systems needs to be harmonised, as assets and items are catalogued. Common metadata structures and naming conventions should be aligned. See 'search and standards'.

Geography

Whilst Powys' museums, archives and local collections conserve the metadata they have and generate new records to professionally recognised standards, it is within the framework required within their very local institution. An asset in an institution has no reason to record its geographical location within the county or country. The index isn't likely to say if the asset is in a museum or an archive because the archivist knows where it is.

Similarly, the metadata record itself works perfectly in the context of its institution, both in terms of its medium which is as likely to be paper or card as well as electronic. The record's fields of metadata will be consistent with all the other records of the institution, but not necessarily any continuity with other county institutions.

Taken away from this 'hyper local' setting, the record of metadata will have inadequacies which prevent front end search in the open digital environment.

The challenge is to widen the record for each asset so that it's searchable in a whole Powys context and so that links can be established between institutions and sectors to provide a Powys wide searchable set of metadata and assets, with a continuity of results irrespective of where an asset may be housed.

Digital User Expectations

User expectations are based on our everyday search engine experiences where you can find anything that is available digitally, from anywhere in the world. In the digital landscape, exposure of an asset through meaningful metadata is key so that web crawlers will find, copy, and index assets ready to prioritise them in page rank. Continuity within metadata creates continuity in digital searches which is irrespective of, for example, position in the world or ownership.

User expectations extend to being able to interrogate or purchase an asset, in the museum, archive and library sectors, perhaps as a file or a facsimile. This requires the asset to be born digital or to be digitised or to have a facsimile digitised which will act as a good proxy in the digital environment.

Search and Standards

A common set of standards will need to underpin future metadata generation, supporting staff as they prepare the collection. Inconsistent standards mean it is very difficult to offer a coherent user experience. A uniform approach to the creation of metadata will inform the work of staff and volunteers. Developing a structured and consistent approach to creating metadata gives all the museum, archive and library institutions in Powys equality of access to the digital landscape. For web crawlers to observe and promote Powys' assets and to recognise a continuity in and across the county:

- A consistency of approach is essential, every asset must be clearly tagged using an agreed semantic tree of keywords (descriptive metadata)
- Collaboration will be needed to decide on rights management, permissions, and licensing

Resource

A common and consistent approach to metadata generation will allow staff and volunteer resources to be focused and prioritised. Section 5 looks at the development of a Metadata Generation Programme to inform future workflows.

Thematic Strands

A series of workshops and discussions held with the Search the Assets project steering group, identified several thematic strands that were cross cutting across the archive, museum collections, and the local studies collections. See Appendix B for the kick off workshop agenda and areas of discussion.

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These thematic strands broadly fell into two types:

1. Grouping the collections based on 'special interest' themes

Special Interest Theme About a person, place or specific focus/event

Adeline Patti - Singer / Entertainer. Travelled the world (connections in the collection to Canada, America and France). Collections includes her letters and photos

RMS Lusitania

Textiles - Pryce Jones - link / extension from Local Textile Museum

Talgarth Mental Asylum Records - Mental Health / Well-being link

Laura Ashley Collection

Log boats (ref longer term connection to 3D scanning project)

Suffragettes

Literary Associations - i.e. Arthur Conan Doyle, J.M.Barrie

The Workhouses

2. Grouping the collections based on a county wide theme

County wide theme Exposing assets across Powys

General Interest - Commerce, Shopping, Pastimes, Agriculture, Industry, Railways, Transport, Archaeology

Historical / Educational - WWI / WWII - Books of remembrance, Memorial Board, lists of those who served in the War

Social History - schools, the high street,

Fashion Focus - coins, jewellery (inc. gold rings), shoes (i.e., late 18th Century pair) etc

Celebrating Welshness i.e., Wooden Collection Chapel Boxes

Selection for Pilot

Following the workshop, two themes were agreed to be used for a front-end pilot:

- Adelina Patty: a focus on the international singer and entertainer, collection material held at y Gaer, and will allow exploration of a large data set and different formats
- Past Times: a look across all collections at activities and events across Powys

All staff were invited to contirbute to an online survey, which included a request for ideas for the Past Times theme. Staff fed back and suggested content for the theme, including parlour games; leisure activities such as the passion for outdoor sports in history - cycling, motorcycling, crocket, lawn tennis and archery; Eisteddfod; women in sport.

The Project Team identified a trial set of assets from each organisation for these two pilot themes.

Current metadata was extracted from Modes and Calm into a common .csv format.

Additional metadata – namely key words and emotional metadata was produced for the pilot assets.

Images: A selection of assets for the Past Times theme

















Powys Cultural Services: Digital Strategy: Search the Assets: Feasibility Study April 2022

5. Metadata Generation Programme

A metadata generation programme will support Powys Cultural Services to develop additional secondary and emotional data about the collections. The programme seeks to:

- A. Define a metadata generation process using volunteers and technology alongside staff
- B. Communicate a structured and coherent plan for the digitisation of paper-born assets and the production of their associated metadata
- C. Establish a practical and sustainable metadata process for museum, archives, and library local studies collections

A. Definition

Objective: To define and agree new metadata fields for front end search.

Current Status: The feasibility study has identified two areas of focus:

- i. develop common and consistent set of keywords for all collections
- ii. develop structure for emotional metadata tagging of assets

The pilot will be used to try out some sample metadata and the review of outputs will inform a longer-term addition of metadata.

B. Communications

Objective: To ensure the success of the Search the Assets objectives and implementation plan, a regular communications plan will be required both to support the Project Team but also to ensure the wider Cultural Services team are kept informed of the project stages and outputs.

Current Status: A staff survey shared as part of the Feasibility Study, invited feedback on the Past Times pilot theme, the concept of emotional metadata, and requested ideas for the longer-term delivery of the 'Search the Assets' digital strategy strand. The Roadmap in Section 6 indicates an ongoing series of communications to all staff.

C.Process

Objective: To develop a process for preparing secondary and tertiary metadata.

Current Status: Sample metadata will be evaluated as part of the pilot, based on a proposed workflow. In summary this workflow will include the following steps:



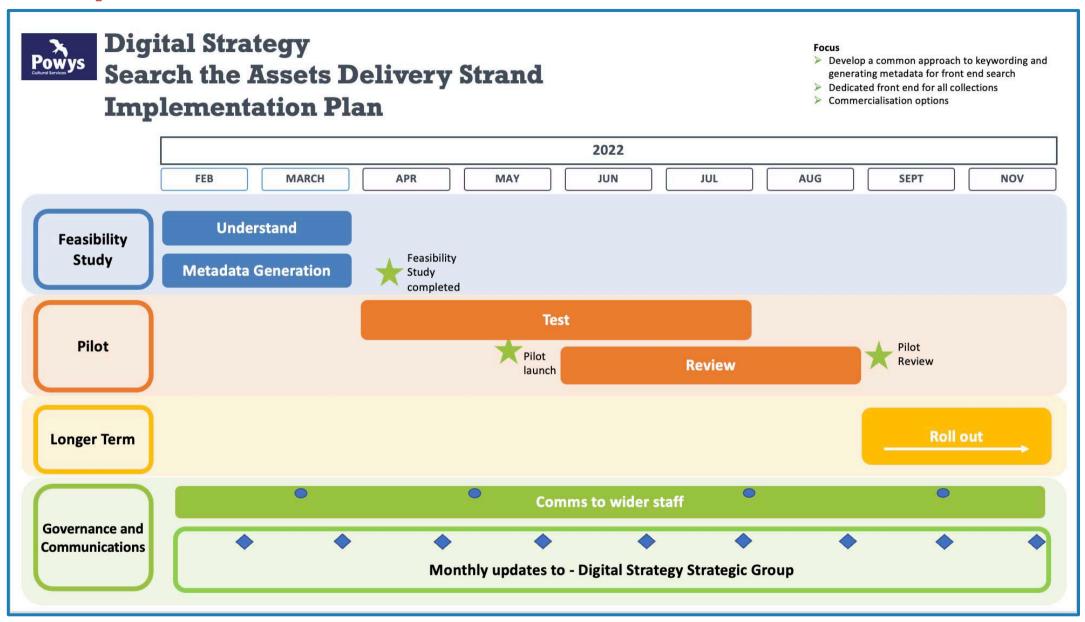
Ongoing success in putting the collections online, will require adoption and maintenance of best practice by staff including curators, archivists, and volunteers. Following the pilot, further guidance will be developed including agreed standards and an updated workflow. Skills development may be required for a wider team of staff to participate, and this will be assessed at the end of the pilot phase.

6.Implementation Plan

Programme of activity

Activity Focus		Description	Date	Status				
Feasibility Study								
		Establish Search the Assets Project Steering Group	February 2022	Completed				
_	ıta ent	Understand current metadata across all collections and identify common fields	February/March 2022	Completed				
Understand	Metadata Assessment	Assess gaps of current metadata against fields required for front end search	February/March 2022	Completed				
lerst		Agree additional metadata fields for pilot of front-end search i.e., keywords	February/March 2022	Completed				
Unc	Themes	Identify potential cross cutting themes across the different collections and archive	February/March 2022	Completed				
	Ther	Review and agree 'quick win' options for front end pilot	February/March 2022	Completed				
	•	Research front end interface options	February/March 2022	Completed				
data ation	Content Preparation for Pilot	Prepare Metadata for pilot themes	March/April 2022	Completed				
Metadata Generation		Addition of keywording and emotional metadata to pilot content	March/April 2022	Completed				
Pilot								
	Pilot interface set up	Front end interface set up	April/May 2022					
		Definition of search fields for front end	April/May 2022					
Test		Pilot content uploaded and linked to front end interface	May 2022					
·	Test	Technical testing	May 2022					
		User testing	May/June 2022					
»	Assess	Collate and review pilot outcomes	Summer 2022					
Review		Assess if extension of pilot content and testing is required	Summer 2022					
<u> </u>		Review Metadata Generation Workflow	Summer 2022					
Longer Term								
ut		Define common key wording approach across collections (based on Pilot outcomes)	Autumn 2022					
Roll Out		Align production of front-end metadata with cataloguing process	Autumn 2022					
Ro		Review proposed Digitisation plan and prioritise ongoing digitisation and cataloguing plan	Autumn 2022					

Roadmap



Indicative Costs

Following the review of the collection platform options, indicative costs are highlighted. Budgeting needs to include both set up costs as well as ongoing annual license and hosting fees.

Item	Description	Estimated Cost
Set-up	Database and front end set up of core	£5,000
	collections platform	
Image Upload – up to	Processing of images from Modes/CALM	£1,000
10,000 items	to collections platform	
Metadata Spreadsheet	Preparation of metadata spreadsheet for	£500
Upload	upload into platform	
Additional Functionality	User contribution feature, display of	£5,000
	assets via a map, bespoke design of	
	additional pages	
Annual License Fee	Anticipated fee for ongoing use of	£1,200 - £2,000
	platform	(range dependent on
	Range dependent on functionality	functionality)
Annual Hosting Fee	Estimated hosting fee	£500-£1,000

Conclusion

The feasibility report records strong indications that the development of a single collections platform and a front-end interface will be practical and will benefit to Powys Cultural Services. The suggested activity will provide a replicable model for similar counties enhancing Powys' reputation as a major innovator in cultural services. More than this, the objectives proposed can be realised, since metadata generation will showcase collections, enable digital engagement, and support commercialisation in the medium future.

Since the application of common approaches to both front-end and back-end technologies is at the centre of this digital proposal, there will be fringe benefits to the geographically distanced institutions across the county. The common digital voice will catalyse Cultural Services to be seen as a single entity, supplanted on its constituent parts, and enabling StoriPowys to service the needs of the digital age.

7. Appendices

Appendix A

Current Museum and Archives Metadata – Modes and CALM sample extracts

Appendix B

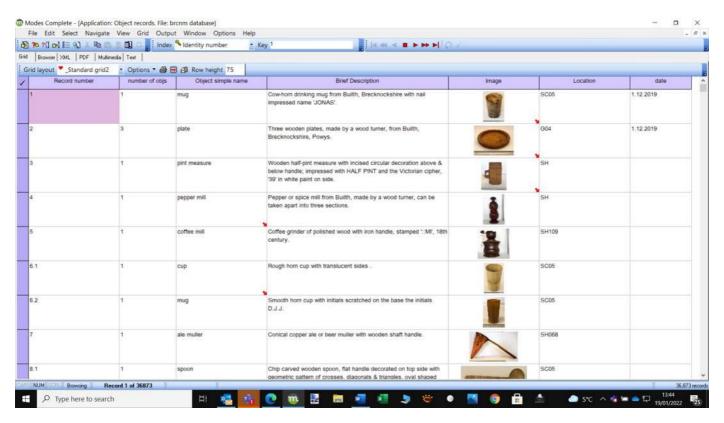
Stakeholders kick off workshop – agenda and slides

Appendix C

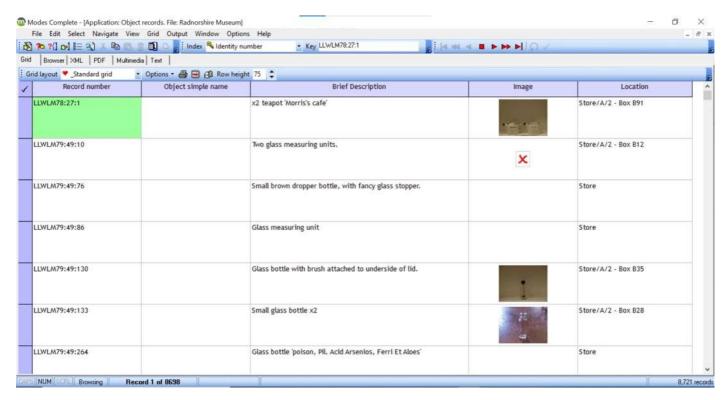
Dedicated collection platform options

Appendix A

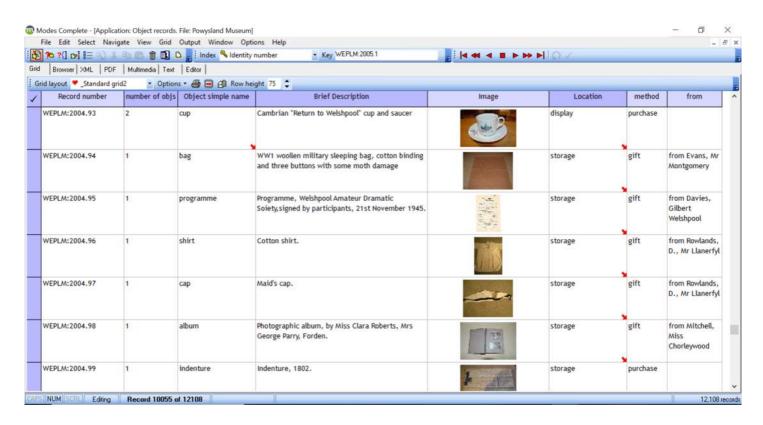
1. Modes Extract: y Gaer



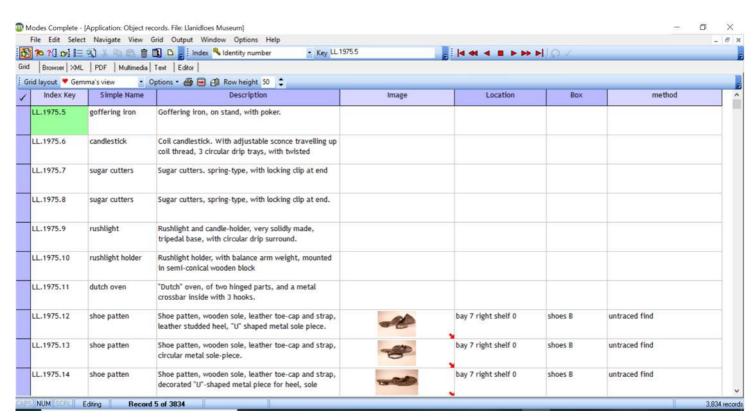
2. Modes Extract: Radnorshire



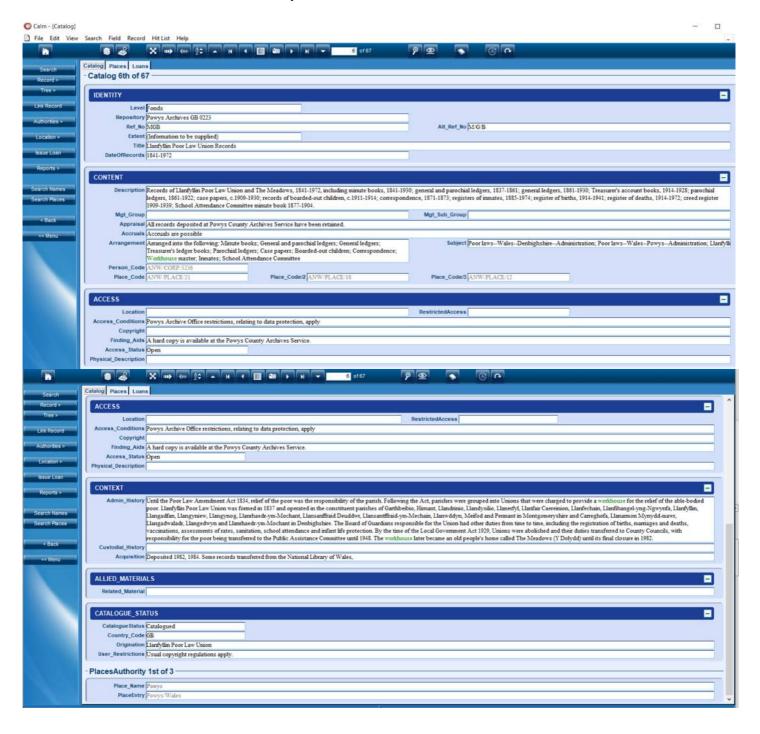
3. Modes Extract: Y Lanfa



4. Modes Extract: Llanidloes



5. CALM Extract – Collection Level: Powys Archives



6. CALM Extract - Item Level: Powys Archives



Appendix B

Stakeholders kick off workshop – agenda and slides. See separate document titled: Powys CC Search the Assets Workshop 20220211.pdf

Appendix C

Desk-based research into the options for a dedicated collections platform and front-end interface

Name	Туре	URL	Description
iBase	Software	https://www.ibase.com/home?WINID=1649854200563	Digital asset management system that enables museums, galleries heritage and art to share images, videos, audio files and books. Includes payment integration.
Gallery Systems	Software	https://www.gallerysyste ms.com/solutions/online- collections/	eMuseum is an online tool for museums to integrate with CMS. Institutions can create dynamic exhibitions and integrate with website.
Omeka S	Software	https://omeka.org/s/the mes/foundation/	Web publishing platform for institutions interested in connecting digital cultural heritage collections with other resources online. Open source.
The Exhibit	Exhibition Tool	https://blog.theexhibit.io /for-cultural-institutions/	The Exhibit is purpose built for publishing complete exhibitions online. They enable galleries, museums and other cultural institutions to cost-effectively publish exhibitions online.
Lucidea Archives Collections Management	Collections Management Software with front end interface	https://lucidea.com/archivera-archives-collections-management-software/	ArchivEra delivers features like workflows that map to archivists' requirements, easy finding aid generation, adherence to archival standards (ISAD(G), DACS, RAD, Dublin Core, EAD3), email integration for automated research request database creation, and an integrated portal to inform, educate and delight virtual visitors.
CollectionBuilder	Software	https://collectionbuilder.github.io/	CollectionBuilder is an open-source tool for creating digital collection and exhibit websites that are driven by metadata and powered by modern static web technology
Corals	Collections Platform	https://corals.photos/ Example interface: https://brumphotoarchive .co.uk/	Corals is a photo sharing platform specifically designed for museums, archives, libraries. Focus is allowing archives and museums to make collections more accessible to digital audiences.