Turn Your Finding Aid into a Shopping Cart

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The challenges archives face in managing manual submissions of requests to view materials include tracking physical copies of call slips, organizing email from patrons, and ensuring accurate and sufficient information is received from researchers to retrieve the appropriate materials. While online finding aids improve collection awareness, strengthen scholarly access, and enhance research methodology, they also present drawbacks pertaining to collection and object referencing.

An automated mechanism to submit and track research requests would ease these difficulties. But can a repository with limited staff and financial resources realize this? One of the perceived hindrances to automating circulation records is how data is stored. In the absence of an associated database, some repositories still maintain finding aids as word processing, HTML, or XML documents. Thus, I went on a search for a solution to automating research requests that would work directly with an EAD- or HTML-encoded finding aid.

The answer proved to be fairly simple: create a shopping cart. An eCommerce shopping cart is a tool for patrons to select items on a website, add them to a list (better known as a cart), and submit a formatted request for obtaining them. Because cart data is structured and pre-defined, it is easy to retrieve items and track orders.

Many free, customizable eCommerce scripts and tools are available online and can be tailored to an institution's website. One open source option, simpleCart, integrates directly with an XML or HTML document. As proof-of-concept, I applied simpleCart to an EAD-encoded container list, treating described folders and materials as "shelf items." By performing a few find-and-replace maneuvers to markup an encoded finding aid, and editing the CSS to provide space for displaying cart items, I achieved a functional shopping cart in minutes. Adding a few lines of JavaScript and PHP code allowed the form to be submitted via email. A project sample and documentation of this process is available at http://www.allisonjai.com/EAD.html. Thanks to the open source community, there are ample tutorials on sending simpleCart data to a database.

Customizations in how data is structured, displayed, shared, and stored abound. The results of these possibilities are endless: for example, computer generated call slips, reports about usage and circulation statistics, and tracking researcher histories. By working slightly outside of the box and using an open source tool designed for a different industry, a repository can quickly, easily, and inexpensively automate user selection and request for materials from a finding aid.