

Collection Control with ArchivesSpace

...

Make the system work for you, not the other way around

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Session Goals

- For users to be excited about the possibilities of ArchivesSpace supporting better collection control
- For users to hear *tons!* of use cases and to share their own. We especially want to extend these use cases to think about how it will ultimately affect the user experience.
- For users to have ideas about how to remediate existing data to make it compatible with collection control functions that are manageable with their existing operations and workflows.
- To start a toolbox of fixes to get our data into shape, and strengthen a community of practice in our profession.

Our institutions and local practices may differ, but many of us are dealing with similar issues with regards to our legacy data. We can learn from each other and build upon existing work.

Your situation

How many of you have used “manage top containers”?

How many of you have created container profiles?

How many of you have used container profile data to write reports or solve problems?

How many of you assign locations in ArchivesSpace?

How many of you have used location profiles?

How many of you have applied machine-actionable restriction information?

What are your collection control pain points?

- Missing boxes
- Bad/too vague/mysterious?? box locations
- Accidentally giving restricted materials to patrons
- Not having space for incoming collections
- Existing shelving doesn't accommodate materials
- Managing and providing access to digital surrogates
- SPREADSHEETS EVERYWHERE
- “Iterative migration”
- Data entry mistakes
- Bulk operations
- Orphaned materials removed from their collections

Container Management

“I’m moving two entire rows of stacks so that a light can be repaired, and I need to know how many cubic feet they will occupy during moving and temporary storage.”

“I suspect many items in my oversize boxes do not need to be in such big boxes and may be getting damaged because of inappropriate housing. How can I find all of these boxes easily so that I can survey and rehouse them?”

“I am performing a survey of our audiovisual materials to determine digitization priorities, and need to know how much material we have in each format”

“As a reference archivist, I want to know which collections have microfilm surrogates, and which parts of the collections are on each reel of film”

- Basic Information >
- Dates >
- Instances >

Basic Information

Title Correspondence

Ref ID ref11

Level of Description File

Publish? True

Has Unpublished Ancestor? False

Created by admin 2015-06-01 22:20:57 -0400, Last Modified by amd243 2017-05-25 11:42:10 -0400

Dates

> Creation 1881-1926, undated

Instances

> Mixed Materials 1: [39002042256900]

> Mixed Materials Reel 1 U: [39002112737789]



Container Information

Active Restrictions

Linked Records

Linked Records

Go to Search Results

Showing 1 - 4 of 4 Results

Sort by: Select

Record Type	Title	Identifier	
Archival Object	Correspondence, 1881-1926, undated		<p>Created by admin 2015-06-01 22:20:57 -0400</p> <p>Last Modified by amd243 2017-05-25 11:42:10 -0400</p> <p>View Edit</p>
Archival Object	Typescript and printed material concerning China, 1908-1913, undated		<p>Created by admin 2015-06-01 22:20:58 -0400</p> <p>Last Modified by amd243 2017-05-25 11:42:11 -0400</p> <p>View Edit</p>
Archival Object	Newspaper clippings, 1906-1929, undated		<p>Created by admin 2015-06-01 22:20:58 -0400</p> <p>Last Modified by amd243 2017-05-25 11:42:11 -0400</p> <p>View Edit</p>
Archival Object	Photographs, [ca. 1870]-1922, undated		<p>Created by admin 2015-06-01 22:20:58 -0400</p> <p>Last Modified by amd243 2017-05-25 11:42:11 -0400</p> <p>View Edit</p>

- [Container Information](#)
- [Active Restrictions](#)
- [Linked Records](#)

Record Type	Title	Identifier	View	Edit
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Archival Object	Newspaper clippings, 1906-1929, undated		Created by admin 2015-06-01 22:20:58 -0400 Last Modified by amd243 2017-05-25 11:42:11 -0400	View Edit
Archival Object	Photographs, [ca. 1870]-1922, undated		Created by admin 2015-06-01 22:20:58 -0400 Last Modified by amd243 2017-05-25 11:42:11 -0400	View Edit
Archival Object	Microfilm		Created by admin 2015-06-02 07:05:59 -0400 Last Modified by mac93 2016-08-30 14:51:52 -0400	View Edit

Machine-Actionable Restrictions

“I want my colleagues and researchers to be able to tell which boxes contain restricted materials, why they are restricted, and for how long. I don't want anyone to make paging mistakes.”

- Basic Information
- Dates 1
- Extents
- Agent Links
- Subjects**
- Notes 1
- External Documents
- Rights Statements
- Instances 1

[Save Archival Object](#)

Notes

Multipart Note

Persistent ID: e285c0ad14205e4dd3e383d006de7583

Label: [Empty]

Type * **Conditions Governing Access**

Publish?

Restriction Begin: [Empty]

Restriction End: 01-01-2020

- Local Access Restriction Type
- 1 - Donor/university imposed access restriction
 - 2 - Repository imposed access restriction
 - 3 - Restricted fragile
 - 4 - Restricted in-process
 - 5 - Other

Hold down CTRL (Windows) / Command (Mac) to select multiple options or deselect an option

Sub Notes

Add Sub Note

Text

Content *

In accordance with the terms of the donor agreement for this collection, correspondence is closed to research until January 1, 2020.

Mixed Content Enabled -- Type '-' for elements or highlight text to wrap

The parts of a conditions governing access subrecord

For machines:

- Restriction begin date
- Restriction end date
- Non-time bound restriction type

For people:

- Conditions governing access subnote ([DACS 4.1](#) and [ICA's Principles of Access to Archives](#))

We **always** write for people -- we write for machines when it's relevant.

- Container Information
- Active Restrictions
- Linked Records

Delete

Box 1 Top Container

Indicator 1
 Container Type box
 Exported to ILS Not exported

Active Restrictions

Linked Record	Note Type	Restriction Begin	Restriction End	Local Access Restriction Type
Correspondence: U.S. Brewers Association; Iowa Wholesale Beer Distributors Association; Gene Kennedy (Chairman, CCELU)	Conditions Governing Access		2020-01-01	

Linked Records

Showing 1 - 7 of 7 Results

Sort by: Select

Record Type	Title	Identifier
Archival Object	Newspaper advertising, 1978, undated	<p>Created by admin 2017-07-18 08:39:54 -0700</p> <p>Last Modified by admin 2017-07-18 08:39:54 -0700</p>

Go to Search Results

“As the University Archivist, I need to know what collections have restricted materials that expire at the end of this academic year.”

“I’m crunched for space and want to send everything restricted to researchers offsite; how do I find all of these boxes without going through every collection or collection file?”

“I have lots of legacy conditions governing access statements, and I don’t want to update them one-by-one. What are my options?”

	Column	resource_id	archival_object_	note_id	note_json
1.	http://prodaspaces.library.yale.edu:8080/resources/1948/edid#tree:archival_object_761698	1948	761698	241078	{\"jsonmodel_type\":\"note_multipart\",\"label\":\"Conditions 2016\\\\n\\\\n\", \"jsonmodel_type\":\"note_text\", \"publish\":true,
2.	http://prodaspaces.library.yale.edu:8080/resources/2095/edid#tree:archival_object_785139	2095	785139	242217	{\"jsonmodel_type\":\"note_multipart\",\"label\":\"Conditions 2016\\\\n\\\\n\", \"jsonmodel_type\":\"note_text\", \"publish\":true,
3.	http://prodaspaces.library.yale.edu:8080/resources/2421/edid#tree:archival_object_792924	2421	792924	244959	{\"jsonmodel_type\":\"note_multipart\",\"label\":\"Conditions 2016\\\\n\\\\n\", \"jsonmodel_type\":\"note_text\", \"publish\":true,
4.	http://prodaspaces.library.yale.edu:8080/resources/2421/edid#tree:archival_object_792925	2421	792925	244960	{\"jsonmodel_type\":\"note_multipart\",\"label\":\"Conditions 2016\\\\n\\\\n\", \"jsonmodel_type\":\"note_text\", \"publish\":true,
5.	http://prodaspaces.library.yale.edu:8080/resources/2652/edid#tree:archival_object_823082	2652	823082	248746	{\"jsonmodel_type\":\"note_multipart\",\"label\":\"Conditions 2016\\\\n\\\\n\", \"jsonmodel_type\":\"note_text\", \"publish\":true,
6.	http://prodaspaces.library.yale.edu:8080/resources/2661/edid#tree:archival_object_825174	2661	825174	248853	{\"jsonmodel_type\":\"note_multipart\",\"label\":\"Conditions 2016\\\\n\\\\n\", \"jsonmodel_type\":\"note_text\", \"publish\":true,
7.	http://prodaspaces.library.yale.edu:8080/resources/2661/edid#tree:archival_object_825196	2661	825196	248854	{\"jsonmodel_type\":\"note_multipart\",\"label\":\"Conditions 2016\\\\n\\\\n\", \"jsonmodel_type\":\"note_text\", \"publish\":true,
8.	http://prodaspaces.library.yale.edu:8080/resources/2661/edid#tree:archival_object_825205	2661	825205	248855	{\"jsonmodel_type\":\"note_multipart\",\"label\":\"Conditions 2016\\\\n\\\\n\", \"jsonmodel_type\":\"note_text\", \"publish\":true,
9.	http://prodaspaces.library.yale.edu:8080/resources/2661/edid#tree:archival_object_825247	2661	825247	248856	{\"jsonmodel_type\":\"note_multipart\",\"label\":\"Conditions 2016\\\\n\\\\n\", \"jsonmodel_type\":\"note_text\", \"publish\":true,
10.	http://prodaspaces.library.yale.edu:8080/resources/2666/edid#tree:archival_object_828244	2666	828244	248962	{\"jsonmodel_type\":\"note_multipart\",\"label\":\"Conditions 2016\\\\n\\\\n\", \"jsonmodel_type\":\"note_text\", \"publish\":true,

Using facets and filters
 Use facets and filters to select subsets of your data to act on. Choose facet and filter methods from the menus at the top of each data column.

Not sure how to get started?
[Watch these screencasts](#)

Using facets and filters to select subsets of your data to act on. Choose facet and filter methods from the menus at the top of each data column.

Not sure how to get started? [Watch these screencasts](#)

note_text	restrictionContent
{ "jsonmodel_type": "note_multipart", "label": "Conditions Governing Access note", "subnotes": [{"content": "Restricted until Jan 1, 2016"}], "jsonmodel_type": "note_text", "publish": true, "subnote_guid": "9e5b29a6b8490487a6f894080b14c"}, {"type": "accessrestrict", "persistent_id": "12ceafda46472d5175882765383a717"} }	Restricted until Jan 1, 2016
{ "jsonmodel_type": "note_multipart", "label": "Conditions Governing Access note", "subnotes": [{"content": "Restricted until Jan 1, 2016"}], "jsonmodel_type": "note_text", "publish": true, "subnote_guid": "74b23209436af6b32b758c4d4c3398b"}, {"type": "accessrestrict", "persistent_id": "c89f410181a319b433a110b944746bcf"} }	Restricted until Jan 1, 2016
{ "jsonmodel_type": "note_multipart", "label": "Conditions Governing Access note", "subnotes": [{"content": "Restricted until Jan 1, 2016"}], "jsonmodel_type": "note_text", "publish": true, "subnote_guid": "24d9cc332d6a28b289dda210edcb8ee6"}, {"type": "accessrestrict", "persistent_id": "a97ab3443541361f6ac13140d61000097"} }	Restricted until Jan 1, 2016
{ "jsonmodel_type": "note_multipart", "label": "Conditions Governing Access note", "subnotes": [{"content": "Restricted until Jan 1, 2016"}], "jsonmodel_type": "note_text", "publish": true, "subnote_guid": "02485ded634ee0f91a153e7421ab156"}, {"type": "accessrestrict", "persistent_id": "e27209987dcefc0069b9a74e961ae1d87"} }	Restricted until Jan 1, 2016
{ "jsonmodel_type": "note_multipart", "label": "Conditions Governing Access note", "subnotes": [{"content": "Restricted until Jan 1, 2016"}], "jsonmodel_type": "note_text", "publish": true, "subnote_guid": "c4d53b77c2673d1371282ccc5017ef9"}, {"type": "accessrestrict", "persistent_id": "ac3498c509272bfc5e2ae51ab5891167"} }	Restricted until Jan 1, 2016
{ "jsonmodel_type": "note_multipart", "label": "Conditions Governing Access note", "subnotes": [{"content": "Restricted until Jan 1, 2016"}], "jsonmodel_type": "note_text", "publish": true, "subnote_guid": "02485ded634ee0f91a153e7421ab156"}, {"type": "accessrestrict", "persistent_id": "8626132ecc82cdec0d49666607e6a047"} }	Restricted until Jan 1, 2016
{ "jsonmodel_type": "note_multipart", "label": "Conditions Governing Access note", "subnotes": [{"content": "Restricted until Jan 1, 2016"}], "jsonmodel_type": "note_text", "publish": true, "subnote_guid": "1497623eaa2336831ab72e4b41299e07"}, {"type": "accessrestrict", "persistent_id": "103a6a5647164b13463a1b0332ac588c7"} }	Restricted until Jan 1, 2016
{ "jsonmodel_type": "note_multipart", "label": "Conditions Governing Access note", "subnotes": [{"content": "Restricted until Jan 1, 2016"}], "jsonmodel_type": "note_text", "publish": true, "subnote_guid": "c7caaa79b634740316160e0d6b13fa1"}, {"type": "accessrestrict", "persistent_id": "fb2aad46b69a9b456fbfd46afaa149a37"} }	Restricted until Jan 1, 2016
{ "jsonmodel_type": "note_multipart", "label": "Conditions Governing Access note", "subnotes": [{"content": "Restricted until Jan 1, 2016"}], "jsonmodel_type": "note_text", "publish": true, "subnote_guid": "04bed94479cc4f18728680146fb2f64"}, {"type": "accessrestrict", "persistent_id": "d61e85392ecad1e01240988c3c5f3797"} }	Restricted until Jan 1, 2016
{ "jsonmodel_type": "note_multipart", "label": "Conditions Governing Access note", "subnotes": [{"content": "Restricted until Jan 1, 2016"}], "jsonmodel_type": "note_text", "publish": true, "subnote_guid": "7a1387aab311e4112ac09e2eactc67b"}, {"type": "accessrestrict", "persistent_id": "b43ee3cf688a08f31f9aaaa41e02d6267"} }	Restricted until Jan 1, 2016

Location Management



“I’m crunched for space and anticipating
bringing in three big collections in the next
month; do I have enough stack space and where
am I going to put them?”

“I just processed a 50 linear foot collection, some of which will go offsite and the remainder will stay onsite. How can I figure out where to shelve it without turning all of the compact shelving aisles, and how do I make sure I know where everything is when it needs to be recalled?”

“I’m writing a disaster plan and want to identify specific items that are especially valuable to my institution so that I can move them to a safer and easier to reach area in the event of an emergency.”

Combinations

“I’m being asked to move - along with my collections! - in four months! How do I determine how much stuff I have and how much space there is in the new facility I’m moving to?”

“As a reference archivist, I want researchers to be able to request collection materials at the box or folder level without having to call or email me directly. I also want to retrieve these materials without having to organize a search party.”

“As a manager, I want to track how a collection moves from the processing area to storage to the reading room and back to storage again.”

“I want to reformat our fragile materials that
are too damaged or unstable for patrons to use.
How much do we have, where is it, and what
already has a surrogate?”

“My institution’s ILS uses specific codes as part of the offsite workflow; is there an alternative to me hand-coding the 863 and 949?”

https://github.com/NYULibraries/nyu_marxml_export_plugin

=541 1\$aDonated by Felice Picano in October of 2015; the accession number associated with this gift is 2015.444.

=546 1\$aMaterials are in English.

=555 1\$aFinding aid online:\$uhttp://dlib.nyu.edu/findingaids/html/fales/mss_444/

=610 24\$aSea Horse Press.

=610 27\$aGay Presses of New York.

=650 10\$aGays in popular culture.

=650 10\$aGay men in literature.

=650 10\$aHomosexuality in literature.

=650 10\$aLiterature publishing\$zUnited States\$xHistory\$y20th century.

=650 10\$aPublishers and publishing.

=650 10\$aAuthors, American\$y20th century.

=650 10\$aGays' writings, American.

=650 10\$aHomosexuality and literature\$zUnited States.

=853 00\$81\$aBox

=856 42\$yFinding aid online\$uhttp://dlib.nyu.edu/findingaids/html/fales/mss_444/

=863 11\$81.1\$a1\$p31142063292133

=949 01\$aNNU\$bBFALE\$cFALES\$4\$jMSS.444\$mMIXED\$i04\$sVH\$p31142063292133\$wBox 1\$e1

=863 11\$81.2\$a2\$p31142063292141

=949 01\$aNNU\$bBFALE\$cFALES\$4\$jMSS.444\$mMIXED\$i04\$sVH\$p31142063292141\$wBox 2\$e2

=863 11\$81.3\$a3\$p31142063292158

=949 01\$aNNU\$bBFALE\$cFALES\$4\$jMSS.444\$mMIXED\$i04\$sVH\$p31142063292158\$wBox 3\$e3

=863 11\$81.6\$a6\$p31142063292166

=949 01\$aNNU\$bBFALE\$cFALES\$4\$jMSS.444\$mMIXED\$i04\$sVH\$p31142063292166\$wBox 6\$e6

=863 11\$81.4\$a4\$p31142063292174

=949 01\$aNNU\$bBFALE\$cFALES\$4\$jMSS.444\$mMIXED\$i04\$sVH\$p31142063292174\$wBox 4\$e4

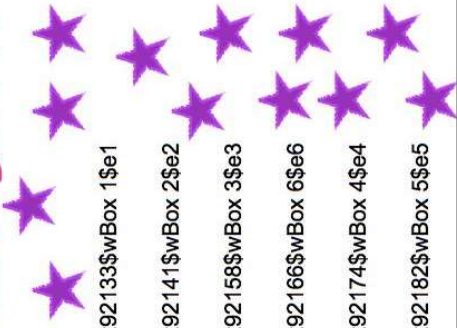
=863 11\$81.5\$a5\$p31142063292182

=949 01\$aNNU\$bBFALE\$cFALES\$4\$jMSS.444\$mMIXED\$i04\$sVH\$p31142063292182\$wBox 5\$e5

MARC Export - Changes to ArchivesSpace MARCXML

Object	Property	Constant or Variable	Process
Update existing fields LDR - add "a" in position 8	n/a	constant	position 8
008 - code for single collection-level dates	n/a	variable	if date[0].c
040 - add \$b	n/a	constant	
repository	n/a	variable	
repository	n/a	constant	
resource	finding_aid_description_	variable	
n/a	n/a	constant	
245 - formatting in and between fields	n/a	constant	insert com
resource	title	constant	remove spaces around dash, add period at end of \$f if no \$g present.
date	begin, end	variable	add "(bulk)" to text string, remove spaces around dash if two years are present, remove 2nd date if 1st and 2nd date are same, add period at end
date	begin, end	variable	
n/a	n/a	constant	
544 - change indicators and subfield type	n/a	constant	ind1="1" rather than "
n/a	n/a	variable	export as subfield n rather than a
note	type-relatedmaterial	constant	
n/a	n/a	constant	
544 - change export field of separatedmaterial	n/a	constant	should export as 544 ind1="0" ind2=" " rather than 500 ind1=" " ind2=" "
n/a	n/a	constant	remove "Materials Separated from the Resource: " at beginning of text string; export as subfield n rather than a
note	type-separatedmaterial	constant	
n/a	n/a	constant	

Holdings!!!



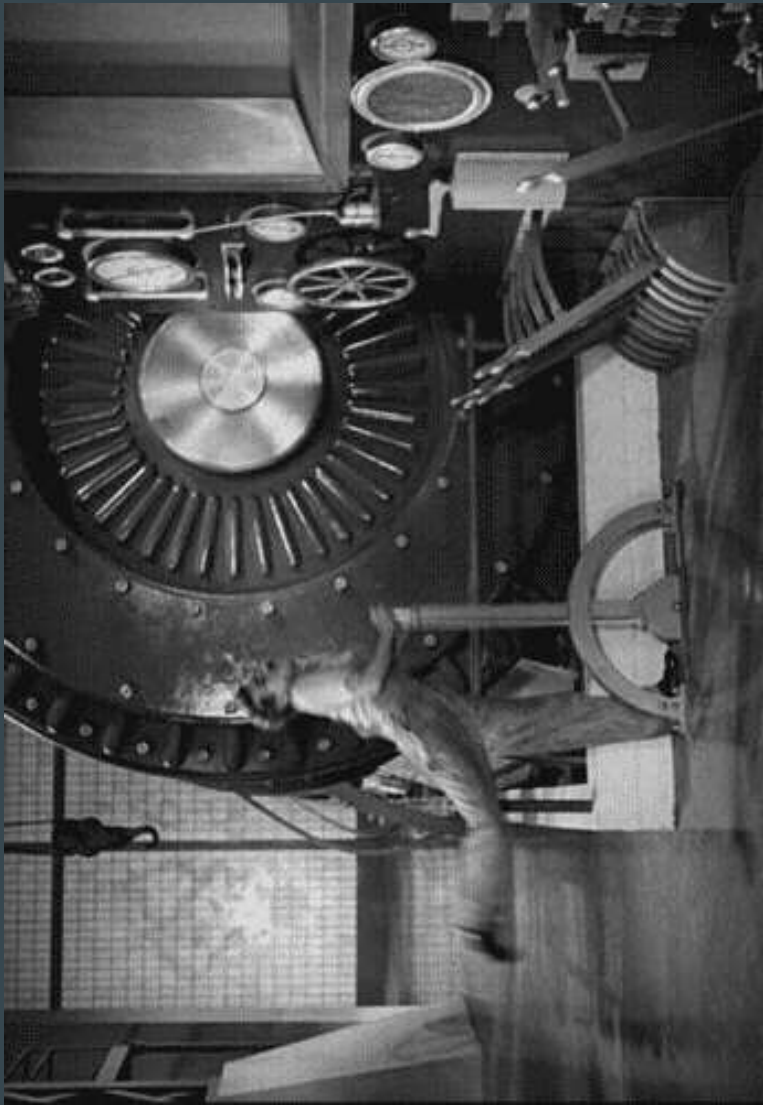
<subfield code="f">1909-2008</subfield>
 <subfield code="g">[bulk 1950].</subfield>
 </datafield>
 <datafield ind1="1" ind2=" " tag="544">
 <subfield code="n">Peter Coffin artwork on Moby-Dick, MSS 1851.</subfield>
 </datafield>
 <datafield ind1="0" ind2=" " tag="544">
 <subfield code="n">Books and newspapers were separated to the circulating collection.</subfield>
 </datafield>



And so many more use cases!

What are yours?

A Note on Using Power Tools



Data Remediation: Tools and Lessons Learned



Tools

<https://github.com/ucanacallmealicia/archivesspace-collection-control-toolbox>

