**Subjects**

**Functional overview**

Subjectrecords contain information about terms describing the principal themes, topical contents, and format characteristics of materials described in ArchivesSpace. Subject records are established and maintained separately in ArchivesSpace and are associated with accession, resource, resource component, digital object, and digital object component records by linking.

Subject terms function most effectively in ArchivesSpace when derived from broadly shared standard thesauri or controlled vocabularies such as the *Library of Congress Subject Headings* (LCSH) or the Art and Architecture Thesaurus (AAT). When creating subject records, ArchivesSpace users should adhere to the rules and standards associated with the specific controlled vocabulary, thesaurus, or authority file from which subject terms have been derived.

Subject records are not used to record information about the proper names of persons, corporate entities, or families functioning as subjects of materials described in ArchivesSpace. Information for these entities, and for software, is recorded and managed in **Agent** records.

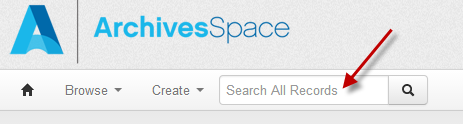
Subject records support simple or compound hierarchical subjects (e.g., a topical heading subdivided by geographical and chronological subheadings). A subject record can be applied at any level of description for accessions, resources, and digital objects.

Note: Subject records linked to Accession records, Resource component records, and Digital Object component records will not be exported to MARCXML records. They will export for EAD files. The same is true for **Agent** records.

**Search for a Subject Record**

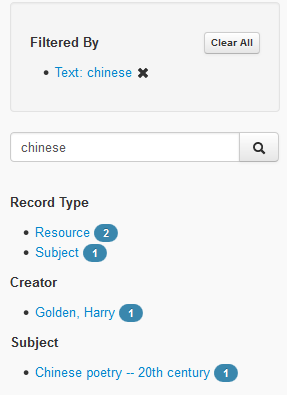
The search box on the main toolbar performs a keyword search across all fields and record types, i.e. Agents, Accessions, Resources, Subjects, etc.

1. On the main toolbar, type your search query into the **Search** box. ArchivesSpace will display all the results for your search.



1. You can perform the following operations to select a particular record from the list of search results.
2. Narrow the list of retrieved records: Click on the available filters on the left side of the records list. Examples: Record Type, Creator, or Subject.

Example:



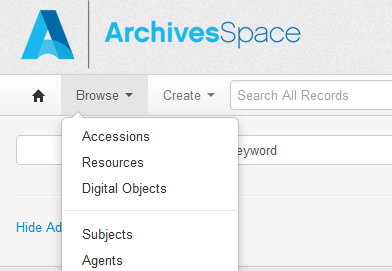
1. Sort the list of retrieved records: Click on the desired sort order in the **Sort by** dropdown menu in the top right corner of the records list display. Subject records may be sorted by Relevance, Title, Date Created, Date Modified, and Record Type.



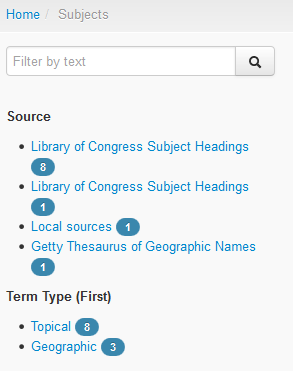
**Browse for an Subject Record**

The browse search on the main toolbar performs a search by record type and displays the results in the order selected in the **Sort by** box in the top right corner of the result display.

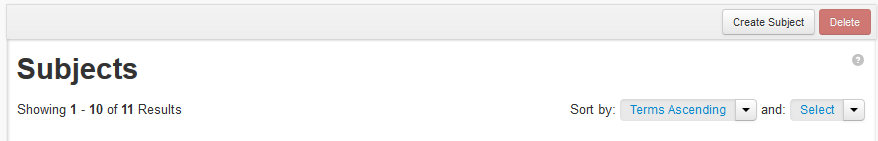
1. On the main toolbar, click **Browse** and select **Subjects**. A listing of all the subject records in the repository will display.



1. You can perform the following operations to select a particular record from the list of subject records.
   1. Narrow the list of retrieved records: Click on the available filters on the left side of the records list. Examples: Library of Congress Subject Headings, Local Sources, Topical, Geographic.

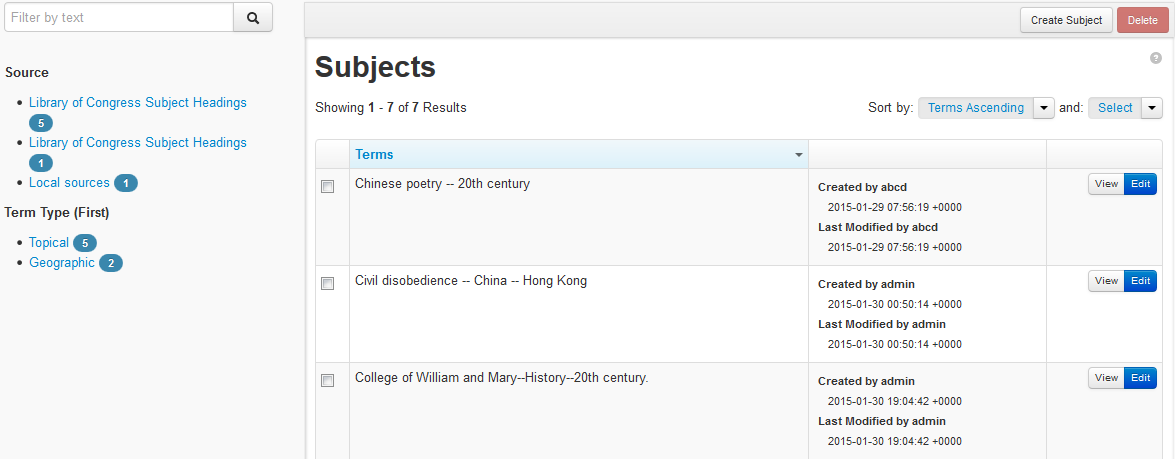


* 1. Sort the list of retrieved records: Click on the desired sort order in the **Sort by** and **Select** dropdown menus box in the top right corner of the records list display. Subject records may be sorted using the two dropdown menus by Terms Ascending, Terms Descending, Created Ascending, Created Descending, Modified Ascending, and Modified Descending.



**View a Subject Record**

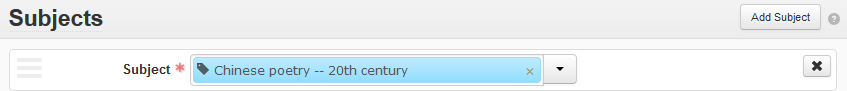
Use **Search** or **Browse** to find the subject record you want to view. Click the **View** button on the right to see the record.



**View a Subject Record in a New Window from Within an Accession, Resource, or Digital Object Record**

This function enables a subject record to be opened in a new window from within an accession, resource, or digital object record and edited simultaneously.

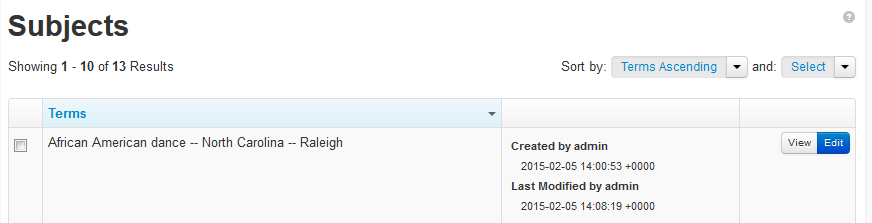
1. Navigate to the subjects sub-record of an accession, resource, or digital object record. Place your cursor over the subject highlighted in blue and click on it. A small **View** button will appear.



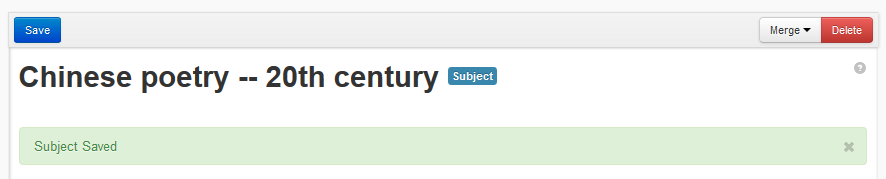
1. Click the **View** button. The subject record will open in a new window.

**Edit a Subject Record**

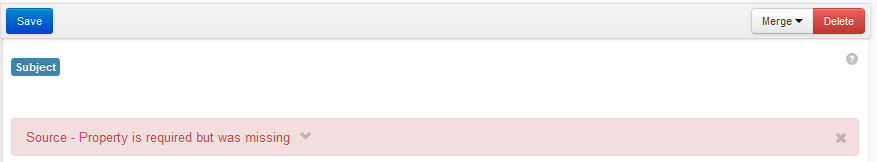
1. On the main toolbar, click **Browse** and select **Subject**. Search and filter to find and select the subject you wish to edit. Click the **Edit** button.



1. Make any desired changes to the subject record, and then click **Save**. The green bar on the screen will indicate that the record has been saved.



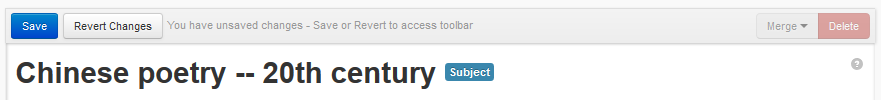
If the subject is missing any required fields, you will be prompted to complete the field(s) before saving the record.



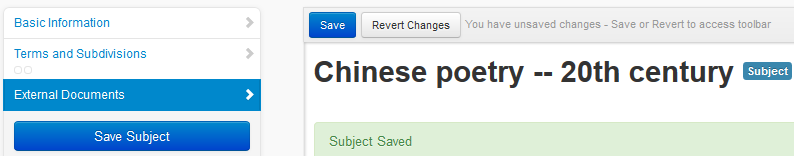
**Save a Subject Record**

There are three ways to save a subject record when you are in the edit view.

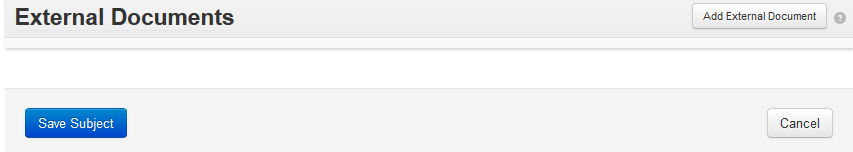
1. The **Save** button located at the top of the subject record under the main tool bar.



1. The **Save Subject** button located at the bottom of the left navigation window.



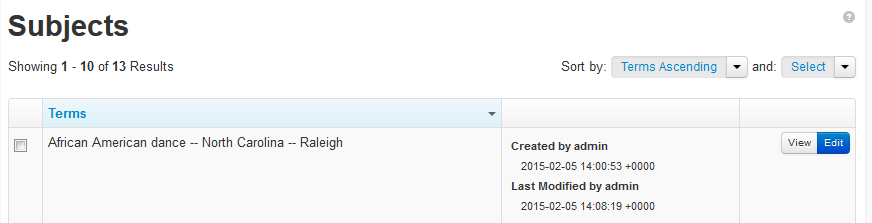
1. The **Save Subject** button located at the bottom of the subject record.



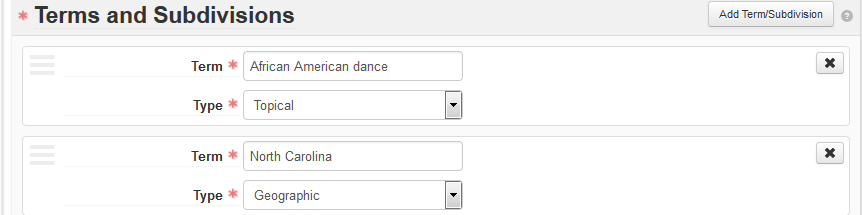
In this document, the term “Save” will be used to mean any of these three methods of saving a record.

**Delete Part of a Subject Record**

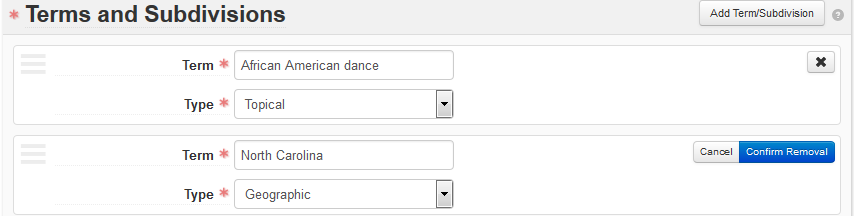
1. Use **Search** or **Browse** to find the subject record you want to edit.
2. Click the **Edit** button at the right side of the appropriate record in the results list.



1. When the record opens, click the sub-record of the record you wish to delete on the left navigation bar.
2. At the top of the subjects sub-record form, click on the **X** in the upper right corner.



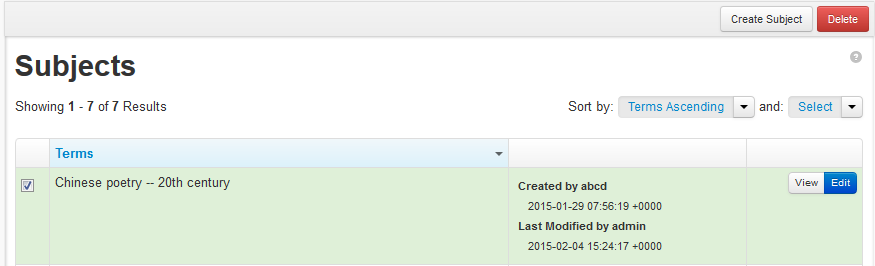
1. Click the blue **Confirm Removal** button that will appear in the upper right corner of the section to delete the subject sub-record, or click **Cancel** to retain it.



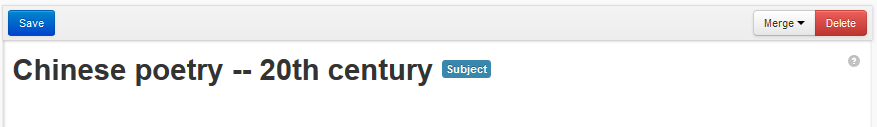
**Delete an Entire Subject Record**

Use **Search** or **Browse** to find the subject record you want to delete. If you use a browse search, you have two options for deleting a subject. If you use a keyword search (i.e., the search box), you will only be able to use option 2 (below) to delete a subject record.

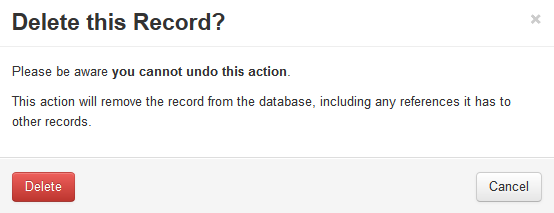
1. On the browse results screen, click the checkbox at the left of the record you wish to delete. Then click the red **Delete** button in the upper right corner.



1. On the results screen, click the **Edit** button to open the subject record in edit mode. Then click the red **Delete** button in the upper right-hand corner of the resource record.



In each case, the system will warn you that you are permanently deleting the record. Click **Delete** again to continue, or click **Cancel** or **X** to exit the screen without deleting the record.



**Subject Record Toolbar Functions**

A subject record has a unique toolbar with several features that will display depending on your login permissions and installation setup. The features you may see include: **Save**, **Merge**, And **Delete**.



**Save**: The blue save button at the left of the bar is one of three ways to save a record. The others are the **Save Subject** button in the navigation bar on the left and the **Save Subject** button at the very bottom of the subject record.

**Merge**: The **Merge** feature collapses two or more separate subject records into one record. See **Merge Subject Records** for more information about this feature.

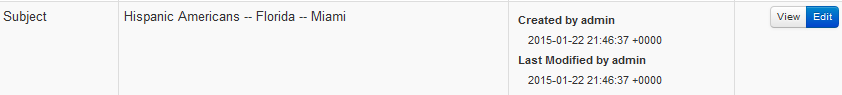
**Delete**: The **Delete** button deletes the entire subject record from the database.

**Merge Subject Records**

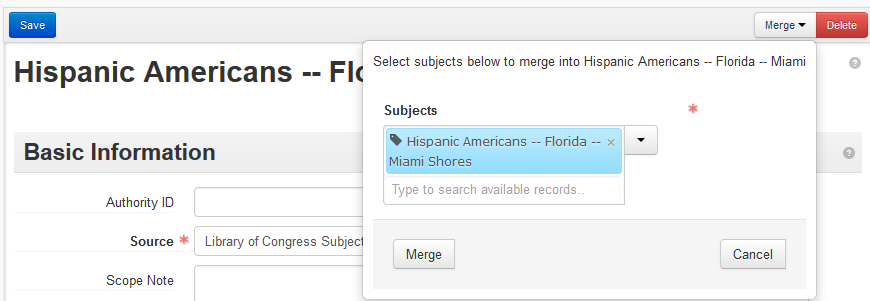
Merging subject records may be appropriate when a repository has been using two or more subject terms with only slight differences for the same topic and wishes to simplify usage by consolidating the terms into a single preferred term. Note that merging subject records involves the permanent deletion of the subject record that is merged into another record. . Any records that had been linked to the deleted subject record will now be linked to the merged subject record. This action cannot be reversed.

1. Browse or search for the record for the subject you would like to merge with other subject records. Click **Edit** at the far right of the subject record in the results list.

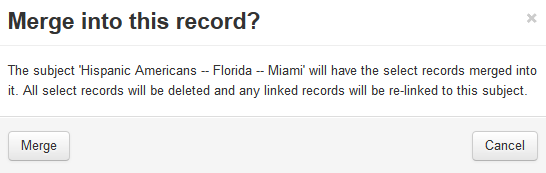
**Caution**: The record you are searching for in this step is the record you would like to preserve in the database. The record(s) you would like to merge with this record and then delete is searched for in step 2 below.



1. Click the **Merge** dropdown menu at the upper right corner of the subject record and type the first few letters of the subject you would like to merge with the subject represented by the current record. Matches will appear in pale blue. Click the term you wish to merge and then click **Merge**.

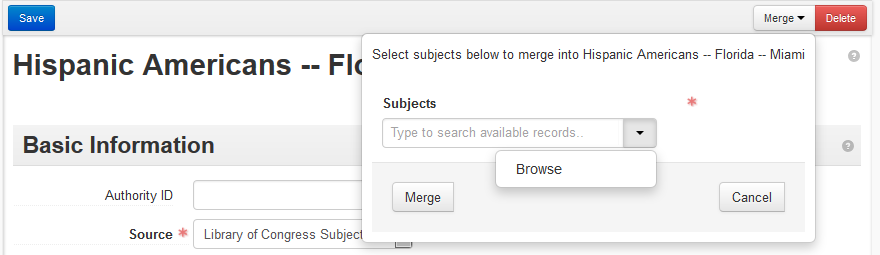


1. A pop-up box will appear asking you to confirm your choice to merge the two records. Click **Merge**.

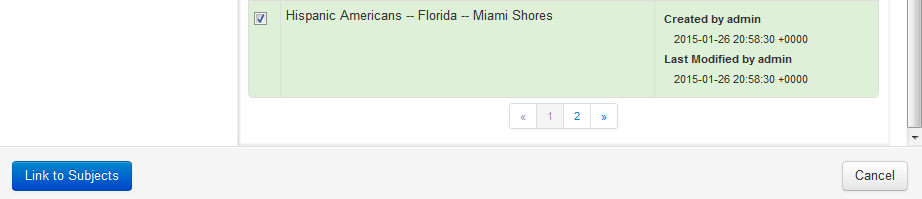


An alternative method of merging subject records involves using a browse search to find the subject record that will be merged.

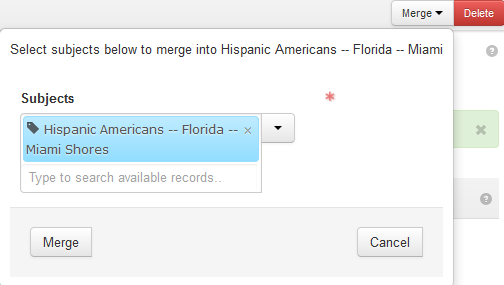
1. While inside the subject record with which you would like to merge other subject records, click the dropdown menu arrow next to the **Subject** and choose **Browse**.



1. In the pop-up box that will appear, browse for the subject that you wish to merge with the subject represented by the current record. Check the radio button to the left of the record in the results list. Then click **Link to Subjects**.



1. When the correct subject record has been selected, click **Merge.**

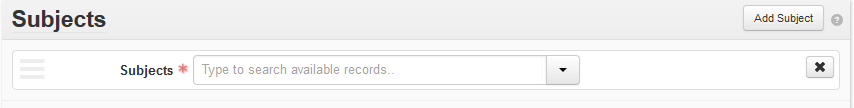


1. A pop-up box will ask you to confirm whether you wish to merge the records. Click **Merge**, or click **Cancel** if you wish to abort the merge.

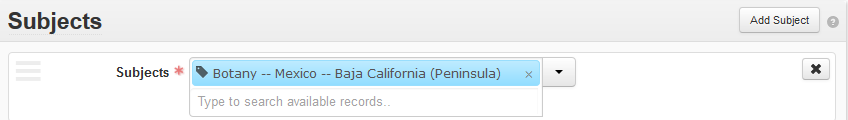


**Link an Accession, Resource, or Digital Object Record to a Subject**

1. On the left navigation bar of the Accession, Resource, or Digital Object record, click **Subjects**. Then click **Add Subject** on the right-hand side of the Subjects sub-record.

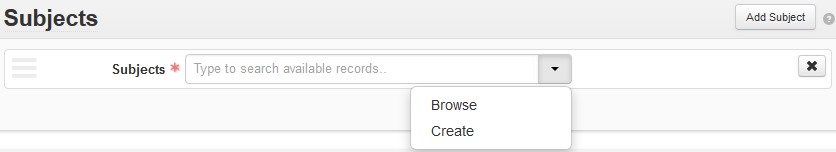


1. Locate subject records by typing the first few letters of the subject term you are seeking directly into the empty subjects field. Click on the appropriate subject term from the pale blue list of subject matches that will appear. The subject term you select from the list will be inserted in the field. **Save** the record.



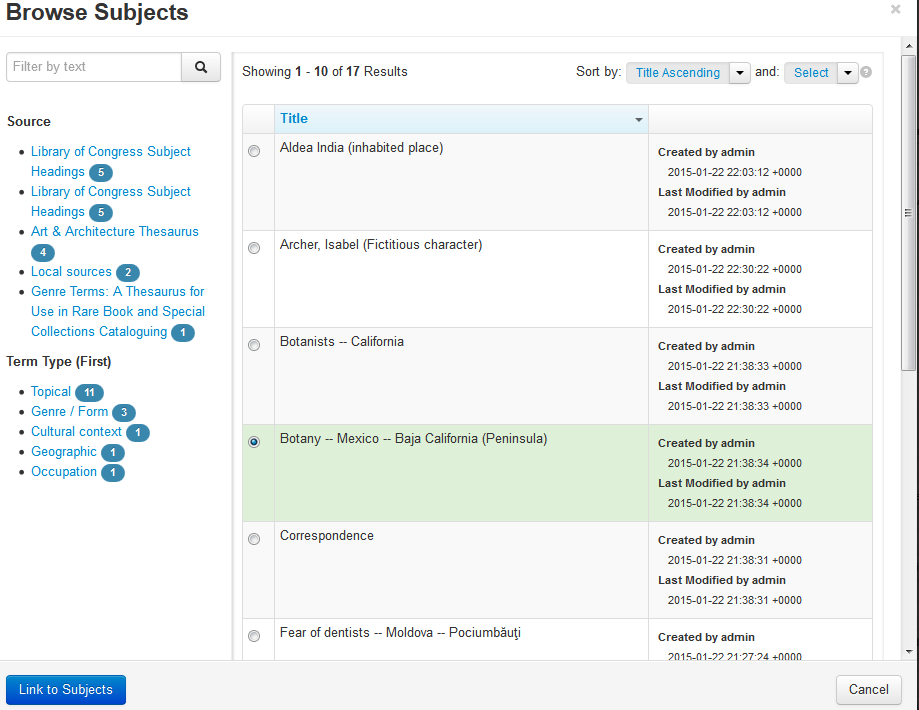
Alternative methods of linking to subject records involve browsing the database for records or creating a new subject record if the desired record does not yet exist in the database.

1. Click on the dropdown menu arrow beside the **Subjects** field and choose **Browse** or **Create**.



The **Browse** command will cause a pop-up box to appear with a list of all the subject records available in your ArchivesSpace instance.

1. To select a subject to link to the accession, resource, or digital object record, click on the radio button to the left of the subject record in the list. Then click **Link to Subjects** at the bottom of the pop-up box.

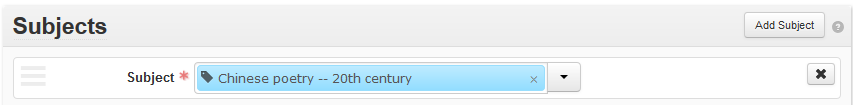


1. When you have linked the desired subject term, **Save** the record.
2. Choose **Create** from the subjects dropdown menu if no subject record is available for the subject you wish to link. Follow the instructions in **Create a New Subject** above.

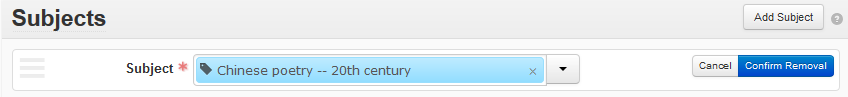
**Remove a Subject Link from an Accession, Resource, or Digital Object Record**

Use **Search** or **Browse** to find the accession, resource, or digital object that contains the subject link you wish to delete.

1. Click the **Edit** button at the right-hand side of the desired record in the results list.
2. When the record opens, click **Subjects** on the navigation bar at the left of the screen to navigate to the subject sub-record(s)..
3. Click on the **X** in the right corner of the subject link you wish to delete.



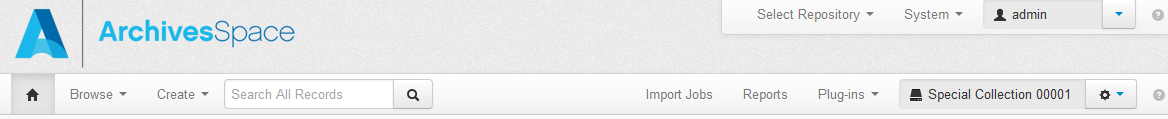
1. Click the blue **Confirm Removal** button that will appear in the upper right corner of the section to delete it, or **Cancel** to retain it.



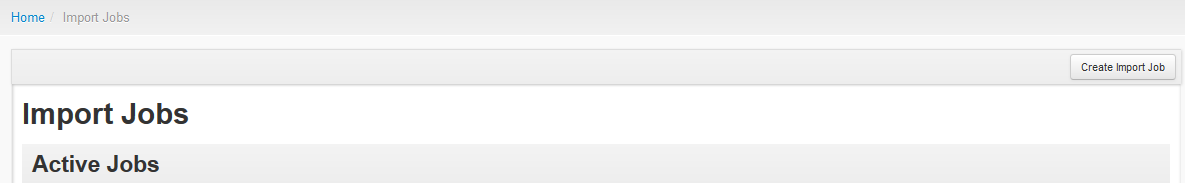
**Import Subject Records in a MARCXML File**

Subject records from an external source (e.g., the OCLC Connexion authorities file) may be imported into ArchivesSpace in a MARCXML file.

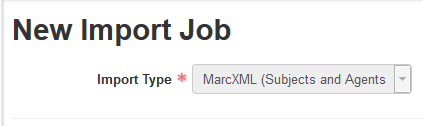
1. Save the MARCXML file you have created from an external source to your desktop.
2. On the ArchivesSpace homepage, click **Import Jobs**.



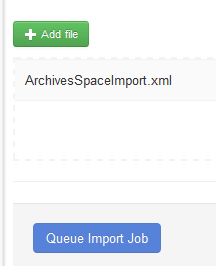
1. Click the **Create Import Job** at the top right of the Import Jobs page.



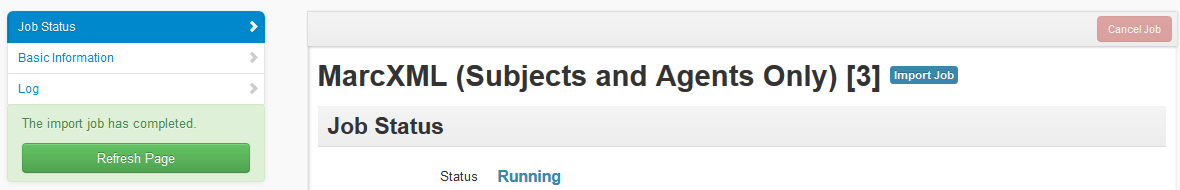
1. Click the arrow at the right of the **Import Type** dropdown list and choose **MARCXML (Subjects and Agents Only)**. Then click **Add File**.



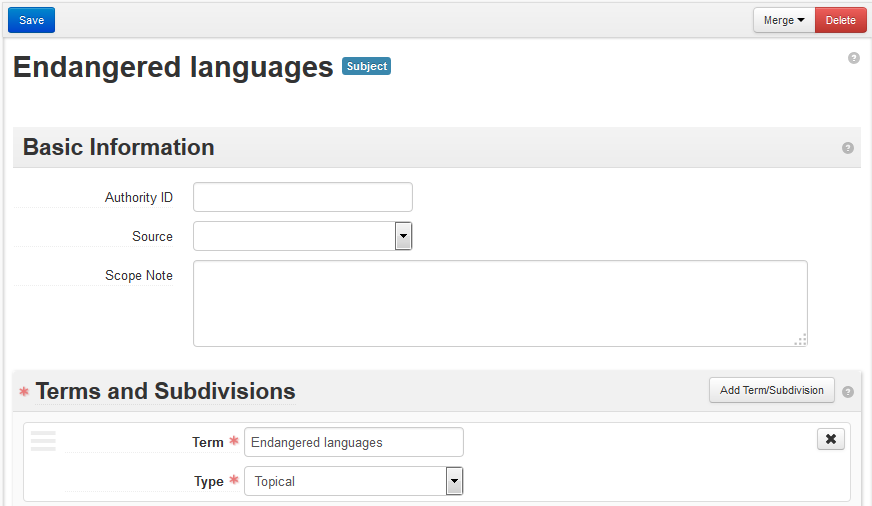
1. Open the MARCXML file to be imported on your desktop. The name of the file will appear beneath the green **Add File** button in ArchivesSpace. Click the blue Queue Import Job button below the name of the file to be imported.



1. ArchivesSpace will import the file, creating a log of import actions. When the file has been imported, a message indicating that the import job has completed will appear at the left of the screen.



1. MARCXML records imported from other sources are often minimal, meaning that they will include only the required fields. Such records can be enhanced with additional information after import if desired.



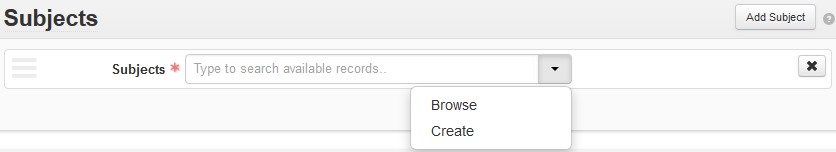
Imported subject record from OCLC authorities file lacks Authority ID, Source field information.

**Create a New Subject Record**

Subject records may be created from within an accession, resource record, or digital object record, or from the ArchivesSpace home page.

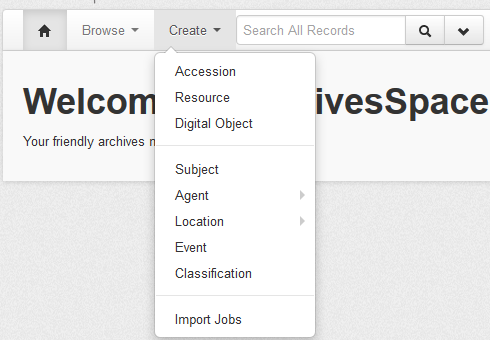
If you are already working in an accession, resource record, or digital object record:

* On the left navigation bar, click **Subjects**. The record to the right will scroll down to the **Subjects** section. Click **Add Subject** on the right-hand side of the Subjects bar. Then click the dropdown list button and select **Create**.



If you are starting from ArchivesSpace home:

* On the main toolbar, click **Create** and select **Subject** from the dropdown menu.



**Subject Record Fields**

Each subject record contains three sub-records: **Basic Information, Terms and Subdivisions,** and **External Documents**. The **Basic Information** and **Terms and Subdivisions** sub-records contain required fields that must be supplied in order for you to add the subject record to the database. These fields are indicated with red asterisks. The **External Documents** sub-recordis not required in order to add a new subject record. However, if you choose to add this sub-record, you must supply the asterisked fields **Title** and **Location**.

A minimal subject record may be created by filling in only the required fields. The minimal record can be enhanced later with additional fields.

**Required Elements**: **Source** (Basic Information Sub-Record), **Term** and **Type** (Terms and Subdivisions Sub-Record)

**Basic Information Sub-Record**

The **Basic Information** sub-record contains information about the source and identifiers of controlled vocabulary terms recorded in subject records.

**Fields**:

1. **Authority ID** (open text field): The unique identifier for the record within the source from which the term was acquired (e.g., an LCSH number, the ID number of a Getty Thesaurus of Geographic Names record, etc.). The identifier may be represented as a URI.
2. **Source** (dropdown list): The controlled vocabulary or thesaurus from which an established term is derived. Source values assigned in this field are used as filters in the left-hand navigation pane in keyword and browse searches.

There are nine default **Source** values that may be assigned to subjects from the dropdown list:

**Art and Architecture Thesaurus**

**Genre Terms: a Thesaurus for Use in Rare Book and Special Collections Cataloging**

**Getty Thesaurus of Geographic Names**

**Library of Congress Subject Headings**

**Local Sources**

**Medical Subject Headings**

**Source Not Specified**

**TGM II, Genre and Physical Characteristic Terms**

The option **Local Sources** is available for cases in which the term used has not been derived from one of the thesauri or controlled vocabularies provided in the list and is maintained in a local list of preferred terms.

1. **Scope note** (open text field): A note that explains and clarifies how and in what situations the term should be used and/or distinguishes it from similar terms.

Example:



**Terms and Subdivisions Sub-Record**

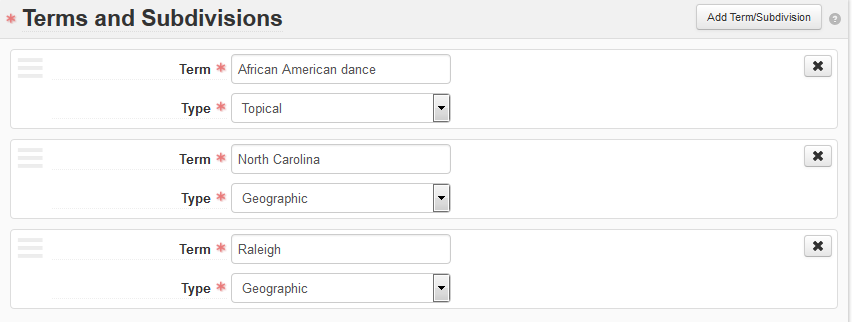
The **Terms and Subdivisions** sub-record is mandatory. Two elements, **Term** and **Type**, must be supplied.

**Fields**:

1. **Term** (open text field): The term for the subject. Each subject record must have at least one term associated with it.

If the term is compound or multipart in nature (e.g., an LCSH term accompanied by geographical, topical, or chronological subheadings), enter the primary term in this field and create additional term and type fields for the subsidiary element(s) of the term by clicking **Add Term/Subdivision** for each subsequent element. This command will cause new **Term** and **Type** fields to appear.

Example: African American dance -- North Carolina -- Raleigh



1. **Type** (dropdown list): Indicates the type or category of the term being recorded. Type terms assigned in this field are used as filters in the left-hand navigation pane in keyword and browse searches for subjects.

There are ten values that can be assigned to subjects in ArchivesSpace from the Type dropdown list.

**Cultural Context**

**Function**

**Genre/Form**

**Geographic**

**Occupation**

**Style/Period**

**Technique**

**Temporal**

**Topical**

**Uniform Title**

Choose a type value from the dropdown list that accurately describes the scope and nature of the term applied and/or the controlled vocabulary from which it is derived.

Examples:

LCSH terms = Topical

LCSH geographical subheadings = Geographic

Basic Genre Terms for Cultural Heritage Materials (BGTCHM) = Genre/Form

**External Documents Sub-Record**

The External Documents sub-record creates links to external documentation that discusses how a particular subject record is to be used.

To add the external documents fields sub-record, click on the **Add External Document** button at the right of the sub-record.



**Fields**:

1. **Title** (open text field): The title of an external document. The document may be of any form or content. Examples: A web accessible file, a network accessible file, a file on the same computer as the application, etc.
2. **Location** (open text field): The location of the file, ideally a resolvable URI. Example: http://www.archivesspace.org/membershipfile:///c:/path/to/the%20file.txt
3. **Publish** (check box): A selected check box indicates that this External Document should be published to the public interface. Since subjects do not yet have page-level views in the public interface, however, any external documents attached to a subject will only be visible in the staff interface.

**Agent Records**

**Functional overview**

**Agent records** identify persons, families, corporate entities, or software that have a specified relationship to archival materials or to an event. Agent records are also used to manage relationships among names. They are established and maintained separately in ArchivesSpace and may be associated with accession, resource, resource component, digital object, and digital object component records by linking.

There are four types of agent records in ArchivesSpace:

1. **Person**
2. **Family**
3. **Corporate entity**
4. **Software**

Each agent record type must be linked to materials descriptions as a **creator**, **source**, or **subject**.

1. **Creator** designates the primary responsibility for the material being described. Creator can encompass, at various levels in a multilevel description, the person, family, or corporate entity responsible for the archival provenance of the material being described, or for the intellectual content of the same material.
2. **Source** designates the immediate source of acquisition of the materials being described.
3. **Subject** designates that the materials being described are topically about the named person, family, or corporate entity.the topic or theme of the materials being described.

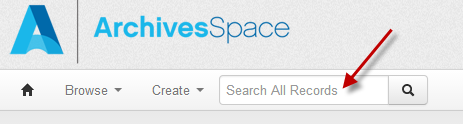
Agent records in ArchivesSpace are designed to conform with the *International Council on Archives’ International Standard Archival Authority Record for Corporate Bodies, Persons, and Families*, 2nd edition (ISAAR(CPF)). They are also designed to support output in the Encoded Archival Context--Corporate Bodies, Persons, and Families (EAC-CPF) data structure and interchange standard. If an authority record cannot be located and copied from an authorities database, agent records also accommodate the creation of names according to data content rules established in standards such as *Resource Description and Access* (RDA) and DACS. ArchivesSpace users are encouraged to use the DACS rules for forming names when creating Agent records in ArchivesSpace.

Note: Agent records linked to Accession records, Resource component records, and Digital Object component records will not be exported to MARCXML records. They will export for EAD files.The same is true for **Subject** records.

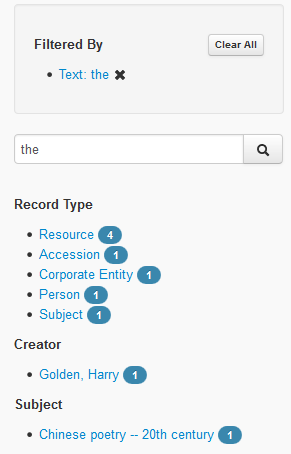
**Search for an Agent Record**

The **Search** box on the main toolbar performs a keyword search across all fields and record types, i.e. Agents, Accessions, Resources, etc.

1. On the main toolbar, type your search query into the search box. ArchivesSpace will display all the results for your search.



1. You can perform the following operations to select a particular agent record from a set of search results.
2. Narrow the list of retrieved records: Click on the available filters on the left side of the records list. Examples: Record Type, Creator.



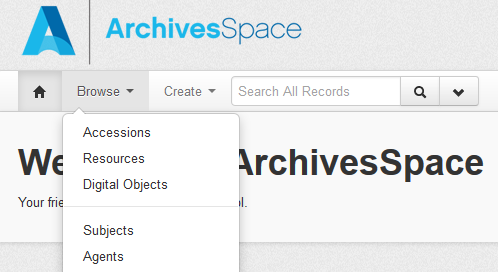
1. Sort the list of retrieved records: Click on the desired sort order in the **Sort by** dropdown menu in the top right corner of the records list display. Agent records may be sorted by Relevance, Title, Date Created, Date Modified, and Record Type.



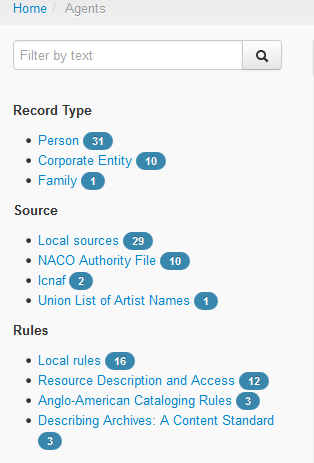
**Browse for an Agent Record**

The **Browse** search on the main toolbar performs a search by record type and displays the results in the order selected in the **Sort by** box in the top right corner of the result display.

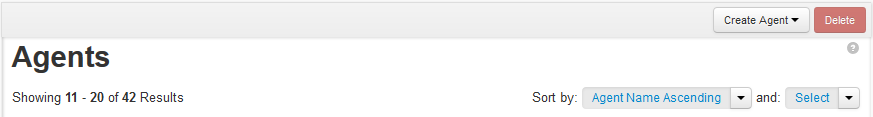
On the main toolbar, click **Browse** and select **Agents**. A list of all the agent records in the repository will display.



1. You can perform the following operations to find a particular agent record:
   1. Narrow the list of retrieved records: Click on the available filters on the left side of the records list. Examples: Record Type, Source, Rules.

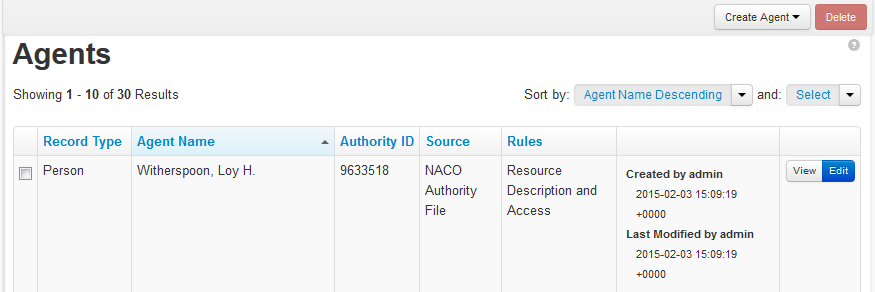


1. Sort the list of retrieved records: Click on the desired sort order in the **Sort by** and **Select** dropdown menus box in the top right corner of the records list display. Agent records may be sorted using the two dropdown menus by Terms Ascending, Terms Descending, Created Ascending, Created Descending, Modified Ascending, and Modified Descending.



**View an Agent Record**

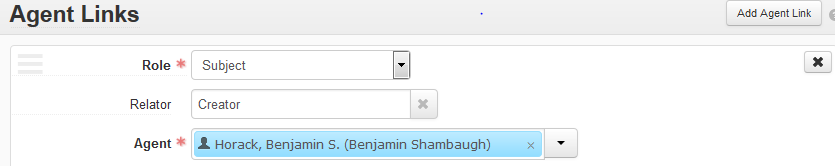
Use **Search** or **Browse** to find the agent record you want to view. Click the **View** button on the right to see the record.



**View an Agent Record in a New Window from inside an Accession, Resource, or Digital Object Record**

This function enables an agent record to be opened in a new window from within an accession, resource, or digital object record and edited simultaneously.

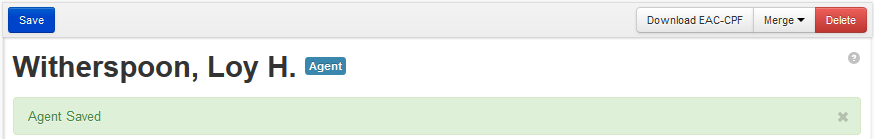
1. Navigate to the **Agent Links** sub-record of an accession, resource, or digital object record. Place your cursor over the agent highlighted in blue and click on it. A small **View** button will appear.



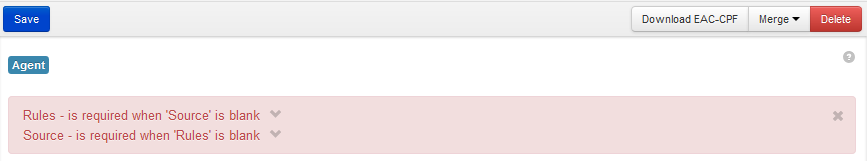
1. Click on the **View** button. The subject record will open in a new window.

**Edit an Agent Record**

1. On the main toolbar, click **Browse** and select **Agent**. Search and filter to find and select the agent you wish to edit.
2. Click the **Edit** button, make the changes you wish, and then **Save** the record. The green bar on the screen will indicate that the record has been saved.



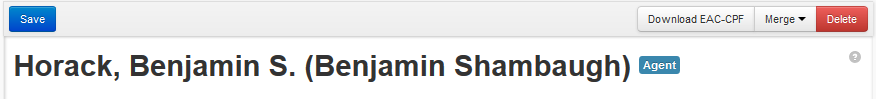
If the subject is missing any required fields, you will be prompted to complete them before saving the record.



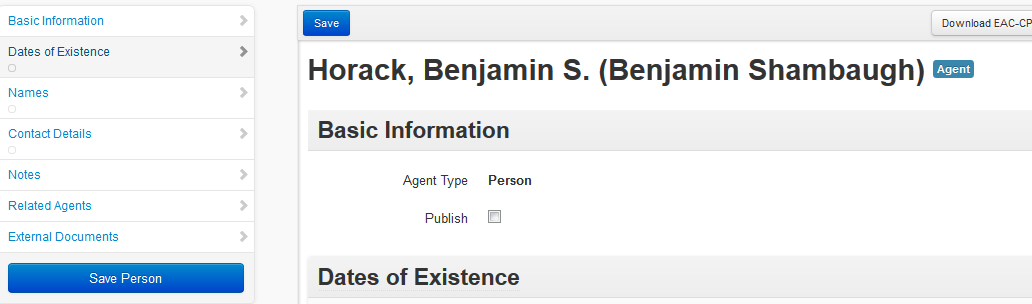
**Save an Agent Record**

There are three ways to save a save an agent record when you are in the edit view.

1. The **Save** button located at the top of the subject record under the main tool bar.



1. The **Save Person (**or **Corporate Entity, Family,** or **Software)** button located at the bottom of the left navigation window.

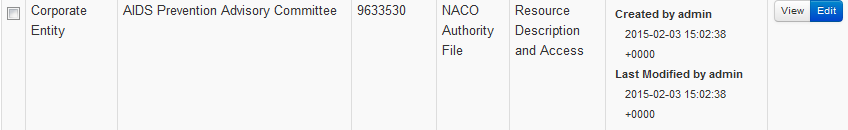


1. The **Save Person** (or **Corporate Entity**, **Family**, or **Software**) button located at the bottom of the subject record.



**Delete Part of an Agent Record**

1. Use **Search** or **Browse** to find the agent record you want to edit.
2. Click the **Edit** button at the right side of the appropriate record in the results list.



1. When the record opens, click the sub-record section of the record you wish to delete on the left navigation bar. Then click the **X** in the upper right corner of the sub-record form.

Example:



1. Finally, click the blue **Confirm Removal** button that will appear in the upper right corner of the sub-record to delete it, or **Cancel** to retain it.

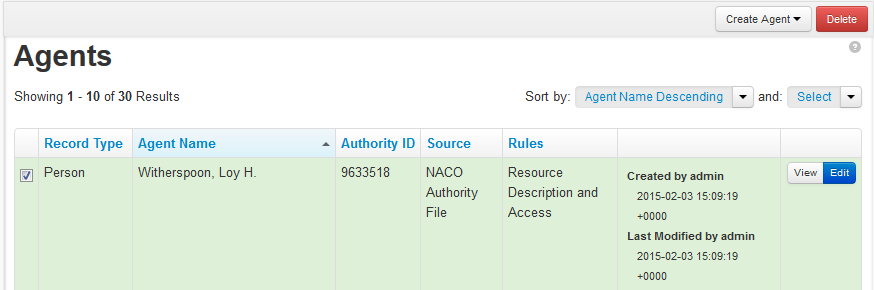
Example:



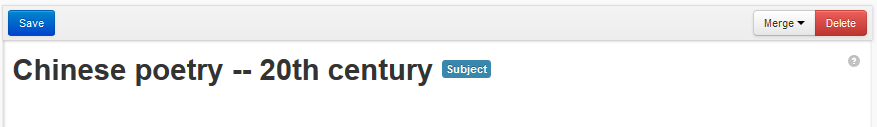
**Delete an Entire Agent Record**

Use **Search** or **Browse** to find the agent record you want to delete. If you use a browse search, you have two options for deleting an agent. If you use a keyword search (i.e., the search box), you will only be able to use option 2 (below) to delete an agent record.

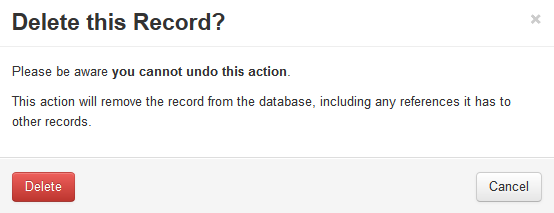
1. 1. On the browse results screen, click the checkbox at the left of the record you wish to delete. Then click the red **Delete** button in the upper right corner.



1. On the results screen, click the **Edit** button to open the agent record in edit mode. Then click the red **Delete** button in the upper right-hand corner of the record.



1. In each case, the system will warn you that you are permanently deleting the record. Click **Delete** again to continue, or click **Cancel** or **X** to exit the screen without deleting the record.



**Agent Record Toolbar Functions**

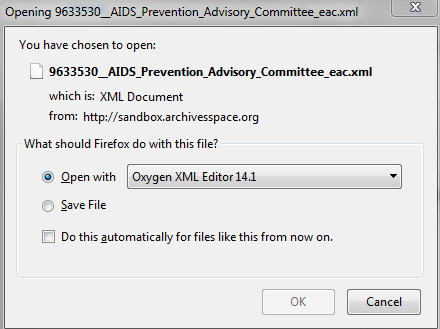
An agent record has a unique toolbar with several features that will display depending on your login permissions and installation setup. The features you may see include: Save, Download EAC-CPF, Merge, and Delete.



**Save**: The **Save** button at the left of the bar is one of three ways to save a record. The others are the **Save Person/CorporateEntity/Family/Software** button in the navigation bar on the left and the **Save Person/CorporateEntity/Family/Software** button at the very bottom of the agent record.

**Download EAC-CPF**: This feature enables the downloading of an EAC-CPF (Encoded Archival Context for Corporate Bodies, Persons, and Families) record that has been automatically generated from the data entered in the agent record. Clicking the **Download EAC-CPF** button will cause a dialog box to appear that can be used to open the file with an XML editor or save it to your local machine.

Example:



**Merge**: The **Merge** feature consolidates two or more separate agent records into one. See the **Merge Agent Records** section for more information on this feature.

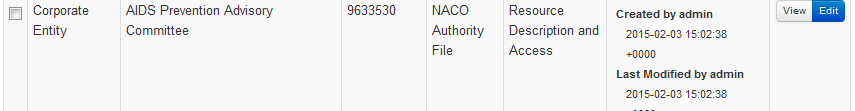
**Delete**: The **Delete** button deletes the entire agent record from the database.

**Merge Agent Records**

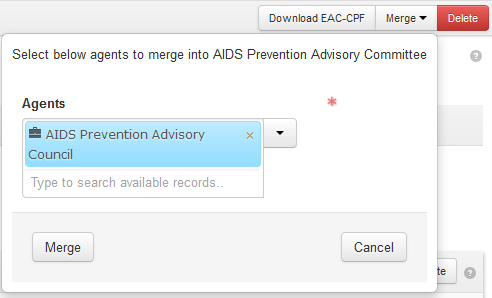
Merging agent records may be appropriate when a repository has been using two different records for the same agent and wishes to simplify usage by consolidating the terms into a single preferred term. Note that merging agents involves the permanent deletion of the agent record that is merged into another record. Any records that had been linked to the deleted agent record will now be linked to the merged agent record. This action cannot be reversed.

1. **Browse** or **Search** for the record for the agent with which you would like to merge other agents. Click **Edit** at the far right of the agent record in the results list.

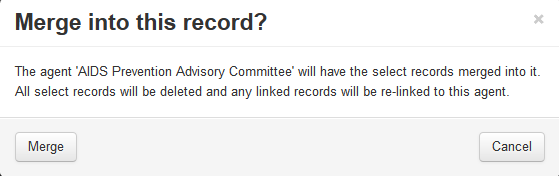
**Caution**: The record you are searching for in this step is the record you would like to preserve in the database. The records you would like to merge with this record and then delete are searched for in step 2, below.



1. Click the **Merge** dropdown menu at the upper right-hand corner of the agent record and type the first few letters of the agent you would like to merge with the agent represented by the current record. Matches will appear in pale blue. Click the term you wish to merge and then click **Merge**.

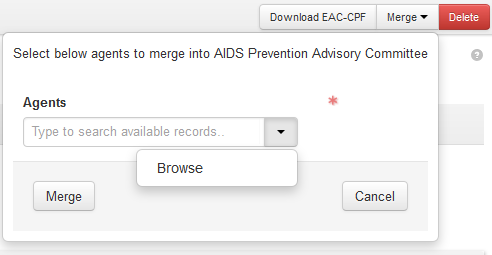


1. A pop-up box will appear asking you to confirm your choice to merge the two records. Click **Merge**, or **Cancel** to abort the merge.

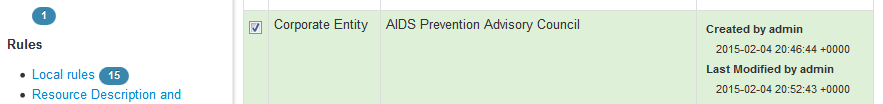


An alternative method involves browsing for the agent record to be merged.

1. Click the dropdown menu arrow next to the **Agents** field and then click **Browse**.

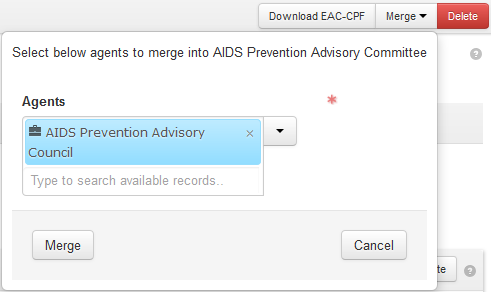


1. In the pop-up box that will appear, browse for the subject that you wish to merge with the subject represented by the current record. Check the radio button to the left of the record in the results list and then **Link to Agents**. Clicking **Link to Agents** will insert the name of the agent in the agents field in the pop-up **Merge** box on the record with which it will be merged.

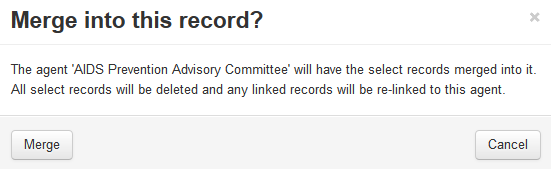




1. When the correct agent record has been selected, click **Merge.**



1. A pop-up box will ask you to confirm whether you wish to merge the records. Click **Merge**, or click **Cancel** if you wish to abort the merge.



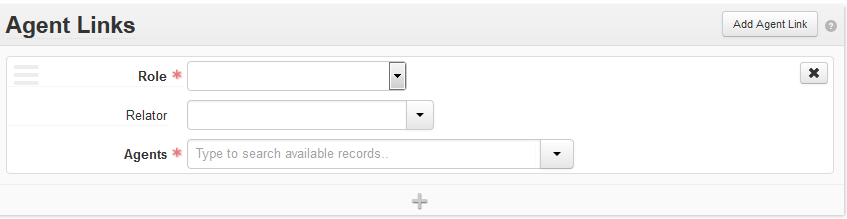
**Link an Agent to an Accession, Resource, or Digital Object Record**

**Required fields**: Role, Agent

1. On the navigation bar to the left of the Accession, Resource, or Digital Object record, click **Agent Links**. Then click **Add Agent** **Link** on the right side of the Agent Links sub-record. This command will open the Agent Links sub-record.

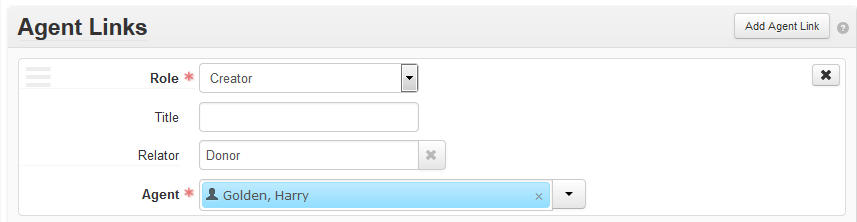


1. In the **Role** dropdown menu, select a value that defines the relationship of the agent to the resource described in the record. Agents may be linked to records as creators, sources, or subjects.



1. You may give the agents who are creators a title in **Title** if you wish (an optional open text field that will appear when **Creator** is selected from the **Role** dropdown list). Title is a descriptive term for the relationship between the record and the agent, not a formal name element from an authority file or controlled vocabulary. Supplying a title for an agent is not an option if the agent is being linked as a source or subject.
2. An optional relator term may be chosen using the dropdown menu to the right of **Relator**. Relator terms specify at a more granular level the agent’s relationship to the accession, resource, or digital object record (e.g., animator, author, dedicatee, donor, owner, etc.).

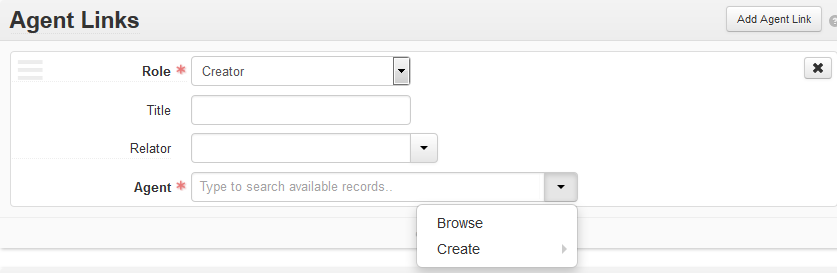
1. In the agent field, type the first few letters of the agent you are seeking and click on the appropriate agent in the pale blue dropdown list that will appear. Remove unwanted terms by clicking on the small **X** at the bottom right-hand corner of the blue box containing the term.



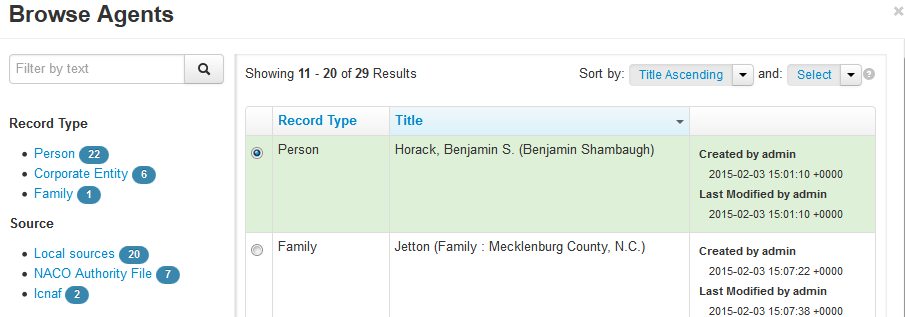
When you have selected the desired agent, **Save** the record.

Alternative methods of linking to agent records involve browsing the database for records or creating a new agent record if the desired record does not yet exist in the database.

1. Click on the dropdown menu arrow beside the **Agents** field and choose **Browse** or **Create**.



1. The **Browse** command will cause a pop-up box to appear with a list of all available agent records. The default order is alphabetical by title, but the **Sort By** and **Select** dropdown menus at the top right-hand corner of the box enable agents to be sorted using two criteria simultaneously—ascending or descending title, ascending or descending creation date, ascending or descending modified date.
2. To link the agent record, , click on the radio button to the left of the agent term name. You can select more than one agent. Then click **Link to Agents** at the bottom of the **Browse Agents** pop-up box.

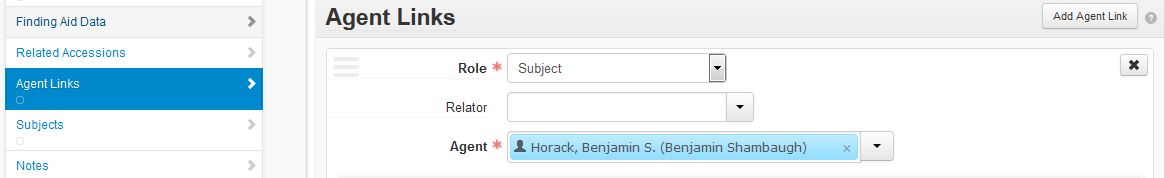




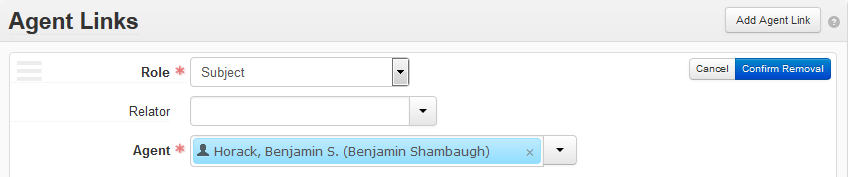
1. Choose **Create** from the dropdown menu if no agent record is available for the agent you wish to link. Follow the instructions in **To Create a New Agent** above.

**Remove an Agent Link from an Accession, Resource, or Digital Object Record**

1. Use **Search** or **Browse** to find the accession, resource, or digital object that contains the agent link you wish to delete.
2. Click the **Edit** button at the right-hand side of the desired record in the results list.
3. When the record opens, click **Agent Links** on the navigation bar to the left of the accession, resource, or digital object record to navigate to the agent linkssub-records.



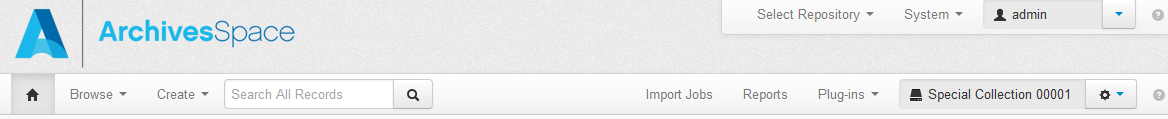
1. Click on the **X** in the right corner of the agent link you wish to delete.
2. Click the **Confirm Removal** button that will appear in the upper right corner of the section to delete the link, or **Cancel** to retain it.



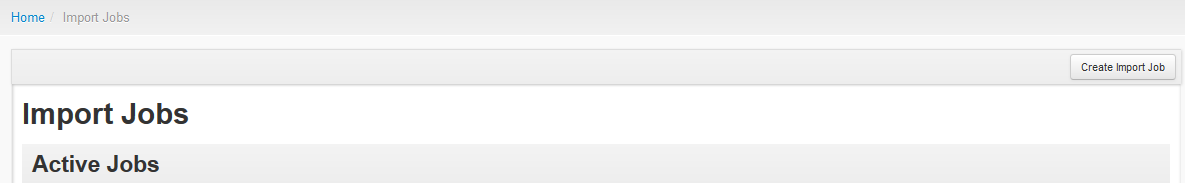
**Import Agent Records in a MARCXML File**

Agent records from an external source (e.g., the OCLC Connexion authorities file) may be imported into ArchivesSpace in a MARCXML file.

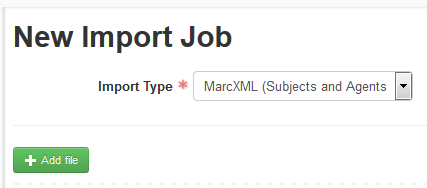
1. Save the MARCXML file you have created from an external source to your desktop.
2. On the ArchivesSpace homepage, click **Import Jobs**.



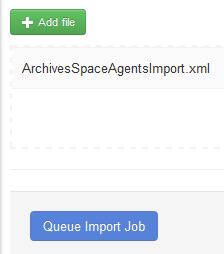
1. Click the **Create Import Job** at the top right of the Import Jobs page.



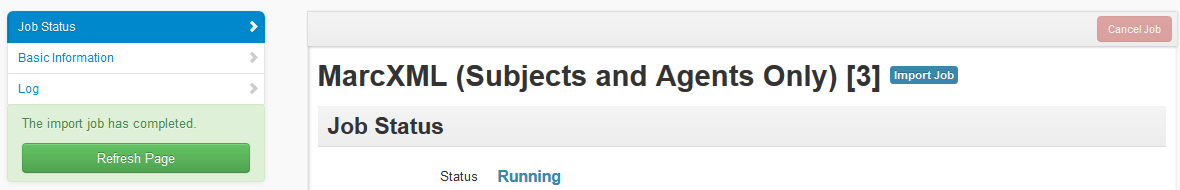
1. Click the arrow at the right of the **Import Type** dropdown list and choose **MARCXML (Subjects and Agents Only)**. Then click **Add File**.



1. Open the MARCXML file to be imported on your desktop. The name of the file will appear beneath the green **Add File** button in ArchivesSpace. Then click the blue **Queue Import Job** button beneath the name of the file.

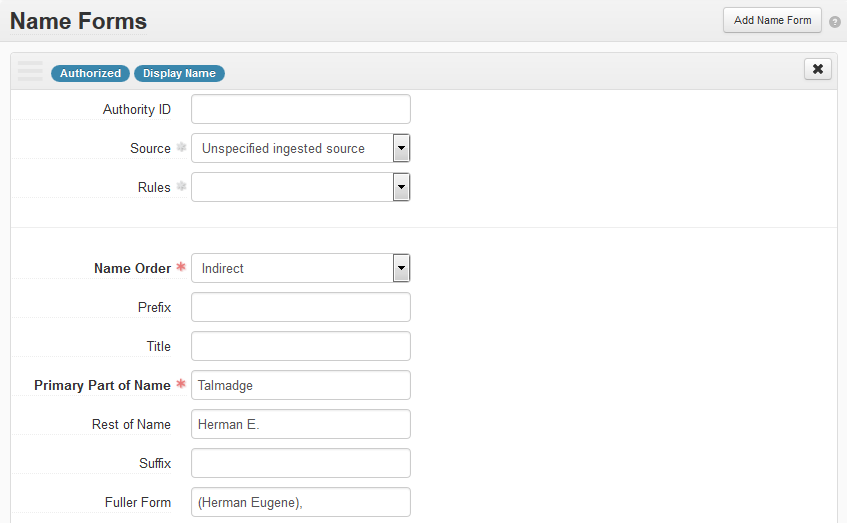


1. ArchivesSpace will import the file, creating a log of import actions. When the file has been imported, a message in green indicating that the import job has completed will appear at the left of the screen.



1. MARCXML records imported from other sources are often minimal, meaning that they include only the required fields. Such records can be enhanced with additional information after import if desired.

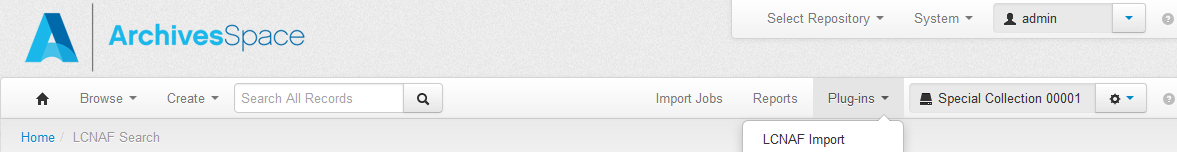
MARCXML agent records may require some cleaning up after import. Imported records may include improper punctuation (e.g. parentheses) in fields like **Fuller Form**, for instance, and **Source** information will be listed as “Unspecified ingested source.”



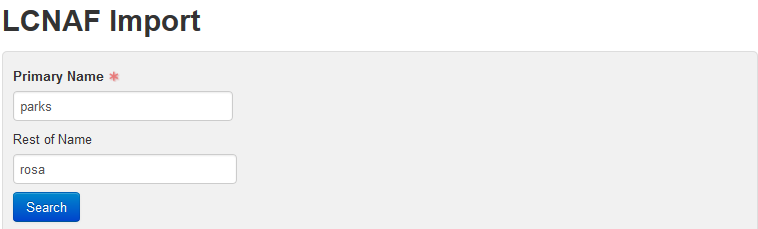
**Import Agent Records with LCNAF Import Plug-in**

Agent records may be imported from the Library of Congress Name Authority File with the **LCNAF Import Plug-In**. Currently the plug-in imports only records for persons.

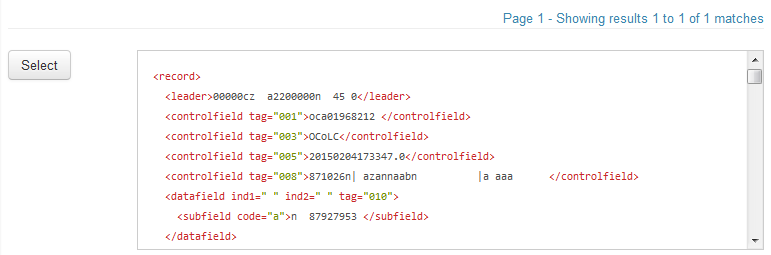
1. On the ArchivesSpace homepage, click the **Plug-ins** dropdown list and choose **LCNAF Import**.



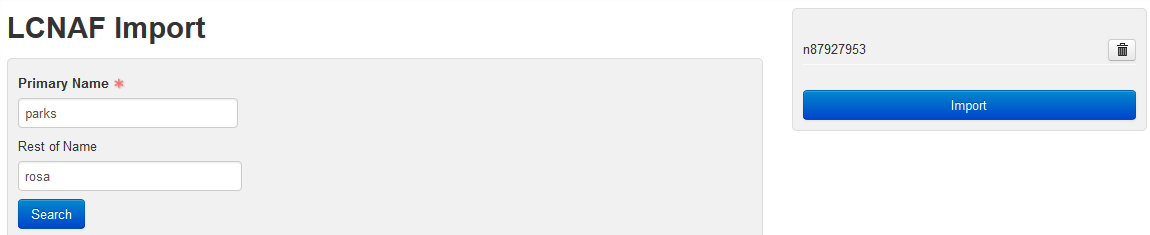
1. On the NAF import page, enter the surname in the **Primary Name** field. Enter the forename in the **Rest of Name** field. Then click **Search**.



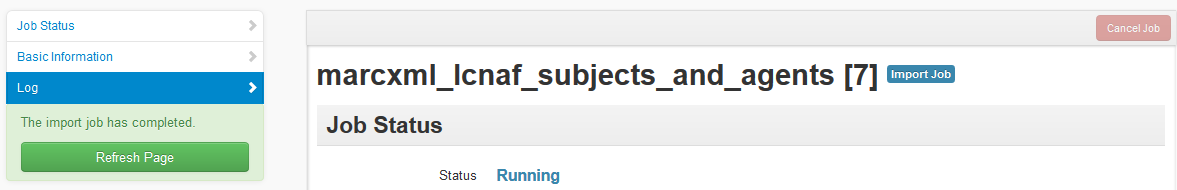
1. Click the **Select** button to the left of the matching record in the search results list.



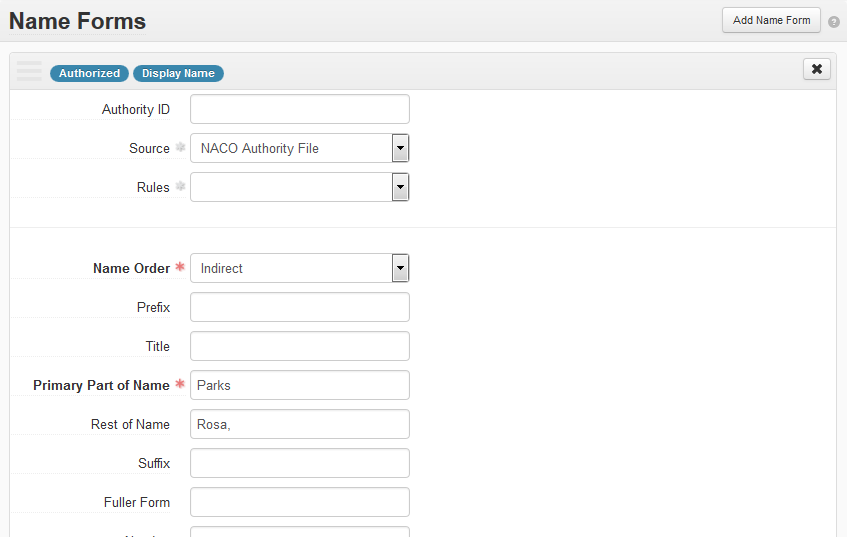
1. Click the blue **Import** button at the right of the screen.



1. ArchivesSpace will import the file, creating a log of import actions. When the file has been imported, a message in green indicating that the import job has completed will appear at the left of the screen.



1. Records from the LCNAF may require some cleanup after import. Imported records may include punctuation not used in ArchivesSpace in fields like **Rest of Name**, for instance.



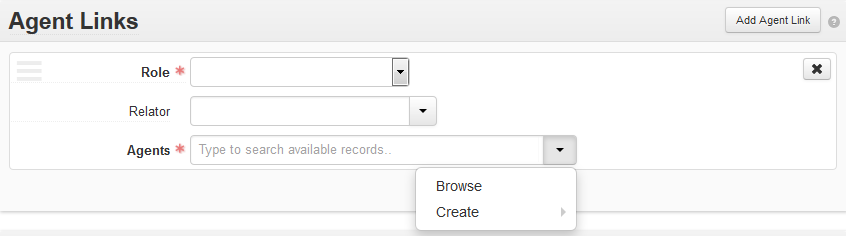
Comma after “Rosa” should be removed

**Create a New Agent Record**

Agent records may be created from within an accession, resource record, digital object record, or from the ArchivesSpace home page.

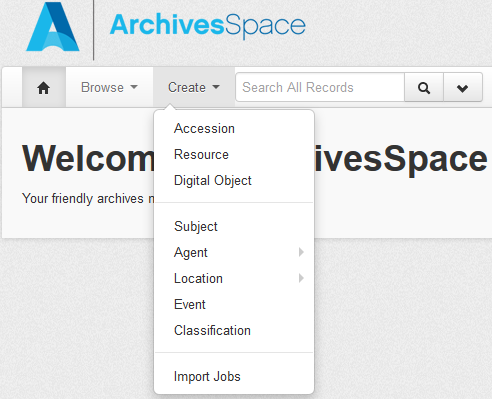
If you are already working in an accession, resource record, or digital object record:

* On the left navigation bar, click **Agent Links**. The record to the right will scroll down to the Agent Links sub-record. Click **Add Agent Link** on the right-hand side of the agent links sub-record. Then click the dropdown list button for **Agents** and select **Create**.



If you are starting from ArchivesSpace home:

* On the main toolbar, click **Create** and select **Agent** from the dropdown menu. From the sidebar dropdown menu to the right, select the type of agent record you wish to create.



**Agent Record Fields**

Each record for a person, family, corporate body, or piece of software is made up of several sub-records, some of which contain fields that must be supplied in order to submit the new record to the database, others of which are optional. When a template for a new agent record is first opened, those sub-records that contain required fields will be open with all their fields exposed, while optional sub-records will be closed. The optional sub-records may be opened and completed by clicking on the “Add…” button (e.g., Add Contact, Add Note, Add Related Agent, etc.) to the right of the sub-record title.



A minimal agent record may be created by filling in only the required fields. The minimal record can be enhanced later with additional fields.

**Required Fields**

Each agent type has several required fields associated with it. You must complete these in order to submit a new agent record to the database.

### Person:

### Primary Part of Name

### Source or Rules

* **Sort Name** (automated if selected)
* **Name Order** (default value of “indirect” provided; you may change to “direct”)

### Family:

* **Family Name**
* **Source** or **Rules**
* **Sort Name** (automated if selected)

### Corporate Entity:

* **Primary Part of Name**
* **Source** or **Rules**
* **Sort Name** (automated if selected)

### Software:

* **Software Name**
* **Source** or **Rules**
* **Sort Name** (automated if selected)

**Basic Information Sub-Record**

The **Basic Information** sub-record determines whether the agent information will be published to the public interface.

**Fields**:

1. **Publish** (check box): When the box is selected, the information in the agent record will be published to the public interface. Leave the box unchecked if you don’t want the name to display publicly.

**Dates of Existence Sub-Record**

The **Dates of Existence** sub-record contains information about the dates in which the agent existed.

**Required Fields if Dates of Existence Sub-Record is Created: Label** and **Type**

**Fields:**

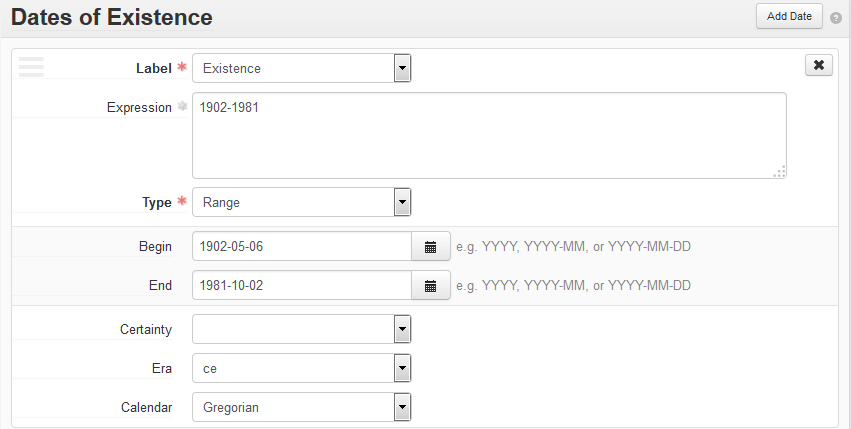
1. **Label** (dropdown list): **Existence** is the only value available.
2. **Expression** (open text field): A natural language expression specifying the date or date range associated with the existence of the person. Examples: 1968-, 1906 March 1-, 1833-1904.
3. **Type** (dropdown list): Select **Range** for a date range, and **Single** for a single date (e.g., a birth date or a death date). Selecting **Single** will cause a new field, **Begin**, to appear below **Type**. Selecting **Range** will trigger the creation of two new fields, **Begin** and **End**.
4. **Begin** (open text field; the calendar icon to the right of the field may be used to select a date automatically): A normalized date (in the form YYYY, YYYY-MM, or YYYY-MM-DD) representing a single date (e.g., a birth date) or the first date in a date range.

Note: A.D. years are expressed with four digits, while B.C. years are expressed

as a negative number (e.g., -214 for 214 B.C.).

1. **End** (open text field; the calendar icon to the right of the field may be used to select a date automatically): A normalized date (in the form YYYY, YYYY-MM, or YYYY-MM-DD) representing a single date (e.g., a date of death) or the last date in a date range.
2. **Certainty** (dropdown list): Indicates the level of confidence for the information given in a date statement. Use this optional field only when qualifying date information that is deemed to be uncertain based on the description or the cataloging rules in use.
3. **Era** (dropdown list): Indicates the period during which years are numbered and dates reckoned, such as B.C. or C.E. The value “ce” is the default.
4. **Calendar** (dropdown list): System of reckoning time, such as the Gregorian calendar or the Julian calendar. The value “Gregorian” is the default.

**Example:** Dates of existence sub-record for **Person** with date of birth 1902 and date of death 1981.



**Name Forms Sub-Record**

The **Name Forms** sub-record contains information about different forms of an agent’s name.

**Fields**:

1. **Authority ID** (open text field): The unique identifier for the name form for an agent within the source from which it was acquired (e.g., a MADS record identifier or EAC record identifier). The identifier may be represented as a URI.
2. **Source** (dropdown list): The authoritative source from which the name was taken. Four default values are available:

**Local sources**: Designates an authority file created and maintained at your repository.

**NACO Authority File**

**NAD / ARK II Name Authority Database**: Designates the National Archives Database of Sweden

**Union List of Artist Names**

1. **Rules** (dropdown list): Indicates the data content standard used to formulate the name entry. Use **Rules** only when a name has not been found in an existing authority file and must be formulated locally. Four default values are available in the dropdown list:

**Anglo-American Cataloging Rules**

**Describing Archives (DACS): a Content Standard**

**Local rules**: Designates a data content standard created and maintained locally by your repository

**Resource Description and Access**

1. **Software Name** (open text field; not used on Person, Corporate Entity, or Family records): Indicates the name of a software package. Example:
   * ORB (Computer file) *(for ORB (Computer file)[software])*
2. **Name Order** (dropdown list): Indicates whether the name should be displayed in inverted (last name, first name) order or in direct order (first name last name).
3. **Prefix** (open text field): Enter any term associated with a name that in normative use would precede the entire name (e.g., Mrs., Mr., Dr.).
4. **Title** (open text field): Enter a title that is part of the name. Examples:
   * Sir *(for Churchill, Winston, Sir, 1874-1965 [person])*
   * Chief *(for Black Foot, Chief, d. 1877 [person])*
   * Emperor of the East *(for John II Comnenus. Emperor of the East [person])*
5. **Primary Part of Name** (open text field; called **Family Name** on **Family** records; not used on **Software** records): The primary part of a name form (e.g. a last name or surname of a person). Separates the principal sorting element of the name from the remainder of the name, which is generally input in the **Rest of Name** field. Examples:
   * Churchill *(for Churchill, Winston, Sir, 1874-1965 [person])*
   * Black Foot *(for Black Foot, Chief, d. 1877 [person])*
   * Sackville-West *(for Sackville-West, V. (Victoria), 1892-1962 [person])*
   * Agrant (for Agrant *(Family : 1894-1976 : S.D.) [family])*
   * International Business Machines *(for International Business Machines. Microelectronics Division [corporate entity])*
6. **Rest of Name** (open text field): The first name additional names (e.g., middle names) for the person named in the record.
   * Winston *(for Churchill, Winston, Sir, 1874-1965 [person])*
   * Humphrey *(for Ward, Humphrey, Mrs., 1851-1920 [person])*
   * V. *(for Sackville-West, V. (Victoria), 1892-1962 [person])*
7. **Suffix** (open text field): A term following a name that qualifies the name but is not a title. Example:
   * père *(for Dumas, Alexandre, père [person])*
8. **Fuller Form** (open text field): The fuller form of first and middle names, when abbreviated. Example:
   * Hilda Doolittle *(for H.D. (Hilda Doolittle), 1886-1961 [person])*
   * Victoria *(for Sackville-West, V. (Victoria), 1892-1962 [person])*
9. **Number** (open text field): A number, sometimes with a term, that qualifies the name.
   * III *(for Beck, William Henry, III, 1925- [person])*
10. **Subordinate Name 1** (open text field; not used on records for Persons, Families, or Software): If needed, add the subordinate element that immediately follows the primary part of the name of a corporate entity. Example:
    * Microelectronics Division *(for International Business Machines. Microelectronics Division [corporate entity])*
11. **Subordinate Name 2** (open text field; not used on records for Persons, Families, or Software): If needed, add the subordinate element that immediately follows the primary part of the name of a corporate entity. Example:
    * Battalion, Royal Highlanders of Canada, 13th (for *Canada. Canadian Army. Battalion, Royal Highlanders of Canada, 13th [corporate entity]*)
12. **Manufacturer** (open text field; found on Software records only): The manufacturer, creator, or other responsible party for a software package’s distribution, development, or maintenance. Example:
    * American Institute of Aeronautics and Astronautics (for *ORB (Computer file)[software])*
13. **Qualifier** (open text field): A term or phrase for distinguishing two name forms identical in all other respects but identifying two different entities. The term may be a date, a place, or any other suitable descriptor. Examples:
    * Musician *(for Balogh, István (Musician)[person])*
    * Florists *(for Smith family (Florists) [corporate entity])*
    * Bronx, New York, N.Y. *(for St. James Church (Bronx, New York, N.Y.)[corporate entity])*
14. **Version** (open text field; found on Software records only): Indicates the version number or other indicator for a specific version of a software package. Example:
    * 3.0 (for *OCLC CJK [software]*)
15. **Sort Name** (automatically generated): After you save the agent record, the system generates the contents of this field. This version of the name is a concatenation of all the parts of the name provided in the given agent record. Used for display purposes in the application and for some exports. The sort name may be edited by clearing the "Automatically generate" check box and then entering the form of the sort name desired.

**Date(s) of Name Use Sub-Sub Record**

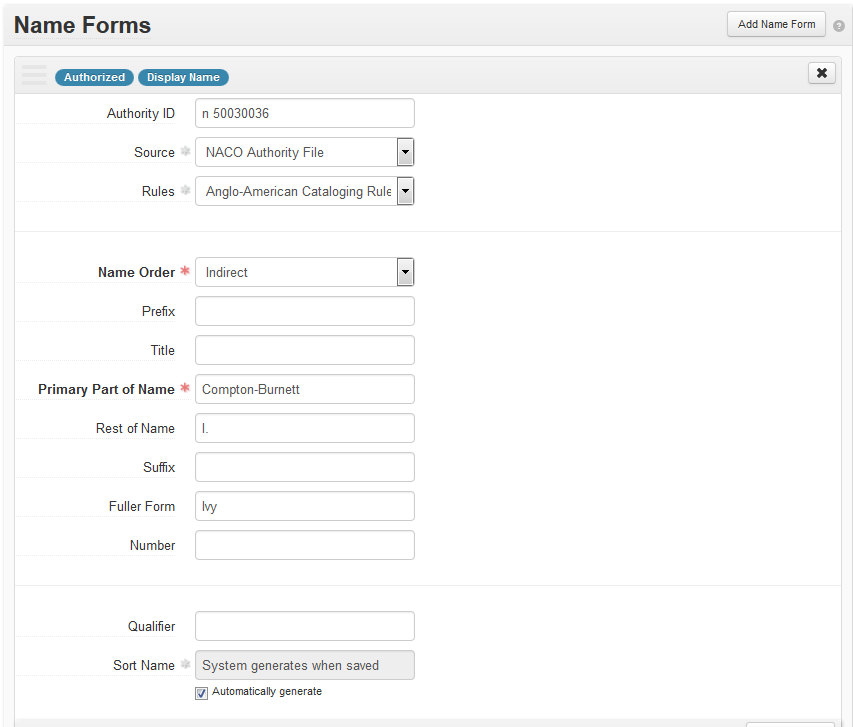
A part of the **Name Forms** sub-record, the **Date(s) of Name Use** records information about the dates during which the name of a particular agent was in use. This record might be used, for example, to record the dates during which a corporate entity that has changed its name used a preceding name.

**Fields**:

1. **Label** (dropdown list): The only available value is **Usage**.
2. **Expression** (open text field): A natural language expression specifying the date or date range when the name for the agent was used. Examples: 1968-, 1953 March 1-, 1925-1964.
3. **Type** (dropdown list): Select **Range** for a date range, and **Single** for a single date (e.g., a birth date or a death date). Selecting **Single** will cause a new field, **Begin**, to appear below **Type**. Selecting **Range** will trigger the creation of two new fields, **Begin** and **End.**
4. **Begin** (open text field; or the calendar icon to the right of the field may be used to select a date automatically): A normalized date (in the form YYYY, YYYY-MM, or YYYY-MM-DD) representing a single date (e.g., a birth date) or the first date in a date range.
5. **End** (open text field; or the calendar icon to the right of the field may be used to select a date automatically): A normalized date (in the form YYYY, YYYY-MM, or YYYY-MM-DD) representing a single date (e.g., a date of death) or the last date in a date range.
6. **Certainty** (dropdown list): Indicates the level of confidence for the information given in a date statement. Use this optional field only when qualifying date information that is deemed to be uncertain based on the description or the cataloging rules in use.
7. **Era** (dropdown list): Indicates the period during which years are numbered and dates reckoned, such as B.C. or C.E. The value “ce” is the default.
8. **Calendar** (dropdown list): System of reckoning time, such as the Gregorian calendar or the Julian calendar. The value “Gregorian” is the default.

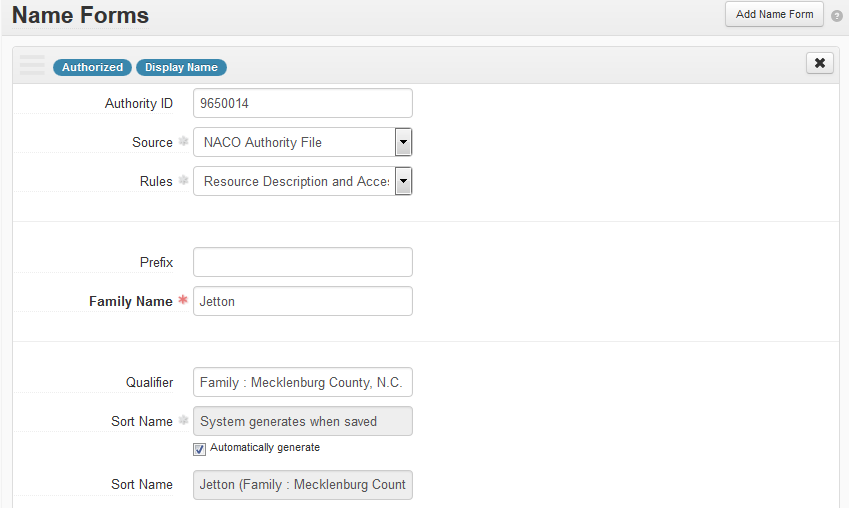
**Example 1**:

Name Forms sub-record for Personal Name: **Compton-Burnett, I. (Ivy), 1884-1969**.



**Example 2:**

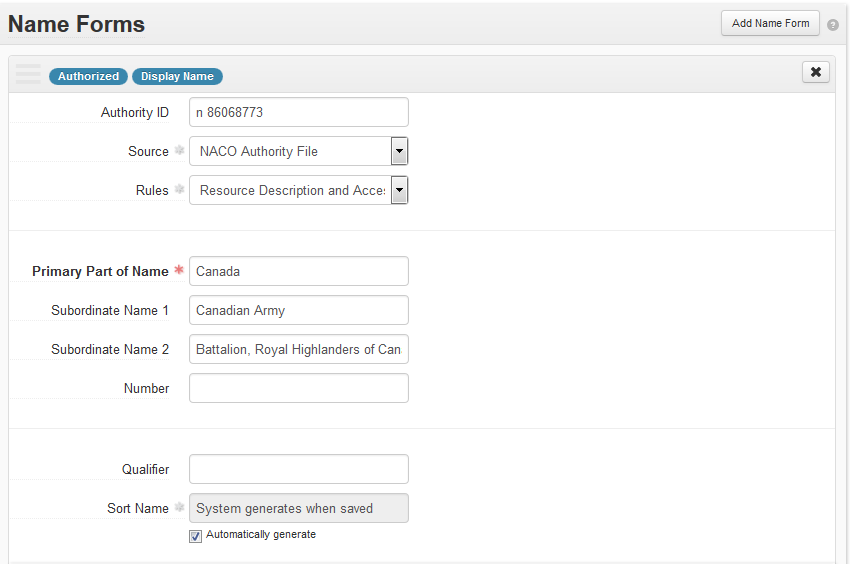
Name Forms sub-record for Family: **Jetton (Family : Mecklenburg County, N.C.)**.



**Example 3:**

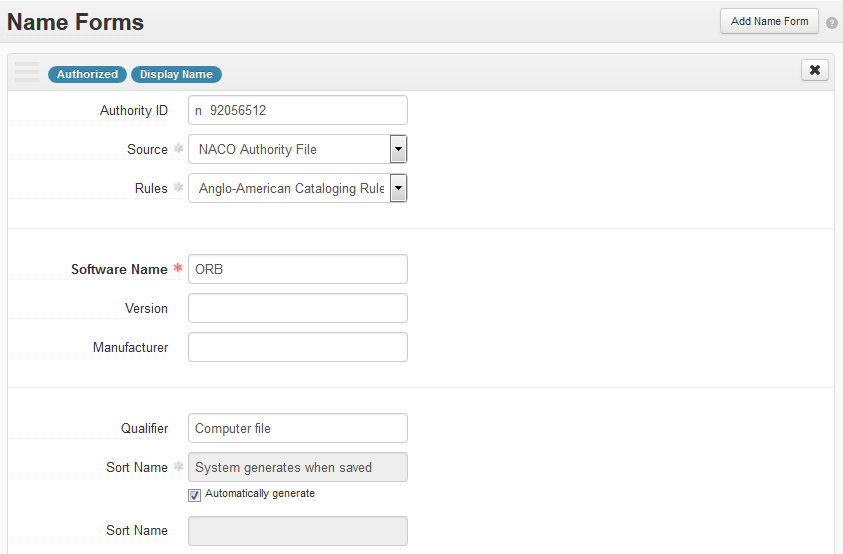
Name Forms sub-record for Corporate Entity: **Canada. Canadian Army. Battalion,**

**Royal Highlanders of Canada, 13th**.



Example 4:

Name Forms sub-record for Software: **ORB (Computer file)**.



**Contact Details Sub-Record**

The **Contact Details** sub-record contains contact information for the entity recorded in the main record.

**Fields**:

1. **Contact Name** (open text field): Name of the person serving as contact for the entity in the main record.
2. **Salutation** (dropdown list): Salutation for the contact person (e.g., Dr., Mrs., Mr.).
3. **Address** (open text field): Address for the contact person.
4. **City** (open text field): City in which the contact person is located.
5. **State/Region** (open text field): State or Region in which the contact person is located.
6. **Country** (open text field): Country in which the contact person is located.
7. **Post Code** (open text field): Mail or zip code for the contact person’s address.
8. **Telephone** (open text field): Telephone number for the contact person.
9. **Telephone Extension** (open text field): Telephone number extension for the contact person.
10. **Fax** (open text field): Fax number for the contact person.
11. **E-mail** (open text field): Email address for the contact person.
12. **Contact notes** (open text field): Additional notes or information about the contact person.

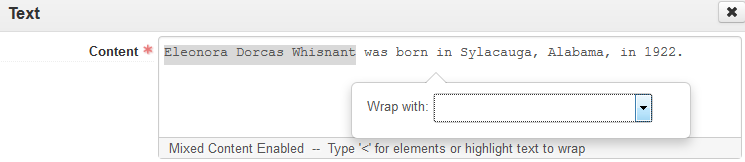
**Notes Sub-Record**

The **Notes** sub-record contains additional descriptive information about an agent, such as a biographical note or an administrative history.

Required fields: **Note Type, Content**

**Fields:**

1. **Note Type** (dropdown list): Note types are used to guide the export of note contents to certain elements in specific data formats. The only available value is **Biographical / Historical** for all agent types.
2. **Persistent ID** (automatically generated): This value is automatically generated by the system when an agent record is created.
3. **Label** (open text field): A label or heading for the specific note. If a label is not used, the value chosen from the dropdown menu in **Note Type** will be used as the label wherever required.
4. **Publish** (check box): When the box is selected, the information in the **Notes** sub-record will be published to the public interface. Leave it unchecked if you don’t want the note to display.
5. **Content** (open text): Located in **Text** section of the **Notes** sub-record, this field contains the content of the note. The Content note allows for mixed content, which includes both text and XML markup. Typing “<” will trigger the appearance of a dropdown list of EAD elements (e.g., language, blockquote, date, function, occupation, persname, etc.) that can be used to wrap elements of the Content text. Highlighting text in Content will cause the same dropdown list of EAD elements to appear.



**Related Agents Sub-Record**

The **Related Agents** sub-record contains information about other agents with which the agent described by the record may be associated (e.g., former and later name relationships, parent/child relationships, other associative relationships).

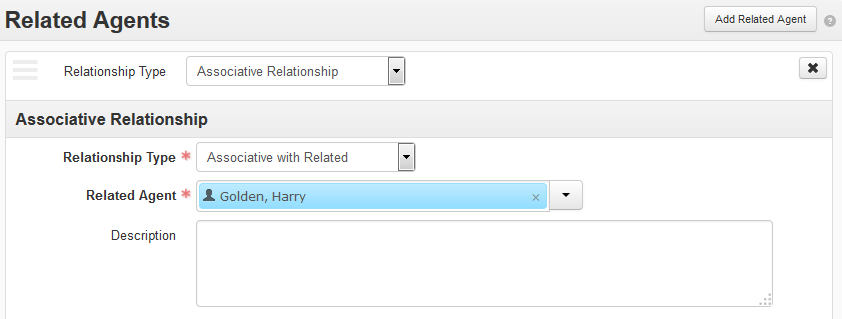
**Fields**:

1. **Relationship Type** (dropdown list): Specifies the type of relationship recorded. Choosing a value from this dropdown list will trigger the appearance of a second **Relationship Type** field with a dropdown list where the more general relationship type described here can be further specified. Values in both lists are as follows:

|  |  |
| --- | --- |
| **1st Relationship Type Field** | **2nd Relationship Type Field** |
| Associative Relationship | Associative with Related |
| Earlier/Later Relationship | Earlier Form of Related  Later Form of Related |
| Parent/Child Relationship | Child of Related  Parent of Related |

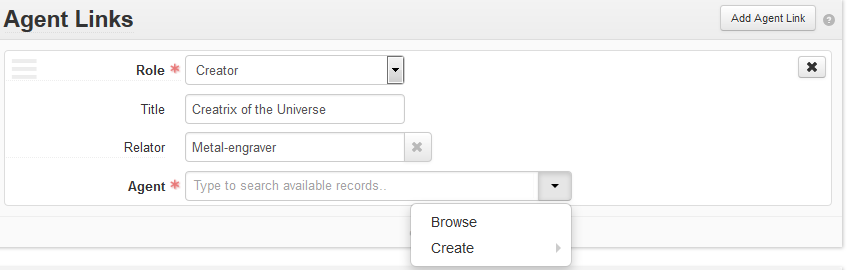
1. **Related Agent** (dropdown list): Links the Agent represented by the current record with other related Agent records.

You can create an agent link by typing the first few letters of the agent’s name in the Related Agents field and clicking on it. The selected agent will appear in the field, highlighted in blue. To remove it, click on the small “x” at the lower right-hand corner of the field.

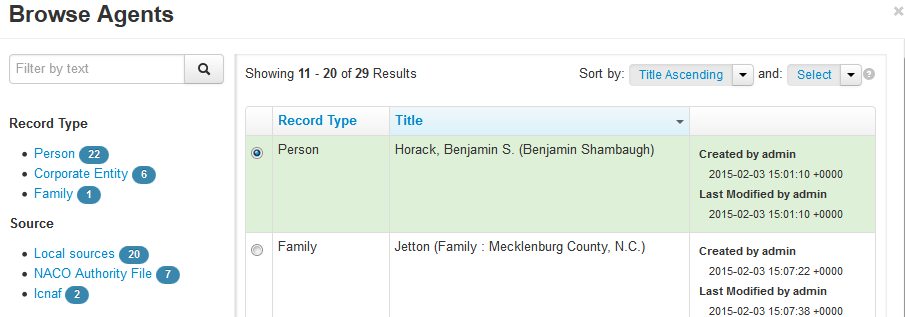


Alternative methods of creating a related agent link involve using **Browse** to locate an agent record or **Create** to create a new agent record if the desired record does not yet exist in the database.

1. Click on the dropdown arrow to the right of the field and choose **Browse** or **Create**.



1. Selecting **Browse** will cause a pop-up box to appear with a list of all the agent records available in your ArchivesSpace instance.
2. To link the agent record to a related agent, click the radio button to the left of the appropriate agent name. Then click **Link to Agents** at the bottom of the pop-up box.





1. Choose **Create** from the dropdown menu if no agent record is available for the agent you wish to link. Follow the instructions in **Create a New Agent**.
2. **Description** (open text field): A description of the relationship, if warranted.

**External Documents Sub-Record**

The **External Documents** sub-record contains links to any external documentation about the agent (e.g., biographical files, reference works, etc.).

**Fields**:

1. **Title** (open text field): The title of an external document referenced from the accession record. The document may be of any form or content (e.g., web accessible file, a network accessible file, a file on the same computer as the application, etc.).
2. **Location** (open text field): The location of the file, ideally a resolvable URI. Examples: <http://www.archivesspace.org/membershipfile:///c:/path/to/the%20file.txt>.
3. **Publish** (open text field): A selected check box indicates that this External Document should be published to the public interface.