Harvard Library

ArchivesSpace Container Management Enhancement Proposal

Revised
December 10, 2019

Proposal Background

Large, multi-repository institutions using a single instance of ArchivesSpace have particular challenges finding, viewing, and updating information related to containers and locations in the system.

The Harvard Library is proposing to make enhancements to the existing container management features in the ArchivesSpace staff interface to address some of these needs. Subject to community review, these enhancements will be contributed to the core code.

While the specific changes Harvard proposes are more fully described in the user stories and mockups below, this proposal seeks to address the following higher-level repository needs:

- Repositories with a large number of Location records need additional options for sorting, filtering, and viewing Locations to more easily find and manage those records.

- In a multi-repository configuration, staff users need a more effective way to find container and location information that is relevant to their own repository. Enabling staff to filter Locations and Container Profiles by repository will allow for more efficient access to appropriate container and location management options.

- Some repositories need to be able to record and to search by barcode for Child Containers in order to effectively manage existing physical containers.

- When viewing the Top Containers in a Location, staff need to be able to see additional information about each container and about the Resources associated with Archival Objects in the container to understand what holdings are housed in that particular location.

- When viewing the contents of a Top Container, staff need to be able to see information about the Resources associated with Archival Objects in the container. In some cases all objects will be associated with a single Resource; in other cases, objects associated with different Resources may be in the same container.

- Staff need efficient ways to link multiple Archival Objects to Top Containers and to associate Locations with Top Containers in bulk.

Database Field Additions

The Harvard Library proposes adding the following fields, listed by existing database table, to the ArchivesSpace database:

- **Container Profiles**
    - Repository (optional, repeatable)

- **Top Containers**
    - Note (optional, not repeatable)

- **Container Instances**
    - Child Container Barcode (optional, not repeatable)

User Stories: Browsing Locations

When browsing Locations, I want to be able to find the Locations that apply to my repository more quickly and easily.

Action:

- Implement a facet based on the Repository field in Browse Locations to let me limit my results by repository.

When Browsing Locations, I need to be able to navigate through a predictable, reliable sequence of results

Action: Improve the results display by either

- Making the sort on column 1 sensitive to mixed alphabetic and numeric content

OR

- Removing Location Coordinates from the Title display string, i.e., retaining a concatenation of Building, Floor, Room, and Area;
- displaying each Location Coordinate Label and Indicator in a separate, sortable column (6 coordinate columns total);
- displaying the Location Profile and repository Holdings, as currently shown
- removing separate columns for Building, Floor, Room, Area; and
- removing the column displaying record creation and update information.

User Stories: Using and Managing Locations

When viewing a Location record, I want to readily evaluate the containers from information in the Linked Records table.

Actions:

- Add a sortable column for Identifier + Resource Title / Identifier + Accession Title
    - If there are multiple resources or accessions in a container, display all as a bulleted list, in the same way they would appear for shared Top Containers from the Manage Top Containers results
- Add new, sortable columns for Top Container Type and Container Barcode
- Remove the Record Type column and the column displaying record creation and update information

I need the ability to merge duplicate Location records, retaining metadata from the preferred record and, where applicable, changing links in Top Containers from the non-preferred Location(s) to the preferred Location. Both bulk and individual merges are desirable, with bulk being a higher priority.

Action: Coordinate with ArchivesSpace staff to determine which method for implementing bulk merge of Locations most consistent with comparable record merge functions in ArchivesSpace.

User Stories: Container Profiles

When managing Container Profiles, I want to be able to filter results to profiles used by my selected repository.

Actions:

- Add an optional Repository field to the Container Profile record
- Add a facet based on the Repository field on the Manage Container Profiles results page

As an archivist, I want to be able to share container profile records that are used by other repositories, to improve cross-repository analysis and planning.

Action: Make the new Repository field in the Container Profile record repeatable.

User Stories: Manage Top Containers

As a staff member, I need to be able to view a Top Container record chosen from a list of Top Container search results, and then use the browser Back button to be returned to my location in my search results, including any sort that had been applied.

> Action: Reissue my search, sort, and restore my location on page when I use the Back button from a Top Container accessed through the Manage Top Container screen.

In the Manage Top Containers results table, I want the Indicator column to sort alphanumerically in order to review containers more efficiently.

> Action: Correct inaccurate alphanumeric sorting.

User Stories: Bulk or Batch Operations on Top Containers (1)

Because of past practice, thousands of Archival Objects in our installation lack Top Containers. As an archivist I need to create new Top Containers, associate them with existing Locations, and link them to multiple existing Archival Objects in an efficient way.

This could be accomplished through a spreadsheet or CSV upload, based on a CSV download of selected archival objects, edited to include Top Container information and a Location record database number.

Uploads limited to archival objects in one resource at a time would be acceptable.

The current CSV download for Archival Objects is not based on selected records (only complete search result) and is unwieldy due to the overwhelming number of fields.

Proposed fields needed for this process are:

1. Archival object database number (for reference only – not editable)
2. Archival object ref id (for reference only – not editable)
3. Archival object component unique identifier (for reference only – not editable)
4. Archival object title (for reference only – not editable)
5. Resource record title (for reference only – not editable)
6. Resource record identifier (for reference only – not editable)
7. Instance type (would be null in download)
8. Top container type (would be null in download)
9. Top container indicator (would be null in download)
10. Top container barcode (would be null in download)
11. Location record database number (would be null in download)

Actions:

- Implement an efficient functional and technical approach to be designed in consultation with ArchivesSpace staff.

User Stories: Bulk Operations on Top Containers (2)

I need to add Locations to existing Top Containers efficiently in bulk in a single spreadsheet or CSV upload.

A bulk upload would first require the ability to download information for selected Top Containers as CSV.

Proposed fields, at a minimum:

- Accession/Resource Title and Ref ID (for reference only – not editable)
- Top Container Type (for reference only – not editable)
- Top Container Indicator (for reference only – not editable)
- Top Container Barcode (for reference only – not editable)
- Top Container database number (for reference only – not editable)
- Location database number (would be null in download)

Actions:

- Implement an efficient functional and technical approach to be designed in consultation with ArchivesSpace staff.

I need to be able to delete barcodes from Top Containers in bulk.

Action:

- Either add a Delete Barcodes option to Bulk Operations in Manage Top Containers as a new, standalone function in the Bulk Operations list,

OR

- add a Delete Barcode column with checkboxes (and a checkbox for all) within the existing Rapid Barcode Entry function screen

User Stories: Top Containers

When viewing a Top Container record, I want to see the Container Type field above the Indicator, consistent with the order of fields when creating or editing a Top Container.

> Action: Display Container Type above the Indicator in the Top Container View

When viewing a Top Container record, I need to see additional specific and contextual information about linked records in the Linked Records table in order to understand the contents without opening each linked record individually.

> Actions:
> - Retain columns for Record Type, Title, and Identifier, as currently shown;
> - Add new sortable columns for Child Container Type and Child Indicator. Include Child Barcode if space permits;
> - Add a new column for "Found In" breadcrumbs;
> - Remove the column displaying record creation and update information.
> - If necessary and feasible, make the Linked Records table wider to accommodate the display of this additional information

When managing a Top Container record, I need to be able to record additional, variable information for future reference.

> Action: Add a Note field to the Top Container record. The Note field does not need to be indexed.

User Stories: Container Instances

When searching in the Top Container field in a Container Instance, I want to be able to search by the full container name or by any parts of it (e.g., Volume Michigan 32; Volume 32; 32).

> Action: Investigate and correct cause(s) of inconsistent and unreliable results.

I want to be able to add a barcode to a Child Container to facilitate inventory control.

> Actions:
> - Add a Child Container Barcode field (optional, non-repeatable) to the Container Instance record.
> - Include the Child Container Barcode in the general keyword index and in the Barcode index for Top Containers.

When viewing a Container Instance, display the current location of the Container.

> Action: Retrieve and display the current Location of the linked container, consistent with the display of Current Location in the Manage Top Containers results table.

When "Browse Containers" is selected during Instance creation, it should open directly into the results page for Top Containers associated with the resource.

> Action: Display the Browse Container pop-up with the search option still available and the results of the search for the Resource prepopulated.

Location Record

Baker Library, Basement, Stacks [Row: 67, Bay: 1, Shelf: 8] `Location`

Building	Baker Library
Title	Baker Library, Basement, Stacks [Row: 67, Bay: 1, Shelf: 8]
Floor	Basement
Room	Stacks
Coordinate Label	Row

Columns added for Container Type, Container Indicator, and Container Barcode

Linked Records

Go to Search Results

Showing **1 - 1** of **1** Results

Sort by: Select

Resource/Accession	Container Type	Container Indicator	Container Barcode	
Arch GA9.75 Andrew F. Brimmer papers	Box	481	BA01KN	View Edit

Replace Record Type column with (Identifier + Resource Title) or (Identifier + Accession Title)

Browse Locations

Browse Locations

Sort by: Select ▾

	Coordinate Label 1	Coordinate Indicator 1	Coordinate Label 2	Coordinate Indicator 2	Coordinate Label 3	Coordinate Indicator 3	Location Profile	BAK Holdings	
☐ Baker Library, Basement, Stacks	Row	1	Bay	1	Shelf	1		3 top containers.	View Edit
Stacks	Row	1	Bay	1	Shelf	2		No holdi for this reposito	View Edit
☐ Baker Library, Basement, Stacks	Row	1	Bay	1	Shelf	3		No holdings for this repository. 8	View Edit

Results filtered by Repository facet

Container Profile Record

Container Profiles can be associated with a repository and filtered by the user's repository

Top Container Record

Box S 481 9: [HBA01KN] Top Container

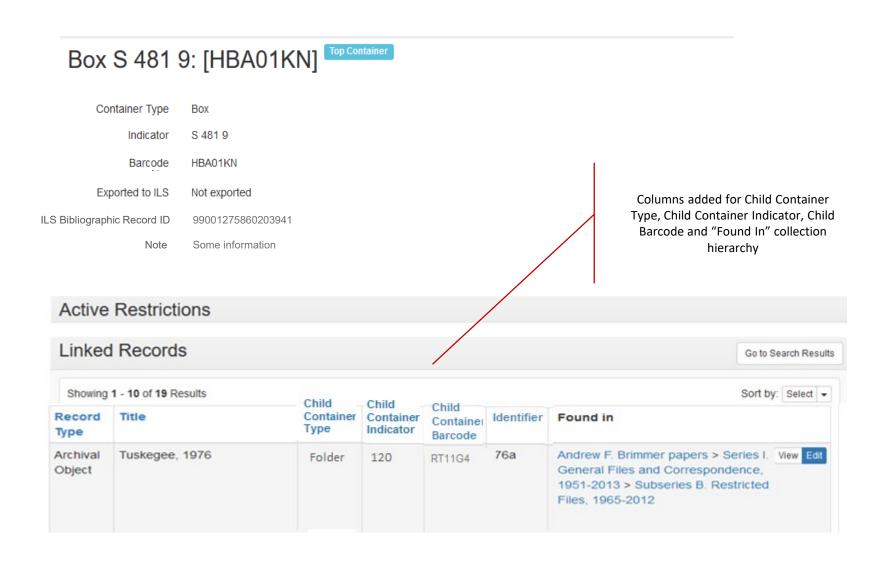|	
Container Type	Box
Indicator	S 481 9
Barcode	HBA01KN
Exported to ILS	Not exported
ILS Bibliographic Record ID	99001275860203941
Note	Some information

Container type appears above the indicator

Containers can have a note

Top Container Record – Linked Records

Columns added for Child Container Type, Child Container Indicator, Child Barcode and "Found In" collection hierarchy

Container Instance

Instances

Mixed Materials   Box S 481 9: [HBA01KN]

Type	Mixed Materials
Is Representative?	False
Top Container	📺 Box S 481 9: [HBA01KN]
Child Type	Folder
Child Indicator	4
Child Barcode	389709
Location	⊙ Harvard Depository [HD]

A child container can include a barcode

The container's current location displays with the instance