

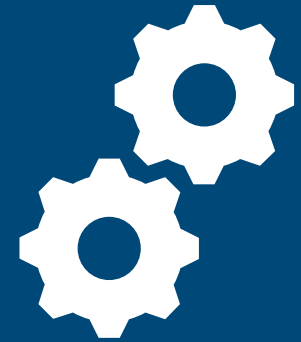
# Pro-tips, tricks, and shortcuts!

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**ATLAS  
SYSTEMS**

*Library Excellence Through Efficiency*



Valerie Addonizio

2021 August 04

Screenshots and functionality from v3.0.1

# Hello!

- This is a presentation where I try and reach out to **everyone**
- **With a lot of information**
- These slides are meant to be referenced
- Little of this is “new”
  - Some of you may be bored
- That said, watch out for Pusheen’s Super Tips!!
  - These are techy tips for a particular audience



# Hello!



- Based on experience
  - Advice, both general (listserv, tech docs) and one-on-one (help!)
  - Troubleshooting and questions from hosted and migrating customers
- Much gratitude to the community, colleagues, and friends
- I make simplifications!
- I state things with **sophomoric confidence!**
- And I welcome corrections and clarifications!

I am a better cat  
for knowing you!



I'm not starting with a tip  
I am starting with a concept

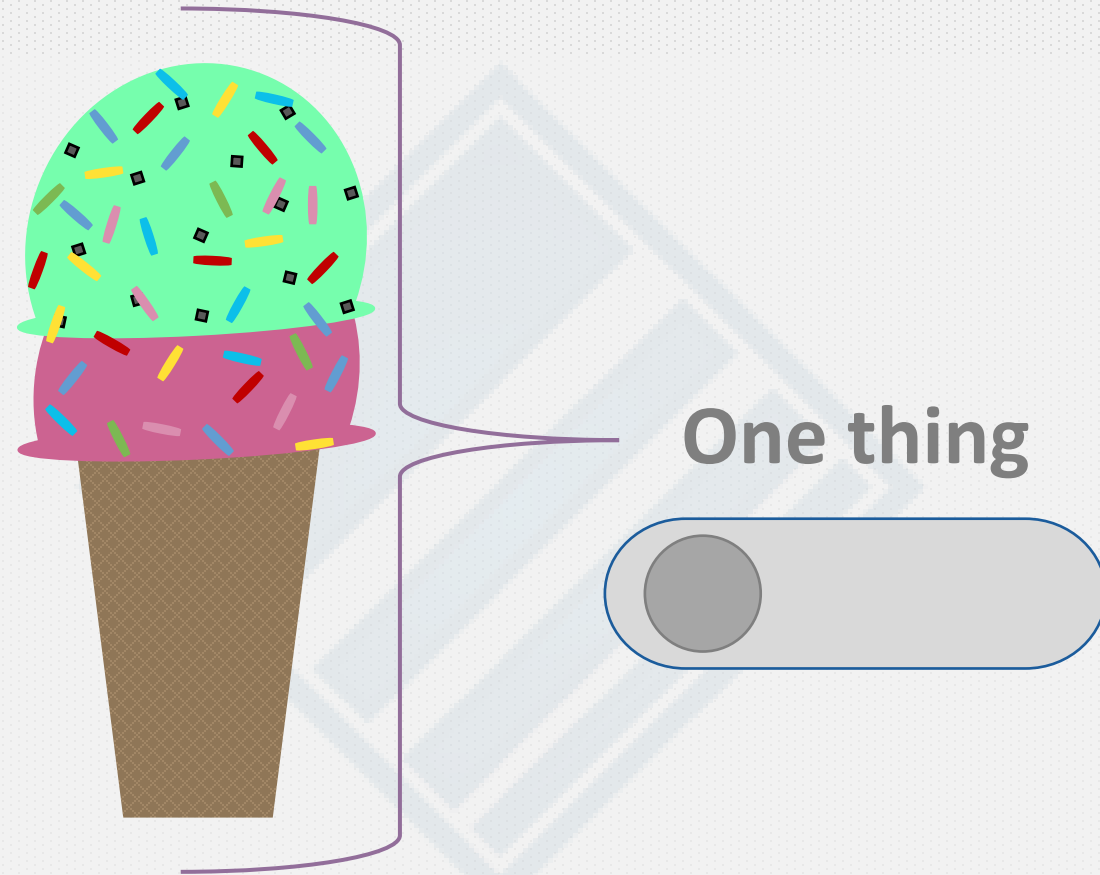
Oh, please do.

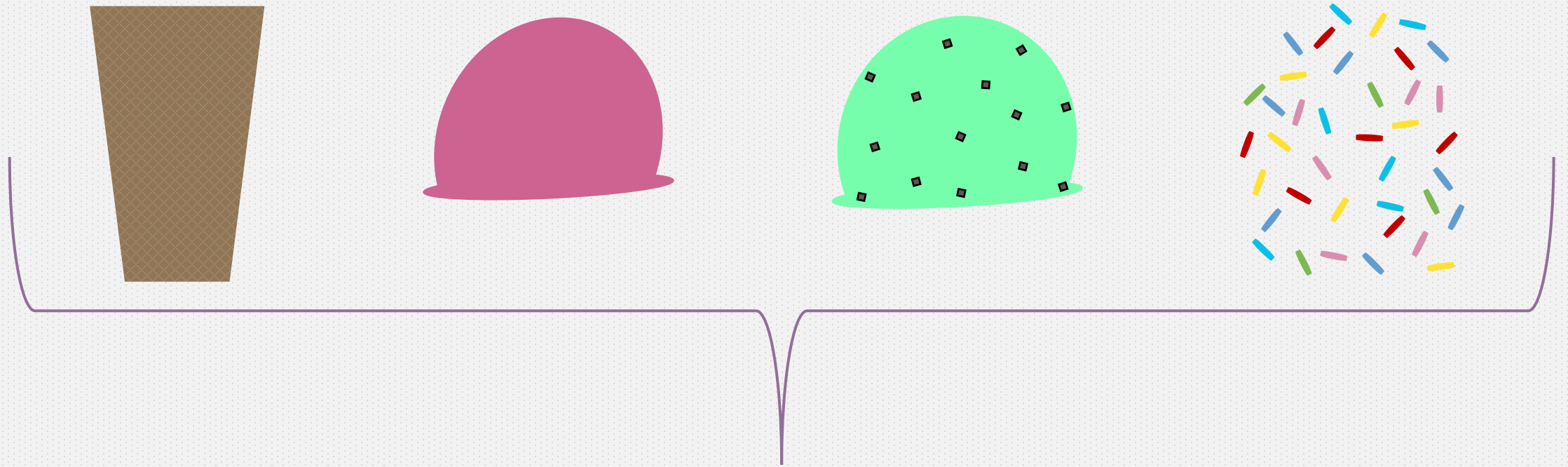




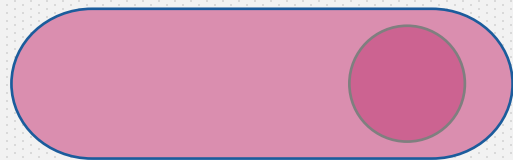
# Flipping the Ice Cream Switch

# The Ice Cream Switch





**Multiple things**



# “a finding aid”

The Morris Canal  
Company Photographs

Series I: Prints

Box 1:

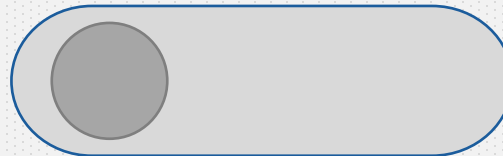
Folder 1.....1907  
Folder 2.....1908  
Folder 3.....1909  
Folder 4.....1910  
Folder 5.....1911  
Folder 6.....1912  
Folder 7.....1913

Paper

```
<archdesc level="collection">
  <did>
    <repository>
      <corpname>test</corpname>
    </repository>
    <unittitle>Morris Canal Company papers</unittitle>
    <unitid>MSS.0001</unitid>
    <physdesc altrender="whole">
      <extent altrender="materialtype spaceoccupied">2.5 Linear Feet</
extent>
    </physdesc>
    <unitdate normal="1880/1920" type="inclusive">1880-
1920</unitdate>
    <langmaterial>
      <language langcode="eng" scriptcode="Latn">English</language>
    </langmaterial>
  </did>
```

<EAD>

One thing

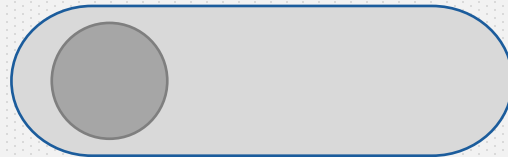




# “a finding aid”

Morris Canal Company records	Collection		
▼ Series 1: Photographs, 1888-1922	Series		
▼ Subseries 1: Prints, 1888-1922	Sub-Series		
Waterloo Village, 1888	File	Mixed Materials	Box: 1, Folder: 1
Easton, Pennsylvania, 1900	File	Mixed Materials	Box: 1, Folder: 2
Newark, New Jersey, 1911	File	Mixed Materials	Box: 1, Folder: 3
Plane #10 East, 1922	File	Mixed Materials	Box: 1, Folder: 4
▼ Subseries 2: Albums, 1900-1920	Sub-Series		
Photo album: Canal boats, 1900-1920	File	Mixed Materials	Box: 2

One thing



# “a finding aid”

1 resource record

7 subjects

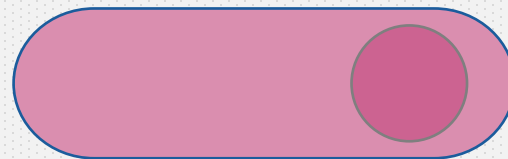
15 digital objects

3 agents

17 archival objects

3 top containers

**Multiple things**



# “a finding aid”

1 resource record

7 subjects

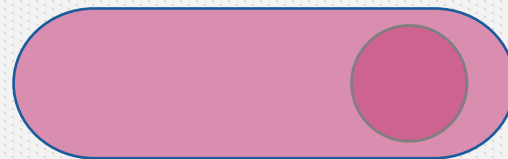
15 digital objects

3 agents

17 archival objects

3 top containers

Multiple things



# Evolution of the Finding Aid

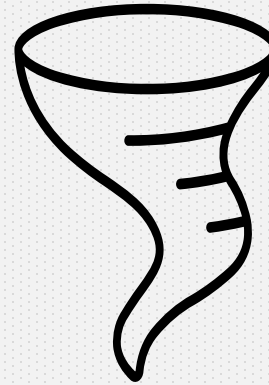
The Morris Canal  
Company Photographs

Series I: Prints

Box 1:

Folder 1.....1907  
Folder 2.....1908  
Folder 3.....1909  
Folder 4.....1910  
Folder 5.....1911  
Folder 6.....1912  
Folder 7.....1913

```
<archdesc level="collection">  
<did>  
<repository>  
<corpname>test</corpname>  
</repository>  
<unittitle>Morris Canal Company papers</unittitle>  
<unitid>MSS.0001</unitid>  
<physdesc altrender="whole">  
<extent altrender="materialtype spaceoccupied">2.5 Linear Feet</  
extent>  
</physdesc>  
<unitdate normal="1880/1920" type="inclusive">1880-  
1920</unitdate>  
<langmaterial>  
<language langcode="eng" scriptcode="Latn">English</language>  
</langmaterial>  
</did>
```



1 resource record

3 agents

7 subjects

17 archival objects

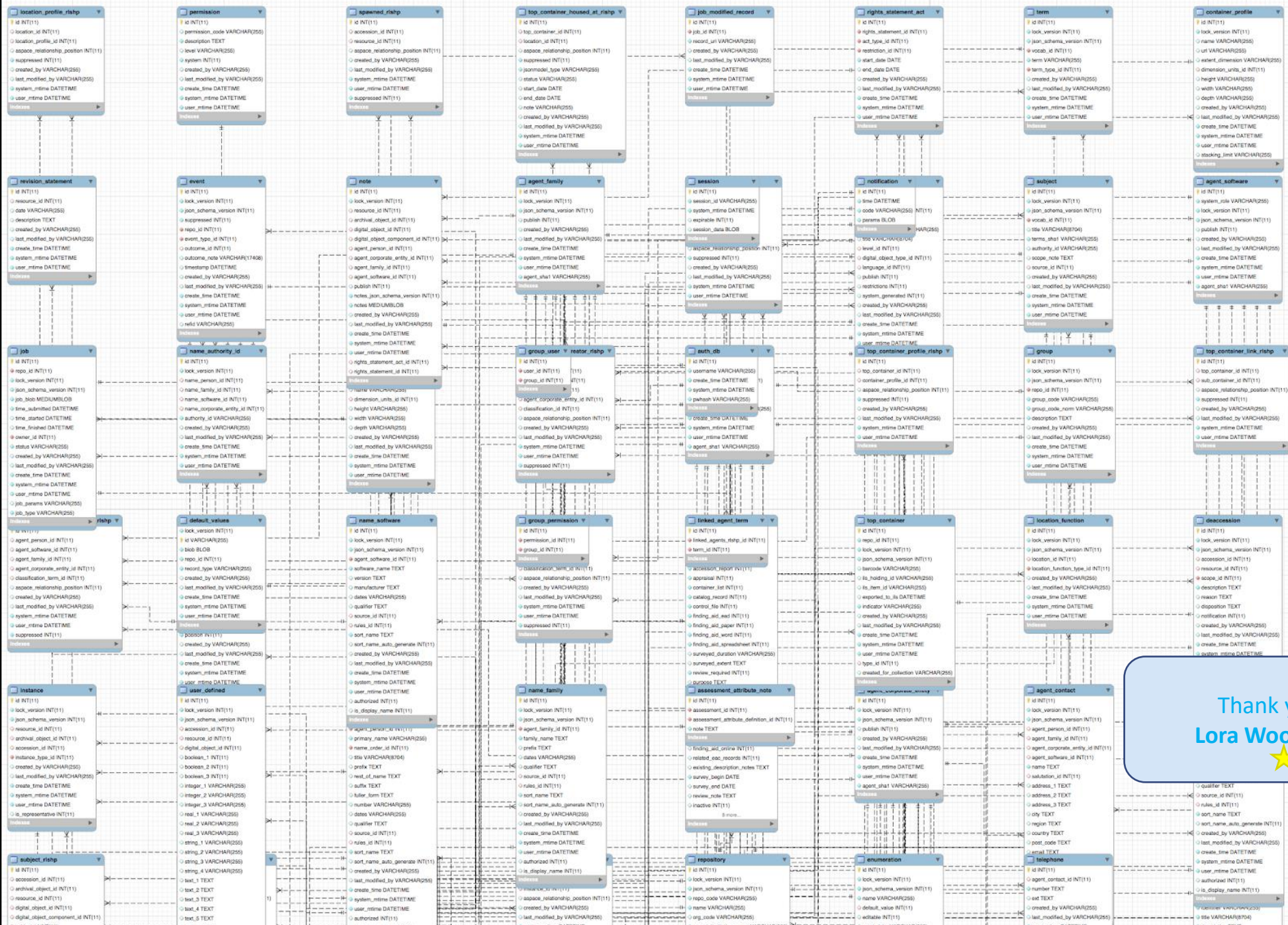
15 digital objects

3 top containers

Typed/printed  
Bound  
On a shelf

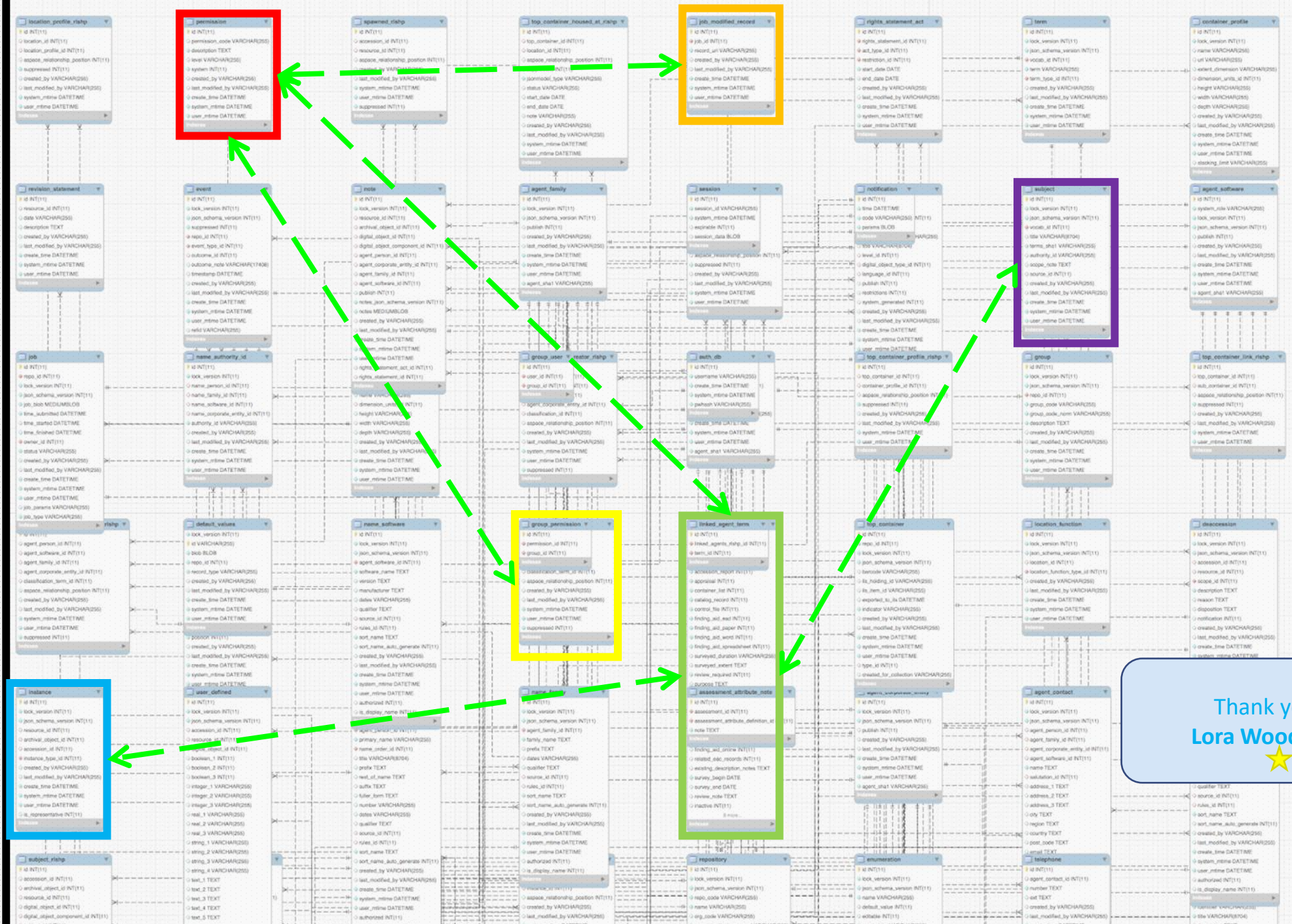
Encoded  
Rendered as PDF or HTML  
On the web

Atomized and stored in tables in a SQL  
database  
Links between records maintain their  
context  
Display and export options are limitless



Thank you,  
Lora Woodford!





Thank you,  
Lora Woodford!



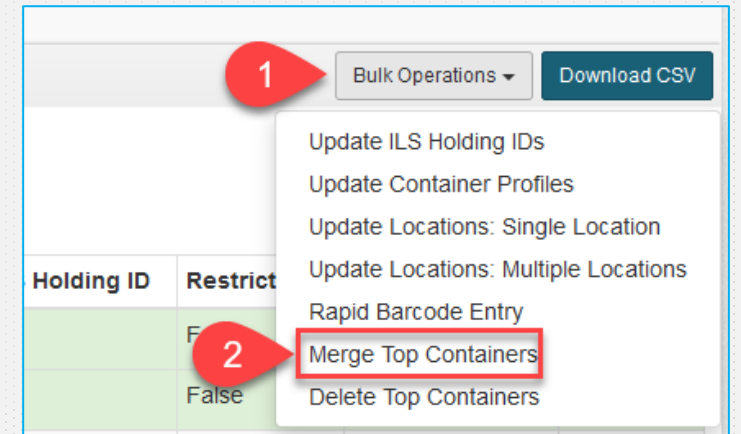
Pro-tips!

# Overview of Recent Features

## Merging top containers

- Just making sure that you know that you can merge top containers starting in 2.7.1
- This was a feature request dating back to 2016!
- All the instances of the containers being merged will be preserved

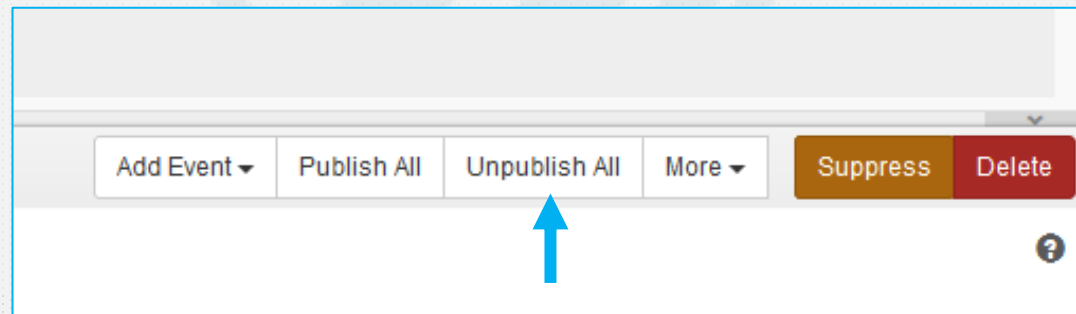
1. Select repository
2. Gear menu
3. Manage Top Containers
4. Search for containers
5. Select containers





### Unpublish All and options at every level

- Just making sure that you know that you can Unpublish All starting in v3.0.1
  - And more, you can now either Publish or Unpublish **at all levels** of the tree (hierarchy)
  - Let that sink in, because that might be a game changer for you
  - This was a popular plugin developed by the University of Cambridge



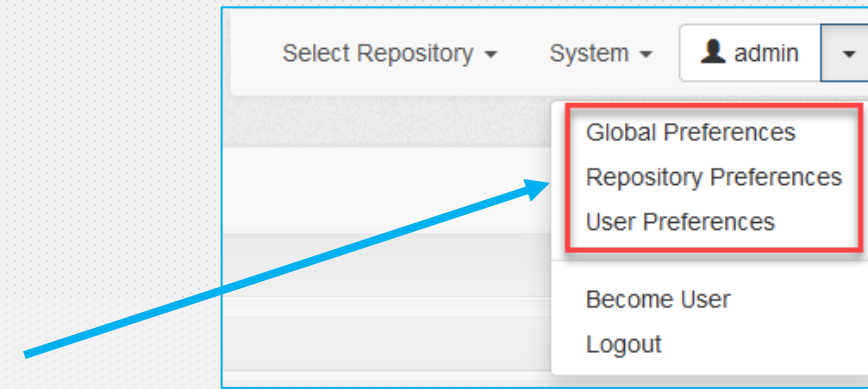
★ Thank you,  
Nick Butler!



## Recent Features

### Prompt: Embrace column display settings

- Starting in 2.8.0 and especially in 2.8.1, you are given A LOT of column settings in the staff interface
- A LOT
- You can now add columns and set default views and sorting for almost every Browse view on the staff side
- **Do not pass these by.** I promise you one less migraine this year\* if you go check these out



\* I promise nothing.

# User Preferences -- Pro-Tips

## General Settings

Show  
Suppressed?

Publish?

Pre-  
populate  
Records?

Language  
Selection

## Note Order

≡ Bibliography

≡ Abstract

≡ Materials Specific Details

≡ Physical Description

≡ Physical Facet

## Note Order

Search and Browse Column  
Preferences

Accession Browse Columns

Agent Browse Columns

Archival Object Browse Columns

Assessment Browse Columns

Background Jobs Columns

Classification Browse Columns

Collection Management Browse  
Columns

Container Profile Browse Columns

Digital Object Browse Columns

Digital Object Component Browse  
Columns

Event Browse Columns

Location Browse Columns

Location Profile Browse Columns

Repository Browse Columns

Resource Browse Columns

Search Columns

Subject Browse Columns

Top Container Browse Columns

Edit Default Values

Download CSV

Create Accession

Delete

## Accessions

Showing 1 - 10 of 18 Results, Sort by: Title Ascending and: Select

<input type="checkbox"/>	Title	Identifier	Accession Date	Extent	
<input type="checkbox"/>	Accession 01	mss-acc-1	1999-01-03		<a href="#">View</a> <a href="#">Edit</a>
<input type="checkbox"/>	Accession 02	mss-acc-2	1999-01-03		<a href="#">View</a> <a href="#">Edit</a>
<input type="checkbox"/>	Accession 03	mss-acc-3	1999-01-04		<a href="#">View</a> <a href="#">Edit</a>
<input type="checkbox"/>	Accession 04	mss-acc-4	1999-01-05		<a href="#">View</a> <a href="#">Edit</a>
<input type="checkbox"/>	Accession 05	mss-acc-5	1999-01-06		<a href="#">View</a> <a href="#">Edit</a>

### Prompt: Useful hack for the DO spreadsheet in the NEW container spreadsheet!

- Starting in 3.0+ there is a *new* spreadsheet that allows you to add top containers to pre-existing archival objects
  - That new feature might get lost amidst all the changes in the Agents module
- This presents an unintended but very useful hack for those of you who use the DO import spreadsheet

# Recent Features

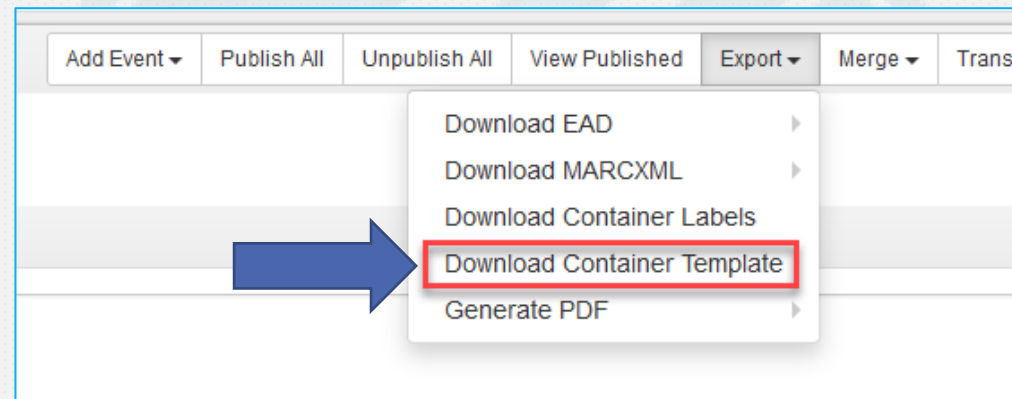
- I think the biggest challenge in using the DO spreadsheet is providing the archival object information

Resource Identifying Information	Resource Identifying Information	Archival Object Basic Information	Archival Object Basic Information
EAD ID	Resource URI REQUIRED IF NO EAD ID	Ref_id REQUIRED IF NO URI	Archival Object URI REQUIRED IF NO REF ID
ead	res_uri	ao_ref_id	ao_uri
<b>EAD ID</b>	<b>Resource URI</b>	<b>REF ID</b>	<b>Arch. Obj. URI</b>
	/repositories/2/resources/1	Oh geeze!	
	/repositories/2/resources/1		How can I add these in bulk?
	/repositories/2/resources/1		
	/repositories/2/resources/1		

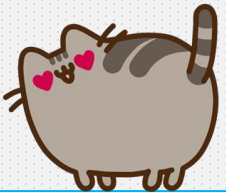
- (Does the digitization work order plugin help here?)

## Recent Features

- Though not what it was intended for, if you download the new Container Template you will get the info you need to link AOs and DOs
- Note that you do not get this template from an external source
  - ASpace generates this template for you from within a Resource record



# Recent Features



Archival Object archival_object_id	Archival Object ref_id	Archival Object component_id	Archival Object archival_object_title	Resource resource_title
Archival Object ID	Ref ID	Component ID		Resource Title
108	c45ecc62ae8b069f20659c02db19a3f0			Morris Canal Company records
109	2460b510a7fd2d74c23e2ba59ccb9863			Morris Canal Company records
110	a3a1ce453ade5c5c3b15f010d151d192			Morris Canal Company records
111	d00463ac5a1f6940680fa3e750531ff5			Morris Canal Company records
112	32c576ddf8333e4404317be34e95cdf5			Morris Canal Company records
113	3786359fca69e53ea9ba2441d9d5cce7			Morris Canal Company records
114	f4d36fbecf56d1861c5f190d99692749			Morris Canal Company records
115	ffb57e6926d88481ec118a2e823c717f		Photo album: Canal boats	Morris Canal Company records
116	9d7e6b797c7b631b86bfc5e735e0af0d		Photo album: Inclined planes	Morris Canal Company records
117	7a2c5da74d36559ab46cc6eed91c510a		Photo album: Locks and lock tenders	Morris Canal Company records
118	64fbe63ee56591f49fcadcfcdffb2f1		Series 2: Business Correspondence	Morris Canal Company records
119	f31a6b9d07269b577fad51e9d0e999e2		Letter-press copybook (outbound)	Morris Canal Company records
120	2d980f55298fd8064f19737957f81379		Letter-press copybook (outbound)	Morris Canal Company records
121	519c283f49571ebc2e2dda2b0fd82c5b		Letter-press copybook (outbound)	Morris Canal Company records
122	78de486ec3800fcc4f3ca4d632303f73		Letter-press copybook (outbound)	Morris Canal Company records
123	a7653fa234b12028a9c3657adcc1cd77		Letter-press copybook (outbound)	Morris Canal Company records
124	ff597fdb86e97e35217ee05e2b8f1edc		Letter-press copybook (outbound)	Morris Canal Company records
125	f7244f592e73dc8313c6338c4761c1c2		Letter-press copybook (outbound)	Morris Canal Company records
126	8aba75c44436118ad32a4a9feb05d5d5		Letter-press copybook (outbound)	Morris Canal Company records
127	c33871f1eae726d71a8cf24997fe74ed		Letter-press copybook (outbound)	Morris Canal Company records
128	d82cab4d8326cfbc0281d16560bb3441		Letter-press copybook (outbound)	Morris Canal Company records

Paste these into the DO spreadsheet and you're ready to roll

And you even have the unittitles for gut-checks on which AOs you're linking to

Pro-tips!

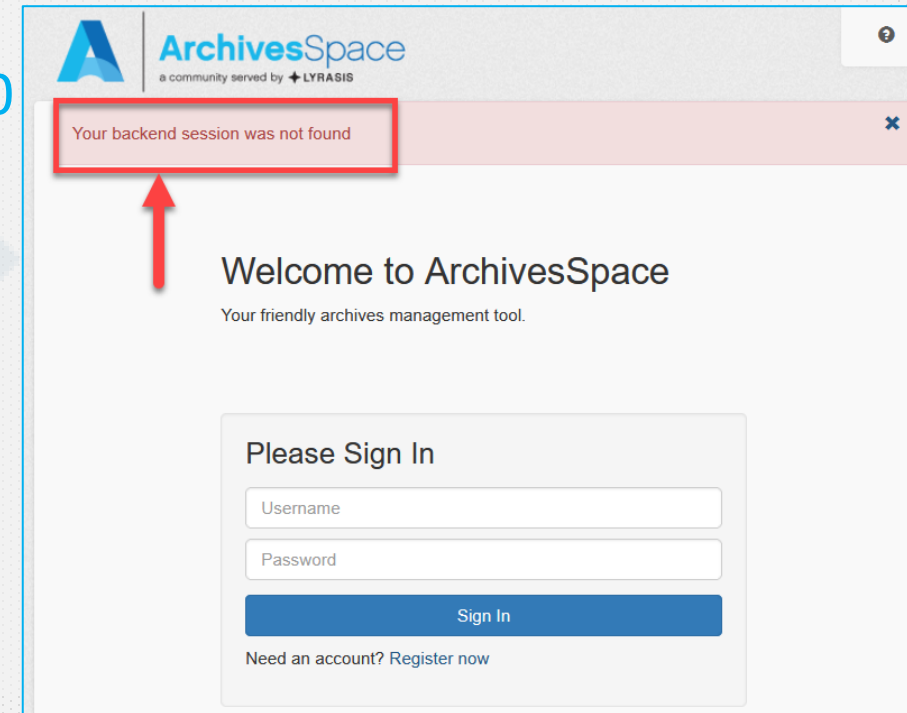
# Know Thy Config



- I'm about to give you tips on ASpace configurations, so my first tip is...
- I did two webinars on just the config:
  - **Know Thy Config: Introduction**
    - What is the config, where do you find it, I demonstrate simple changes
  - **Know Thy Config: Inheritance**
    - Deep dive into inheritance and how to tweak it in the config
    - Comes with downloadable sample code on the webinar page
- Google “atlas systems training webinar config”
- Or <https://training.atlas-sys.com/Course/Details/4336>

## FYI: You can increase the time before ASpace automatically logs you out

- This is called session time
- It's managed in seconds
- `AppConfig[:session_expire_after_seconds] = 3600`

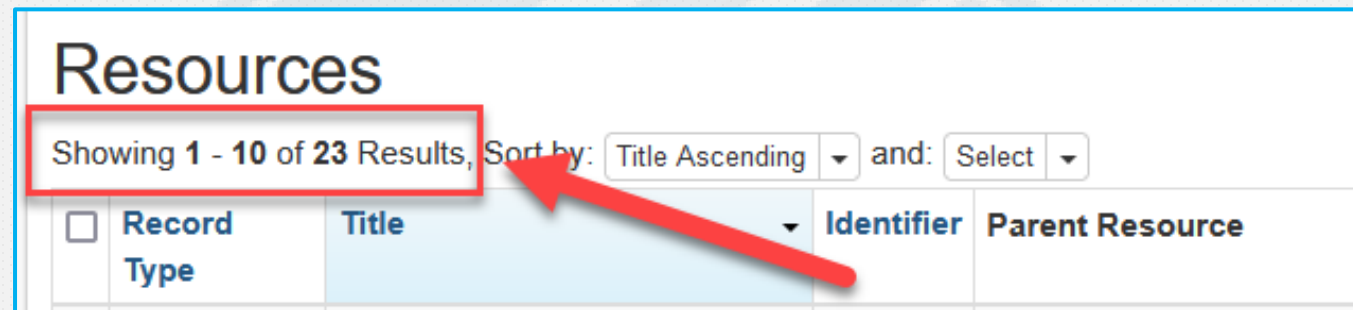


Shout out to **Corey Schmidt!** ★



# Know Thy Config

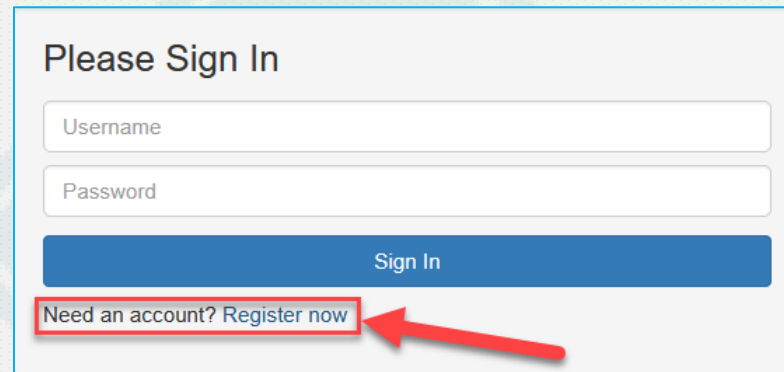
- **FYI:** You can increase page and results size in both the SUI and PUI
  - ☞ `AppConfig[:pui_search_results_page_size] = 10`
  - ☞ `AppConfig[:default_page_size] = 10`



The screenshot shows a search results page titled "Resources". A red box highlights the text "Showing 1 - 10 of 23 Results, Sort by: Title Ascending" and a red arrow points to the "Sort by" dropdown menu. The page also features a table with columns for "Record Type", "Title", "Identifier", and "Parent Resource".

<input type="checkbox"/>	Record Type	Title	Identifier	Parent Resource
--------------------------	-------------	-------	------------	-----------------

- FYI: You can remove the Register Now link, to prevent spam



The image shows a 'Please Sign In' form with the following elements:

- Title: Please Sign In
- Input field: Username
- Input field: Password
- Button: Sign In
- Text: Need an account? Register now (highlighted with a red box and a red arrow pointing to it)

-  `AppConfig[:allow_user_registration] = false`

- FYI: You can change the barcode length (globally or per repo)

Box 2 Top Container

Container Profile

Container Type

Indicator \*

Barcode

Barcode length for this repository: 0-255 characters

ILS Holding ID

-  `AppConfig[:container_management_barcode_length] = {:system_default => {:min => 0, :max => 255}}`

- **FYI:** You can configure EAD exports if you export it via OAI-PMH
  - There's already *two* places for OAI-PMH settings:

# Know Thy Config

## 1. In the Repository record

### OAI Harvest Settings

These options affect OAI-PMH for this repository only. Click below to view/edit global OAI options. This will leave current form without saving changes.

[View/Edit Global OAI Settings](#)

---

OAI Harvesting Disabled?

Sets included in OAI  class

## 2. In OAI-PMH Settings

### OAI-PMH Settings

#### General Settings

OAI Record Prefix

OAI Admin Email

OAI Repository Name

[Update OAI-PMH Settings](#)

---


#### Repository Set

In addition to sets based on level of description, you can define an OAI Set based on repositories.

Repository Set

But *this* setting is in the config:

```
AppConfig[:oai_ead_options] = { :include_daos => true, :use_numbered_c_tags => true }
```

- **FYI:** You can modify the behavior of the extent calculator
  - You can set calculations to be linear/by volume
  - You can set the unit of measure (feet, inches, meters)
  - You can set the number of decimal points
-  `AppConfig[:container_management_extent_calculator] = { :report_volume => true, :unit => :feet, :decimal_places => 3 }`
- Here are some examples using the same exact container profiles (five record cartons) for each calculation:



In this example I changed the unit of measure from inches to feet

Extent Calculation

Morris Canal Company records **Resource**

Calculated Extent Report

Container Profile	Count	Extent
Record center carton [15d, 10h, 12w inches] extent measured by width	5	60.0
All Containers	5	60.0 linear inches

Morris Canal Company records **Resource**

Calculated Extent Report

Container Profile	Count	Extent
Record center carton [15d, 10h, 12w inches] extent measured by width	5	5.0
All Containers	5	5.0 linear feet

In this example I changed the type of measure from **linear** to **volume**

Morris Canal Company records **Resource**  
Calculated Extent Report

Container Profile	Count	Extent
Record center carton [15d, 10h, 12w inches] extent measured by width	5	5.0
All Containers	5	<b>5.0 linear feet</b>

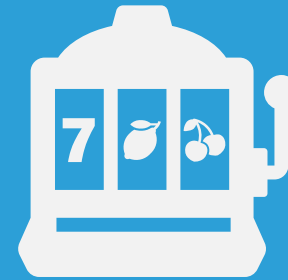
Extent Calculation

Morris Canal Company records **Resource**  
Calculated Extent Report

Container Profile	Count	Extent
Record center carton	5	5.21
All Containers	5	<b>5.21 cubic feet</b>

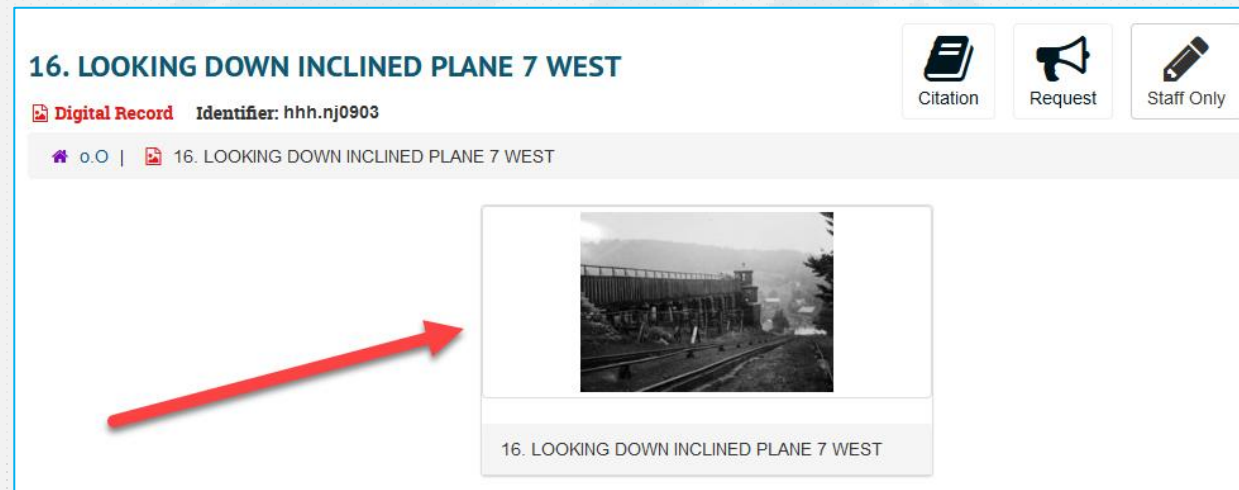
Pro-tips!

# Random tips!



## FYI: You can add thumbnails to digital objects

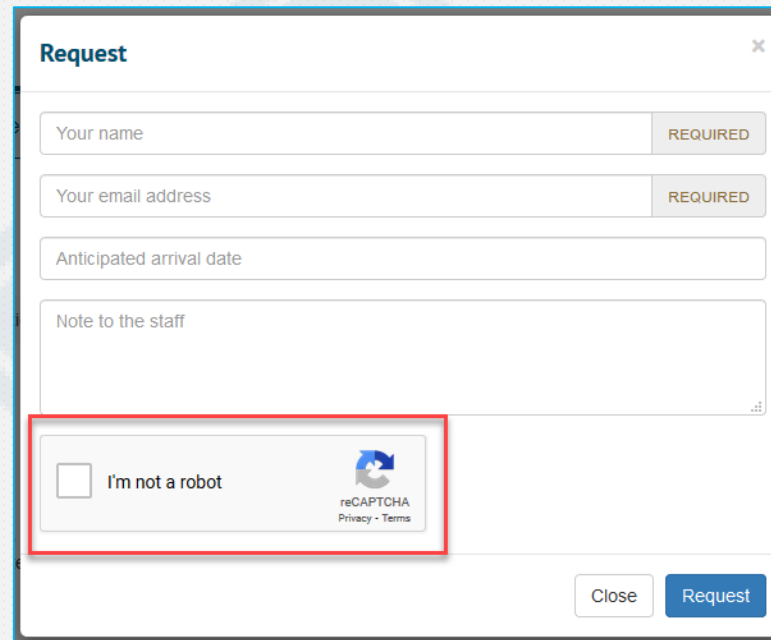
- Fantastic resource on how to do this at the 2020-4-19 ArchivesSpace Trainers Corps “Office Hour”
- The DO import spreadsheet supports this



Thank you, ★  
Noah Huffman and  
★ Mark Custer!



- FYI: You can install the [reCAPTCHA plugin](#) to prevent spam via the PUI request form



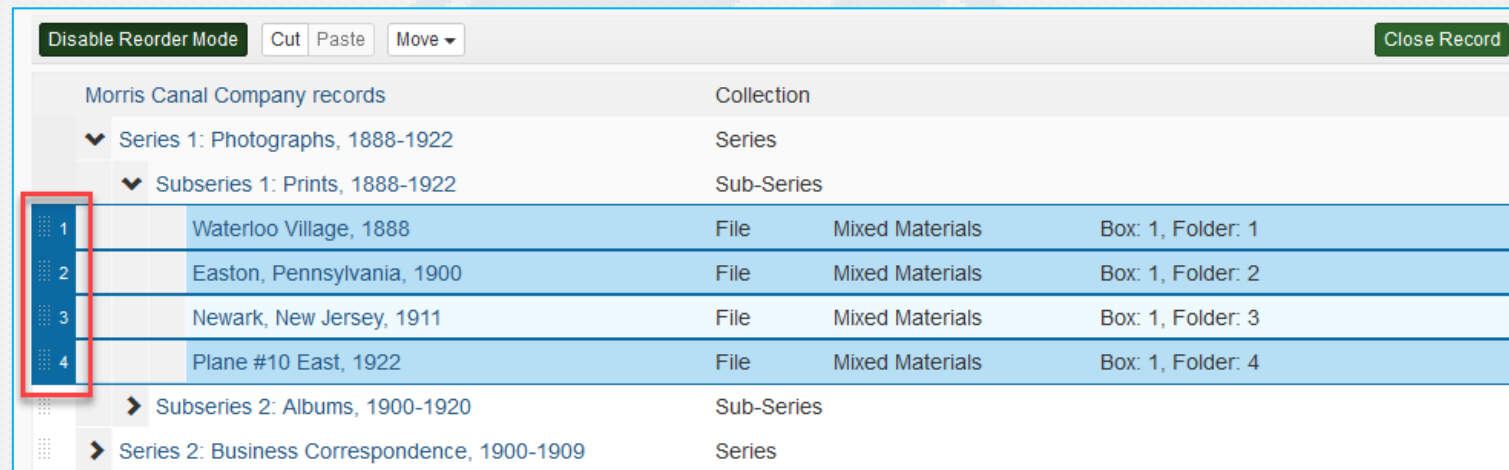
The image shows a 'Request' form with the following fields: 'Your name' (REQUIRED), 'Your email address' (REQUIRED), 'Anticipated arrival date', and 'Note to the staff'. At the bottom, there is a reCAPTCHA checkbox labeled 'I'm not a robot' which is highlighted with a red box. To the right of the checkbox is the reCAPTCHA logo and the text 'reCAPTCHA Privacy - Terms'. At the bottom right of the form are 'Close' and 'Request' buttons.

- <https://github.com/archivesspace-plugins/aspace-recaptcha>

## FYI: Some tips when using re-order mode!

- Did you know you can hold down **shift** to select multiple AOs at once?
  - On Windows in Firefox on a Dell keyboard

**Shift + Click**



Morris Canal Company records		Collection
▼ Series 1: Photographs, 1888-1922		Series
▼ Subseries 1: Prints, 1888-1922		Sub-Series
1	Waterloo Village, 1888	File Mixed Materials Box: 1, Folder: 1
2	Easton, Pennsylvania, 1900	File Mixed Materials Box: 1, Folder: 2
3	Newark, New Jersey, 1911	File Mixed Materials Box: 1, Folder: 3
4	Plane #10 East, 1922	File Mixed Materials Box: 1, Folder: 4
▶ Subseries 2: Albums, 1900-1920		Sub-Series
▶ Series 2: Business Correspondence, 1900-1909		Series

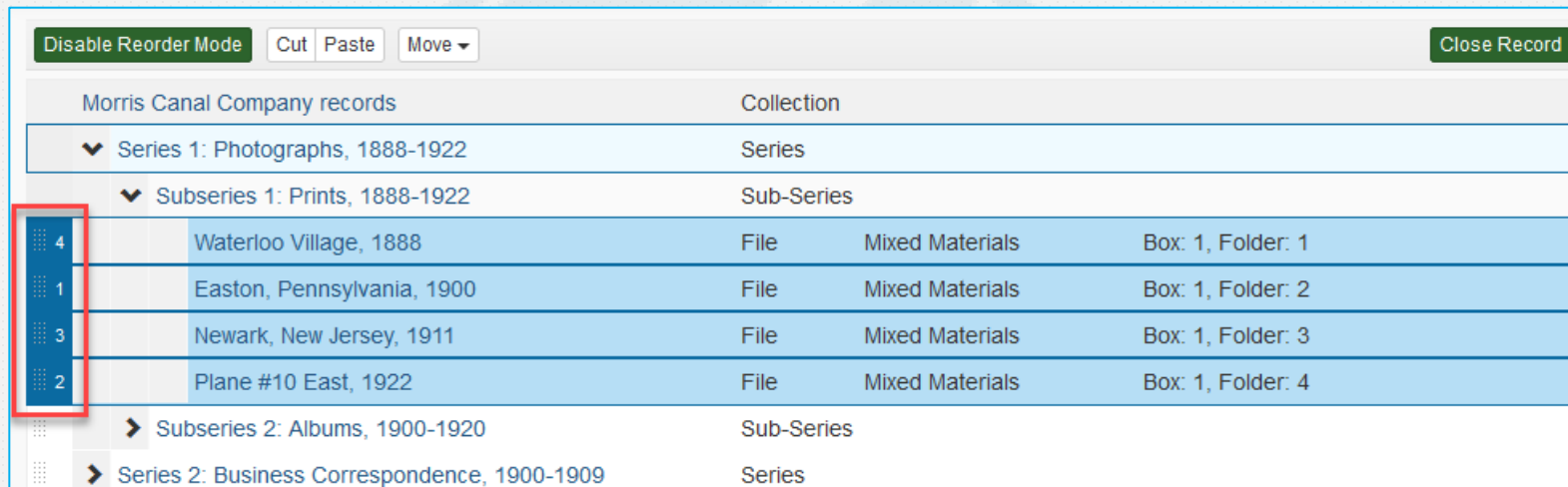
Thank you,  
Mark Custer?



## FYI: Some tips when using re-order mode!

- Did you know you can hold down **ctrl** to select in a new order?
  - On Windows in Firefox on a Dell keyboard

**Ctrl + Click**



Morris Canal Company records		Collection
▼	Series 1: Photographs, 1888-1922	Series
▼	Subseries 1: Prints, 1888-1922	Sub-Series
4	Waterloo Village, 1888	File Mixed Materials Box: 1, Folder: 1
1	Easton, Pennsylvania, 1900	File Mixed Materials Box: 1, Folder: 2
3	Newark, New Jersey, 1911	File Mixed Materials Box: 1, Folder: 3
2	Plane #10 East, 1922	File Mixed Materials Box: 1, Folder: 4
>	Subseries 2: Albums, 1900-1920	Sub-Series
>	Series 2: Business Correspondence, 1900-1909	Series

Thank you,  
Mark Custer?  
★



# FYI: Some tips when using re-order mode!


- Need to delete a whole bunch of stuff?
- Move everything into a single series and then delete

Fake collection				Collection
Series 1: Photographs, 1888-1922				Series
Subseries 1: Prints, 1888-1922				Sub-Series
Waterloo Village, 1888	File	Mixed Materials	Box: 1, Folder: 1	
Easton, Pennsylvania, 1900	File	Mixed Materials	Box: 1, Folder: 2	
Newark, New Jersey, 1911	File	Mixed Materials	Box: 1, Folder: 3	
Plane #10 East, 1922	File	Mixed Materials	Box: 1, Folder: 4	
Subseries 2: Albums, 1900-1920				Sub-Series
Photo album: Canal boats, 1900-1920	File	Mixed Materials	Box: 2	
Photo album: Inclined planes, 1900-1920	File	Mixed Materials	Box: 3	
Photo album: Locks and lock tenders, 1900-1920	File	Mixed Materials	Box: 4	

Fake collection				Collection
Series 1: Photographs, 1888-1922				Series
Subseries 1: Prints, 1888-1922				Sub-Series
Subseries 2: Albums, 1900-1920				Sub-Series
Waterloo Village, 1888	File	Mixed Materials	Box: 1, Folder: 1	
Easton, Pennsylvania, 1900	File	Mixed Materials	Box: 1, Folder: 2	
Newark, New Jersey, 1911	File	Mixed Materials	Box: 1, Folder: 3	
Plane #10 East, 1922	File	Mixed Materials	Box: 1, Folder: 4	
Photo album: Canal boats, 1900-1920	File	Mixed Materials	Box: 2	
Photo album: Inclined planes, 1900-1920	File	Mixed Materials	Box: 3	
Photo album: Locks and lock tenders, 1900-1920	File	Mixed Materials	Box: 4	



- **Prompt:** Have you ever noticed that certain records display as blue in View mode on the staff interface?


Agent Links		
Role	Relator	Agent
Creator		 Morris Canal Banking Company



Mixed Materials Box 1


Type Mixed Materials

Is Representative? False

Top Container  Box 1

Child Type Folder

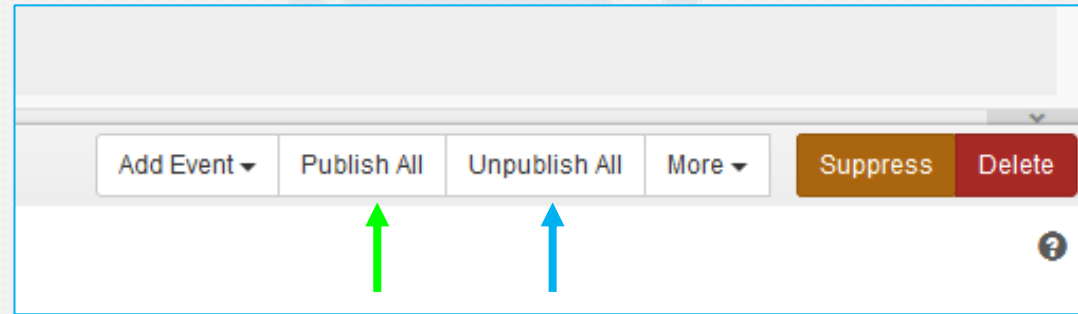
Child Indicator 1

Locations  Cold storage [Range: 1]

Thank you,  
Noah Huffman?



- **FYI:** Publish All doesn't publish digital objects associated with the record
- Likewise, Unpublish All doesn't unpublish them either

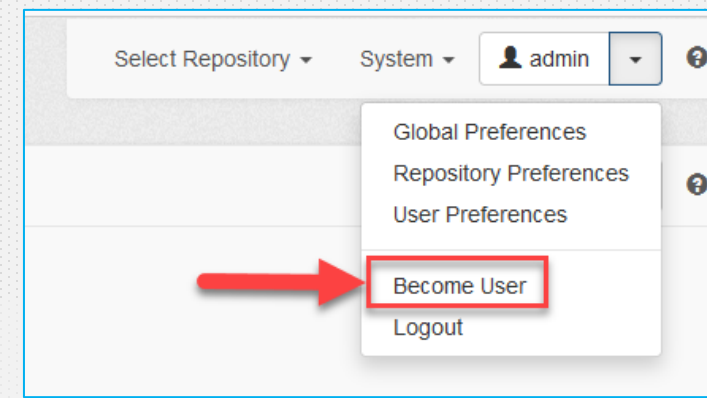


“Performing this action will publish this record, any sub-records (External Documents, Notes, etc) and all components below this record in the hierarchy.”

Thank you, ★  
Corey Schmidt!



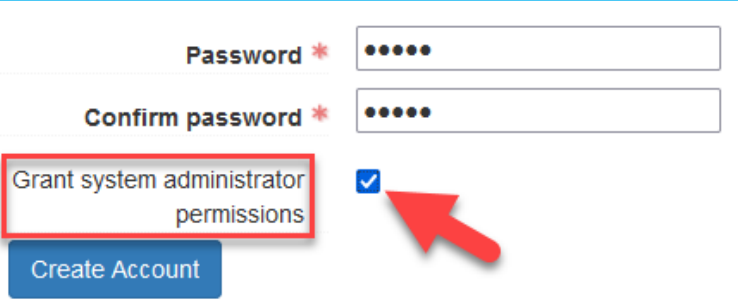
- **Prompt:** Have you checked your permission groups lately?
  - I am assuming permission groups are something you set up awhile ago and rarely, if ever, return to
  - Your permissions affect your view of ASpace
  - Staff may not realize they are missing functionality that they want/need
  - It has been rare to date, but new versions of AS might add permissions
    - Note the following **new** permissions as of 3.0.1:
      - view contact details for agent records
      - work with agents in full mode



- **FYI: Speaking of users**

- Did you know that permissions affect what you can see in the staff side?
  - Buttons, menu options
- This is probably old news to a lot of you
- But if it's not, it can blow your mind
- I suspect that in the universe at large, this leads to subtle misunderstandings and confusion
  - “You want me to click *what?*”
- sysadmins can **Become a User**, allowing them to see what users can and cannot click

- FYI: Admin versus system administrators
- “**The Admin**” is the most powerful account in AS
  - The username literally spelled a-d-m-i-n
  - Defaults to full permissions
- But **System Administrators** are everyday AS accounts granted additional privileges
- The only difference I am aware of (on the staff side) is that The Admin has access to the **System Information** view (coming up next)
  - The Admin has other privileges through the API, such as access to system endpoints



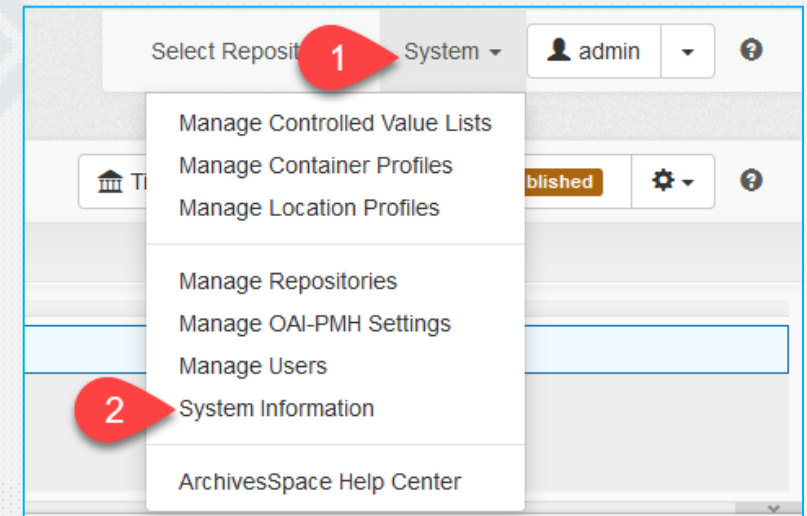
Form fields and options:

- Password \*
- Confirm password \*
- Grant system administrator permissions
- Create Account

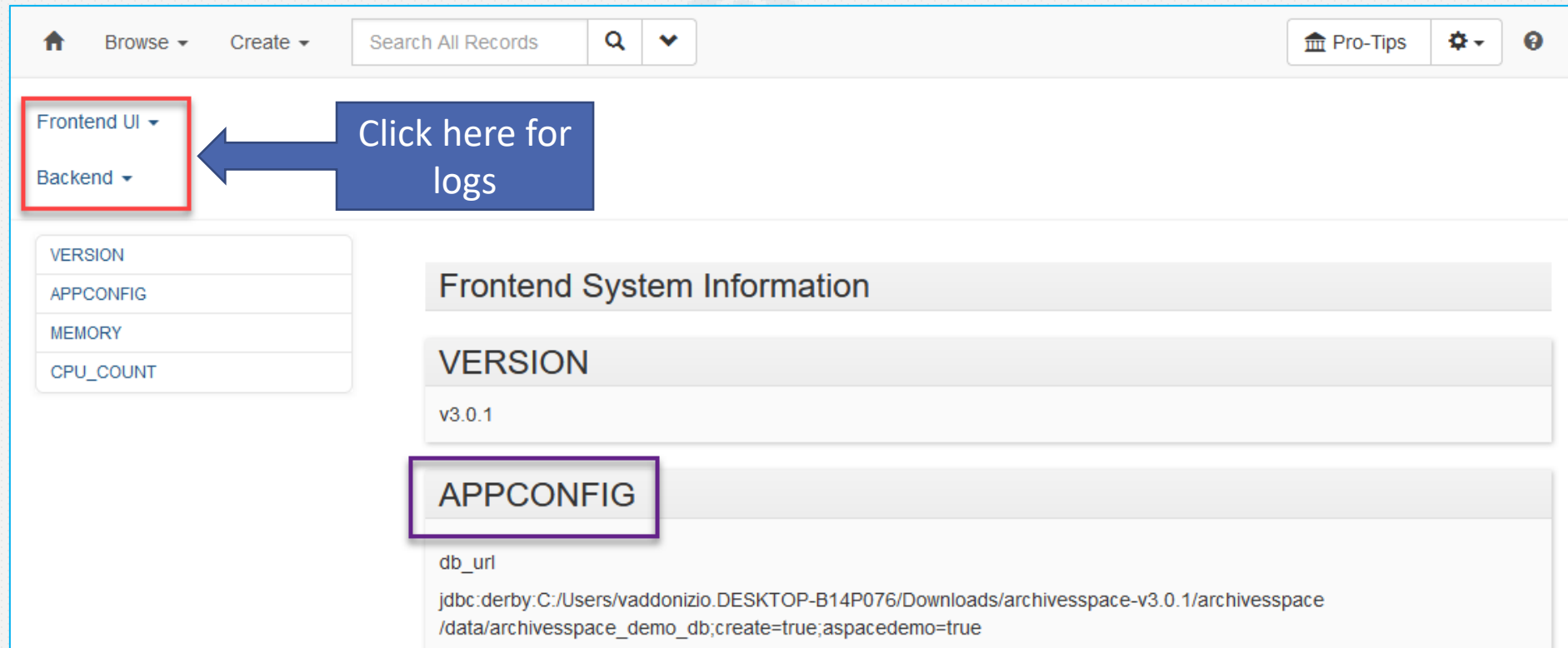
★ Thank you,  
Anne Marie  
Lyons!



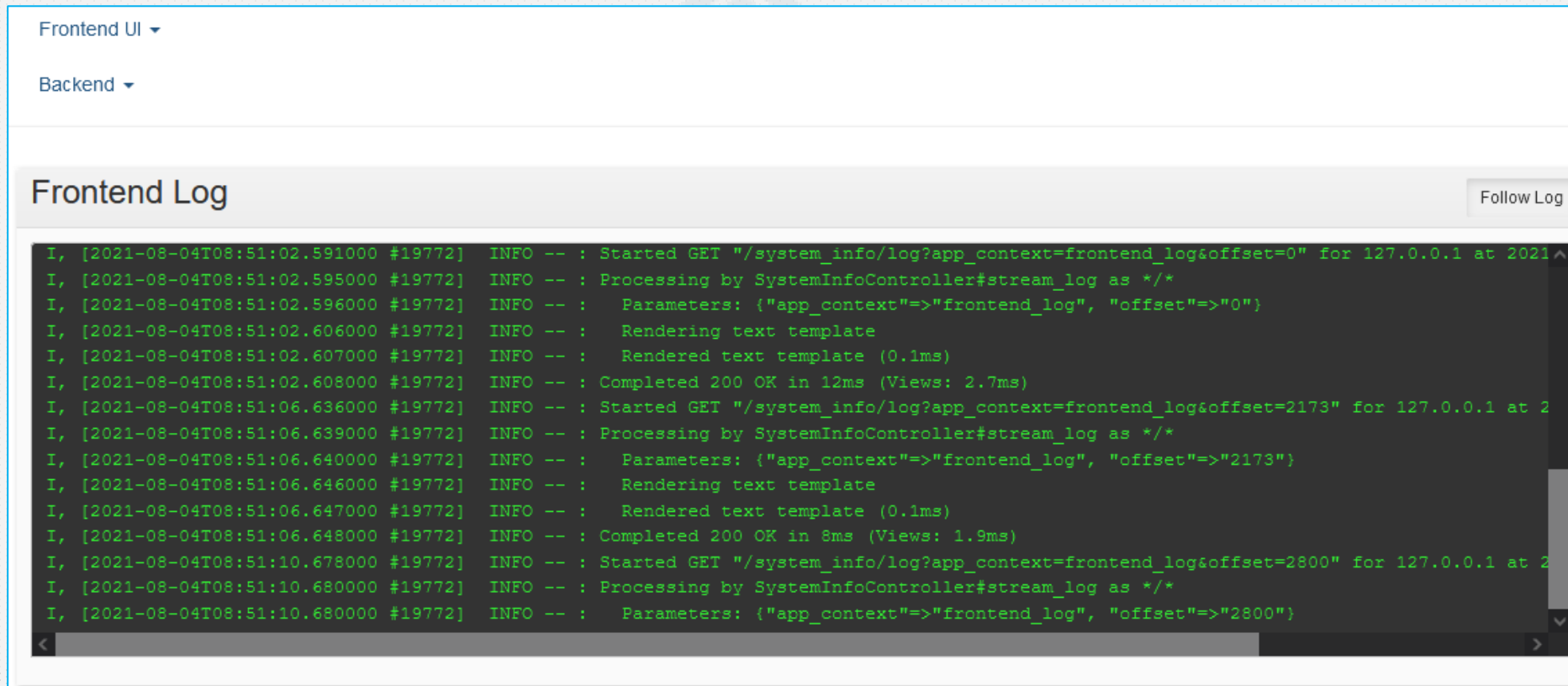
- **FYI:** The admin account can see system logs in real time in the SUI
  - Only “The Admin”<sup>👑</sup>
  - Your database administrator or hosting provider is probably the person/people with that password
  - But anyone can try this out in the [AS Sandbox!](#)



- FYI: The admin account can see system logs in real time in the SUI



- FYI: The admin account can see system logs in real time in the SUI




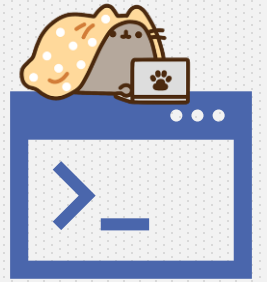
The screenshot displays the SUI interface with a 'Frontend Log' section. At the top, there are dropdown menus for 'Frontend UI' and 'Backend'. The log area has a 'Follow Log' button. The log content is as follows:

```
I, [2021-08-04T08:51:02.591000 #19772] INFO -- : Started GET "/system_info/log?app_context=frontend_log&offset=0" for 127.0.0.1 at 2021-08-04T08:51:02.591000 #19772
I, [2021-08-04T08:51:02.595000 #19772] INFO -- : Processing by SystemInfoController#stream_log as */*
I, [2021-08-04T08:51:02.596000 #19772] INFO -- : Parameters: {"app_context"=>"frontend_log", "offset"=>"0"}
I, [2021-08-04T08:51:02.606000 #19772] INFO -- : Rendering text template
I, [2021-08-04T08:51:02.607000 #19772] INFO -- : Rendered text template (0.1ms)
I, [2021-08-04T08:51:02.608000 #19772] INFO -- : Completed 200 OK in 12ms (Views: 2.7ms)
I, [2021-08-04T08:51:06.636000 #19772] INFO -- : Started GET "/system_info/log?app_context=frontend_log&offset=2173" for 127.0.0.1 at 2021-08-04T08:51:06.636000 #19772
I, [2021-08-04T08:51:06.639000 #19772] INFO -- : Processing by SystemInfoController#stream_log as */*
I, [2021-08-04T08:51:06.640000 #19772] INFO -- : Parameters: {"app_context"=>"frontend_log", "offset"=>"2173"}
I, [2021-08-04T08:51:06.646000 #19772] INFO -- : Rendering text template
I, [2021-08-04T08:51:06.647000 #19772] INFO -- : Rendered text template (0.1ms)
I, [2021-08-04T08:51:06.648000 #19772] INFO -- : Completed 200 OK in 8ms (Views: 1.9ms)
I, [2021-08-04T08:51:10.678000 #19772] INFO -- : Started GET "/system_info/log?app_context=frontend_log&offset=2800" for 127.0.0.1 at 2021-08-04T08:51:10.678000 #19772
I, [2021-08-04T08:51:10.680000 #19772] INFO -- : Processing by SystemInfoController#stream_log as */*
I, [2021-08-04T08:51:10.680000 #19772] INFO -- : Parameters: {"app_context"=>"frontend_log", "offset"=>"2800"}
```



- **Suggestion:** Create a user group for old accounts
  - What do you do when people/students leave your organization?
  - Consider a user group with zero permissions and move old staff accounts there
  - Remember to also remove them from whatever group(s) they started in

Groups	
Group code	
Former Staff of the Test repository (former-staff)	 Zero permissions
Advanced Data Entry users of the Test repository (repository-advanced-data-entry)	Edit
Archivists of the Test repository (repository-archivists)	Edit
Basic Data Entry users of the Test repository (repository-basic-data-entry)	Edit
Managers of the Test repository (repository-managers)	Edit
Project managers of the Test repository (repository-project-managers)	Edit
Viewers of the Test repository (repository-viewers)	Edit



- **Suggestion:** For API users, create a special staff account or user group just for the API
  - Name it something distinct from your own username, like `api_user_va`
  - Control permissions for that account to prevent API whoopsies
    - You do this in the staff interface like for any other account
    - Set all View permissions with zero Edit permissions

**Suggestion:** The next time you get an error, check the time

- If you need to report an error to IT or your hosting provider, knowing the date and time of the error is a handy fact
- It helps whoever will access the logs, and the more accurate the time, the faster the troubleshooting
- Not all errors log out, so screenshots help, too, especially if it's something you've never seen before

Pro-tips!

# Spreadsheet Importer(s)

★ Bobbi Fox! Dave Mayo!★  
★ Adrienne Pruitt! If I missed you, I'm sorry!



## For new users:


- This section does assume familiarity with the spreadsheet importer
  - Formerly the Harvard aspace-import-excel plugin
    - Formerly the Tuft's Harvard aspace-import-excel plugin
- I hope to do a dedicated webinar one day

### Prompt: Have you refreshed your template lately?

- There are three versions of the archival object spreadsheet in existence:
  1. the original that debuted with the aspace-import-excel plugin (2017) ([here](#)),
  2. an extended version that debuted with plugin version 3.0 (January 2020) ([here](#)),
  3. and the version(s) hosted by ArchivesSpace after 2.8.0 and now maintained by them in core code (May 2020 - now) ([here](#))

- All of them work\*! But which are you using?
- Here's a quick way to tell which you have:
- Does your template have a column called **Resource URI**?
  - You may have to unhide columns to determine that.
    - If yes, you are using one of the most [recent](#) versions hosted by ArchivesSpace.
- If no, does your spreadsheet have a column called **Top Container [indicator](2)**?
  - If yes, you are using the [extended version](#);
  - if no, you are using the [original spreadsheet](#).

\* Not guaranteed in perpetuity or under every circumstance, always test your assumptions.

Sourced from the original user documentation for the plugin(s) 



## What are the differences between AO spreadsheet versions?

- The **extended** version:
  - Allows you to individually set the publish/unpublish flags for **Notes**.
  - Has the ability to add **Agents** as Source and Subject, not just Creator.
  - Expanded the number of **Agents** for each type, including **directions** for adding even more agents.
  - Support for more than one **Extent**, with the ability to **add more extents**.
  - Support for more than one **Container Instance**, with the ability to **add more container instances**.

## And the **2.8+** version:

- Is the extended version +
  - Users can now use either a CSV or an Excel version of the spreadsheets, **found here**
  - Allows you to use *either* **Resource URI** or **EADID** to match to Resources

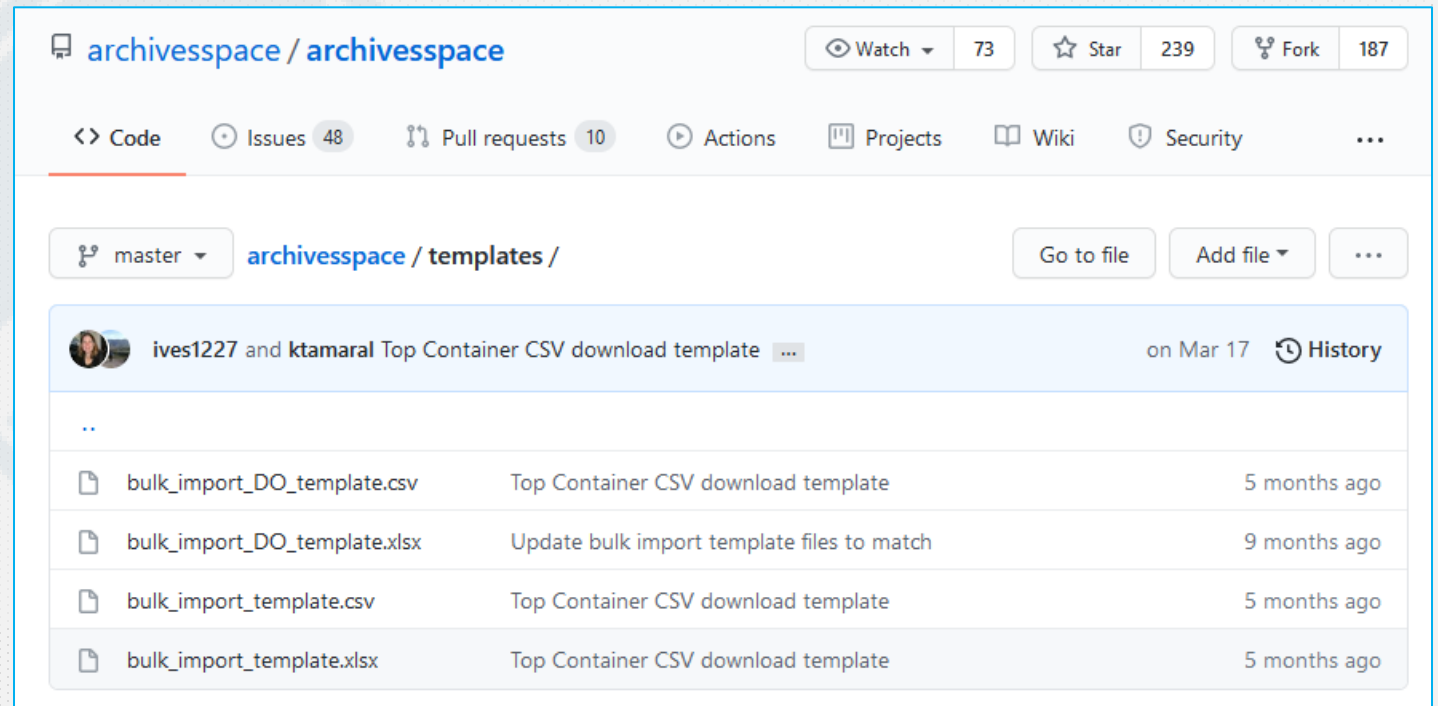


**FYI:** This is a good moment to reinforce a critical point

- It's the code that indicates what the importer is capable of, not the template
- If you use an **old** template with a **new** version of AS, the importer is capable of whatever *that version* of AS is capable of
  - It's just that your old template won't reflect new options
- So, the reason to update the spreadsheet is to stay aware of new functionality
- But that functionality exists whether you're using the most recent template or not

## FYI: How to download these templates off GitHub

- Most recent versions live here:  
<https://github.com/archivesspace/archivesspace/tree/master/templates>
- There are two templates:
  - Bulk\_import\_DO
  - Bulk\_import\_template
- And two versions of each
  - Excel - .xlsx
  - CSV - .csv



archivesspace / archivesspace

Watch 73 Star 239 Fork 187

Code Issues 48 Pull requests 10 Actions Projects Wiki Security

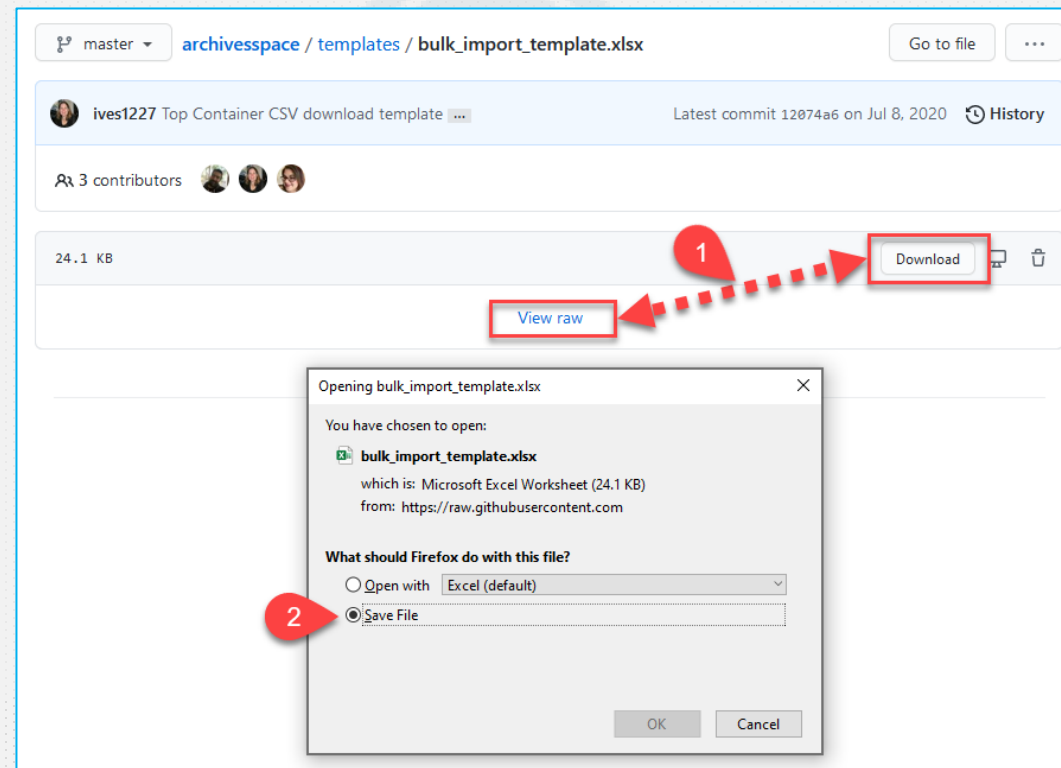
master archivesspace / templates / Go to file Add file

ives1227 and ktamaral Top Container CSV download template on Mar 17 History

..		
bulk_import_DO_template.csv	Top Container CSV download template	5 months ago
bulk_import_DO_template.xlsx	Update bulk import template files to match	9 months ago
bulk_import_template.csv	Top Container CSV download template	5 months ago
bulk_import_template.xlsx	Top Container CSV download template	5 months ago

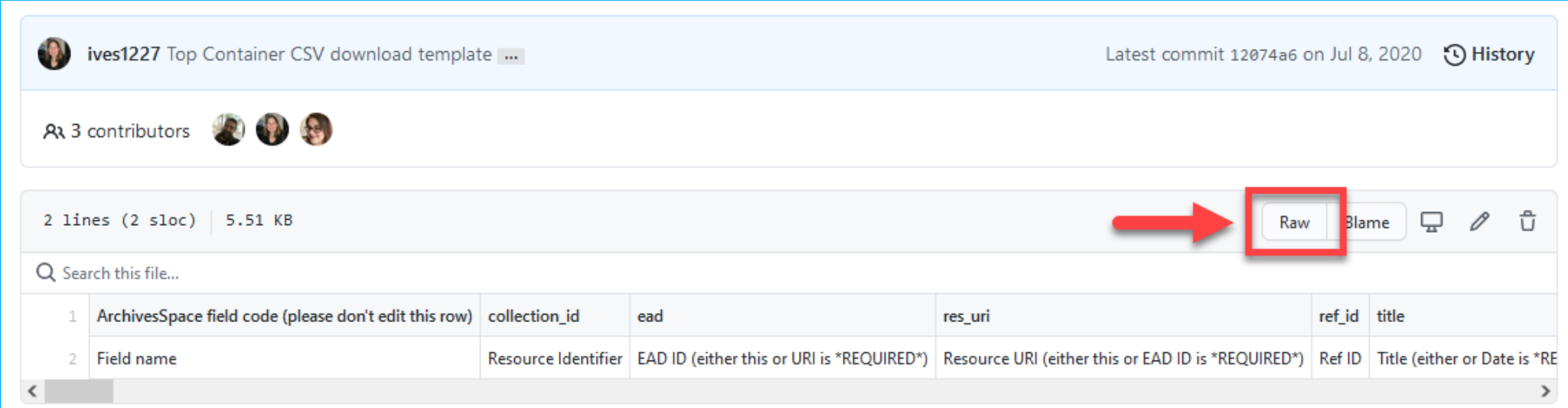
## FYI: How to download these templates off GitHub

- When you click on an **Excel** version, you can just download it



## FYI: How to download these templates off GitHub

- When you click on a CSV version, you have more to do
- But only the first time!
- Once you click on the CSV version, you'll see this:



ives1227 Top Container CSV download template ... Latest commit 12074a6 on Jul 8, 2020 History

3 contributors

2 lines (2 sloc) | 5.51 KB

Raw Blame

Search this file...

1	ArchivesSpace field code (please don't edit this row)	collection_id	ead	res_uri	ref_id	title
2	Field name	Resource Identifier	EAD ID (either this or URI is *REQUIRED*)	Resource URI (either this or EAD ID is *REQUIRED*)	Ref ID	Title (either or Date is *RE

## FYI: How to download these templates off GitHub

```
ArchivesSpace field code (please don't edit this row),collection_id,ead,res_uri,ref_id,title,unit_id,hierarchy,level,other_level,publish,restrictions_flag,processing_note,1_lang,1_langscript,n_langmaterial,p_langmaterial,1_lang,2,1_langscript,2,n_langmaterial,2,p_langmaterial,2,dates_label,begin,end,date_type,expression,date_certainty,dates_label,begin,2,end,2,date_type,2,expression,2,date_certainty,2,portion,number,extent_type,container_summary,physical_details,dimensions,portion_2,number,2,extent_type,2,container_summary,2,physical_details,2,dimensions,2,cont_instance_type,type_1,indicator_1,barcode,type_2,indicator_2,type_3,indicator_3,cont_instance_type,2,type_1,2,indicator_1,2,barcode,2,type_2,2,indicator_2,2,type_3,2,indicator_3,2,digital_object_id,digital_object_title,digital_object_link,thumbnail,people_agent_record_id_1,people_agent_header_1,people_agent_role_1,people_agent_relator_1,people_agent_record_id_2,people_agent_header_2,people_agent_role_2,people_agent_relator_2,people_agent_record_id_3,people_agent_header_3,people_agent_role_3,people_agent_relator_3,people_agent_record_id_4,people_agent_header_4,people_agent_role_4,people_agent_relator_4,people_agent_record_id_5,people_agent_header_5,people_agent_role_5,people_agent_relator_5,families_agent_record_id_1,families_agent_header_1,families_agent_role_1,families_agent_relator_1,families_agent_record_id_2,families_agent_header_2,families_agent_role_2,families_agent_relator_2,corporate_entities_agent_header_1,corporate_entities_agent_role_1,corporate_entities_agent_relator_1,corporate_entities_agent_header_2,corporate_entities_agent_role_2,corporate_entities_agent_relator_2,corporate_entities_agent_header_3,corporate_entities_agent_role_3,corporate_entities_agent_relator_3,subject_1_record_id,subject_1_term,subject_1_type,subject_1_source,subject_2_record_id,subject_2_term,subject_2_type,subject_2_source,n_abstract,p_abstract,n_access_restrict,p_arrangement,p_arrangement,n_bioghist,p_bioghist,n_custodhist,p_custodhist,n_dimensions,p_dimensions,n_odd,p_odd,p_physloc,p_physloc,n_prefercite,p_prefercite,n_separatedmaterial,p_separatedmaterial,n_userrestrict,Field name ,Resource Identifier,EAD ID (either this or URL or Date is *REQUIRED*),Component Unique Identifier,Hierarchy Level,Publish?,Restrictions Apply?,Processing Note,Language (2),Publish?,Date (1) Label,Date (1) Begin,Date (1) end,Date Begin,Date (2) end,Date (2) Type *REQUIRED* if specifying Extent,*REQUIRED* if specifying Extent,"Extent type: cubic feet,Details,Dimensions,Extent portion (2),Extent number (2) *REQUIRED* if specifying second Extent",Container Summary (2),Physical Description [indicator],barcode,Child type,Child indicator,Grandchild type,Grandchild indicator,Container Instance Type [indicator] (2),barcode (2),Child type (2),Child indicator (2),Grandchild type (2),Grandchild indicator (2),Digital Object ID,URL of Linked-out digital object,URL of thumbnail,Agent (1) Record ID,Agent (1) header string,Agent (1) Role,Agent (1) Relator,Agent (2) Record ID,Agent (2) header string,Agent (2) Role,Agent (2) Relator,Agent (3) Record ID,Agent (3) header string,Agent (3) Role,Agent (3) Relator,Agent (4) Record ID,Agent (4) header string,Agent (4) Role,Agent (4) Relator,Agent (5) Record ID,Agent (5) header string,Agent (5) Role,Agent (5) Relator,Family Agent (1) Record ID,Family Agent (1) header string,Family Agent (1) Role,Family Agent (1) Relator,Family Agent (2) Record ID,Family Agent (2) header string,Family Agent (2) Role,Family Agent (2) Relator,Corporate Agent Record ID (1),Corporate Agent header string (1),Corporate Agent Role (1),CorporateRelator (1),Corporate Agent Record ID (2),Corporate Agent header string (2),Corporate Agent Role (2),CorporateRelator (2),Corporate Agent Record ID (3),Corporate Agent header string (3),Corporate Agent Role (3),CorporateRelator (3),Subject (1) Record ID,Subject (1) Term,Subject (1) Type,Subject (1) Source,Subject (2) Record ID,Subject (2) Term,Subject (2) Type,Subject (2) Source,Abstract,Publish Abstract,Access Restrictions,Publish Access Restrictions,Acquisition Information,Publish Acquisition Information?,Arrangement,Publish Arrangement?,Biography/History,Publish Biographical History?,Custodial History,Publish Custodial History?,Dimensions,Publish Dimensions?,General,Publish General?,Physical Description,Publish Physical Description?,Physical Facet,Publish Physical Facet?,Physical Location,Publish Physical Location?,Preferred Citation,Publish Preferred Citation?,Processing Information,Publish Process Info?,Related Materials,Publish Related materials?,Scope and Contents,Publish Scope and contents?,Separated Materials,Publish Separated Materials?,Use Restrictions,Publish Use Restrictions?
```

Right-click or equivalent, Save As .txt or .csv

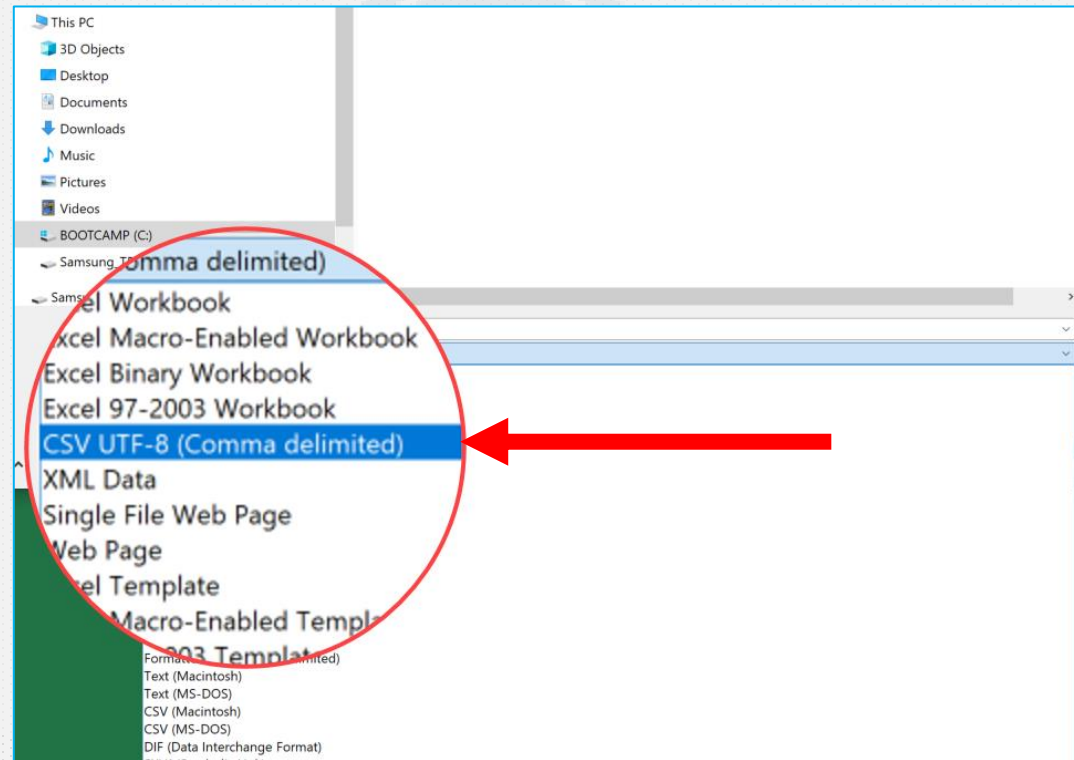


### FYI: The CSV version can help with troubleshooting

- If you're having a lot of spreadsheet ingest problems that aren't solved by the validator, try the CSV version
- If you're having trouble publishing things using the CSV version of the template, try using the **digit 1** instead of the word TRUE
  - 0 = FALSE
- If you have a lot of special characters, and especially if you copy and paste them from somewhere, beware of **character encoding issues**
  - AS accepts **UTF-8** characters

## Spreadsheet importer

- A way to eliminate character encoding issues is to use the CSV version of the spreadsheet and be sure and **Save As UTF-8**



- Speaking of the new templates, what are URIs?
  - **U**niform **R**esource **I**dentifier
- Contrast to U-R-L
  - **U**niform **R**esource **L**ocator

D
Resource Identifying Information
Resource URI REQUIRED IF NO EAD ID
res_uri
<b>Resource URI</b>

Resource Record Title Resource

Basic Information

Title	Resource Record Title
Identifier	MSS 001
Level of Description	Collection
Publish?	False
Restrictions Apply?	False

Languages

> English

Dates

> Creation 1999

**URI: /repositories/2/resources/1**

URL: [http://sandbox.archivespace.org/resources/1/#tree::resource\\_1](http://sandbox.archivespace.org/resources/1/#tree::resource_1)

URI: </repositories/2/resources/1>



## TIP! You can add Notes to the template

- The current template already supports 16 types of notes
- But there are 28 available in the interface
- I have successfully added new ones to the template
  - I am specifically talking about Notes
  - I am taking advantage of existing functionality
  - Not introducing or expecting *new* functionality
- It's very easy

Access Restrictions
Acquisition Information
Arrangement
Biography/History
Custodial History
Dimensions
General
Physical Description
Physical Facet
Physical Location
Preferred Citation
Processing Information
Related Materials
Scope and Contents
Separated Materials
Use Restrictions

## Spreadsheet importer

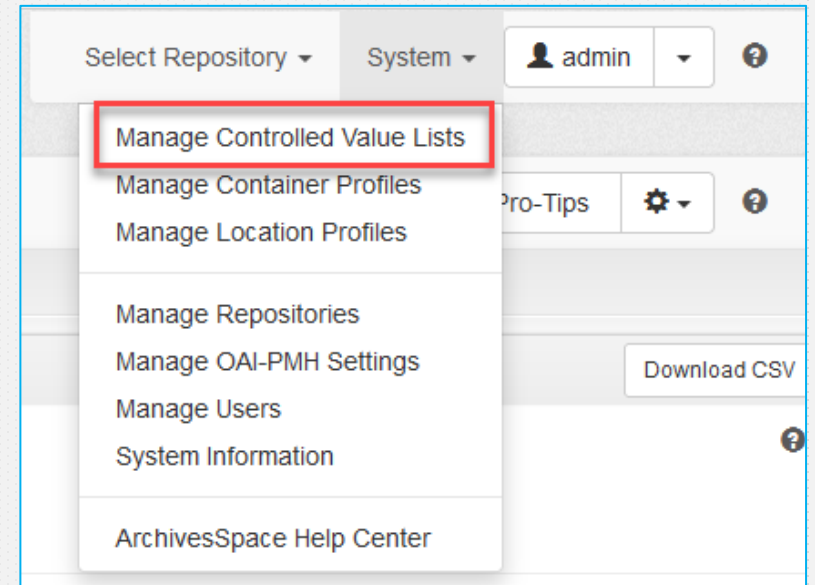
- Look very carefully at the notes in your pre-existing template
- You will see **n\_** and **p\_**
  - **N**ote and **P**ublish

<b>n_</b> arrangement	<b>p_</b> arrangement	<b>n_</b> bioghist	<b>p_</b> bioghist
<b>Arrangement</b>	<b>Publish Arrangement?</b>	<b>Biography/History</b>	<b>Publish Biographical History?</b>

# Spreadsheet importer

1. Add two new columns for the note you want to add
2. Follow the conventions seen in the notes that are already there
3. The gotcha here is what the notes should be called

- To determine that, go to System >
- Manage Controlled Value Lists
  - Note Singlepart Type (note\_singlepart\_type)
  - Note Multipart Type (note\_multipart\_type)



# Spreadsheet importer

Controlled Value List: Note Multipart Type (note\_multipart\_type)

Value	Translation	Position
accessrestrict	Conditions Governing Access	0 ↓
accruals	Accruals	1 ↑ ↓
acqinfo	Immediate Source of Acquisition	2 ↑ ↓
altformavail	Existence and Location of Copies	3 ↑ ↓
appraisal	Appraisal	4 ↑ ↓

- So, if I wanted to add an Other Finding Aids note, I would use **otherfindaid**

p_abstract	p_otherfindaid	n_otherfindaid	n_acqinfo
<b>Publish Abstract</b>	<b>Publish Other Finding Aid</b>	<b>Other Finding Aid</b>	<b>Acquisition Information</b>
	TRUE	Testing	

- I haven't tested every note! Give it a try.

### Tip?

- You “can” use the spreadsheet importer to bulk create Agents, Digital Objects, Subjects, and Top Containers by purposefully orphaning those records after ingest
  - REALLY think about this for Subjects and Agents, as you will be creating the bare minimum of a record, not a fully fleshed out record
  - This is not a supported use of this functionality, so while it *happens*, it’s **not in scope**

## Spreadsheet importer

---

1. In a Sandbox environment! Create a fake resource record.
2. Populate a spreadsheet template with enough dummy text to validate
3. Then add any **Agents, Subjects, Top Containers,** and/or **Digital Objects** that you want to create
4. Ingest the spreadsheet, and then delete the resource record

You have created those records in bulk!

## Spreadsheet importer

---

- There are limitations here
- Agent and Subject ingest is minimum and you will get a minimum record
  - But it is a record!
- You're filling up your **deleted\_records** table
  - My what?



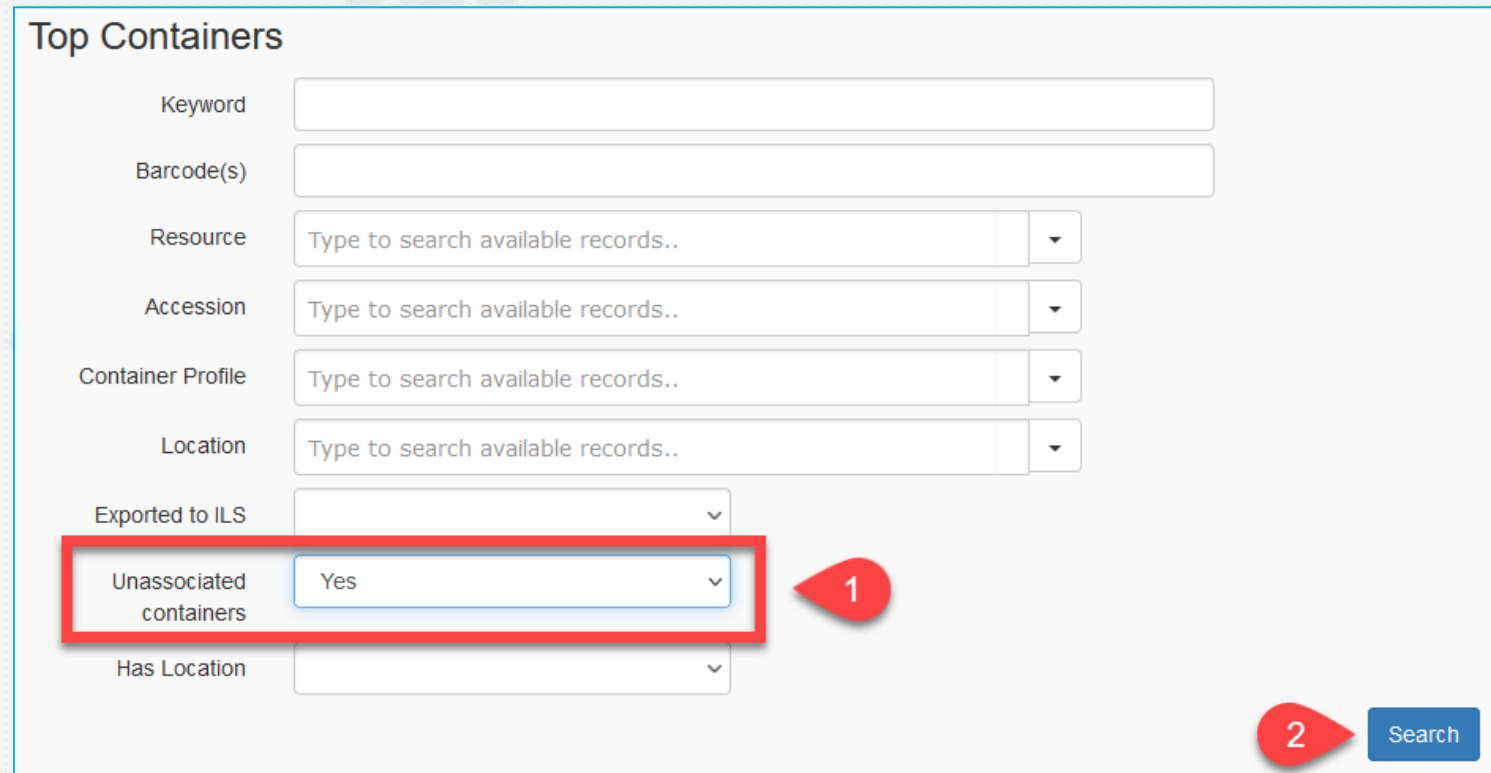
Pro-tips!

# Maintenance

- **Suggestion:** Check for and delete orphaned containers
  - Imagine you have a collection with 20 top containers (boxes) attached
  - Did you know that if you delete that resource, the containers stay?
    - These unattached records are called orphans
  - You might accumulate a lot of orphaned containers that you don't know about



- **Suggestion:** Check for and delete orphaned containers
  - Select repository
  - Gear menu



The screenshot shows a search interface titled "Top Containers". It contains several search criteria: Keyword, Barcode(s), Resource, Accession, Container Profile, Location, Exported to ILS, Unassociated containers, and Has Location. Each criterion has a corresponding input field or dropdown menu. A red box highlights the "Unassociated containers" dropdown, which is currently set to "Yes". A red callout bubble with the number "1" points to this dropdown. Another red callout bubble with the number "2" points to a blue "Search" button located at the bottom right of the form.

Field	Value
Keyword	
Barcode(s)	
Resource	Type to search available records..
Accession	Type to search available records..
Container Profile	Type to search available records..
Location	Type to search available records..
Exported to ILS	
Unassociated containers	Yes
Has Location	



- **FYI: The deleted records table**

- Every time you delete a record, ASpace retains a record of the record deleted
  - So, if you deleted an archival object, the information that gets recorded is *which* AO you deleted, not the entire AO itself
- That info is stored in a table in the database called *deleted\_records*
- Over years of use, you will fill up this table, which can affect performance
- If you suspect you might have a lot of deleted records, contact IT/your hosting provider to inquire about cleaning out this table
  - Note that you empty the table, you do not *delete* the table
  - Google “remove all records from a table SQL database”

Pro-tips!



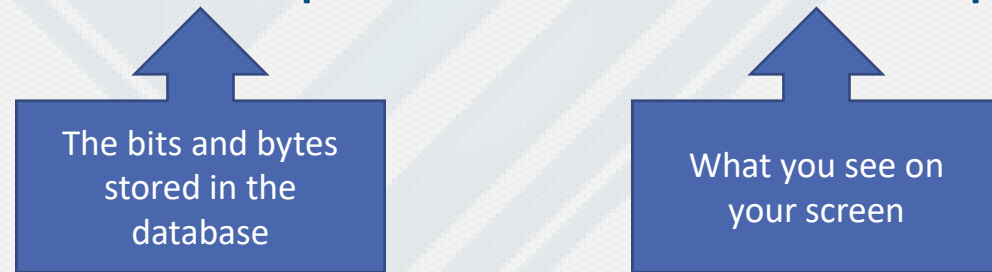
# Data vs Display

I have a limited understanding of this.  
This is simplified.

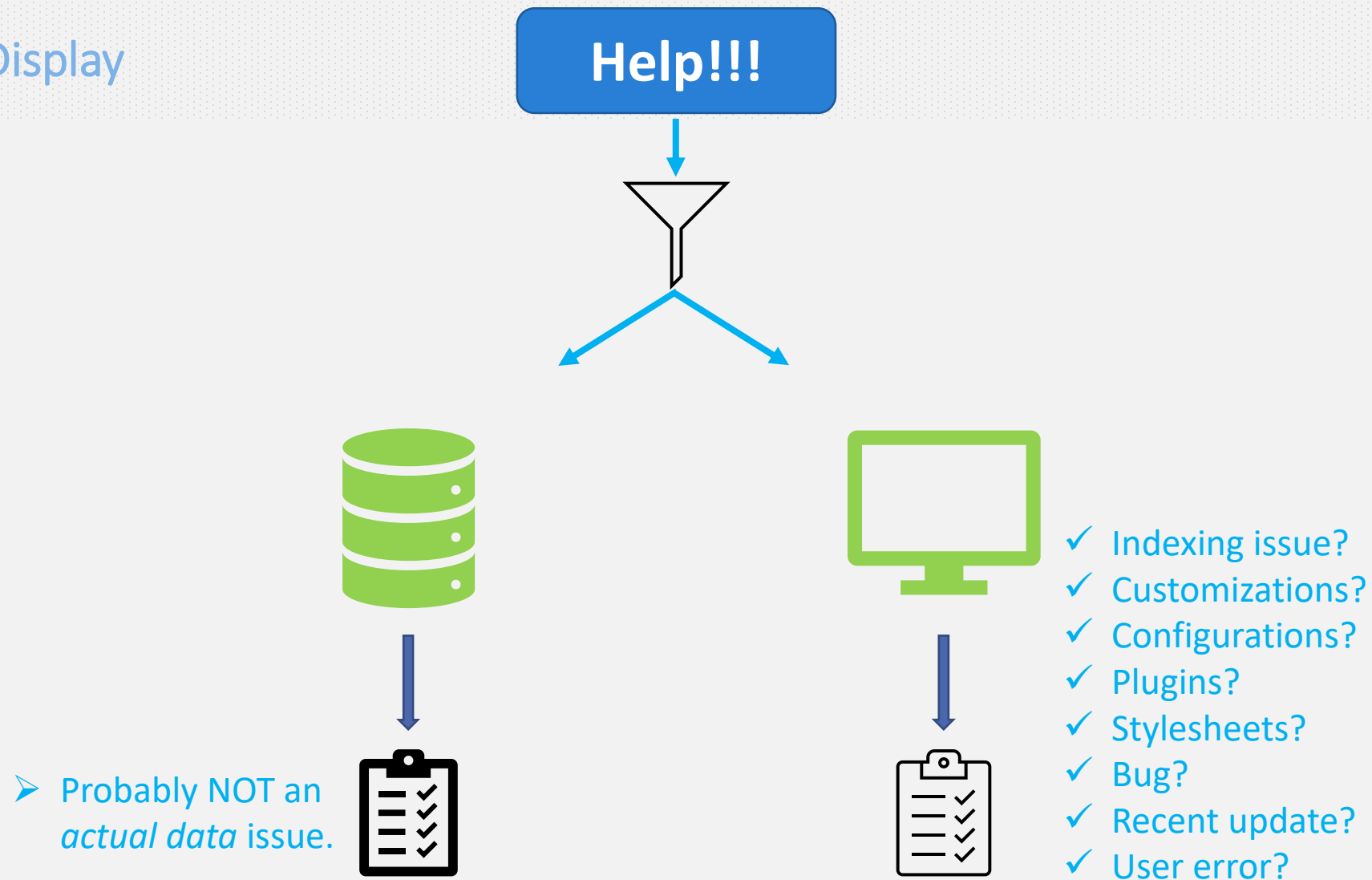
## Data versus Display



- I do A LOT of **troubleshooting** in my daily life
- And I work with colleagues who also do a lot of troubleshooting
- We've seen some crazy things
- When I hear a problem (any problem), my very first troubleshooting filter is whether this is a **DATA** problem or a **DISPLAY** problem



# Data versus Display



# Data versus Display

So, one point is:

1. If you are having trouble seeing, searching for, or displaying your data, don't panic. *Your data is probably\* fine.*

2. One of these is much more likely

- Each is solvable
- No data *loss*

- ✓ Indexing issue?
- ✓ Customizations?
- ✓ Configurations?
- ✓ Plugins?
- ✓ Stylesheets?
- ✓ Bug?
- ✓ Recent update?
- ✓ User error?

3. The PUI is a false witness; always troubleshoot **on the staff side in Edit mode**. If it's there, your data is fine.

\* Because absolutes are impossible.



A very common and disorienting display problem is an **indexing problem**

- Some indexing symptoms include:
  1. A difference in record **visibility** between the staff interface and the PUI
  2. Inaccurate record **counts**
  3. When **search** is affected
    - This can be subtle and unexpected and is a major takeaway from this section

## 2 Repositories

### Pro-Tips

🏠 **Repository**

Number of Collections: 2

### Test

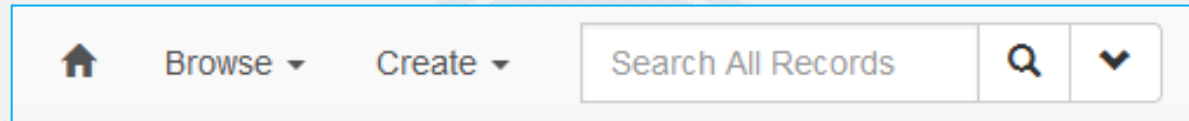
🏠 **Repository**

Number of Collections: 1

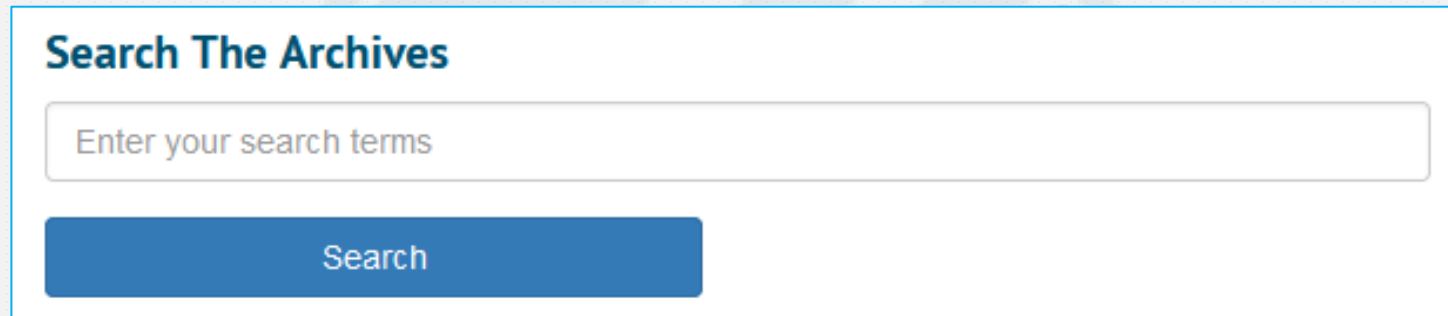
- AS relies on **solr indexing** for search
- If solr (or “the index”) is having trouble, search functionality will, too
  - That seems simple, bad index = bad search
- But the gotcha here is that ASpace is searching more often than you realize
- And the biggest gotcha I have for you today is:

**search powers display**

Search is more than these boxes:



A navigation bar containing a home icon, a 'Browse' dropdown menu, a 'Create' dropdown menu, a search input field with the text 'Search All Records', a search icon, and a dropdown arrow.



**Search The Archives**

Enter your search terms

Search

ASpace relies on searching in all these contexts:

- When you search
- When you **browse**
  - A “browse” is a “search for all”
- When you **export** a record, say as EAD
  - AS first searches for all the records that go into that EAD file, then formats them for you
  - So exporting EAD relies on search (relies on the indexer)... gotcha!
  - And when you export something as a PDF, AS starts with EAD, so, same thing
- And, when ASpace **displays context**
  - This is a big one

## Basic Information

Agent Type Corporate. Meh.  
Person  
Publish False

Created by admin 2021-08-02 17:20:14 -0400 | Last Modified by admin 2021-08-02 17:21:13 -0400 | URI: /agents/people/201

## Identity Information

### Name Forms



Morris Canal Banking Company

**Authorized** **Display Name**

## Linked Records

[Go to Search Results](#)

Showing 1 - 4 of 4 Results, Sort by: Relevance

Record Type	Title	Found in	Identifier	Dates	
Resource	Morris Canal Company records		MSS-001	1829 - 1904	<a href="#">View</a> <a href="#">Edit</a>
Resource	Another Collection		Another-02	1999	<a href="#">View</a> <a href="#">Edit</a>
Resource	Friends of Waterloo Village		Collection-0098	2021-08-23	<a href="#">View</a> <a href="#">Edit</a>
Resource	New Jersey History Collection		Another-90843	2021-08-03	<a href="#">View</a> <a href="#">Edit</a>

« 1 »

## Linked Records via Rights Statement

[Go to Search Results](#)

No records found

## Events

[Go to Search Results](#)

No records found

## Assessments - Surveyed By

[Go to Search Results](#)

No records found

## Assessments - Reviewer

[Go to Search Results](#)

Basic Information

Agent Type Person  
Publish False

Created by admin 2021-08-02 17:20:14 -0400 | Last Modified by admin 2021-08-02 17:21:13 -0400 | URI: /agents/people/201

Identity Information

Name Forms

➤ Morris Canal Banking Company

Authorized Display Name

This entire part of the “record” is search

This entire part of the record is *display*



\*The database is the only truth

**The index powers search and display**  
Sometimes **display is search**

**The PUI is nothing but display**

That was Bruce  
Willis the whole  
time!



Soylent Green  
is people!



## Data versus Display

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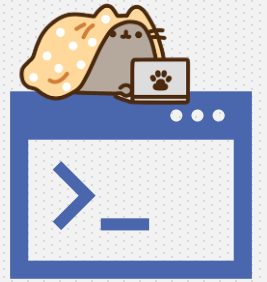
- This is why I say the PUI is a **false witness** for data concerns; it's relying on the data in the indexer
  - Not the bits and bytes stored in the database
- The indexer is fallible, so I eliminate it as a variable as soon as possible
  - How? On the **staff side, in Edit mode**
  - And this is my suggestion to you
- View mode on the SUI can be problematic too: use Edit mode



### FYI: Indexing solutions

- Try making a tiny change to a record you think is affected. Make the change, save, wait 5 minutes, see if the problem has resolved on the PUI.
  - This new save time triggers a reindex of that one record
- If your symptoms persist, you may have legit indexing issues
- The solution to that will involve IT/your hosting provider
  - They will delete the index (sounds harsh, but it's not) and it will rebuild itself
  - This can take hours to days (not an exaggeration)

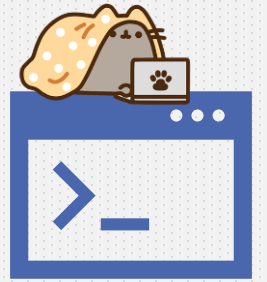
Thank you, tech-doc  
contributors and  
maintainers!



### FYI: Read the tech docs on indexing

- Google [re-creating indexes archivesspace](#)
- There is a [video linked from that page](#)
- That page taught me that targeted indexing is an option to help offset the time for full re-indexing
  - Just re-indexing one type of record at a time instead of the whole database
- You can trigger a reindex in the db with `system_mtime = NOW();`

Credit to Mark Custer  
and Maureen Cresci  
Callahan!



**FYI:** The entire JSON record is indexed in the PUI

- This can result in unexpected search problems
  - If the string you're looking for is in the JSON record, it'll create false hits
- It also results in a great search hack for **digital\_object**
  - [Demo](#)
- <https://archivesspace.atlassian.net/browse/ANW-1157>

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Regine Heberlein

Dumbledore's Army



#tech\_slash\_tools



# Thank you!



**ATLAS  
SYSTEMS**

*Library Excellence Through Efficiency*



Valerie Addonizio  
2021 August 04  
Demonstrated on v3.0.1