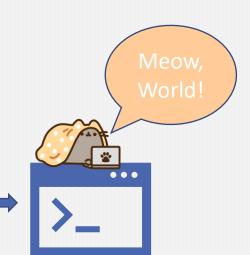
# Pro-tips, tricks, and shortcuts!





Valerie Addonizio
2021 August 04
Screenshots and functionality from v3.0.1

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

Oh, please do.











# Flipping the Ice Cream Switch

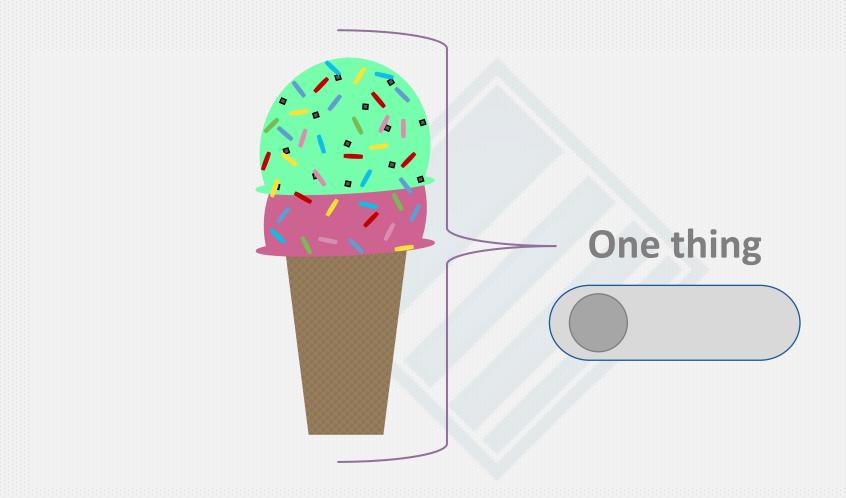








#### The Ice Cream Switch

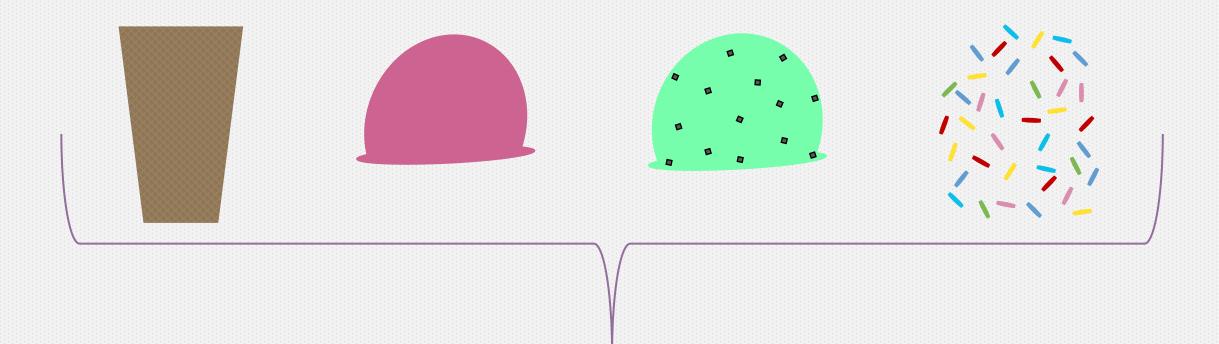












# **Multiple things**



```
The Morris Canal Company Photographs
```

Series I: Prints

Box 1:

## "a finding aid"

```
<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>
```

Paper

<EAD>

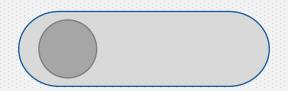




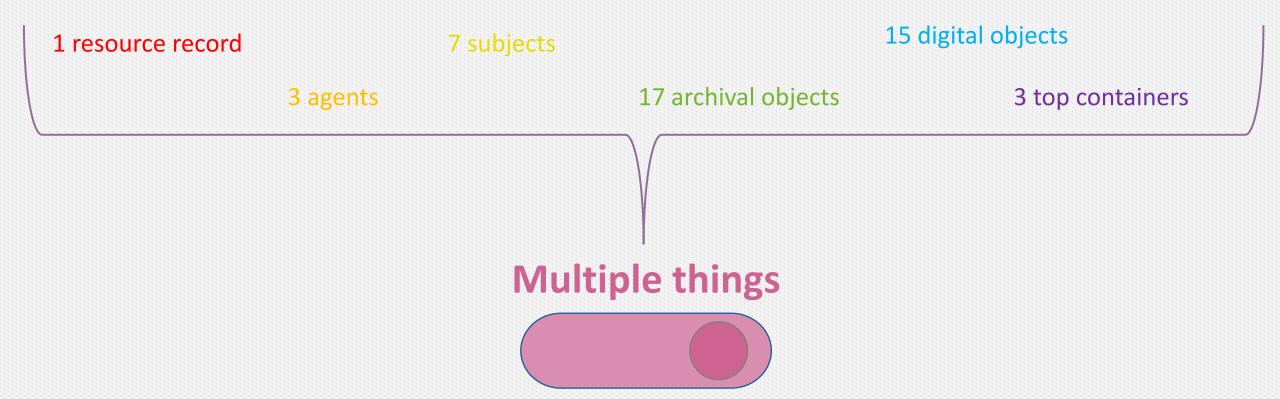
# "a finding aid"

Morris Canal Company records	Collection	Collection			
Series 1: Photographs, 1888-1922	Series	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		

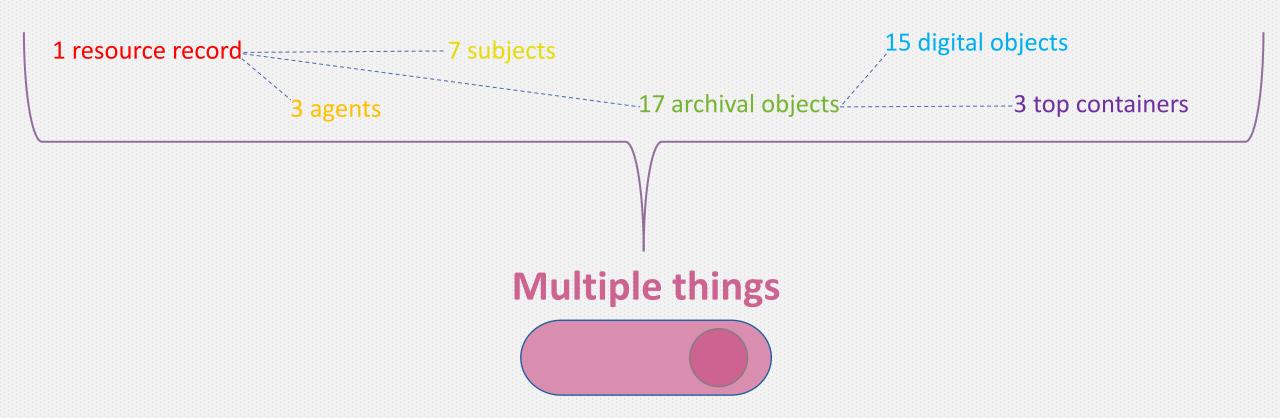
### One thing



# "a finding aid"



## "a finding aid"



## **Evolution of the Finding Aid**

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<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

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Pro-tips!

# Overview of Recent Features





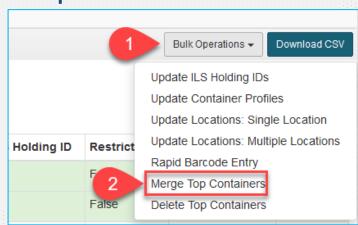




#### Merging top containers

- 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





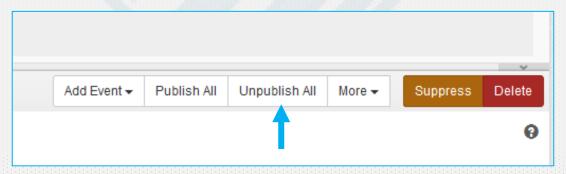






#### Unpublish All and options at every level

- 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















# 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









admin

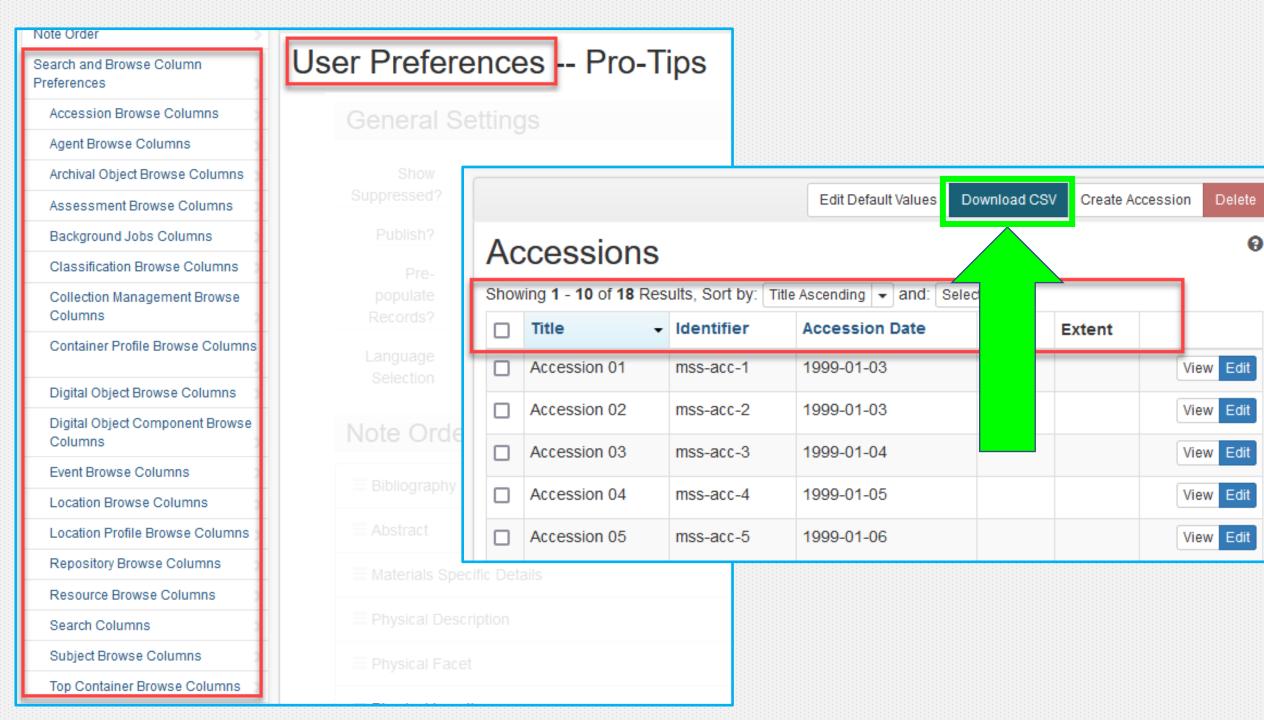
Global Preferences
Repository Preferences
User Preferences

Become User

Logout

Select Repository -

<sup>\*</sup> I promise nothing.



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









 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
EAD ID	Resource URI	REF ID	Arch. Obj. URI
	/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?)

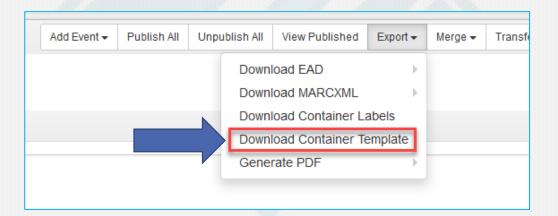








- Though not what it was intended for, if you download the new Container Template you will get the info you need to link AOs and DOs
- Note that you do not get this template from an external source
  - ASpace generates this template for you from within a Resource record













Archival Object	Archival Object	Archival Object	Archival Object	Resource
archival_object_id	ref_id	component_id	archival_object_title	resource_title
Archival Object ID	Ref ID	Component ID		Resource Title
108	c45ecc62ae8b069f20659c02db19a3f0			Morris Canal Company records
109	2460b510a7fd2d74c23e2ba59ccb9863		Paste these into the	Morris Canal Company records
110	a3a1ce453ade5c5c3b15f010d151d192		DO spreadsheet and	Morris Canal Company records
111	d00463ac5a1f6940680fa3e750531ff5		•	Morris Canal Company records
112	32c576ddf8333e4404317be34e95cdf5		you're ready to roll	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	64fbe63ee56591f49fcadcfcdddfb2f1		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	And you even	Letter-press copybook (outbound)	Morris Canal Company records
123	a7653fa234b12028a9c3657adcc1cd77	have the unittitles	etter-press copybook (outbound)	Morris Canal Company records
124	ff597fdb86e97e35217ee05e2b8f1edc	for gut-checks on	tter-press copybook (outbound)	Morris Canal Company records
125	f7244f592e73dc8313c6338c4761c1c2	which AOs you're	Letter-press copybook (outbound)	Morris Canal Company records
126	8aba75c44436118ad32a4a9feb05d5d5	linking to	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









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





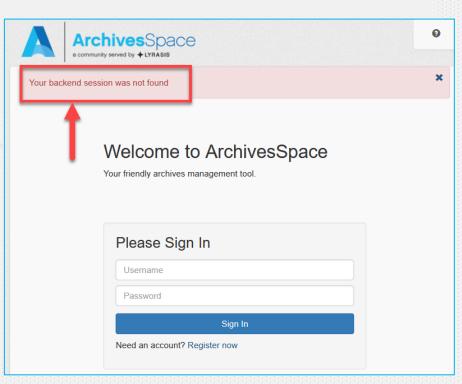




#### FYI: You can increase the time before ASpace automatically logs you out

- This is called session time
- It's managed in seconds
- ¬AppConfig[:session\_expire\_after\_seconds] = 3600













- 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



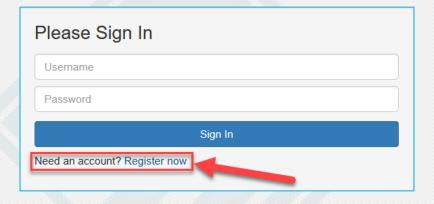








• FYI: You can remove the Register Now link, to prevent spam



AppConfig[:allow\_user\_registration] = false

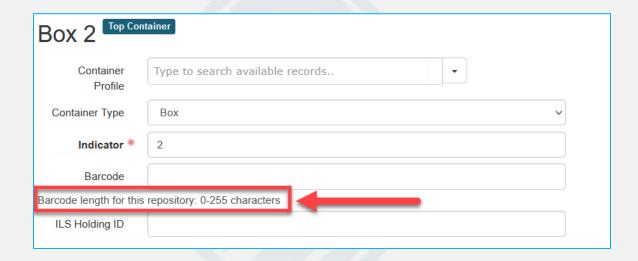








FYI: You can change the barcode length (globally or per repo)











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



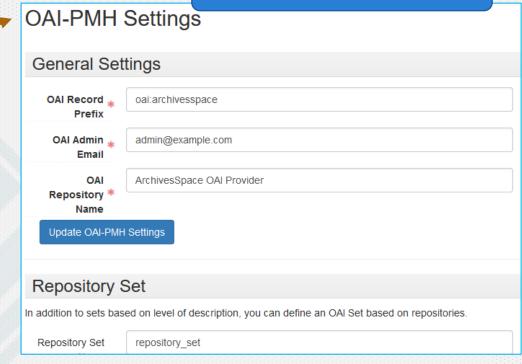






# 1. In the Repository record OAI Harvest Settings These options affect OAI-PMH for this repository only. Click below to view/edit global OAI options. This will leave current form without saving changes. View/Edit Global OAI Settings OAI Harvesting □ Disabled? Sets included in OAI

#### 2. In OAI-PMH Settings



But *this* setting is in the config:

PappConfig[: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:

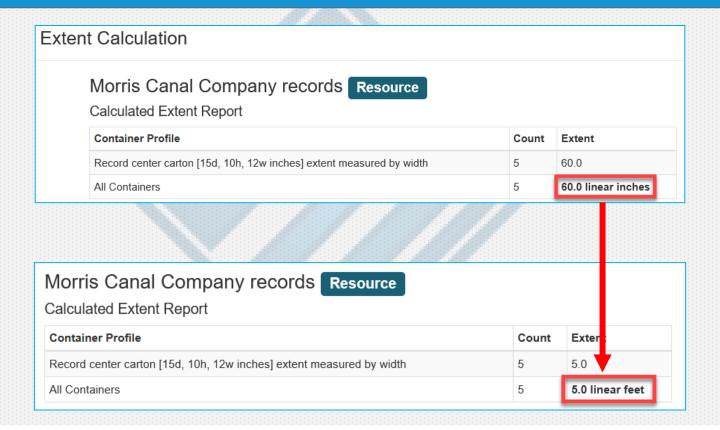








In this example I changed the unit of measure from inches to feet



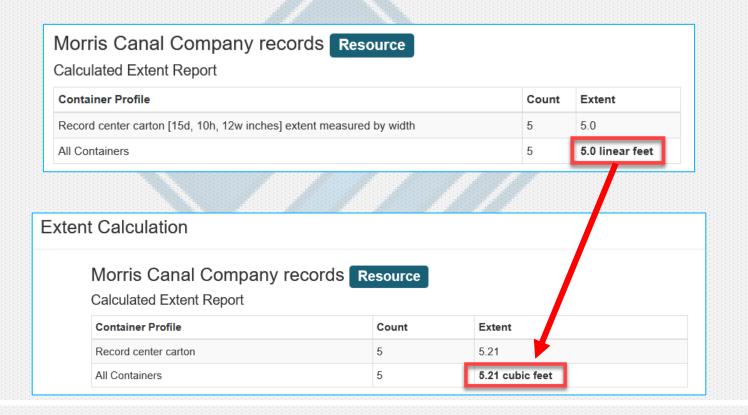








In this example I changed the type of measure from linear to volume











Pro-tips!

# Random tips!





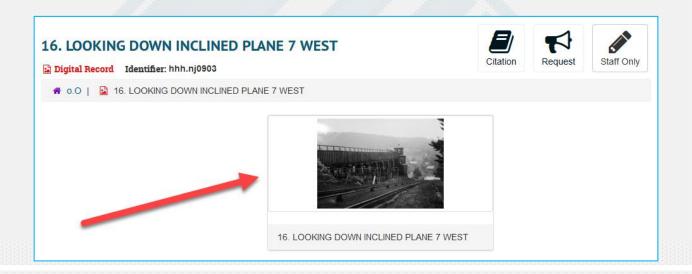


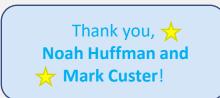




#### FYI: You can add thumbnails to digital objects

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





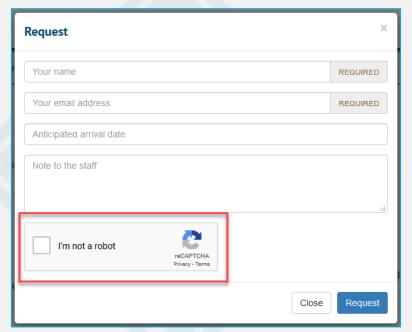








• FYI: You can install the reCAPTCHA plugin to prevent spam via the PUI request form



• 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

Disable Reorder Mode Cut Paste Move ▼ Close Record 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 > Series 2: Business Correspondence, 1900-1909 Series

Shift + Click





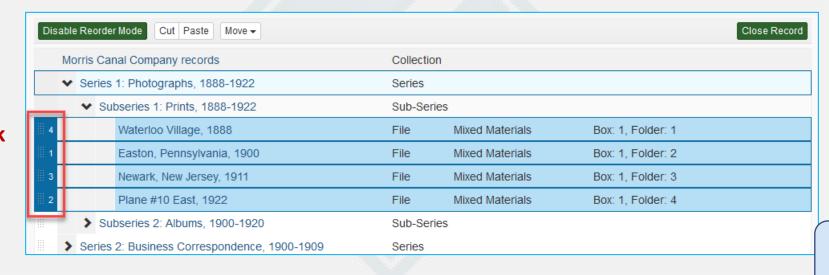






# FYI: Some tips when using re-order mode!

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



Ctrl + Click



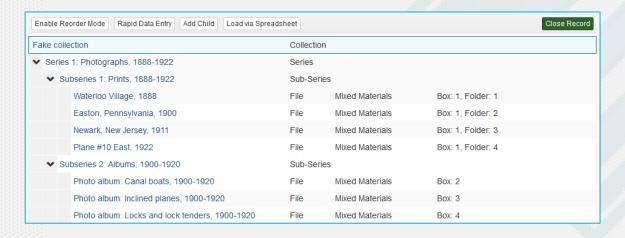








- FYI: Some tips when using re-order mode!
- Need to delete a whole bunch of stuff?
- Move everything into a single series and then delete



Di	sable Re	order Mode Cut Paste				Close Record
	Fake (	Fake collection		n		
	➤ Series 1: Photographs, 1888-1922		Series	Series		
		Subseries 1: Prints, 1888-1922		Sub-Series 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	

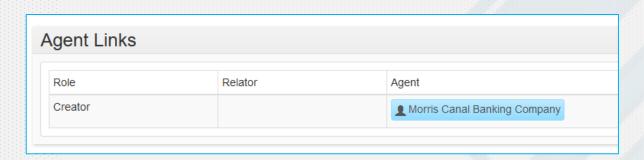




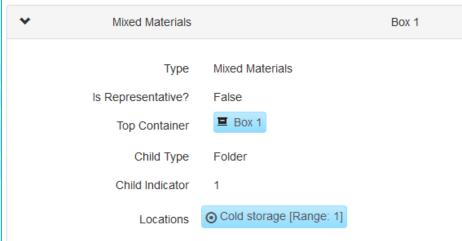




 Prompt: Have you ever noticed that certain records display as blue in View mode on the staff interface?







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."











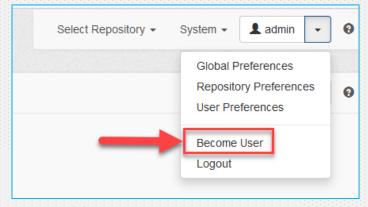
- Prompt: Have you checked your permission groups lately?
  - I am assuming permission groups are something you set up awhile ago and rarely, if ever, return to
  - Your permissions affect your view of ASpace
  - Staff may not realize they are missing functionality that they want/need
  - It has been 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

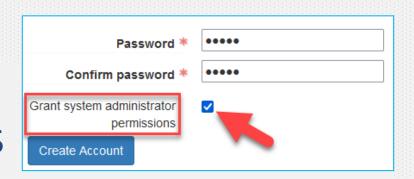








- FYI: Admin versus system administrators
- "The Admin" is the most powerful account in AS
  - The username literally spelled a-d-m-i-n
  - Defaults to full permissions
- But System Administrators are everyday AS accounts granted additional privileges
- The only difference I am aware of (on the staff 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





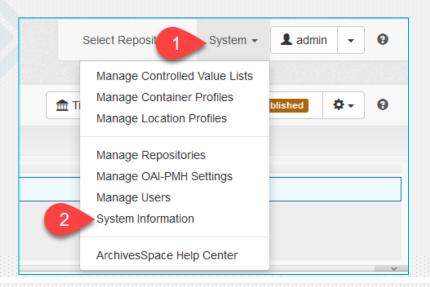








- FYI: The admin account can see system logs in real time in the SUI
  - Only "The Admin"
  - Your database administrator or hosting provider is probably the person/people with that password
  - But anyone can try this out in the <u>AS Sandbox!</u>



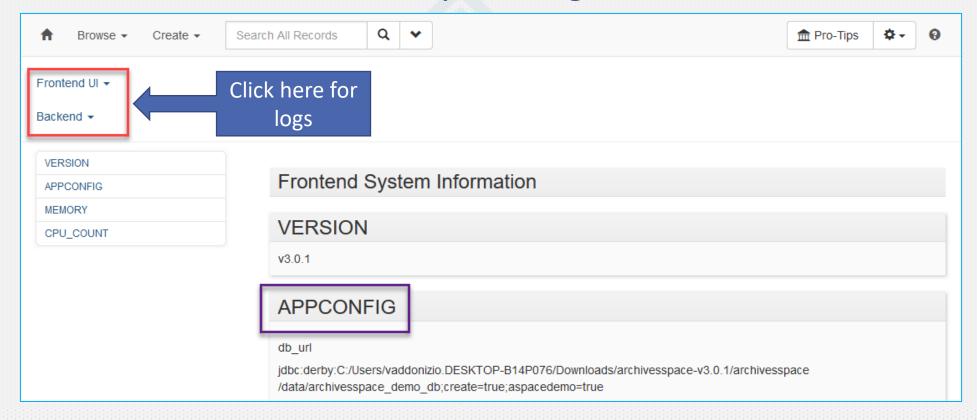








FYI: The admin account can see system logs in real time in the SUI











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

```
Frontend UI -
Backend ▼
Frontend Log
                                                                                                                                 Follow Loa
    [2021-08-04T08:51:02.595000 #19772] INFO --: Processing by SystemInfoController#stream log as */*
    [2021-08-04T08:51:02.608000 #19772] INFO -- : Completed 200 OK in 12ms (Views: 2.7ms)
    [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"}
```

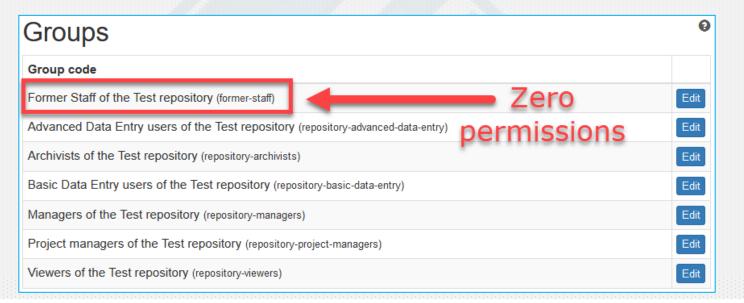








- Suggestion: Create a user group for old accounts
  - What do you do when people/students leave your organization?
  - Consider a user group with zero permissions and move old staff accounts there
  - Remember to also remove them from whatever group(s) they started in













- 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)











# 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) (<a href="here">here</a>)









- 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.

<sup>\*</sup> 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 <u>Notes</u>.
  - Has the ability to add <u>Agents</u> 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, <u>found here</u>
  - 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



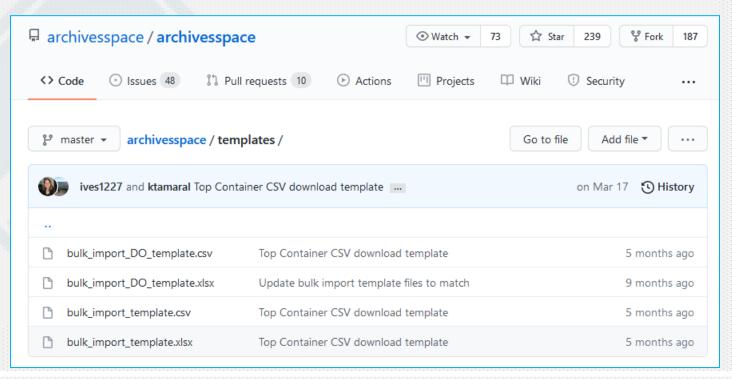






# FYI: How to download these templates off GitHub

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





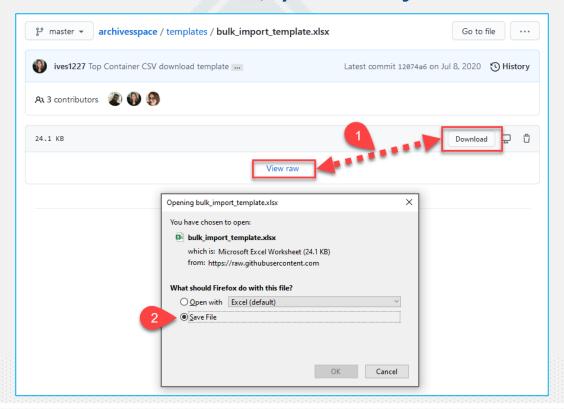






# FYI: How to download these templates off GitHub

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





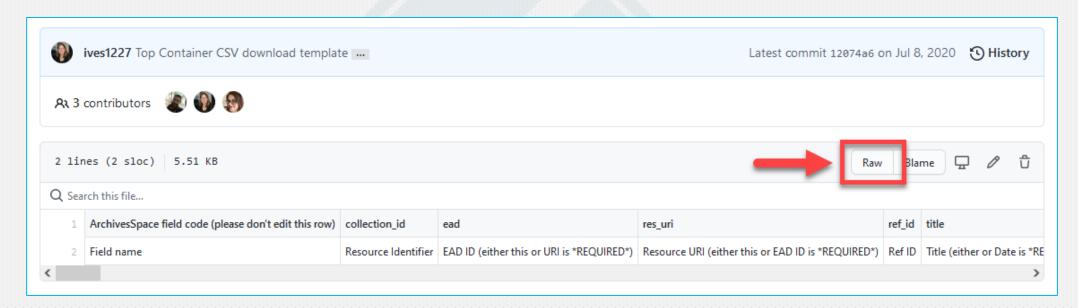






# FYI: How to download these templates off GitHub

- 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:











# 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 la ngmaterial,p langmaterial,l lang 2,1 langscript 2,n langmaterial 2,p langmaterial 2,dates label,begin,end,date type,expression,date certainty,date s label 2, 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, typ e 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 obje ct title, digital object link, thumbnail, people agent record id 1, people agent header 1, people agent role 1, people agent relator 1, people agent reco rd id 2, people agent header 2, people agent role 2, people agent relator 2, people agent record id 3, people agent header 2, people agent role 3, people agent relator 3, people agent record id 4, people agent header 4, people agent role 4, people agent relator id 5, people agent h eader 5, people agent role 5, people agent relator 5, families agent record id 1, families agent header 1, fami lies agent relator 1, families agent record id 2, families agent header 2, families agent role 2, families agent relator 2, corr cord id 1,corporat Save Page As... e entities agent header 1, corporate entities agent role 1, corporate entities agent relator 1, corporate en ,corporate entiti es agent header 2, corporate entities agent role 2, corporate entities agent relator 2, corporate entities te entities agent header 3, corporate entities agent role 3, corporate entities agent relator 3, subject 1 record id, sub ubject 1 source, su bject 2 record id, subject 2 term, subject 2 type, subject 2 source, n abstract, p abstract, n accessr crict, p fo,p acqinfo,n arr angement,p arrangement,n bioghist,p bioghist,n custodhist,p custodhist,n dimensions,p dimensions,p dimensions,p Send Page to Device esc, n physfacet, p p hysfacet,n physloc,p\_physloc,n\_prefercite,p\_prefercite,n\_ rial,p re ntent,p scopeconte nt,n separatedmaterial,p separatedmaterial,n userestrict, Right-click or Field name ,Resource Identifier,EAD ID (either this or UR his or EA ID , Title (either or Date is \*REQUIRED\*), Component Unique Identifier, Hierar ion Level Take Screenshot ge (2),Sc: Level, Publish?, Restrictions Apply?, Processing Note, Langua equivalent, Save As (2), Publish?, Date(1) Label, Date(1) Begin, Date(1) end, Date , Date (1) , Date (2) View Page Source Certain Begin, Date(2) end, Date(2) Type \*REQUIRED\* if specifying it number .txt or .csv \*REQUIRED\* if specifying Extent, "Extent type: cubic feet, nt",Conta: tc. \*REQUIRED\* if Details, Dimensions, Extent portion(2), Extent number(2) \*RE tent type specifying second Extent", Container Summary(2), Physical D nce Type, Container [indicator], barcode, Child type, Child indicator, Grandchild type, Grandchild indicator, Container instance Ty e(2),Top Container [indicator](2), barcode(2), Child type(2), Child indicator(2), Grandchild type(2), Grandchild indicator(2), Digi-Object Title, 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?









# 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 spécial characters, and especially if you copy and paste them from somewhere, beware of character encoding issoles
  - AS accepts UTF-8 characters

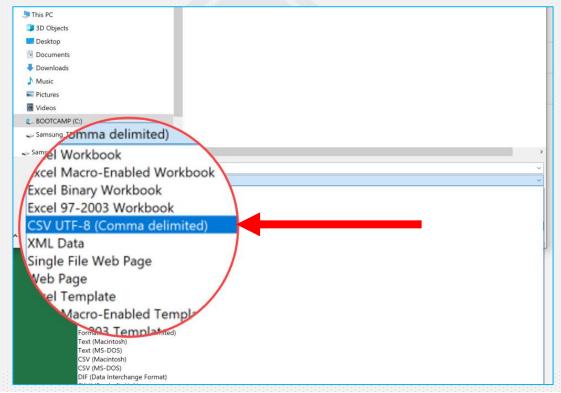








 A way to eliminate character encoding issues is to use the CSV version of the spreadsheet and be sure and Save As UTF-8







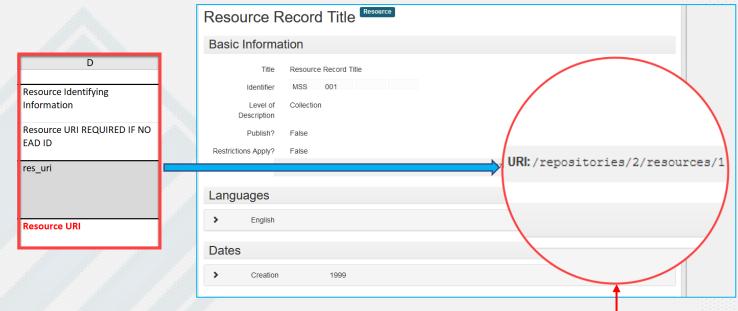




Speaking of the new templates, what are URIs?

• Uniform Resource Identifier

- Contrast to U-R-L
  - Uniform Resource Locator



URL: http://sandbox.archivesspace.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** 









- Look very carefully at the notes in your pre-existing template
- You will see n\_ and p\_
  - Note and Publish

n_arrangement	p_arrangement	<b>n</b> _bioghist	p_bioghist
Arrangement	Publish Arrangement?	Biography/History	Publish Biographical History?



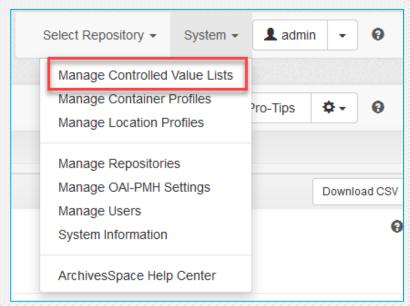






- 1. Add two new columns for the note you want to add
- 2. Follow the conventions seen in the notes that are already there
- 3. The gotcha here is what the notes should be called

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











#### Controlled Value List: Note Multipart Type (note\_multipart\_type) **Translation Position** Value 0 🖡 Conditions Governing Access accessrestrict 1 1 accruals Accruals 2 ↑ ↓ Immediate Source of Acquisition acginfo 3 1 1 altformavail Existence and Location of Copies 4 ↑ ↓ appraisal Appraisal

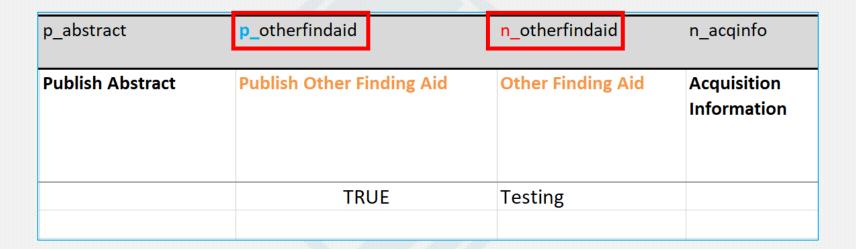








So, if I wanted to add an Other Finding Aids note, I would use otherfindaid



• 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









- 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!









- 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









#### 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





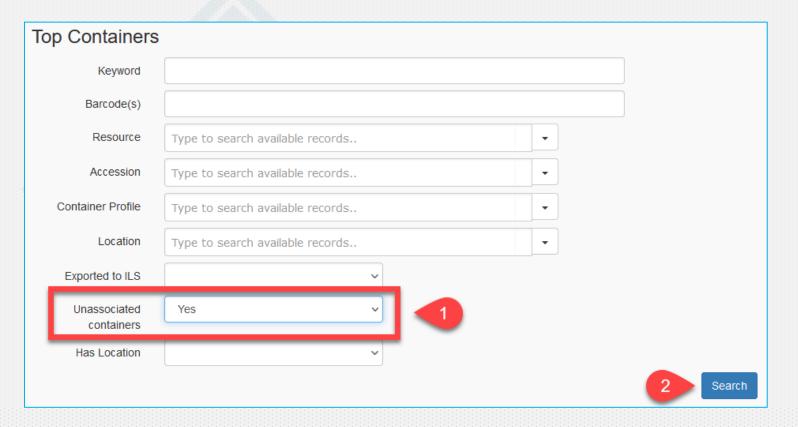






#### Maintenance

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













- 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 <u>deleted\_records</u>
  - 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!



I have a limited understanding of this.

This is simplified.



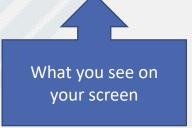






- I do A LOT of troubleshooting in my daily life
- And I work with colleagues who also do a lot of troubleshooting
- We've seen some crazy things
- When I hear a problem (any problem), my very first troubleshooting filter is whether this is a DATA problem or a DISPLAY problem

The bits and bytes stored in the database

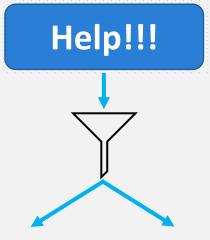


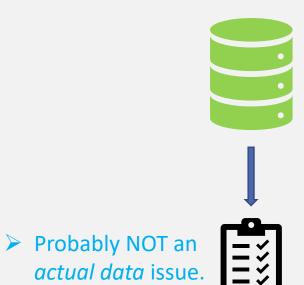
















- ✓ Customizations?
- ✓ Configurations?
- ✓ Plugins?
- ✓ Stylesheets?
- ✓ Bug?
- ✓ Recent update?
- ✓ User error?











#### 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.

<sup>\*</sup> 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
  - When search is affected
    - This can be subtle and unexpected and is a major takeaway from this section











- 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

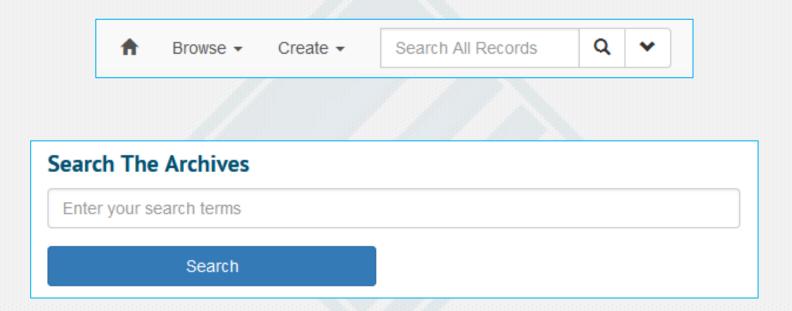








#### Search is more than these boxes:











#### ASpace relies on searching in all these contexts:

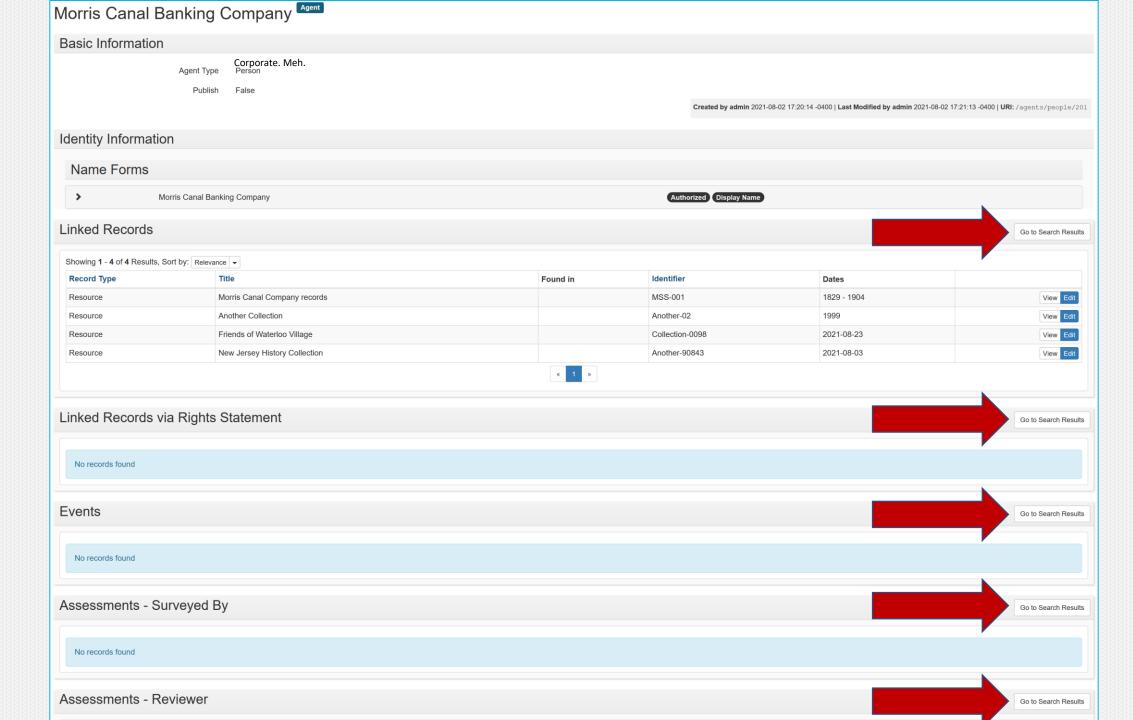
- When you search
- When you browse
  - A "browse" is a "search for all"
- When you export a record, say as EAD
  - AS first searches for all the records that go into that EAD file, then formats them for you
  - So exporting EAD relies on search (relies on the indexer)... gotcha!
  - And when you export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













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!











- 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)













#### 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();











#### 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











## Thank you!





Valerie Addonizio 2021 August 04 Demonstrated on v3.0.1