



# Understanding the Changes to the Agents Module in ArchivesSpace 3.x and higher

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## What we'll cover

- What is an agent?
- Why did we change agents?
- What you can do with agents in 3.x and higher versions
- Some tips for making the transition easier



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## Agents in ArchivesSpace

- Describe people, families, and corporate entities like institutions, organizations, and conferences
- Can link to any type of record in ArchivesSpace that describes archival material, like accessions, resources, resource components, digital objects, and digital object components
- Can link to classifications, to indicate the creator of parts of a record group structure
- Can link to events and assessments, as part of recording actions taken with archival material
- And can link to each other, to indicate relationships between people, families, and corporate entities



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## Agents in ArchivesSpace

- Are created once and then can be linked many times
- When linked to a record describing archival material, the relationship to the material is defined as a
  - Creator
  - Subject
  - Source (usually a donor)
- Relationship can be further described using a relator term like correspondent, composer, translator, performer, and many more



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## Agents in ArchivesSpace

- Can be created one at a time within ArchivesSpace or in bulk using the API
- Can be brought in through imports, either on their own or as part of records describing archival material
- The LCNAF plugin that comes with a standard ArchivesSpace deployment is an example of a mechanism for querying an external authority database and pulling records into ArchivesSpace



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## Agents in ArchivesSpace 3.x and higher

Primary goals of the Agents module expansion

- Greater compliance with metadata standards used to describe persons, families, and corporate entities i.e. MARCXML authority and EAC-CPF.
- Facilitate better exchange with databases like LCNAF and Social Networks and Archival Context (SNAC - <https://snaccooperative.org/>) that use these standards by being able to record the information about agents that they require.
- Provide for better contextualization of agents by providing more ways to apply controlled access headings or information about the agent and their relationships.



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## Agents in ArchivesSpace 3.x and higher

- More sub-records and fields
- More imports and exports
- More opportunities to develop and refine local practices around agents



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## Agents in ArchivesSpace 3.x and higher

- Even though this expansion adds considerably to the possibilities for recording information about agents and their relationships, the requirements to make a valid agent remain minimal: an agent type and one Name Form sub-record.
- Requirement for Source/Rules has been relaxed to reflect different ways this information is being captured in the new schema.
- Some sub-records have requirements to make the sub-record valid, but the sub-records themselves are not required.
- To take full advantage of the changes to create more standards-compliant metadata, you will need to enter more than the required fields.



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## Agents in ArchivesSpace 3.x and higher

An Agent record form is now divided into five sections (though still all on one form). Each contains a set of sub-records. The sections are not sub-records themselves.

- Basic Information
- Record Control Information
- Identity Information
- Description Information
- Relation Information

These sections appear on the lefthand sidebar, with the relevant sub-records for each grouped underneath.



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## Agents in ArchivesSpace 3.x and higher

**Basic Information:** used to indicate the agent type and whether the agent is published or not.

Save

New Person Agent

Basic Information

Agent Type **Person**

Publish



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## Agents in ArchivesSpace 3.x and higher

**Record Control Information:** information about the record itself, with the expectation that it originated outside of ArchivesSpace or is going to be shared with a system other than ArchivesSpace.

Record Control Information	
Record IDs	<input type="button" value="Add Record ID"/>
Record Info	<input type="button" value="Add Record Info"/>
Other Agency Codes	<input type="button" value="Add Agency Code"/>
Convention Declarations	<input type="button" value="Add Convention Declaration"/>
Maintenance History	<input type="button" value="Add Event"/>
Sources	<input type="button" value="Add Source"/>
Alternate Sets	<input type="button" value="Add Alternative Set"/>



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## Record Control Information

New sub-records:

- Record IDs
- Record Info
- Other Agency Codes
- Convention Declarations
- Maintenance History
- Sources
- Alternate Sets

Software does not have a Record Control section since this type of agent is only for use within ArchivesSpace.



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## Agents in ArchivesSpace 3.x and higher

**Identity Information:** the core information about the agent him/her/themselves. Name Form is the only required sub-record in an Agent record.



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## Identity Information

New sub-records:

- Entity IDs

New fields in Name Form

- All Agent Types:
  - Language
  - Script
  - Transliteration
  - Parallel Names sub-record
- New fields in Name Form
- Family:
  - Family Type
  - Location
- Corporate Entity:
  - Location
  - Conference Meeting?
  - Jurisdiction?



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## Identity Information

Change to existing sub-record/fields

- Dates in Dates of Existence and Dates of Name Use
- New structure to provide for standardized dates and begin/end dates of expression
- Please note that because of numerous requests, Dates of Existence is now added to the display name for the agent if there is no entry in the Dates field for the name form indicated to be the Display Name. If this is not desired for an individual agent, uncheck Automatically generate for the Sort Name for that agent.

Sort Name \*

Automatically generate



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## Agents in ArchivesSpace 3.x and higher

**Description Information:** further descriptive information about the agent, including controlled access terms that describe the agent.

Description Information	
Dates of Existence	<input type="button" value="Add Date Set"/>
Gender	<input type="button" value="Add Gender Info"/>
Places	<input type="button" value="Add Place"/>
Occupations	<input type="button" value="Add Occupation"/>
Functions	<input type="button" value="Add Function"/>
Topics	<input type="button" value="Add Topic"/>
Languages	<input type="button" value="Add Language"/>



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## Description Information

New sub-records:

- Gender – this is a configurable value list; ArchivesSpace ships with no values but an indication of some possible externally derived controlled vocabularies
- Places – geographic subject terms related to the agent such as place of birth, residence
- Occupations – occupation subject terms related to the agent
- Functions – function subject terms related to the agent
- Topics – topical subject terms related to the agent
- Languages – controlled value languages and notes related to languages used by or associated with the agent



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## Description Information

Change to existing fields in sub-records:

- Contact Details
  - Contact notes now a full repeatable sub-record with fields for Persistent ID, Date of Contact (text, not date), and Contact Notes to give more structure
- Dates of Existence
  - New structure to provide for standardized dates and begin/end dates of expression



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# Description Information

More Notes and subnotes

- Person
  - Biographical/Historical (subnotes: Abstract, Chronology, Citation, Defined List, Ordered List, Outline, Text)
  - General Context (subnotes: Defined List, Ordered List, Outline, Text)
- Family
  - Biographical/Historical same as Person
  - General Context same as Person
  - Structure or Genealogy (subnotes: Defined List, Ordered List, Outline, Text)
- Corporate Entity
  - Biographical/Historical same as Person
  - General Context same as Person
  - Legal Status (subnotes Citation, Text)
  - Mandate (subnotes Citation, Text)
  - Structure or Genealogy same as Family
- Software
  - Biographical/Historical same as Person
  - General Context same as Person



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# Agents in ArchivesSpace 3.x and higher

**Relation Information:** used to indicate relationships to other agents or materials inside or outside ArchivesSpace.

Relation Information

Related External Resources Add Related External Resource

Related Agents Add Related Agent

Save Person +1
Cancel



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## Relation Information

New sub-records:

- Related External Resources

Changes to existing sub-records:

- Additional relationships in Related Agents



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## Agents in ArchivesSpace 3.x and higher

Import and Export Changes

- New standalone MARCXML authority import and export
- Better EAC-CPF import and export



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## Making the transition easier

- Consider and formalize your local practices
  - Review the changes and work out which sub-records and fields you typically will use and what you won't
    - Formalize in documentation, if you can
  - Do a test migration and review the results if you can
    - Especially important if you already have a lot of agents
  - Work out a data cleanup strategy if the migration exposes issues/differences with your data
  - Consider iterative data cleanup/enhancement to take advantage of the new possibilities



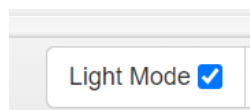
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## Making the transition easier

Consider Light mode



- Light mode is a staff interface view of agents with fewer fields and sub-records – similar to pre-3.x versions of ArchivesSpace
- The underlying data schema is the same for everyone, but the view a particular user sees is dependent on permissions and choice.
- Even once you upgrade, if you want only some of your users to work with these new fields, or only want to work with them on some records, you will have a choice
- Light mode setting does not impact imports/exports/view in the public interface



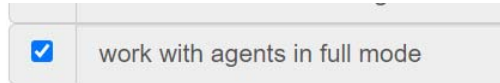
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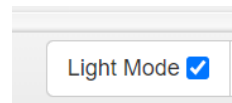


## Making the transition easier

“work with agents in full mode” permission will be off by default for users below Archivists in the built-in permission groups



Light mode check box is sticky – once set, stays in that mode for user unless changed by unchecking/checking



As always in ArchivesSpace, all fields/sub-records with data will appear in View mode – a user may be able to see data they can't change

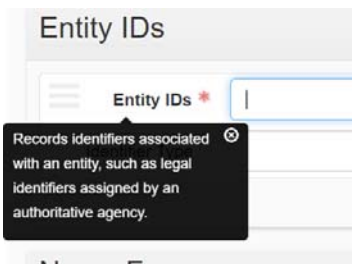


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## Making the transition easier

- Customize the tooltips



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## Making the transition easier

- Use Edit Required Fields

The screenshot shows a web form titled "Agent Record Required Fields (Person)". It is divided into three main sections: "Basic Information", "Record IDs", and "Record Info".

- Basic Information:** Shows "Agent Type" set to "Person".
- Record IDs:** Includes a "Record Identifier" field with a red asterisk, a "Source" field with a red asterisk, and a "Record Control Identifier Type" field with a checkbox.
- Record Info:** Includes a "Record Control Maintenance Status" field with a red asterisk and a "Record Control" field with a checked checkbox.

Each section has an "Add Record ID" or "Add Record Info" button and a close button (X).



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## Making the transition easier

- Use Edit Default Values

The screenshot shows a web form titled "Convention Declarations". It has a "Add Convention Declaration" button in the top right corner.

- Convention:** A dropdown menu showing "Describing Archives: A Content Standard".
- Citation:** A text field containing "Society of American Archivists. Describing Archives: A Content Standard (Chicago: Society o".
- Descriptive Note:** An empty text area.
- File URI:** An empty text field.



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## Other things to know

- This was the first overhaul of a major record type since the original release of ArchivesSpace – it has been a complex process to get here!
- Thanks to everyone who wrote or reviewed the specification, wrote or reviewed code, provided ideas and feedback, and did testing for the many steps along the way.



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## Other things to know

- As more people work with the expanded agents module in production, we expect some changes will be requested.
  - Different or additional choices for imports or exports
  - Different or additional choices for views, including light mode
  - Refinement of linking or more reuse of data between agents and material description records like resources
- **As always, any additional work on agents would need to be balanced with the many other requests the community has for improvement of ArchivesSpace and maintenance of the infrastructure of the application.**



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## More help

- User manual documentation:  
<https://archivesspace.atlassian.net/wiki/spaces/ArchivesSpaceUserManual/pages/1993441340/Managing+Agents+as+of+v3.0>
- Help Center video tutorials:  
<https://archivesspace.atlassian.net/wiki/spaces/ArchivesSpaceUserManual/pages/915341364/Agent+Records+Module>
- Upcoming trainings:  
<https://archivesspace.atlassian.net/wiki/spaces/ADC/pages/2331148319/ArchivesSpace+Community-Wide+Virtual+Training>
- Introductory webinar from January:  
<https://archivesspace.org/archives/6660>



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