

Accession Creation in ArchivesSpace documentation

ArchivesSpace Version 3.3.1

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Table of Contents

Getting Started	3
Questions?	3
General Tips	3
Creating a New Accession.....	4
Basic Information.....	4
Dates Through Rights Statements.....	5
Related Records.....	5
Related Resources.....	5
Component Links	5
Related Accessions	6
Collection Management.....	7
Deaccessions	8
Deaccession Fields	8
Deaccession Dates	9
Deaccession Extents.....	9
Events.....	9
Spawning a Resource Record.....	11
Text Formatting Considerations	11
Spawning an Accession Record	12
Appendix.....	13
Example 1	13
Example 2	14
Example 3	16

Getting Started

- Go to <https://aspace.dlib.indiana.edu/>
- Type the username and password given to you (your CAS login)
- Select your repository from the dropdown “Select Repository” Menu at the top of the page.
- It may be helpful to practice the methods included in this documentation. To do so in a space that will not be published to archives.iu.edu, please use our Training Repository. Please e-mail dcshelp@indiana.edu to gain access to the repository.

Questions?

Please consult the [ArchivesSpace Glossary](#) with questions about terms used in the following pages.

Please e-mail dcshelp@indiana.edu with any questions.

General Tips

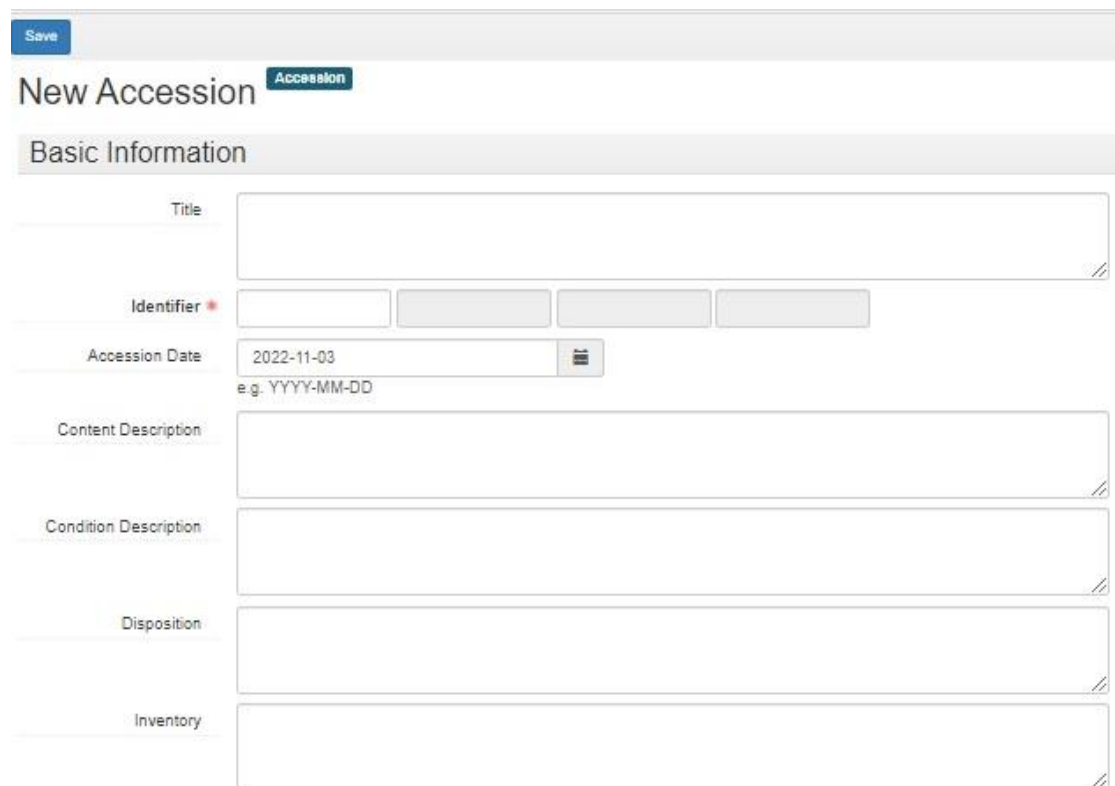
- Save often!
- Text formatting in the Accessions module is not consistent with the Resource module. At this time, emphasizing text (e.g., italics, bold, etc.) is not possible in accession records with the exception of the title. However, a title that has been bolded in an accession record will not populate correctly in a spawned resource. However, any manual text formatting input in the Accessions module **will** carry over if the Accession record is spawned into a resource. With that said, there are some formatting speedbumps to consider when spawning a resource. Please see the [Text Formatting Considerations](#) subsection of the Spawning a Resource section of this documentation for more information.
- ASpace is **case-sensitive!** Make sure you are using consistent capitalization to avoid errors. You can follow the lead of the examples we’ve provided in this documentation.
- Use your best judgment. You are the expert for your repository.

Creating a New Accession

Accession records in ArchivesSpace are less autonomous than Resources. We strive to keep Resources as similarly described as possible to adhere to DACS standards and achieve an equitable level of discoverability based on our ArcLight customization. There are no national standards for creating accession records, and ArchivesSpace Accession records are not published for an end user. Accessioning practices also differ significantly between Indiana University repositories.

Basic Information

First, navigate to the correct repository for the collection. From the Home screen, click Accession under the Create dropdown menu.



Title: A title is not required, but your repository may have its own requirements. Please consult with your supervisor or repository manager for title information. Note: The identifier will display as an accession record's title if a title is not provided.

***Identifier:** Identifier is the only required field for an accession record. Please follow your repository's standard for creating an identifier.

Accession Date: The accession date is automatically generated when an accession record is created.

The remaining fields in the Basic Information section can be filled in based on your repository's specifications. We do not have recommendations for how much or how little you include in an accession record, but it is advisable to follow the precedent set by your institution.

Dates Through Rights Statements

The following sections between Dates and Rights Statements in the accession form can follow the same recommendations as written in the [Basic ArchivesSpace Documentation](#).

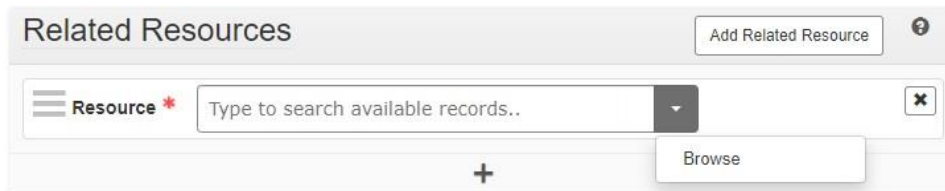
- Languages
- Dates
- Extents
- Agent Links
- Subjects
- External Documents

Note: Date types outside of Accession Date and the standard date labels (e.g. Appraisal Date, Processed Date) may be in the Events module. Please see the [Events](#) section of this documentation for more information.

Related Records

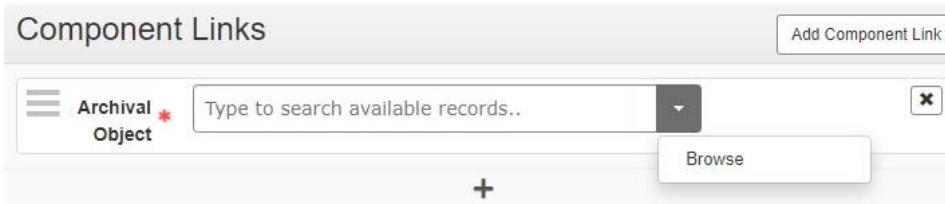
Accession records can be linked to other resources, accessions, and components. Please use the following instructions to link an accession record to a separate archival object:

Related Resources



1. With an accession record open in edit mode, navigate down to the Related Resources module
2. Begin typing the title of the resource you are wanting to link to the accession record OR click the down arrow and then Browse to find the desired resource
3. Click the blue Save Accession button on the left side of the screen (Note: You can link to multiple resources)

Component Links



1. Follow the same steps listed in the [Related Resources](#) section, but in the Component Links module.

Related Accessions

The screenshot shows the 'Related Accessions' module interface. At the top right is a button labeled 'Add Related Accession'. Below it is a dropdown menu for 'Relationship type' with a close button (X) to its right. The dropdown menu is open, showing two options: '"Part of" Relationship' and 'Sibling Relationship'.

1. With an accession record open in edit mode, navigate down to the Related Accessions module
2. **Relationship type:** Select based on the relationship between the accession records that you are linking. The next fields will be the same regardless of your selection.

The screenshot shows the 'Related Accessions' module interface with the 'Relationship type' dropdown set to 'Sibling Relationship'. Below the dropdown is a section titled 'Sibling Relationship' with three fields: 'This Accession' (set to 'Is Sibling of'), 'Accession' (a search field with the placeholder 'Type to search available records..'), and 'Relator Type' (a dropdown menu with options '"Bound With" relationship', '"Bound With" relationship', and 'Is Sibling').

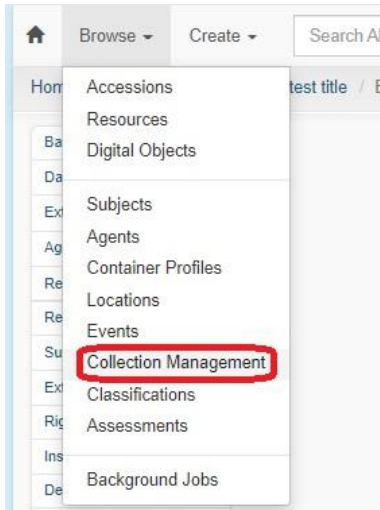
3. Fill in the following fields:
 - a. **This Accession:** This field is fixed based on the relationship type you have chosen
 - b. **Accession:** Begin typing the title of the accession record you are wanting to link to the new accession record OR click the down arrow and then Browse to find the desired accession record
 - c. **Relator type:** Select "Bound With" Relationship or Is Sibling depending on the relationship between the two accession records.
4. Click the Blue Save Accession Button on the left side of the screen

Collection Management

The Collection Management module allows users to record processing information related to an accession. Neither the Collection Management module nor any of its fields are required but filling them in can be helpful to plan future processing projects. Users can browse Collection Management entries to quickly gather information about processing priority, processing status, and the estimated total number of processing hours.

Please follow these steps to browse archival objects with collection management information.

1. Save an accession record with Collection Management fields filled in.
2. Select Collection Management from the Browse dropdown menu on the top left corner of the screen.



3. You will be redirected to results of all archival objects with collection management information.

Collection Management ?

Showing 1 - 1 of 1 Results, Sort by:

Title	Record Type	Processing Priority	Processing Status	Total Hours		
Custom test title	Accession	Medium	In progress	3	Created by brijmcla 2022-11-03 17:12:47 -0400 Last Modified by brijmcla 2022-11-03 17:12:47 -0400	View

4. From here, you can sort archival objects by Title, Record Type, Processing Priority, Processing Status, and/or Total Hours.

Deaccessions

A deaccession record describes information about materials that may have been separated, discarded, returned to a donor, or otherwise removed from an accession or resource record. A deaccession record created before processing will be linked to the accession record.

Deaccessions

Add Deaccession ?

Portion * Whole

Description *

Reason

Disposition

Notification Given?

Deaccession Date

Label * Deaccession

Expression * Describe the date or date range

Type *

Select a Type to enter normalized date or date range

Certainty

Era

Calendar

Extents Add Extent

Deaccession Fields

***Portion (required):** Choose Part if you are deaccessioning part of a given accession. Choose whole if you are deaccessioning all of a given accession.

***Description (required):** Describe the materials being deaccessioned.

Reason (recommended): Explain the reason for deaccessioning the materials described.

Disposition (recommended): Describe what was done with the materials described.

Notice (recommended): Check the checkbox if a notification of the deaccession was given. If no notification was given, leave the box unchecked.

Deaccession Dates

***Label (required):** Select Deaccession

***Type (required):** Select Single, Inclusive Dates, or Bulk Dates

The rest of the deaccession date module follows the same structure as the date module in all ArchivesSpace record types. Please refer to the Dates section (page 6) of the [Basic ArchivesSpace documentation](#) for guidance.

Deaccession Extents

It is recommended to add an extent to a deaccession record. The deaccession extents module follows the same structure as the Extents module in all ArchivesSpace record types. Please refer to the Extents section (page 7) of the [Basic ArchivesSpace documentation](#) for guidance.

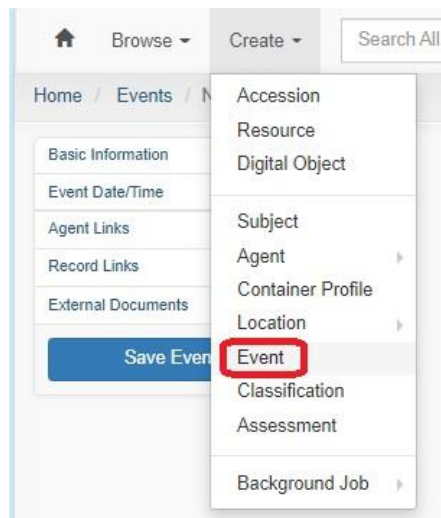
Events

An event record describes an action involving a selected archival object and an agent. Events represent a specific action that one or more agents undertook in relation to one or more archival objects at a specific date and time (or in a range of dates and times). E.g. Date Processed, Date Appraised.

Event records can help fill in gaps in an Accession record.

To create an Event in ArchivesSpace, please use the following steps:

1. Select Event from the Create Menu (**Note:** This can be done in a different tab and linked to an accession record in another tab without refreshing the accession record.) You will then be directed to a New Event form.



2. **Type:** Select the appropriate event type. If none of the event types work, please e-mail dcshelp@indiana.edu and we can add them to the controlled value list.
3. One date is required for an event. The Event Date/Time module looks slightly different than the Dates module from other archival object forms. However, you can add information following the same guidelines from the Dates section of the [Basic ArchivesSpace Documentation](#). The only added field is **Date/Time specifier**. Select Date Subrecord for Date/Time Specifier unless you wish to use a UTC timestamp.

4. Select the appropriate Event Date/Time label.
5. Select the appropriate Event Date/Time type
6. Since an agent is required to create an event, the Agent Links section is required for events. Select the appropriate agent role. If none of the agent roles work, please e-mail dcshelp@indiana.edu and we can add to the controlled value list.
 - a. **Note:** The agent will likely be you. Every ArchivesSpace user has their own agent record. To link to your agent record, type your username (IU e-mail minus @iu.edu) and click on your agent record.
7. If the agent already exists in ArchivesSpace, you can begin typing their name and choose from the autofill options. If the agent does not already exist in ArchivesSpace, open a new tab and follow the instructions in the Creating Agents section of the [Basic ArchivesSpace Documentation](#). **Note:** The basic documentation will refer to resource records, but the same steps can be followed to create agents for all archival objects.
8. The Record Links section includes the information that will link the event to an archival object. First select the appropriate record role.
9. Search for the archival object the event will be linking to by either typing the name and selecting from the autofill menu or clicking the down arrow to the right of the text box to browse for archival objects.
10. Click Save Event

Spawning a Resource Record

Spawning a resource record from an existing accessions record can save a lot of time a user may have spent copying and pasting information from an accession record into a resource record. The spawning function can be particularly helpful if an accession record is particularly robust.

Data in the following modules will transfer with no changes when spawning a Resource:

- Dates
- Extents
- Agents
- Subjects
- Rights Statement

In addition to the modules listed above, the following fields from the Basic Information module transfer when spawning a Resource (Please note that some field names change):

Accession Record	Resource Record
Title	Title
Content Description	Scope and Contents Note
Condition Description	Physical Description

Please use the following steps to spawn a resource record from an existing accession record.

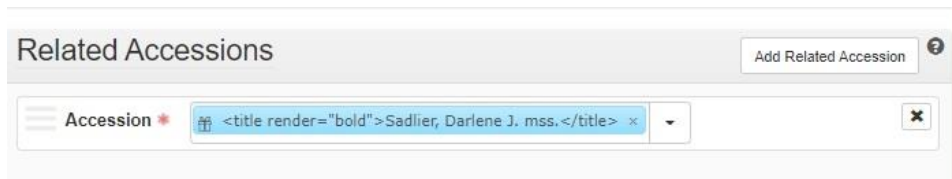
1. Navigate to an accession record.
2. Click Resource from the Spawn menu in the top right corner of the accession record.



3. You will be redirected to a partially filled in resource form. As noted above, not all fields will carry over when a resource is spawned from an accession record. **Note:** Nothing will be saved until you fill in the remaining required fields and click Save. Please see the [Basic ArchivesSpace Documentation](#) for information on filling in fields in a resource record.
4. You have successfully spawned a resource record!

Text Formatting Considerations

As mentioned in the General Tips section of this documentation, some text formatting is possible in accession records. Unfortunately, text formatting doesn't always play nice when you spawn an accession or resource record from an accession record. For example, hand-encoding an accession record title `<title render="bold">Sadlier, Darlene J. mss.</title>` will effectively bold the title. However, if a resource or accession record is spawned from the accession record with a bolded title, it will display like the following screenshot.



The formatting comes through as text instead of bolding the title in the accession record link. While this isn't *wrong*, it isn't very attractive. For that reason, we encourage you to not include text formatting in an accession record title.

Spawning an Accession Record

Spawning an accession record from an existing accession record can be useful if there are multiple accessions for items that will be in one collection.

All fields from Basic Information, Dates, Extents, Subjects, and Agents modules carry over from the first accession record apart from the identifier. The date is automatically generated, as well. The remaining modules (e.g. Events, Collection Management) are record specific, and do not carry over when spawned.

The same process outlined in the [Spawning a Resource Record](#) section of this documentation can be followed to spawn an accession record from an existing accession record. The only difference is that you will need to select Accession instead of Resource from the Spawn dropdown menu.

Appendix

The following screenshots represent dummy sample accession records for your reference. If you would like to view them in ArchivesSpace, they will be in the Training Repository.

Note: None of these accession records or the data within them are real.

Example 1

Edit Add Event ▾ Spawn ▾ Transfer ▾ More ▾ Suppress Delete

Appendix1 (do not delete) Accession

Basic Information

Identifier	Appendix1 (do not delete)
Accession Date	2023-04-07
Publish?	False
Content Description	1 statue; Bronze bust of Jane Doe. 17" high, on a 5 1/2" black marble base. Bottom of base was chipped when received from the F.B.I. in June 1992.
Disposition	Transferred to the Office of the Campus Curator of Art on March 11, 2022.
Provenance	Received 1982 March 24, from IU Foundation (to be held in Archives for Heritage Committee's Sub-Committee on Campus Beauty), Showalter House
Acquisition Type	Gift
Restrictions Apply?	False
Access Restrictions?	False
Use Restrictions?	False

Created by brijmcla 2023-04-07 16:52:52 -0400 | Last Modified by brijmcla 2023-04-07 16:39:32 -0400 | URI: /repositories/28/accessions/8287



Dates

▶	Creation	2022-08-17
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Extents

▶	2 Cubic Feet	1 statue
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Agent Links

Role	Relator	Agent
Creator		 brijmcla
Subject		 Doe, Jane

Example 2

Edit	Add Event ▾	Spawn ▾	Transfer ▾	More ▾	Suppress	Delete
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Appendix2 (do not delete) Accession

Basic Information

Identifier	Appendix2 (do not delete)
Accession Date	2022-12-28
Publish?	True
Content Description	49 items in 1 legal dc; Dance cards
Condition Description	Fair to good; items have been sleeved.
Disposition	Processed into ABC123
Provenance	Received approximately 1993 May 19, from Lady Gaga, 1310 Not-real-city, state zip code; Deed of gift: n; paperwork in gift file under "Gaga, Lady"
General Note	Items were sent to I.U. Alumni Affairs by Elton John, hospice volunteer and friend of Myra's. Items then came to the Archives Provisional MARC created 22 Jan. 2004; call #: Accn. Accession2 ; title control #: a1234567; Creator: John, Elton
Restrictions Apply?	False
Access Restrictions?	False
Use Restrictions?	False

Created by brijmola 2023-04-07 16:07:41 -0400 | Last Modified by brijmola 2023-04-07 16:12:08 -0400 | URI: /repositories/28/accessions/8288

Dates

▶	Creation	1922 – 2000
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Extents

▶	.4 Cubic Feet	49 items in 1 legal dc
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Agent Links

Role	Relator	Agent	
Creator	Donor	John, Elton (1947-03-25)	
Subject		Gaga Lady (1986-03-20)	

Related Resources

Identifier	Title
ABC123	Test Resource

Collection Management

Processing Priority: Low	
Processors	Bri McLaughlin
Rights determined?	False
Processing Priority	Low
Processing Status	Completed

Assessments

[Go to Search Results](#)

Example 3

Edit	Add Event ▾	Spawn ▾	Transfer ▾	More ▾	Suppress	Delete
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Appendix3 (do not delete) Accession

Basic Information

Identifier	Appendix3 (do not delete)
Accession Date	2010-02-09
Publish?	False
Content Description	Postcards, publications
Condition Description	Good
Disposition	See disposition in parenthesis next to each item
Inventory	1) Auditorium program for the Mar. 22, 1959 production of "PARSIFAL". (pubs) 2) Brochure about the School of Music's summer 1959 European Music Festivals Tour. (pubs) 3) Auditorium Series program for the Apr. 16, 1942 appearance of William Lyon Phelps. (pubs)
Provenance	Received 2004 June 01, from P. Sherman, 42 Wallaby Way, Sydney, Australia
General Note	These items were dropped off at the Archives by P. Sherman. These were items that had ended up in his office before his retirement. They were boxed up with what was thought to be his personal items when he retired. He recently started sorting through some of these boxes, and came across these items.
Resource Type	Collection
Restrictions Apply?	False
Access Restrictions?	False
Use Restrictions?	False

Created by brijmcla 2023-04-07 16:27:17 -0400 | Last Modified by brijmcla 2023-04-07 16:29:02 -0400 | URI: /repositories/28/accessions/8289

CONTINUED ON NEXT PAGE


Extents

> .1 Cubic Feet

Agent Links

Role	Relator	Agent	
Creator		 Sherman, P.	

Related Accessions

Relator	Relator Type	Accession
Sibling of	translation missing: accession_sibling_relationship.is_sibling	 Appendix2 (do not delete)

Subjects

Authority ID https://ccn.loc.gov/sh85028396	Subject Heading  College theater
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Collection Management

> Processing Priority: Medium

Events

Type	Outcome	Agent Links	Record Links		
Copyright Transfer		Authorizer: Sherman, P.	Outcome: Appendix3 (do not delete)	Created by brijmola 2023-04-07 16:32:01 -0400 Last Modified by brijmola 2023-04-07 16:32:01 -0400	View Edit

Assessments

[Go to Search Results](#)