

DATA ENTRY AND EDITING SPECIFICATIONS

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Overview

The Data Entry and Editing subgroup focused on inefficient or missing functionality in the Staff User Interface, with particular focus on the activities surrounding working in a Resource record, since for many institutions this represents the lion's share of time. After reviewing suggestions from the initial survey and JIRA tickets, it became clear that many of the issues sprang from a lack of functionality to bulk edit. Via a virtual edit/brainstorm session, the subgroup came up with an entirely new approach to bulk editing, detailed in section I.A. below. In case this solution represents too large a leap, the group retained the piecemeal solutions as well in section I.B. Smaller changes which would yield large gains in efficiency follow in the Data Entry, Top Containers, and Agent/Subject/Event Records sections.

I. Editing Resource Records

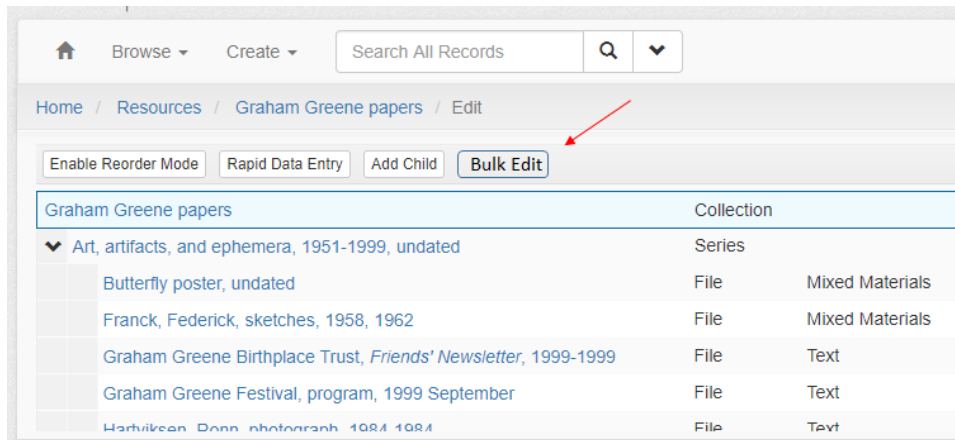
As the team worked on desired editing functionality, it became clear that adding an entirely new functionality, akin to the Rapid Data Entry workflow, would solve multiple needs. In case the new functionality is too pie-in-the-sky for immediate development, we also laid out specifications for smaller individual fixes as an alternative in section B.

A. Comprehensive Bulk Edit Solution: Rapid Edit Mode

This new functionality opens selected archival objects in a pre-populated table on a visually RDE-like screen. The spreadsheet-like view provides similar functionality to RDE including the benefit of quickly being able to view and edit multiple objects, comparing values, ensuring consistency, cutting down on constant saving/refreshing, and bulk-assigning the same values to the same fields. In addition to this new screen, the second prong of Rapid Edit Mode enhances Reorder Mode by accommodating bulk delete/reorder of archival objects within the tree view.

How it would be triggered/enabled:

Via a “Bulk edit” button within resource record,



Which would have its own drop down with its own set of options, similar to the Bulk Operations in Manage Top Containers.



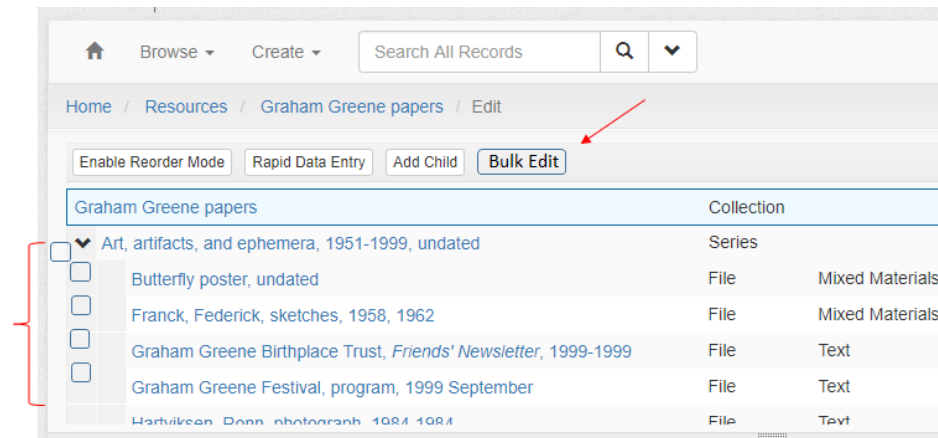
Depending on what you click on, it could either

a) “Edit fields in multiple objects” (or “Edit”) would enter the Rapid Edit Mode (REM) grid layout which would mimic the Rapid Data Entry rows-and-columns. It could be triggered at any level of the hierarchy. For example, if the user enters this mode while at the collection level, ALL components show up in the REM table, if a series is highlighted in the tree view, that series and associated children show up and so on and so forth. This would accommodate edits reflecting physical arrangement (bulk changing box or folder numbers), intellectual arrangement (bulk changing the level for multiple series or subseries), as well as changes necessitated by user error or changing local standards (fixing

a string of dates or titles that involve a sequence).

The screenshot shows a data entry interface with a table of columns: Level of Descriptive, Other Level, Publish, Title, Component Unique, Language, Expression, Date Type, and Label. A red box highlights the 'Level of Descriptive' column. Below the table is an 'Add Row' button.

b) “Delete/reorder archival objects” (or “Delete/reorder”) would activate a radio button layout in the tree view of the resource. Clicking the button by a file-level archival object will select that file only. Clicking any “parent” archival object will automatically select all of its children. The radio button at collection level entry in hierarchy will “select all”. After selections are made, the user would click a newly generated delete button, with a pop up message to confirm the delete. Or the user could click “Enable Reorder Mode” to reorder the selected lines in the tree, as individual archival objects can be currently when “Reorder Mode” is activated. This would accommodate edits to reflect changes in intellectual arrangement (moving a group of file-level entries into a new series, etc.) Permissions note: permissions should be split so that lower-level users can bulk reorder but not bulk delete.



What it would look like/layout:

For bulk delete/move option see illustration above.

Rapid Edit Mode would open a layout similar to the current RDE screen, with columns representing fields and rows representing archival objects. The default view would include all fields containing data. Templates could be built at the local level to show only the fields needed for common edits (i.e., a template intended for modifying the instances assigned to a set of file-level archival objects could show Instance Type, Top Container, and Child Container but hide most other fields.)

B. Individual-Fix Approach to Bulk Edits

1. Level of Description Bulk Edit

There should be a bulk edit feature which includes bulk changing the Level of Description (especially helpful for imported records which wacky hierarchies).

2. Container Instance Bulk Edit

Capability to batch change assigned instances if box shifts occur instead of having to change impacted archival objects' instances one at a time. Being able to change the Top Container for a set of shifted materials would be a good minimum improvement. Being also able to bulk change "Child" container information (Folder or Volume number) in a spreadsheet-style interface which allowed quick entry of a sequence of file numbers would be optimal.

3. Bulk Delete

There should be an ability to bulk delete archival objects, with selection either by highlighting or radio buttons for each Archival Object that become visible when "Enable Reorder Mode" is active, followed by a Delete button becoming visible triggered by the selection.

C. Existing edit functionality improvements

1. Selecting multiple items in reorder mode

Issues:

There needs to be hovering directions over the "Reorder mode" button which indicates how to select multiple rows to reorder.

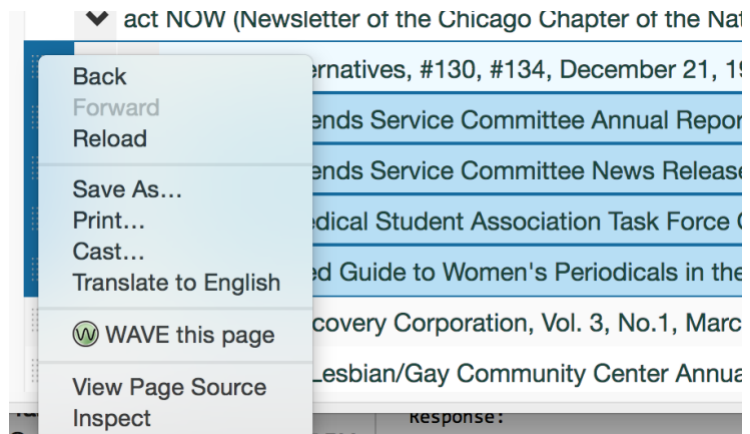
Currently, this information is only available in the user manual.

There needs to be a way to bulk select a large consecutive row of archival objects, not just clicking each individual line. Ideally, it would be triggered by click+shift. Current behavior for Macs in Reorder Mode: click+shift in an attempt to highlight multiple lines triggers opening a new browser page (no expected or wanted!).

Click+command = opening a new browser tab (also not desired).

Click+option downloads an html file of the raw page (what?).

Click+control automatically triggers a pop up menu each time, obscuring the numbering of the reordered components. Ideally, a different command for Macs should be used to individually select lines, such as Click+fn and enable click+shift to highlight consecutive lines.



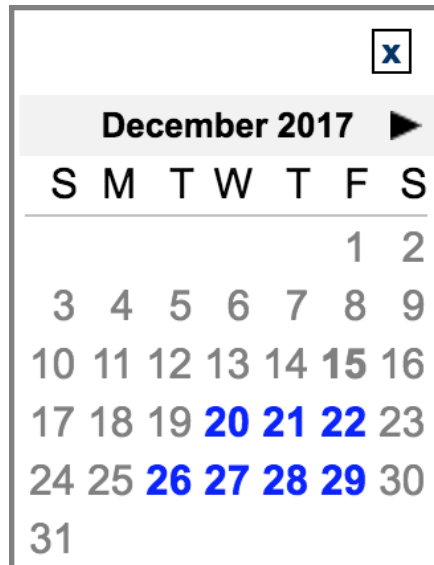
2. Responsiveness

Double-clicking anywhere on a component (not only on the title) should open the record in “edit” mode (as long as those permissions are on). For example, opening a line of search, opening an archival object within an inventory, and opening a Top Container from a list. It should also be possible to select components in Reorder Mode by clicking anywhere on the line, not only on the very faint textured area to the left. This is a big accessibility issue.

	Miscellaneous Letters, January 1File	Mixed Materials	Box: 8 [M0102010
	Miscellaneous Letters, July 19...File	Mixed Materials	Box: 8 [M0102010

3. Multiple Dates issue

Currently, multiple dates aren't being handled well. They often don't show up in the Resource tree view, but most importantly aren't showing up in the public interface. They also need to have the labels assigned visible, such as if they are bulk dates or marked as “approximate.” Additionally, it would be helpful if the date calendar had an “X” to clear the contents. Even though it's possible to delete the contents of the calendar, when using the calendar solely and not manually entering dates, it's not easily apparent that the field can be cleared.



4. Refining Merge Function

Issue: it's not obvious which term/Subject/Agent is being subsumed into what. Even though the user manual describes: "choose the controlled value with which you would like the merge the unwanted variant value," there needs to at least be helper text within the program to reinforce understanding of action. Current view of the Merge table: too vague. It is implied that the linked records associated with Value 1 goes into Value 2, and all of Value 2's fields are applied.

Merge Value X

Name *

resource_finding_aid_description_rules

Value *

Describing Archives: A Content Standard

Merge Into *

Describing Archives: A Content Standard

Merge Value

Cancel

This is doubly confusing because of the apparent reverse capability within agents and subjects. When a user selects Merge in Agents, the select Agent 2 is subsumed into Agent 1. Current view of Merge function for Agents:

Select below agents to merge into Brown, Jerry,
1938-

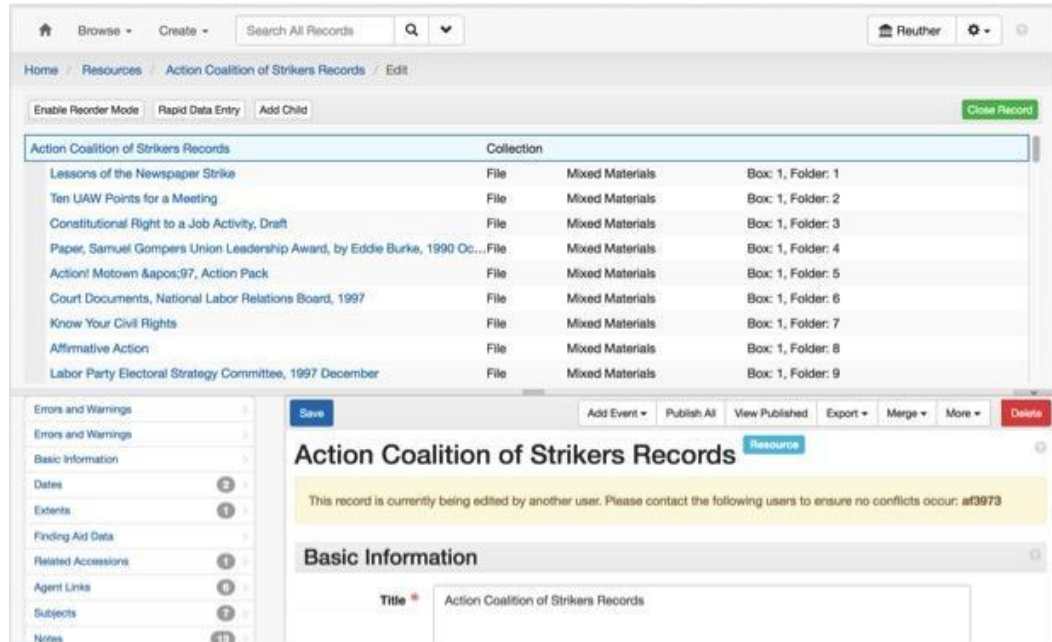
Agents

Issue scenario: I'd like to be able to control which fields are integrated. For example, in data clean-up, I'd like to integrate the Biographical/Historical note in Agent 1 with the rest of the fields in Agent 2. Ideally, I'd like to have a side-by-side view of both records with radio boxes on data fields. The preset settings would default to the usual subsuming record, but the user could check boxes in the other field they wish to retain instead.

5. When Multiple Users Edit the Same Resource

Users have requested that the alert for when multiple users are editing the same resource should be more visually apparent, possibly as a click-through pop-up window. There also needs to be greater clarification about whether it is possible for multiple users to edit different parts of the same resource. It currently sounds like the 1st saving user locks the entire Resource, however, there are situations which make locking the *component* as opposed to the entire Resource more desirable. For example, this would be helpful for student(s) who are entering the inventory data while the archivist edits the collection-level finding aid description, or archives classes that are simultaneously entering data for multiple series of the same Resource as part of a group processing project. This may be worth additional testing to confirm the behavior of the most current program version.

Current alert (from version 2.1.2):



Some users have expressed a desire to have users locked out of records already open in edit mode, so that no two people can be in edit mode for the same record at once, which would eliminate the need for the alert and also eliminate the possibility of overwriting data. The following suggestion is made for locking, whether it be locking a whole resource record, or locking only the components being edited:

If a staff user attempts to open in edit mode a record that is already open in edit mode, they would see a screen like that below (screenshot taken from homegrown system at WVU) instead of being able to open the record in edit mode.

Data Entry

[DOCUMENTATION](#)

Object is locked by another User

Form Name: A&M Guide

Object IDNO:

Locked by: jcmatters

Locked On: Tue, Dec 19 2017 13:45

This object is locked for editing. If you are the user that locked this file it is possible that you have it open in another browser window, or closed the browser window where you were previously working on this object without clearing your lock.

If another user is listed as the locking user, please check with them before unlocking this object to edit it.

If you unlock this object the previous opened version will not be able to be submitted.

[Unlock this object](#)

The lock screen should explain that the record is locked for editing, which user has it locked for editing, have a hyperlink option to open the record in view mode, and (if necessary) have a

hyperlink option to unlock the record (FYI, that option is included in the system screenshot above because a user who saves and closes a record without unlocking it will inadvertently prevent others from using it even if they are logged out of their computer—if the ASpace system will not have that extra layer of locking, then the unlock option shouldn't be necessary).

Unresolved issue with the above lock-screen solution: how will the user know when the locked-for-editing record has been saved by the other user and is ready to be opened in edit mode by the user seeing the lock screen?

6. When Users Edit Related Records

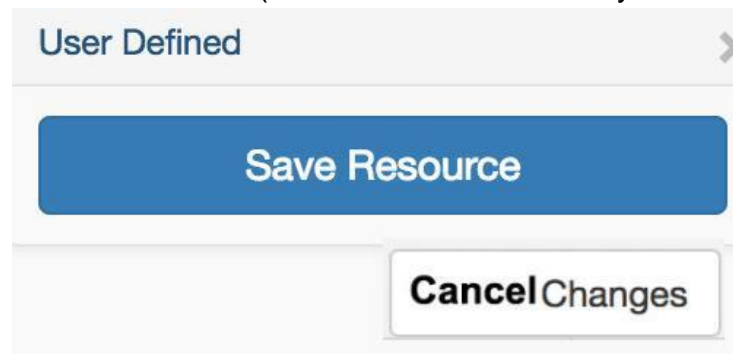
Issue: Sometimes I have an accession record and its related resource record open in edit mode in two separate tabs. If I make a change to the accession record and save it, the following message pops up in red at the top of the related resource record's page: "This record has been updated by another user. Please refresh the page to access the latest version." This message happens even if I haven't made any changes to the resource record--it seems to happen just because I have a related record open in edit mode. I don't understand why this warning needs to happen, and I also don't understand why I can't edit a related resource and accession at the same time. I don't want to lose edits I make in one record if I tab over to the related record to edit and save.

Possible solution: If the functionality of the error message is not actually necessary from a database standpoint, we recommend removing the error message and allowing related accession and resource records to be edited simultaneously without interfering with people's ability to save their edits. However, if the error message is critical/necessary from a database standpoint, then the person who opens the second record in edit mode (be it an accession record related to an already-open-in-edit-mode resource record, or vice versa) should either be blocked from editing until the related record is no longer being edited, or should be warned with an eye-catching alert upon opening the related record in edit mode, so that the person doesn't make changes that won't get saved when he/she has to refresh because the open-first related record is saved.

II. Simple Data Entry in Resource Records

A. Save

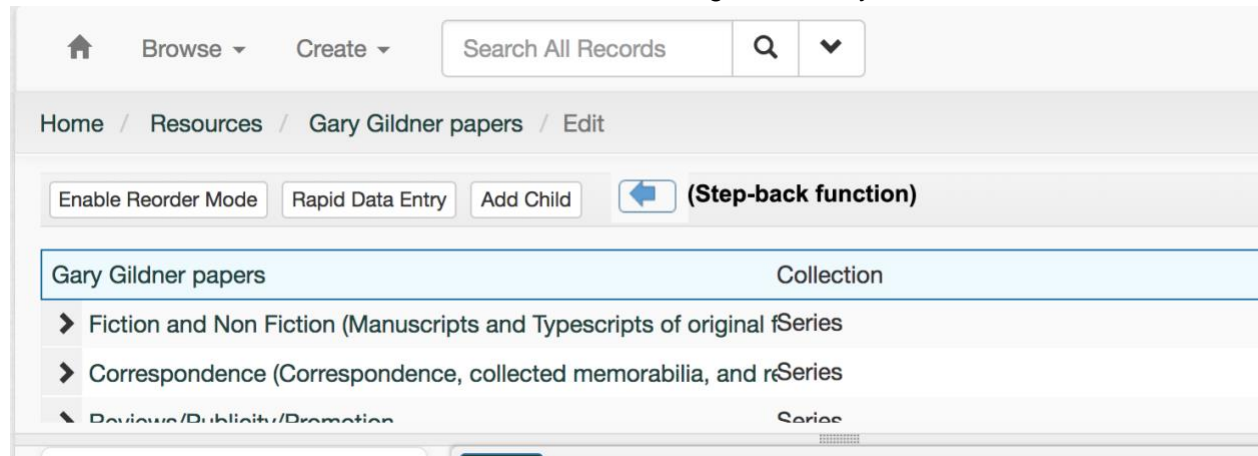
1. Once an archival object has been deleted or saved, the record should refresh with the cursor in same position in the hierarchy it was in prior to the action, not collapse everything and start again at the top; and the record should stay in Edit mode, not default to View mode after a deletion.
2. A save should not be required by the system every time an edit is made to an archival object. Currently when adding notes you can move on to the next note without saving the first one, then save the record when done; similar default behavior when editing archival objects would be preferable.
3. During the process of saving, prevent users from editing records and thus losing their edits when the updates reload.
4. Autosave each row in RDE as a background function (an incremental saving function which doesn't allow for the lag time of the traditional saving approach)
5. Autosave at set time intervals while working in a resource.
6. Bring back the feature where the Save button in the left navigation green when the record has been modified. (This reverses the current behavior of the save button color. When something is in edit mode but hasn't been edited and doesn't need to be saved, the button would be greyed out.)
7. Add a "Cancel Changes" (see [Browsing, Customization, and Functionality doc](#) on changing the term "Revert Changes") button to the side bar near the Save button (but don't make it too easy to accidentally click instead!)



B. Step-back

When moving archival objects, after batch creating locations, and other significant functions, it would be helpful to have a step-back function. It should

have a shortcut of Control/Command + Z, plus a button toward the top of the screen with the universal back arrow like in Word/Google docs/any browser.



The button should either grey out any time the user is not performing a task that can be undone, or (more preferable) it could pop up only within the screen for tasks that could be undone.

C. Add children/siblings

As requested in JIRA AR-1718, adding “children” and “siblings” should insert them in the line below the highlighted item in the hierarchy. This saves a step of having to move a new archival object that has defaulted to the bottom of the list.

D. Option to Control “Language” elements

The Language of Description field under Finding Aid Data should be available as drop-down menu with authorized language headings just like the Language field in the Basic Information subrecord. However, since there was some interest voiced by the user community in being able to maintain the free text field option for repository-specific language (such as “Finding aid written in English”), both the free-text and controlled value list options should be available and customizable by Repository Manager permissions.

E. Resize Notes “Content” subfields

It is difficult to add or edit long notes within the limited size of the Content subfield. This should be a responsive box that can be dragged from one corner to make it

larger. It is especially needed in the following longer notes: Abstract, Scope & Contents, Biography, General, Arrangement.

F. Copy/clone elements

1. The ability to clone/copy an entire resource component record (within the same resource) e.g., Top container information would be copied.
2. For the Biography note field, the ability to select a biography found in one or more agent records and import into the Resource/Digital Object record. This will provide a base text that can be tweaked to suit the collection being described. Suggested workflow:
 - a. User opens a biography note.
 - b. Clicks on a button to import note if desired (i.e. user can still just type a note if they would rather)
 - c. Autopopulate screen uses typeahead search similar to when you link an existing agent record where you type in the heading for the record with the biography information you want to pull in.
 - d. Biography note(s) from agent record (if there is one) pops into the biography note BUT just like resource records spawned from accession records, you can edit the information any way you want without it affecting the information in the agent record.

Note: Some users may also want the option to link a biography note to the master Agent record, which then automatically updates to all linked records. We defer to the determination of the Agent refactoring group and/or future projects.

III. Rapid Data Entry

A. Add/Reorder Rows

1. The add/delete rows icons should be moved to the left side for improved usability. (As described in [AR-1635](#))

Basic Information	
* Level of Descriptive	Title
File	title
File	title 2
File	title 3

Add Row

2. A button could be added above the add/delete icons on the left to enable reordering of rows in the RDE screen. Once activated it would function just like reordering in a resource record.

Enable Reorder Mode

B. Manage Templates

Replace “Remove Templates” with “Manage Templates”. This view would have the capability both to select and delete templates, as well as drag to reorder them in the “Apply RDE Template” drop-down menu.

C. Add Keystroke Shortcuts

Add shortcuts to: Add row; Insert a row; and Save rows. Keyboard arrows should allow navigation between cells in RDE. Currently, it’s only possible to navigate from left to right via the Tab button. By using the arrow keys, it should be possible to navigate in either direction along a row and up and down columns. *(Also mentioned on the list of [Shortcut Keys for ASpace Commands](#) sheet)*

D. Change Validating Behavior

Current behavior: error messages appear before any data is entered in a given row, visually cluttering the data fields and confusing users.

Desired behavior: delay the automatic validation by a minute or two. It is helpful to get feedback like this to discover any potential issues, but the current immediate response is visually overwhelming and unhelpful.

Additionally, the system should automatically run a final validation once the user hits “Save”. The system would then show errors and not allow saving until they were fixed. Since the validation runs automatically, remove the redundant “Validate Rows” button to reduce visual clutter.

E. Add Container Profiles to Top Containers in RDE

As described in [AR-1875](#), the data entry for Top Containers should have the same view and functionality as Top Containers in conventional data entry, with the ability to easily assign the Container Profile, barcode, ILS

holdings, and locations.

Create Top Container

Container Profile

Container Type

Indicator *

Barcode

Barcode length for this repository: 0-255 characters

ILS Holding ID

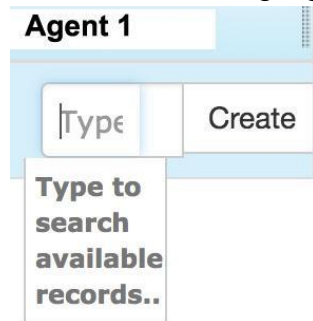
ILS Item ID

Exported to ILS Not exported

Locations

F. Add Agents/Subjects Columns

Add the ability to link agents and subjects in Rapid Data Entry (JIRA ticket [AR-1376](#)). Similar to linking Top Containers, there should be up to three columns for linking Agents and Subjects.

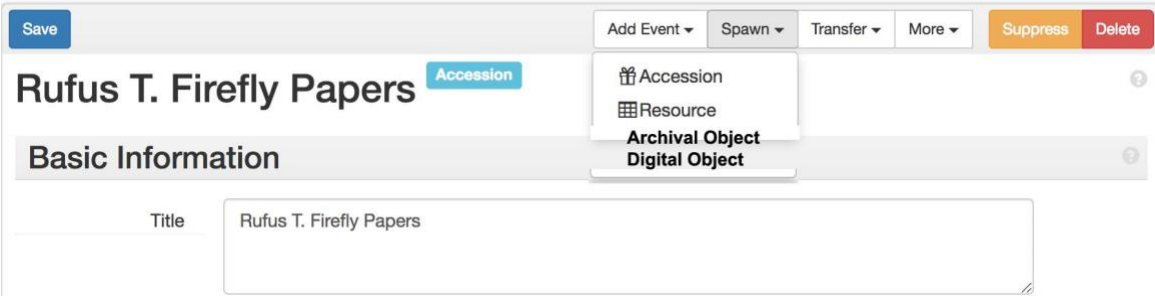


IV. Spawning Records

A. Spawn Resource Components from Accessions

As described in [AR-1057](#), as a repository that is implementing accessioning-as-processing, staff is spending a not-insignificant amount of time copying identical or nearly-identical information into both accession records and series-level resource records that are being created in order to provide immediate access to the description and materials. We would like to have a mechanism that allowed spawning of records below the collection level (e.g., spawning a series-level record from an accession) or that enabled importing selected fields of an accession record into a resource record.

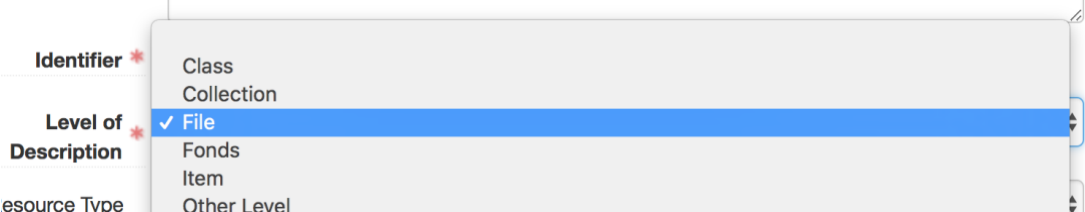
Proposed solution: Add Archival Object and Digital Object to the Spawn dropdown menu



For spawning an Archival Object (also Digital Objects), it opens a view to search for Resource



With a drop-down list of level of description

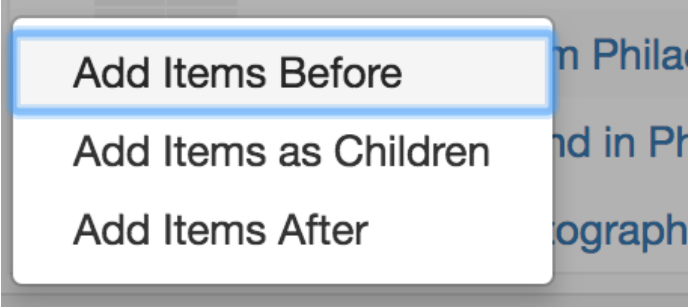


As well as a checkbox of data fields from the Accession record that should be imported (see IV. B., below about enhanced Spawn data fields).

Next, the the Tree view of the Resource opens (similar to Reorder Mode) and the user selects where they want this archival object added.



Like the existing Reorder Mode, it confirms whether the object is nested, before, or after.



B. Increase Spawn data field transfer flexibility

Add an additional step to the current Spawn process to allow the user to select via a checkbox list in a pop-up screen which fields will Spawn to the new record/component. The fields to be included should have presets (boxes that default to “checked”) that are established by a Repository Manager, and that can be adjusted by individual users on a case-by-case basis. In addition to the fields which currently spawn, this list should include: Provenance, Access Restrictions, and Use Restrictions.

C. Merge default values while spawning an accession from a resource

Add a functionality to the Spawn process, ideally in the new intermediary screen proposed above in IV.B., to “merge” with any Default Values established with Resources with the imported data from the spawning action, with a default to defer to imported data from the spawned record. For example, spawning a Resource from an Accession would now be able to incorporate Default Values of pre-established repository-specific finding aid notes, in addition to the new data brought in from the Accession record.

D. Terminology

Although SIEWG didn’t arrive at a final decision, it may be worth reexamining the terminology for Spawning, which some users described as snicker-inducing during training sessions. However, this is not a major issue.

V. Editing Events

A. Show Events when accession/resource/digital object/Agent/Subject is in Edit mode

JIRA [AR-1254](#): As a repository manager, I would like event records to be displayed and editable within the contexts in which they occur.

Treat Events as a sub-record within Accessions, Agents, Digital Object, and Resource Records ([AR-1511](#))

Presently, event records only display in the View mode for the context record in which they occur, e.g., at the bottom of an accession record, resource record, etc. to which an event record is linked.

It would be highly useful if the linked event records also displayed as an editable sub-record in the Edit mode of any context record in which an event record can be linked.

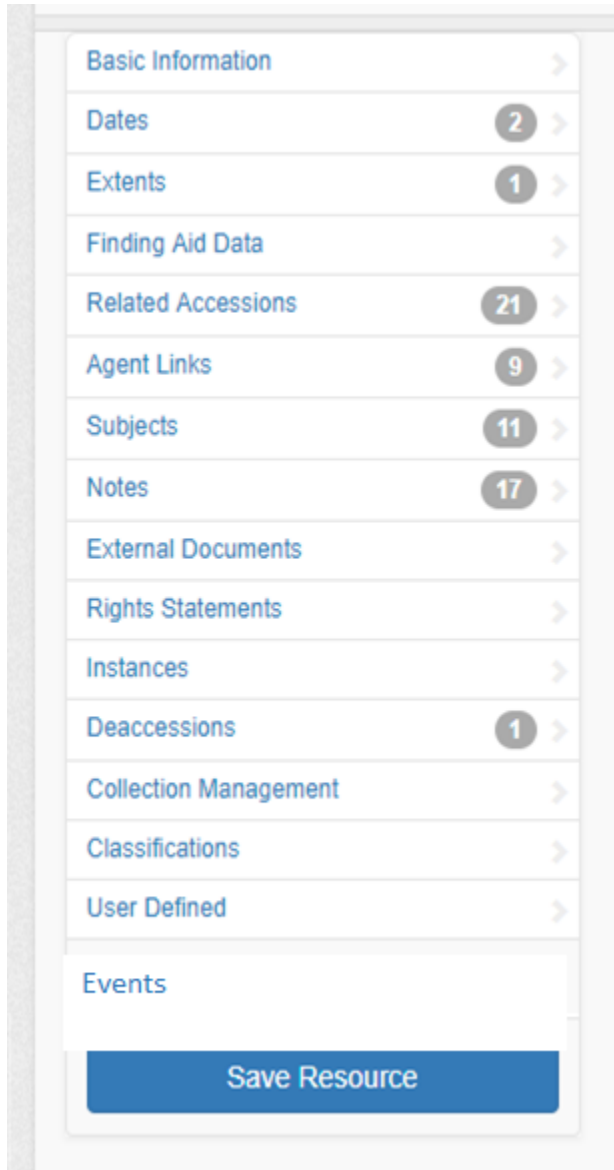
See screenshot in the section below of Events added to the record menu. Users should also have the option to remove an event record from a certain context, which would result in the event record being deleted if it was only linked to that one record.

Even if the functionality could not be added to allow an event to be edited directly in the context record, if it could be linked to in a way that showed in Edit mode, like a Top Container or Related Accession (which show up as a blue box in the context record and which require clicking “view” to open them for edits) that would be a considerable improvement.

B. Add Event from within accession/resource record

It should be possible to create an Event from within the accession or resource record on which that Event has been performed.

1. Select “Events” from the sub-record menu.



2. This would open a tab, pop-up, or screen within the record with the current functionality of Create>Event.

The screenshot shows a 'New Event' form. At the top left is a blue 'Save' button. The title 'New Event' is followed by a blue 'Event' tag. Below this is a section header 'Basic Information'. The form contains three fields: 'Type' (a dropdown menu currently showing 'Accession'), 'Outcome' (an empty dropdown menu), and 'Outcome Note' (a large text area). A question mark icon is visible in the top right corner of the 'Basic Information' section.

3. The New Event “Record Links” subfield would be pre-populated with the accession or resource from which the user requested the Event, and after the event was saved, the user would be returned to the accession/resource they were working in, with the new Event visible in the sub-records.

The screenshot shows the lower portion of the form. It features two main sections: 'Record Links' and 'External Documents'. The 'Record Links' section includes a menu icon, a 'Role' dropdown, and a 'Record' dropdown with the placeholder text 'Type to search available records..'. There are 'Add Record Link' and 'Add External Document' buttons. At the bottom, there is a blue 'Save Event +1' button and a 'Cancel' button.

C. Auto-generate Events from Collection Management actions

In the Collection Management subrecord, when setting the Processing Status, add a checkbox that will also create an Event record upon saving.

D. Jargon and Documentation

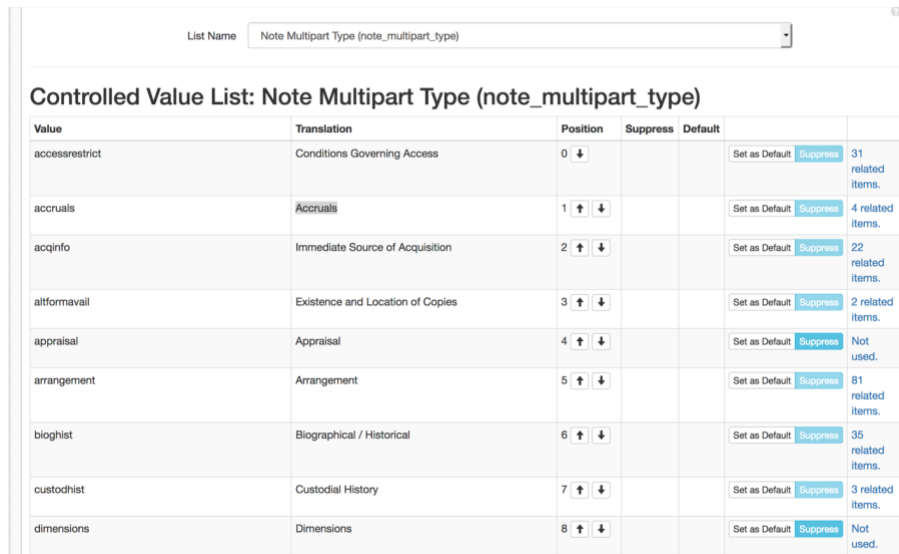
It would be helpful if there could be more documentation about how events were intended to be used and/or how people are using them. Some users reported that the jargon/logic was difficult to understand and thus implement. It's not completely obvious how Events complement areas that they overlap, such as Accessions (a partial pass for Accessions?) and elements which also covered in the Collection Management module (a Processing New can be a Fail?). It also would be helpful to expand documentation on how Events can be incorporated with Reports.

VI. Controlled Value Lists

A. Navigation

A general tenant for all list navigation could be for list navigation to be the same regardless of the type of list. This consistency would help navigating lists to become intuitive, once a user learns to navigate one type of list (e.g., component lists), the user can then easily navigate and interact with other list types (e.g., controlled value lists) in the same way.

Drag to reorder controlled value lists ([AR-1583](#))



Value	Translation	Position	Suppress	Default	
accessrestrict	Conditions Governing Access	0 ↓			Set as Default Suppress 31 related items.
accruals	Accruals	1 ↑ ↓			Set as Default Suppress 4 related items.
acqinfo	Immediate Source of Acquisition	2 ↑ ↓			Set as Default Suppress 22 related items.
altformavail	Existence and Location of Copies	3 ↑ ↓			Set as Default Suppress 2 related items.
appraisal	Appraisal	4 ↑ ↓			Set as Default Suppress Not used.
arrangement	Arrangement	5 ↑ ↓			Set as Default Suppress 81 related items.
bioghist	Biographical / Historical	6 ↑ ↓			Set as Default Suppress 35 related items.
custodhist	Custodial History	7 ↑ ↓			Set as Default Suppress 3 related items.
dimensions	Dimensions	8 ↑ ↓			Set as Default Suppress Not used.

Current look of Controlled Value list. To reorder values, user must click the arrows in the Position column.

Proposed behavior change:

Note: It should be possible to both click to highlight the line, then use the mouse to drag the highlighted selection to a new position, as well as use the keyboard arrow keys as an alternative to dragging.

List Name: Note Multipart Type (note_multipart_type)

Controlled Value List: Note Multipart Type (note_multipart_type)

Value	Translation	Position	Suppress	Default	
accessrestrict	Conditions Governing Access	0			Set as Default Suppress 31 related items.
accruals	Accruals	1			Set as Default Suppress 4 related items.
acqinfo	Immediate Source of Acquisition	2			Set as Default Suppress 4 related items.
altformavail	Existence and Location of Copies	3			Set as Default Suppress 4 related items.
appraisal	Appraisal	4			Set as Default Suppress Not used.
arrangement	Arrangement	5			Set as Default Suppress 81 related items.
bioghist	Biographical / Historical	6			Set as Default Suppress 35 related items.
custodhist	Custodial History	7			Set as Default Suppress 3 related items.
dimensions	Dimensions	8			Set as Default Suppress Not used.

Similar to proposed behavior for Component Lists, user can highlight and drag one or more values and move to a new position in the list. Remove arrows, no longer needed.

List Name: Note Multipart Type (note_multipart_type)

Controlled Value List: Note Multipart Type (note_multipart_type)

Value	Translation	Position	Suppress	Default	
accruals	Accruals	0			Set as Default Suppress 31 related items.
acqinfo	Immediate Source of Acquisition	1			Set as Default Suppress 4 related items.
altformavail	Existence and Location of Copies	2			Set as Default Suppress 4 related items.
appraisal	Appraisal	3			Set as Default Suppress 2 related items.
accessrestrict	Conditions Governing Access	4			Set as Default Suppress Not used.
arrangement	Arrangement	5			Set as Default Suppress 81 related items.
bioghist	Biographical / Historical	6			Set as Default Suppress 35 related items.
custodhist	Custodial History	7			Set as Default Suppress 3 related items.
dimensions	Dimensions	8			Set as Default Suppress Not used.

After move is complete, positions for all impacted values renumbered.

B. Merging Values

Merging controlled values is harder than it should be ([AR-933](#))

Current behavior/look of a controlled value list with option to merge:

List Name: Name Source (name_source) Create Value

Controlled Value List: Name Source (name_source)

Value	Translation	Position	Suppress	Default		
local	Local sources	0 ↓			Set as Default Suppress Merge Delete	131 related items.
nad	NAD / ARK II Name Authority Database	1 ↑ ↓			Set as Default Suppress Merge Delete	Not used.
naf	NACO Authority File	2 ↑ ↓			Set as Default Suppress Merge Delete	22 related items.
ulan	Union List of Artist Names	3 ↑ ↓			Set as Default Suppress Merge Delete	1 related item.
ingest	Unspecified ingested source	4 ↑ ↓			Set as Default Suppress Merge Delete	46 related items.
lcnaf	lcnaf	5 ↑ ↓			Set as Default Suppress Merge Delete	49 related items.
GTT	GTT	6 ↑ ↓			Set as Default Suppress Merge Delete	13 related items.
library of congress name authority file	library of congress name authority file	7 ↑ ↓			Set as Default Suppress Merge Delete	Not used.
libcn	libcn	8 ↑ ↓			Set as Default Suppress Merge Delete	1 related

Came up with two options for how to handle merging controlled value list values. One follows suggestion with how to move items in a component list into other items (i.e., moving a file into a series). The other follows how to merge one resource record into another (since there is already a merge button on this page, and this is actually merging).

1. Merge via the Component List Method

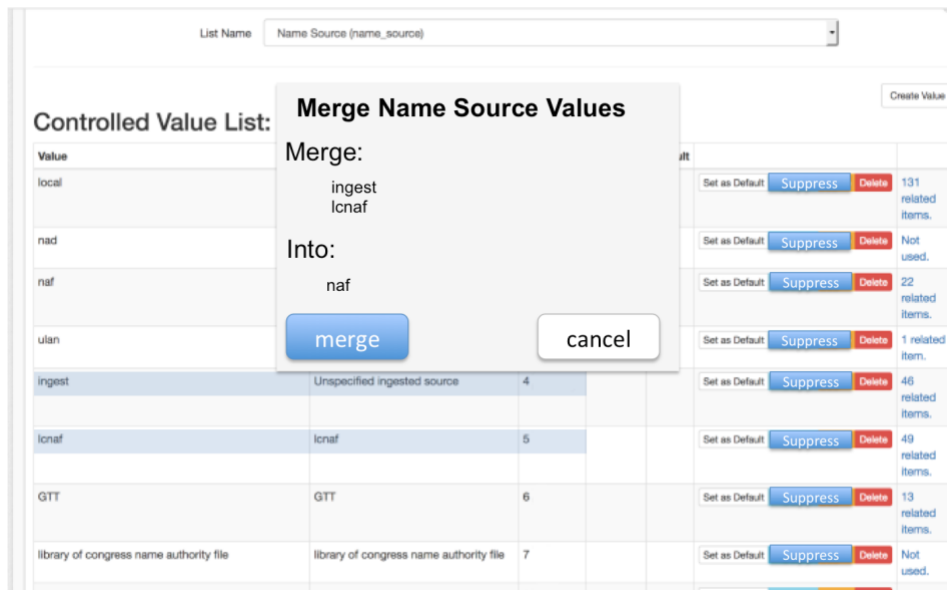
List Name: Name Source (name_source) Create Value

Controlled Value List: Name Source (name_source)

Value	Translation	Position	Suppress	Default		
local	Local sources	0			Set as Default Suppress Delete	131 related items.
nad	NAD / ARK II Name Authority Database	1			Set as Default Suppress Delete	Not used.
naf	NACO Authority File	2				ated ms.
ulan	Union List of Artist Names	3				elated m.
ingest	Unspecified ingested source	4				ated items.
lcnaf	lcnaf	5			Set as Default Suppress Delete	49 related items.
GTT	GTT	6			Set as Default Suppress Delete	13 related items.
library of congress name authority file	library of congress name authority file	7			Set as Default Suppress Delete	Not used.

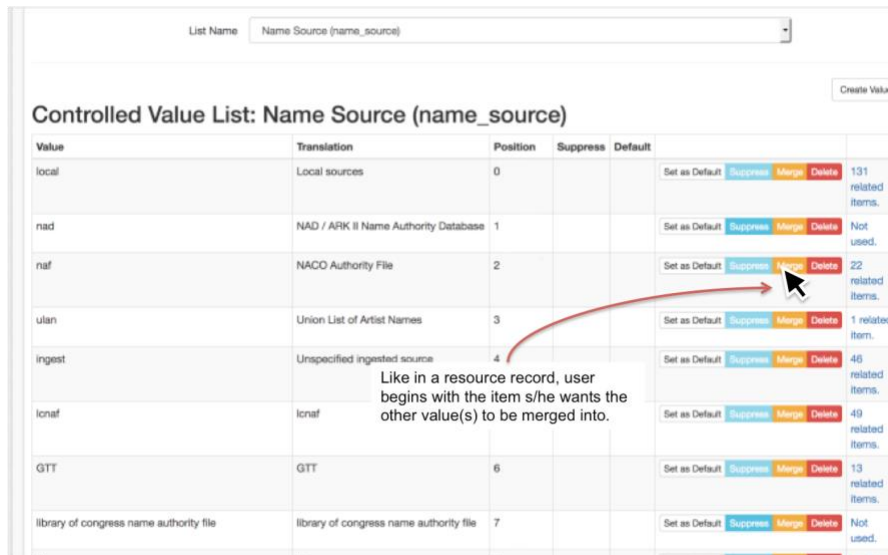
- User highlights list items (can use control/option click to highlight more than one).
- Selects item that the highlighted items will be merged into.
- Note that merge button is removed.

When user is selecting which value (s) to merge and which value to merge into. For further clarity, a checkbox could be added to each row for the user to select (rather than only highlighting rows).

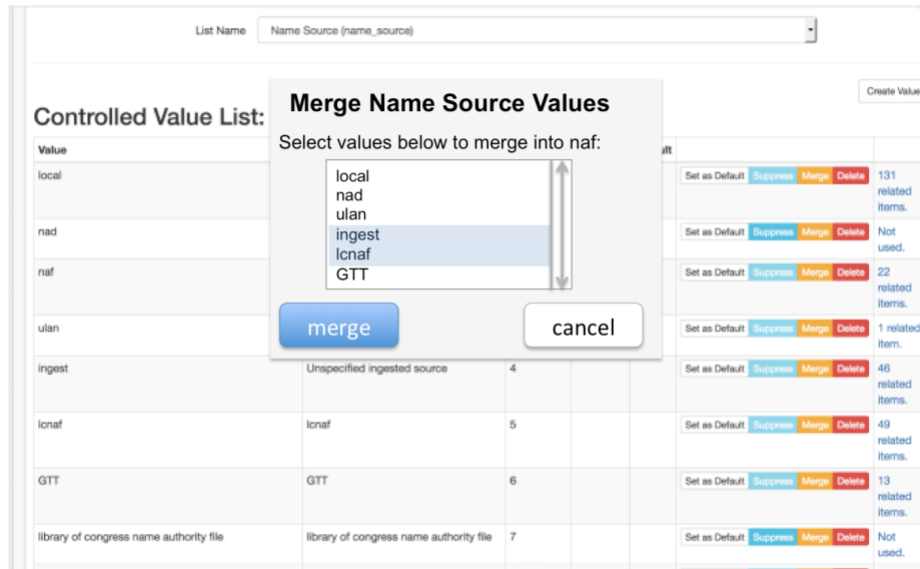


Overlay window that appears after user has selected the value to merge into. Overlay indicates which values will merge into which value.

2. Merge via the Resource Record Method



User begins by selecting the value to merge other values into.



Overlay appears, allowing user to select as many values as desired into the selected value.

VII. Linking Records throughout the System

A. Bidirectional Linking

Overall principle for linked records is that ASpace should provide full, bidirectional linking for all linked records (see [AR-928](#)). This should enable bidirectional navigation between all linked records. Note that agents and subjects have been pulled out into their own spec, [Agents and Subjects](#).

B. Classification Records

Classification Records link to Digital Object Records ([AR-1226](#))

Classification records should link to associated parent-level digital object records, mirroring current linking behavior between classification records and accession and resource records. Currently there is no capability to link digital objects to classifications.

Desired Behavior:

Basic Information

Identifier IWW_Class
Title IWW

Created by af3973 2017-09-08 15:03:27 -0400, Last Modified by af3973 2017-09-08 15:08:42 -0400

Linked Records

[Go to Search Results](#)

Showing 1 - 1 of 1 Results

Sort by: Select

Record Type	Title		
Resource	IWW Minneapolis Branch Records Accession	Created by af3973 2015-07-31 11:03:10 -0400 Last Modified by af3973 2016-11-21 14:16:33 -0500	View Edit