

# Agents and Subjects

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## Overview

Over two years ago, the Technical Advisory Council created an ad-hoc team<sup>1</sup> dedicated to expanding the Agent module to more fully support EAC-CPF, MARC Authority, and the integration with the Social Networks and Archival Context (SNAC) Cooperative. Additionally, it was proposed to reevaluate the Subjects module in similar depth. In addition to these recommendations, the SIEWG team strongly recommends a dedicated Subject Module working group, similar to the Agent working group, to address the Subject Module in greater depth. This document defers to the Agent working group's future recommendations, but contains suggestions to improve the module's usability and functionality, primarily focusing on expanding the ability to easily view and edit linked connections.

## Links of Agent records to archival objects (resource components) and digital objects component records to be displayed as part of the list of collections / materials to which an agent is related

As described in [AR-1336](#) an agent record record list should include ALL records that are explicitly linked to the agent, including any component records, digital objects, accessions, and events. Note that this does not mean that all *component* records of a linked resource or digital object are included in the linked record list, only those that are explicitly linked.

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<sup>1</sup> [Data Model](#); [Software Requirements Specification](#); [Wireframes](#); [Migration Maps](#); and [Jira Issue](#).

## Current Behavior:

Home / Agents / Detroit. Commission on Community Relations

Basic Information >

Dates of Existence >

Names >

Linked Records >

Edit
Add Event ▾
Download EAC-CPF
View Published
Merge ▾
Delete

### Detroit. Commission on Community Relations Agent

#### Basic Information

Agent Type Corporate Entity

Publish True

Created by af3973 2015-05-05 12:22:28 -0400, Last Modified by af3973 2016-09-20 10:41:55 -0400

#### Dates of Existence

> Existence 1953

#### Names

> Detroit. Commission on Community Relations Authorized Display Name

#### Linked Records Go to Search Results

Showing 1 - 3 of 3 Results Sort by: Select ▾

Record Type	Title	Created by af3973 2016-04-08 14:52:03 -0400 Last Modified by af3973 2016-12-09 14:48:53 -0500	View Edit
Resource	John Musial Papers		
Resource	Detroit Commission on Community Relations (DCCR) / Human Rights Department Photographs and Other Material	Created by ai0027 2017-01-18 14:53:48 -0500 Last Modified by ai0027 2017-01-19 16:39:57 -0500	View Edit
Resource	Detroit Commission on Community Relations (DCCR) / Human Rights Department Records	Created by af3973 2016-07-07 11:40:36 -0400 Last Modified by af3973 2017-05-31 14:24:46 -0400	View Edit

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## Desired Behavior:

Home / Agents / Detroit. Commission on Community Relations

Basic Information > Dates of Existence > Names > Linked Records >

**Edit** Add Event Download EAC-CPF View Published Merge Delete

## Detroit. Commission on Community Relations Agent

### Basic Information

Agent Type Corporate Entity  
Publish True

Created by af3973 2015-05-05 12:22:28 -0400, Last Modified by af3973 2016-09-20 10:41:55 -0400

### Dates of Existence

> Existence 1953

### Names

> Detroit. Commission on Community Relations **Authorized** **Display Name**

### Linked Records Go to Search Results

Showing 1 – 4 of 4 Results Sort by: Select

Record Type	Title	Created by	Last Modified by	View	Edit
Resource	John Musial Papers	af3973 2016-04-08 14:52:03 -0400	af3973 2016-12-09 14:48:53 -0500	<a href="#">View</a>	<a href="#">Edit</a>
Resource	Detroit Commission on Community Relations (DCCR) / Human Rights Department Photographs and Other Material	ai0027 2017-01-18 14:53:48 -0500	ai0027 2017-01-19 16:39:57 -0500	<a href="#">View</a>	<a href="#">Edit</a>
Resource	Detroit Commission on Community Relations (DCCR) / Human Rights Department Records	af3973 2016-07-07 11:40:36 -0400	af3973 2017-05-31 14:24:46 -0400	<a href="#">View</a>	<a href="#">Edit</a>
Archival Object	Detroit Commission on Community Relations (DCCR) / Human Rights Department Records- Series 1: City of Detroit Interracial Committee, 1942—1963	af3973 2016-07-07 11:40:36 -0400	af3973 2017-09-10 12:15:02 -0500	<a href="#">View</a>	<a href="#">Edit</a>

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## Resources and Accessions of Child Agents should appear in Parents linked records list ([AR-1764](#))

Child agents (i.e., “Subordinate agents” of “Superior agents”) should have their linked resource and agents appear in (and be linked to) the list of linked resource and accession records of the parent agents because inheritance.

The SIEWG Team notes that this can be both helpful in terms of inheritance, findability and accessibility of related agents, eliminating potential of duplicates, etc., but also potentially a hindrance in the form of erroneous links, long lists of many child agents, and - depending upon

the agent (e.g. governmental bodies) - potentially difficult to identify which agent belongs to which record. The Team recommends further discussion and development of use cases to discover any potential negative consequences before implementing this feature.

**Current Behavior:**

The screenshot shows a web interface for an agent record. At the top, there are navigation buttons: 'Edit', 'Add Event', 'Download EAC-CPF', 'View Published', 'Merge', and 'Delete'. The main title is 'National Association for the Advancement of Colored People' with a blue 'Agent' tag. Below this is a 'Basic Information' section with fields for 'Agent Type' (Corporate Entity) and 'Publish' (True). A metadata line indicates 'Created by af3973 2015-05-01 16:56:47 -0400, Last Modified by af3973 2017-09-09 17:31:19 -0400'. The 'Names' section shows the full name and buttons for 'Authorized' and 'Display Name'. The 'Related Agents' section features a 'Subordinate/Superior Relationship' box with 'Relationship Type' 'Is Subordinate to Related' and 'Related Agent' 'National Association for the Advancement of Colored People. Detroit Branch'. The 'Linked Records' section shows a table with 26 results, displaying one row for 'Carrie Burton Overton Photographs' with 'View' and 'Edit' buttons.

Record Type	Title	Created by	Last Modified by	View	Edit
Resource	Carrie Burton Overton Photographs	ai0027 2017-03-23 15:16:04 -0400	ai0027	<a href="#">View</a>	<a href="#">Edit</a>

**Desired Behavior:**

[Edit](#)

[Add Event](#)
[Download EAC-CPF](#)
[View Published](#)
[Merge](#)
[Delete](#)

## National Association for the Advancement of Colored People

Agent

### Basic Information

Agent Type: Corporate Entity  
 Publish: True  
 Created by af3973 2015-05-01 16:56:47 -0400, Last Modified by af3973 2017-09-09 17:31:19 -0400

### Names

> National Association for the Advancement of Colored People
 
[Authorized](#)
[Display Name](#)

### Related Agents

#### Subordinate/Superior Relationship

Relationship Type: Is Subordinate to Related  
 Related Agent: [National Association for the Advancement of Colored People. Detroit Branch](#)

### Linked Records

Number of results increases because linked records now include the accessions and resources linked to the subordinate related agent.
 [Go to Search Results](#)

Showing 21 - 30 of 37 Results Sort by: [Select](#)

Record Type	Title	Created by	Last Modified by	View	Edit
Resource	Carrie Burton Overton Photographs	ai0027	ai0027	<a href="#">View</a>	<a href="#">Edit</a>

**Suggested revision if this idea goes forward:**

Kansas State Agricultural College Agent

**Basic Information**

Agent Type: Corporate Entity  
 Publish: True

Created by admin 2017-12-14 11:58:54 -0800, Last Modified by admin 2017-12-14 12:21:22 -0800

**Names**

> Kansas State Agricultural College Authorized Display Name

**Related Agents**

**Earlier/Later Relationship**

Relationship Type: Earlier Form of Related  
 Related Agent: [Kansas State University](#)

**Subordinate/Superior Relationship**

Relationship Type: Is Superior of Related  
 Related Agent: [Kansas State Agricultural College. Engineering Experiment Station](#)

**Linked Records** Go to Search Results

Showing 1 - 2 of 2 Results Sort by: Select

Record Type	Heading	Title	Identifier		
Resource		UMLA Test Collection	001	Created by admin 2017-05-18 09:03:22 -0700 Last Modified by admin 2017-12-14 12:20:03 -0800	<a href="#">View</a> <a href="#">Edit</a>
Resource	<a href="#">Kansas State Agricultural College. Engineering...</a>	Experimental record	9512	Created by admin 2016-09-19 09:53:57 -0700 Last Modified by admin 2017-12-14 12:19:14 -0800	<a href="#">View</a> <a href="#">Edit</a>

## Show all Linked Agents in an Agent Record ([AR-1768](#))

All earlier and later forms of an agent should be automatically linked to one another. Currently, only earlier/later forms of agents are only linked if done so manually. In the example below, I linked Council of Social Agencies of Metropolitan Detroit, United Way for Southeastern Michigan, and Community Chest of Metropolitan Detroit to United Community Services of Metropolitan Detroit. However, I did not link the first three agents to one another, therefore in each of their agent records, they are only linked to United Community Services of Metropolitan Detroit.

### Current Behavior:

**United Community Services of Metropolitan Detroit** Agent

**Basic Information**

Agent Type Corporate Entity  
 Publish True  
Created by af3973 2015-02-03 14:14:15 -0500, Last Modified by af3973 2016-04-13 21:00:44 -0400

**Names**

> United Community Services of Metropolitan Detroit Authorized Display Name

**Contact Details**

> United Community Services of Metropolitan Detroit

**Related Agents**

**Earlier/Later Relationship**

Relationship Type Earlier Form of Related  
 Related Agent [Council of Social Agencies of Metropolitan Detroit](#)

**Earlier/Later Relationship**

Relationship Type Later Form of Related  
 Related Agent [United Way for Southeastern Michigan](#)

**Earlier/Later Relationship**

Relationship Type Earlier Form of Related  
 Related Agent [Community Chest of Metropolitan Detroit](#)

**Council of Social Agencies of Metropolitan Detroit** Agent

**Basic Information**

Agent Type Corporate Entity  
 Publish True  
Created by af3973 2015-05-20 14:37:36 -0400, Last Modified by af3973 2016-09-19 10:58:33 -0400

**Names**

> Council of Social Agencies of Metropolitan Detroit Authorized Display Name

**Related Agents**

**Earlier/Later Relationship**

Relationship Type Later Form of Related  
 Related Agent [United Community Services of Metropolitan Detroit](#)

(Only showing Council of Social Agencies of Metropolitan Detroit for brevity.)

**Desired behavior:**

Earlier and later forms of agents should be linked based on the behavior of the cataloging source. In the example mockup below, the rule of the cataloging source is that all previous/later forms of the agent are linked.

**Council of Social Agencies of Metropolitan Detroit** Agent

**Basic Information**

Agent Type: Corporate Entity  
Publish: True  
Created by a19873 2015-05-20 14:37:35 -0400, Last Modified by a19873 2015-05-18 10:58:33 -0400

**Names**

> Council of Social Agencies of Metropolitan Detroit Authorized Display Name

**Related Agents**

**Earlier/Later Relationship**

Relationship Type: Later Form of Related  
Related Agent: United Community Services of Metropolitan Detroit

**Related Agents**

**Earlier/Later Relationship**

Relationship Type: Later Form of Related  
Related Agent: United Way for Southeastern Michigan

**Related Agents**

**Earlier/Later Relationship**

Relationship Type: Later Form of Related  
Related Agent: Community Chest of Metropolitan Detroit

List all earlier/ later agent relationships

## Managing Agents and Subjects

### A. Merge or bulk select Agents or Subjects

The current browse Agent/Subjects results screens should have two pieces of functionality added. 1. A “Select All” button, and 2. A button for “merge” should be added to the current “view” and “edit” button selections. Screenshots below.



**Current view:**

Record Type	Agent Name	Authority ID	Source	Rules	
<input type="checkbox"/> Corporate Entity	Abbey Theatre		NACO Authority File	Anglo - American Cataloging Rules	Created by admin 2017-06-02 18:04:14 -0400 Last Modified by admin 2017-06-02 18:04:14 -0400 View Edit
<input type="checkbox"/> Corporate Entity	Abbey Theatre.		Unspecified ingested source		Created by admin 2017-06-02 18:07:22 -0400 Last Modified by admin 2017-06-02 18:07:22 -0400 View Edit

**Proposed layout:**

Record Type	Agent Name	Authority ID	Source	Rules	
<input type="checkbox"/> Corporate Entity	Abbey Theatre.		Unspecified ingested source		Created by admin 2017-06-02 18:07:22 -0400 Last Modified by admin 2017-06-02 18:07:22 -0400 View Edit Merge
<input type="checkbox"/> Corporate Entity	Abbey Theatre		NACO Authority File	Anglo-American Cataloging Rules	Created by admin 2017-06-02 18:04:14 -0400 Last Modified by admin 2017-06-02 18:04:14 -0400 View Edit Merge

1. The “select all” checkbox would mimic the one currently on the Manage Top Containers results screen to keep functionality similar across the application. The results set to be selected could first be filtered using the existing search box, making “select all” more broadly useful.
2. The “Merge” button would open functionality just like the “Merge” option within controlled value lists. (Except the display should show both the Source and Authority ID for the record that will be the remaining record.) This means the Agent(s) originally selected would be merged into another Agent which the user would select from a drop-down in the pop-up box:

Or: Previously proposed solution for this behavior for comparison:

Record Type	Agent Name	Authority ID	Source	Rule	Created by admin	Last Modified by admin	View	Edit
<input type="checkbox"/>	Abbey Theatre		NACO Authority File	Anglo - American Cataloging Rules	2017-06-02 18:04:14 -0400	2017-06-02 18:04:14 -0400	View	Edit
<input type="checkbox"/>	Abbey Theatre.		Unspecified ingested source		2017-06-02 18:07:22 -0400	2017-06-02 18:07:22	View	Edit

“Create Agent” would open a blank new Agent record as it currently does, “Merge Agents” would open functionality similar to the “Merge” option within a resource record, and “Delete Agents” would pop up a confirmation box and then delete the selected records. (Note: This functionality to indicate which record will be the remaining record after the merge isn’t worked out in this solution, and comments on the draft indicated that the lack of clarity about which Agent would remain and which would be merged out of existence was problematic.)

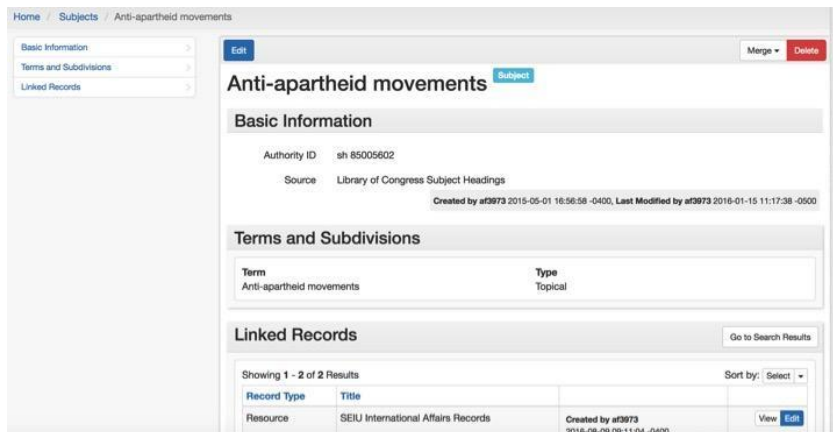
## B. Sort Agents and Subjects attached to a record

1. The ability to click a button to sort Agent links in the resource record into alphabetical order grouped by their Role. Example all the Creators are together and sorted alphabetically, followed by all the agents with the role of Subject sorted alphabetically. This will allow users to easily be able to tell if they've already added a heading or not
2. The ability to sort Subject links in alphabetical order and then rearrange as needed. (The rearrangement is necessary because the first subject in some systems is supposed to be the primary subject heading)
3. Both of the above changes should happen in a such a manner that the new order is the export order for EAD or PDF finding aids.

## Subject records

The SIEWG recommends a dedicated ad-hoc group to review Subjects module, similar to the group that is reviewing the Agents module. In addition to a thorough review of how Subjects should be handled in ASpace, the group should investigate the feasibility of implementing the JIRA issue: Add ability to Relate Subjects and Link Related Subjects ([AR-1553](#)). While the mock ups and suggested behavior belows are potentially helpful technical approaches, the SIEWG Team strongly recommends a more expansive investigation by the future Subjects Team.

### Current Behavior:



The screenshot displays the 'Anti-apartheid movements' record in the ASpace Subjects module. The interface includes a left sidebar with navigation options: 'Basic Information', 'Terms and Subdivisions', and 'Linked Records'. The main content area is titled 'Anti-apartheid movements' and features a 'Subject' tag. It is divided into three sections: 'Basic Information', 'Terms and Subdivisions', and 'Linked Records'. The 'Basic Information' section shows the Authority ID as 'sh 85005602' and the Source as 'Library of Congress Subject Headings', with creation and modification dates. The 'Terms and Subdivisions' section shows the Term 'Anti-apartheid movements' and the Type 'Topical'. The 'Linked Records' section shows a table with one record: 'Resource' 'SEIU International Affairs Records', created by 'af3973' on '2018-06-08 09:11:04 -0400'. The table has columns for 'Record Type', 'Title', and 'Created by'.

### Desired Behavior:

Home / Subjects / Anti-apartheid movements

Basic Information >  
 Terms and Subdivisions >  
 Related Subjects >  
 Linked Records >

Add related subjects in side nav.

Add related subjects subrecord in Subject record. When edit mode is selected, this subrecord is able to be edited, and subjects can be added as related subjects.

**Anti-apartheid movements** Subject

**Basic Information**

Authority ID sh 85005602  
 Source Library of Congress Subject Headings  
 Created by af3973 2015-05-01 16:56:58 -0400, Last Modified by af3973 2016-01-15 11:17:38 -0500

**Terms and Subdivisions**

Term	Type
Anti-apartheid movements	Topical

**Related Subjects**

Term	Type
Anti-apartheid movements -- United States	Topical

**Linked Records** Go to Search Results

Showing 1 - 2 of 2 Results Sort by: Select

Record Type	Title	Created by
Resource	SEIU International Affairs Records	af3973

View Edit  
 2016-08-09 09:11:04 -0400

Users can link related subjects in the subject record in the related subject subrecord.

## Batch-relating subjects

In the related subject subrecord, there could be a browse button, which would open an overlay (or perhaps in a new tab) like browsing to attach a subject in an accession or resource record. This would allow users to attach multiple related subjects. See mockup below. If possible, it would be nice to tweak this screen to get more subjects to show up at once.

~~Browse Subjects~~ Batch Relate to Subject: [name of open subject record here]

Download CSV

Filtered By [Clear All](#)

- Text: united states **X**

Showing 61 - 70 of 105 Results      Sort by: Title Ascending    and: Relevance

united states

Source

- Unspecified ingested source **49**
- Library of Congress Subject Headings **45**
- local\_LC **11**

Term Type (First)

- Topical **88**
- Geographic **15**
- Cultural context **2**

Title	Created by	Last Modified by
<input checked="" type="checkbox"/> United States -- History -- Civil War, 1861-1865 -- Campaigns	mridder	dborrel
<input checked="" type="checkbox"/> United States -- History -- Civil War, 1861-1865 -- Personal narratives	mridder	jacore
<input checked="" type="checkbox"/> United States -- History -- French and Indian War, 1754-1763	jcmetters	dborrel
<input type="checkbox"/> United States -- History -- War of 1812	mridder	dborrel
<input type="checkbox"/> United States -- National Guard	mridder	dborrel
<input type="checkbox"/> United States -- Politics and government	jcmetters	jcmetters
<input type="checkbox"/> United States -- Politics and government -- 20th century	dre0001	

Optional view #2 utilizes the capability to select multiple Subjects, indicate in a drop down menu whether they should be linked before or later another selected Subject. (The mockup is based off of the Assessments module, hence the Resource titles, even though Subjects would be selected instead.)

**Subjects \***

**(select multiple subjects)**

<input type="checkbox"/>	Robert Coles papers	<input type="checkbox"/>
<input type="checkbox"/>	Richard Ford papers	<input type="checkbox"/>
<input type="checkbox"/>	Battle Creek Sanitarium collection	<input type="checkbox"/>
Type to search available records..		

**Link: Earlier  
Later**

**To**

**Subjects \***

Type to search available records..	<input type="checkbox"/>
Type to search available records..	

Additionally, a report that generates a list of subjects that are not linked to any records would be useful from a data clean up perspective.