

Top Containers

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Overview

This document draws together recommendations from several SIEWG groups relating to Top Containers. While the terminology of Top Containers can be confusing for novice users, the practical application of Top Containers is an extremely important and helpful feature of ArchivesSpace. The following recommendations address issues of navigation, visual display, and propose expanding the functionality of Top Containers.

Top Container Navigation

The layout for accessing and editing Top Container is very confusing. ([ANW-10](#)) contains multiple issues:

Issue 1: There's no way to create Top Container profiles from the main drop down menus.

Solution: As described in [AR-1407](#), add Top Containers to the Browse and Create menus. For a mockup, view the [Organization of Menus document](#). The current mockup contains a link for container profile. Creating Top Containers from a centralized menu is currently mocked up under System Administration>Manage Top Containers

Issue 2: How to enter a Top Container is confusing - the small arrow to the right of the box is not labelled or immediately apparent to a new user.

Current View:

The screenshot shows a web form titled "Instances" with two buttons at the top right: "Add Container Instance" and "Add Dig". The form contains several input fields:

- Type ***: A dropdown menu.
- Top Container ***: A search bar with the placeholder text "Type to search available records..". To the right of the search bar is a small grey arrow button, which is circled in red. A red callout box points to this button with the text: "Create" is in here, but it is not intuitive and difficult to find if you do not already know it is there.
- Child Type**: A dropdown menu.
- Child Indicator**: A text input field.
- Grandchild Type**: A dropdown menu.

Possible Solution: Add visible "Browse" and "Create" options below the search bar. Implementing this in across the application would be helpful from an accessibility perspective, since it is described for screen readers as "list, 2 items" and would be helpful for novice users as well.

The screenshot shows a web interface titled "Instances". At the top right, there are two buttons: "Add Container Instance" and "Add Digital Object". Below the title bar, there is a form with several fields:

- Type ***: A dropdown menu.
- Top Container ***: A search input field with the placeholder text "Type to search available records..". Below this field are two buttons: "Browse Top Containers" and "Create New Container". A red line points from the text "Add visible 'Browse' and 'Create' options" to these two buttons.
- Child Type**: A dropdown menu.
- Child Indicator**: A text input field.
- Grandchild Type**: A dropdown menu.
- Grandchild**: A text input field.

Issue 3: When clicking "Browse Top Containers," it comes to a place where you have to search for the collection you were just working on.

It would be nice to automatically only pull up Top Containers from the collection the user is currently working on, with an option to search further in case it's a shared container.

Issue 4: Browsing Top Containers currently is problematic because the Search button is currently hidden from view and most people would instinctively click on "Link to Top Containers," which doesn't accomplish the task or yield search results.

Potential Solution:

- Because of the screen real estate needed for this function, we recommend opening a new page or tab, because the current pop-up window doesn't yield enough screen space.

- Current view of “Browse Top Containers” - the Search Button is hidden.

Browse Top Containers [Close]

Top Containers

Keyword

Barcode(s)

Resource [Dropdown]

Accession [Dropdown]

Container Profile [Dropdown]

Location [Dropdown]

Exported to ILS

[Link to Top Containers](#) Cancel

- Desired view: Replace “Link to Top Containers” with “Search” button. The “Link to Top Containers” button should appear once search results are available. Although not pictured, make this screen a new tap or full window for more screen real estate and functionality.

Browse Top Containers [Close]

Top Containers

Keyword

Barcode(s)

Resource [Dropdown]

Accession [Dropdown]

Container Profile [Dropdown]

Location [Dropdown]

Exported to ILS

[Search](#) Cancel

- The Search Results should load into the viewable screen. Currently, the results are hidden below the screen, making it look to the novice user like the search has failed. The top portion of the screen should collapse to enable the results to be visible higher up on the screen. Ideally, it would be replaced by just the relevant used search parameters and also a “New Search” button. NOTE: the search results screen through this navigation does not match the existing desired functionality available by navigating through the existing Cog menu>Manage Top Containers. Current view of Search results pop-up window as navigated through a Resource. The bulk functions and column reordering functionality doesn’t work, there are radio buttons and not check boxes.

Browse Top Containers ✕

Matching results: 17

Click a column to set the sort ordering. Hold shift to sort by multiple columns.
Click a row to select it for bulk operations. Hold alt while clicking a checkbox to select, or unselect, multiple previous rows.

	Resource/Accession	Series	Container Profile	Indicator	Barcode	Current Location	ILS Holding ID	Restricted?	Exported to ILS
<input checked="" type="radio"/>	• MSS 464 large Sean Gervasi papers			1	M04010 802	Remote storage [Off-site]		False	Not exported
<input type="radio"/>	• MSS 464 large Sean Gervasi papers			2	M04010 803	Remote storage [Off-site]		False	Not exported
<input type="radio"/>	• MSS 464 large Sean Gervasi papers			3	M04030 101	Remote storage [Off-site]		False	Not exported
<input type="radio"/>	• MSS 464 large Sean Gervasi papers			4	M04030 102	Remote storage [Off-site]		False	Not exported

[Link to Top Containers](#) Cancel

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View of search results via cog menu>Top Container Profiles. Existing view has greater functionality than previous view, but could use a “Select all” label for the top check box, have a condensed view of the used search parameters at the top, and a link to initiate a new search (including for shared containers). It would also be helpful if the Cancel button could be colored Red for greater visual distinction. This view, plus the recommended tweaks should be the

same, regardless of the navigation.

Bulk Operations ▾

Matching results: 17

Click a column to set the sort ordering. Hold shift to sort by multiple columns.
Click a row to select it for bulk operations. Hold alt while clicking a checkbox to select, or unselect, multiple previous rows.

<input checked="" type="checkbox"/>	Resource/Accession	Series	Container Profile	Indicator ▾	Barcode	Current Location	ILS Holding ID	Restricted?	Exported to ILS	
<input checked="" type="checkbox"/>	MSS 464 large Sean Gervasi papers			1	M04010 802	Remote storage [Off-site]		False	Not exported	View Edit
<input checked="" type="checkbox"/>	MSS 464 large Sean Gervasi papers		Record Carton Linear Foot [15d, 10h, 12w inches] extent measured by width	2	M04010 803	Remote storage [Off-site]		False	Not exported	View Edit

There are no breadcrumbs back to the list of boxes for a particular record within the Top Container feature - [AF-1716](#)

Issue:

After doing a Top Container search (via the cog menu) and selecting a Top Container record to View/Edit there is no way to return to the previous search results.

Current View/Process:

Top Containers

Keyword

Barcode(s)

Resource

Accession

Container Profile

Location

Exported to ILS

Unassociated containers

[Search](#)

Clicking View opens the container profile in the same tab - perhaps making it open in a new tab would be a quick fix

Bulk Operations ▾

Matching results: 6

Click a column to set the sort ordering. Hold shift to sort by multiple columns.
Click a row to select it for bulk operations. Hold alt while clicking a checkbox to select, or unselect, multiple previous rows.

<input type="checkbox"/>	Resource/Accession	Series	Container Profile	Indicator ▾	Barcode	Current Location	ILS Holding ID	Restricted?	Exported to ILS	
<input checked="" type="checkbox"/>	H--Mss--1045 Honnold/Mudd Manuscript Collection			1				False	Not exported	View Edit
<input type="checkbox"/>	H--Mss--1045 Honnold/Mudd Manuscript Collection			2				False	Not exported	View Edit

Current view of the selected Top Container: no way to navigate back to the search results or Resource's Top Container list

Home **Top Containers** Box 1

Container Information >
Active Restrictions >
Linked Records >

Clicking here only takes you back to the blank Top Container search page, instead of the record's top container list

Edit

Box 1 **Top Container**

Indicator 1
Container Type Box
Exported to ILS Not exported

Active Restrictions

No Active Restrictions

Linked Records

Showing 1 - 10 of 75 Results

Record Type	Title
Archival Object	Lovell, James cargo manifest on board 1811 November 13
Archival Object	MacVeagh, Franklin correspondence to 1913 February 8

Proposal: this View/Edit of the selected Top Container should be a pop-up/overlay (more preferable) or a new browser tab. It should also be possible within the breadcrumbs to navigate to the Resource's Top Container list (as the most common use of this function, although perhaps additional member feedback would be beneficial on this detail) as mocked up below.

Home / Top Containers / Honnold/Mudd Manuscript Collection

Make the resource's Top Container list a separate page, which can be navigated back to in the navigation link bar here.

Top Containers

Keyword

Barcode(s)

Resource

Accession

Container Profile

Location

Exported to ILS

Unassociated containers

Bulk Operations ▾

Matching results: 6

Click a column to set the sort ordering. Hold shift to sort by multiple columns.
Click a row to select it for bulk operations. Hold alt while clicking a checkbox to select, or unselect, multiple previous rows.

<input type="checkbox"/>	Resource/Accession	Series	Container Profile	Indicator	Barcode	Current Location	ILS Holding ID	Restricted?	Exported to ILS	
<input type="checkbox"/>	H--Mss--1045 Honnold/Mudd Manuscript Collection			1				False	Not exported	<input type="button" value="View"/> <input type="button" value="Edit"/>

Adding Container Instances in RDE

Add the ability to link Container Profiles, ILS holdings, and location to RDE Container Instances

In v. 2.1.0, the create top container within RDE displays a simplified window. What if it displayed this standard view in order to link to container profiles - otherwise, it discourages staff from easily linking to Container Profiles.

Current view:

Rapid Data | Create Top Container

Container Type

Indicator *

Barcode

Save Rows Create and Link to Top Container Cancel

Desired view:

Create Top Container

Container Profile Type to search available records..

Container Type

Indicator *

Barcode

Barcode length for this repository: 0-255 characters

ILS Holding ID

ILS Item ID

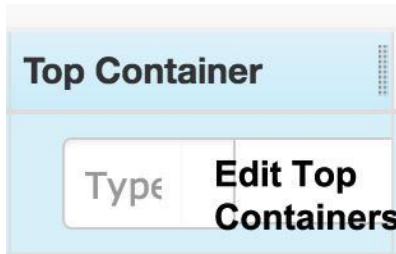
Exported to ILS Not exported

Locations Add Location

Create and Link to Top Container Cancel

Issue: It should be possible to link an archival object to more than one Top Container in RDE.

One possible solution could be to maintain the easy type-in of the Top Container and relabel the nearby box "Edit Top Containers"



This opens the “Create Top Container” view, but also includes the button at the bottom to “Add Container Instance” (this button should be a solid and constantly visible button, not fading in and out as the current function does)

 A screenshot of a form titled 'Create Top Container'. The form contains several input fields:

- 'Type *' with a dropdown menu.
- 'Top Container *' with a search input field containing the text 'Type to search available records..' and a dropdown arrow.
- 'Child Type' with a dropdown menu.
- 'Child Indicator' with a text input field.
- 'Grandchild Type' with a dropdown menu.
- 'Grandchild Indicator' with a text input field.

 At the bottom of the form is a button labeled 'Add Container Instance'.

Second possible solution:

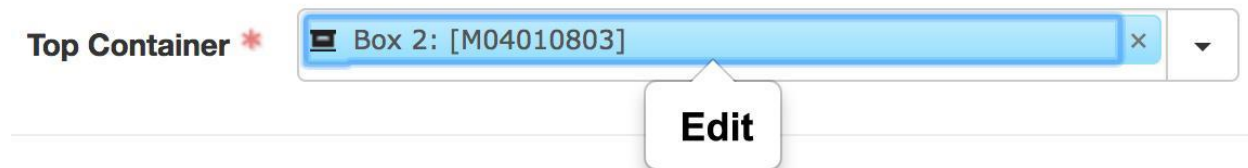
Similar to linking multiple Resources to a single field in the Assessments module, it should be possible to typeahead to select multiple existing Top Containers. The assumption would be that the column would expand slightly to reflect all of the linked containers.

Another option would be to insert additional Top Container columns with a checkbox. However, it's uncertain if inserting the additional columns would break the RDE templates. In general, having the ability to insert desired RDE columns mid-data entry, be it to link Agents and Subjects, or any other desired fields, would be a helpful improvement.

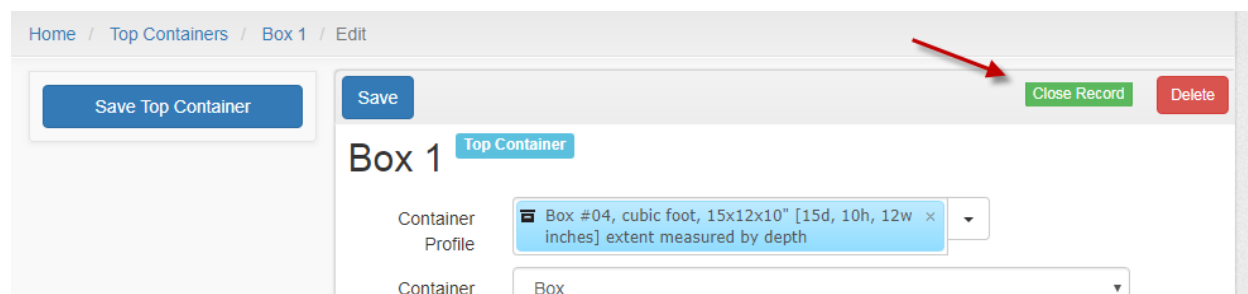
Instance		Additional Instance?				
Instance Type	Top Container	Child Type	Child Indicator	Grandchild Type	Grandchild Indicator	
<input type="text"/>	Type <input type="checkbox"/>	Create <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Issue: There are too many steps to edit/add a Top Container Profile to a previously created Top Container

The navigation for Top Containers has improved since the beginning of SIEWG. To further improve streamlining the Top Container navigation, we recommend replacing “View” with “Edit,” to reduce another step for users with edit permissions.



This recommendation will open the Top Container record in Edit mode by default.¹ There needs to be an intuitive way to toggle the Top Container record to View mode. Recommend adding a “Close Record” button similar to the button in a resource record.



It should also be possible to easily navigate to the Top Container listing for the Resource, ideally by a button or link (tentatively called “Top Containers” or “Resource Top Container” - specifically containers linked to that Resource). Currently, accessing this view is possible by the Cog menu>Manage Top Containers or through an individual instance of the Resource. Having it more accessible would yield a great gain in usability for implementing bulk edits, etc.



This potentially also ties in with [Ar-838](#): The ability to easily toggle between the intellectual arrangement and the physical arrangement of the collection. This view should function similar to the PUI Top Containers view but instead of needing to click on individual boxes, the finding aid data should appear as a consecutive list with Box-folder information, Title, date, etc. The folder order should be consecutive.

Current PUI view of Top Containers: being able to view the existing inventory in the physical arrangement, without having to click on each box, would be even more helpful.

¹ Although SIEWG didn't have time to address this accessibility issue, further thought needs to go into the down-arrow for Top Containers. Being able to access the View/Edit mode for a Top Container first by clicking on the unmarked Top Container isn't particularly intuitive or accessible. It would be ideal to label these functions more clearly and possibly combine lump together this functionality.

Gary Gildner papers

Collection Identifier: MSS 210 large

Michigan State University Libraries Special Collections | Gary Gildner papers

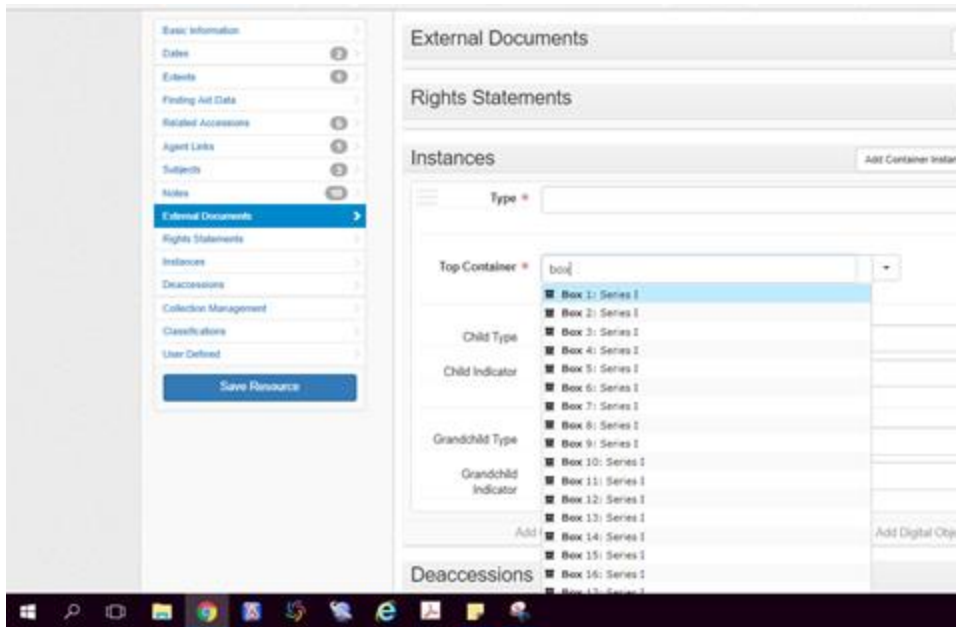
- Collection Overview
- Collection Organization
- Container Inventory

Box 1
Container
Found in: Michigan State University Libraries Special Collections

Box 2
Container
Found in: Michigan State University Libraries Special Collections

Autofill of “Top Container” field

When choosing an already-created Top Container for a Container Instance, the autofill option should work for ANY Top Container already affiliated with that collection, not just the first 100. The Browse option for locating a container takes a lot of clicks and should only be necessary for finding a Top Container affiliated with another collection.



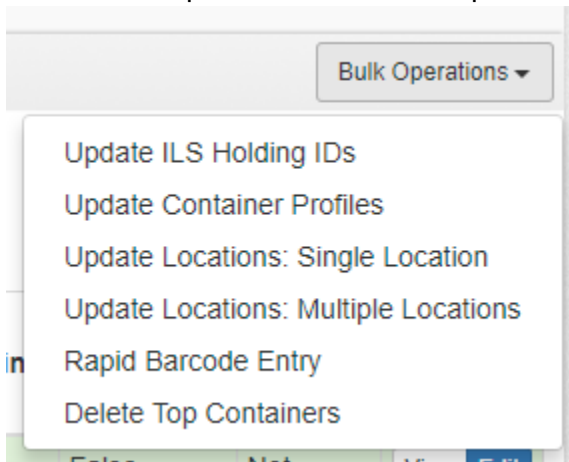
Manage Top Containers functionality

Bulk Edit Multiple Locations

The Bulk Operations button in the Manage Top Containers results page needs an intermediary step added to allow updating locations for an entire collection that includes several boxes each on several shelves. Update Locations: Multiple Locations under Bulk Operations allows selecting multiple boxes to be changed to multiple locations, but after selection their locations have to be set one box at a time. Desired functionality would be to select boxes from the top containers results list, which now also lets you “select all” via the check-box at the top of the results list. Note: for accessibility, the top box should be labeled “Select All.”

<input checked="" type="checkbox"/>	Resource/Accession	Series	Container Profile
<input checked="" type="checkbox"/>	MS--1986--054 Boston College collection of Yeats family papers	• Serie	

Then select Update Locations: Multiple Locations under Bulk Operations:



This resulting screen would need to have the check-boxes just like the original results screen to allow for adding locations to multiple boxes at once:

Update Locations: Multiple Locations

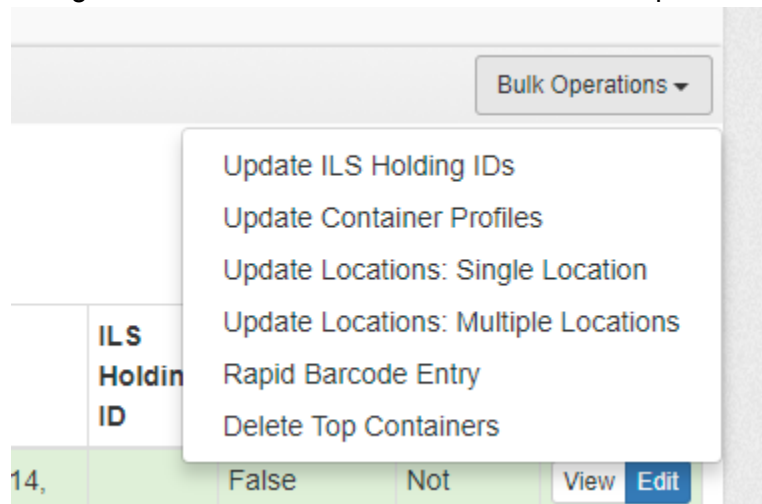
Choose a Location for each selected container.

Resource/Accession	Container Profile	Indicator	Barcode	Current Location	New Location
• MS-1986-054 Boston College collection of Yeats family papers		1		Burns Library, Level 1, Room 114, N/A [Aisle: 5, Bay: 2, Shelf: 1]	Type to search available records..
• MS-1986-054 Boston College collection of Yeats family papers		10		Burns Library, Level 1, Room 114, N/A [Aisle: 5, Bay: 2, Shelf: 2]	Type to search available records..
• MS-1986-054 Boston College collection of Yeats family papers		1-3		Burns Library, Level 1, Room 111, Unit 5 [Microfilm cabinet: unspecified]	Type to search available records..
• MS-1986-054 Boston College collection of Yeats family papers		2		Burns Library, Level 1, Room 114, N/A [Aisle: 5, Bay: 2, Shelf: 1]	Type to search available records..
• MS-1986-054 Boston College collection of Yeats family papers		3		Burns Library, Level 1, Room 114, N/A [Aisle: 5, Bay: 2, Shelf: 1]	Type to search available records..

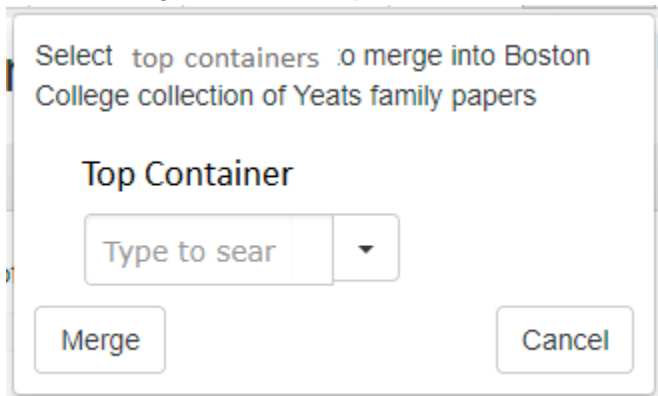
Once one set of locations had been updated, the user would be returned to this screen to select another subset to update (as happens now after updating the location on a single box).

Merge Top Containers

[AR-1436](#) This merge would work like the resource record merge, where the user could select which container in the merge kept its affiliated information. The container to be merged into would be selected by the existing check-box system in the Manage Top Containers results. “Merge Containers” would be added to the Bulk Operations menu.



Then a merge box would open to select the container to add.



Select top containers to merge into Boston College collection of Yeats family papers

Top Container

Type to search ▼

Merge Cancel

The image shows a dialog box with a title bar. The main text reads "Select top containers to merge into Boston College collection of Yeats family papers". Below this is a section titled "Top Container" which contains a search input field with the placeholder text "Type to search" and a dropdown arrow. At the bottom of the dialog are two buttons: "Merge" on the left and "Cancel" on the right.