

Browsing, Customization, Functionality, and Terminology

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Overview

This group focused on aspects of the interface related to customizing display of fields, as well as search and browse results. Through examining JIRA issues it is apparent that users want more control over what data fields are displayed. Also clear is that throughout the application users would like to see more information displayed about which accession/collection they are viewing whether in the browse or search results screens. Finally, we addressed a select number of other issues such as terminology recommendations, and feature requests that relate to new functionality or customization.

Repository-specific Templates/Customized Fields

There should be an ability for a repository manager to customize the visible labels of the staff interface and create repository-specific templates for fields (suppressing fields not

used by the institution). Option to remove fields not used in Staff Interface [ANW-121](#)
Related: Customize "Basic Information," "Dates," "Extents" and "Finding Aid Data" fields
in the Resources module [AR-1506](#)

Proposed solution:

We suggest that ASpace allow repository managers to set which fields are displayed within a record on a repository level by adding a checkbox or other selection method for choosing which fields to display. This would allow repository managers to hide fields that are not commonly used and make it easier for students/volunteers/new users to fill out only the fields required. This can be listed under Repository Defaults or User Preference Defaults for each repository, much like the current "Note Order" drag-and-drop selection.

One issue, which the ANW-121 JIRA ticket addresses, is that some repositories might want to use different fields for different types of records; for example, a collection-level minimal finding aid might only require those fields that correspond to a DACS-compliant single-level record, while a fully processed collection with item-level description might utilize many more fields. The team agrees that a good way to facilitate this would be to expand the functions of what is currently called "Default Values." It would be great to rename this function "Data Templates" and allow users at the Repository manager level to create multiple templates appropriate for different types of records (accessions, resources, digital objects, etc.) and that allow users to choose which fields are most useful for the type of record being created (ex. A new collection vs an accretion to an existing collection, or a donation vs an intralibrary transfer) and pre-populate commonly used fields as appropriate.

Additionally, AR-1506 brings up the question of allowing users to determine the order in which modules or fields are displayed within the user interface, much like how users can currently choose Note Order in their User Preferences for each repository or their Global Preferences across repositories. We support this and propose that it be included in the above settings.

Search and Browse Data Display

Multiple Jira tickets address the issues that users want to be able to display more information about accessions and resources (as well as subjects and agents) within the staff interface for both search results as well as browsing. The group identified two options for improving search/browse results. The first, which is probably the easier of the two, is to increase the fields viewable by including additional pre-defined fields. The second option would be to allow

repository managers to set repository preferences, including the ability to **set default weights** for search results by repository (if not also by individual accounts). These options would include weighing the search results for staff to Resources and Accessions near the top. Currently, there are cases where there are pages of subject heading before ever getting to a Resource.

Relevant Jira tickets:

[AR-1762](#): search results reveal record group/series/subseries etc

[ANW-216](#): ability to configure search results to include collection id

[ANW-215](#): display extents and dates in browse screens

[AR-1652](#): include resource id in search results

[AR-980](#): set default sort preferences in browse

Browse

Browse columns

Currently users can set which columns are visible in the browse screen via the user preferences screen. Current choices are:

Accessions: Identifier, Accession Date, Acquisition Type, Resource Type, Restrictions Apply?, Access Restrictions?, Use Restrictions?, Publish?

Resources: Identifier, Resource Type, Level of Description, Language, Restrictions?, EAD ID, Finding Aid Status, Publish?

Digital Objects: Identifier, Type, VRA Core Level, Restrictions? Publish?

Users have expressed interested in having dates and extents within these browse columns. This group supports adding these two fields to the choices for browse columns. Given that multiple dates and extents can exist for a record the date displayed should be the collection level inclusive dates (or single, or bulk if inclusive dates do not exist) and the extent displayed should be the collection level whole extent only. If the collection level's extent was created as several parts, rather than a single whole, then include all parts so the entire extent is listed.

Additional consideration is whether all fields available in the basic information and collection management module for accessions/resources, as well as any user defined fields, should be available as choices for browse results.

Browse: Sort

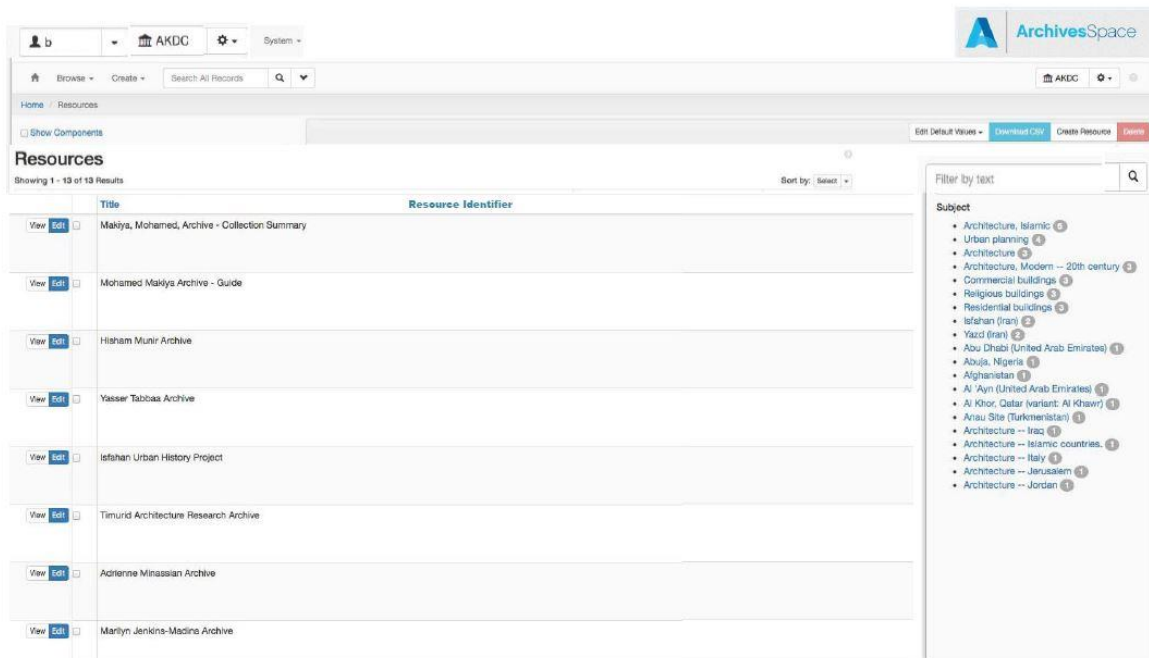
Users would like to be able to set a default sort when browsing. This should ideally be set in user preferences screen so can be chosen when setting browse columns. Assumption is that sort options should reflect browse columns selected.

Browsing Resources

Moving Last Modified section

Idea: The Last Modified information doesn't have to be visible by the search results page. By moving it to the Resource view, it can free up space for other desired data fields in the Search Results view.

A version of a proposed view for search results. In this proposed mockup, the ArchivesSpace icon is moved to the right corner and administrative menus are condensed in the header. Note the View/Edit/Select buttons on the left, the Subjects and other access points on the right, similar to the PUI. The listed Resources would have Resource Identifiers (not populated here), and the Last Modified section has been moved to the Resource view.



The Created by and Last modified by section as viewable in the Resource view:

Aperture Labs Records Resource

Basic Information

Title *

Identifier *

Level of Description *

Resource Type

Language

Publish?

Restrictions?

Repository Processing Note

Created by... Last modified by...

*** Dates** Add Date

Easy expand all/collapse all view [AR-1769](#)

In response to this JIRA ticket and exchanges on the ArchivesSpace member list, we recommend having a button to expand all/collapse all nested components within the Resource tree as well as a search bar dedicated to searching within the resource granularly through all notes. The expand-all view is helpful when needing to keyword search through a long and very nested collection. The results of this search function would be to expand the Resource tree at the applicable hierarchy, thus providing context to the search results. For example, in searching for “guitar,” it would expand each series/subseries/file/item that contains the word “guitar”. It should be possible to advance the search results through the resource tree by clicking a button and/or a keyboard command (such as Tab).

Enable Reorder Mode Rapid Data Entry Add Child **Expand View** **Search this Collection** Close Record

Goldenrod Music records	Collection
▶ Goldenrod business records	Series

Browsing sidebar

Issue: The sidebar for browsing and search results is sorted by number of records. Especially when having a long list of Subjects, Agents, Events, or year ranges, it would be more helpful to sort them chronologically if a date or alphabetically.

Example of Event list:

The screenshot shows a user interface for viewing event lists. On the left, there are two filter sections: 'Type' and 'Outcome'. The 'Type' filter lists 20 categories with counts in circles, such as 'Cataloged' (29), 'Accession' (24), and 'Processed' (23). The 'Outcome' filter lists 'Pass' (29), 'Partial Pass' (9), and 'Fail' (2). On the right, the 'Events' section shows 'Showing 1 - 100 of 178 Results'. Below this is a table with columns 'Type', 'Outcome', and 'Age'. The table contains three rows of data: 'Agreement Sent', 'Processed', and 'Cataloged', each with corresponding values in the other columns.

Type	Outcome	Age
Agreement Sent		Execution
Processed		Archival
Cataloged		Archival

Refine Search Results

While the functionality is currently available with the chevron by the search bar, it is often overlooked by many users. Instead, the text "Refine search results" should be used.

The screenshot shows a search interface. At the top, there is a search bar containing the text 'music' and a search icon. Below the search bar is a navigation menu with 'Browse' and 'Create' options. The search bar is also present in the navigation menu. Below the navigation menu, there is a 'Refine search results' button. The main content area shows 'Search Results' for 'music', with 'Showing 1 - 100 of 393 Results'. A 'Filtered By' section shows 'Text: music' with a 'Clear All' button. Below the search results, there is a table with columns 'Record Type' and 'Title'.

When browsing or viewing search results, it should be possible to View All results. This would be helpful for keyword searching the results. This could be accomplished with a view all button at the top of browse screen, or alternatively, at the bottom of the page.

Option 1:

Resources							
Showing 1 - 10 of 885 Results View All Sort by: Select							
Title	Identifier	Level of Description	Finding Aid Status	Resource Type	Publish?		
<input type="checkbox"/> Mark M. Biegel papers and photographs	0004-GWP	Collection	In Progress	Papers	false	Created by rchayer 2017-02-15 15:31:45 -0500 Last Modified by admin 2017-09-19 12:54:55 -0400	View Edit
<input type="checkbox"/> Emerson Chapin photographs and slides	0005-GWP	Collection	In Progress		false	Created by rchayer 2017-02-16 15:59:38 -0500 Last Modified by admin	View Edit

Option 2

« **1** 2 3 » [View All](#)

Search

Users are encountering difficulty in the search results because it is currently difficult to distinguish what collection archival objects belong to. Below is an example of a search for correspondence

Filtered By
Clear All

- Text: correspondence ✕

Record Type

- Archival Object 3312
- Resource 120
- Top Container 97
- Event 20
- Person 16
- Subject 9
- Family 7
- Accession 2

Creator

- African Activist Archive. 9
- Wakoski, Diane. 3
- Coles, Robert. 2
- Ferguson, Anne(Anne E.) 2
- Ford, Richard,1944- 2
- Gerber, Dan,1940- 2

Search Results

Showing 1 - 10 of 3583 Results

Sort by: Relevance ▾

Record Type	Title	Created by nicole 2015-11-11 10:34:38 -0500 Last Modified by nicole 2015-11-11 10:34:38 -0500	
Archival Object	Correspondence	Created by nicole 2015-11-11 10:34:38 -0500 Last Modified by nicole 2015-11-11 10:34:38 -0500	View Edit
Archival Object	Correspondence	Created by nicole 2015-11-11 10:34:38 -0500 Last Modified by nicole 2015-11-11 10:34:38 -0500	View Edit
Archival Object	Correspondence	Created by nicole 2015-11-11 10:34:38 -0500 Last Modified by nicole 2015-11-11 10:34:38 -0500	View Edit
Archival Object	Correspondence	Created by nicole 2015-11-11 10:34:38 -0500 Last Modified by nicole 2015-11-11 10:34:38 -0500	View Edit
Archival Object	Correspondence	Created by nicole 2015-11-11 10:34:38 -0500 Last Modified by nicole 2015-11-11 10:34:38 -0500	View Edit

In this example there is no easy way to determine what collections this correspondence belongs to or where in the hierarchy it might appear. Allowing customization of search results would allow users to display both collection id as well as level of description.

One way to solve the issue above is to allow users to customize the fields for search results to display more fields similar to the way browse columns can be customized. Our recommendation is that search results customization be available via user preference screen in the same way browse results are customized. The fields to draw from would include:

- Record Type
- Title
- Level of Description
- Identifier
- Relationship to Parent record group/series/subseries
- Date created/modified
- Dates
- Extents

Current default for search results display is: Record Type, Title, created/last modified (one display field). At the very least, users want to be able to display the identifier field within the search results. This can currently be accomplished via a plug-in but the recommendation is that be included directly into ArchivesSpace. It is desired that the identifier be the root identifier when displaying archival objects/digital objects rather the component identifier.

Another option would be to incorporate features of the public interface for solving some of these options. For instance, the “found in” line as displayed in the PUI would solve the issue of where in the hierarchy an object was found.

Showing Results: 1 - 100 of 996

The screenshot shows a search results page. At the top, there are pagination links (1-10) and a 'Sort' dropdown menu set to 'Relevance'. The main content area displays three search results:

- Album 2**: An item with a 'Scope and Contents' section describing the Conservatorio de Música Alfredo Levy collection (1880-1996) and a 'Found in' line: [GoneRepo / Conservatorio de Música Alfredo Levy collection / Music / Cuban music / Composite Volumes/Anthologies](#).
- Music,, 1841-1988**: A series with a 'Scope and Contents' section describing the Music series and a 'Found in' line: [HM Test repo / Aaron Copland Collection / Writings and Oral Presentations,](#).
- Music**: A series with a 'Scope and Contents' section describing the Conservatorio de Música Alfredo Levy collection (1880-1996).

On the right side, there is a 'Filtered By' section showing 'Type: Archival Record X'. Below it is a 'Filter Results' section with a search box and a 'Search' button. Further down is an 'Additional filters:' section with a list of repository and subject filters:

- Repository**: HM Test repo 811, GoneRepo 133, ArchivesSpace User Advisory Council Reports Subteam Testing Repository 28, Screencast Repository 12, U of M Archives and Special Collections 9, v more.
- Subject**: Account books 1, Music 1, naps -- very long ones 1, radical cheese 1, riot girl -- Portland, Oregon 1.

It may also be helpful to incorporate the icons used in the public interface with the Record Type. This would help users more quickly identify the Resource record as a very common level to edit.

Terminology

“Revert Changes” to “Cancel Changes”

To simplify and clarify wording, especially for non-native English users, replace “Revert Changes” with “Cancel Changes”

The screenshot shows a toolbar with a 'Save' button and a 'Cancel Changes' button. To the right of the 'Cancel Changes' button is a notification message: 'You have unsaved changes - Save or **Cancel** to access toolbar and record tree'. Below the notification are several menu items: 'Add Event', 'Publish All', 'View Published', 'Export', 'Merge', 'Transfer', and 'More'.

“Publish” checkbox to “Public”

An optional suggestion is to reexamine the terminology of “Publish” versus “Public.” This terminology is confusing, because it blurs the type of information (internal/external audience)

and the status of the information (i.e. that it has been pushed out to a discovery platform/PUI etc). The checkbox maps to an audience attribute in EAD. Whether informational *content* is intended for the public seems very different from what it's export *status* is.

Use-case: I want to create a finding aid and I need some notes to remain internal-only. I want to mark these "Public? No" as I go. I'll use a different top-level only field to control my export status (in my case, I use finding aid status to trigger EAD exports). If I have to go back to edit a Resource, I am updating my status to "In progress" and then editing -- not using the "Publish?" (audience attribute) to basically re-classify the informational content as "internal" .. merely to prevent it 'publishing' to my discovery platform.

(I think "publish?" also obscures the fact that via EAD at least the data IS actually publishing even when unchecked. It just publishes with audience="internal"... but anyone with access to that EAD would still see that data)

Feature Requests

Show last created Accession and Resource numbers

As described in [ANW-226](#), it would be useful to see the last identifier created at the top of the page when browsing the accessions and resource records. This might be easier than trying to install a plugin to auto generate the next accession number or resource number. Staff would be able to quickly see what the last identifier was and that would cut down on errors such as skipped numbers or two people trying to use the same number.

Spell Check

There should be a way to run a spell check across the entire database as well as within a specific Resource, especially for the Title and notes. It would also be helpful to auto-underline misspelled words during the course of data entry. The dictionary would need to be customizable for each repository to prevent repeated flags for frequently-used personal names and acronyms.

Version Control

Various ideas of version control have been discussed. Although it is already possible to see which user most recently edited the top level of a record, it was determined that it would be more useful to see who edited **any level** of the record. Ideally, it would be great to see what was changed on the record (minor vs. major change in Resource and lower levels).

Version control is worth further inquiry: would be helpful to see fuller list of the record's past editors, or clearly show what changes were made in each revision? Would it include the ability to revert to previous versions of a record, or simply see what previous iterations of a record

looked like? Would it preserve all previous versions, or a set number of previous versions (such as the three most recent iterations)?

For example, exports of finding aids are already being saved as part of Background Jobs, could there be a way to integrate this functionality?

Feedback from a reader: This would be especially helpful when there is a major revision of the resource record. When we accession collections, we create a resource record with a preliminary inventory of the collection. When that collection is processed, it is currently easier to create a whole new resource record than to revise the existing one. We would like to replace the resource record but keep a copy of the original record.

Mitigating trailing whitespace

It should be possible for users with relatively high permissions (Archivist and higher) to batch find-and-delete trailing whitespaces in the title fields. It would also be great if there was an autocorrect function to get rid of extra spaces at the end of text, but that could be easily overridden by a second attempt at adding an ending space (if, for some reason, the title needs it). Currently, there is some functionality available to address trailing whitespaces when importing inventories, but nothing existing for inventories created within ArchivesSpace.

This screenshot (below) is the result of a student cutting-and-pasting an inventory from a legacy HTML document. The weird squares are a result of that extra space. Currently, it's not visually apparent enough when there is an extra trailing space, and there's no "easy" way to fix several records at a time with this issue.



Assess Collection Management Module

SIEWG recommends a reevaluation of the Collection Management module to eliminate overlapping processing information with other modules such as processing information overlapping with Events and potentially the "Repository Processing Note," and to include additional components, such as machine-actionable fields for preservation (needs conservation yes/no and a free-text field for details) and restrictions (including machine-actionable dates for when they expire) which could be incorporated into Reports. It should be possible for these notes, including unpublished notes, to show up in the staff interface search results to quickly identify materials needing preservation actions. Reports should be easily customizable through the staff interface. Some uses for reports relating to Collection Management include surveying records that have expiring time restrictions or being able to generate a report of all accessions that are not marked in the Collections Management "Processing Status" field as Complete (this is important, since there are currently so many places to indicate processing and finding aid completion). Additionally, it would be helpful to make explicit in the individual report descriptions which reports are specifically tied to events.