There are several features in ArchivesSpace that will speed up and aid with standardization of data entry. I'll explain how we combine the ArchivesSpace settings and features with third-party programs to fill out resource records.
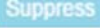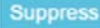
Controlled Value List Defaults

- System => Manage Controlled Value Lists
- Language ISO 639-2 => English
- Extent Extent Type => linear feet
- Extent Portion => whole
- Resource Finding Aid Description Rules => Describing Archives: A Content Standard

If you find yourself selecting the same drop-down menu values for almost every record you create, you can use the Controlled Value Lists to set the value as a default to save yourself some time.
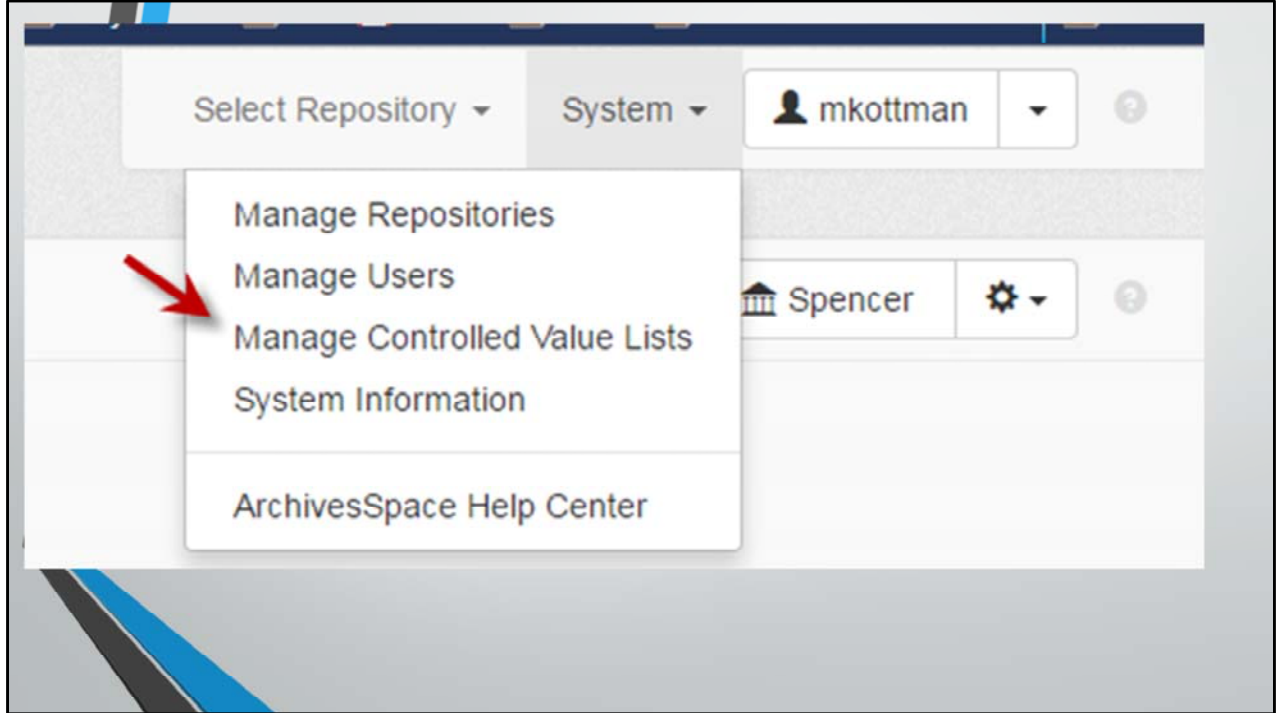
To access the lists click on System in the top right corner and select Manage Controlled Value Lists.

| eng | English | 122 ↑ ↓ | | ✓ | Unset Default Suppress | 62975 related items. |
| enm | English, Middle (1100-1500) | 123 ↑ ↓ | | | Set as Default Suppress | Not used. |

For example, since the majority of our collections are in English, we have set English as the default Language. To set as default, just click the Set as Default button. To unselect the value, click on the Unset Default button

 Additional defaults we have set are: linear feet for the extent type; whole for the extent portion and DACS for the description rules. New records will populate with these fields already filled out, however, you can easily change these values in the record when needed. So if you have a collection that is all in French, just delete English from the Language field in the resource record and type in French.

User/Global/Repository Preferences

- Set user preference defaults -- Sys admins
  - Publish
  - Pre-populate records
- Three types of preferences:
  - User => Edit these values to set user preference defaults for the current repository. These values can be overridden by a user's own preferences.
  - Global => Edit these values to set your system-wide user preferences. These values can be overridden by repository defaults or by your own preferences for a repository.
  - Repository => Edit these values to set your user preferences for this repository. These values cannot be overridden.

You can use the Preference settings to set the Publish box to always be checked when creating a new record or record section. We use a separate system as our public interface so, for us, setting the default to always have Publish? selected doesn't cause any problems, though we manually change the Accession records to not publish since it frightens the curators. System administrators can set user, global and repository preferences. You'll need to experiment to see which type of preference works for your repository configuration.
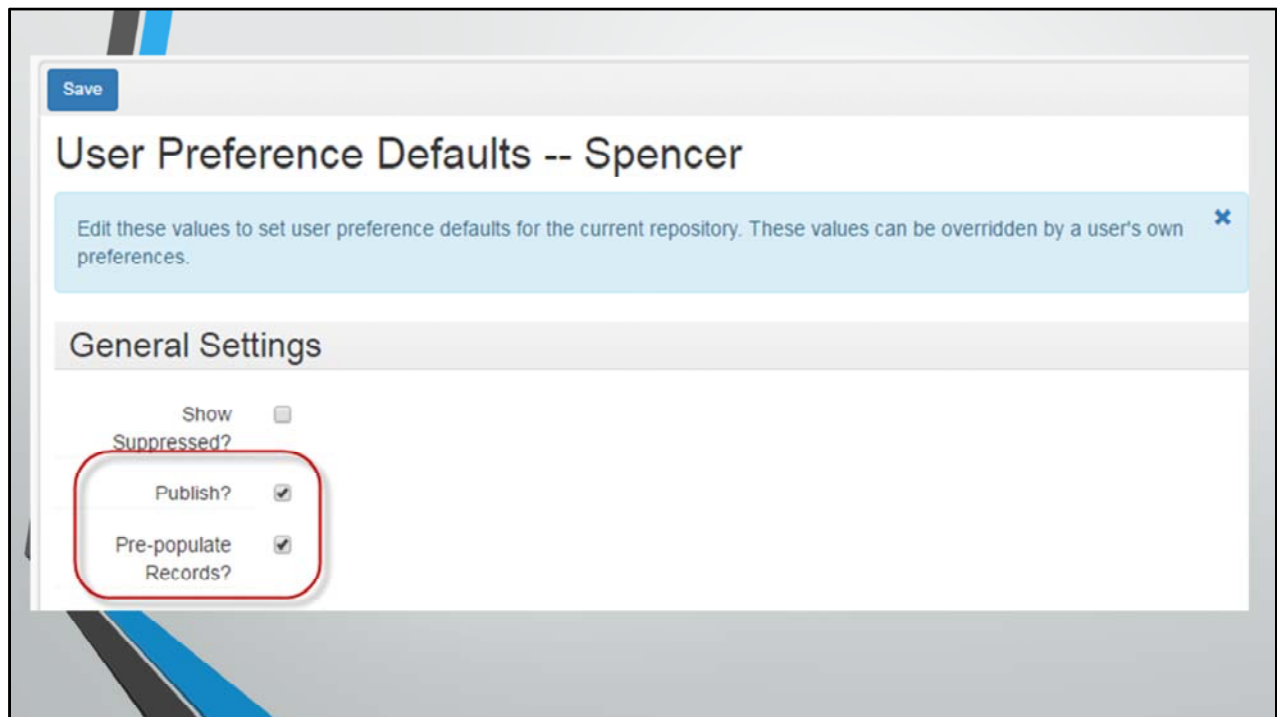
I use the User Preference which can be accessed by clicking on Settings (the gear icon) => User Preference Defaults. We haven't suppressed any records so we don't have the Show Suppressed box selected. To use the templates for Accession, Resource, Resource Component and Digital Object records, you'll need to put a check in the Pre-populate Records box.

Templates

- Only work when creating a new record (i.e. not when spawning)
- Can create for: Accession, Resource, Resource Component and Digital Object records
  - Must have Preferences set for Pre-populate records
- Browse => Resources (Accessions, Digital Objects) => Edit Default Values button
- Can add blank notes which will cause record to not validate if the content is not filled out (i.e. a reminder to add an abstract)

The templates only work when creating new records via the Create menu. In other words, they don't work when you spawn a resource record. (Probably a good thing since you don't want notes in the Accession record overwritten)

If you have the Pre-populate records selected in your preferences, the Edit Default Values button will show in the upper right corner when you BROWSE a record type

You can pre-populate fields with values that are common across most of your collections. You can also create notes with blank content fields. If someone tries to save a newly created record, they'll get a validation error if they haven't filled in the Content box. This is handy to remind folks to add an Abstract, for example.

Resource record template basic information defaults

- Level of Description => Collection (could also set this as default in controlled value list: Archival Record Level)
- Language => English (from controlled value list)
- Publish => Checked (from Preferences)

We have set up a template for Resource records. The template combined with the defaults we've set in the Controlled Value List result in the following fields being pre-populated when we create a new resource record.

In the Basic Information section:

Level of Description => Collection (could also set this as default in controlled value list:
Archival Record Level)
Language => English (from controlled value list)
Publish => Checked (from Preferences)

Resource record template Extents and Finding Aid Data defaults

- Extents Portion => Whole (from controlled value list)
- Extents Type => linear feet (from controlled value list)
- Description Rules => Describing Archives: A Content Standard (from controlled values)
- Language of Description => Finding aid written in English

In the Extents section
Extents Portion => Whole (from controlled value list)
Extents Type => linear feet (from controlled value list)

In the Finding Aid data section
Description Rules => Describing Archives: A Content Standard (from controlled values)
Language of Description => Finding aid written in English

In the Notes section:
Abstract => blank field
Conditions Governing Access => No access restrictions
Conditions Governing Use => Spencer Library staff may determine use restrictions dependent on the physical condition of manuscript materials.
Immediate Source of Acquisition => blank field
Physical Location => blank field

Example

When a record is spawned, the values from the controlled value list are added but the template information is not applied. You should also note that the value from the Publish field in the Accession record will be applied to the resource record, regardless of what you have in your preferences. New fields you add to the resource record like adding a note, will have the Publish value of whatever you have set as your default.

We have created macros to supply the same content that is found in the template data and we have some macros that help staff step through filling out some additional fields.

We use MacroExpress which can be found at: http://www.wintools.com/
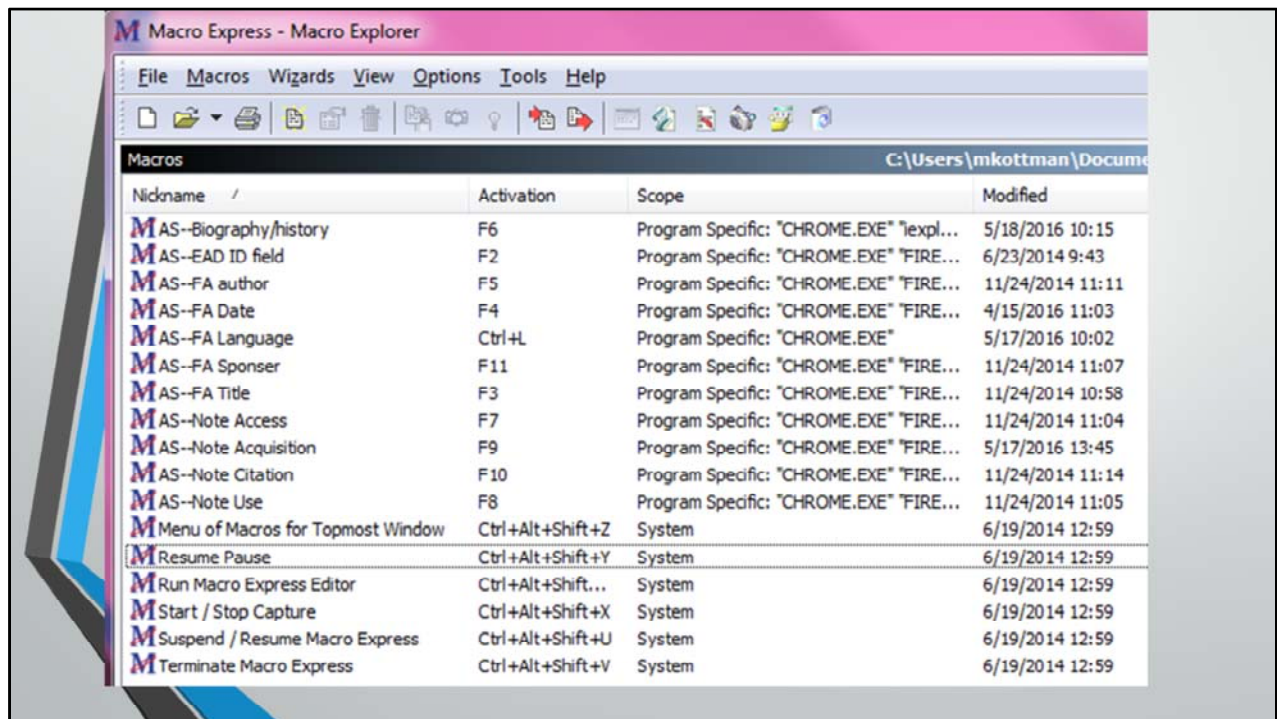
Here's a list of the macros we've created: Biography, EAD ID field, the author, date, title and sponsor field in the Finding Aid section. The Language macro would only need to be used on spawned records since it's in the template for new records. For notes, there's the Access and Use restriction notes for use on spawned records. The immediate source of acquisition and preferred citation macros are step throughs that help staff enter data in a standardized manner.

### Example: Immediate Source of Acquisition note

- Add Note => Select Note Type => Click in the Content field => Launch macro
- Immediate Source of Acquisition => Click in Content => F9
  - Choose: Gift, Purchase, Other
  - Enter name of donor
  - Enter date of acquisition

Here's an example of a step through macro for the immediate source of acquisition note: For spawned records, you would click on Add Note, then Select Immediate Source of Acquisition as the Note Type and then click to put your cursor in the Content field. For newly created resource records, the note already exists so you'd just need to add a Content section and then put your cursor in it. Press F9, the hotkey assigned to this macro to start it.
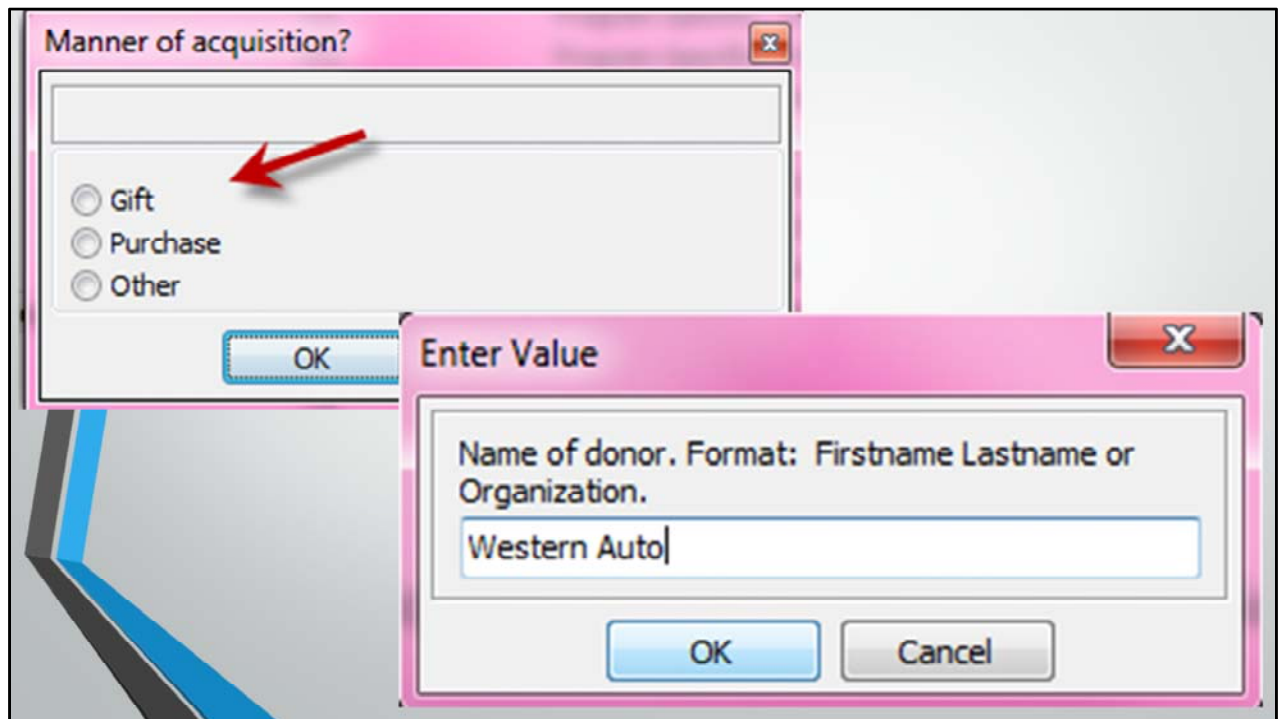
A box opens asking you to Choose: Gift, Purchase, Other.
After clicking the OK button or pressing <enter> key , another box pops up asking for the name of the donor
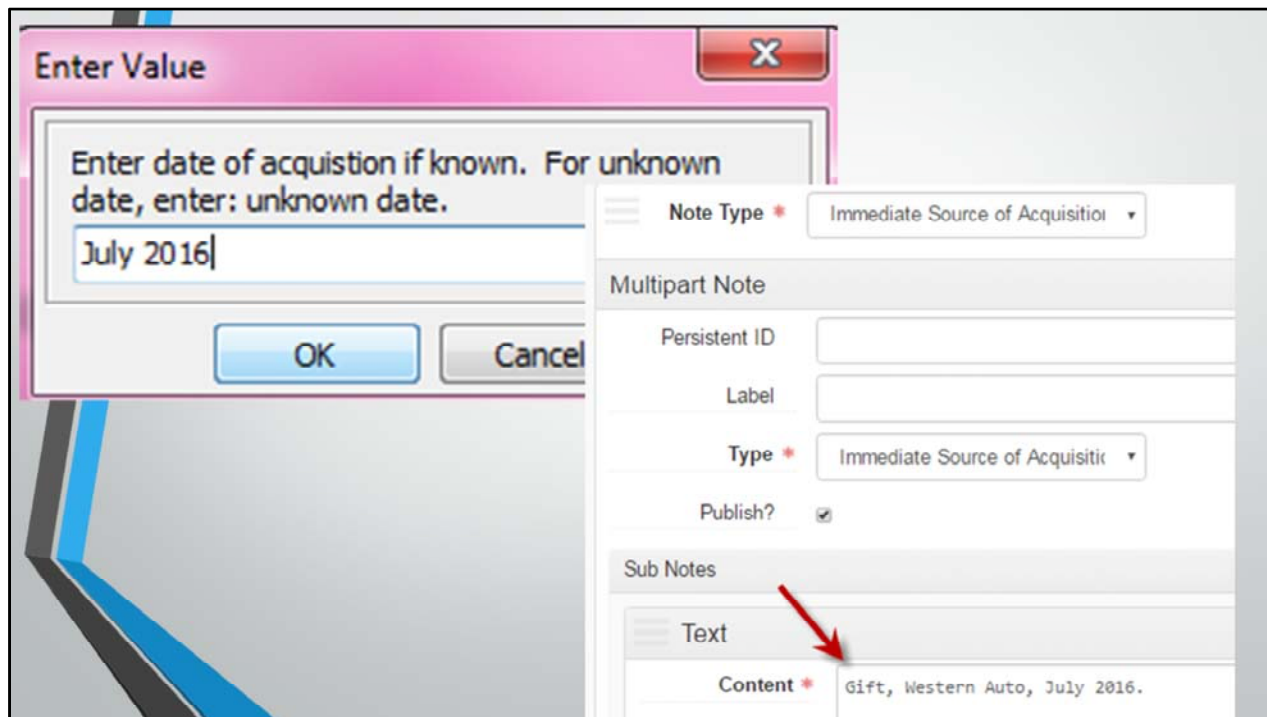
The final box asks for the date of acquisition

The macro then enters the information into the Content field. The first part of the note is based on what you selected in the first step. If you select Other, a box will ask you to enter the manner of acquisition which will then used in the note.
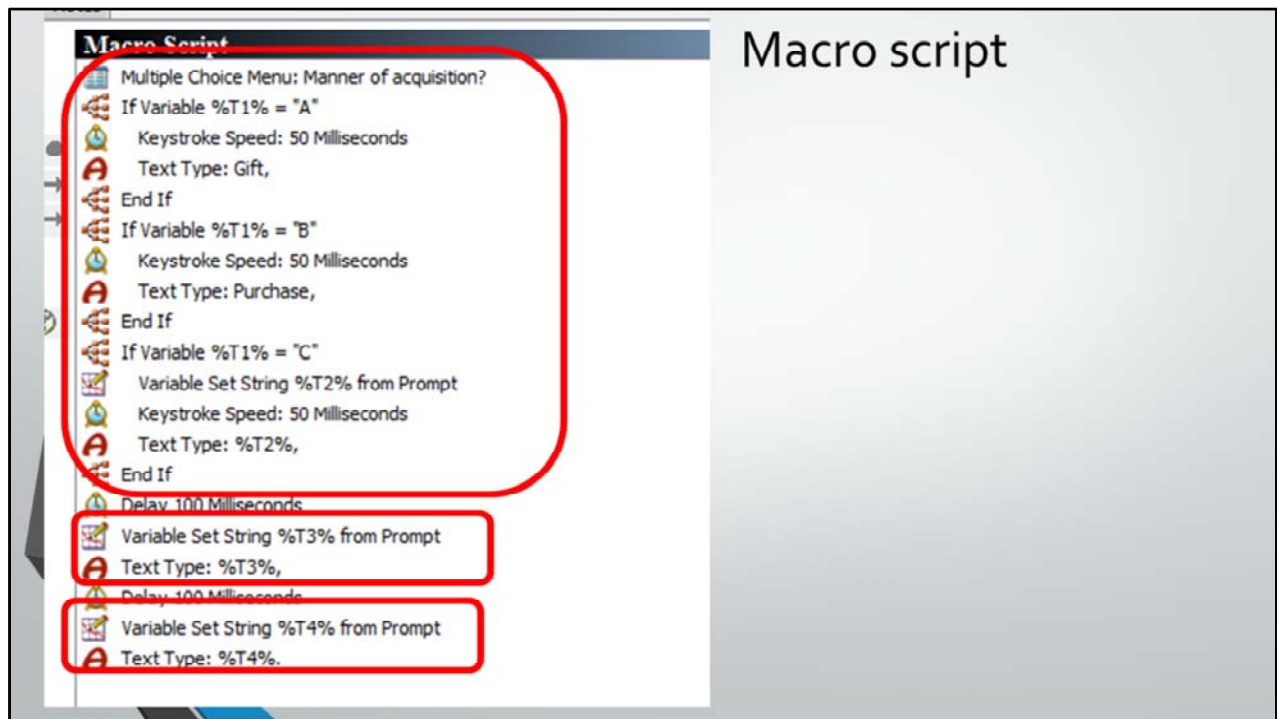
Macro script

This is what the macro script looks like in Macro Express. The first section captures what choice was made in the manner of acquisition box, i.e. gift, purchase, other and pastes into the Content box followed by a comma

The middle section pops up the box to solicit the donor information and saves the value to a variable which it then types into the Content box followed by a comma

The final section asks for the date, saves it to a variable and then types it into the Content box followed by a period.

Another option for entering standardized text

- 3D Clipboard => http://www.3dclipboard.com/
- Free clipboard manager utility for Windows that keeps track of the items you copy to the clipboard. allowing you to access them later
- Can create "Sticky items" and assign to hotkeys
- "Actions" are an advanced feature of 3D Clipboard that allow you to write scripts that manipulate items on the 3D Clipboard menu

Another FREE option you can use to enter text strings is 3D Clipboard. I primarily use it because it remembers the last 15 or so things you copied. This program will allow you to select something you previously copied and set it to your clipboard.
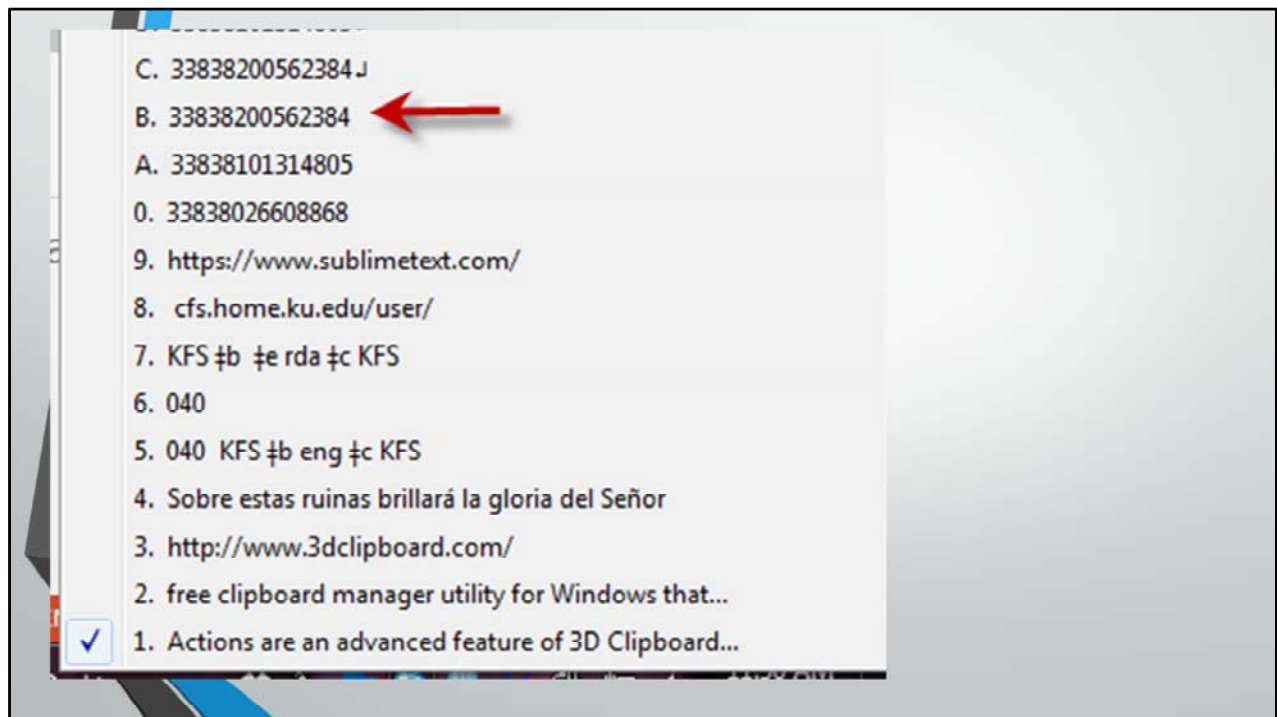
The text currently in my clipboard is the one with the check in front.
I can click on one of the barcodes I copied earlier which puts it into my clipboard so I can paste it into a search.
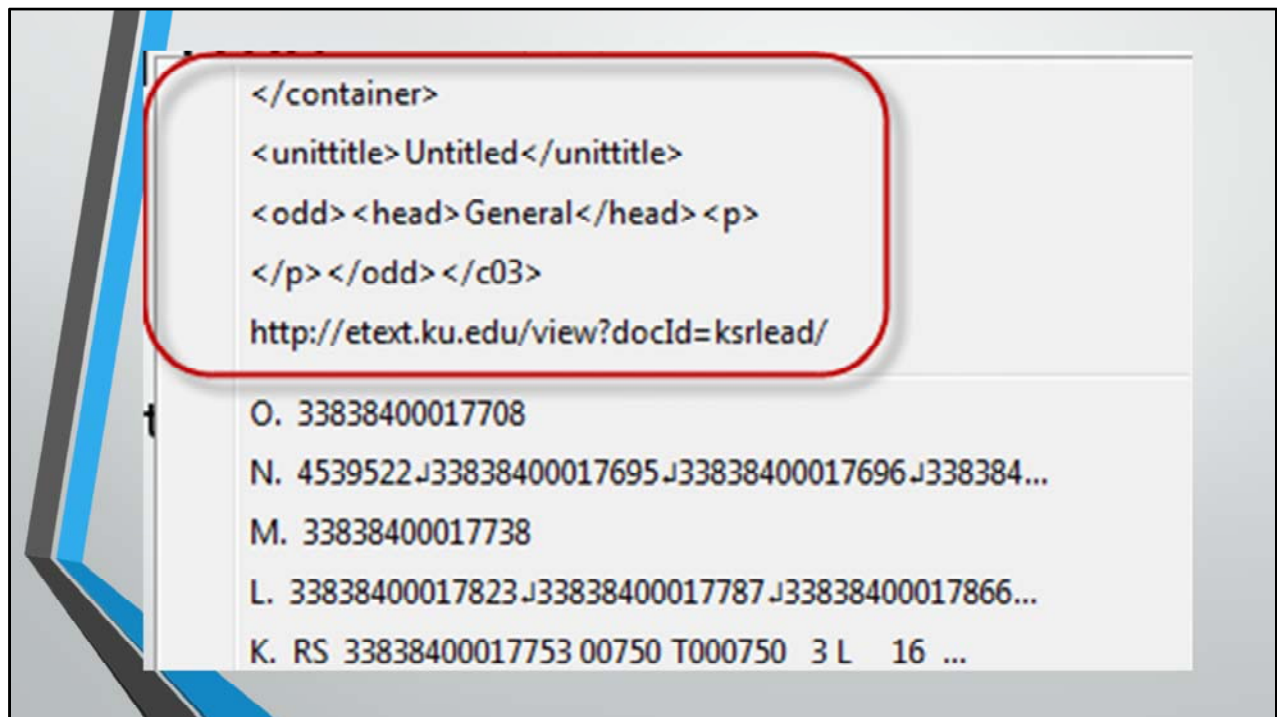
The program also lets you set up "Stickies" of text strings which stay on the menu, i.e . The stuff above the horizontal line You can also assign hotkeys to the stickie text strings. It is also possible to create scripts to manipulate items on the menu but I haven't bothered to experiment with it.

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