

Adding in (some of) the Missing Pieces in ArchivesSpace

Mostly the search bits!

But also some other stuff.

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Moving to ArchivesSpace

- We went live a little over a year ago to the day – July 29th
- We were using a homegrown Filemaker Database
- We've got about ½ million objects in the database
 - 500k Archival Objects
 - 3k Resources
 - 5k Accessions
 - 25k Containers
 - 13k Locations
- Data includes sensitive material like FERPA, HIPPA, personnel, etc – what Dartmouth calls DISC level 3 data. But its really only the descriptive metadata about that type of data, so let's call it level 2.5. This will be **important** later on!

A looong list of the Plugins

- OnBase Integration
- Records Management Ingest
- SSO integration
- Accession Snapshot
- Accession Identifiers
- Additional Contact Details
- User Defined in Basic
- Payments module
- UDF Exports (MARC & EAD)
- Container Management – Label printing
- Custom Reports
- UI Customizations

The Usual Search Results

Home / Search for ***

Filtered By [Clear All](#)

- Text: * [×](#)
- Record Type: Archival Object [×](#)

Search Results

Showing 1 - 92 of 92 Results Sort by: Relevance [▼](#)

Record Type	Title		
Archival Object	Adrian Preparative Meeting of Friends (Hicksite : Adrian, Mich.)	Created by admin 2016-08-01 11:15:35 -0700 Last Modified by admin 2016-08-01 11:15:35 -0700	View Edit
Archival Object	Battle Creek Monthly Meeting of Friends (Hicksite : Battle Creek, Mich.)	Created by admin 2016-08-01 11:15:36 -0700 Last Modified by admin 2016-08-01 11:15:36 -0700	View Edit
Archival Object	Scipio Half Yearly Meeting of Friends (Hicksite : 1918-24: Cayuga County, N.Y.)	Created by admin 2016-08-01 11:15:36 -0700 Last Modified by admin 2016-08-01 11:15:36 -0700	View Edit
Archival Object	Genesee Yearly Meeting of Friends (Hicksite : Farmington, N.Y.)	Created by admin 2016-08-01 11:15:36 -0700	View Edit

What happens when we want to add more stuff – columns, facets, buttons?

- We wanted an easy way to view additional metadata about a particular result – like the **resource id** (call number) the **context** (what the parent hierarchy looks like) and the **location** (because mostly we want to fetch this thing for a patron). So let's add columns and more buttons.
- But what about more **facets**? We want to know what type of Archival Object we are looking at.
- Rinse and repeat until we get a mess. Too many columns and a cluttered UI.

The Usual Search Results With Additions = CLUTTER!

Home / Search for ""

Filtered By [Clear All](#)

- Text: * ✕
- Record Type: Archival Object ✕

*

Search Results

Showing 1 - 92 of 92 Results Sort by: Relevance ▾

Record Type	Title	Level	Call Number	Collection Type	Catalog Location		
Archival Object	Adrian Preparative Meeting of Friends (Hicksite : Adrian, Mich.) <small>File: 30 Box: 25 Rauner, UGS [Range: 65, Bank: E, Shelf: 2]</small>	File	MS-101	Archives	Manuscripts - WMAN	Created by admin 2016-08-01 11:15:35 -0700 Last Modified by admin 2016-08-01 11:15:35 -0700	View Edit Add to Cart Location
Archival Object	Battle Creek Monthly Meeting of Friends (Hicksite : Battle Creek, Mich.)	File	MS-101	Archives	Manuscripts - WMAN	Created by admin 2016-08-01 11:15:36 -0700 Last Modified by admin 2016-08-01 11:15:36 -0700	View Edit
Archival Object	Scipio Half Yearly Meeting of Friends (Hicksite : 1918-24: Cayuga County, N.Y.)	File	MS-101	Archives	Manuscripts - WMAN	Created by admin 2016-08-01 11:15:36 -0700 Last Modified by admin 2016-08-01 11:15:36 -0700	View Edit
Archival Object	Scipio Yearly Meeting of Friends (Hicksite : Cayuga County, N.Y.)	File	MS-101	Archives	Manuscripts - WMAN	Created by admin 2016-08-01 11:15:36 -0700 Last Modified by admin 2016-08-01 11:15:36 -0700	View Edit

Taking some Cues from the New Public UI (and Google)

Collection item title

 **Collection** | **Identifier:** ABCDEFGHIJKL

Maecenas faucibus mollis **astronomy**. Maecenas sed diam eget risus varius blandit sit amet non magna. Vestibulum id ligula porta semper.

Date(s): 1903-1943

Context: [Repository name](#)

+ Search terms in context

Subject **astronomy** item title

 **Subject**

Maecenas **Maria Mitchell** mollis interdum. Maecenas sed diam eget risus varius blandit sit amet non magna. Vestibulum id ligula porta semper.

Context: Appears in [123 records \(view all »\)](#)

Detailed record **Maria Mitchell** item title

 **Box 5 Folder 3** | **Identifier:** ABCDEFGHIJKL

Maecenas faucibus mollis interdum. **Maria Mitchell** sed diam eget risus varius blandit sit amet non magna. Vestibulum id ligula porta semper.

Date(s): c. 1943

Context: [Repository name](#) / [Collection title](#) / [Series 1: title](#) / [Subseries 3C:](#)



digitized material available

Dates to include ⓘ

Start year

to

End year

Filter

Additional filters ⓘ

Sort filters by:

of records

Alphabetically

Subjects # of records

Art critics 15

Blacklisting 3

Category 2 # of records

Facets will go on 44

Changing up the Results

Search results for "mackaye":

- Level
 - File 5424
 - box 400
 - Series 32
 - Collection 6
 - Item 2
- Call Number
 - ML-5: MacKaye Family papers 5813
 - CF-ML-5: Mackaye Papers Collection Files 5
 - DL-4: Dartmouth College, Library Administration records 5
 - MS-608: Loring MacKaye papers 5
 - MS-969: Paul Bryant papers 5
 - More Call Numbers +
- Collection Group

Main results:

- File** **MACKAYE BENTON** [Edit](#) [Add to Cart](#)
Restrictions may apply at the file level.
Call Number: DA-640: Dartmouth College, Gift Planning records
Collection Type: Archives
Context: Dartmouth College, Gift Planning records
 - ↳ Series: RECORDS CONCERNING EXPECTANCIES
 - ↳ Box: A - W
 - ↳ File: MACKAYE BENTON**Location:** Box:9653, Records Center, RecordsManagement [REDACTED]

- Person** **MacKaye, Loring** [Edit](#)
Date(s): 1890 - 1972
- Person** **MacKaye, Percy** [Edit](#)
Date(s): 1875 - 1956
- Family** **MacKaye Family** [Edit](#)
- File** **Photographs MacKaye Family: Arthur MacKaye and Helen MacKaye, 1930** [Edit](#) [Add to Cart](#)
Date(s): 1930
Call Number: ML-5: MacKaye Family papers

With some Buttons Remaining

The screenshot shows a search results interface. On the left, there is a sidebar with filters: 'Filtered By' (Text: mackaye), 'Level' (File: 5424, box: 400, Series: 32, Collection: 6, Item: 2), and 'Call Number' (ML-5: MacKaye Family). The main content area is titled 'Search Results' and shows 'Showing 1 - 10 of 6292 Results'. A search bar contains 'mackaye'. The first result is for 'MACKAYE BENTON' with an 'Edit' button. A yellow banner reads 'Restrictions may apply at the file level.' Below this, details include 'Call Number: DA-649: Dartmouth College, Gift Planning records', 'Collection Type: Archives', and 'Context: Dartmouth College, Gift Planning records'. A breadcrumb trail shows 'Series: RECORDS CONCERNING EXPECTANCIES', 'Box: A - W', and 'File: MACKAYE BENTON'. A location field shows 'Box:9653, Records Center, RecordsManagement'. A red circle highlights the 'Add All', 'Add to Cart', and 'Add with Children' buttons in the top right of the result card.

Filtered By [Clear All](#)

- Text: mackaye ✕

mackaye

Level

- File 5424
- box 400
- Series 32
- Collection 6
- Item 2

Call Number

- ML-5: MacKaye Family

Search Results

Showing 1 - 10 of 6292 Results

File [MACKAYE BENTON](#)

Restrictions may apply at the file level.

Call Number: DA-649: Dartmouth College, Gift Planning records
Collection Type: Archives
Context: Dartmouth College, Gift Planning records

↳ Series: RECORDS CONCERNING EXPECTANCIES
↳ Box: A - W
↳ File: MACKAYE BENTON

Location: Box:9653,
Records Center, RecordsManagement

Sort by:

What does that Cart Thing Do?

ArchivesSpace

Home / Top Containers

Top Containers

Checkout

Empty the Cart

Your Cart

Resource ID	Resource Title	Series Title	Box #	Box Title	File #	File Component Title	Item Component Title	
ML-5	MackKaye Family papers	Addendum 1, 1861-1953]	253	Steele MacKaye: Scrapbook: Telegrams from Steele MacKaye, 1878 - 1894	-	-	-	View
ML-5	MackKaye Family papers	Addendum 4, 1884 - 1999	378	Steele Mackaye, Robert (Robin) Keith MacKaye, William Payson Mackaye, Marion Morse MacKaye, Perc..., undated	-	-	-	View
ML-5	MackKaye Family papers	Addendum 4, 1884 - 1999	378	Steele Mackaye, Robert (Robin) Keith MacKaye, William Payson	1	Steele Mackaye: Oil painting (France?), undated	-	View

And You get a Report too!

Resource Title	Resource ID	Agent Name (creator)	Series Title	Series Dates	Box Title	Box Number	Box Dates	Box
MacKaye Family papers	ML-5	MacKaye Family	Addendum 4	Creation: 1884 - 1999	Steele Mackaye, Robert (Robin) Keith MacKaye, William Payson Mackaye, Marion Morse MacKaye, Perc...	378	Creation: undated	Bak
MacKaye Family	ML-5	MacKaye Family	Addendum 4	Creation: 1884 - 1999	Steele Mackaye, Robert (Robin) Keith	378	Creation: undated	Bak

Caveats (for the moment)

- Very much dependent on our **initial** hierarchy
- Expects a strict hierarchy – no skips & “boxes” – yeah don’t go there.
- On my ToDo list to make it hierarchy agnostic.
- Maybe change the report format?

					Morse MacKaye, Perc...			
MacKaye Family papers	ML-5	MacKaye Family	Addendum 4	Creation: 1884 - 1999	Steele Mackaye, Robert (Robin) Keith MacKaye, William Payson Mackaye, Marion Morse MacKaye, Perc...	378	Creation: undated	Bak
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Code Snippets – But Not a Lot of Them

```
class CommonIndexer
  add_attribute_to_resolve('resource')
  add_indexer_initialize_hook do |indexer|

    indexer.add_document_prepare_hook {|doc, record|
      if record['record']['jsonmodel_type'] == 'archival_object'

        resource = record['record']['resource']['_resolved']

        ao_restrictions = record['record']['restrictions_apply']

        doc['total_restrictions_u_sstr'] = ao_restrictions

        call_number = (0..3).map{|i| resource["id_#{i}"]}.compact.join(".")

        doc['resource_identifier_u_sstr'] = call_number

        if record['record']['jsonmodel_type'] == 'resource'
          resource_restrictions = record['record']['restrictions']
          doc['total_restrictions_u_sstr'] = resource_restrictions

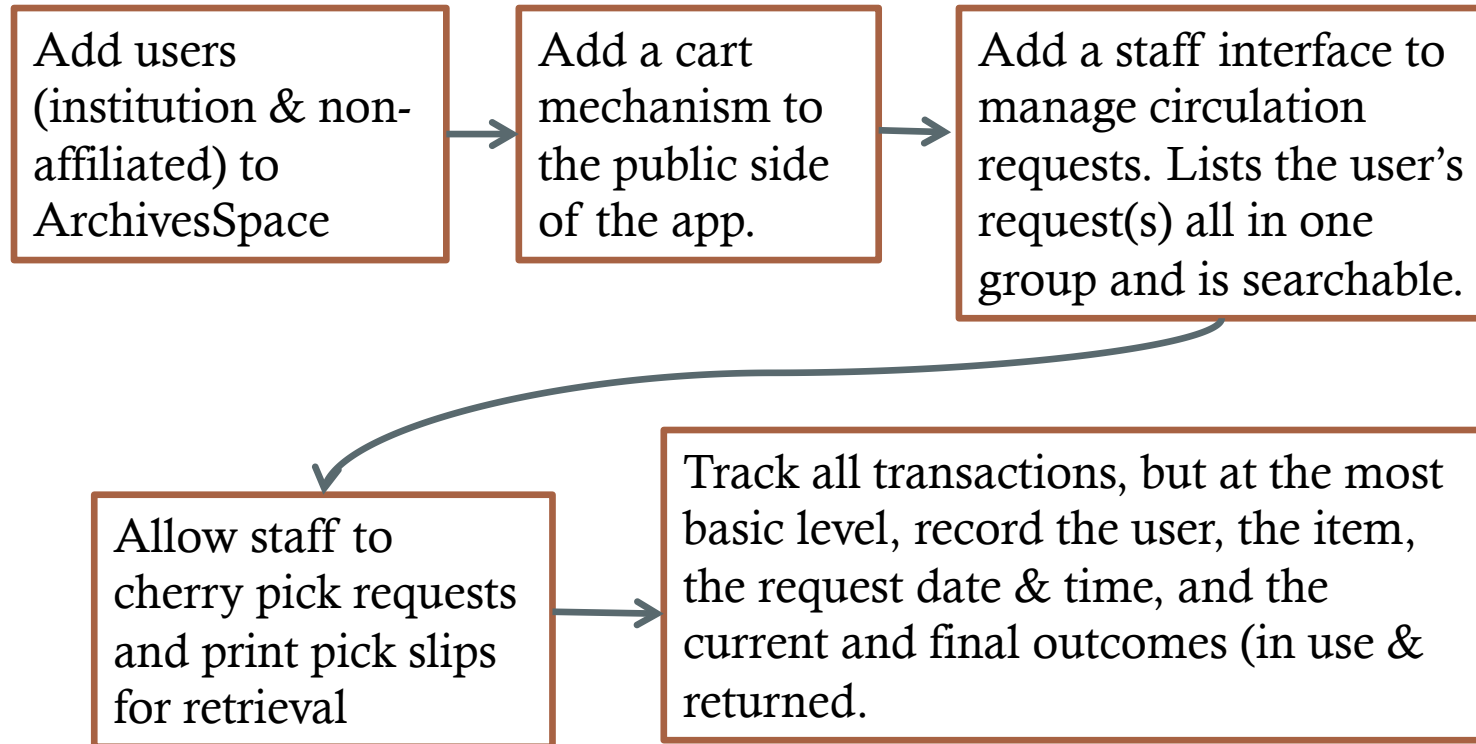
          call_number = (0..3).map{|i| record["record"]["id_#{i}"]}.compact.join(".")
          doc['resource_identifier_u_sstr'] = call_number
          doc['resource_identifier_u_sort'] = (0..3).map{|i| (record["record"]["id_#{i}"] || "").to_s.rjust(25, '#')}.join
          doc['resource_identifier_w_title_u_sstr'] = call_number + "; " + record['record']['title']
        }
      }
    }
  end
end

indexer.add_document_prepare_hook {|doc, record|
  if record['record']['jsonmodel_type'] == 'accession'
    accession_number = (0..3).map{|i| record["record"]["id_#{i}"]}.compact.join("-")
    unless record['record']['display_string'] == accession_number
      doc['title'] += "; #{accession_number}"
    end
  end
}
end
```


Thoughts about Circulation

- We've got a lot of data that needs to stay in ArchivesSpace (or some other secured application)
- This data won't ever see the light of day – at least the public light of day for a looooong time.
- So.... Maybe build a circulation plugin that we can share with the community

A Basic Workflow for Circulation



Questions?

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Rauner Special Collections Library

Dartmouth College