



XLS → XML → EAD → CSV

Spreadsheet to Finding Aid and Back

Spreadsheet to Finding Aid and Back

- Share basic workflows
 - Create and modify container lists (XLS)
 - Ingest lists into ArchivesSpace (XML)
 - Format HTML for public display (EAD)
 - Export lists from ArchivesSpace to spreadsheets (CSV)

XLS – Container List Template

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW ACROBAT

Christensen, Marlayna

Clipboard Font Alignment Number Styles Cells Editing

Calibri 11 A A B I U Wrap Text Merge & Center General \$ % , .00 .00 Conditional Formatting Format as Table Cell Styles Insert Delete Format Sort & Filter Find & Select

I11

	A	B	C	D	E	F	G	H	I	J	K
1	Level Type	Level	Title	Date	Box	Folder	DF	Oversize	Instance	General Note	Restrictions
2											
3											
4											
5											
6											
7											
8											

Microsoft Excel ribbon: FILE, HOME, INSERT, PAGE LAYOUT, FORMULAS, DATA, REVIEW, VIEW, ACROBAT. User: Christensen, Marlayna.

Clipboard: Paste

Font: Calibri, 11, Bold (B), Italic (I), Underline (U), Color, Background Color, Paragraph (bullets, indent), Font Color (A)

Alignment: Wrap Text, Merge & Center

Number: General, Currency (\$), Percentage (%), Decimals (←.0, .00, →.0)

Styles: Conditional Formatting, Format as Table, Cell Styles

Cells: Insert, Delete, Format

Editing: Sort & Filter (Σ, A-Z), Find & Select (magnifying glass, list)

Formula Bar: I11, X, ✓, fx

1	A	B	C	D	E	F	G	H	I	J	K
	Level Type	Level	Title	Date	Box	Folder	DF	Oversize	Instance	General Note	Restrictions
2											
3											
4											
5											
6											
7											
8											

Collection, series, subseries, file, item

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW ACROBAT Christensen, Marlayna

Paste Clipboard Font Alignment Number Styles Cells Editing

Calibri 11 A A B I U Wrap Text Merge & Center General \$ % .00 .00 Conditional Formatting Format as Table Cell Styles Insert Delete Format Sort & Filter Find & Select

I11 X ✓ fx

	A	B	C	D	E	F	G	H	I	J	K
1	Level Type	Level	Title	Date	Box	Folder	DF	Oversize	Instance	General Note	Restrictions
2											
3											
4											
5											
6											
7											
8											

Up to eight levels

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW ACROBAT Christensen, Marlayna

Paste Clipboard Font Alignment Number Styles Cells Editing

Calibri 11 A A Wrap Text Merge & Center General \$ % , ←.0 .00 →.0 Conditional Formatting Format as Table Cell Styles Insert Delete Format Sort & Filter Find & Select

I11 : X ✓ fx

	A	B	C	D	E	F	G	H	I	J	K
1	Level Type	Level	Title	Date	Box	Folder	DF	Oversize	Instance	General Note	Restrictions
2											
3											
4											
5											
6											
7											
8											

Free text, no character limits

Microsoft Excel ribbon: FILE, HOME, INSERT, PAGE LAYOUT, FORMULAS, DATA, REVIEW, VIEW, ACROBAT. User: Christensen, Marlayna.

Formulas bar: I11

	A	B	C	D	E	F	G	H	I	J	K
1	Level Type	Level	Title	Date	Box	Folder	DF	Oversize	Instance	General Note	Restrictions
2											
3											
4											
5											
6											
7											
8											

DACS-compliant dates, free text.

Microsoft Excel ribbon: FILE, HOME, INSERT, PAGE LAYOUT, FORMULAS, DATA, REVIEW, VIEW, ACROBAT. User: Christensen, Marlayna.

Formula bar: I11

	A	B	C	D	E	F	G	H	I	J	K
1	Level Type	Level	Title	Date	Box	Folder	DF	Oversize	Instance	General Note	Restrictions
2											
3											
4											
5											
6											
7											
8											

DACS-compliant dates, free text.
NOT for collections, series, or subseries.

Microsoft Excel ribbon: FILE, HOME, INSERT, PAGE LAYOUT, FORMULAS, DATA, REVIEW, VIEW, ACROBAT. User: Christensen, Marlayna.

Clipboard: Paste

Font: Calibri, 11, Bold (B), Italic (I), Underline (U), Color, Background Color

Alignment: Wrap Text, Merge & Center

Number: General, \$, %, .00, .00

Styles: Conditional Formatting, Format as Table, Cell Styles

Cells: Insert, Delete, Format

Editing: Sort & Filter, Find & Select

Formula Bar: I11, X, ✓, fx

	A	B	C	D	E	F	G	H	I	J	K
1	Level Type	Level	Title	Date	Box	Folder	DF	Oversize	Instance	General Note	Restrictions
2											
3											
4											
5											
6											
7											
8											

Numbers

Microsoft Excel ribbon: FILE, HOME, INSERT, PAGE LAYOUT, FORMULAS, DATA, REVIEW, VIEW, ACROBAT. User: Christensen, Marlayna.

Clipboard: Paste

Font: Calibri, 11, Bold (B), Italic (I), Underline (U), Color, Background Color

Alignment: Wrap Text, Merge & Center

Number: General, \$, %, ', .0, .00, →.0

Styles: Conditional Formatting, Format as Table, Cell Styles

Cells: Insert, Delete, Format

Editing: Sort & Filter, Find & Select

Formula Bar: I11, X, ✓, fx

	A	B	C	D	E	F	G	H	I	J	K
1	Level Type	Level	Title	Date	Box	Folder	DF	Oversize	Instance	General Note	Restrictions
2											
3											
4											
5											
6											
7											
8											

Numbers – single digit or span

Microsoft Excel ribbon: FILE, HOME, INSERT, PAGE LAYOUT, FORMULAS, DATA, REVIEW, VIEW, ACROBAT. User: Christensen, Marlayna.

Formulas bar: I11

	A	B	C	D	E	F	G	H	I	J	K
1	Level Type	Level	Title	Date	Box	Folder	DF	Oversize	Instance	General Note	Restrictions
2											
3											
4											
5											
6											
7											
8											

Number – single digit;
Used with Instance Type *digital*

Microsoft Excel ribbon: FILE, HOME, INSERT, PAGE LAYOUT, FORMULAS, DATA, REVIEW, VIEW, ACROBAT. User: Christensen, Marlayna.

Clipboard: Paste

Font: Calibri, 11, Bold (B), Italic (I), Underline (U), Color, Background Color

Alignment: Wrap Text, Merge & Center

Number: General, \$, %, ', Left, Right, Center, Decrease, Increase

Styles: Conditional Formatting, Format as Table, Cell Styles

Cells: Insert, Delete, Format

Editing: Sum, Sort & Filter, Find & Select

Formula Bar: I11, X, ✓, fx

	A	B	C	D	E	F	G	H	I	J	K
1	Level Type	Level	Title	Date	Box	Folder	DF	Oversize	Instance	General Note	Restrictions
2											
3											
4											
5											
6											
7											
8											

Numbers or alpha-numeric

Microsoft Excel ribbon: FILE, HOME, INSERT, PAGE LAYOUT, FORMULAS, DATA, REVIEW, VIEW, ACROBAT. User: Christensen, Marlayna.

Clipboard: Paste

Font: Calibri, 11, Bold (B), Italic (I), Underline (U), Color, Background Color

Alignment: Wrap Text, Merge & Center

Number: General, \$, %, .00, .00

Styles: Conditional Formatting, Format as Table, Cell Styles

Cells: Insert, Delete, Format

Editing: Sort & Filter, Find & Select

Formula Bar: I11, X, ✓, fx

	A	B	C	D	E	F	G	H	I	J	K
1	Level Type	Level	Title	Date	Box	Folder	DF	Oversize	Instance	General Note	Restrictions
2											
3											
4											
5											
6											
7											
8											

Leave blank;
default *mixed materials* added with script

Microsoft Excel ribbon: FILE, HOME, INSERT, PAGE LAYOUT, FORMULAS, DATA, REVIEW, VIEW, ACROBAT. User: Christensen, Marlayna.

Clipboard: Paste

Font: Calibri, 11, Bold (B), Italic (I), Underline (U), Color, Background Color, Paragraph (bullets, indent), Font Color (A)

Alignment: Wrap Text, Merge & Center

Number: General, Currency (\$), Percentage (%), Decimals (←.0, .00, →.0)

Styles: Conditional Formatting, Format as Table, Cell Styles

Cells: Insert, Delete, Format

Editing: Sum, Sort & Filter (AZ), Find & Select

Formula Bar: I11, X, ✓, fx

	A	B	C	D	E	F	G	H	I	J	K
1	Level Type	Level	Title	Date	Box	Folder	DF	Oversize	Instance	General Note	Restrictions
2											
3											
4											
5											
6											
7											
8											

Free text – used at the file level only

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW ACROBAT Christensen, Marlayna

Paste Clipboard Font Alignment Number Styles Cells Editing

Calibri 11 A A B I U Wrap Text Merge & Center General \$ % .0 .00 Conditional Formatting Format as Table Cell Styles Insert Delete Format Sort & Filter Find & Select

I11

	A	B	C	D	E	F	G	H	I	J	K
1	Level Type	Level	Title	Date	Box	Folder	DF	Oversize	Instance	General Note	Restrictions
2											
3											
4											
5											
6											
7											
8											

Free text – used

XLS – Container List

Level Type	Level	Title	Date	Box	Folder	DF	Oversize	Instance Type	General Note	Restrictions
collection	1	DEPARTMENT OF PHYSICAL EDUCATION INSTRUCTION								
series	2	Administrative Files								
file	3	Budget requests and allocations	1987-1992	2	32-33					
file	3	Correspondence	1987-1993	2	34-43					
file	3	Department mission statements	1990-1991	3	1					
file	3	Department program descriptions	1988-1992	3	2					
file	3	Department organizational chart	1990	3	3					
subseries	3	Departmental Reorganization								
		Ad hoc Committee on Organization of the Physical Education								
file	4	Department								
file	5	Correspondence	1987	3	4					
file	5	Meetings	1987	3	5					
file	5	Final report	1987	3	6					
file	4	Budget projections	1987	3	7					
file	4	Facilities proposals	1987-1989	3	8					
file	4	Reorganization meeting	1987	3	9				Meeting between the Department Chair and the Vice Chancellor for Academic Affairs.	
file	4	Reorganized staffing and department organization	1987	3	10					
file	4	Academic Senate discussions regarding the future of Department	1988-1989	3	11				Includes documentation of the issues leading up to the disestablishment of the Department of Physical Education.	

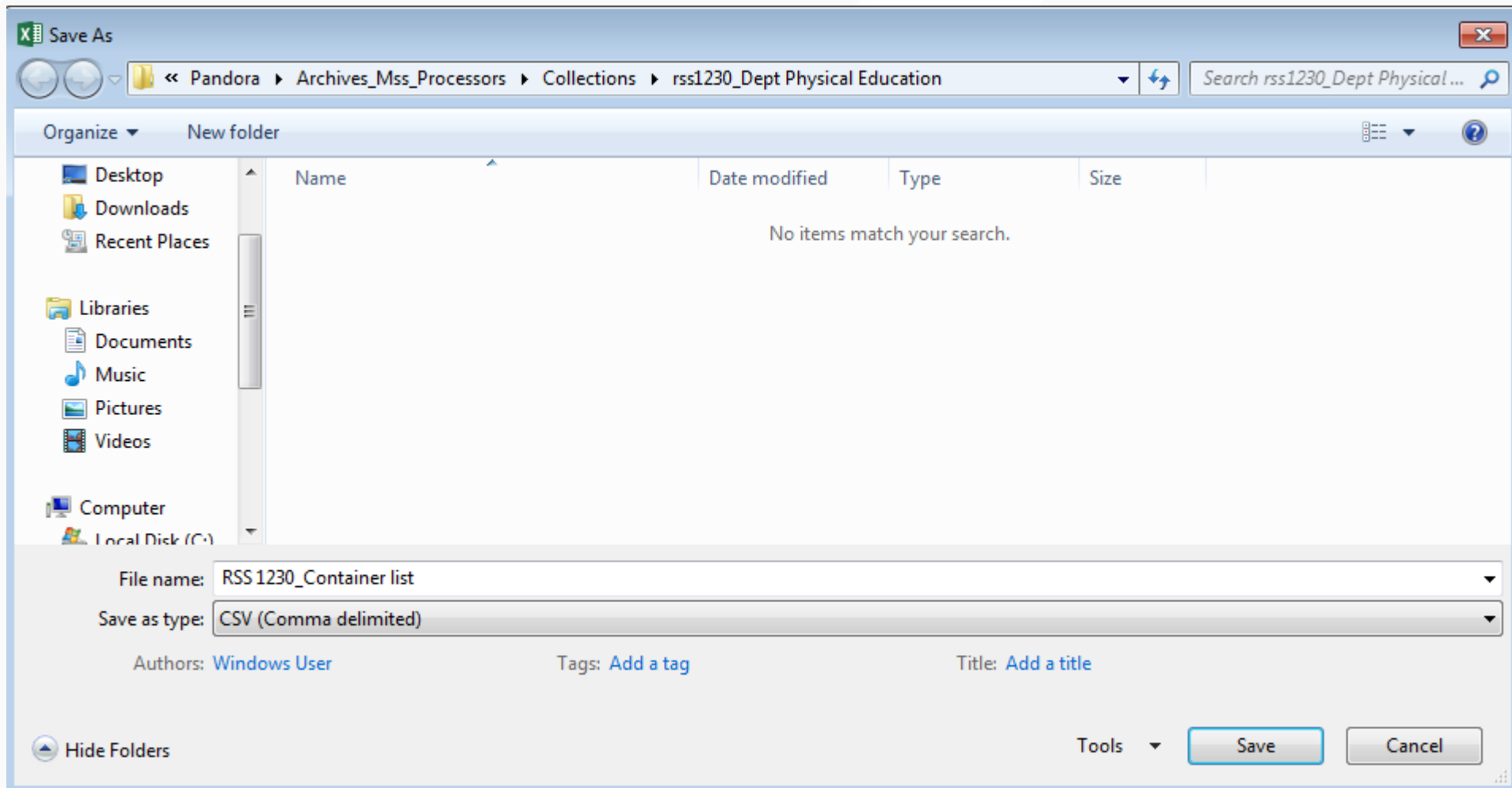
XLS → XML

Level Type	Level	Title	Date	Box	Folder	DF	Oversize	Instance Type
collection	1	DEPARTMENT OF PHYSICAL EDUCATION INSTRUCTION						
series	2	Administrative Files						
file	3	Budget requests and allocations	1987-1992	2	32-33			
file	3	Correspondence	1987-1993	2	34-43			
file	3	Department mission statements	1990-1991	3	1			
file	3	Department program descriptions	1988-1992	3	2			
file	3	Department organizational chart	1990	3	3			
subseries	3	Departmental Reorganization						
		Ad hoc Committee on Organization of the Physical Education						
file	4	Department						
file	5	Correspondence	1987	3	4			
file	5	Meetings	1987	3	5			
file	5	Final report	1987	3	6			
file	4	Budget projections	1987	3	7			
file	4	Facilities proposals	1987-1989	3	8			
								Meeting and the Affairs.
file	4	Reorganization meeting	1987	3	9			
file	4	Reorganized staffing and department organization	1987	3	10			
		Academic Senate discussions regarding the future of						
file	4	Department	1988-1989	3	11			Includes leading Departm

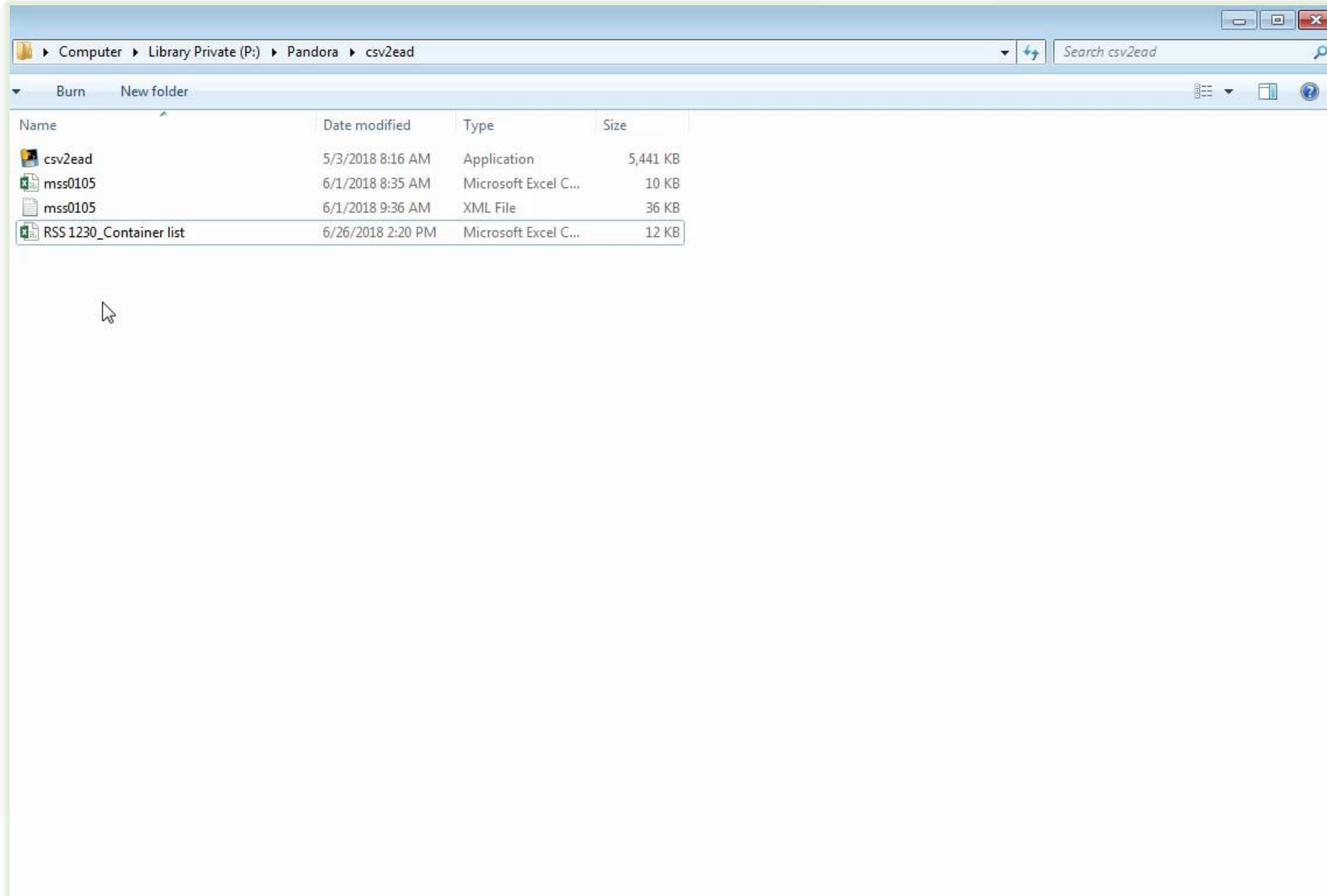
```

<c level="collection">
  <did>
    <unittitle>DEPARTMENT OF PHYSICAL EDUCATION INSTRUCTION</unittitle>
  </did>
  <c level="series">
    <did>
      <unittitle>Administrative Files</unittitle>
    </did>
    <c level="file">
      <did>
        <unittitle>Budget requests and allocations</unittitle>
        <container label="mixed materials" type="Box">2</container>
        <container type="Folder">32-33</container>
        <unitdate>1987-1992</unitdate>
      </did>
    </c>
    <c level="file">
      <did>
        <unittitle>Correspondence</unittitle>
        <container label="mixed materials" type="Box">2</container>
        <container type="Folder">34-43</container>
        <unitdate>1987-1993</unitdate>
      </did>
    </c>
    <c level="file">
      <did>
        <unittitle>Department mission statements</unittitle>
        <container label="mixed materials" type="Box">3</container>
        <container type="Folder">1</container>
        <unitdate>1990-1991</unitdate>
      </did>
    </c>
    <c level="file">
      <did>
        <unittitle>Department program descriptions</unittitle>
        <container label="mixed materials" type="Box">3</container>
        <container type="Folder">2</container>
        <unitdate>1988-1992</unitdate>
      </did>
    </c>
  </c>

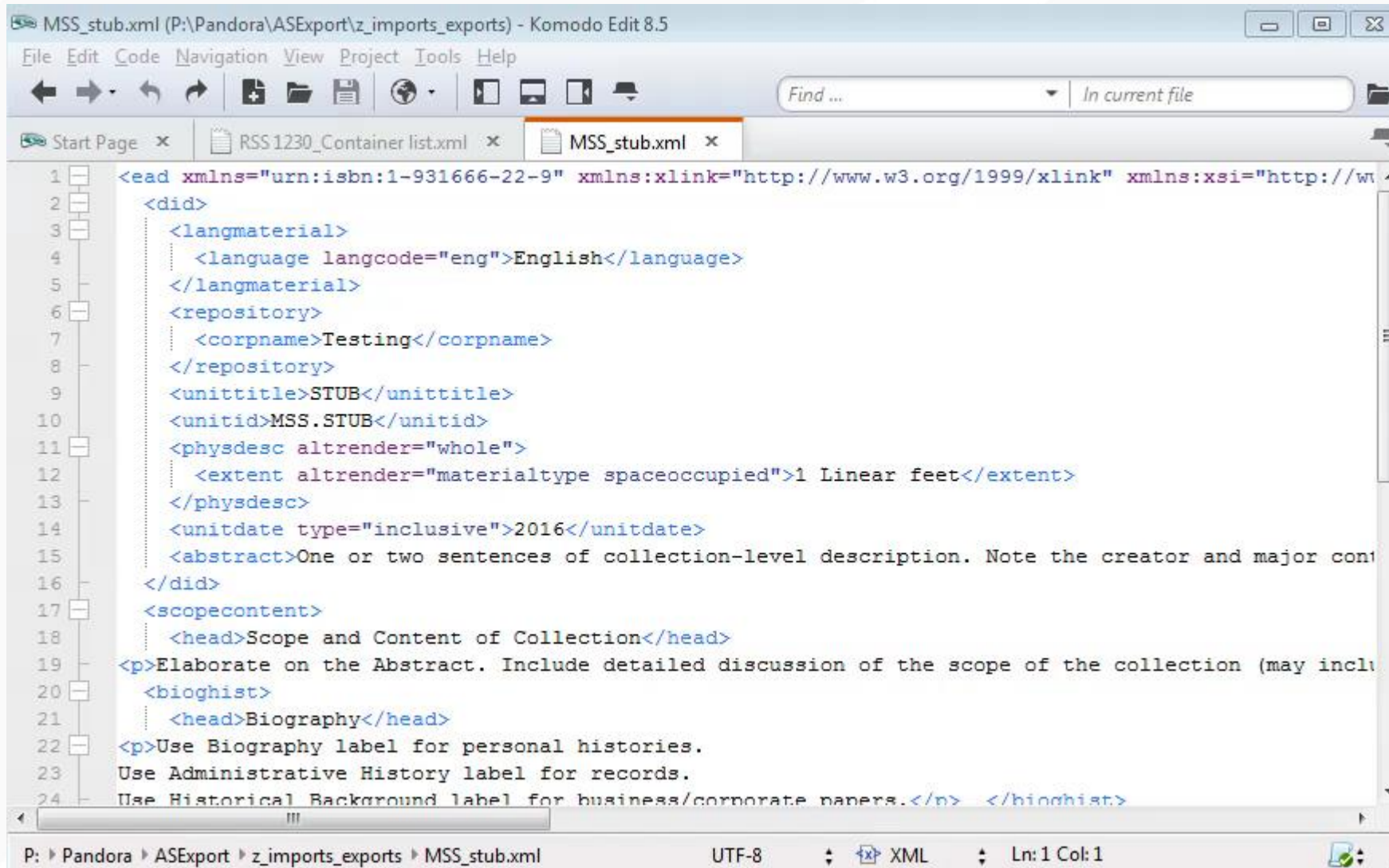
```



Transform XLS → XML



Prepare XML for Ingest



```
1 <ead xmlns="urn:isbn:1-931666-22-9" xmlns:xlink="http://www.w3.org/1999/xlink" xmlns:xsi="http://w
2 <did>
3 <langmaterial>
4 <language langcode="eng">English</language>
5 </langmaterial>
6 <repository>
7 <corpname>Testing</corpname>
8 </repository>
9 <unittitle>STUB</unittitle>
10 <unitid>MSS.STUB</unitid>
11 <physdesc altrender="whole">
12 <extent altrender="materialtype spaceoccupied">1 Linear feet</extent>
13 </physdesc>
14 <unitdate type="inclusive">2016</unitdate>
15 <abstract>One or two sentences of collection-level description. Note the creator and major cont
16 </did>
17 <scopecontent>
18 <head>Scope and Content of Collection</head>
19 <p>Elaborate on the Abstract. Include detailed discussion of the scope of the collection (may inclu
20 <bioghist>
21 <head>Biography</head>
22 <p>Use Biography label for personal histories.
23 Use Administrative History label for records.
24 Use Historical Background label for business/corporate papers.</p> </bioghist>
```

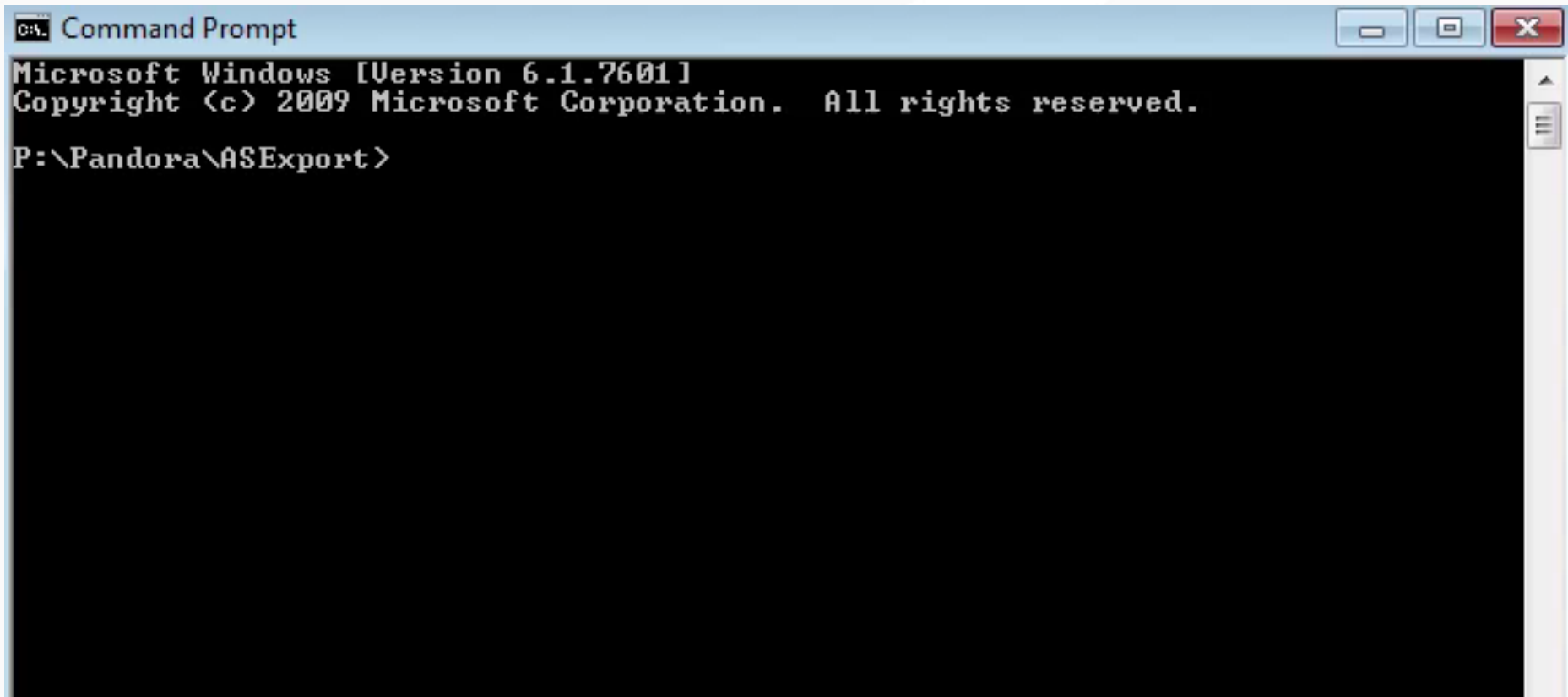
Import into ArchivesSpace

The screenshot displays the ArchivesSpace web interface. At the top left is the ArchivesSpace logo, a blue stylized 'A', with the text 'ArchivesSpace' and 'a community served by LYRASIS' below it. To the right of the logo is a navigation bar containing 'Select Repository', 'System', and a user profile dropdown for 'mkchristensen'. Below this is a secondary navigation bar with a home icon, 'Browse', 'Create' (with a mouse cursor hovering over it), a search box labeled 'Search All Records', and icons for 'SC&A', settings, and help. The main content area features a white box with the text 'Welcome to ArchivesSpace' and 'Your friendly archives management tool.' At the bottom right of the page, there is a footer link: 'Visit ArchivesSpace.org | v2.3.2 | Send Feedback or Report a Problem'.

Department of Physical Education. Administrative records	Collection
➤ DEPARTMENT OF PHYSICAL EDUCATION	Collection
▼ DEPARTMENT OF PHYSICAL EDUCATION INSTRUCTION	Collection
▼ ADMINISTRATIVE FILES	Series
Budget requests and allocations, 1987-1992	File mixed materials Box: 2, Folder: 32-33
Correspondence, 1987-1993	File mixed materials Box: 2, Folder: 34-43
Department mission statements, 1990-1991	File mixed materials Box: 3, Folder: 1
Department program descriptions, 1988-1992	File mixed materials Box: 3, Folder: 2
Department organizational chart, 1990	File mixed materials Box: 3, Folder: 3
▼ Departmental reorganization	Sub-Series
➤ Ad hoc Committee on Organization of the Physical Education D...	File
Budget projections, 1987	File mixed materials Box: 3, Folder: 7
Facilities proposals, 1987-1989	File mixed materials Box: 3, Folder: 8

Level Type	Level	Title	Date	Box	Folder	DF	Oversize	Instance Type	General Note	Restrictions
collection	1	DEPARTMENT OF PHYSICAL EDUCATION INSTRUCTION								
series	2	Administrative Files								
file	3	Budget requests and allocations	1987-1992	2	32-33					
file	3	Correspondence	1987-1993	2	34-43					
file	3	Department mission statements	1990-1991	3	1					
file	3	Department program descriptions	1988-1992	3	2					
file	3	Department organizational chart	1990	3	3					
subseries	3	Departmental Reorganization								
		Ad hoc Committee on Organization of the Physical Education								
file	4	Department								
file	5	Correspondence	1987	3	4					
file	5	Meetings	1987	3	5					
file	5	Final report	1987	3	6					
file	4	Budget projections	1987	3	7					
file	4	Facilities proposals	1987-1989	3	8					
file	4	Reorganization meeting	1987	3	9				Meeting between the Department Chair and the Vice Chancellor for Academic Affairs.	
file	4	Reorganized staffing and department organization	1987	3	10					
file	4	Academic Senate discussions regarding the future of Department	1988-1989	3	11				Includes documentation of the issues leading up to the disestablishment of the Department of Physical Education.	

ArchivesSpace → EAD



```
Command Prompt
Microsoft Windows [Version 6.1.7601]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

P:\Pandora\ASExport>
```

Finding Aid (EAD)

DEPARTMENT OF PHYSICAL EDUCATION INSTRUCTION

ADMINISTRATIVE FILES

Scope and Contents

Series 7) ADMINISTRATIVE FILES: Contains information pertaining to general departmental operations, and administrative particular interest are the files on the department's reorganization and eventual disestablishment. Arranged alphabetically.

Budget requests and allocations, 1987-1992

Request Box: 2 Folder: 32-33

Correspondence, 1987-1993

Request Box: 2 Folder: 34-43

Request Box 3

Department mission statements, 1990-1991

Request Box: 3 Folder: 1

Department program descriptions, 1988-1992

Request Box: 3 Folder: 2

Department organizational chart, 1990

Request Box: 3 Folder: 3

Departmental reorganization

Ad hoc Committee on Organization of the Physical Education Department

Correspondence, 1987

Request Box: 3 Folder: 4

ArchivesSpace → CSV

The screenshot displays the ArchivesSpace web interface. At the top, the ArchivesSpace logo is visible, along with navigation options like 'Browse', 'Create', and a search bar. The user is logged in as 'mikchristensen'. The main content area shows a list of records under the path 'Home / Resources / Department of Physical Education Records'. A 'Command Prompt' window is overlaid on the interface, showing the command 'P:\Pandora\ASExport >' entered. Below the list, there is a 'Basic Information' panel with the following details:

Title	Department of Physical Education Records
Identifier	RSS 1231
Level of Description	Collection
Resource Type	Records
Language	English
Publish?	True
Restrictions Apply?	False

At the bottom of the 'Basic Information' panel, it states: 'Created by mikchristensen 2018-06-26 15:04:52 -0700, Last Modified by mikchristensen 2018-06-26 15:04:52 -0700'. Below this is a 'Dates' section.



Thank you!

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(858) 534-8605