ArchivesSpace Record Creation Walkthroughs

Best Practices for Archives & Special Collections

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Add Event to an Accession or Resource in ArchivesSpace

Created by Angela Kroeger, last modified on Oct 01, 2014

When viewing or editing the Accession or Resource Record for which you plan to add an event:

Add Event (button on taskbar)

- Select Event type from drop menu
- Basic Information
- Outcome -- Fail or Pass (do not use Partial Pass)
- Outcome Note -- Explain if there were problems. Leave blank if everything is fine.
- Event Date/Time
- Date/Time specifier -- UTC Timestamp
- UTC Timestamp -- Enter today's date
- Agent Links -- Add two
- First:
- Role -- Varies
- Transmitter (for Acknowledgment Sent and similar Events)
- Authorizer (for Agreement Signed and similar Events)
- Agents -- The staff member who sent the acknowledgement, received the signed agreement, etc.
- Second:
- Role -- Recipient
- Agents -- The donor
- Record Links -- Should be automatically supplied by the system.

Accession Events

- Acknowledgement Sent -- required
- Agreement Sent -- required
- Agreement Signed -- required
- Cataloged -- Use when a WMS record is created
- Copyright Transfer -- Use if applicable
- Processed -- Do not use this Event record; this information will be in the Resource record

Resource Events

- No Events will be added at the point a new Resource is spawned from an Accession
- Events will be added as work is done with the collection

New Accession Record in ArchivesSpace

Created by Angela Kroeger, last modified on Nov 14, 2014

New Accession Record

Note: Create an Accession record for all new acquisitions in all collecting areas. Legacy collections will not have Accession records, only Resource records.

Create --> Accession

- Basic Information
  - Title -- See DACS
    - Name of individual or organization responsible for creation of collection + Collection, Papers, or Records (as appropriate)
    - Donor agreement may stipulate a title for artificial collections
    - For other artificial collections, case-by-case decision
    - For single items or small collections of single type of material, the name of that type of material (e.g.: letter, scrapbooks, etc.) may be used
    - *NOTE: If the accession is an addition to an existing collection, append the Identifier to the end of the collection title. This is especially important for collections which are expected to receive many updates over time.*
  - Identifier (Accession)
    - Year + 3-Digit Number (based on number of accession for year)
    - e.g.: 2014-001 would be the first accession in 2014
    - All in single field (first box)
    - This numbering crosses all collections in the Criss Library Repository: Archives, Afghanistan, Special Collections. The Hagel Archives has a separate system.
    - To determine the accession number, browse Accessions, sort by identifier to see the most recently used number, and assign the next number in sequence.
  - Accession Date
    - Date the materials arrived in A/SC
  - Content Description
    - Brief overview of collection, created by staff member or received by donor (this is the Scope & Contents note from the Accession Word document)
  - Condition Description
    - Optional/Required if there is anything unusual about the physical condition or preservation concerns
  - Disposition
    - Fill in if an accession is split into separate collections at point of acquisition
  - Inventory
    - Fill in if a donor has supplied an inventory or if boxes are clearly labeled as to content
  - Provenance
    - Required if we have any information
    - Custodial history, detailed acquisition information
    - Who gave it to us? When? Where did it come from ?
  - Retention Rule
    - We are not using this field at this time
  - General Note
    - Any other information not already covered by another field
  - Acquisition Type
    - Required
  - Resource Type
    - Requried

- o Restrictions Apply?
  - ▪ Indicate if there are restrictions from deed of gift or applicable statutes (excluding copyright law)
- o Publish?
  - ▪ Uncheck. We will not publish Accession records, only Resource records
- o Access Restrictions Apply? / Access Restrictions Note
  - ▪ Fill out if any equipment is needed to view the material (electronic resources, audiovisual materials, etc.)
- o Use Restrictions? / Use Restrictions Note
  - ▪ Specify which materials have restrictions from deed of gift or statue, and what those restrictions are. Also specify preservation restrictions (e.g.: fragile book, users must use digital surrogate, etc.)

- Dates
  - o Creation
    - ▪ Expression: Date materials in the collection were created
    - ▪ Type: Bulk Date (most of the collection, but not necessarily all of the material, falls within these dates), Inclusive Dates (all material falls within these dates, no outliers), Range (approximate?), Single (single item, known date, or all materials known to be from same year)
    - ▪ Begin/End (fill in when known)
    - ▪ Certainty (usually will use Approximate)
    - ▪ Era / Calendar -- don't fill in unless the item is NOT from the common era

- Extents
  - o Whole
    - ▪ Number (number of cubic feet, gigabytes, etc.)
    - ▪ Cubic Feet (standard for physical resources), Megabytes/Gigabytes (for electronic resources)
    - ▪ Container Summary (number of boxes, binders, bags, loose items, etc.)
    - ▪ Physical Details -- include list of format types if such appears in the Word document. Otherwise, leave blank.
    - ▪ Dimensions -- only fill out for single items (not collections)

- Agent
  - o Role: Creator
    - ▪ Title -- Doctor, General, etc. if applicable
    - ▪ Relator -- Use Creator unless a more specific term applies
    - ▪ Agents: BROWSE EXISTING AGENT RECORDS FIRST
      - ▪ If no existing Agent record is found, create one.
  - o Role: Source
    - ▪ Relator: Use Donor unless a more specific term applies
    - ▪ Agents: BROWSE EXISTING AGENT RECORDS FIRST
      - ▪ If no existing Agent record is found, create one.
      - ▪ Note: Source may be same as Creator. Include both roles even if linking to the same Agent record.

- Related Resources -- Required if applicable
- Subjects -- Skip
- External Documents
  - o Reference any files supplied by the donor
  - o Reference links to websites, citations to articles, etc., referencing the collection
  - o Title (of document, web page, etc.)
  - o Location (URL, location on shared drive, location in file cabinet, etc.)
  - o Publish? Uncheck
- Rights Statements
  - o Rights Type: Institutional Policy
  - o Materials -- leave blank
  - o Type Note -- leave blank

- o Permissions: Paste in default text (conditions governing use):
  - *The researcher assumes full responsibility for conforming with the laws of copyright. Whenever possible, Archives & Special Collections will provide information about copyright owners and related information. Securing permission to publish or use material is the responsibility of the researcher. Note that unless specifically transferred to the University of Nebraska at Omaha, any applicable copyrights may be held by another individual or entity. Further information about copyright policy is available at http://libguides.unomaha.edu/library_policies.*
- o Restrictions: Paste in default text (conditions governing access):
  - *The collection is open for research use. Manuscript collections and archival records may contain materials with sensitive or confidential information that is protected under federal or state right to privacy laws and regulations, the Nebraska Public Records Statutes (Neb. Rev. Stat. §§ 84-712 through 84-712.09), and other relevant regulations. Confidential material may include, but is not limited to, educational, medical, and personnel records. Researchers are advised that the disclosure of certain information pertaining to identifiable living individuals represented in this collection without the consent of those individuals may have legal ramifications (e.g., a cause of action under common law for invasion of privacy may arise if facts concerning an individual's private life are published that would be deemed highly offensive to a reasonable person) for which the University of Nebraska Omaha assumes no responsibility.*
- o Restrictions Start Date / End Date -- fill in ONLY if donor has specific time-based restrictions
- o Granted Note -- fill in if applicable (stipulations from donor agreement)
- o External Documents -- Reference deed of gift if restrictions apply
- Instances
  - o Type: Accession
  - o Container 1 Type: Box, Volume, Object, etc. as appropriate
  - o Container 1 Indicator: numeric expression of boxes (e.g.: 1-12 if there are 12 boxes)
  - o Container 2, etc. Type / Indicator -- Fill out if there is more than one type of container in the accession (e.g.: Container 1 Type: Box, Container 2 Type: Reel)
  - o Container Extent -- Leave blank UNLESS multiple instances are being used to indicate that a collection has been separated into different locations upon receipt, in which case, container extent would represent a smaller value than the whole extent listed at the beginning of the Accession record
  - o Locations:
    - Current
    - Start Date: The date it was put on the shelf, in someone's office, or wherever
    - End Date: Leave blank
    - Note: ArchivesSpace allows only one current location for an instance, so if the collection spans multiple shelves, drawers, etc., list all locations in the Note field
    - Location: Browse for shelf number (if the collection occupies multiple locations, link only to the first one here and list the full range in the note above)
      - Note: In ArchivesSpace training in November 2014, Brad Westbrook mentioned that a location management tool was in the works. Expect procedures for documenting locations in ArchivesSpace to change in the future.
- Deaccessions -- skip
  - o This would be added later if some materials were returned to the donor sometime after accessioning
- Collection Management -- skip
- Classification -- Assign to relevant collecting area: Arthur Paul Afghanistan Collection, Special Collections, or University Archives. [Expect to add Hagel in the future.]
- User Defined -- skip
- Save

Next steps . . .

If the Accession is for a new collection which does not have a pre-existing Resource record, [spawn a new Resource record](#)***. (Do this immediately or ASAP.)***

If the Accession is an addition to an existing collection, edit the Resource record:

- *Scroll down to Related Accession section:*
    - *Click Add Related Accession*
    - *Browse for the accession you just created (this is the reason for including the Identifier in the title).*
- *Update the following fields in the Resource record to reflect the new accession:*
    - *Dates*
    - *Extents*
    - *Note: Scope and Contents*
        - *In this case, add the Scope and Contents from the Accession as a new paragraph at the end of the Resource's Scope and Contents note. At the beginning of the new paragraph, include the date (e.g.: New material added 2014-09-29: [text]).*

New Corporate Entity Agent Record in ArchivesSpace

Created by Angela Kroeger, last modified on Nov 14, 2014

New Agent: Corporate Entity

Note: For Agent records created during the initial data load, many of these elements are not populated. Enhance existing Agent records as time allows.

Create --> Agent --> Corporate Entity

- Basic Information
    - Agent Type - Corporate Entity
    - Publish? Yes
- Dates of Existence -- include if known for Local source names; for NACO-authorized names, include only if a MARC 110 $d is present
    - Label - Existence
    - Expression - free text for date range
    - Type - Range or Single as appropriate
    - Begin - Date organization was founded, merged, or otherwise began operating under this name
    - End - Date organization ceased to exist
    - Certainty - Approximate (default)
    - Era - ce (default)
    - Calendar - Gregorian (default)
- Name Forms
    - Authority ID - include authority number for NACO Authority File; leave blank for Local sources
    - Source - NACO Authority File or Local sources
    - Rules - DACS
    - Primary Part of Name -- Full name (if no subdivisions) or first part of compound name (e.g.: University of Nebraska at Omaha)
    - Subordinate Name 1 -- Second part of name (e.g.: Department of Geography-Geology)
        - Note: Names are ordered from parent organization to smallest unit. In most cases, only the highest and lowest levels are listed. So, for example, the authorized form of the name (NACO n81099504) is University of Nebraska at Omaha. Department of Geography-Geology, NOT University of Nebraska at Omaha. College of Arts and Sciences. Department of Geography-Geology. For local names, follow the NACO practices and patterns as much as possible.
    - Subordinate Name 2 -- Third part of name
    - Number -- leave blank
    - Qualifier -- leave blank. If NACO form of name includes a parenthetical qualifier, include it with the Primary Part of Name or Subordinate Name as appropriate, because ArchivesSpace generates incorrect MARCXML encoding for qualifiers.
    - Sort Name - leave Automatically generate checked
    - ADD NAME FORMS for variant forms of a name (e.g.: if an organization is popularly known by its initials or a shorter form of its official name). Do NOT use for earlier/later names of the organization; earlier/later names should have their own Agent records, which should be connected with Related Agent links
- Date(s) of Name Use -- Leave blank for persons
- Contact Details -- Include contact info for individuals within the organization, particularly anyone who has served as a liaison to Archives and Special Collections. This contact information will not display to the public, even if the Agent record is published, so the phone numbers, email addresses, and postal addresses are safely private. It is permissible to have multiple contacts attached to a Corporate Entity Agent record.

- o Contact Name -- The person's name, in direct order
- o Salutation -- optional
- o Address 1, 2, & 3; City; State/Region; Country; Post Code -- use for postal address if known
- o Telephone; Telephone Extension -- use for primary telephone number. If more than one phone number is known for a contact, include the other(s) in the Contact Notes.
- o Fax -- include if known
- o E-mail -- use for primary email address. If more than one email address is known for a contact, include the other(s) in the Contact Notes.
- o Contact Notes -- Any information specific to this individual person; do not use for notes that apply to the organization as a whole.
- Notes
  - o Note Type: Biographical/Historical -- Write a brief paragraph expressing whatever details are known about the organization's history, mission, activities, etc. Some research may be required.
- Related Agents -- Link to other Agent records if applicable
  - o Associative Relationship
    - Relationship Type -- Associative with Related.
    - Related Agent -- Link to other Agent record.
    - Description -- Describe the nature of the relationship. Remember that the Related Agent link goes both ways, so whatever text you type here must make sense when viewed within either of the associated Agent records.
    - Dates -- Add if known
      - Label -- Agent Relation
      - Expression - free text for date range
      - Type - Range or Single as appropriate
      - Begin - Start date of relationship
      - End - End date of relationship
      - Certainty - Approximate (default)
      - Era - ce (default)
      - Calendar - Gregorian (default)
  - o Earlier/Later Relationship -- Use to link only to the immediate predecessor or immediate successor. If an organization has changed names many times, these links should form a clear chain from one form to the next.
    - Relationship Type -- Earlier Form of Related OR Later Form of Related.
      - Note: The public display is confusing, making it seem like these relationships point in the opposite direction. "Related" always refers to the record you are linking to (per Brad Westbrook's ArchivesSpace training). So use "Earlier Form of Related" when the Agent you are editing is the predecessor and the Agent you are linking to is the successor.
    - Related Agent -- Link to other Agent record.
    - Description -- Unnecessary as the Relationship Type expresses this clearly.
    - Dates -- Add if known
  - o Subordinate/Superior Relationship
    - Relationship Type -- Is Subordinate to Related OR Is Superior to Related
      - Note: The public display is confusing, making it seem like these relationships point in the opposite direction. "Related" always refers to the record you are linking to (per Brad Westbrook's ArchivesSpace training). So use "Is Subordinate to Related" when the Agent you are editing is a subunit of the Agent you are linking to.
    - Related Agent -- Link to other Agent record.
    - Description -- Unnecessary as the Relationship Type expresses this clearly.
    - Dates -- Add if known
- External Documents -- Include any reference sources used for the Biographical/Historical note.

New Person Agent Record in ArchivesSpace

Created by Angela Kroeger, last modified on Nov 14, 2014

New Agent: Person

Create --> Agent --> Person

- Basic Information
  - Agent Type - Person
  - Publish? Yes
- Dates of Existence – Use for the date portion for NACO-authorized name forms (per Brad Westbrook's ArchivesSpace training), if present. For local (non-NACO) name forms, include if known.
  - Label - Existence
  - Expression - free text for date range
  - Type - Range (even for living persons with open date ranges)
  - Begin - Birth date
  - End - Death date
  - Certainty - Approximate (default)
  - Era - ce (default)
  - Calendar - Gregorian (default)
- Name Forms
  - Authority ID - include authority number for NACO Authority File; leave blank for Local sources
  - Source - NACO Authority File or Local sources
  - Rules - DACS
  - Name Order - Indirect
  - Prefix - leave blank
  - Title - leave blank
  - Primary Part of Name - Last name
    - For names in NACO Authority File, this is the part of the MARC 100 $a that precedes the comma
  - Rest of Name - First name, including middle name/initial if known
    - For names in the NACO Authority File, this is the part of the MARC 100 $a that follows the comma
  - Suffix - leave blank
  - Fuller Form - use only for NACO-authorized names that have a fuller form in parentheses
    - For names in the NACO Authority File, this is the part of the name that is within the MARC 100 $q
    - Do not enclose in parentheses (ArchivesSpace supplies them automatically in the display)
  - Number - leave blank
  - Qualifier - leave blank
  - Sort Name - leave Automatically generate checked
  - ADD NAME FORMS for variant forms of a name, e.g.: A married woman's maiden name, a known nickname, etc.
    - A variant form may be from Local sources, even if the authorized name is from the NACO Authority File. The reverse is not true.
- Date(s) of Name Use -- Use only for employment dates for the Agent records of current and past Archives and Special Collections faculty and staff members. Otherwise, leave blank.
- Contact Details -- Include if you have contact information for the person or someone closely associated with the person
- Notes

- o Note Type: Biographical/Historical -- Write a brief paragraph expressing whatever biographical details are known about the person, particularly noting their association with OU/UNO in the case of Agents related to University Archives collections. Some research may be required. Cite sources or provide links to more detailed information when applicable.
- Related Agents -- Link to other Agent records if applicable
  - o Associative Relationship
    - Relationship Type -- Associative with Related.
    - Related Agent -- Link to other Agent record.
    - Description -- Describe the nature of the relationship. Remember that the Related Agent link goes both ways, so whatever text you type here must make sense when viewed within either of the associated Agent records.
    - Dates -- Add if known
      - Label -- Agent Relation
      - Expression - free text for date range
      - Type - Range or Single as appropriate
      - Begin - Start date of association (date married, began employment, etc.)
      - End - End date of association (death of spouse, retirement, etc.)
      - Certainty - Approximate (default)
      - Era - ce (default)
      - Calendar - Gregorian (default)
  - o Earlier/Later Relationship -- Do not use for persons. Add additional name forms to include all names a person used over their lifetime.
  - o Parent/Child Relationship
    - Relationship Type -- Parent of Related or Child of Related, as applicable
      - Note: The public display is confusing, making it seem like these relationships point in the opposite direction. "Related" always refers to the record you are linking to (per Brad Westbrook's ArchivesSpace training). So use "Child of Related" when the Agent you are editing is the child and the Agent you are linking to is the parent.
    - Related Agent -- Link to other Agent record.
    - Description -- A brief sentence about the family, listing all relevant/known parents and children. (Not a full genealogy or biography.)
    - Dates -- Add if known
      - Label -- Agent Relation
      - Expression - free text for date range
      - Type - Range or Single as appropriate
      - Begin - Birth date
      - End - Death date
      - Certainty - Approximate (default)
      - Era - ce (default)
      - Calendar - Gregorian (default)
- External Documents -- Include any reference sources used for the Biographical/Historical note.

New Resource Record (Spawned) in ArchivesSpace

Created by Angela Kroeger, last modified by Amy Schindler on Jan 28, 2015

New Resource Record (Spawned from Accession Record)

All new collections will have Accession records from which to spawn a Resource record. Only legacy collections with have Resource records with no Accession records.

Spawn --> Resource

- Basic Information
    - Title should be carried over from Accession record
    - Identifier
        - Code + 4-Digit Number
        - Code for collection area:
            - UNO for University Archives
            - MSS for Special Collections
            - APAC for the Arthur Paul Afghanistan Collection
            - USSCHA for the U.S. Senator Chuck Hagel Archives
        - Use next consecutive 4-digit number for that collection area:
            - e.g.: UNO 0129, APAC 0079
        - All in single field (first box)
        - To determine the accession number, browse Resources, sort by identifier to see the most recently used number, and assign the next number in sequence.
    - Level of Description -- Collection
        - Other options are possible, but unlikely. You'll know if you have one.
    - Resource Type
        - Collection -- an artificial collection
        - Papers -- papers of a person or family
        - Publications -- formally published material
        - Records -- records of an organization
    - Language -- Defaults to English, change if appropriate
        - Cannot add a second language, so use the language of the majority of the collection
    - Publish? -- Yes
    - Restrictions? -- Check if there are any unusual restrictions
    - Repository Processing Note -- Internal only field (not visible to public)
        - If the collection occupies more than one shelf or drawer, put the complete list of locations occupied by the collection in this text field. (This is temporary, until ArchivesSpace implements a fully functional location management tool.)
- Dates -- Should be auto-populated with info from Accession record
- Extents -- Should be auto-populated with info from Accession record
- Finding Aid Data
    - EAD ID -- leave blank
    - EAD Location -- leave blank
    - Finding Aid Title -- Same as title of collection as listed above
    - Finding Aid Filing Title -- leave blank
    - Finding Aid Date -- The date you are creating this record.
    - Finding Aid Author [free text, not linked to an Agent record] -- Your name, direct order
    - Description Rules -- DACS
    - Language of Description -- English
    - Sponsor -- List anyone who contributed to the description
    - Edition Statement -- leave blank until record is revised

- o Series Statement -- leave blank
- o Revision Date -- leave blank until record is revised
- o Revision Description -- leave blank until record is revised; then summarize the nature of the edits to the finding aid
- o Finding Aid Status -- Unprocessed (change to In Progress once processing begins)
- o Finding Aid Note -- Normally blank, but use for any information not covered elsewhere
- Related Accessions -- Should be auto-populated with title of Accession record
- Agent Links -- Should be auto-populated with info from Accession record
    - o Note: If Agents do not display in the public view, they may not be published. In this case, you must go into each non-displaying Agent record and click the Publish checkbox.
    - o For Records and Papers, you may need to add an Agent link with a role of Subject.
        - ▪ Corporate Agents may take a subdivision of Records and correspondence
        - ▪ Person Agents may take a subdivision of Correspondence
        - ▪ Other valid LCSH subdivisions may be used. (The easiest place to find these is by searching/browsing the authority file in OCLC Connexion.)
        - ▪ If no valid subdivisions seem appropriate, include the Agent with Subject role and no subdivisions
- Subjects -- Add at least one subject that covers the general content of the collection; more can be added as the collection is processed and specific details become known
    - o BROWSE existing Subject records in Archives Space first
        - ▪ Records, Correspondence, and other high-level, broad headings are suitable at this level
    - o If no existing AS Subject records apply, create a new one, using Library of Congress Subject Headings
    - o Likewise (browse first, create if necessary), add Art & Architecture Thesaurus headings for formats and genres, including all of the format types listed in the Word document for the accession
- Notes -- Types of notes are listed below in the order in which they should appear in the record.
    - o Scope and Contents -- Content Description
        - ▪ Should be auto-populated with info from Accession record
    - o Physical Description -- Condition Description
        - ▪ Should be auto-populated with info from Accession record
        - ▪ This may not always be present or necessary
    - o Arrangement -- Add
        - ▪ Multipart Note
            - ▪ Persistent ID -- leave blank
            - ▪ Label -- leave blank
            - ▪ Type -- Arrangement
            - ▪ Publish? Yes
        - ▪ Text
            - ▪ Content
                - ▪ Add the following note:
                    - ▪ Collection has not yet been arranged and described.
                    - ▪ When collection is processed, edit this to reflect series or other arrangement.
            - ▪ Publish? Yes
    - o Conditions Governing Access
        - ▪ Although this info appears in the Rights Statements Institutional Policy, it is not visible to the public there.
        - ▪ Persistent ID -- leave blank
        - ▪ Label -- leave blank
        - ▪ Type -- Conditions Governing Access
        - ▪ Publish? Yes
        - ▪ Sub Notes -- Text
            - ▪ Content -- Matches the Restrictions note in the Rights Statements section.

- Paste in default text (conditions governing access):
  - The collection is open for research use. Manuscript collections and archival records may contain materials with sensitive or confidential information that is protected under federal or state right to privacy laws and regulations, the Nebraska Public Records Statutes (Neb. Rev. Stat. §§ 84-712 through 84-712.09), and other relevant regulations. Confidential material may include, but is not limited to, educational, medical, and personnel records. Researchers are advised that the disclosure of certain information pertaining to identifiable living individuals represented in this collection without the consent of those individuals may have legal ramifications (e.g., a cause of action under common law for invasion of privacy may arise if facts concerning an individual's private life are published that would be deemed highly offensive to a reasonable person) for which the University of Nebraska Omaha assumes no responsibility.
- Publish? Yes

o Conditions Governing Use
  - Although this info appears in the Rights Statements Institutional Policy, it is not visible to the public there.
  - Persistent ID -- leave blank
  - Label -- leave blank
  - Type -- Conditions Governing Use
  - Publish? Yes
  - Sub Notes -- Text
    - Content -- Matches the Permissions note in the Rights Statements section.
    - Paste in default text (conditions governing use):
      - The researcher assumes full responsibility for conforming with the laws of copyright. Whenever possible, Archives & Special Collections will provide information about copyright owners and related information. Securing permission to publish or use material is the responsibility of the researcher. Note that unless specifically transferred to the University of Nebraska at Omaha, any applicable copyrights may be held by another individual or entity. Further information about copyright policy is available at http://libguides.unomaha.edu/library_policies.
    - Publish? Yes

o Custodial History
  - Persistent ID -- leave blank
  - Label -- leave blank
  - Type -- Custodial History
  - Publish? Yes
  - Sub Notes -- Text
    - Content -- Copy the content from the Provenance note in the Basic Information section of the Accession record. This information is NOT automatically included in the spawned Resource record, so you will need to open the original Accession record in another browser tab or window.
    - Publish? Yes

o Immediate Source of Acquisition -- Although this element was included in our initial load of records, it is unnecessary for new records because the donor is already clearly identified as a linked Agent. Include an Immediate Source of Acquisition field only if necessary to convey information not covered by the donor Agent and the Custodial History.

o Accruals -- Required if collection is expected to grow.
  - Persistent ID -- leave blank

- Label -- leave blank
- Type -- Custodial History
- Publish? Yes
- Sub Notes -- Text
  - Content – Describe source and schedule for which new material will be added to the collection in the future. (Example: Members of the Women's Club send new materials to the Criss Libray on an irregular schedule.)
  - Publish? Yes
- Related Materials -- Required if applicable.
  - Persistent ID -- leave blank
  - Label -- leave blank
  - Type -- Related Materials
  - Publish? Yes
  - Sub Notes -- Text
    - Content -- List any related Collections held within any of the Repositories at UNO.
    - Publish? Yes
- Preferred Citation
  - Persistent ID -- leave blank
  - Label -- leave blank
  - Type -- Preferred Citation
  - Publish? Yes
  - Sub Notes -- Text
    - Content -- [Title of collection], Archives and Special Collections, Dr. C.C. and Mabel L. Criss Library, University of Nebraska at Omaha.
      - Use actual title of collection, not "title of collection."
    - Publish? Yes
- Existence and Location of Copies – Required if applicable.
  - Persistent ID -- leave blank
  - Label -- leave blank
  - Type -- Preferred Citation
  - Publish? Yes
  - Sub Notes -- Text
    - Content -- Example for microform copies: Portions of the collection have been microfilmed and are available for use in Criss Library's microforms collection. The microform collection is located on the first floor of Criss Library and is available whenever the library is open. Assistance for the microform collection is available at the Research Center service desk on the first floor. The Minutes of Board of Directors and Executive Committee, 1902-1992 call number is Microfilm HF296 .O54 M23. The Minutes of Committees, 1912-1989 call number is Microfilm HF296 .O54 M22.
    - Publish? Yes
- Add note fields of other types if necessary. Most records will not need them. Additional notes will go at the end of the note sort order, after Preferred Citation.
- External Documents
  - Should be auto-populated with info from Accession record
  - May need to check Publish.
- Rights Statements
  - Should be auto-populated with info from Accession record
  - There does not appear to be any way to make this public. The Permissions and Restrictions statements must be manually copied to the Notes section
- Instances
  - Should be auto-populated with info from Accession record
  - This will be added to as the collection is processed, but do not edit it at the point of creation for the spawned record.

- Deaccessions -- Do not use in spawned record
- Collection Management
  - Priority: Assign High, Low, or Medium
    - [NOTE: It is not yet determined how priority will be assigned. Until guidelines are created, usethe default of Medium.]
  - Leave all other fields blank, except in unusual situations. (e.g.: If the donor gives us money to process the collection, this would be noted in the Funding Source field.)
- Classifications
  - Should be auto-populated with info from Accession record
  - If not auto-populated, assign to relevant collecting area: Arthur Paul Afghanistan Collection, Special Collections, or University Archives. [Expect to add Hagel in the future.]
- User Defined -- Do not use

New Subject Record in ArchivesSpace

Created by Angela Kroeger on Oct 02, 2014

New Subject Record

Create --> Subject

- Basic Information
  - Authority ID -- Use the ID number from the authority selected below in Source; leave blank if Source is local.
    - May have blank Authority ID in conjunction with LCSH Source if:
      - All terms and subdivisions are in LCSH.
      - The free floating subdivisions are valid for use with the main term.
      - No LCSH authority record exists with all of those terms and subdivisions together in a single heading.
      - e.g.: Teachers' workshops -- Nebraska.
        - There is an LCSH authority record for Teachers' workshops, and geographic subdivisions are allowed.
        - There is an LCSH geographic authority record for Nebraska, and it may be used as a subdivision.
        - There is no LCSH for Teachers' workshops $z Nebraska, but from the above, it is clearly a valid construction in LCSH, and so the Subject record in ArchivesSpace would have LCSH as its Source, but the AuthorityID would be left blank because there isn't a single ID that covers this heading.
  - Source
    - Art & Architecture Thesaurus -- Use for genre terms
    - Library of Congress Subject Headings -- Use when an LCSH exists
    - Use other thesauri as appropriate
    - Local sources -- Use if none of the controlled vocabularies have an appropriate term
  - Scope Note -- leave blank, unless necessary to clarify a potentially ambiguous term
- Terms and Subdivisions
  - Term -- The authorized term from AAT, LCSH, etc., or the locally defined term
  - Type -- Topical will be most common. Genre / Form for format terms. Use whichever Type term is correct.
  - Add other Terms and Subdivisions as needed. (They will be hierarchical from the top down -- e.g.: Nebraska -- Social conditions -- 20th century. Those terms would be Geographic, Topical, and Temporal, respectively.)
- External Documents -- very unlikely that we'd include anything here for a Subject record.

Rapid Data Entry in ArchivesSpace

Created by Angela Kroeger on Oct 01, 2014

Rapid Data Entry

- You must be editing the Resource record for the Rapid Data Entry button to appear
- In the tree of instances, click on the line **hierarchically above** the instance(s) you wish to add
    - For unprocessed collections, the collection title will likely be the only line present and it will be highlighted by default
- Click Rapid Data Entry button
    - Level of Description -- Series (top level--lower levels may include Box, Folder, Item, etc.)
    - Publish? Yes
    - Title -- Title of series, box, folder, or whatever. e.g.: Series 1: Correspondence, Series 2: Photographs.
    - Component Unique Identifier -- leave blank
    - Language -- defaults to English
    - Expression -- leave blank unless a free-text date is necessary
    - Date Type -- Bulk Date (most of the collection, but not necessarily all of the material, falls within these dates), Inclusive Dates (all material falls within these dates, no outliers), Range (approximate?), Single (single item, known date, or all materials known to be from same year)
    - Begin -- date range start
    - End -- date range end
    - Instance Type -- Mixed Materials unless another option is applicable
    - Container 1 Type -- Box, Folder, etc.
    - Container 1 Indicator -- Numbers (range, inclusive) of container defined in Container 1 Type (e.g.: Box 1-8)
    - Container 1 Barcode -- leave blank
    - Container 2 . . . -- leave blank
    - Note 1, etc. -- normally leave blank

Alternatively . . .

- Add Child to add a lower-level entry to the existing hierarchy
- Add Sibling to add another entry at the same level of the hierarchy
    - For both Add Child/Add Sibling, it will not open the Rapid Data Entry interface, but an Archival Object workform. More fields are available. (Use this if fields not available in Rapid Data Entry are needed.)
    - Archival Object workform procedures will not be defined separately. Refer to equivalent fields in description of Resource creation.