Using ArchivesSpace: A Quick Guide

Sarah Coates

Oklahoma State University

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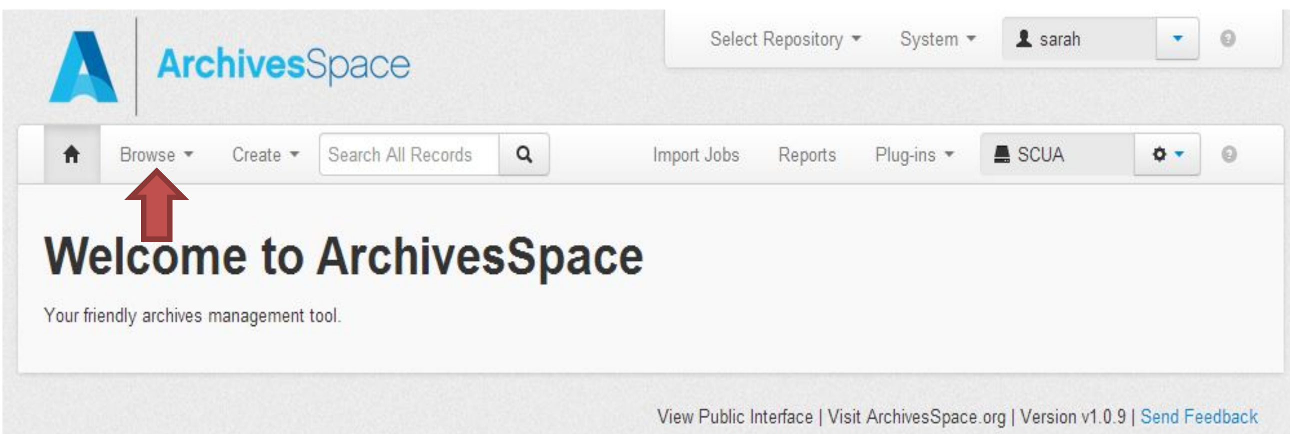
Opening/Accessing ArchivesSpace

Go to ArchivesSpace (AS) by opening up your internet browser of choice and clicking on the ArchivesSpace bookmark. If there is no bookmark, go to http://archivespaces.library.okstate.edu:8080

You'll see a screen that looks like this:

Click the **Sign In** button in the top right corner, and enter your username and password. Once you're signed in, you'll see a screen that looks something like this (you may have less buttons visible depending on your access level in AS):



This is your homescreen for AS, and is what you'll see every time you log on. For the most part, the only thing you'll ever click on is the **Browse** button (see red arrow, above) as that will allow you to search our accession records and resource records.

Note: You will need to log out of AS after you are done using it. To log out, click the arrow next to your name and choose Logout from the dropdown menu.

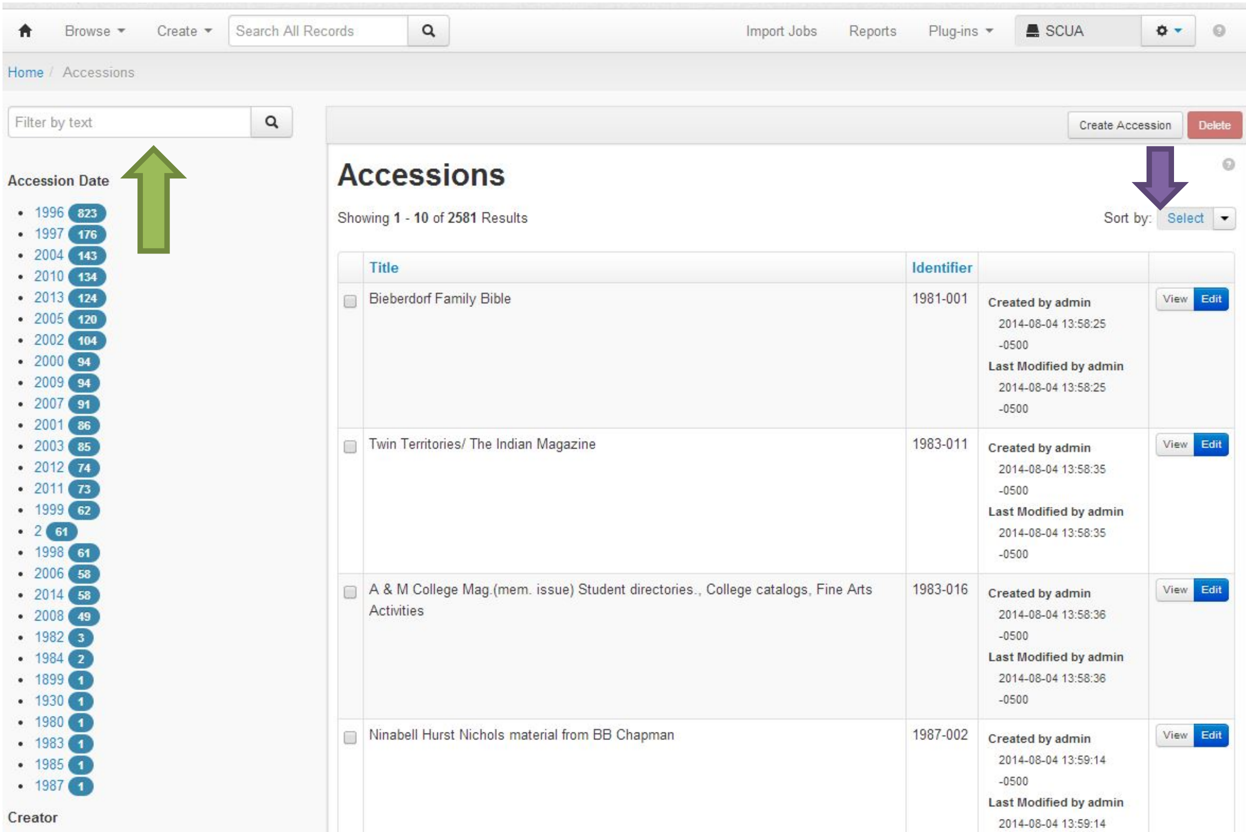
Accession Records

What is an accession? An accession is a group of materials that the department receives from an individual, a department, etc. Everything that is accepted by the department (with the exception of gift books) must be accessioned. Accessioning is only done by the person(s) designated by the SCUA department head.

Accession records tell you what material we received, who we received it from, when we received it, and what collection(s) the material will be dispersed into. They also tell you where the collection is located. An accession number is NOT a collection number! While some accession numbers will be the same as their corresponding collection numbers, accessions are often added to their correct collections, which will have a different collection number from the accession number you're looking at. Never fear—the accession record will tell you which collection number the material in the accession was assigned to.

To access/search Accession records:

After you've logged into AS, click the **Browse** button on the upper left corner (see red arrow in the above screenshot on page 3), and choose **Accessions** from the dropdown menu. You'll see a screen that looks something like this (you may not see some buttons/options depending on your level of AS access):



Here are some things to note about the Accessions results list:

1) You can **search** Accessions by accession/collection number or by keyword/full text in the **Filter by Text** box (see green arrow, above).
    a. Note: Do not use the Search All Records box as it will search across all of AS. You can use this if you want to, but be aware that your results will not be limited to just the accession records
    b. If you ever used Archivists' Toolkit, please note that the . in accession numbers was changed by default to a – in AS. So, accession 2014.026 became 2014-026.
2) The **Identifier** column shows the accession number. The **Title** column gives the title of the accession.
3) You can **sort** your results by using the **Sort by** dropdown menu (see purple arrow, above)
4) To open an accession record, click on the **View** button in the last column.

Once you've opened an accession record, you'll see a screen that looks like this (obviously, it will have the information for your accession in it):

Note: the screenshot of an entire accession record appears on the next page. The page after the screen shot will go over each item in the accession record, in the order in which they appear in the record.

Edit | Add Event | Spawn | Suppress | Delete

John Joseph Mathews Correspondence Accession

Basic Information

Title	John Joseph Mathews Correspondence
Identifier	2014 029
Accession Date	2014-04-01
Content Description	Correspondence to and from Mathews. Includes clippings. Correspondence subjects range from personal correspondence, book review requests, publication requests and permissions.
Condition Description	Some are torn/chewed, some have spill damage
Disposition	Assigned to collection #2014-029. Donated by Richard W. Plute 3752 E. Hwy 66 Stroud, OK 74079 918-290-9779 richard_plute@yahoo.com
Access Restrictions Note	Restricted until processed
Use Restrictions?	False

Created by admin 2014-08-04 14:13:37 -0500, **Last Modified by admin** 2014-08-04 14:13:37 -0500

Dates

Creation	1960 – 1972

Extents

1.2 Linear Feet	(3 letter size document boxes)

Related Resources

Identifier	Title
2014-029	John Joseph Mathews Papers

Rights Statements

Intellectual Property	Copyrighted	Active

Instances

Accession	item
Accession	item

Collection Management

Processing Status: --	Priority: --

Accession item

Collection Management

Processing Status: -- Priority: --

The Parts of an Accession Record

Here is a breakdown of each item in the accession record, listed in the order in which they appear in the record:

Title: Gives the title of the accession

Identifier: the accession number (remember, these are not the same as a collection number!)

Accession date: the date on which the material was accessioned by SCUA

Content Description: a summary of the materials contained in the accession

Condition Description: a description of the condition of the materials in the accession. Damage to items is noted here.

Disposition: tells you what collection the material was assigned to. If the material was assigned to multiple collections, a brief description of what went where will also be provided. Finally, the name and contact information of the donor will be listed here.

Retention rule: this will always say retain permanently. However, some accessions will give permission to weed extra copies or other rules for retaining the materials in the accession.

Resource Type: this tells you if the accession is a collection, papers, or records (used only by the accessioner)

Restrictions Apply?: If there are restrictions of any kind on the accession, this will say True. Otherwise, it will say False.

Publish?: This will always be False. We do not make any of our accession records visible to the public.

Access Restrictions?: This will let you know if there are any access restrictions on the accession.

Access Restrictions note: This will usually say Restricted until processed, but might be blank. Any access restrictions will be noted here.

Use Restrictions: If there are any restrictions on the use of the accession, this will be True; otherwise, it will be False.

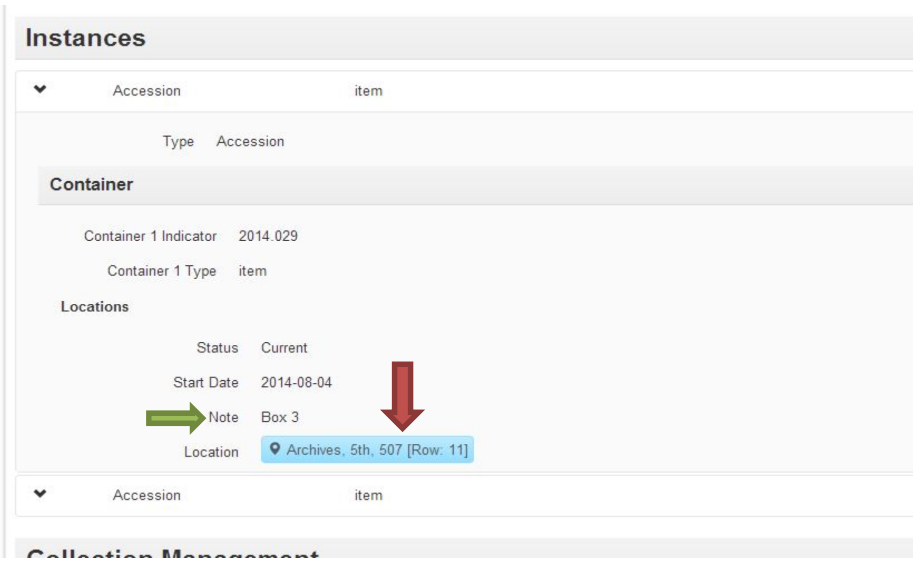
Dates: this tells you the date range/single date of the materials in the accession.

Extents: this lists the linear feet of the accession and also says how many boxes and what kind of boxes are in the accession.

Related Resources: This section tells you which collection the accession was assigned to. The collection number is listed in the Identifier column, and if you click on the blue box that has the collection title, and then click the View button that pops up, you will be taken to the Resource record (which has the finding aid) for the collection.

Rights Statements: if there are any copyright restrictions, they will be listed here.

Instances: this is where the physical location of the box(es) for the collection is. This field will only show up for the collection's accession record (so, if the accession you're viewing was assigned to another collection, there will be no Instances section on the accession record. To see the locations for that collection, get the collection number to which the accession was assigned and look that number up in the accessions). Click on the word Accession to reveal the information about the box(es) and view the location for it/them. When the instance record expands, you'll see this:



What you'll be interested in is the Note (green arrow above) and the Location (red arrow above) lines. The Note line tells you what box number(s) are on that shelf. The Location line tells you what row, bay, and shelf the box(es) is/are on.

Updating Linear Feet/Updating the number of boxes in a collection

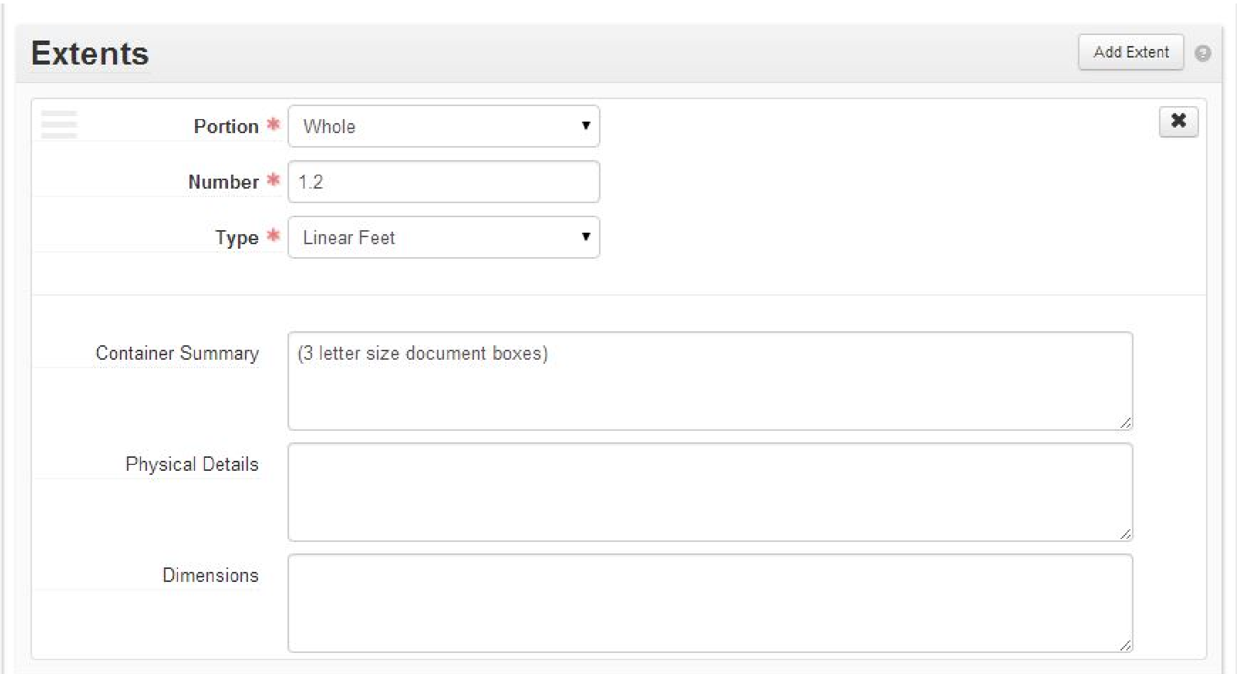
If you add boxes to an existing collection, you will need to update the linear feet in the accession record, and you will need to update the number and type of boxes in the collection. To do this, you will first need to search for the collection's accession record. Click the blue **Edit** button to open the accession record and edit it.

Once you have the correct record opened in edit mode, scroll down to the **Extents** section. Update the **Number** field with the new linear feet measurement. Remember, the Linear Feet Chart (in V:\INV\linear feet chart) will give you the correct linear feet measurement for each type of box.

(Note: 1 folder is .003 linear feet)

Then, update the number and type of boxes in the **Container Summary** field. Be sure to put this update in ( ), and write out fully the box type (so, record storage box, not RSB; document box, not doc box, etc.). With document boxes, be sure to say if they are slim ones, and be sure to specify if it's letter or legal sized. If there's only folder(s) in the collection (like if it's in Small Collections), or if there's only 1 tape, CD, etc., then just put the number of folders/tapes/CDs in ( ) in the Container Summary.

So, it should look like this:



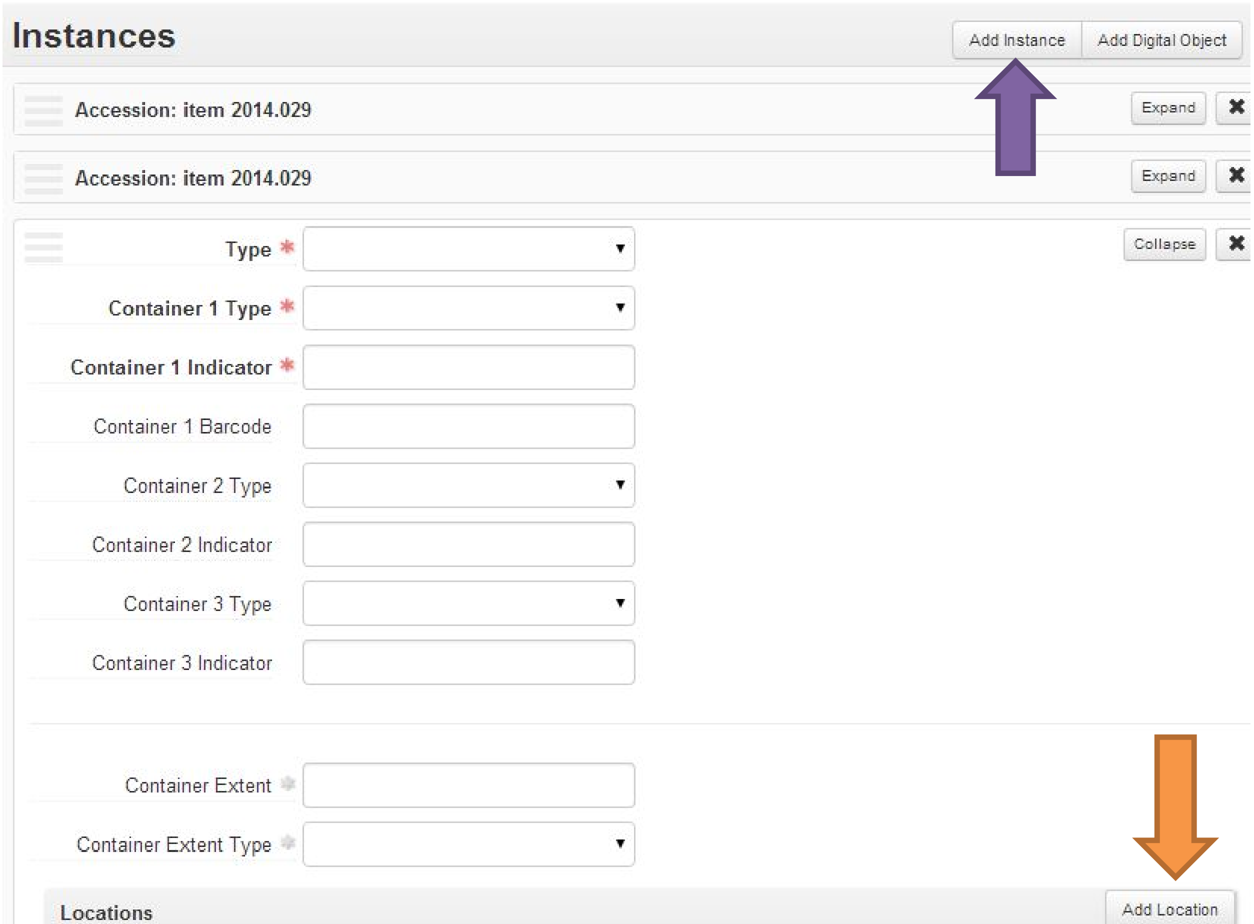
Adding/Editing a Box Location

If you add boxes to an existing collection, you will need to add the new box's location to AS. If you move boxes around, you will need to update their locations in AS. To do this, you will first need to search for the collection's accession record. Click the blue **Edit** button to open the accession record and edit it.

First, you will need to determine if you are adding the box to a shelf that a box/boxes from that collection are already on. If there are boxes for that collection already on the shelf on which you are adding the new box, see section B below. If there is nothing for that collection on the shelf you're adding the new box to, see section A below.

Section A (no collection boxes are on the shelf):

Scroll down to the **Instances** section. Click the **Add Instance** button (purple arrow below). You'll get a screen that looks like this:



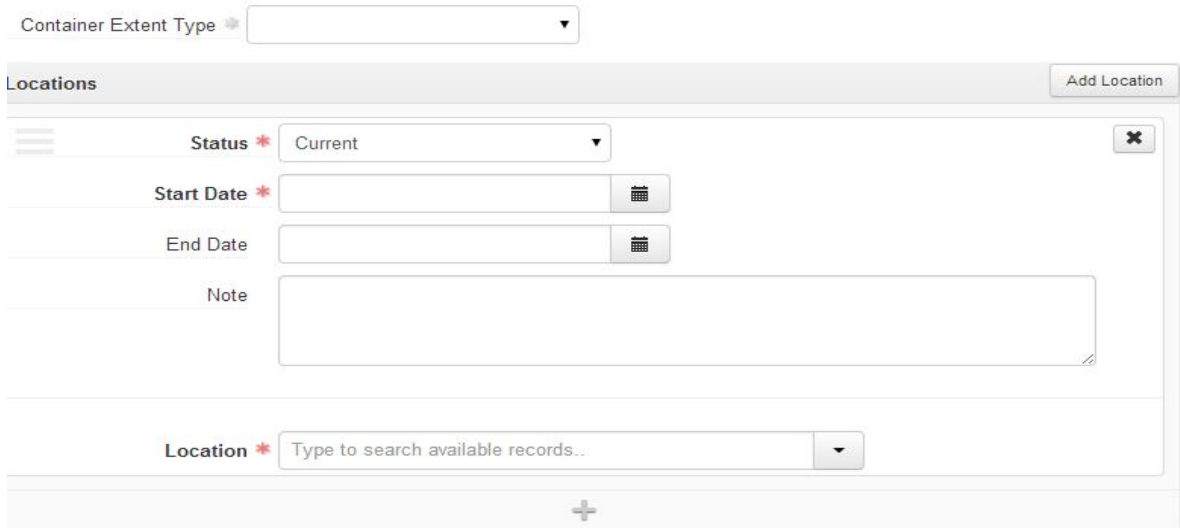
The **Type** menu: 99% of our materials are going to be **text**, so choose **Text**. If the box is a box of **photographs**, choose **Graphic Materials**. If it's an **Audio** material (like a CD or cassette tape), choose **Audio**. If it's a **map**, choose **Maps**. If it's an **object** (like a medal, trophy, mug, hat, etc.), choose **Realia**.

In the **Container 1 Type**, choose **Box**.

In the **Container 1 Indicator**, type the box number/box numbers that will be on that shelf (using Arabic numerals: 1, 2, 3, etc.).

Then, click the **Add Location** button (orange arrow above).

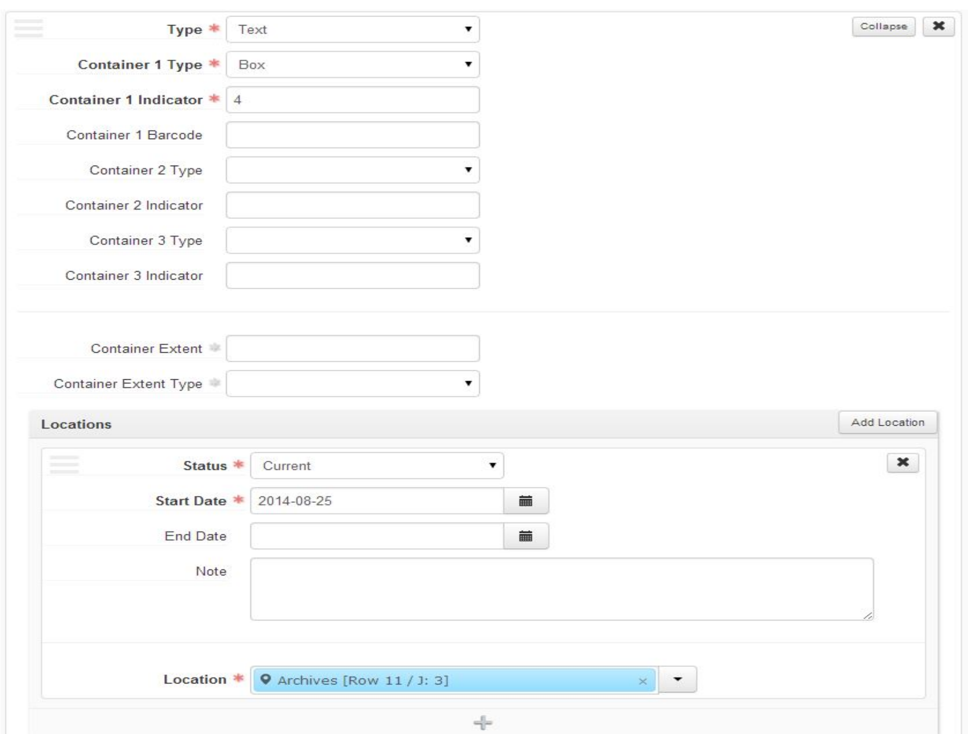
You'll see this:



Leave the **Status** at **Current**.

Click the **calendar** button (green arrow above) and choose the current date (it will be highlighted in blue)

In the **Location** box, type the word Row, then the row number / bay letter (so, Row 12 / K). A list of the shelves in that bay/row will appear. Click on the shelf you are adding the box to, and it will appear in the location line. Your screen will look something like this when you're done:



If you need to add another box to a different shelf, click on **Add Instance** and repeat these steps.

If you are done adding boxes, click the blue **Save** button (there's one at the top and bottom of the screen).

Don't forget that if you added a box/boxes, you will need to update the linear feet in the accession record, and you will need to update the number and type of boxes in the collection. See page 8 for instructions.

Section B: Editing existing box locations/adding a box to an existing shelf

If you have added a box to a shelf that already has boxes from that same collection on it, or if you moved boxes around, you do not have to create a new Instance in AS for that. Instead, you can edit the existing Instance(s) for the collection.

To do this, open the accession record for the collection in **Edit** mode (so click Edit instead of View when opening the record). Scroll down to the **Instances** section.

Click the **Expand** button(s) in the Instances section until you find the box(es)/location you need to edit.

Edit the box number(s) at that particular location by changing the number in the **Container 1 Indicator** field.

If you need to edit the location of the box, click the little x in the blue bar for the **Location** section, and type in the new row number and bay (as row 11 / K, for example) and select the correct row/bay/shelf from the results.

If you're done, click the blue Save button.

If you had to add a new box, or if you need to add a new shelf and cannot edit any existing Instances (like, for example, if you had three boxes on 13 / K / 2, but now boxes 1-2 are on 13 / K / 2 and box 3 is now on 13 / K / 3, you'll have to add a new Instance for box 3) you will have to follow the directions in Section A, which starts on page 9.

Don't forget that if you added a box/boxes or changed the box type for a box in the collection, you will need to update the linear feet in the accession record, and you will need to update the number and type of boxes in the collection. See page 8 for instructions.

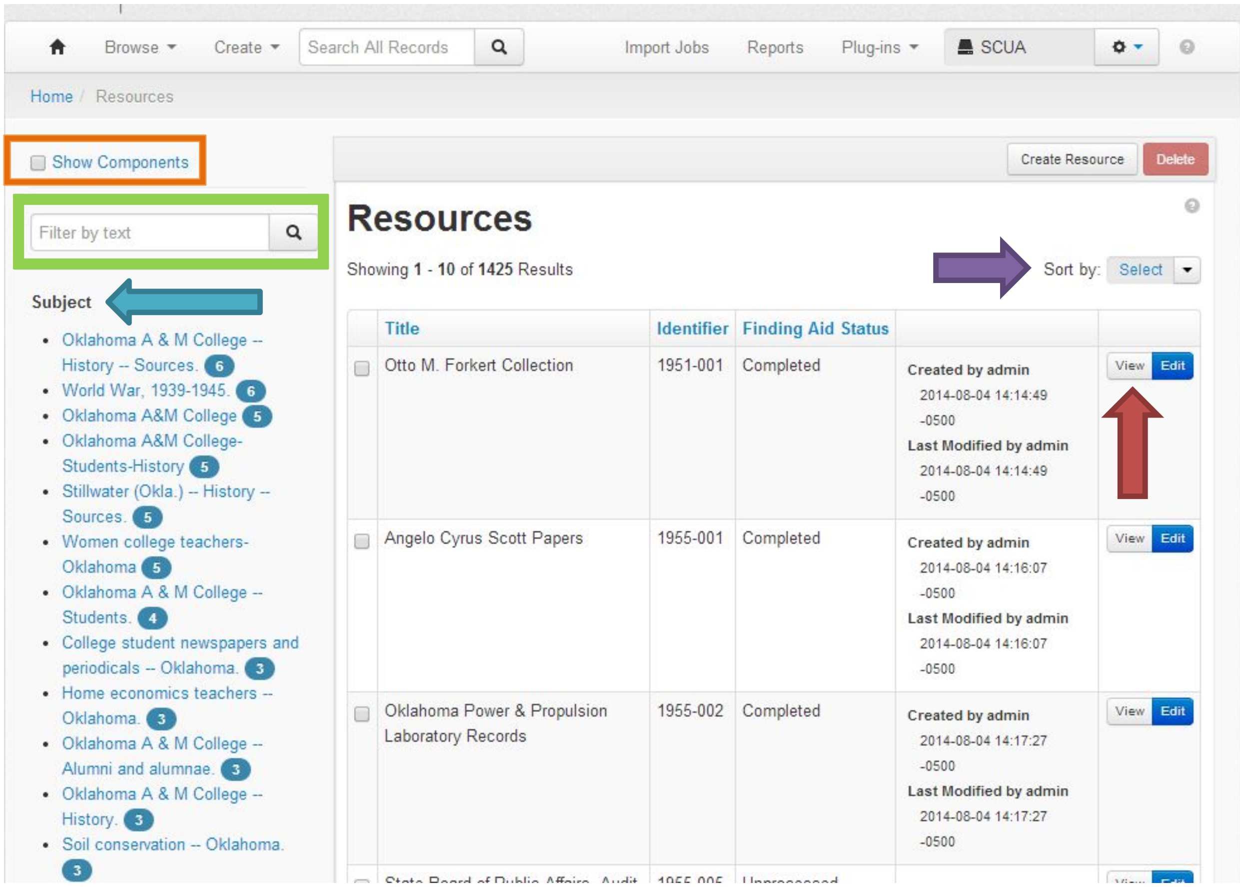
Resource Records

Resource records tell you what specifically is in a collection. These records include the finding aid for the collection and the notes about the collection (such as the Scope and Contents note, Biographical Sketch, etc.)

Accessing/searching Resource records

Just like accession records, resource records can be searched by keyword or by collection number (called the Identifier in AS). Once you're logged into AS, click the Click the **Browse** button on the upper left corner (see red arrow, above), and choose **Resources** from the dropdown menu. The list of Resources (Resources [or Resource records] are our finding aids) will appear. The Resources list has some things you should be aware of (see the screenshot on the next page for a visual aid to this list):

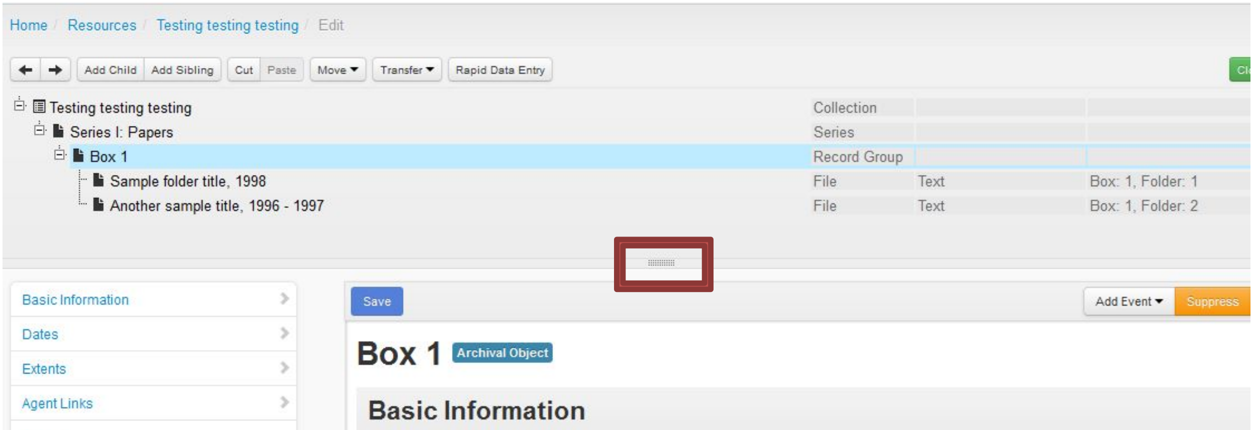
1) **Do not click the Show Components toggle box** (orange box below). It will bring up every folder, box, series, etc. in every collection in the Resources list, and you will be overwhelmed with information.
2) The **Filter by Text** box (green box below) is where you can search for a collection number, a name, anything you want. The filter will give you a results list that will show all Resources that match that term.
3) Clicking on a subject heading in the **Subject** list (blue arrow below) will take you to a result list that shows all Resources that have that subject heading linked to it.
4) The Resources list has the collection title, the collection number (which is the Identifier column), the finding aid status, the date the Resources record was created and edited, and finally, a view/edit column.
5) You can also sort the results by choosing a sort value from the **Sort by** dropdown menu (purple arrow below). You can sort by Title, Created date, Modified date, Identifier, and Finding Aid Status.
6) At the bottom of the screen, you will see a list of page numbers that you can click to advance to that page in the Resources list (not shown in screenshot).



Once you've found the resource record you want to look at, click the **View** button in the last column (see red arrow, above).

When the resource record opens, scroll down to view the notes about the collection (for example, the Scope and Contents note, or the Biographical Sketch).

The finding aid for the collection will be in the big grey box at the top of the screen. If you can't see the folders/box/series, just click on the dots on the little grey bar at the bottom of the grey box and drag down (see red box below on screenshot on next page). This will expand the grey box. Double click the plus sign next to the Series, box, folder, etc. to expand the list. As you can see on the screen shot below, the box and folder number and information about the materials in that folder will appear once you expand the appropriate box/series.



If you need to edit/update the finding aid, see the Creating Finding Aids in ArchivesSpace manual in V:\Manuals and Guides\ArchivesSpace.