ArchivesSpace Manual for Special Collections (v.1.7.0)

University Libraries at Virginia Tech

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May 2016

Version/Change Log:
- September 2019-March 2020(v.1.7.0): Major revisions were made to the best practices for finding aids for DACS compliance, as well as incorporation of departmental name change to Special Collections and University Archives. Overhauled and expanded "Resources>Creating a New Resource Record>Notes" section and "Appendix A: Note Order." Please note: The section on Digital Objects has temporarily been removed for further work while we change and document our workflows.
- November 2018 (v.1.6.3): Updates to language about replacing "Historical Note" with "Administrative History" and Scope and Content being singular (DACS compliance issues)
- August 2018 (v.1.6.2): Minor addition to section on Locations with instructions on how to find the location information of a collection or part of a collection.
- February 2018 (v.1.6.1): Minor clarification on page 52-53 re: exporting finding aids
- August 2017 (v.1.6): Updated to reflect new elements of ArchivesSpace 2.1.0; new procedures re: Agents and Classifications; minor deletion regarding use of EAD FA Location and FA Subtitle fields.
- May 2017 (v.1.5.1): Updated to reflect new option for Accession Restriction note & some minor clarifications added regarding the use of optional/as-needed notes.
- March/April 2017 (v.1.5): Updated to reflect usage of ArchivesSpace 1.5.x
- August 2016 (v.1.4): Modification of section on Creating Locations to update for new procedures
- July 2016 (v.1.3): Changes to the formatting of Instances due to impending migration to version 1.5.0
- June 2016 (v.1.2): Minor updates & clarifications

- May 2016: Adapted & Revised from Archivists' Toolkit Manual v.1.2

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INTRODUCTION

For the sake of convenience, ArchivesSpace will be abbreviated as ASpace throughout the manual.

This manual is a revision and adaptation of the existing Archivists' Toolkit (v.1.2) manual and is a "how-to" for specific use of ASpace at Virginia Tech Special Collections and University Archives. This manual will cover the fields ASpace requires for the creation of records, as well as the fields required and optional for Special Collections, according to our best practices.

Throughout the manual, internal links have been added to redirect users to other relevant sections.

GETTING STARTED/LOGGING IN

ASpace is a web-based application and can be accessed from any computer in the department, as well as from laptops and other devices on a wireless connection. To log in, go to https://staffspace.its.lib.vt.edu/. You will log in using your PID and password.

Please note: ArchivesSpace uses 2-factor authentication, but it does not work the same as other university applications. If your 2-factor authentication process does not default to prompting you via DuoMobile or through a text message, you will need a separate login (our current bypass around the system)—talk to someone with administrative access to get a local login.

The first time you log on, you should see a screen with the ASpace logo, "Welcome to ArchivesSpace" and you may see the message that you do not have access to any repositories. Please let Kira know when you have logged in if you don't have access to the repository (SC) so you can be added to the appropriate group(s).

ASpace also has a public interface. Researchers (and staff) can access this from anywhere to search our finding aids and descriptive records. The public interface is located at https://aspace.lib.vt.edu/.

MODULES

The remainder of the manual will provide details of the individual ASpace modules, but here is a brief overview of our use of them Special Collections. ASpace contains nine different modules: Accessions, Resources, Digital Objects, Subjects, Agents, Locations, Events, Collection Management, and Classifications.

The Agents module is for recording the names (personal, corporate body, or family) associated with accessions, resources, and/or digital objects as a creator, source, or subject. ASpace users may also be considered "agents" and can be associated with accession, resource, digital object, and event records. The agent records serve as name headings in exports such as EAD. ASpace is also capable of exporting a number of other formats (MARC, METS, or MODS), but our main interest is in producing DACS-compliant EAD finding aids and EAC-CPF records.

The Subjects module is for describing topical terms associated with an accession, a resource, or a digital object. They can also be associated with external documents. The subject records serve as subject headings in exports.

The Accessions module is for recording accessions and basic collection data. Accessions also include links to related agents, subjects, accessions, resources, digital object, event, and collection management records, as well as to external documents.

The Resources module is for describing an item or collection of items in a standard multi-level manner. The resource record contains information on resource components, digital objects, and material instances (e.g. text vs. microform vs. digital object). Resources also include links to related agents, subjects, accessions, events, and collection management records, as well as to external documents. Resource records may be exported as EAD or MARC.

The Digital Objects module is for describing a digital object or collection of digital objects. They are not required to be linked to a resource, but they can be. They can also be generated from within a resource record. Digital Object records also contain information on the location of the actual digital object (i.e., on the web or in a shared folder). **Please note:** the ASpace database does not store the digital object itself, only the location and metadata. Digital Object records also include links to agent, subject, accession, resource, other digital object, event, and collection management records. These records may be exported as part of an EAD record, or independently in METS, MODS, or Dublin Core formats.

The Events module is used to create records that document an action taken on another type of record. They can be used to denote a wide variety of actions from the sending and receipt of a deed of gift to the decryption of electronic records to the date on which a collection was processed. More information will be provided in the section on "Event Records" below. Creating event records generates Collection Management records, which can be edited from within a record or from the Collection Management module.

USERS/ACCESS CLASSES

ArchivesSpace allows access to database records at many different levels, each of which has unique permissions. When you first got access to the repository, you were assigned to a group, based on your expected tasks. However, if you find your permissions are not allowing you to complete the tasks you need to in ASpace, let someone with Repository Manager level (administrative) access know (Kira, Marc, or Sam). Permissions can be changed relatively easily.

AGENTS

Special Collections is using the Agents module to link persons, families, and corporate bodies as sources, creators, and subjects. (**ASpace considers persons, families, and corporate bodies that are *subjects* as Agents, too**). Sources, creators, and subjects can be linked to Accession, Resource, and Digital Object records. Depending on the role of the name (source, creator, or subject), the required fields may be different. This section includes directions on how to create a name, what fields are necessary, and how to link names to the appropriate records.

Agents may also be linked to Event records, but in this case, the Agent would be the person taking action on the existing record (i.e. Special Collections staff or students).

Since any Agents/names linked to a Resource or Digital Object record will be displayed in exported EAD, **DO NOT** link sources (donors or dealers) to a Resource or Digital Object record. Sources (donors or dealers) should **ONLY** be linked to Accession records, which are not seen by the public.

Please note: You may also create Agent records during the process of creating an Accession, Resource, Digital Object, or Event record.

Many Agents are linked to different records for different reasons (an Agent can be both a source and a subject or creator). Address information does NOT appear in the public interface and we do not publish Accession records, so Agents will not show up in linked relationships with those. **We only publish Agent records for names that are creators or subjects of records. If a source (donor) is also a subject or creator, their record should be public. Otherwise, donor and dealer Agents should remain unpublished.**

FINDING/VIEWING/EDITING AN AGENT RECORD

1. From the main screen, select Browse and Agents.
2. Type any part of the personal name, family name, corporate body, or other agent in the Filter by text box in the upper right corner and click the magnifying glass icon. To view a record, click on View. To edit a record, click on Edit.
3. If you are making changes to a record, be sure to click Save before closing.

CREATING AGENT RECORDS

CREATING A RECORD FOR A PERSON

1. From the main screen, select Create and Agent.
2. Select Person from the menu.
3. Check the Publish? box unless the person is a donor or book dealer.
4. If you have exact or approximate birth date (s) or death date(s), click on Add Date next to the Dates of Existence.
   a. Leave Existence in the Label field.
   b. Select the type:
      i. Single for a birth or death date
      ii. Range for a birth and death date.
   c. Input the date(s). Include as much information as you have.
   d. If you have dates other than birth or death (i.e. "fl" or "c."), put those in the Expression field.

     e. If your date or dates are approximate, select "Approximate" from the Certainty field. Otherwise, do not select an option.
     f. Select "ce" from the Era field.
     g. Select "Gregorian" from the Calendar field.
5. Under the Name Forms section, the following fields are required for all entries (donors, dealers, creators, subjects): Source, Primary part of name, Rest of name,
     a. Source=NACO, if the form of name used comes from Library of Congress Subject Headings Name Authority File (NAF). Source=Local, if the form of name is created by you. Locally created records should be DACS (Describing Archives: A Content Standard) compliant. If you need help, ask Kira!
          i. If you use an authoritative source, please include the Authority ID. For NACO, this is usually an "n" followed by a number (i.e. n50023560). For the ULAN, this is usually a long number (i.e. 500031066).
     b. For individuals, Name Order should be left as Indirect.
     c. Primary name= Last name
     d. Rest of name=First and middle/maiden names or initials
     e. Dates=known birth and/or death dates (i.e. "b. 1863" or "1753-1808" or "c.1809-1900" or "d.1987" etc.). This should be the same information included in the Dates of Existence above.
     f. We will be looking into the use of a plug-in for searching and importing NACO forms of names, so stay tuned for more information on that.
6. Optional fields (based on information available): Title, Suffix, Fuller Form, Number, and Qualifier.
     a. A Suffix or Number should be included, if a name has any of these.
     b. Qualifier should be used if another Agent record exists with the same name—name entries MUST be unique. If there is no fuller form of a name or related dates available for an identical entry, a location or title may be used to differentiate one record from another. Exs. Captain (for Brown, George, Captain) or of Falls Church, Va. (for Baker, Miss, of Falls Church, Va.).
     c. If the personal name is a dealer (bookseller, auctioneer, etc.), please put "Dealer" in the qualifier field.
     d. Fuller Form=a more complete version of a name, useful for distinguishing between similar names.
7. You may include non-preferred or non-authoritative forms of names, if they exist. Click the Add Name Form at the top of the Name Forms box and a new section will appear below the name you have already input.
8. If the individual is a donor, dealer, or transferring agent, click on Add Contact.
     a. Fill in any contact information from the deed of gift or invoices.
     b. URLs for dealers can be added using the Notes.
9. If you have done research for a biographical note while processing the collection, this information should be added to the Agent Record, too. (Or, you can come back and do this later.)
     a. There will be a placeholder Biographical Note containing "…".
     b. Click on the note to expand it.
     c. Leave the label as Biographical Note.
     d. Type of copy/paste your note text (you can copy an existing biog/hist note, selectively copy from an existing one, or create a new one).
     e. If you have sources to cite, click Add Sub Note.
     f. Select Citation.
     g. Click Publish box.

    h.   Enter the citation in the text box.
10. If there is an established relationship between Agents of any kinds (persons, families, or corporate bodies), you can use the Related Agents section.
    a.   Select the type of relationship: Parent/Child (familial, hierarchical); Earlier/Later (temporal), or Associative (all other relationships). See the EAC Tag Library for additional information on relationships.
    b.   Depending on which type of relationship you select, you may need to make an additional choice in the Relationship Type field.
    c.   Search for the related Agent.
    d.   If there are established dates of the relationship, click on Add Date and add appropriate information.
    e.   Repeat for additional Related Agents.
11. If you are adding another Agent record, click +1 and continue. If you are finished creating records, click Save.

CREATING A RECORD FOR A CORPORATE BODY

1. From the main screen, select Create and Agent.
2. Select Corporate Body from the menu.
3. Check the Publish? box unless the corporate entity is a donor or book dealer.
4. If you have exact or approximate dates, click on Add Date next to the Dates of Existence.
    a.   Leave Existence in the Label field.
    b.   Select the type: Single or range.
    c.   Input the date(s). Include as much information as you have.
    d.   If you have dates other than dates the entity was in existence or active (i.e. "fl" or "c."), put those in the Expression field.
    e.   If your date or dates are approximate, select "Approximate" from the Certainty field. Otherwise, do not select an option.
    f.   Select "ce" from the Era field.
    g.   Select "Gregorian" from the Calendar field.
5. Under "Name Forms" the following fields are required for all entries (donors, dealers, subjects): Primary name and Source.
    a.   Primary name= most general name, i.e. United States. (for United States. Congress. Joint Committee on the Library.)
    b.   Source=NACO, if the form of name used comes from Library of Congress Subject Headings (LCSH). Source=Local, if the form of name is created by you or by another standard (i.e. DACS)
        i.   If you use an authoritative source, please include the Authority ID. For NACO, this is usually an "n" followed by a number (i.e. n50023560). For the ULAN, this is usually a long number (i.e. 500031066).
6. Optional fields (based on information available): Subordinate 1, Subordinate 2, Number, Dates, and Qualifier.
    a.   Subordinate 1 may be used include smaller organizational units within the larger corporate body, i.e. Congress. (for United States. Congress. Joint Committee on the Library.). Subordinate 2 may be used to include the name of an entity within Subordinate 1, i.e. Joint Committee on the Library (for United States. Congress. Joint Committee on the Library.).
    b.   Number=the number of meeting.
    c.   Dates may be used to distinguish one corporate name from another, i.e. 1966 (for Belgian-Netherlands Antarctic Expedition (1966)).

d. Qualifier may be used to distinguish one corporate name from another of the same name. Qualifier may be a place or a descriptor, i.e. Richmond, Va.) in Meade and Baker Apothecary. (Richmond, Va.).
e. If the corporate body is a dealer (bookseller, auctioneer, etc.), please put "Dealer" in the qualifier field.

7. You may include non-preferred or non-authoritative forms of names, if they exist. Click the Add Name Form at the top of the Name Forms box and a new section will appear below the name you have already input.
8. If the corporate body is a donor, dealer, or transferring agent, click on Add Contact.
a. Fill in any contact information from the deed of gift or invoices.
b. URLs for dealers can be added using the Notes.
9. If you have done research for a biographical note while processing the collection, this information should be added to the Agent Record, too. (Or, you can come back and do this later).
a. Click on Add Note.
b. Select Biographical/Historical.
c. Fill in the appropriate label as Administrative Information.
d. Check the Publish box.
e. Type of copy/paste your note text (you can copy an existing biog/hist note, selectively copy from an existing one, or create a new one).
f. Click Publish box (below the text box).
g. If you have sources to cite, click Add Sub Note.
h. Select Citation.
i. Click Publish box.
j. Enter the citation in the text box.
10. If there is an established relationship between Agents of any kinds (persons, families, or corporate bodies), you can use the Related Agents section.
a. Select the type of relationship: Parent/Child (familial, hierarchical); Earlier/Later (temporal), or Associative (all other relationships). See the EAC Tag Library for additional information on relationships.
b. Depending on which type of relationship you select, you may need to make an additional choice in the Relationship Type field.
c. Search for the related Agent.
d. If there are established dates of the relationship, click on Add Date and add appropriate information.
e. Repeat for additional Related Agents.
11. If you are adding another Agent record, click +1 and continue. If you are finished creating records, click Save.

CREATING A RECORD FOR A FAMILY

1. From the main screen, select Create and Agent.
2. Select Family from the menu.
3. Check the Publish? box unless the family is a donor or book dealer.
4. If you have exact or approximate dates, click on Add Date next to the Dates of Existence.
a. Leave Existence in the Label field.
b. Select the type: Single or range.
c. Input the date(s). Include as much information as you have.
d. If you have dates other than dates the entity was in existence or active (i.e. "fl" or "c."), put those in the "Expression" field.

e. If your date or dates are approximate, select "Approximate" from the Certainty field. Otherwise, do not select an option.
f. Select "ce" from the Era field.
g. Select "Gregorian" from the Calendar field.

5. Under the "Name Forms," the following fields are required for all entries (donors, dealers, subjects): Family name and Source.
    a. Family name=last name + "family," i.e. Crowder family.
    b. Source=NACO, if the form of name used comes from Library of Congress Subject Headings (LCSH). Source=Local, if the form of name is created by you or by another standard (i.e. DACS)
        i. If you use an authoritative source, please include the Authority ID. For NACO, this is usually an "n" followed by a number (i.e. n50023560). For the ULAN, this is usually a long number (i.e. 500031066).

6. Optional fields (based on information available): Prefix, Dates, and Qualifier.
    a. Prefix=any prefix attached to the last name, i.e. de (for de Beers).
    b. Qualifier may be used to distinguish between two similar family names. Qualifier may be an occupation, nationality, or location, i.e. Winemakers (for Charron-Lecorre family (Winemakers)).
    c. If the family is a dealer (bookseller, auctioneer, etc.), please put "Dealer" in the qualifier field.

7. You may include non-preferred or non-authoritative forms of names, if they exist. Click the Add Name Form at the top of the Name Forms box and a new section will appear below the name you have already input.

8. If the family is a donor, dealer, or transferring agent, click on Add Contact.
    a. Fill in any contact information from the deed of gift or invoices.
    b. URLs for dealers can be added using the Notes.

9. If you have done research for a biographical note while processing the collection, this information should be added to the Agent Record, too. (Or, you can come back and do this later).
    a. Click on Add Note.
    b. Select Biographical/Historical.
    c. Fill in the label as Biographical Note.
    d. Check the Publish box.
    e. Type of copy/paste your note text (you can copy an existing biog/hist note, selectively copy from an existing one, or create a new one).
    f. Click Publish box (below the text box).
    g. If you have sources to cite, click Add Sub Note.
    h. Select Citation.
    i. Click Publish box.
    j. Enter the citation in the text box.
    k. If you have separate biographical information on different family members, they should have their own Person Agent records, but you can also give family members their own biographical note in the Family Agent record.
        i. Add separate bio notes.
        ii. Label each as "Biographical Note: [name of person].

10. If there is an established relationship between Agents of any kinds (persons, families, or corporate bodies), you can use the Related Agents section.
    a. Select the type of relationship: Parent/Child (familial, hierarchical); Earlier/Later (temporal), or Associative (all other relationships). See the EAC Tag Library for additional information on relationships.

b. Depending on which type of relationship you select, you may need to make an additional choice in the Relationship Type field.
c. Search for the related Agent.
d. If there are established dates of the relationship, click on Add Date and add appropriate information.
e. Repeat for additional Related Agents.
11. If you are adding another Agent record, click +1 and continue. If you are finished creating records, click Save.

DELETING AN AGENT RECORD

Please note: Deleting a Name record is different from removing a link to a Name record. Deleting a Name record will delete the record, as well as the links to any Accession, Resource, or Digital Object records. To remove a LINK to an Agent record, see "Removing an Agent Link" below.

1. From the main screen, select the Agents module.
2. Search for and select the Agent(s) you wish to delete.
3. Check the box(es) next to the name(s). Click on the Delete button near the top of the screen.
4. ASpace will confirm you wish to delete before completing the action.
5. Click Delete Records to proceed.

LINKING AGENTS

Agents may be linked to Accession, Resource, Digital Object, and Event records. You may create an Agent record in the Agents module, but you can only link a name from the Accession, Resource, Digital Object, or Event record. There are three options for assigning an agent to an Accession, Resource, Digital Object, or Event record. You may add the name as a source for the materials, as a creator of the materials, or as a subject documented in the materials. In addition to these functions, you may further refine information about the entity's relationship to the materials by recording a role for a creator, source, or subject, and by adding a form subdivision to a subject. Names linked to a Resource or Digital Object record will appear in exported EAD file.

LINKING AN AGENT RECORD TO AN ACCESSION RECORD

Please note: ASpace does not require linked Agents for Accession records, but Special Collections will be using them to track acquisition information. Whenever possible, link **AT LEAST** one Source and one Creator to a record.

1. If you are in the process of creating an Accession record, click on Agent Links. If you are adding Agents to an existing record, open the relevant Accession record and click on Agent Links.
2. Click on Add Agent Link.
3. Search for an existing name **OR** browse/create a new name using arrow next to the Agent field. Follow the directions above to create a new Agent record.
4. Select the role of the Agent from the drop-down list (Source, Creator, or Subject).
5. For names that are Sources, please specify the Role. If the Source is donor, select Donor. If the Source is a dealer, select the closest role (i.e. Bookseller, Auctioneer, or Collector).
6. For names that are Creators, Role is not required.
7. For names that are Subjects, Role and Form Subdivision are not required.
8. You may use a name more than once in a record, i.e. if the name is both a Source and a Creator, but you will have to link it separately for each function.

9. If you are still creating the record, click Save, then continue working on the accession. If you are finished, click Save Accession.

LINKING AN AGENT RECORD TO A RESOURCE OR DIGITAL OBJECT RECORD

Please note: ASpace does not require linked Names for Resource or Digital Object records, but they will be useful to our researchers, so include them whenever possible.

1. If you are in the process of creating a Resource or Digital Object record, click on Agent Links. If you are adding names to an existing record, open the relevant record and click on Agent Links.
2. Click on Add Agent Link.
3. Search for an existing name **OR** browse/create a new name using arrow next to the Agent field. Follow the directions above to create a new Agent record.
4. Select the role of the name from the drop-down list (Creator or Subject). **DO NOT** link Sources to Resource or Digital Object records, otherwise donor/dealer information will appear in a finding aid.
5. For names that are Creators, Role is not required.
6. For names that are Subjects, Role and Form Subdivision are not required.
7. You may use a name more than once in a record, i.e. if the name is both a Source and a Creator, but you will have to link it separately for each function.
8. If you are still creating the record, click Save, then continue working on the accession. If you are finished, click Save Resource or Save Digital Object.

LINKING AN AGENT TO AN EVENT RECORD

1. If you are in the process of creating an Event record, click on the Agent Links. If you are adding Agents to an existing record, open the relevant Event record and click on Agent Links.
2. Click on Add Agent Link.
3. Search for an existing name **OR** browse/create a new name using arrow next to the Agent field. Follow the directions above to create a new Agent record.
4. Select the role of the Agent from the drop-down list.
5. You may use a name more than once in a record, i.e. if the name is both a Source and a Creator, but you will have to link it separately for each function.
6. If you are still creating the record, click Save, then continue working on the accession. If you are finished, click Save Event.

REMOVING AN AGENT LINK

Removing an Agent link eliminates the link between an Agent record and an Accession, Resource, Digital Object, or Event record. This is **NOT** the same as deleting a whole Agent record. If you wish to delete an Agent record, see "Deleting an Agent Record" above. If you have created a Resource record from an Accession record, this is how to remove the linked Agent with the function Source.

Please note: if you remove an Agent from one type of record, this does not mean it will automatically be removed from all related records (i.e. removing an Agent as Source from a Resource record does not remove that Agent from an Accession or Digital Object record). To be sure you have removed an Agent from all relevant records, you may need to locate the original Agent record and see to which records it is linked.

1. Depending on where you wish to remove the link, open the appropriate Accession, Resource, or Digital Object record (the directions are the same for all three record types).
2. Click on Agent Links.
3. Click on the "x" in the box for the Agent.
4. Click on Remove Name Link. Click on Confirm Removal.
5. Save the record.

FILTERING/VIEWING AGENT RECORDS
1. Each module in ASpace has a Filter by text box in the upper left corner.
2. To find a particular Agent record, type part of the Agent name in the box and hit Enter or click on the search icon.
3. Alternatively, you may use the facets on the left-hand side to find or local Agent records.
4. To view an Agent record, click on the View button to the right. To edit an Agent record, click on the Edit button.
5. If you are editing, be sure to Save Person/Corporate Entity/Family to save your changes.

SUBJECTS

ArchivesSpace allows you to create and manage ten different types of subject access points: Cultural context, Function, Genre/Form, Geographic, Occupation Style/Period, Technique, Temporal, Topical, and Uniform Title. Agents (persons, corporate bodies, or families) that are related to Resources or Accessions as subjects should be entered as an Agent record, even if they have topical divisions.

While you cannot link broader, narrower, or related terms in ASpace, each subject can have a scope note detailing how it should be used locally. For now, creating and linking Library of Congress Subject Headings (LCSH) is optional (you will have to create these as you need them). However, Special Collections and University Archives has created a number of local subject headings to link to Accessions, Resources, and Digital Objects which should help our researchers in searching collections and descriptions.

That being said, you **DO NOT** need to add local subject headings for every collection you put into ASpace. Special Collections and University Archives is using the "Local Sources" headings specifically to help searching and grouping of collections by patrons and staff. If you wish to add a significant local subject heading (i.e. not in LCSH or AAT), please list the source as "Local sources." If you are a student and have a term that you think might make a useful local heading for an active collecting area, talk to the staff member supervising your project.

Please note: You may also create a Subject record during the process of creating an Accession, a Resource or a Digital Object record.

FINDING/VIEWING/EDITING A SUBJECT RECORD

1. From the main screen, select Browse and Subjects.
2. To find a particular Subject record, type part of the subject in the filter box and hit "enter" or click on the search icon.
3. To open a record, click View. This will show you any scope note relating to the Subject heading as well as records to which the heading is linked.
4. If you are making changes to a record, be sure to click Save Subject.

CREATING A SUBJECT RECORD

1. From the main screen, select Create and Subject.
2. Required fields for subjects: Source, Term, and Type.
    a. Select the source from the drop-down menu.
        i. Use "Local Sources" for any non-authoritative subjects.
        ii. If you are using an authoritative source, please include the Authority ID whenever possible. For LSCH, this is usually "sh" followed by a number (i.e. sh85000002). For AAT, this is usually just a number (i.e. 300193993). For other sources, it may be different, but should be fairly obvious.
    b. If your heading is a local heading, type it into the Term box. If the heading comes from an existing source (LCSH or AAT, for example), it is probably easiest to copy and paste it into the box.
    c. Select the appropriate Type from the drop-down menu.
3. Optional field: Scope Note.
    a. If you are creating a local heading, it may be helpful to others to write a scope note, defining when or how the heading should be used.
4. If you are adding another heading, click +1. If you are done adding headings, click Save Subject.

Deleting a Subject Record

Please note: Deleting a Subject record is different from removing a link to a Subject record. Deleting a Subject record will delete the record, as well as the links to any Accession, Resource, or Digital Object records. To remove a **LINK** to a Subject record, see "Removing a Subject Link" below.

1. From the main screen, select the Browse and Subjects.
2. Filter/search for and select the Subject(s) you wish to delete. Check the box(es). Click on the Delete button near the upper right.
3. ASpace will confirm you wish to delete before completing the action.
4. Click Delete Records to proceed.

Linking Subjects

Local or other subject headings (i.e., Library of Congress Subject Headings or Art and Architecture Thesaurus Headings) may be linked to Accession, Resource, and Digital Object records. You may create a Subject in the Subjects module, but you can only link a subject from an existing record. Once a subject term is assigned, it will appear in the Accession, Resource, or Digital Object record and in any Accession, Resource, or Digital Object reports that make use of subject terms. For example, the subject term will be included in MARC and EAD outputs for that Resource record.

Linking Subjects to Accession Records

Please note: If you create a Resource record from an Accession record, any names and subjects linked to the Accession record will transfer to the Resource record.

1. If you are in the process of creating an Accession record, click on Subjects. If you are adding Subjects to an existing record, open the relevant Accession record and click on Subjects. Click on Add Subject.
2. Filter for an existing Subject and select one OR click on the arrow to the right of the box to browse or to create a new subject and follow the directions above for creating a new Subject record.
3. Link any and all relevant local headings, as well as any authoritative headings.
4. If you are still creating the record you can continue working on the record. If you are finished, click "Save Accession."

Linking Subjects to Resource or Digital Object Records

Please note: AT does not **require** linked Subjects for Resource or Digital Object records, but as Special Collections staff and researchers use them for a variety of reasons, Subjects should be linked whenever possible.

1. If you are in the process of creating a Resource or Digital Object record, click on Subjects. If you are adding subjects to an existing record, open the relevant record and click on Subjects.
2. Click on Add Subject.
3. Filter for an existing Subject and select one OR click on the arrow to the right of the box to browse or to create a new subject and follow the directions above for creating a new Subject record.
4. Link any and all relevant local headings, as well as any authoritative headings.
5. If you are still creating the record, you can continue working on the record. If you are finished, click Save Resource/Digital Object.

REMOVING A SUBJECT LINK

Removing a Subject link eliminates the link between a Subject record and an Accession, Resource, or Digital Object record. This is NOT the same as deleting a whole Subject record. If you wish to delete a Subject record, see "Deleting a Subject Record" above.

Please note: if you remove a Subject from one type of record, this does not mean it will automatically be removed from all related records (i.e. removing a Subject from a Resource record does not remove that Subject from an Accession or Digital Object record). To be sure you have removed a Subject from all relevant records, you may need to locate a Subject record and see to which other records it is linked.

1. Depending on where you wish to remove the link, open the appropriate Accession, Resource, or Digital Object record (the directions are the same for all three record types).
2. Click on Subjects.
3. Click on the "x" in the box for the Subject.
4. Click on Remove Subject Link. Click on Confirm Removal.
5. Save the record.

LOCAL SUBJECT HEADINGS

In order to make searching and grouping finding aids easier, Special Collections has implemented a number of "Local" subject headings. When creating Accession, Resource, or Digital Object Records, please link as many local headings as are applicable to a collection.

An alphabetical list of local headings follows (headings in **bold**), as well as any special instructions relating to the use of a heading. A definition of a heading can also be viewed by going to the Subject module and double-clicking on a heading. Special instructions are located in the Scope Note.

- **Ann Hertzler Children's Cookbook and Nutrition Literature Collection.** If using this heading, please use History of Food and Drink, too.
- **Archives of American Aerospace Exploration (AAAE)**. If using this heading, please use Science and Technology, too.
- **Blacksburg (Va.)**. If using this heading, please use Blacksburg, Va (LCSH), Montgomery County (Va.) and Local/Regional History and Appalachian South, too.
- **Civil War**
- **Cocktail History Collection.** If using this heading, please use History of Food and Drink and Cocktails—History (LCSH), too.
- **Faculty**. If using this heading, please use University History. Use University Archives when appropriate.
- **Food Technology and Production**. If using this heading, please use History of Food and Drink, too.
- **History of Food and Drink**. Use this heading for collections that relate to the Culinary History Collection, the Peacock-Harper Collection, the Ann Hertzler Children's Cookbook and Nutritional Literature Collection, Cocktail History materials, and any materials related to social, economic, and domestic aspects of food and drink history.
- **International Archive of Women in Architecture (IAWA)**
- **Local/Regional History and Appalachian South**. Use for collections relating to Blacksburg, Montgomery County, Southwest Virginia, West Virginia, and Appalachia.
- **Montgomery County (Va.)**. If using this heading, please also use Local/Regional History and Appalachian South.

- **Railroad**
- **Science and Technology**
- **Speculative Fiction**
- **University Archives.** If you use this subject heading, please use University History, too.

MERGING AGENTS OR SUBJECTS

In some cases, duplicate names or subjects may have been created (often through importing data). If you find or have accidently created a duplicate Agent or Subject, you can merge one record into the other.

1. From the main screen, click Browse and the module (Agents or Subjects).
2. Find the record you wish to merge the duplicate heading INTO. (This will become the singular heading.)
3. Click the Merge button at the top of the window.
4. Search for the record you would like to merge.
5. Click on the record you wish to merge. In other words, the record you select will be deleted.
6. Click on Merge.
7. ASpace will ask if you are sure you wish to merge. Click Merge.
8. Any records that were linked to the duplicate record will now be linked to the merged record.

LOCATIONS

As of ArchivesSpace 2.6.x, managing locations is no longer a permission defined at a granular level, meaning it can only be allowed in conjunction with a variety of other permissions. If you do not have the ability to add, edit, or delete locations, either talk to Kira or work with someone who can manage locations (Kira, Marc, Sam, or Laurel).

ADDING A LOCATION

1. Click on Create, Location, and Add Single Location.
2. If this is a temporary location, check the box and indicate the temporary location.
3. Building=Newman.
4. Floor=1st.
5. Room and Area are optional, but can be useful in specifying a location that is not clearly marked (i.e. "Nevada" in Area indicates the room under the skylight/up the ramp from the back of the Rare Book Room).
6. Building and Coordinate Label 1 is required for a location. In most cases, the building and coordinate are standard for Special Collections locations. Special Collections does not use the barcode field, as we do not link barcodes to locations.
7. For a standard location,
   a. Put the alphabet part of the location sequence in the Coordinate 1 Label field (i.e. ACR, AR, or MR).
   b. Put the location, with the parts separated by "/" in the Container Indicator 1 field (i.e. MR/14/A6).
8. For map case locations,
   a. Put "Map Case" in the Coordinate 1 Label field.
   b. Put the map case number in the Coordinate 1 Numeric Indicator.
   c. Put "Drawer" in the Coordinate 2 Label field.
   d. Put the drawer number in the Coordinate 2 Numeric Indicator.
9. If a location does not have coordinates (i.e. ACR/2/J2), enter a room number in the Classification Number field (i.e. 1010A).
10. Location Profiles can track the used and available space for a given location. We have not implemented them at this time, so you can ignore this field.
11. We currently only have a single repository, but you should link your new location to it.
    a. Click on the arrow next to the Repository field.
    b. Select Browse.
    c. Click on the radio button, then Link to Repositories
12. You do not need to add a Function.
13. Once you have filled in the appropriate fields, if you want to add another record, click the +1 button. If you are finished adding location records, click Save Location.

CREATING BATCH LOCATIONS

Batch add allows you to add a series of sequential location records. This can be useful for adding map case locations. However, you CANNOT batch add locations that contain an alphanumeric. So, it does not help much for adding ACR, AR, NV, or MR locations.

1. Click on Create, Location, and Create Batch Locations.
2. If this is a temporary location, check the box and indicate the temporary location.
3. Building=Newman
4. Floor=1st

5. Room and Area information are optional, but may be entered here. **Please note:** This information will show up in ALL location records added in this batch, so if not all locations are in the same Room or Area, DO NOT fill in these fields.
6. Enter Coordinate 1 label.
7. Enter the start and end number.
8. Enter Coordinate 2.
9. Enter the start and end number.
10. If you have a Coordinate 3, enter is with the start and end numbers.
11. For example, if you put "Map Case" in Coordinate 1 with 39 in the Start and 45 in the End, and "Drawer" in Coordinate 2 with 1 in the Start and 5 in the End, clicking Generate would create a total of 35 new location records for Drawers 1-5 in Map Cases 39-45: i.e., Map Case 39/Drawer 1, Map Case 39/ Drawer 2, Map Case 39/ Drawer 3, etc., through Map Case 45/Drawer 5.
12. Location Profiles can track the used and available space for a given location. We have not implemented them at this time, so you can ignore this field.
13. We currently only have a single repository, but you should link your new location to it.
    a. Click on the arrow next to the Repository field.
    b. Select "Browse.
    c. Click on the radio button, then Link to Repositories.
14. You do not need to add a Function.
15. Click Preview Locations.
16. If the preview is correct, click Continue to generate the records. If the preview is incorrect, click on the "x" in the upper right and make corrections
17. You should now be able to filter for your newly created records.

EDITING A LOCATION
1. Click on Browse and Locations.
2. Filter for the location by entering any combination of the coordinates, as well as room and area information. Use spaces to indicate breaks if you are entering entire coordinates (i.e. "acr 2 j4").
3. Click Edit to open the location.
4. Make any changes, and then click Save Location.

REMOVING A LOCATION
1. Filter for the location by entering any combination of the coordinates, as well as room and area information. Use spaces to indicate breaks if you are entering entire coordinates (i.e. "acr 2 j4").
2. Click on View to open the location and see if any other records are linked to the location.
3. If necessary, go to any linked Accession or Resource instances and break the tie to the location.
    a. For Accessions, open the record, click on Instances, and either assign the instance to a new location or click on the "x" in the corner and confirm removal.
    b. For Resource instances, open the resource record, and select the instance from the components.   Click on Instances, and either assign the instance to a new location or click on the "x" in the corner and confirm removal.
4. Navigate back to the Location record.
5. Click Edit.
6. Click Delete. Confirm Delete.

MANAGING LOCATIONS IN ACCESSION AND RESOURCE RECORDS

Once you have created Instances for an Accession or Resource record or record components, you can link them to our available locations in Special Collections or to off-site storage generally. You can also change or remove a link between an Instance and a location.

To Link to a Location (Accessions)

In ArchivesSpace 1.5.x, adding location information is tied to the creation of a Top Container. If you want to link an Accession to a location, see "Instances & Digital Objects" in the Accession section below to create a Top Container.

To Link to a Location (Resources)

As of ArchivesSpace 1.5.x, adding location information is tied to the creation of a Top Container. If you want to link a component of a Resource record to a location, see the "Creating a Top Container (Adding a Container Instance)" or "To Add Container Instances to an Existing Top Container" sections below.

To Change a Location (Accessions or Resources):
1. Open the relevant record.
2. Click Edit.
3. Click on Instances on the left side.
4. If Instances are collapsed, click on Expand.
5. Click on Top Container (blue field) and click on View (this will open a new tab).
6. Click Edit in the upper left corner.
7. Click on the small "x" at the right side of the current location to remove it.
8. Search for the new location and click to select it.
9. Save the Accession or Resource record.

To Remove a Location (Accessions or Resources):
1. Open the relevant record.
2. Click Edit.
3. For Accessions, click on Instances on the left side. For Resources, navigate the component using the contents list/hierarchy at the top of the screen. Then click on Instances.
4. If Instances are collapsed, click on Expand.
5. Top Container (blue field) and click on View (this will open a new tab).
6. Click Edit in the upper left corner.
7. Click on the small "x" at the right side of the blue location field to delete the link to the existing location. **Please note:** ASpace will NOT confirm deletion of a location link. When you click on the "x," the link is gone. You will need to re-link it if you accidently removed the link.
8. Save the Accession or Resource record.

FINDING THE LOCATION OF A COLLECTION OR PART OF A COLLECTION

There are several ways to find the location of a collection. If you know what collection or part of a collection you are looking for, the fastest option is to use the Top Container module. Alternatively, if you have a record open or don't know what part of the record you want, you can find the location from within the record. Directions for both are below.

To View the Location Using the Top Container Module:
1. Click on the gear icon in the upper right of ASpace.
2. Select "Manage Top Containers."
3. In the appropriate box (accession or resource), type the collection identifier or part of the title.
4. Select the collection from the list.
5. Click on "Search."
6. The results should show you all containers associated with the collection (this can range from one to several hundred).
7. The location information is shown under "Current Location."
8. If the field is blank or the collection is not where it should be, ask for help!

To View a Location from the Accession or Resource Record:
1. Open the relevant record.
2. For Accessions, click on Instances on the left side. For Resources, navigate the component using the contents list/hierarchy at the top of the screen. Then click on Instances.
3. If Instances are collapsed, click on Expand.
4. Click on the blue Top Container box and a pop-up should appear
5. Click on View. This should open a new tab that will take you to the location record with the full details and will show you any other materials tied to that location.

ACCESSIONS

The Accessions module is designed to establish basic intellectual and physical control over a new accession at the time it is received in the repository. The accession record allows for recording information about the accession transaction, about the contents of the accession, and about several basic collection management events related to the accession. An accession record documents a single accession transaction, though it may include many items.

All transaction dates in ASpace must be entered as yyyy-mm-dd (i.e., 2010-01-25). Transaction dates are things like Accession Date, Date of Acquisition, or Deed of Gift Sent date. ASpace will prompt you if these dates are not properly formatted. Descriptive dates—those referring to dates of collections and materials—should be entered as year only or date expression (natural language).

CREATING A NEW RECORD

In order to create a new record, you will need a unique Accession Number. To find a unique number, select the Accession module. Using the facets on the left side, scroll to and click on the current year (i.e. 2016). If the records are not sorted by Accession Number, click on the column header labeled Identifier. Find the last number for the year.

This section of the manual will walk through the creation of an Accession record, one section at a time. It also includes when and how to make updates as processing of a collection begins and is completed. Most examples will come from Accession 2015-163, James F. Heizer & Phoebe Anne McCormick Heizer Correspondence, if you wish to view the record as a sample.

BASIC INFORMATION

1. To start a new record from the Accessions module, click Create and Accession.
2. The following fields are required for manuscript or record group accessions in Special Collections: Title, Identifier, Accession Date, Content Description, Acquisition Type, Resource Type, a Date, Extents, and some user defined fields.
3. Add a Title (i.e. James F. Heizer & Phoebe Anne McCormick Heizer Correspondence)
4. The Accession Number has four boxes. Enter "Acc" in the first box, the 4-digit part of the Accession number in the second box (i.e. 2015), and the 3-digit part of the number in the third box (i.e., 163).
5. The Accession Date should auto-populate with that day's date. If you have a reason to record the date as a day other than that day, click on the calendar button and select a different date.
6. As soon as you have filled in the Accession Number and Accession Date, **save your record**! You may continue to save throughout the creation of an Accession record.
7. Enter the description of the collection in the Content Description field. This description can be written by you or come from the donor or dealer. It should summarize the amount and types of material. This may be in a list, as elements separated by semi-colons, or in paragraph form. A dealer description may also be copied or typed into this field.
8. If there are particular issues with the condition of the material(s), you can add a note in the Condition Description field.
9. Use the Disposition field to note any part of the accession that will reside in a different location (i.e., 3 books for cataloging, or 1 box transferred to University Archives)
10. If the donor or dealer has supplied an inventory in electronic format, it can be copied and pasted into the Inventory field.

11. If there are notes about retention of materials, these can be added to the Retention Rule field.
12. If there are notes you wish to share with staff about the collection, they can be recorded in the General Note. This is also a place that may include information about future processing, VT Foundation barcode numbers, or the status of a collection.
13. Select the Acquisition Type from the drop-down menu.
    a. In most cases, this will be "Gift" or "Purchase."
    b. We occasionally receive materials from other entities, especially on campus, which may be considered a "Transfer."
    c. If you are creating retro accession records for older/discovered materials for which we do not have a paper accession file or a known origin, select "Unknown" (rather than leaving the option blank).
14. Select the Resource Type from the drop-down menu. Selecting an option from this drop-down box does NOT add it to the title of the collection. If the collection consists of receipts, for example, you may select "Papers," and call the collection the "John Smith Receipts."
15. If there are access or user restrictions on the accession, check the Restrictions Apply? box. If there are no restrictions, skip to Step 15.
16. Use the Access Restrictions?/Note and/or Use Restrictions?/Note to specify restrictions on the collection.

DATES

1. Select the Date Label. Usually, for manuscript and record group accessions, this will be Creation.
2. Descriptive dates may be entered four different ways:
   a. If the collection is a single date select Single from the Type. Enter the date in the Begin field (i.e. Begin=1865).
   b. If the collection is a date range, select Inclusive Dates from the Type. Enter the dates in the Begin and End fields (i.e. Begin=1861 and End=1868.) If you have specific months and/or days, those may be included (i.e. Begin=1861-06 and End=1868-09-15).
   c. If the collection is a date range, but a majority of the materials are from a date range within the larger range, select Inclusive Dates and complete Step b above. THEN, click on Add Date and select Bulk Dates. Put the Begin and End bulk dates in the fields.
   d. If the collection has circa dates, single dates that are non-contiguous, date ranges that are non-contiguous, or a combination of these, they may be entered in the Date Expression field (i.e., 1929, 1932, undated or c.1850 or 1861-1865, 1870-1871). You may also use this field for "n.d." for accessions that do not have a clear date.

EXTENTS

1. Select the Portion (in the majority of cases, this will always be Whole).
2. In the Number field, input the size of the accession (i.e. 0.5).
3. In the Type field, select the appropriate choice from the drop-down menu. Unless you are dealing with materials not in boxes or materials in specific media formats, this will usually be Cubic Feet. Use other Types as appropriate.
4. In the Container Summary, type the number of boxes, folders, rolls, etc. (i.e. 1 box or 3 boxes, 2 oversize folders, 3 rolled tubes).

AGENT LINKS

1. Whenever possible, link AT LEAST ONE Agent as Source and AT LEAST ONE Agent as Creator to an Accession record, if known. You may link more, as well as any Agents as Subjects.
2. Click on Add Agent Link.
3. Select the role (Creator, Source, or Subject).
4. For names that are Sources, please specify the Relator. If the Source is donor, select "Donor." If the Source is a dealer, select the closest role (i.e. Bookseller, Auctioneer, or Collector).
5. For names that are Creators or Subjects, a relator or term/subdivision is not required.
6. In the Agents box, filter for an existing name **OR** click on the arrow to Browse or Create Agent and follow the directions above to create a new Agent record.
7. You may use a name more than once in a record, i.e. if the name is both a Source and a Creator, but you will have to link it separately for each function.
8. For more on Agents, see the Agents section of the manual.

RELATED RESOURCES & ACCESSIONS
1. Once a related Resource record has been created, it will show in the Related Resources section. **Please note:** In general, an Accession record should only be linked to ONE Resource record (though ASpace will not restrict this). Some Resource records, however, will have multiple Accession records linked to them.
2. To link to a Resource, click on Add Related Resource.
3. Filter for the Resource and select it to add.
4. If an Accession is related to other Accessions, click on Add Related Accession. This is particularly useful for multiple accessions from the same source that need to be processed together or additions to an existing collection.
5. Filter for the Accession and select it to add.

SUBJECTS
1. Click on Add Subject.
2. In the Subjects box, filter for an existing Subject OR click on the arrow to Browse or Create Subject and follow the directions above to create a new Subject record.
3. For more on Subject, see the Subjects section of the manual.

EXTERNAL DOCUMENTS & RIGHTS STATEMENTS
There may be rare instances in which you want to link an Accession record to an external document (inventories, images, or other items). If you are linking to an external document, the document should reside either on a public website or on a shared server that Special Collections staff can access. To add a link to an external document, click Add External Document. Give it a title and provide a link/description of the location.

Although we are not currently creating Rights Statements for Special Collections materials, we may do so in the future. For now, you should not be adding Rights Statements to Accessions, Resources, or Digital Objects.

INSTANCES & DIGITAL OBJECTS
Once an accession is in the system, it should be housed in a temporary location. If you know the location while you are accessioning, you should add an instance at the time. If you do NOT know the location while you are accessioning, you should go back and add the instance when you have placed the materials on the shelf.

1. Click on Add Container Instance.

2. Select Accession as the Type. If you are placing multiple items (i.e. 3 boxes) on the same shelf, you can group them as Top Container. You may also treat them as separate Top Containers. If you are adding multiple items to different shelves, you should either treat materials on each shelf or location as a separate Top Container or treat each container as a separate Top Container.
3. Click on the arrow next to the right of the Top Container field and select Create.
4. Leave the Container Profile field empty. We are not yet using that feature.
5. Select the Container Type.
   a. For a single folder or oversize folder, select Folder.
   b. For a single box or range of boxes which will be on the same shelf, select Box.
6. In the Indicator field, put the box or folder number or range of numbers. For single folder collections or single box collections, this will always be "1." For a range of containers on the same shelf, use "#-#." If you are creating separate Top Containers for each box in an accession, use sequential numbers.
7. Click Add Location.
8. In the Location field, type the shelf location (without "/"s) and click to select.
9. Click Create and Link to Top Container.
10. Generally speaking, Accessions are identified at the Top Container level only. You do not need to add Child or Grandchild information.
11. Repeat Steps 1-9 for any additional shelves, locations, and/or Top Containers you wish to identify.

Some accessions may have associated digital objects, especially if the acquisition includes born-digital materials.

1. Click on Add Digital Object.
2. To add a link to an existing Digital Object record, filter in the record OR click on the arrow to Browse or Create and follow the directions below to create a new Digital Object record.
3. Repeat for any additional Digital Objects.

DEACCESSIONS
Occasionally, Special Collections deaccessions portions of or a complete collection that was donated by, purchased by, or deposited in the department. If you need to include information about a deaccessioning of materials related to an Accession, see the "Deaccessions" section below.

COLLECTION MANAGEMENT & CLASSIFICATIONS
Collection management information includes things like processing priorities, processing plans, total processing hours, and other statistics. While we had previously added a Processing Priority to collections in Archivists' Toolkit, we had not been using this feature recently. You may see some old records with this information imported, but in general, Special Collections does not currently track the majority of information in this section. You do not need to fill out the fields in this section.

Classifications can be used in a variety of ways. We have not set current uses for Special Collections and when we do, we will probably be using them mainly for Resources and Digital Objects. You do not need to fill out the fields in this section.

USER DEFINED FIELDS

1. If entire collection or selected materials have been digitized, check Digitized? [Boolean 1]. This will likely be filled in later, not at the time an accession record is being created.
2. If the digitized content has been added to Omeka, check Digitized content in Omeka? [Boolean 2]. This will likely be filled in later, not at the time an accession record is being created.
3. If you have identified materials for digitization, indicate the priority in Digitization Priority (0-3) [Integer 1]. 0 indicates there is nothing to digitize; 1 is low priority; 2 is medium priority; 3 is high priority.
4. Fill in the Date of Acquisition [Date 1] as yyyy-mm-dd (i.e., 2015-12-14). This is the date of an invoice or the date a deed of gift was signed by the donor.
5. If the collection was purchased, enter the Purchase Amount [Real 1] without a $. If the collection came with an appraisal, enter the Appraisal Amount [Real 2] without a $.
6. Enter your user name or initials (whichever is fine, as long as it identifies you) in the Accessioned by [String 1] field.
7. If the Accession is or might be an addition to an existing collection, fill in the Addition? [String 2] field to with a "Yes." If it is not an addition, fill in the field with a "No."
8. Include any Communications Notes [Text 1] with donors or dealers. You do not need to add entire emails, but a brief summary of communication activities may be useful. You should also use this field to indicate if a fund other than regular state money was used to acquire the accession or portions of the accession.
9. Include any notes about which materials you feel should be digitized (or indicate the entire collection) in Materials for Digitization [Text 2].

CREATING AN ACCESSION RECORD FOR A PUBLICATION/PUBLICATIONS

We use also use ASpace to track publication donations and purchases. In order to create a new record for a publication or group of publications, you will need a unique Accession Number. To find a unique number, select the Accession module. In the Filter by Text box, type "pub-yyyy" (the yyyy should be the current fiscal year). If the records are not sorted by Accession Number, click on the column header labeled Identifier. Find the last number for the current fiscal year.

BASIC INFORMATION
1. To start a new record from the Accessions module, click Create and Accession.
2. The following fields are required for publication accessions in Special Collections: Title, Identifier, Accession Date, Acquisition Type, Resource Type, Extents, and some user defined fields.
3. In the Title field, enter the title of the work, followed by a comma and the date (i.e. "Virginia Cookery Book, 1885"). If you have more than one publication, enter them all, separating each title with a ";".
4. The Accession Number has four boxes. Enter "Pub" in the first box, the 4-digit part of the Accession number in the second box (i.e. 2015), and the 3-digit part of the number in the third box (i.e., 163).
5. The Accession Date should auto-populate with that day's date. If you have a reason to record the date as a day other than that day, click on the calendar button and select a different date.
6. As soon as you have filled in the Accession Number and Accession Date, **save your record**! You may continue to save throughout the creation of an Accession record.
7. If the donor or dealer has supplied an inventory in electronic format, it can be copied and pasted into the Inventory field.

8. If there are notes about retention of materials, these can be added to the Retention Rule field.
9. If there are notes you wish to share with staff about the collection, they can be recorded in the General Note. This is also a place that may include information about future processing, VT Foundation barcode numbers, or the status of a collection.
10. Select the Acquisition Type from the drop-down menu.
11. Select "book(s)" from the Resource Type drop-down menu.

EXTENTS
1. Select the Portion.
2. In the Number field, input the number of volumes.
3. In the Type field, select "Volumes" from the drop-down menu.

AGENT LINKS
1. Whenever possible, link AT LEAST ONE Agent as Source. You do NOT need to link authors or other agents for publication accession records.
2. Click on Add Agent Link.
3. Select "Source" as the role.
4. For names that are Sources, please specify the Relator. If the Source is donor, select "Donor." If the Source is a dealer, select the closest role (i.e. Bookseller, Auctioneer, or Collector).
5. In the Agents box, filter for an existing name **OR** click on the arrow to Browse or Create Agent and follow the directions above to create a new Agent record.
6. For more on Agents, see the Agents section of the manual.

RELATED RESOURCES & ACCESSIONS
1. If the publication or publications were purchased along with manuscript materials, it is helpful to link the related Accessions for internal record keeping.
2. Click on Add Related Accession.
3. Filter for the Accession and select it to add.

SUBJECTS
1. Click on Add Subject.
2. In the Subjects box, filter for an existing Subject OR click on the arrow to Browse or Create Subject and follow the directions above to create a new Subject record.
3. For more on Subject, see the Subjects section of the manual.

USER DEFINED FIELDS
4. Fill in the Date of Acquisition [Date 1] as yyyy-mm-dd (i.e., 2015-12-14). This is the date of an invoice or the date a deed of gift was signed by the donor.
5. If the publication or publications were purchased, enter the Purchase Amount [Real 1] without a $. If the publication or publications came with an appraisal, enter the Appraisal Amount [Real 2] without a $.
6. Enter your user name or initials (whichever is fine, as long as it identifies you) in the Accessioned by [String 1] field.
7. In the Addition? [String 2] field, fill in a "No."
8. Include any Communications Notes [Text 1] with donors or dealers. You do not need to add entire emails, but a brief summary of communication activities may be useful. You should also use this field to indicate if a fund other than regular state money was used to acquire the accession or portions of the accession.

CREATING EVENT RECORDS FOR ACCESSIONS

Event records are used to record an action taken on an Accession, Resource, or Digital Object record. However, most actionable items Event records document, for our purposes, are connected to Accession records. As a result, this manual current only includes directions on how to create Event records in conjunction with Accessions.

Multiple Event records can be tied to a single Accession. They can be used for all accessions to track the date an acquisition was accessioned, processed, and cataloged, and when rights were transferred. Event records can indicate when a deed of gift was sent, signed, and received from a donor, and when an acknowledgement was sent. There are a number of other uses, as well, but these are the primary expected uses for Special Collections. The number of Event records required for an Accession will vary, depending on the method of acquisition, any rights issues, additional transfers, and more, but this section will walk through the general process, which can be repeated as needed. Not all Event records will be created at the time of Accession, but you can always go back and add them.

BASIC INFORMATION
1. Click on Create, then select Event.
2. Select the Type:
   a. If you are creating a new accession for a collection of materials going into the backlog, select Accession.
   b. If you are indicating some part of the process of sending/receiving a deed of gift and/or sending an acknowledgement note, select the appropriate: Agreement Sent, Agreement Signed, Agreement Received, Acknowledgment Sent.
   c. If you are indicating a transfer of some sort, select the appropriate: Copyright Transfer, Custody Transfer, Rights Transferred.
   d. If the manuscript collection/record group has been processed (or an addition has been processed), select Processed.
   e. If the manuscript collection/record group has been cataloged (or you have updated a catalog record) or if published materials (Pub. xxxx.xxx records) have been cataloged, select Cataloged.
   f. If materials are being digitized or otherwise reproduced, select Replication (you will be able to more specific below).
   g. If materials are being deaccessioned, select Deaccession.
   h. If you are indicating some other activity, select the appropriate option.

EVENT DATE/TIME
1. Leave Date/Time as Date Subrecord.
2. Select the appropriate Label based on what you are indicating:
   a. For new accessions, deed of gift/acknowledgement processes, transfers, right issues, or processing/cataloging statuses, select Record Keeping.
   b. For digitization, select Digitized.
   c. If you aren't sure, ask Kira!
3. Select the Type of date. In most cases, this will be a single date on which the activity was accomplished and should be entered as yyyy-mm-dd (i.e. 2015-03-19). If you are working with retroactive materials or do not have specific information, you can use the year/month as yyyy-mm or just the year as yyyy.
4. Select Era ("ce").
5. Select Calendar ("Gregorian").

AGENT LINKS
1. Select the Role.
   a. For activities like accessioning, processing, acknowledging/sending paperwork, documenting rights issues, updating processing/cataloging statuses, digitizing, and the like, select Implementer.
   b. For activities like receiving deeds/acknowledgements or receiving transfers, select Recipient.
   c. If you aren't sure, ask Kira!
2. Filter for your name (or the name of the person responsible for the actions taken) and select it.
3. If multiple Agents were involved in an activity, click Add Agent Link and repeat Steps 1-2 as needed.
4. Whenever possible, an Event record should have at least one Agent linked to it.

RECORD LINKS
1. Select the Role.
   a. If you are documenting an activity or process that results in a new record (Resource, Digital Object, or another Accession), select Outcome.
   b. If you are documenting an activity or process that was taken on an existing record (Resource, Digital Object, or another Accession), select Source.
2. You may link an Event to an Accession, Resource, or a component of a Resource. Filter for the Accession, Resource record, or component (item) to which you would like to link and select it.
3. If the same action was taken on related Accession, Resource, or components on the same date, you can link addition records by clicking on Add Record Link and repeating Steps 1-2 as needed. In other words, you may link to an Accession as a Source and a Resource as an Outcome when an accession is processed and results in a new Resource record.

ADDITIONS TO THE ART, MAP, OR PHOTOGRAPH COLLECTIONS, OR VERTICAL FILES
Some accessions are single items or small collections that are added to the Art Collection, Historical Photographs Collection, the Historical Map Collection, or Vertical Files. Create an Accession record as you would for any other collection.

1. Create an Event record to indicate the materials are Processed.
2. Under the Basic Information section of the Accession record, add a note in the General Note field explaining where the material has been integrated (i.e., in Art Storage room as of 7/9/2010 kad, or added to Historical Photograph Collection 7/9/2010 kad).

FILTERING & SEARCHING ACCESSION RECORDS
The Filter by Text and Search All Records features work the same way for all record types. For directions on filtering and searching, see the "Filtering & Searching Records" section below.

VIEWING & EDITING ACCESSION RECORDS
1. Once you locate a record, either by filtering, searching, or sorting, click on Edit to make changes.
2. If you do not wish to make changes and have not changed accidentally made changes, you can exit the record. If you have accidentally made any changes, ASpace will ask if you want to save. If you do not, click on Revert to ignore changes.

3. If you are changing or adding information to a record, be sure to click Save before you navigate away from the record.

RESOURCES

CREATING A NEW RESOURCE RECORD

There are two basic ways to create a new Resource Record. If there is already an Accession Record for the collection, skip to "[Creating a Resource Record from am Accession Record](#)" below. (This will use existing information to fill in certain fields and save some time. The section also explains which Accession Record fields map to which Resource Record fields.)

If there is NOT an Accession Record—if you are processing a less-documented collection from the backlog, for example—you will need to create a Resource Record from scratch. These directions will go through the various tabs and explain required and optional fields for creating the top-level description (usually collection-level). If a field is required, it is noted in the relevant step.

By default, the list of Resource records sorts by the date the record was created. You can reorder by using the "Sort by" feature in the right corner above the list of collections. If you are looking for the next available Ms number for a collection, enter "Ms-2016" (or the current year) in the Filter by Text box to bring up a list of the current year's collections.

You can begin a new Resource record by clicking on Create, then Resource near the upper left corner of the screen.

BASIC INFORMATION

1. Give the collection a title. Titles usually reflect the creator(s), but there are exceptions. A title is required.
    a. If the title contains the title of a published work or needs some other emphasis (italics, tagging a personal name, or inserting a hyperlink) you may use the "[Wrap in Tag](#)" feature or HTML to encode content.
2. Input the Identifier in its smallest units. You DO NOT need to add any punctuation. For example, a new Ms collection would be "Ms" in the first box, "2010" in the second, and "036" in the third. For a new RG collection, type "RG" in the first box, "31" in the second, "14" in the third, and "9" in the last. If an RG has more than 4 parts, you may need to combine units. You may place numbers and letters together (i.e. 9b) or place two numbers in a field with a period between them (i.e. 9.14). An Identifier is required.
3. Select the Level of Description. For top-level description, this will almost always be "collection." This field is required.
    a. **Please note:** Depending on your user preferences, you may automatically see "Collection" in this field when you create a NEW Resource (this is not the case when you create a Resource from an Accession). You can change this as needed.
4. Select the Resource Type. This is an overall term to indicate the contents of the collection and does NOT appear in the completed finding aid. It is not required.
5. Select the predominant language of the collection. If the collection contains materials from multiple languages, you will be able to note that later. A Language is required.
6. Do NOT check the Publish? box until the finding aid is complete!
7. If the collection has any access or use restrictions, check the Restrictions Apply? box. The actual restriction(s) will be detailed in the notes.
8. If there is an internal note to be shared, use the Repository Processing Note field.

DATES

1. Leave the date Label as Creation.
2. Descriptive dates may be entered four different ways:
   a. If the collection is a single date, select Single from the Type. Enter the date in the Begin field (i.e., Begin=1865)
   b. If the collection is a date range, select Inclusive Dates from the Type. Enter the dates in the Begin and End fields (i.e. Begin=1861 and End=1868.) If you have specific months and/or days, those may be included (i.e. Begin=1861-06 and End=1868-09-15).
   c. If the collection is a date range, but a majority of the materials are from a date range within the larger range, select Inclusive Dates and complete Step b above. THEN, click on Add Date and select Bulk Dates. Put the Begin and End bulk dates in the fields.
   d. If the collection has circa dates, single dates that are non-contiguous, date ranges that are non-contiguous, or a combination of these, they may be entered in the Date Expression field (i.e., 1929, 1932, undated or c.1850 or 1861-1865, 1870-1871). You may also use this field for "n.d." for accessions that do not have a clear date. However, Date Expression makes searching by date more difficult, so whenever possible, try to conform dates to a Begin and End period.

EXTENTS

1. Select the Portion (in the majority of cases, this will always be Whole).
2. In the Number field, input the size of the accession (i.e. 0.5)
3. In the Type field, select the appropriate choice from the drop-down menu. Unless you are dealing with materials not in boxes or materials in specific media formats, this will usually be Cubic Feet. Use other Types as appropriate.
4. In the Container Summary, type the number of boxes, folders, rolls, etc. (i.e. 1 box or 3 boxes, 2 oversize folders, 3 rolled tubes).

FINDING AID DATA

The finding aid data in a resource record contains information located in the <eadheader> and <frontmatter> of a finding aid. Since work on most records will not happen all at once, it is probably best to leave the Finding Aid Data tab until the resource record is complete and you are ready to export. Below are the Special Collections required fields for this tab.

1. EAD FA Unique Identifier: This is the Virginia Heritage tracking number.
2. Finding Aid Title: This should be written as "[collection title], <date>[enter date(s)]</date>".
3. Finding Aid Filing Title: This is the "sort" title. **Please note:** Many of the initial collections in the previous system were imported and these fields didn't import to the correct location due to the way the tags were labeled, so some collections will not be in the same format.
4. Finding Aid Date: This is the date the finding aid (aka the resource record) is exported and uploaded to the web. This field should read as follows: "2019 [or appropriate year] (CC0 1.0)"
5. Finding Aid Author: The name of the person(s) who created the finding aid/resource record.
6. Language of Description: English.
7. Finding Aid Status: The default is set to Completed. If a finding aid is a partial list/inventory or representations a finding aid in progress, the status may be changed to the most relevant option from the drop-down list.

8. The following fields may be left blank: Description Rules, Sponsor, Edition Statement, Series Statement, and Finding Aid Note.

REVISION STATEMENTS

If you are returning to a finding aid to make changes or updates, you should add a note about the revisions.

1. Click on Add Revision Statement.
2. In the Revision Date field, enter the date of revisions as yyyy-mm-dd.
3. In the Revision Description field, enter a short note to indicate what changes were made (i.e. "Series added" or "Series and subseries updated" or "New materials added").

RELATED ACCESSIONS

1. If there is an existing accession(s) related to the Resource, it/they should be linked. Click on Add Related Accession.
2. Filter for an accession and click on it to select.
3. Repeat for any additional accessions.

AGENT LINKS

Agents are not required by ASpace, but please try to link AT LEAST ONE creator and any relevant subjects.

1. Click on Add Agent Link.
2. Select the role (Creator or Subject). **DO NOT LINK NAMES AS SOURCES TO A RESOURCE RECORD**!
3. For names that are Creators or Subjects, a relator or term/subdivision is not required.
4. In the Agents box, filter for an existing name **OR** click on the arrow to Browse or Create Agent and follow the directions above to create a new Agent record.
5. You may use a name more than once in a record, i.e. if the name is both a Source and a Creator, but you will have to link it separately for each function.
6. Repeat Steps 1-5 for all additional creators and subjects.
7. For more on Agents, see the Agents section of the manual.

SUBJECTS

Subjects are not required by ASpace, but please try to link AT LEAST any relevant Local headings.

1. Click on Add Subject.
2. In the Subjects box, filter for an existing Subject OR click on the arrow to Browse or Create Subject and follow the directions above to create a new Subject record.
3. For more on Subject, see the Subjects section of the manual.

NOTES

ASpace allows the addition of 29 different notes available in EAD. Although none are technically required, 15 of these are notes Special Collections and University Archives uses in finding aids on a regular basis. Some of the note types will be different from our best practices, but the default name that is exported for the note will reflect the terms we currently use.

Below is general information to be aware of when adding notes. Description of the notes is broken into two lists: those required by Special Collections and University Archives (because they appear in most Virginia Heritage finding aids and are part of our best practices) and those used as needed.

For a complete list of the order in which notes should appear, see Appendix A: Note Order. A default note order, which reflects our current practices, has been set for the repository in ASpace. However, you may reorder notes at any time by dragging them.

General Information on Adding Notes

1. Choose a note from the drop-down list and a box will appear. Each note has a Note Type, a Label, and Content.
2. There is a Publish? box associated with each note. By default, when you publish a finding aid, notes will be published. If, after a finding aid is published, there is a note that should be suppressed, you can uncheck the Publish? box for the note and sub-note to make it private.
3. You may copy and paste text from another source or create the note directly in the Content field.
4. Hitting the Enter key **TWICE** will differentiate between paragraphs in any note—when the notes are exported, they will appear in separate paragraph tags (<p> </p>).
5. To create an external link, to tag a name, subject, date or title, or to add emphasis, see directions on how to use "Wrap in tag" below.
6. Notes are automatically added. When you finish a note, you can select Add Note to add another. To delete a duplicate or unnecessary note, click the "X" in the corner of the note. ASpace will confirm before deleting the note.
7. **Please note:** Depending on your user preferences, you may automatically see some note fields populated with text when you create a NEW Resource (this is not the case when you "spawn" a Resource from an Accession). You should replace text in brackets with the appropriate information. Otherwise, fill in the note Content field as directed below. If you would like to check/change your user preferences to make this the case, see the "User Settings & Preferences" section.

Special Collections Required Notes

Notes contain both a Type and a Label. DACS (Describing Archives: A Content Standard) references have been added to the information about a note, if there is a related rule. This information does NOT need to be added to the Resource Record. In the two sections that follow, the notes will be listed as TYPE (LABEL). You should select the Type, then fill in the Label.

1. Abstract (Abstract)
    a. Should be a short description of the collection (no more than a paragraph) and can include information from both Scope and Content and Biographical Note/Administrative History.
    b. No DACS rule, but mentioned in a comment of DACS 3.1 on Scope and Content notes
2. Language of Materials (Language of Materials)
    a. As of ASpace 2.7.x, this has been moved to a separate location between the "basic information" and "dates" information for a finding aid.
    b. Select the primary language of the collection. (Remove the language field if there is no language content, but add a note as per d. i. below.
    c. Click on "Add Language" if the collection has more than one language represented.

    d. Click on "Add Language Note" to create a text note about the language(s) or lack of language/script in the collection.
        i. This should be a note explaining which language(s) or script(s) appear in the collection of the contents [or] a note indicating there is no language or script-based materials.
    e. DACS 4.5

3. Conditions Governing Access (Conditions Governing Access)
    a. By default, the text should read, "The collection is open for research." Change this text to a more appropriate explanation if there are restrictions on access.
    b. See Ms.2019.023 for an example.
    c. If the collection has restrictions on access, select the types(s)/reason(s) and write a note explaining restrictions on access (donor, copyright, time, legal, records management, or otherwise) and/or a note explaining a collection is unprocessed or partially processed (which may impede easy access), if this is the case.
    d. If there are restrictions, please end the note with the following sentence: "Contact Special Collections and University Archives for additional information."
    e. DACS 4.1

4. Conditions Governing Use (Conditions Governing Reproduction and Use)
    a. Since we do not necessarily know the copyright status of each collection in SCUA, We have developed a standard, interim note for collections. Patrons requesting more information will trigger an investigation a review of the collection and we will either update the note to either reflect restrictions or indicate open use of the collection.
        i. Suggested interim note:
        ii. The copyright status of this collection is unknown. Copyright restrictions may apply. Contact Special Collections and University Archives for assistance in determining the use of these materials. Reproduction or digitization of materials for personal or research use can be requested using our reproduction/digitization form: http://bit.ly/scuareproduction. Reproduction or digitization of materials for publication or exhibit use can be requested using our publication/exhibition form: http://bit.ly/scuapublication. Please contact Special Collections and University Archives (specref@vt.edu or 540-231-6308) if you need assistance with forms or to submit a completed form.
    b. If we already know the status, the note should indicate copyright, use, or reproduction restrictions or lack thereof.
        i. example TBD
    c. DACS 4.4

5. Preferred Citation (Preferred Citation)
    a. By default, the text should read, "Researchers wishing to cite this collection should include the following information: [Enter collection title, Ms####-### or RG#/#], Special Collections and University Archives, Virginia Tech, Blacksburg, Va."
    b. Add the title and appropriate number.
    c. No DACS rule

6. Immediate Source of Acquisition (Source of Acquisition)
    a. There is no default text for this section. In general, it should be a statement along the lines of "The [collection] was donated to Special Collections and University Archives in May 2016." or "The [collection] was purchased by Special Collections and University Archives in July 2019." or "The [collection] was transferred to Special Collections and University Archives in 2019."

      b.   If you are adding new materials, you should add a sentence about the acquisition of the accession(s) being incorporated.

      c.   If the acquisition history of the collection or materials are unknown, use "The [collection] was received by Special Collections and University Archives prior to 1985."

      d.   DACS 5.2

7.   Processing Information (Processing Information)

      a.   By default, the text should read," The processing, arrangement, and description of the [Enter collection title] commenced in [month year] and completed in [month year]."

      b.   If working with an older collection, this information may not be available. Alter the text as needed.

      c.   If you are adding new materials, you should add a sentence about the accession(s) being incorporated.

      d.   No DACS rule

8.   Biographical/Historical

      a.   Fill in the Label as Biographical Note, Administrative History, or Biographical Note/Administrative History, depending on the nature of the note.

      b.   This note should include information about the collection's creators and/or subjects, as relevant.

      c.   Field is repeatable if you have multiple persons, corporate bodies, or families you would like to represent in separate notes. See Ms.2019.014 as an example.

      d.   DACS 2.7

9.   Scope and Content (Scope and Content)

      a.   This note should include information about the materials it the collection (what it is, what series there are, examples of items, etc.).

      b.   If you are processing a particular large and/or complex collection, it may make more sense to write a general Scope and Content note at the collection level and additional Scope and Content notes at the series or subseries level and/or have an Arrangement note to explain the organization of the collection.

      c.   DACS 3.1

10. Arrangement (Arrangement)

      a.   This note should include information about the series, including subseries, and the contents of series and subseries. It should also include information about the organization of series and subseries.

      b.   If you are processing a 1-folder collection with a single item, this note is NOT required.

      c.   DACS 3.2

11. General (Rights Statement for Archival Description)

      a.   This note should include a blanket rights statement for the finding aid (NOT the collection content).

      b.   The guide to the [collection name] by Special Collections and University Archives, Virginia Tech, is licensed under a CC0 (https://creativecommons.org/share-your-work/public-domain/cc0/).

      c.   DACS 8.2

12. After adding all required notes, click Apply Standard Note Order.

13. Save the record.

14. If you have additional notes to add, add those in the sequence noted below.

Additional Notes Used as Needed

Notes contain both a Type and a Label. In the two sections that follow, the notes will be listed as TYPE (LABEL). You should select the Type, then fill in the Label. Information as to where individual notes belong in the larger order is provided at the end of each item in bold. **Please note: The order of the notes is indicated in bold, however, you do not need to drop and drag them in this order manually. After adding notes, click the "Apply Standard Note Order" and ASpace will do this for you.**

1. Physical Location (Physical Access)
   a. If a collection or part of a collection is located someplace other than Special Collections (i.e. in off-site storage), this note may be used to indicate additional locations. This note should also be used to indicate limitations to physical access due to temporary removal from a collection (for conservation purposes) or limitations on access due to preservation concerns (directing people, for example. to a digital version first).
   b. See Ms.2019.040 for an example.
   c. **Goes BEFORE Abstract.**
   d. **DACS 4.2**
2. Existence and Location of Copies (Existence and Location of Copies)
   a. May be used to add links to scanned images, transcripts, digital objects on a library platform, or alternative formats held by the University Libraries (print, microform).
   b. Generally used to indicate copies created by or holdings retained by SCUA or the University Libraries, but it can be used more broadly at the discretion of the processor.
   c. See Ms.1940.033 for an example.
   d. **Goes AFTER Acquisition Information**.
   e. DACS 6.2
3. Accruals (Accruals)
   a. May be used to list expected future materials.
   b. **Goes AFTER Acquisition Information or Existence and Location of Copies, if the collection has both**.
   c. DACS 5.4
4. Appraisal (Appraisal)
   a. Used to note information about the destruction or removal for destruction of materials from a collection by the donor or previous owner (if known) and by the processor(s). Should indicate the reasons for removal (duplicates, legal obligation, etc.)
   b. Notes about gaps in the record due to reasons other than appraisal or destruction (materials not supplied with donation or purchase) should be noted in the Scope and Content field.
   c. **Goes after Acquisition Information or any previous optional notes used.**
   d. DACS 5.3
5. Bibliography (Bibliography)
   a. Can be used to create a collection level bibliography. More often, this is used at the component level to describe publications in a folder or folders.
   b. **Goes AFTER Scope and Content or Arrangement or any previous optional notes used**.
   c. No DACS rule.
6. Existence and Location of Originals (Existence and Location of Originals)
   a. May be used to indicate the location of original materials housed elsewhere if the collection contains or consists entirely of copies.

b. See Ms.2010.011 for an example.
c. **Goes AFTER Scope and Content or Arrangement or any previous optional notes used**
d. DACS 6.1

7. Other Finding Aids (Other Finding Aids)
    a. May be used to indicate:
        i. Other finding aids/inventories/lists available through SCUA and/or
        ii. Other finding aids/inventories/lists available through other cultural heritage institutions, if there are overlapping holdings.
    b. **Goes AFTER Scope and Content or Arrangement or any previous optional notes used**
    c. DACS 4.6

8. Related Archival Materials (Related Archival Materials)
    a. Can be used to indicate related archival collections at SCUA or other cultural heritage institutions.
    b. Repeatable, so multiple descriptions can be in a single note OR multiple notes can be created to indicate multiple holdings, at the discretion of the processor(s).
    c. See Ms.2009.037 for an example.
    d. **Goes AFTER Scope and Content or Arrangement or any previous optional note used**.
    e. **DACS 6**.3

9. Separated Materials (Separated Materials)
    a. May be used to indicate materials removed from the manuscript portion of the collection.
    b. See Ms.2009.031 for an example.
    c. **Goes AFTER Scope and Content or Arrangement or any previous optional notes used**.
    d. No DACS rule.

10. Physical Characteristics and Technical Requirements (Technical Access)
    a. Should be used to indicate specific technical needs required to access/view/listen to materials. Note should clearly explain the restriction or issue and whether or not SCUA can provide a solution.
    b. Example: This collection consists of cassette tapes that have not been digitized. Researchers may listen to cassettes by visiting the Special Collections and University Archives reading room. You may also contact us for more information about how to request digitization and/or online access to materials.
    c. DACS 4.3

11. After adding all optional notes, click Apply Standard Note Order.
12. Save the record.

DEACCESSIONS

Occasionally, Special Collections deaccessions portions of or a complete collection that was previously acquired by the department. If you need to include information about deaccessioning of materials related to a Resource, see the [Deaccessions](#) section below.

CLASSIFICATIONS

Any new record you create should include one (or more) Classifications. We will use these to group like materials together via the public interface and have created them based on the format of materials.

1. Click on Add Classification.
2. You can type words from the Classification, if you know it and select to add OR you can click on the arrow to the right of the search box and select Browse.
3. If you browse, click box next to the appropriate Classification(s).
4. Click on Link to Classifications.
5. ASpace will return you to the Resource record.

A NOTE ABOUT CREATING SIMPLE LISTS

Although it isn't clearly stated, you can create a simple list in any note field of ASpace. However, it needs to be done one of two specific ways, depending on how you would like the list to appear. Individual items in a list may also be highlighted individually (bold, italic, etc.) by using "Wrap in Tag" or hard coded using <emph> and <title> tags.

For a simple list with a bold head/title, format the simple list as the example below:

[note text]

<list><head>List title here</head>
<item>Item #1</item>
<item>Item #2</item>
…
</list>

For a list simple list with a head/title/introductory sentence that appears in normal font, see the example below.

[note text]

<list>
<item>Item #1</item>
<item>Item #2</item>
…
</list>

CREATING A RESOURCE RECORD FROM AN ACCESSION RECORD

If there is already an existing Accession record for a collection, this a great time-saving feature of ASpace.

1. Find and open the Accession record.
2. Since ASpace will overwrite an existing record, **BE SURE TO CHECK THAT THERE IS NO EXISTING RECORD WITH THE RESOURCE ID YOU PLAN TO USE**. For example, if you plan to use Ms.2010.109, filter in the Resource module to double check there is not already a collection numbered Ms.2010.109.
3. Click on the Spawn button.
4. Select Resource.
5. Before you can save the new Resource record, **ALL REQUIRED FIELDS MUST BE FILLED OUT** (Title, Identifier, Level of Description, Language, Date info, and Extent info).
6. Spawning should also automatically create a link in the Accession record when the new Resource record is saved.

7. You may save and close the Resource record as it is, then go to the Resource module and re-open it to make changes, or you may continue to work on the new Resource record from the Accession module.

DIRECTLY MAPPED FIELDS

Creating a Resource record from an Accession record will directly map information from the Accession record field to the Resource record field of the same name (i.e. the Title of the Accession becomes the Title of the Resource). Alter the fields in the Resource record as need (i.e. if a collection extent changes once it is processed) and add additional fields/notes as you process. This will not change information in the corresponding Accession record.

The following fields map directly:

1. Title
2. Date information (in any format)
3. Extent information (in any format, including Container Summary)
4. Container Summary
5. Restrictions Apply (checkbox)

INDIRECTLY MAPPED FIELDS

Other field will map indirectly to a related field in the Resource record. The list below includes information on how these notes may need to be altered or deleted before they are exported for researcher use. Alter the fields in the Resource record as need (i.e. if a collection extent changes once it is processed). This will not change information in the corresponding Accession record.

The following fields map indirectly (these are listed as [Accession record field] becomes [Resource record field]:

1. Description becomes Scope and Contents. This will need to be cleaned up and expanded to represent the collection.
2. Condition Description becomes General Physical Description. This note does not need to be included in the completed Resource record and should be deleted.
3. Access Restrictions becomes Conditions Governing Access (Access Restrictions).
4. Use Restrictions becomes Conditions Governing Use (Use Restrictions).
5. Agents and Subjects linked to the Accession will transfer to the new Resource record.
   a. **PLEASE** remove any name linked as source from the new Resource record.

From here, you can continue to add information to all sections of the record, as you would for any other Resource record. Go to "Creating a New Resource Record" and skip to any relevant sub-sections.

RESOURCE COMPONENTS

Resource records, in addition to the information located in all the tabs, also contain Components (<c01>, <c02>, etc). ASpace will support up many levels of nested components. However, Virginia Heritage currently only supports FOUR LEVELS of components (<c04>). If you have a collection that requires more than four levels, talk to Kira. We can create a Resource record to the detail needed, but we will have to do some manual work on it before it can be added to VH.

Components are displayed at the top of the screen, above the Resource record, and reflect the hierarchy of materials in the collection.

From the top-level record (collection description), you can only add a "child." A child is a component within the level above (i.e. an item or group of items is a child of a folder, a subseries is a child of a series, a series is a child of a collection). From any level other than the collection level, you may also add a "sibling" to a component. A sibling is a component at the same level (i.e. one series is a sibling to another series, one box-folder listing is the sibling of another box-folder listing, one subseries is the sibling of another subseries within their parent series, etc.).

If you are working with relatively few components, you can add children and siblings one at a time ("Creating a Component" below). If you have lots of components of at the same or different levels, you will want to use "Rapid Data Entry." Rapid Data Entry will speed up adding all the components at a single level—you can add all your series, then go back through each series and add subseries, then all the files, etc. Or you can start at the top of a series and add component-by-component down through the levels. Find a method that works for you.

CREATING A COMPONENT
Adding a Child or Sibling
1. From the top-level/collection level description, click Add Child. At the top of the screen, above the record, you should now see a bullet indented underneath the collection title (you can drag down the bar splitting the screen to see more of the contents list). Creating and describing components is similar to describing top-level records—you will see the same Basic Information, Dates, Extents, Agent & Subject Links, Notes, and Instances.
2. Select the level of this component.
   a. If you are creating an itemized list of a single folder, this would be "item."
   b. If you are describing a single letter or single folder collection, this would be the "file."
   c. If you are creating a series, subseries, or subgroup, etc., select the appropriate level from the list.
   d. If you are adding a level that is not listed (which should not happen too often), you may select "otherlevel." The line below it will now be available to define the "otherlevel." For example, if you are creating a list of boxes without inventoried folders, you could select "otherlevel" and set the level as "box."
3. Enter the Title of the component (the series, subseries, box, folder, item, etc.).
4. Component Unique Identifier is NOT required, and in most cases, not necessary. If you are describing subgroups within a record group, however, you may want to use this field. Look the Resource record for RG.2 as an example.
5. You do NOT need to fill in the Language, since this will duplicate information at the top level of the collection.
6. **DO NOT** apply restrictions at the component level. If a series, item, etc., is restricted, please note it at the **collection** level.
7. You should NOT use the Repository Processing Note field at the component level.

8. Input the Dates for the component.
9. You do NOT need to include Extent information at the component level.
10. If you wish to link additional Agents or Subjects at the component level, but it is NOT required. In theory, you have already linked this information to the collection level. DO NOT duplicate names at component levels that are already linked to the collection level—otherwise they will appear twice in the exported finding aid.
11. If you need to add a component level note—a series level scope note, for example—you may add a note in the Notes section, just as you did at the collection level. Notes are NOT required at the component level.
12. Add an Instance.
13. If you need to add another, lower level of description to this component (a folder to a series or an item to a folder, for example), click Add Child and repeat 2-12.
14. If you need to add a parallel level (another series or another folder, for example), click Add Sibling and repeat 2-12.
15. When you need to add a child, be sure the "parent" is highlighted in the collection hierarchy at the top. When you need to add a sibling, be sure you have the correct level selected in the collection hierarchy at the top (i.e., if you want add a parallel subseries within a series, be sure the **subseries** is highlighted). However, it is easy to reorder components. See "Editing/Moving Components."

To Add an Instance

It is necessary to add an instance wherever you wish to input container information such as box and folder numbers or create a link to a Digital Object record. Use the following instructions to add one or more instances to a Resource or Resource component record. **Please note:** the list of instance types is NOT fixed or authoritative. If the type of instance you wish to add is not in the list, we can consider adding it. Talk to Kira, since we need to use the login of someone with administrative access.

Creating a Top Container (Adding a Container Instance)
1. Select the component to which you want to add the instances from the collection hierarchy at the top.
2. Click on Add Container Instance.
3. Select the Type of instance from the drop-down list. For example:
   a. If you are adding an instance to a single folder collection, select Folder.
   b. If you are adding one folder from a box of multiple folders, select box-folder.
   c. If you are adding a box, select Box.
   d. If you are adding an oversize folder (that will be housed in a map case) or another oversize container, select Oversize.
   e. If you are adding an artifact or work of art, select Artifacts.
   f. If you are adding instances for IAWA materials that are housed in oversized folders in map case drawers, select Oversize (these are treated as oversize folders).
4. The Top Container feature creates a high-level container for parent containers in the collection that hold additional items (i.e. a box that includes many folders).
   a. If you are creating the first/only component for a collection/item or are starting a new top container (a second, third, etc. box), click on the arrow to the right of the Top Container field and select Create.
   b. Leave the Container Profile field empty. We are not yet using that feature.
   c. Select the appropriate Container Type.
      i. If you are creating a box that will include folders, choose Box .

ii. If you are creating a single folder collection, choose Folder.
iii. If you are creating an oversize folder for a collection, choose Folder.
d. In the Indicator field, put the box or folder number. For single folder collections, this will always be "1." For boxes or oversize folders, they should be numbered sequentially.
e. Leave the Barcode and ILS Holding ID fields blank.
f. If you already know where the box will be on the shelf, click Add Location, search, and select the location.
g. If you do not know where the box will be on the shelves, this information can be added later.
h. Click Create and Link to Top Container (which will return to the Resource record).
5. If your instance has a child component (folder or item in a box), select the appropriate Child Type. Usually, this will be Folder.
6. In the Child Indicator field, enter the folder or item number.
7. If your instance has a grandchild component (an item in a folder in a box), select the appropriate Grandchild Type (likely Item). This isn't common among our collections, but some collections may have this level of detail.
8. In the Grandchild Indicator, enter the item number or some sort of identifier.
9. Click Save Archival Object.
10. If you need to add an additional Instance or Instances that **relate to the same Top Container**, begin at step 3 of the next section below ("To Add Container Instances to an Existing Top Container"). If you need to add an additional Instance or Instances **that relate to a different Top Container** (in an oversize folder or a new box, for example), click on Add Container Instance and repeat steps 3-9 to create new Top Containers.

To Add Container Instances to an Existing Top Container

Once you have at least one Top Container for Instances in a Resource record, you can add additional Instances to any components in the content list/hierarchy of the collection that belong in the same Top Container. In other words, once you have created a Box 1 Top Container, you can add Instances to other components in the contents list.
1. At the top of the Resource Record, click on the component to which you want to add an Instance.
2. Click on Instances on the left-side guide.
3. Click on Add Container Instance.
4. Select the Type of instance from the drop-down list. For example:
   a. If you are adding an instance to a single folder collection, select Folder.
   b. If you are adding one folder from a box of multiple folders, select box-folder.
   c. If you are adding a box, select Box.
   d. If you are adding an oversize folder (that will be housed in a map case) or another oversize container, select Oversize.
   e. If you are adding an artifact or work of art, select Artifacts.
   f. If you are adding instances for IAWA materials that are housed in oversized folders in map case drawers, select Oversize (these are treated as oversize folders).
5. In the Top Container field, begin typing the name of the instances which you want to add children. In other words, if you are adding to Box 6, type "box" and a list of box top containers for the collection will be listed. Click on Box 6 to select it.
6. Select the Child Type. In most cases, this will be Folder.
7. In the Child Indicator field, enter the folder or item number.

8. If your instance has a grandchild component (an item in a folder in a box), select the appropriate Grandchild Type (likely Item). This isn't common among our collections, but some collections may have this level of detail.
9. In the Grandchild Indicator, enter the item number or some sort of identifier.
10. Click Save Archival Object.
11. You can repeat steps 1-10 to add Instances for existing Top Containers to any components.

To Add a Link to a Digital Object (Digital Instance)
1. Select the component to which you want to add the instances from the collection hierarchy at the top.
1. Click on Add Digital Object. If you are linking to an existing Digital Object record, filter for the Digital Object record and select it.
2. If you want to create a digital object record on the fly and link to it, click on the arrow to the right of the search box and select Create. See "Creating a Digital Object Record from a Resource Record" for how to complete this process.

RAPID DATA ENTRY
Rapid Data Entry is useful when you need to create a lengthy list of instances as the same or multiple levels. If you are creating component records for a collection that is all at the same level (i.e. a list of Box-folder titles and/or dates, for example), you can select/customize a single configuration.

If you are creating component records for a collection that contains mixed levels (series, subseries, folders, items, or any combination thereof), you will have to find a system that works best for you. You could use Rapid Data Entry to create all series-level components, then subseries in a series, folders in a subseries, etc., before starting the next subseries, working across parallel levels. Another option would be to start at the top of a series and work downward through the hierarchy of each series, one at a time.

Please note: The "Wrap in Tag" feature is not available during Rapid Data Entry. You may either hard code any of the options along the way, or go back after Rapid Data Entry is complete and use "Wrap in Tag" to markup text on each component later.

Using Rapid Data Entry
1. You can use the default configuration, select a configuration from the drop-down list (basic configurations will be forthcoming), or follow the "Configure Rapid Data Entry Screens" directions below to customize your own. (You will not need to fill in all fields if you choose to use an existing configuration or build your own.)
2. If you are using the default configuration, but don't need all 34 fields (you most likely won't!), you can click on Columns: # visible and uncheck boxes for fields you don't need during this session. You can save this new configuration as a template by clicking on the Save as RDE Template.
3. If you are entering large number of records which repeat the same information (for example, a list of Box-folder instances), you can make a field "stick" by clicking on the field name at the top of screen. The field will turn blue with black text. Any data entered in this field will appear in that field in the next row or rows.
4. Select the Level of Description (required).
5. Enter the Title. A title is required. If you are entering a list of folders whose titles are dates, enter the dates in the Title field, NOT in the Date/Dates/Date Expression.

6. If you have a known Date/Dates/Date Expression(s) for the component, include them.
7. Fill in any other fields based on the configuration you have chosen and the information you have available as you would for a single instance. Click on Add Row to add another component. If you wish to add multiple rows, click on the arrow to the right of Add Row and specify the number of rows to add. If you have "sticky" columns, the "sticky" information will appear in each new row.
8. If you click Save Rows, you will return to the Resource record. If you need to add more items at the same level at a later point or accidently exited Rapid Data Entry, select the parent level, then select the configuration again. As you add records, they should continue to appear below previous records.
9. To un-stick a field, click on the field label. It should return to black text on white.
10. Using RDE, you can also auto-fill columns with static information or generate sequential numbering down a column. Directions are included on the RDE screen.
11. When you are finished entering information, click Validate Rows to check for errors (missing required fields).
12. If you have no errors or after you have fixed any errors, click Save Rows to return to the main Resource record.

CONFIGURING RAPID DATA ENTRY SCREENS

Configuring Rapid Data Entry (RDE) allows you to create and edit customized templates that use only the fields you want and need for a list of components, rather than having to tab through extraneous fields. There are several existing templates, built on those we used with Archivists' Toolkit, but you can create your own, too.
1. Go to the Rapid Data Entry screen from within a Resource record.
2. Using the Columns: 34 visible drop-down menu, uncheck the fields you do not want to use.
3. Click on Save as Template.
4. Give the template a name. You can call the template whatever you would like (i.e. Kira's Template), but if you think it will be useful to others, try to name it something that identifies the key fields being used or otherwise describes the nature of the template.
5. Click on Save Template.
6. Your template should now appear in the Apply an RDE Template drop-down box.

EDITING/MOVING/DELETING RESOURCE COMPONENTS

Editing a Component

To edit a component, select it from the hierarchy at the top of the screen (you may have to expand some levels to find an individual component). Make any changes. Click Save before closing the record.

Moving a Component

To move a component, either within its current level, or to a new level, click on the Reorder Mode. This will allow you to move components up, down, into, or out of existing structures. Click Save before closing the record.

Deleting a Component

To delete a component, click on it to select. It should now appear highlighted in blue. This should open the component record below the component list/hierarchy. Click Delete. Confirm Deletion.

USING "WRAP IN TAG"

The "Wrap in Tag" feature serves a number purposes, including hyper-linking text, italicizing titles, creating bold or other emphases for text, and tagging names, subjects, and dates to populate indexes and subject heading lists in a finding aid. The "Wrap in Tag" option is available for most note fields in a Resource record. If the "Wrap in Tag" option is not present, you can *usually* code emphasis, links, and tags manually.

Please note: "Wrap in Tag" is not available during Rapid Data Entry. You may either hard code any of the options along the way or go back after Rapid Data Entry is complete and use "Wrap in Tag" to mark up text on each component.

HYPERLINKS

There are two different options for creating hyperlinks: <ref> (reference) and <extref> (extended reference).

<ref> is meant for internal links (links within the finding aid). Virginia Heritage does not currently support this feature, but it may work for locally hosted finding aids and descriptive records. Directions on how to use this are forthcoming as we figure out what the ASpace finding aid outputs look like.

Please note: We can either get external linking to work for the ASpace public interface OR the PDF exports at this time. We have prioritized the public interface and instructions below will make any links you code in a record work there. (We will continue to work on the PDF export problem.)

Linking to an external website or other finding aid (as a source in a Biographical note, or finding aid for a related collection, for example)
1. Surround the text you would like to be hyperlinked with <a>[text]
2. Insert href="[link]" in the <a> tag.."
3. Insert show and actuate properties.
4. The finished opening tag should look like:
a. <a href="[linkl]" show="new" actuate="onrequest">
5. Save the record.

EMPHASIS/TITLES

Some collections contain text in notes that should be bolded or otherwise emphasized to draw the researcher's attention <emph>. Options include bold, italic, underline, super (superscript), sub (subscript), bolditalic, etc. You **DO NOT** need to use <emph> for quotation marks or single quotes—these can simply be typed.

Emphasizing text
1. Highlight the text you want to emphasize.
2. A pop-up box will appear that says "Wrap with."
3. Select <emph>.
4. Place your cursor after the "h" and hit the space bar. This should populate the text "render."
5. After "render," add "=[formatting desired]".
   a. In other words, the completed tag should look like <emph render="bold"> or <emph render="sub">.
   b. Formatting options that should display in the public interface or the PDF include:

           i.   Bold
          ii.   bolditalic
        iii.   italic
        iv.   underline
          v.   super
        vi.   sub
       vii.   smcaps

6. Save the record.

Italicizing a publication title

1. Highlight the text you want to emphasize.
2. A pop-up box will appear that says "Wrap with."
3. Select <title>.
4. Place your cursor after the "e" and hit the space bar. This should populate the text "render."
5. After "render," add "=italic". The opening tag should look like <title render="italic">. After the title, the closing tag should look like </title>. Ex: <title render="italic">Oh! The Places You'll Go!</title>
6. Save the record.

AGENTS/SUBJECTS/DATES

      Agents and subjects other than those linked in the Agents or Subjects sections of a record may be tagged to appear in a <controlaccess> list (see "Index Terms": http://ead.lib.virginia.edu/vivaead/published/vt/viblbv00497.xml.frame for an example). **You DO NOT need to tag every name or subject in a collection** (or even any at all). **Please note:** Agents and Subjects linked in the Agents or Subjects sections of a record are already considered tagged. You do not have to tag these names elsewhere.

      However, tagging names (Agents) and subjects can be useful in collections with large amounts of correspondence from a specific source or subjects significant to a single collection, but perhaps not relevant to the rest of Special Collections' holdings (i.e. in cases where you do not want to add a new record to the Agent or Subject module).

Tagging Names

1. Highlight the name (Agent).
2. A pop-up box will appear that says "Wrap with."
3. Select the type of name: persname, famname, or corpname. If the type of name is uncertain, use the generic "name."
4. Place your cursor after the "e" and hit the space bar. This should give you three options: role, rules, source.
5. Assigning a Role, Rules, or Source is optional, but helpful. For example, if you found a name in the LCSH, you should indicate "lcsh" as the source. If you created the name based on DACS, you should indicate "dacs" as the rules. You may also assign roles (i.e. creator, photographer, compiler, etc.). Look at existing names for examples.
6. Repeat as needed for additional names in all notes.
7. Save the record.

Tagging Subjects

1. Highlight the subject.
2. A pop-up box will appear that says "Wrap with."

3. Select the type of subject: function, genreform, geogname, occupation, or subject. Use the generic "subject" topical terms if you are unsure.
4. If you use the generic "subject," proceed to Step 6. If you used a specific term, continue to Step 5.
5. Place your cursor after the last letter in the tag and hit the space bar.
   a. Assigning the rules or source is optional, but labeling one or the other is helpful. For example, if the heading is from the Art and Architecture Thesaurus, the source is "aat." If the heading was created based on DACS or AACR2, the rules would be "dacs" or "aacr2."
6. Repeat as needed for additional subjects in all notes.
7. Save the record.

Tagging Dates (in the rare case you may wish to generate an Index Terms list of significant dates from a chronology or biography)
1. Highlight the date. It can be in any format (yyyy/mm/dd; dd/mm/yyyy; m dd, yyyy; dd/mm/yy, text form, etc.)—the date will be normalized in Step 4.
2. A pop-up box will appear that says "Wrap with."
3. Select "date."
4. Place your cursor after the "e" in the tag and hit the space bar.
5. Set the calendar to "gregorian."
6. Set the era to "ce."
7. REGARDLESS OF ORIGINAL FORMAT, in the normal field, set the date as yyyy/mm/dd. For example, if the date is September 30, 2008, the normal field should be 2008/9/30. If the original date is only a year, i.e., 2008, the normal field should be yyyy.
8. The type is optional, but may be used to indicate a specific event (birth, death, marriage, etc.).
9. Repeat as needed for additional subjects in all notes.
10. Save the record.

CREATING RESOURCE RECORDS FOR ART OBJECTS OR HISTORICAL MAPS

If an art object(s) or map(s) are part of an existing collection, the item(s), along with the location, should be part of the Resource record and component list for the collection. Items in the component list can then be tied to oversize drawers or Art Storage Room shelves.

For artworks, art objects, or maps that are a donation or purchase in their entirety, a Resource record should be created to store basic information, including the location, and to make materials discoverable to researchers through the public interface. Resource records for artworks, art objects, or maps are not as extensive as Resource records for collections and record groups.

If artworks, art objects, or maps have been accession, the Accession Record may be used to create a Resource Record—see "Creating a Resource Record from an Accession Record," then follow the directions below. **Just be sure to remove the donor or dealer name link!**

REQUIRED FIELDS FOR ART OBJECTS
1. Select the appropriate Level of Description. For a single work of art or map, this will be "item." For a group of related works of art or maps, this will be "collection."
2. Enter the title of the work of art or map in the Title field. If there is no title, provide a short description as a title. If the collection is a group of art pieces, give the collection a title.
3. Fill in the date or date expression of the item, as you would for a manuscript collection. If there is no date, put "n.d." in the Expression field.

4. If the art object has a VT Foundation Number, include that number in the Repository Processing Note field (i.e. VTF #3810). This field is searchable.
5. Enter an Identifier.
   a. For art objects, the resource identifier should have "Art" in the first box. The second box should be the next available 3-digit number (i.e. Art 233).
   b. For maps, the resource identifier should have "Map" in the first box. The second box should be the next available 4-digit number (i.e. Map.0125).
6. Measure or estimate the extent.
   a. For artworks, calculate the square feet for the Number. Select Square feet as the Type. Include the dimensions of the work in the Container Summary (i.e. 28.5x22.5x1 in.)
   b. For maps, use "0.1" for the Number and select "Cubic feet" as the Type. Include the dimensions and number of maps in the Container Summary (i.e. 18x14 in.; 1 map)
7. Add an instance (or instances, as appropriate).
   a. For a single work of art, add an instance at the collection level. For multiple related works of art, add components or use Rapid Data Entry. The Instance Type should be Graphic Materials. The Container 1 Type should be Object.
   b. For a single map, add an instance at the collection level. For multiple related maps, add components or use Rapid Date Entry. The Instance Type should be Maps. The Container 1 Type should be Object.
   c. Click on Add Location to link the item to a shelf/drawer. The Status and Start Date will auto-fill. Search for the location and select to add it.
8. Create a link to the artist, cartographer, lithographer, etc., name, if this is a new record. If the record is created from an existing accession record, this should be done already, but you will need to remove the link to the donor or dealer's name. See the "Creating Agent Records" section for more information.
9. If the collection relates to one or more collecting areas in Special Collections, add local subject links. If you are comfortable with the Getty Art and Architecture Thesaurus (aat), you may add links to AAT and/or Library of Congress Subject Headings (lcsh).

CLASSIFICATIONS

Any new record you create should include one (or more) Classifications. We will use these to group like materials together via the public interface and have created them based on the format of materials.
1. Click on Add Classification.
2. You can type words from the Classification, if you know it and select to add OR you can click on the arrow to the right of the search box and select Browse.
3. If you browse, click box next to the appropriate Classification(s).
4. Click on Link to Classifications.
5. ASpace will return you to the Resource record.

CREATING RESOURCE RECORDS FOR ARTIFACTS
[SECTION FORTHCOMING]

MAKING A COLLECTION PUBLIC (FINISHING A RESOURCE RECORD)
Once you have finished a Resource record, whether it's for a manuscript collection, record group, art work, map, textile, or something else, there's one important step: Publishing! You'll also want to

1. If you don't already have it open, locate and open the Resource record, either by filtering, searching, or sorting.
2. Click on Edit to make changes.
3. In the Basic Information section, click the Publish? checkbox.
4. Save the record.
5. Congrats, your record is public! (It can take time for the system to index before it appears in the public interface, so don't worry if you can't find it right away.)

CREATING EVENT RECORDS FOR RESOURCES (PROCESSED/CATALOGED EVENTS)

Once a Resource record is completed and the record is public, you will also want to create an Event record to document that the collection, record group, artifact, map, etc., is processed. If there is an existing Accession record, both the Resource and the Accession should be linked to the Event record. If you are working with older materials that do not have an Accession record, you only need to link the Resource record. Once a catalog record is created (for manuscript collections and record groups ONLY), you will also want to create an Event record documenting that action. For more details on creating Event records generally, see the "Creating Event Records for Accessions" section. Below are directions specifically for Processed or Cataloged Event records. Please note: You will need to complete the process below TWICE for a completed Resource record—once for a "Processed" Event record and once for a "Cataloged" Event record.

BASIC INFORMATION
1. Click on Create, then select Event.
2. Select the Type:
   a. If the manuscript collection/record group has been processed (or an addition has been processed), select Processed.
   b. If the manuscript collection/record has been cataloged (or you have updated a catalog record and the Resource does not have a previously linked "Cataloged" Event record) or if published materials have been cataloged, select Cataloged.

EVENT DATE/TIME
1. Leave Date/Time as Date Subrecord.
2. For the Label, select Record Keeping.
3. Select the Type of date. In most cases, this will be a single date on which the activity was accomplished and should be entered as yyyy-mm-dd (i.e. 2015-03-19). If you are working with retroactive materials or do not have specific information, you can use the year/month as yyyy-mm or just the year as yyyy.
4. Select Era ("ce").
5. Select Calendar ("Gregorian").

AGENT LINKS
1. For the Role, select Implementer.
2. Filter for your name (or the name of the person responsible for the actions taken) and select it.
3. If multiple Agents were involved in an activity, click Add Agent Link and repeat Steps 1-2 as needed.
4. Whenever possible, an Event record should have at least one Agent linked to it.

RECORD LINKS
1. Select the Role.

a. If you are linking the Accession record for a manuscript collection, record group, or other accession for which you have created the Resource record as Processed, select Source.
　　b. If you are linking the Resource record you have created as Processed, select Outcome.
　　c. If you are linking the Resource record you have created as Cataloged, select Source. (You do not need to link the Accession record to the "Cataloged" Event record, but you may if you choose.)
2. Filter for the Accession, Resource record, component (item), or Digital Object record to which you would like to link and select it.
3. If the same action was taken on related Accession, Resources, Digital Objects, or components on the same date, you can link addition records by clicking on Add Record Link and repeating Steps 1-2 as needed. In other words, you may link to an Accession as a Source and a Resource as an Outcome when an accession is processed and results in a new Resource record.

CREATING EVENT RECORDS FOR RESOURCES (DIGITIZATION EVENTS)

As part of processing, or at a later date, an entire collection or portions of a collection may be digitized. In order to keep track of what we are digitizing, it is helpful to create an Event record to document this activity. If there is an existing Accession record, both the Resource and the Accession should be linked to the Event record. If you are working with older materials that do not have an Accession record, you only need to link the Resource record.

BASIC INFORMATION
1. Click on Create.
2. Select Event.
3. Select Capture.
4. In the Outcome Note field, enter a description of what materials were digitized (i.e. "Entire collection" or "Materials in Box 1, Folders 2-6; Photographs; Drawings in oversize Folder 3", etc.). This can be done in paragraph form, as text separated by ";", or in a list.

EVENT DATE/TIME
1. Leave Date/Time as Date Subrecord.
2. From the Label drop-down menu, select Digitized.
3. Select the Type of date.
　　a. In most cases, this will be a Single date on which the activity was accomplished and should be entered as yyyy-mm-dd (i.e. 2015-03-19). If you are working with retroactive materials or do not have specific information, you can use the year/month as yyyy-mm or just the year as yyyy.
　　b. If digitization took place over a period of time and you would like to be specific, you can select Range and enter the Begin and End dates.
4. Select Era ("ce").
5. Select Calendar ("Gregorian").

AGENT LINKS
1. For the Role, select Implementer.
2. Filter for your name (or the name of the person responsible for the actions taken) and select it.
3. If multiple Agents were involved in digitizing, click Add Agent Link and repeat Steps 1-2 as needed.

4. Whenever possible, an Event record should have at least one Agent linked to it.

RECORD LINKS
1. Select the Role.
    a. If you are linking to the Accession or Resource record for materials that have been digitized, select Source.
    b. If you are linking to the Digital Object record for materials that have been digitized, select Outcome.
2. Filter for the Accession, Resource record, component (item), or Digital Object record to which you would like to link and select it.
3. Repeat Steps 1-2 for the additional existing records related to digitized materials. Whenever possible, try to link the Event record to the Accession, Resource, and Digital Objects. However, please note that some older collections may not have an existing Accession record in ASpace.

SEARCHING & FILTERING RESOURCE RECORDS
The Filter by Text and Search All Records features work the same way for all record types. For directions on filtering and searching, see the "Filtering & Searching Records" section below.

VIEWING & EDITING RESOURCE RECORDS AND COMPONENTS
3. Once you locate a record, either by filtering, searching, or sorting, click on Edit to make changes.
4. If you do not wish to make changes and have not changed accidentally made changes, you can exit the record. If you have accidentally made any changes, ASpace will ask if you want to save. If you do not, click on Revert to ignore changes.
5. If you are changing or adding information to a record, be sure to click Save Resource before you navigate away from the record.

PRINTING/SAVING A RESOURCE RECORD
Once you have created a Resource record, you may want to print a copy or save a PDF or HTML version somewhere other than in ASpace.

TO PRINT AND/OR SAVE A RESOURCE RECORD
1. Open the Resource record and click on Export at the top right of the record.
2. Select Print Resource to PDF.
3. Under Job Type, select Print to PDF.
4. Filter for the Resource record and select it.
5. Click on Queue Job. This will create a background job. Depending on the size and complexity of the record, it will take a few seconds to several minutes to run.
6. Refresh the page when instructed.
7. Click Download PDF.

EXPORTING EAD AND/OR MARCXML
1. Open the Resource record.
2. Click on Export in the upper right corner of the record.
3. Hover over Download EAD.
    a. Uncheck Include unpublished.
    b. Uncheck Include <dao> tags".

   c. Check Use numbered <c> tags if it is not checked.
4. Click on Export and Download EAD. ASpace will generate an XML file.
5. You can also download MARCXML file by clicking on Export and Download MARCXML. ASpace will generate an XML file.

DIGITAL OBJECTS

Please note: This section has temporarily been removed while we review, change, and document our workflows relating to digital objects. This is a work-in-progress, but please feel free to contact Kira Dietz (kadietz@vt.edu) if you have questions or want to know what we're doing!

DEACCESSIONS

Occasionally, Special Collections deaccessions portions of or a complete collection that was donated by, purchased by, or deposited in the department. ASpace allows you to add information about a deaccession to an Accession or Resource record. Creating a record is same process for an Accession or a Resource.

A deaccession may be associated with only one Accession or Resource record, though an Accession or Resource record may be associated with many deaccession records. An Accession or Resource record displays a list of all associated deaccession records. Because there is a one to one relationship between a specific deaccession record and its related Accession or Resource record, a specific deaccession record may only be created or viewed within the context of the associated Accession or Resource record.

It is assumed that deaccession records created prior to the completion of arrangement and description of a resource will be linked to the accession record, whereas deaccession records created for a processed resource will be linked to the resource record.

CREATING A DEACCESSION RECORD

1. If you are deaccessioning material related to an Accession or Resource record, locate the record and click on Edit.
2. Click on the Deaccession section.
3. Click on Add Deaccession.
4. Select the Portion.
a. Whole if the entire collection is being deaccessioned.
b. Part if only a selection is being deaccessioned.
5. Provide a brief Description of the material being deaccessioned, especially if it is only a portion of the collection.
6. In the Reason field, if known, include a note about why the materials are being deaccessioned.
7. In the Disposition field, note where the materials has been transferred or if it was destroyed.
8. If the Deed of Gift or deposit agreement required notification of disposition to the donor/source and notification as occurred, check the Notification Given box.
9. Leave the date Label as Deaccession.
10. Select Single as the date Type.
11. Enter the day in yyyy-mm-yy form.
12. Scroll to the bottom and click Save Accession or Save Resource.

CLASSIFICATIONS

Classifications are a useful way to create artificial means of grouping records that have something in common. Staff can use Classifications on the staff side of the system to see what materials are of the same format/subject and on the public side, they can be used to generate lists to link to or let researchers find only a certain set of records.

We currently have nine (9) Classifications based on format. When they were created, we worked to retroactively apply them to existing Resource and Digital Object records (and as of August 2017, that process is on-going). These include the following:

- Art Works
- Artifacts
- Digital Objects
- Manuscript Collections
- Maps
- Oral Histories
- Photographs
- Record Groups/University Archives
- Textiles

Classifications should be applied to any Resource or Digital Object records you create. A record may have multiple Classifications. For example, a manuscript collection with significant photographic content might have both Manuscript Collections and Photographs. Or an oral history collection with a focus on campus might have both Record Groups/University Archives and Oral Histories.

You may create additional Classifications, but these should represent broad categories of materials in our collections. If you have new Classifications or ideas for such, please consult with Kira, so we can come up with a plan to retroactively identify existing materials that may also need the appropriate tag.

FILTERING & SEARCHING RECORDS

ASpace has two different functionalities for locating records and information in records. You can search across all record types in the database or you can filter within a record type/module. This section of the manual will cover both!

FILTERING WITHIN RECORD TYPES

ABOUT FILTERING

Filtering within record types works for Access, Resources, Digital Objects, Subjects, Agents, Locations, Events, and Collection Management records. (It works for Classifications, too, but we aren't using those yet!) Within each type of record (or module), it functions the same way. The Filter by Text box will find all records that contain any or all of the text you put in the box anywhere in records of that type.

For example, if you put "john preston" in the Filter by Text box for Accessions, it will retrieve Accession records that include "john preston," "john," or "preston." By default, they are sorted by relevance. You can change the way in which results are displayed using the Sort By box in the upper right hand corner of the results.

You can also use the facets on the right side of any module to limit the list of record. You can also use facets in conjunction with filtered search results to winnow them down further. Depending on which module you are in, you will different facets. If you have already filtered your list by text and/or used another facet, the facets on the left side will ONLY reflect the subjects, dates, levels, content types, etc. in the records remaining in your results.

You can clear filters and/or facets by clicking on "Clear All" at any time. This should return you to the full list of records for the module. You can clear any individual filters or facets by clicking on the "x" to the side of the term(s).

FILTERING HINTS

While filtering to locate records takes a little trial and error, here are some helpful hints:

- If you are looking for a record by its Identifier, enter the Identifier in the Filter by Text box with either spaces or dashes between the parts of Identifier (i.e. "acc 2013 050" and "acc-2013-050" OR will both find the same results).
- If you want to pull a set of records based to the top of the results list, use a part of the Identifier (i.e. use "ms-2015" to find all the collections with Ms2015 as the start of their manuscript number).
- Since all our records were imported using the migration tool on May 18, 2016, you cannot search for records created on or before that date. However, going forward, you should be able to find records created or last modified on a given date by entering the date (yyyy-mm-dd) in the Filter by Text box.
- Since all our records were imported using the migration tool on May 18, 2016, they are all labeled as being created and (at least initially) last modified by "admin." As a result, you cannot search for records created by a specific user and searching for records last modified by a specific user will only work if there have been modifications since. However, going forward, you should be able to find records created or last modified by yourself or others by entering their username in the Filter by Text box.

SEARCHING ALL RECORDS

ABOUT SEARCHING

Whereas filtering looks through on the set of records in a given module, searching will essentially look for a word or words in any fields within records as well as administrative information about record (created by/created date and last modified by/last modified date).

BASIC SEARCH

To search all records, enter a word, words, username, date, etc., in the Search All Records box. Your results list will show the Record Type, the Title, the created by/created date, and the last modified by/last modified date. By default, search results are sorted by relevance. You can change the way in which results are displayed using the Sort By box in the upper right hand corner of the results.

From the search results list, you can view and/or edit most records. Some record types can only be viewed from the search results, but once you view the record, you can make additional edits.

ADVANCED SEARCH

1. To build a more complex search, click on the down-pointing arrow next to the Search All Records box. This will display a single row with three columns.
2. Column 1 is either a blank or a "Not."
   a. If you are looking for a word, words, or phrase, leave the box blank.
   b. If you are looking to exclude a word, words, or phrase (i.e. find all records that don't include the name "Preston"), select "Not" and put the term(s) you wish to exclude from results in Column 3.
3. Column 2 allows you to select a certain type of field to search.
   a. Creator will look for matches in agents linked to records as creators.
   b. Keyword will search throughout all records.
   c. Notes will search in text fields designated as Notes (i.e. Notes in a Resources record). This will NOT search every text-based field.
   d. Subject will search for matches in subjects and in subjects linked to records.
   e. Title will search in text fields designated as Title (this includes Title fields for Accession, Resource, and Digital Object records, as well as any titles of components for Resources and Digital Object records).
4. Column 3 is for your text. If you include more than one word in this box, the search functionality will match all instances of each word. If you use quotation marks (" ") around your search term, it will match the exact term.
5. You can add as many rows to an advanced search as you would like. Additional rows can be added by clicking on the green + button and selecting the type of row. **Please note:** you can combine different types of rows in your search.
   a. Text creates a simple row with the same options as Step 3 above.
   b. Date creates a row with options for using Created or Updated (last modified on). It also allows you to select Greater Than (searches for dates after the specified date), Less Than (searches for dates before the specified date), or Equals (searches for exact date matches). Click on the empty field to bring up the calendar OR type in a date (yyyy-mm-dd).

     c. Boolean creates a row with options for Published? or Suppressed? which allows you to search for records that are published/suppressed by selecting True or records that are not published/suppressed by selecting False.
6. As you add rows, you will have the option to use And/Or/Not to include or exclude content.
7. After you have filled in the rows, click Search.
8. You can clear your search at any time by clicking the Clear button. **Please note:** This will clear all search fields AND the search results.

USER SETTINGS & PREFERENCES

As an individual user, there are certain settings over which you have control. ASpace has been set up with certain defaults for the repository (suppressed records are visible, a pre-populated template for Resource records will be created when you create a new record, which fields are visible in each module, and the default order of the notes in a Resource record).

The first time you log in to ASpace, you may want to check your personal user preferences. They override any default settings for the repository. You are welcome to maintain separate settings, but keep in mind it may result in some minor differences between the directions in the manual and your experiences.

1. Next to your login ID at the upper right of the screen, click on the down-pointing arrow.
2. Select My Repository Preferences.
3. By default, your settings should reflect those established by the repository's.
    a. Show Suppressed? should be checked.
    b. Publish? should not be checked.
    c. Pre-populate Records? should be checked.
4. Accession, Resource, and Digital Object Browse columns (the columns visible when you are browsing any of those modules) should be set. If you wish to override the default, you can select a different option from the drop-down lists.
5. The default note order is set for Resource records (though this will also apply to notes added to Accession or Digital Object records). It is HIGHLY RECOMMENDED that you not change this order.
6. If you have made any changes, click Save.

APPENDIX A: NOTE ORDER

The following is a comprehensive list of all required and optional notes used in a Resource record. **Please note:** It is unlikely you will ever use all of these notes in a single collection and you may not ever use some of them, so don't worry if you are unfamiliar with some of them. The notes have been pre-programmed to appear in this order in ASpace records. However, you can reorder them, if needed, by dropping and dragging.

Finding aid sections are given in brackets. The ASpace Label is listed first. The ASpace name from the drop-down list is provided in parenthesis.

NOTE ORDER

[Descriptive Summary]
Location (Location note in ASpace Physical Location in VH)
Language(s), if more than the one (Language of Materials note)
Abstract (Abstract)

[Administrative Information]
Access Restriction (Conditions Governing Access note)
      Legal Status (Legal Status note)
Use Restriction (Conditions Governing Use note)
Preferred Citation (Preferred Citation note)
Acquisition Information (Immediate Source of Acquisition note)
Alternative Form Available (Existence and Location of Copies note)
Accruals (Accruals note)
Appraisal (Appraisal note)
Custodial History (Custodial History note)
Processing Information (Processing Information note)

Biographical/Historical Information (Biographical/Historical Information)
Scope and Content (Scope and Content note)
Arrangement (Arrangement note)

[Adjunct Descriptive Data]
Bibliography (Bibliography)
File Plan (File Plan note)
Location of Originals (Existence and Location of Originals note)
Other Finding Aids (Other Finding Aids note)
Technical Requirements (Physical Characteristics and Technical Requirements note)
Related Archival Materials (Related Archival Materials note)
Separated Materials (Separated Materials note)

APPENDIX B: ENCODING ANALOGS

ASPACE FIELD/NOTE TO EAD TAG TO MARC FIELD

ASpace Field/Note	EAD Tag	MARC Field
Title	<unittitle>	245$a
Date/Date Expression	<unitdate>	245$f
Identifier	<unitid>	099$a
Extent	<physdesc>	300$a
Language	<language>	546$a
Creator (Person/Family)	<origination>	100$a
Creator (Corporate Body)	<origination>	110$a
Access Restriction	<accessrestrict>	506$a
Use Restriction	<userestrict>	540$a
Preferred Citation	<prefercite>	524$a
Acquisition Information	<acqinfo>	541$a
Alternate Form Available	<altformavail>	530$a
Biographical/Historical	<bioghist>	545$a
Scope and Content	<scopecontent>	520$a
Arrangement	<arrangement>	351
Related Material	<relatedmaterial>	544$a
Separated Material	<separatedmaterial>	544$a
Persons (Subjects)	<persname>	600$a
Family Names (Subjects)	<famname>	600$a
Corporate Names (Subjects)	<corpname>	610$a
Subjects	<subjects>	650$a
Geographical Names	<geogname>	651$a
Titles (Subjects)	<title>	630$a
Functions	<function>	657$a
Genre and Form Terms	<genreform>	655$a
Occupations	<occupation>	656$a
Names (Subjects)	<name>	none
EAD FA Location	none	856$u
Local Subjects	<subjects>	none, but will export as 650$a