

**Best Practices for Input of Agent Records in ArchivesSpace**  
**Recommendation of the UNCL ArchivesSpace Best Practices Task Force**  
**Approved May 2, 2019; revised July 8, 2019**

Agent Record Workform (fields presented in the order in which they appear in ArchivesSpace)

- Basic Information
  - Agent Type
    - Person
    - Family
    - Corporate Entity
  - Publish? Yes
- Dates of Existence – Optional
  - Label – Existence
  - Expression – free text for date range
  - Type – Range (even for living persons with open date ranges)
  - Begin – Birth date; date organization was founded, merged, or otherwise began operating under this name; etc.
  - End – Death date; date organization ceased to exist; etc.
  - Certainty – Approximate (default)
  - Era – ce (default)
  - Calendar – Gregorian (default)
- Name Forms – Note that the fields available in this subrecord differ depending on the Agent Type selected.
  - For Person Agent Type
    - Authority ID – Leave blank for Local sources; optionally include authority number for Library of Congress Name Authority File, if applicable.
    - Source – Local sources or Library of Congress Name Authority File
    - Rules – DACS
    - Name Order – Indirect (last name first)
    - Prefix – Ms., Dr., etc. – Generally only include if necessary to differentiate the name.
    - Title – Leave blank.
    - Primary Part of Name – Last name
      - If name comes from the Library of Congress Name Authority File, this is the part of the MARC 100 \$a that precedes the comma
    - Rest of Name – First name, including middle name/initial if known
      - If name comes from the Library of Congress Name Authority File, this is the part of the MARC 100 \$a that follows the comma
    - Suffix – Jr., Sr., etc.
    - Fuller Form – use only for Library of Congress authorized names that have a fuller form in parentheses; otherwise, leave blank
      - For names in the Library of Congress Name Authority File, this is the part of the name that is within the MARC 100 \$q
      - Do not enclose in parentheses (ArchivesSpace supplies them automatically in the display)
    - Number – Leave blank.

- Dates – use for the date portion for Library of Congress authorized name forms, if present
    - Qualifier – Leave blank.
    - Sort Name – leave Automatically generate checked
  - For Family Agent Type
    - Authority ID – Leave blank for Local sources; optionally include authority number for Library of Congress Name Authority File, if applicable.
    - Source – Local sources or Library of Congress Name Authority File
    - Rules – DACS
    - Prefix – Leave blank.
    - Family Name – The predominant surname of the family.
    - Dates – Optional, if known.
    - Qualifier – Leave blank.
  - For Corporate Entity Agent Type
    - Authority ID – Leave blank for Local sources; optionally include authority number for Library of Congress Name Authority File.
    - Source – Local sources or Library of Congress Name Authority File
    - Rules – DACS
    - Primary Part of Name – Full name (if no subdivisions) or first part of compound name (e.g.: University name)
    - Subordinate Name 1 – Second part of name (e.g.: Department name)
      - Note: Names are ordered from parent organization to smallest unit. In most cases, only the highest and lowest levels are listed, following Library of Congress practice (e.g.: University, Department; NOT University, College, Department).
    - Subordinate Name 2 – Third part of name, if applicable
    - Number – Generally, leave blank. May be applicable for legislative terms, conference designations, etc.
    - Dates – Generally, leave blank. May be necessary to align with Library of Congress Name Authority records, if applicable.
    - Qualifier – Generally, leave blank. Note that if the authorized Library of Congress form of name includes a parenthetical qualifier, it should be included with the Primary Part of Name or Subordinate Name as appropriate, because ArchivesSpace generates incorrect MARCXML encoding for qualifiers.
    - Sort Name – leave Automatically generate checked
- Add Name Forms for variant forms of a name, e.g.: name change due to marriage or other life event, a known nickname, longer/shorter version of organization’s name, initials, etc.
  - A variant form may be from Local sources, even if the authorized name is from the Library of Congress Name Authority File. The reverse is not true.
  - For Corporate Entities, it is recommended to include additional name forms for earlier/later names of the organization when an organization has undergone one or more name changes.

- It is recommended to use the current or most recent form of the name as the authorized form and display name, with earlier forms of the name included as additional name forms.
  - It is recommended but optional to include use dates, when known, for earlier forms of the organization's name.
  - If an organizational name change was accompanied by a significant change to the organization's structure, mission, or character, it may be preferable to have separate Agent records, connected to one another with earlier/later Related Agent links.
    - Example: The University of Nebraska at Omaha School of Communication merged with the College of Fine arts to form the College of Communication, Fine Arts and Media. All three of these entities would have separate Agent records.
  - For corporate name changes, either the single-record or multi-record approach is acceptable, depending on which is deemed most useful to the patrons. However, be mindful that Agent records are shared across all repositories in an instance, and that others outside your institution will need to be able to easily find and use your Agent records.
- Date(s) of Name Use – Optional, as decided by each institution.
  - Example: UNO uses for employment dates for the Agent records of current and past Archives and Special Collections faculty and staff members.
- Contact Details – Include if you have contact information for the person, family member, or a designated point of contact for an organization
- Notes
  - Note Type: Biographical/Historical – Write a brief paragraph expressing whatever biographical or historical details are known about the person, family, or corporate entity. Include description of any association with the university, if applicable. Some research may be required. Cite sources or provide links to more detailed information if applicable.
  - BUG WORKAROUND: HYPERLINKS. For citations that include hyperlinks, there is a bug in ArchivesSpace which may render URLs invisible in the public view if they were added as an html-encoded link (i.e.: wrapping the URL in <a href=" or <extref href=" tags) in the *text* subnote of the Biographical/Historical note. In these cases, consider adding a *citation* subnote and pasting the URL into the href field with no encoding (no href tag needed, as the href field automatically generates a hyperlink).
    - Note that if you add a citation subnote, you will still need also need the text subnote for the body of your Biographical/Historical note. If you have multiple citations, you will need to add separate citation subnotes for each one of them.
    - As of February 2019, the vanishing URL bug has only been observed in *text* subnotes of Biographical/Historical notes in Agent records.
  - BUG WORKAROUND: DELETE KEY. There is a known bug in ArchivesSpace, such that when editing a note field (any type of note), if you delete some characters with the Delete key, then after saving the record, the deleted characters are restored to the note. That is, the removal doesn't take. By contrast, if you use

the Backspace key to delete the characters, they are correctly removed and stay gone. Further, if you highlight the text and then use the Delete key, it correctly stays gone after saving and reloading. The deleted text only reappears if the Delete key is used on individual characters one at a time, without highlighting. (That is, if you position the cursor in front of the to-be-removed text and just tap the delete key.) Until this bug is patched, avoid using the Delete key when editing any type of note in any type of record in ArchivesSpace.

- **TL;DR: Warning! Do NOT use the Delete key in a subnote!**

- Related Agents – Link to other Agent records if applicable
  - Associative Relationship
    - Relationship Type – Associative with Related.
    - Related Agent – Link to other Agent record.
    - Description – Optional. Describe the nature of the relationship. Remember that the Related Agent link goes both ways, so whatever text you type here must make sense when viewed within either of the associated Agent records.
    - Dates – Optional, if known.
      - Label – Agent Relation
      - Expression – free text for date range
      - Type – Range or Single as appropriate
      - Begin – Start date of association (date married, began employment, etc.)
      - End – End date of association (death of spouse, retirement, etc.)
      - Certainty – Approximate (default)
      - Era – ce (default)
      - Calendar – Gregorian (default)
  - Earlier/Later Relationship – Use only for Corporate Entities and Families, linking only to immediate predecessors and/or immediate successors.
    - Recommendations:
      - If more than two Agent records are to be connected with Earlier/Later Relationship links, the links should form a clear chain from one Agent record to the next in sequence.
      - For simple Corporate Entity name changes, it is recommended to document the name changes through additional name forms on the same Agent record, rather than separate Agent records linked through relationships.
      - Do not use Earlier/Later Relationships for Persons. Instead add additional name forms on a single Agent record to include all names used in the person's lifetime.
    - Relationship Type – Earlier Form of Related OR Later Form of Related.
      - Note: The public display is confusing, making it seem like these relationships point in the opposite direction. "Related" always refers to the record you are linking to, so use "Earlier Form of Related" when the Agent you are editing is the predecessor and the Agent you are linking to is the successor.
    - Related Agent – Link to other Agent record.

- Description – Unnecessary as the Relationship Type expresses this clearly.
    - Dates – Optional, if known
  - Subordinate/Superior Relationship – Use only for Corporate Entities.
    - Relationship Type – Is Subordinate to Related OR Is Superior to Related
      - Note: The public display is confusing, making it seem like these relationships point in the opposite direction. "Related" always refers to the record you are linking to, so use "Is Subordinate to Related" when the Agent you are editing is a subunit of the Agent you are linking to.
    - Related Agent – Link to other Agent record.
    - Description – Unnecessary as the Relationship Type expresses this clearly.
    - Dates – Optional, if known
  - Parent/Child Relationship – Use only for Persons.
    - Relationship Type – Parent of Related or Child of Related, as applicable
      - Note: The public display is confusing, making it seem like these relationships point in the opposite direction. "Related" always refers to the record you are linking to, so use "Child of Related" when the Agent you are editing is the child and the Agent you are linking to is the parent.
    - Related Agent – Link to other Agent record.
    - Description – A brief sentence about the family, listing all relevant/known parents and children. (Not a full genealogy or biography.)
    - Dates – Optional, if known.
      - Label – Agent Relation
      - Expression – free text for date range
      - Type – Range or Single as appropriate
      - Begin – Birth date
      - End – Death date
      - Certainty – Approximate (default)
      - Era – ce (default)
      - Calendar – Gregorian (default)
- External Documents – Optional. Include any reference sources used for the Biographical/Historical note.