

UNCL ArchivesSpace Best Practices Task Force
Resource Record Minimum Required and Desired Fields
Institutional Best Practices
Last revised March 9, 2020

Note that the absence of any field from the below standards does not mean that the field may not be used in our repositories. No field that exists in ArchivesSpace is prohibited from use by any institution that wishes to use it in their repository, whether broadly used within that repository or narrowly used for a single collection or item benefiting from such field. These proposed standards are intended to be guidelines for the required and most commonly used fields—a floor, not a ceiling.

Best practices for Accession records are included in this document only insofar as they impact Resource records. Accession records are inherently local, and many institutions choose to keep them suppressed from public view. If you decide to make your Accession records public, please try to mirror the Resource standards as closely as possible.

Fields are presented in the order in which they appear in an ArchivesSpace Resource record:

- **Title – Required**
 - Formulate according to DACS
 - Example: Name of individual or organization + Collection, Papers, Records, or material specific term such as Letters, Scrapbooks, etc.
 - Donor agreement may stipulate a title for artificial collections
 - Accession titles may include the accession number at the end of the title.
- **Identifier – Required**
 - Each institution shall follow their own established pattern to generate unique identifiers, unless that pattern results in identifiers identical to another campus's identifiers.
 - Identifier prefixes for each campus must be unique within the UNCL system
 - Identifiers for accessions may differ from their corresponding resources
 - Accession identifiers should sequence chronologically
 - Resource identifiers should include a code relating to collecting area
- **Level of Description – Required**
 - Generally should be Collection for most resource records
 - Other options rare; you'll know if you have one
- **Resource Type – Required**
 - Select most appropriate term from drop menu
 - For mixed materials, select Collection
- **Language (i.e.: Languages and Scripts of the Material) – Required**
 - System allows selection of only one language from the drop menu. Select the language of the bulk of the material.
 - If resource contains multiple languages, the other languages may be listed in a note.

- Script may optionally be selected from the drop menu. For English language materials, select Latin script.
- **Date – Required**
 - Best practice is to include both expression and ISO dates.
 - Minimum requirement is to include expression.
 - Expression field is free-text and human-readable.
 - ISO field is for machine readability and sortability.
- **Extent – Required at resource level; recommended but optional at component levels.**
 - Input exact or approximate value if readily ascertainable; otherwise supply "undetermined" as placeholder.
 - From the portion menu, select whether the extent statement applies to the whole or part of the resource.
- Agent Links (i.e.: names of Creators, Donors, and Subjects) – Recommended if known
 - Please refer to the document: *Best Practices for Input of Agent Records in ArchivesSpace*.
 - Always search for existing agent records before creating new.
 - Administrative/Biographical History (Agent Records) – Recommended but optional
- Subject Links – Recommended but optional
 - Please refer to the document: *Best Practices for Input of Subject Records in ArchivesSpace*.
 - LCSH, MESH, AAT, Local, and other subject headings are all acceptable, and the source of the subject should be identified within the subject record.
 - Always search for existing subject headings before creating new.
 - Do not create subject records for persons, organizations, and families. Link to agent records with the role of subject.
 - If an existing name was established as a subject instead of an agent, fix as found.
- Finding Aid & Administrative Information – Language and Script fields are required; other fields are recommended but optional
 - Displays to public even if left blank.
 - Recommended fields:
 - Finding Aid Title – Same as resource title.
 - Finding Aid Author – All staff members contributing to the description, with names in direct order, separated by semicolons.
 - Description Rules – Use "Describing Archives: A Content Standard" unless another standard applies.
 - **Language of Description – Required** -- Usually English, though UNL has some Czech-language finding aids.
 - For bilingual or multilingual finding aids, list all languages.
 - **Script of Description -- Required** -- Usually Latin.
 - Edition Statement – Increment based on significant revisions to the finding aid, including accruals.

- Optionally include a revision statement when incrementing the edition statement.
 - Finding Aid Status – Select the appropriate option from the drop menu. Generally, select Unprocessed for new collections, and switch to In Progress once processing begins.
- Notes – Required and recommended note fields for the resource level
 - **Scope and Content – Required at Collection level; recommended but optional at component level**
 - Provide a brief overview of the collection, created by a staff member or received from the donor.
 - In Accession records, this field is called Content Description. If spawning a Resource from an Accession, the Scope and Content note will automatically populate with any text from the Content Description note.
 - Physical Description – Recommended but optional
 - Describe any unusual physical conditions or preservation concerns
 - Arrangement – Recommended but optional
 - For an unarranged collection, use the text: "Collection has not yet been arranged and described."
 - As collection is processed, edit this to reflect series or other arrangement.
 - Conditions Governing Access – Recommended but optional
 - This note addresses whether the collection is open or closed for research use, or if there are any restrictions imposed by the donor or the institution.
 - To better facilitate policy updates, it is preferable to link to the institution's policy on a webpage that will be maintained separately, rather than pasting the full policy into this field.
 - If unique conditions are present, such as restrictions imposed by the donor, these should be input into this field as a free-text note, in addition to the link to the regular policy.
 - Conditions Governing Use – Recommended but optional
 - This note addresses copyright law and other laws and policies that may restrict usage of the material.
 - To better facilitate policy updates, it is preferable to link to the institution's policy on a webpage that will be maintained separately, rather than pasting the full policy into this field.
 - If unique conditions are present, such as restrictions imposed by the donor, these should be input into this field as a free-text note, in addition to the link to the regular policy.
 - Preferred Citation – Recommended but optional
 - [Title of collection,] [Archive], [Library], [University].
 - Processing Information – Recommended but optional
 - Accruals Note – Recommended but optional, if applicable
 - Describe source and schedule for which new material will be added to the collection in the future, if known.

- **Custodial History Note - Required if known**
 - In Accession records, this field is called Provenance. When spawning a Resource from an Accession, the Provenance note does NOT automatically populate the Custodial History Note. You must manually copy and paste it.
 - Add any provenance information, if known.
 - If provenance is unknown, note that collection was received prior to [this year, or whatever earlier date can be reasonably estimated].
- Existence and Location of Copies – Recommended if applicable
 - Identify location of known copies of the material outside of the collection, including copies elsewhere within the institution.
- Physical Characteristics and Technical Requirements – Recommended if known
 - While not required, this field is recommended for describing anything influencing the renderability of the material, including the need to use a computer, specific software, specialized playback device (such as a VHS or DVD player), or any other intermediary tools or equipment to access the content.
 - This field may also be used to describe the handling considerations of oversized items that are unwieldy to retrieve and use.
- Physical Location -- Recommended if applicable
 - Identify materials that are stored off-site or in other conditions that would delay retrieval.
 - Note: At this time, this is the nearest-available ArchivesSpace equivalent to the DACS "Physical Access" note.
- Related Archival Materials – Recommended if known and if applicable
 - Use this field to indicate "the existence and location of archival materials that are closely related to the materials being described by provenance, sphere of activity, or subject matter, either in the same repository, in other repositories, or elsewhere." (DACS 2013, 6.3)
- Separated Materials --Recommended if applicable
 - This note "encodes information about materials associated by provenance to the described materials but that have been physically separated or removed. These items may have been destroyed (including duplicates), moved to another area of the repository/another repository, or returned to the creator. This is not the same as<relatedmaterial>, which is not related to the materials by provenance, accumulation, or use. This element is comparable to ISAD(G) data element 3.5.3 and MARC field 544 with indicator 0." (<http://ead3.eadiva.com/separatedmaterial/>)
- Notes – Tips, tricks, and warnings applicable to all Note fields
 - Notes are all free-text fields.
 - Paragraphs will run together in the public view if separated by a single carriage return, but two consecutive carriage returns will correctly display as a paragraph break.

- ArchivesSpace has a 65,000 character limit for note fields. Notes longer than this will need to be split into separate fields.
- In note fields with mixed content enabled, the built-in wrap encoding is permitted, but not required.
- HTML encoding is permitted, but discouraged, except for hyperlinks.
 - In cases where complex displays are required, HTML may be used with the understanding that it might break during export to EAD or other standards.
- **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!**
- External Documents -- Optional, as determined by each institution for their own repository.
 - If spawning the Resource from an Accession, this subrecord should auto-populate.
 - Reference any files supplied by the donor
 - Reference links to websites, citations to articles, etc., referencing the collection
 - Title (of document, web page, etc.)
 - Location (URL, location on shared drive, location in file cabinet, etc.)
 - Publish? Optional, as determined by each institution for their own repository.
- Rights Statements -- Optional, as determined by each institution for their own repository.
 - If spawning the Resource from an Accession, this subrecord should auto-populate.
 - There does not appear to be any way to make this public. The Permissions and Restrictions statements must be manually copied to the Notes section
- Instances -- Optional, as determined by each institution for their own repository.
 - Type – Select the most appropriate (e.g.: Mixed Materials, Text, Realia, etc.)
 - Top Container
 - Type to search Containers already attached to the Resource.
 - Browse to search existing Containers not attached to the current Resource. (For example, Containers attached to an Accession record or to a different Resource.)
 - Create to add a new Container record, if none exists.
 - Child Type – Optional, for a container inside the Top Container (for example, a Folder inside a Box).
 - Child Indicator – Optional, for the enumeration of the Child container.
 - Grandchild Type – Optional, for a container inside the Child container.
 - Grandchild Indicator – Optional, for the enumeration of the Grandchild container.

- Deaccessions -- Optional, to describe materials that have been removed from the collection.
- Collection Management -- Optional, as determined by each institution for their own repository.
- Classifications -- Optional, as determined by each institution for their own repository.
- User Defined -- Do not use.