University of California

CDL
California Digital Library

## OAC/Calisphere Contributor User Guide to ArchivesSpace

This user guide is intended for institutions that are utilizing ArchivesSpace, to create Resource and/or Digital Object records for contribution to the Online Archive of California (OAC) and Calisphere websites.

For detailed information on utilizing ArchivesSpace, which is beyond the scope of this guide, consult the ArchivesSpace Help Center documentation.

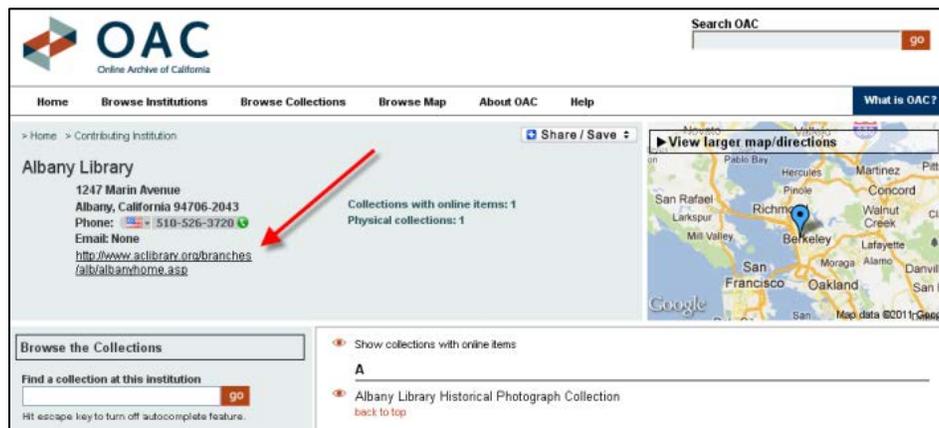## 1. Repository Record Requirements for OAC

Your Repository record in ArchivesSpace needs to contain some basic information, which will appear in Resource and/or Digital Object record exports.

To edit the current settings, select **System → Manage Repositories**, select your repository → **Edit**, make the edits you want, and then click **Save Repository.**
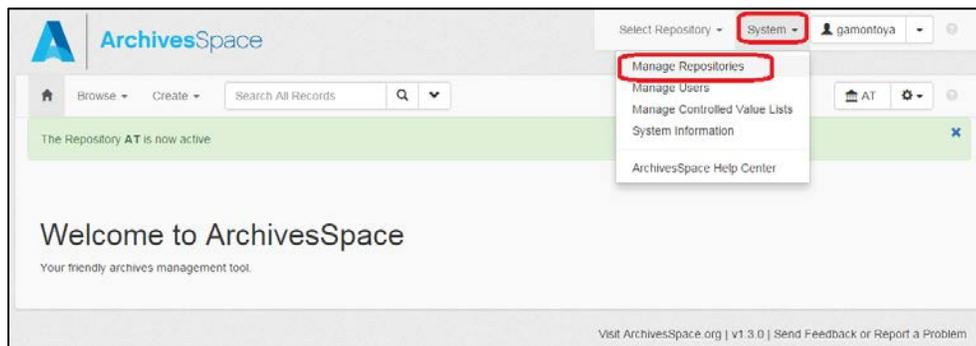
The following data is required in the "Repository Fields" section in order to meet *OAC Best Practice Guidelines for Encoded Archival Description, Version 2.0* (OAC BPG EAD) specifications:

- **Repository Short Name**
- **Repository Name**
- **Organization / Agency Code**
- **Home Page URL** (Note: Use the form of your institution's URL that appears on your institution's landing page in OAC)

2. Resource Record Requirements for OAC

ArchivesSpace supports the exporting of Resource records into EAD finding aids. These EAD finding aids can then subsequently uploaded and published in OAC.

The following tables list out ArchivesSpace data entry fields that should have data, in order to meet DACS' single-level minimum requirements, a subset of the *OAC Best Practice Guidelines for Encoded Archival Description, Version 2.0* (OAC BPG EAD) "OAC Basic" encoding scheme. The OAC Basic encoding scheme reflects single-level descriptive outputs at any level, but typically for large accumulations such as collections, record groups, fonds, or record series. It can, however, only describe materials at one explicitly articulated level and does not support multilevel encoding of subsequent lower levels (the "OAC Full" encoding scheme).

The third column in these tables references the page in which the elements and attributes guidelines tables appear in the OAC BPG EAD. Please refer to these pages for more detailed information.

From the **Main Screen**, select **Browse by Resources** and click on the **"Create Resource"** button. Then add the following data.

Basic Information, Dates, and Extents

ArchivesSpace Label	EAD Mapping	OAC BPG EAD Summary
Title	<unittitle>	Indicate the title of the collection.
Identifier	<unitid>	Indicate the collection or call number.
Level of Description	<archdesc>	Specify the level of description, e.g., collection-level, item-level.
Language	<langmaterial>	Indicate the predominant language of the materials in the collection.
Dates (Label, Expression, Type)	<unitdate>	Indicate dates for the collection.
Extents (Portion, Number, Type)	<extent>	Provide a numeric value and characterization of the size or extent of the collection.

Finding Aid Data

Archivists Toolkit Label	EAD Mapping	OAC BPG EAD Summary
EAD Location	<eadid> URL	Encode the ARK URL for the finding aid, if one has been pre-assigned to the finding aid — or if the finding aid is already published in the OAC. (To request an ARK URL, contact us at oacops@cdlib.org). *Example of an OAC finding aid's ARK URL:* http://www.oac.cdlib.org/findaid/ark:/13030/kt5b69q5bc
Finding Aid Title	<titleproper>	Indicate the *formal title* of the finding aid itself (e.g., "Guide to the Jane Doe Papers") and not the title of the collection being described.
Finding Aid Filing Title	<titleproper> TYPE="FILING"	Indicate the *filing title* of the finding aid. Note that the filing title is a modified form of the formal title. The filing title appears in browsing lists on the OAC. For papers created, collected, or associated with an individual, the filing title should begin with the individual's last name, followed by the first name and optional middle initial, which should both be in parentheses: Abel (Theodore F.) Papers When two individuals are responsible for a collection and they share the same last name, put the last name at the beginning of the filing title. Then list both names and, optionally, a middle initial, which should both be in parentheses: French (Helen D. and Paul M.) Collection When the individuals do not share the same last name, list the most appropriate name first, with corresponding first name following in parentheses, and then the second last name with its corresponding first name in another set of parentheses: French (Helen D.) and Hightower (Paul) Collection Corporate names and family names should generally be listed as in their established form or as they appear. Use appropriate abbreviations such as Corp., Co., Inc., Misc., Dept., etc. to maintain brevity: Bidwell Family Papers Crowley Maritime Corp. Record

Agent Links

On the "Agent Link" of the Resource record, select **Add Agent Link** and indicate the personal, family, or corporate name(s) of the predominant creator(s) of the collection. Add the required **Role** attribute.

ArchivesSpace Label	EAD Mapping	OAC BPG EAD Summary
Agents	<…name>	Indicate personal, family, or corporate name(s) as creators.

Notes

This section provides 20 notes that can be added at the resource level or at any component level. The following notes are required for OAC:

- Use one **Abstract** for a brief summary of collection contents and context at highest level only.
- Use one **Conditions Governing Access** note to record particular access restrictions, even if the collection has no access.
- Use one **Scope and Contents** note to provide a prose statement summarizing the document types, formats, and topical coverage of the collection.
- Optionally, use one or more **Biographical / Historical** note(s) to encode concise essays or chronologies providing information about the creator(s) or collector(s) –- *note that this is preferred and not mandatory/required.*

ArchivesSpace Label	EAD Mapping	OAC BPG EAD Summary
Abstract		Provide a brief summary of the scope/content of the collection.
Conditions Governing Access note	<accessrestrict>	Note particular access restrictions, even if the collection has no access restrictions. In the latter case, use the text "Collection open for research" or a similar statement.
Scope and Contents note	<scopecontent>	Provide a prose statement summarizing the scope/content of the collection, and details about the document types, formats, and topical coverage of the collection.
Biographical/Historical note	<bioghist>	If applicable, provide a concise essay or chronology with information about the creator(s) or collector(s).

Linking from Resource Records to Digital Objects

ArchivesSpace supports interlinking between Resource records and digital objects, where the latter are managed and published in an external system (e.g., CONTENTdm, Omeka, etc.). The links will be expressed in Resource record exports (EAD finding aids) that are published in OAC. Here is an example display: http://www.oac.cdlib.org/findaid/ark:/13030/kt6h4nf6qc/. Below is a summary of the process.

- Browse or search for the Resource record; edit the record.
- Within the Resource record, select the particular component level description (from where you'd like to add a link to a digital object). For example, select a collection-level description -- or an item- or file-level description.
- Within the particular component level description, navigate to the **Instances** section.
- Select the **Add Digital Object** button. Select the option to **Create** a new Digital Object.
- You'll now be presented with a new Digital Object record.
    - Add a **Title**, to briefly characterize the digital object(s) (e.g., if linking to a group of digital objects: "Selected digital versions of items from the Janet Doe collection").
    - Provide an **Identifier** for the digital object(s). If linking to a group of digital objects, this could be the URL to the results set.
    - Enable the **Publish** checkbox option.
    - In the **File Versions** section and within the **File URI** field, enter the complete URL to the digital object(s).
    - Save the record once the URL is added.
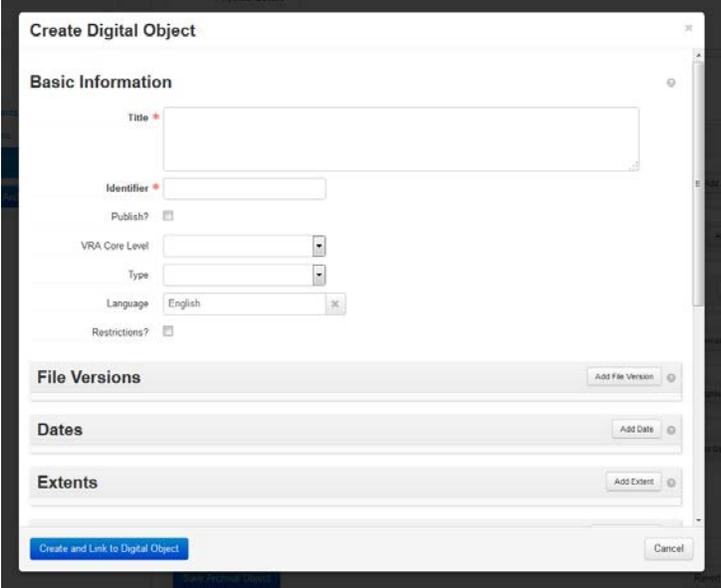
- Repeat the above steps for any other digital objects that you'd like to link to, from the Resource record.

Once you've completed these steps, export the Resource record with <dao> links (see **Section 4**).

Linking from Resource Records to Supplemental PDF Inventories

You can attach supplemental PDF files to your EAD collection guides, in cases where you have longer collection inventories and other descriptive information that is not encoded in EAD. For an example of what this looks like, check out the "Additional Collection Guides" links at:
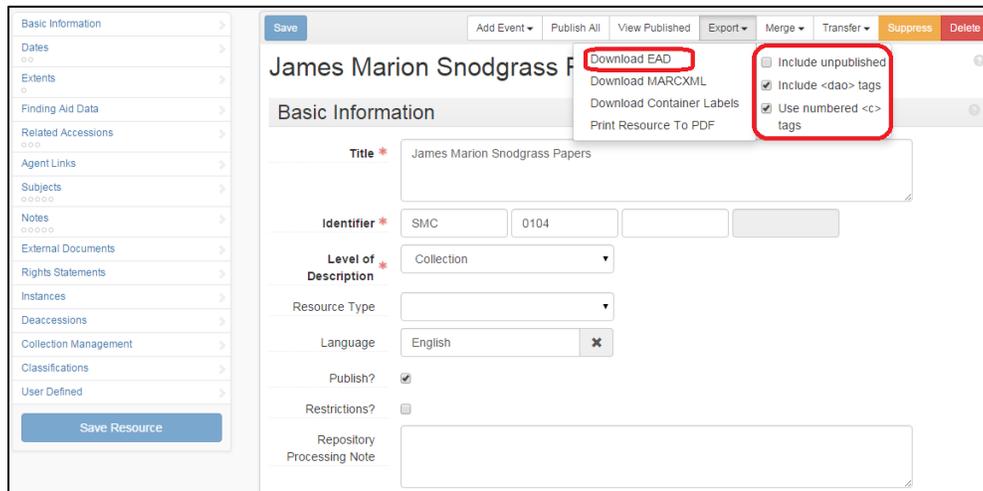http://www.oac.cdlib.org/findaid/ark:/13030/tf3m3nb37q

For instructions on creating links to supplemental PDF inventories, see
https://help.oac.cdlib.org/support/solutions/articles/9000093762-submitting-supplemental-pdf-finding-aids

4. Exporting Resource Records as EAD Files

- If you described subordinate components (<dsc>), the OAC EAD BPG requires numbered component tags in the output. Check "Use numbered <c> tags".
- If the finding aid has associated digital objects, check "Include <dao> tags".

5. Publishing EAD Files in the OAC: Note on voroEAD Production Validation

Our voroEAD Production ingest process supports the publication of EAD files generated from ArchivesSpace. Note that the system will first attempt to validate files against the EAD DTD, before validating them against the EAD schema. The EAD DTD-specific processing errors can hence be ignored:

```
/voro/data/oac-ead/submission/[directory]/[filename].xml:2: element ead: validity
error : standalone: ead declared in the external subset contains white spaces nodes
/voro/data/oac-ead/submission/[directory]/[filename].xml:2: element ead: validity
error : No declaration for attribute schemaLocation of element ead
/voro/data/oac-ead/submission/[directory]/[filename].xml:2: element ead: validity
error : No declaration for attribute xmlns:ns2 of element ead
[etc.]
```

If the file successfully passes the EAD schema validation, you will receive a "File Queued for Publication" confirmation at the end of the processing results log.

6. Questions? Problems? Who to Contact for Assistance

Report problems or send requests for support to our helpdesk system via email at oacops@cdlib.org and indicate "ArchivesSpace" in your subject line. When reporting technical issues with the applications, please note specific steps that you took before encountered the error — and please also note any specific error messages. This will help us track and troubleshoot the problem.