

# RecordEXPRESS

## User Guide

You can utilize RecordEXPRESS to easily create and publish collection guides in the OAC. For an example of a collection guide created through the utility, see this [guide](#). In addition, you have the option to link one or more searchable PDF documents to the collection guide, using the utility. This may be handy in cases where you have detailed listings or inventories of materials in the collection, which you'd like to have reflected in the OAC.

RecordEXPRESS is available through your [OAC Contributor Dashboard](#). Contact us at [oacops@cdlib.org](mailto:oacops@cdlib.org) if your institution needs an account to access your OAC Contributor Dashboard.

Below are instructions for using RecordEXPRESS. See also our [brief screencast \[MP4\]](#).

### Notes on the display and interface

- Data fields that have the following icon in the bottom right corner can be expanded.



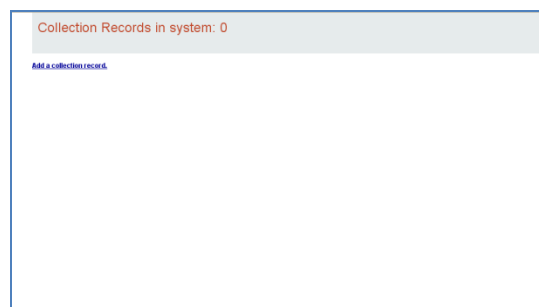
Simply click on the icon and drag the corner to expand the window.

- Use the Log out link in the upper right-hand corner to close your session, once you've finished working in RecordEXPRESS



### Creating a new collection guide

1. Log into RecordEXPRESS
2. Select **Add a Collection Record**.

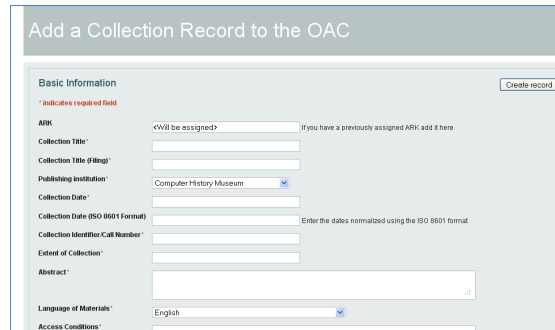


3. The “Add a Collection Record to the OAC” data entry screen contains multiple data fields, for entering basic descriptive information about your collection. Consult the **Appendix** of this document for data entry recommendations for each field. Only a small handful of fields are required.<sup>1</sup>

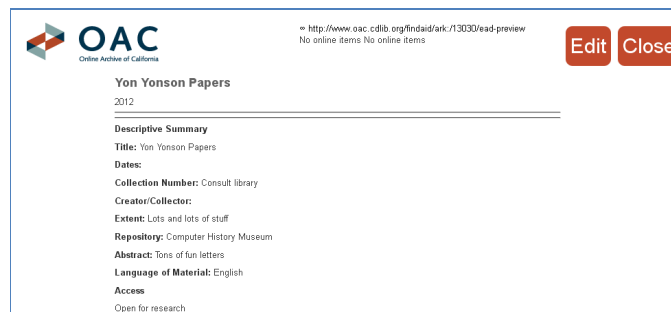
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<sup>1</sup> Required data elements are based on Describing Archives: a Content Standard (DACS)' “single-level minimum” recommendations. DACS is the US standard for archival description.

Note: if your OAC Contributor Dashboard account allows you to create records for multiple repositories within your institution, ensure that you select the appropriate name for your repository using the **Publishing institution** pull-down menu.



4. Once you've completed adding data, hit the **Create Record** button.
5. You'll be able to preview the collection guide record at this point; it will automatically be queued for publication in the OAC, and should appear online the following day.



At this point, you can do the following:

- A. Continue editing the record, by selecting the **Edit** button. You will be presented with an “Edit Collection Record” data entry screen. This will allow you to update the collection guide record and make further changes; it will also allow you to attach one or more searchable PDF documents to the collection guide. For details, see **Attaching searchable PDFs to a collection guide** in this document.
- B. Close RecordEXPRESS, by selecting the **Close** button.

Note on formatting text / cutting-and-pasting text

RecordEXPRESS does not support HTML or other markup within the data fields. Any text within the data fields should be entered as simple text characters.

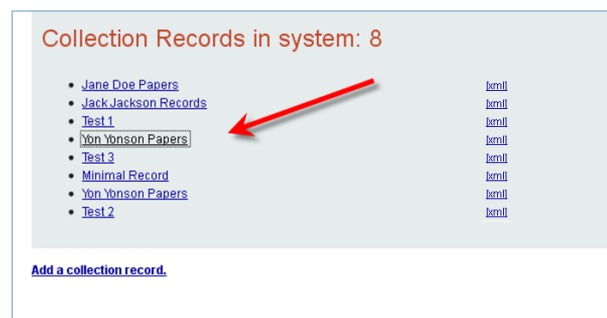
Before copying and pasting text from external documents (e.g., a Microsoft Word document), we recommend saving the external document as a simple TXT file, and replacing special characters or

formatting with plain text equivalents. Examples include characters with diacritics, symbols, smart or “hooked” single and double quotation marks, super- and subscripts, fraction signs, etc.

## Editing an existing collection guide

You can iteratively edit and update your guides at any time.

1. Log into RecordEXPRESS
2. Select the collection guide that you’d like to edit; you’ll see a list of records that you’ve already created, once you log in.



3. Select the **Edit** button. You will be presented with an “Edit Collection Record” data entry screen. This will allow you to update the collection guide record and make further changes; it will also allow you to attach one or more searchable PDF documents to the collection guide. For details, see **Attaching searchable PDFs to a collection guide** in this document.
4. Once you’ve completed adding data, hit the **Update Record** button. The resulting collection guide record will be queued for publication in the OAC, and should appear online the following day. At this point, you can do the following:
  - A. Continue editing the record, by selecting the **Edit** button.
  - B. Close RecordEXPRESS, by selecting the **Close** button.

## Attaching searchable PDFs to a collection guide

After you’ve generated a collection guide record, you can subsequently attach one or more searchable PDFs to the record.

Please note that the PDFs you attach will also be full-text searchable within the OAC—meaning they will appear in OAC search results when users hit on any words within. This only applies to PDFs that have “embedded text,” for example those that have been generated from Word documents or have been scanned using OCR. PDFs that will not be indexed are those that are simply images of the document. Not

sure about your PDF? Open it in a PDF reader. If you can copy and paste text to another document, or conduct a search using CTRL + F, it should be indexed in OAC.

Any full-text PDFs will also be indexed by search engines such as Google; hence, users may go directly from a search result in Google to the PDF in OAC. In order to ensure users have some context for the PDF, we suggest adding some preliminary information on the first page. For example: a title for the inventory/box list/container list/etc.; the name of your repository; contact information for your repository, for reference questions.

To attach one or more PDFs, select the **Edit** button:

1. Scroll down to the bottom of the “Edit Collection Record” data entry screen.
2. In the **Label** field, provide a descriptive label for the searchable PDF (e.g., “Inventory,” “Container list,” “Box list,” etc.). Hit the **Browse** button, and navigate to the PDF file on your computer. Once you’ve selected it, hit the **Upload file** button.



Under the “Supplemental Files” section of the data entry screen, you’ll see an indication of all PDF files that have been successfully uploaded.

3. Once you’ve finished uploading your files, hit the **Update Record** button. When previewing the file, note that links to any attached PDFs will not resolve to the actual files; but the links will resolve correctly once the guide is online in the OAC.
4. Close RecordEXPRESS, by selecting the **Close** button.

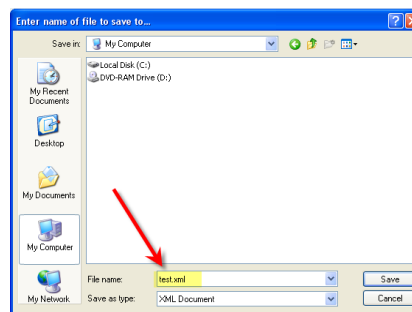
## Obtaining your collection guide in EAD format

After you’ve generated a collection guide record, you can subsequently obtain an Encoded Archival Description (EAD)-formatted version of your guide, in XML format. To access the source EAD file for a record:

1. Log into RecordEXPRESS
2. From the list of existing records that you’ve created, right-click on the [\[XML\]](#) link associated for the collection record:



3. Choose “Save Target As...” or “Save Link As...”. Provide a filename for the resulting EAD file, with a .xml extension. Save the file to a location on your workstation.



4. You will next need to make a few edits to the file, so that it's valid EAD.

Using a simple text editor (NoteTab, EditPad, etc.) or XML editor, open the EAD file. Look for the <eadid> tag, towards the very top of the EAD file. The <eadid> tag should look something like this (in lieu of #####, you'll see data that's specific to your file):

```
<eadid xmlns:cdlpath="http://www.cdlib.org/path/" countrycode="us"
  identifier="ark:/13030/#####" mainagencycode="xyz" publicid="#####"
  cdlpath:parent="ark:/13030/#####" >Consult library</eadid>
```

```
<!DOCTYPE ead PUBLIC "-//ISBN 1-931666-00-8//DTD ead.dtd (Encoded Archival Description (EAD) Version 2002)//EN" "ead.dtd">
<ead>
  <eadheader langencoding="iso639-2b" scriptencoding="iso15924" repositoryencoding="iso15511" countryencoding="iso3166-1"
dateencoding="iso8601">
    <eadid xmlns:cdlpath="http://www.cdlib.org/path/" countrycode="us" identifier="ark:/13030/kt9s2042mx"
mainagencycode="CON" publicid="Consult library" cdlpath:parent="ark:/13030/kt767nf4b2" >Consult library</eadid>
    <filedesc id="filedesc">
      <titlestmt>
        <titleproper>John S. Armstrong Nursery Collection</titleproper>
        <titleproper type="filing">Armstrong (John S.) Nursery Collection</titleproper>
        <author></author>
      </titlestmt>
      <publicationstmt>
        <publisher></publisher>
        <date>1889-1984</date>
      </publicationstmt>
    </filedesc>
  </eadheader>
  <archdesc level="collection" id="archdesc">
    <did id="did">
      <head>Descriptive Summary</head>
      <unittitle label="Title">John S. Armstrong Nursery Collection</unittitle>
      <unitdate normal="1889/1984" label="Dates"></unitdate>
      <unitid label="Collection Number" repositorycode="" countrycode="US">Consult library</unitid>
      <origination label="Creator/Collector">
```

Delete the following encoding from that tag:

xmlns:cdlpath="http://www.cdlib.org/path/"

publicid="#####"

cdlpath:parent="#####"

The result should look like this:

```
<eadid countrycode="us" identifier="ark:/13030/#####"  
  mainagencycode="xyz">Consult library</eadid>
```

## Removing collection guides from publication

To remove a record from the publication queue once successfully submitted, contact us at [ocops@cdlib.org](mailto:ocops@cdlib.org) and supply the name of the collection guide.

## Replacing collection guides with EAD files

An institution may have initially created and published a finding aid using RecordEXPRESS, then later created an EAD record with another collection management system, and would like to submit a replacement.

When a RecordEXPRESS finding aid is published, it will be assigned a unique ARK identifier, which is also used to construct the URL. We recommend the following steps in order to retain the original ARK --

this will ensure continuous usage of the URL, and that any early links or bookmarks continue to point to the finding aid.

Here's an example of an ARK URL:

<http://www.oac.cdlib.org/findaid/ark:/13030/c8z039gb>

**Before uploading and submitting the EAD files, please [contact us](#)** to let us know you would like to replace RecordEXPRESS finding aids with new EAD records. Please include the following details:

- The tool/system (e.g., ArchivesSpace, Archivists' Toolkit) you are using to create the new EAD records.
- A list of the RecordEXPRESS finding aids you will be replacing, including the URLs.
- The filename(s) you will be using for the new EAD records.

**Some other tips:**

- If there are accompanying supplemental PDFs in the RecordEXPRESS guide, these will also be removed. Please check if you need to save these files.
- If you are using ArchivesSpace: Open up the resource record in ArchivesSpace, and insert the ARK URL in the "EAD Location" field.

**Once you contact us, we will confirm the details of your request and coordinate these next steps:**

- We will delete the RecordEXPRESS entry in the OAC Administration Database, as well as any uploaded supplemental PDFs that are attached to the RecordEXPRESS entry.
- We will send a note with an update that you can upload and submit the new EAD file.

## Help? Questions?

Contact us at [oacops@cdlib.org](mailto:oacops@cdlib.org).

## Appendix: Data Entry Fields

### 1. ARK

If you have a pre-existing ARK unique identifier that you would like to assign to the collection guide record, enter it here.<sup>2</sup>

*Example:*

ark:/13030/kt5b69r976

Otherwise, leave this field blank. In this case, a new ARK unique identifier will be assigned to your collection guide once you've created the record.

To view the ARK for any collection guide, select the guide in Record*EXPRESS* and hit the **Edit** button; the ARK will be displayed at the top of the "Edit Collection Record" data entry screen.

### 2. Collection Title (required)

Provide a formal title for your collection.

*Examples:*

Mitsuye Yamada papers

Edward W. Cochems photographs

Southern California Yachting Association records

Central Records Unit records

Mary Desti collection on Isadora Duncan

### 3. Collection Title (Filing) (required)

Provide a modified form of the **Collection Title**, to promote alphabetical listing of your collection guide within 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

Chambrun (Rene de) Papers

Branch (Francis Z.) Correspondence and Papers

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<sup>2</sup> ARKs are persistent identifiers that can be minted and provided to you by the CDL; in some cases, institutions request "placeholder" ARKs for their collection guides -- before those guides are published in the OAC.



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:

Weihe, Frick & Kruse Collection

Bidwell Family Papers

Crowley Maritime Corp. Records

#### 4. Publishing Institution *(required)*

Select the name of your library, museum, or archive.

#### 5. Collection Date *(required)*

Specify the primary date or date ranges for the materials in the collection.

*Examples:*

1942-1998

(bulk 1950-1960)

ca. 1919-1949

ca. 1950

1911-

1789 Jan. 1

#### 6. Collection Date (ISO 8601 Format)

Normalize the **Collection Date** according to the [International Standard Organization \(ISO\) 8601](#) standard, using the following modified version of the [W3C date and time formats profile](#). The following format is recommended: YYYY-MM-DD, YYYY-MM, or YYYY (using 4 digits for years and hyphens between elements). For example, December 12, 1904 would be normalized as "1904-12-12" and April 1962 as "1962-04." Use a forward slash (/) to separate dates in a range, and use the fullest form of the date at each end of the range. For example, normalize August 8-24, 1986 as 1986-08-08/1986-08-24 and November 1923-March 1924 as 1923-11/1924-03.

*Examples (in bold text):*

#### **Date spans**

- Jan 1956-July 1956: **1956-01/1956-07**
- Bulk 1900-1950: **1900/1950**

#### **Open date spans**

- 1911-[ongoing]: **1911/1999** [*use an interval and set the end date to 9999*]

#### **Approximate dates** (e.g., "ca. 1950")

- ca. 1950: **1945/1955** [*normalize as an interval to express an appropriate date range*]
- 1980s: **1980/1989** [*use an interval to indicate the range of the decade*]
- 19<sup>th</sup> century: **1801/1900**

#### **Undated material**

- Undated: **1920/1957** [*normalize as an interval (as with approximate dates), perhaps using the collection dates, or life of creator, etc.*]
- Undated: ca. mid 20<sup>th</sup> century: **1935/1965** [*if a document is undated this can be stated but provide an estimate if possible; normalize as an interval, perhaps using the collection dates, or life of creator, etc.*]

### **7. Collection Identifier/Call Number (required)**

Provide a collection identifier or a call number for the collection. If you do not assign collection numbers, enter "Consult repository," "Consult library," or similar verbiage.

*Examples:*

MS-R34

MSS-00004

Consult repository

### **8. Extent of Collection (required)**

Indicate the extent, range, or physical size of the collection.

*Examples:*

33.50 linear feet (71 archives boxes and 4 oversize folders).

25 linear ft.

71 archives boxes and 4 oversize folders.

15 record cartons.

**9. Abstract (required)**

Enter a concise, summary description of the collection.

**10. Language of Materials (required)**

Select the name of most significant language represented in the collection materials.

**11. Access Conditions (required)**

Indicate any restrictions or considerations that users must take into account in order to access the collection materials -- or indicate that there are no access restrictions, if none exist.

*Examples:*

Collection open for research.

Materials stored offsite. Contact the library 24 hours in advance in order to access the materials.

**12. Publication Rights**

Indicate any conditions governing the use of the collection, once accessed.

*Examples:*

Collection open for research.

Property rights reside with the library. Literary rights are retained by the creators of the records and their heirs. For permissions to reproduce or to publish, please contact the Head of Special Collections and University Archives.

**13. Acquisition Information**

Indicate how the collection was acquired or developed.

*Examples:*

Donated by Jane Doe, 2012.

**14. Scope and Content of Collection (required)**

Provide a concise summary of the primary topical coverage of the collection, any key document types or formats of materials represented.

## 15. Biography/Administrative History

Provide a concise essay that places the materials in context by providing information about the creator(s) or collector(s).

## 16. Online Items URL

If materials comprising the collection are available in digital format, provide a URL where users can view the items. This can be a URL to digital objects on your local website.

*Examples:*

<http://digital.smpl.org/>

<http://ccdlib.libraries.claremont.edu/cdm/landingpage/collection/aot>



If the digital objects comprising the collection are already in the OAC, you can add a URL (consisting of a search result) of the objects. Below is an example of the URL format to use:

*Example:*



<http://www.oac.cdlib.org/items/ark:/13030/kt9290094p>

Supply the ARK unique identifier for the collection guide at the end of the URL (see bolded "ark:/13030/kt9290094p" above).

## 17. Creators

Indicate the name of significant persons, families, or organizations that are responsible for creating the collection. Use the  [add another](#) function to add each name; use  [remove](#) to delete a heading.

## 18. Subject Headings

Indicate significant subjects represented by the collection. Subjects include the following: topics, persons, families, organizations, geographical locations, forms/genres of materials, titles of resources, functions, and occupations. Use the  [add another](#) function to add each subject heading; use  [remove](#) to delete a heading.