



Orbis Cascade Alliance Archives & Manuscripts Collections Service

ArchivesSpace Usage Manual:

Resource Records

Produced by the Archival Collection Management Working Group of the Unique & Local Content Team

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Introduction to Resource Records

Resource Records describe archival collections. They contain all the fields necessary to make an EAD Finding Aid. You may create either single-level records or multi-level records. Single-level records describe an archive on the collection level, without breaking it down into series or other components. Multi-level records include the collection description plus hierarchical components, such as series or files. These records can be used to generate various kinds of derivative records in XML, including EAD, MARCXML and other formats.

The directions in this guide assume that you intend to export EAD from Archives Space to add to [Archives West](#) (AW). This guide will help you to create EAD that is compliant with the Alliance's EAD Best Practices. We assume that your ArchivesSpace instance has already been configured according to the Alliance's documentation.

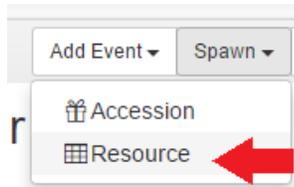
To check the relationship between fields in Archives Space and EAD elements, see the data maps linked here: <http://archivesspace.org/using-archivesspace/migration-tools-and-data-mapping#importexport>

Single-Level Resource Records

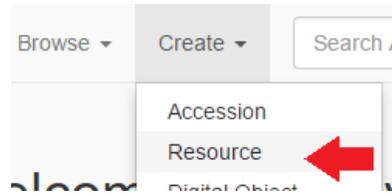
To begin creating a resource record:

1. Log into the Administrative portal of your instance of ArchivesSpace.
2. If you have access to multiple Repositories (e.g. Archives, Museum and Art Collection), be sure that you are working in the correct one.
3. Create a New Single-Level Resource Record
There are two ways to create a new resource record:

- *Spawn a Resource Record from an existing Accession Record*
Open the accession record. Click "Spawn" at upper right and select "Resource." This will create a new resource record with some fields pre-populated from the accession record.



- *OR, Create a Resource Record from scratch*
At top left, click "Create" and select "Resource." This will create a new resource record with some fields pre-populated based on your repository's default settings (see [Configuration Settings: Pre-Populating Fields](#)).



4. Fill out and save the Resource Record sections as noted below.

Basic Information

Fields required for compliance with [Describing Archives: A Content Standard](#) and/or the Alliance's [EAD Best Practices \(Version 3.9.1\)](#) are in red.

Field	Instructions	Rules
Title	Use the existing title as assigned in the Accession record or create a new title, as needed.	DACS Section 2.3
Identifier	Obtain a unique identifier for the collection according to your institution's local rules. Normally, this unique identifier will be the collection's call number. Example: MS.120 AS will create a DACS-compliant identifier that includes the country and repository code if your instance is configured according to the Alliance's documentation.	Local standards, and DACS Section 2.1
Level of description	Select the appropriate level; usually "Collection."	
Resource Type	Choose the resource type that best describes the material: <ul style="list-style-type: none"> • Collection: Material that was gathered together by a person or organization other than the one who originally created it. • Papers: A collection of material (can include non-paper items!) created by an individual or family. • Publications: Published material only, like books or DVDs. If published material is mixed with other material, use one of the other three options. • Records: Collection of material created by an office or organization in the course of regular business, e.g. "Acme University Alumni Office records." 	Related to DACS Section 2.3.19 , "Nature of the Archival Unit"
Language	Choose the language that best describes the material. Note: if more than one language is present, also use the Language of Materials note (below) to specify the additional language.	DACS Section 4.5
Publish	Check this box if the resource should appear on your ArchivesSpace public portal. Unchecking the box will suppress the Resource from the public portal, but you can still manually export EAD and publish it elsewhere.	

Restrictions	Required if restrictions on usage or access to the collection exist. Leave unchecked otherwise. Details regarding restrictions should be entered into the Notes: Conditions Regarding Access & Conditions Regarding Use, described below.	DACS Section 4.1-4.4
Repository Processing Note	Optional. Add according to your institution's practices.	Local standards

Date

Fields required for compliance with [Describing Archives: A Content Standard \(2nd Edition\)](#) and/or the Alliance's [EAD Best Practices \(Version 3.9.13.8.1\)](#) are in red.

Field	Instructions	Rules
Label	Select Creation. It is possible to add more kinds of dates to the Resource Record (such as Modified or Issued), but a Creation date must be included at minimum.	DACS Section 2.4
Expression	Optional if you fill out the Begin/End date fields. Enter the Date or Date Range.* The advantage to using this field in addition to the Begin/End fields is that you can enter free text expressions, not just normalized date integers. For example, you may enter: circa 1960 or before 1888	Free text; see DACS Section 2.4.5-2.4.6 and 2.4.15-2.4.16
Type	Select Single, Inclusive, or Range. Please note: the difference between date "range" and "inclusive" is that "range" can have either a beginning date or end date OR both a beginning and end date. "Inclusive" dates must have both a beginning AND end date. Optionally, Bulk Dates can be added in an extra date element; but at minimum, include either single or inclusive.	DACS Section 2.4.7-2.4.16
Begin	Enter the Beginning or Single date for the collection.* Use the format YYYY. This date entry must be in a "normalized" date form, for example: 1955.	Normalized dates only; see DACS Section 2.4.7-2.4.16
End	Required if applicable. Enter the End date. Use the format YYYY. This date entry must be in a "normalized" date form, for example: 1956.	Normalized dates only; see DACS Section 2.4.7-2.4.16
Certainty	Optional. This describes the level of confidence in the date. Follow your institution's best practices.	DACS Section 2.4.12, 2.4.15, 2.4.16
Era	Describe the era of your date. Default is C.E.	

Calendar	Describe the system of time. Default is Gregorian.	
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**Note regarding how to record unknown dates of creation:* According to DACS 2.4.16, “if the unit being described bears no date and the institution does not wish to or it may be misleading to record an estimated date, use *undated*.” Recommended practice for AS is to:

- (a) If possible, enter an estimated date range into the Expression field. If an estimated date would be misleading, enter “undated” in the Expression field. Either way, **also do (b) and (c):**
- (b) Enter your best estimate of the date range in the Begin/End fields, even if the date is uncertain (an entire century is a perfectly acceptable approach), **and**
- (c) Specify under “Certainty” that the date is approximate. Completing (b) and (c) indicates that the date is uncertain, but still allows for search and retrieval of the resource through date-based searches.

Extent

Fields required for compliance with [Describing Archives: A Content Standard \(2nd Edition\)](#) and/or the Alliance’s [EAD Best Practices \(Version 3.9.13.8.1\)](#) are in red.

Field	Instructions	Rules
Portion	Normally, select Whole. It is possible to add multiple extent statements describing different types of extent within the collection, such as 15 linear feet and 3 Gigabytes. If you have more than one extent statement, select “Portion” instead.	
Number	The number of units in the extent expressed only as numerals, e.g.: 11.5	
Type	Choose appropriate unit: <ul style="list-style-type: none"> ● Cubic feet or Linear Feet: Follow your local institutional practice on choosing cubic vs. linear feet. Generally this measurement is used for accessions that fill whole boxes, or which are shelved individually as whole objects, such as large art objects. For resources that will be added into a collective file cabinet or box with other collections, use one of the other options below. ● Folders: Use only if it does not fill a box on its own. ● Volumes: Use only if the entire accession consists of bound volumes that do not need boxes for shelving, such as a donation of yearbooks. If shelved in a box, use cubic feet instead. ● Items: Use only if the entire collection consists of non-foldered / non-book items. Normally these are items that will be stored inside a box with other loose items. For items that will be shelved individually, use cubic or linear feet. 	

	<ul style="list-style-type: none"> • Gigabytes: Use only for electronic collections. 	
Container Summary	<p>This is a free-text description of how much material is there. Describe the containers that are present, for example:</p> <p>1 box and 1 oversize folder</p> <p>32 boxes</p>	
Physical Details	<i>Optional.</i> Other physical details of the material.	
Dimensions	<i>Optional.</i> Dimensions of the materials described.	

Finding Aid Data

Fields required for compliance with [Describing Archives: A Content Standard \(2nd Edition\)](#) and/or the Alliance's [EAD Best Practices \(Version 3.9.13.8.1\)](#) are in red.

Note: These fields are only necessary when you are exporting EAD. This section may be skipped until you are ready to export.

Field	Instructions	Rules
EAD ID	<p>Enter the name of the EAD xml file. Name the xml file according to Archives West requirements. It should follow the format: OCLCrepositoryCode_LocalIdentifier.xml</p> <p>Examples:</p> <p>opu_ms1.xml</p> <p>opu_rg09_01.xml</p> <p>Numbers, lower and upper case letters and underscores are fine, but don't use spaces or dashes. DO NOT USE your MARC code. Your OCLC code can be found at: http://www.oclc.org/contacts/libraries.en.html</p> <p>If you have an instance hosted by the Alliance, the OCLC code will be pre-set for you.</p>	Alliance EAD Best Practices
EAD Location	<p>Enter the persistent location of the finding aid within the database. The default value is: http://archiveswest.orbiscascade.org/findaid/ark:/80444/xvXXXXX</p> <p>The characters XXXXX represent a unique Archival Resource Key (ARK) number, which is used only for that single finding aid. The XXXXX characters must be replaced with an ARK number prior to exporting the EAD. EAD files</p>	Alliance EAD Best Practices

	<p>that lack ARK numbers will not pass submission into Archives West. Get new ARK numbers at the Archives West Utility Site, following the process outlined in the Alliance EAD Best Practices. Copy and paste the full URL into this field.</p> <p>If you have an instance hosted by the Alliance, all but the last five digits will be set for you.</p>	
Finding Aid Title	<p>The (bibliographic) title for the finding aid associated with this Resource.</p> <p>Format as: Guide to the [Collection title]</p> <p>Example: Guide to the Acme University Alumni Office records</p>	
Finding Aid Subtitle	<i>Optional.</i> If applicable, add a finding aid subtitle.	
Finding Aid Filing Title	<p>This line facilitates the presentation of a list by title. Individual names should be entered in reverse order:</p> <p>Marsh (Sidney H.) papers</p> <p>Organization names are not reversed. They should be listed in the same order as in the title.</p> <p>Brotherhood of Fellows records</p>	Alliance EAD Best Practices
Finding Aid Date	Enter the year in which the finding aid was written.	DACS Section 8.1.5
Finding Aid Author	Name of person/persons who wrote the finding aid, in regular order, e.g.: Jane Doe.	DACS Section 8.1.5
Description Rules	<p>Normally, select from the drop-down list: “Describing Archives: A Content Standard (DACS)”.</p> <p>If you have an instance hosted by the Alliance, this will be pre-set for you.</p>	DACS Section 8.1.4
Language of Description	If you have an instance hosted by the Alliance, this will be pre-set to “Finding aid written in English.”	Alliance EAD Best Practices
Sponsor	<i>Optional.</i> This field is where grant or other special funding can be acknowledged.	
Edition Statement	<i>Optional.</i> Add information about the edition of the finding aid.	
Series Statement	<i>Optional.</i> Indicate any bibliographic series to which the finding aid belongs.	

Finding Aid Status	<i>Optional:</i> Select “Completed” from the drop-down list when the finding aid is done.	
Finding Aid Note	<i>Optional.</i> For any other information not covered by the other finding aid data elements.	

Revision Statements

Field	Instructions	Rules
Revision Date	<i>Optional.</i> Use this field only if the Finding Aid has been revised after initial encoding/export.	Alliance EAD Best Practices
Revision Description	<i>Optional.</i> Enter if applicable: Finding aid revised.	

Related Accessions

Link related accessions through the lookup menu. If the resource was spawned through an accession, this will already be populated. Links may be made to multiple accessions as needed.

Agent Links

Add as many Agent Links as appropriate.

Note: Add at least one “Creator” if possible. When creators are known, DACS requires you to enter them.

Field	Instructions	Rules
Role	Select the function (creator, source, subject) of the Agent in relation to material in the collection.	See Agents Regarding Creators, see: DACS Section 2.6
Relator	<i>Optional.</i> Specifies the role of the agent. Choose from the drop-down menu.	Relator terms: MARC relators list
Agents	Select an existing Agent record, if possible. If not: Create > [Choose appropriate type]; then follow directions for Agents	

Subjects

Add as many Subjects as appropriate.

To comply with the [Alliance's EAD Best Practices](#), include at least one Archives West browsing term.

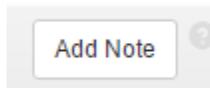
If you have an instance hosted by the Alliance, these will be loaded for you.

Field	Instructions	Rules
Subjects	Select an existing Subject record, if possible. If not: Click Create then follow directions for Subjects.	See Subjects

Notes (Scope & Contents, Abstract, etc.)

The Notes Section includes the Scope and Contents Note, Abstract Note, and other fields about the collection. To add each Note:

1. Click on the "Add note " button



2. Select the Type of note that you are adding (e.g. Scope and Contents)
3. Persistent IDs field: entries in this field will be automatically created when the resource record is saved. There is no need to enter them manually.
4. Label: Unless otherwise noted, the "Label" field should match the Note field name, or be left blank.
5. Publish: Check this box by default. Unchecking it will suppress the note from the public view of the Resource Record in ArchivesSpace.
6. Text / Content: Follow instructions for each Note Type, below.

The Note Types that must be added to conform with the Alliance's EAD Best Practices are listed in red below.

Many other note types are available and may be used as needed.

Note Type	Label & Text/Content fields <i>(see above for more instructions)</i>	Rules
Biographical/Historical Note	Label: Biographical Note (when describing an individual) or Historical Note (when describing a group or institution). Content: Provide information about the individual(s) or institution that created the collection according to DACS.	DACs Section 2.7
Scope and Contents	Label: Scope and Content Note	DACs Section 3.1

	Content: Describe the nature of the materials in the collection and the activities that created them according to DACS.	
Abstract	Provide a brief summary of the collection that includes something about the content and who generated the collection. Hint: A good summary can often be created by using the first sentence of the Biographical/Historical Note and the first sentence of the Scope and Contents Note.	
Conditions Governing Access	Change default text if applicable. This field refers to physical or technical restrictions on accessing the collection. The default text is: "Collection is open for research." You may also add these optional fields, if applicable: Restriction begin/end dates: <i>Optional</i> . Local access restriction type: <i>Optional</i> .	DACs Section 4.1.-4.3
Language of Material	<i>Use only if more than one language is present in the collection. Otherwise, the Language entry that has already been filled out in the Basic Information section is sufficient.</i> If you would like to avoid post-export cleanup, use one of the following patterns for the text: Collection is in [primary language--what you already entered in Basic Information]and [additional language]. Collection is in [primary language--what you already entered in Basic Information], [second language], and [third language]. Additional languages:[second language], and [third language]. Additional languages: [second language], [third language], and [fourth language].	DACs Section 4.5

External Documents

Optional

If applicable, use the title, location, and publish fields to include any external documents that should be associated with the resource. Examples of external documents: PDFs of scanned finding aids, donor files, processing files, etc.

Rights Statements

Leave blank unless required by local standards

To record copyright statements about the collection for public access purposes, the “Notes: Conditions Regarding Use” field is preferred. This section provides more options for recording various types of rights statements, such as Intellectual Property (i.e. copyright) or Licensing information. The field structure is based on PREMIS metadata. Please note that the Rights Statements section currently does not export as EAD, and is not used in the Archives West portal. Therefore any entries in this section will be available for internal AS users only.

Instances: Containers and Locations

Archives Space uses Containers and Locations to track physical containers (i.e. boxes and folders) and their physical locations. Do not confuse this section with the collection’s Extent. While the Extent field tracks the overall size of the collection, “Instances” tracks actual, physical boxes in your collection, and/or the size and location of digital files. It enables functions related to finding shelf locations, tracking space on your shelves, and so on. Adding Containers and Locations is optional.

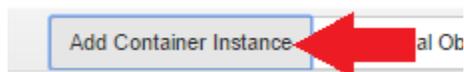
Note that adding Containers at the collection level will *not* create a Box-and-Folder list in your finding aid. To create a Box-and-Folder list, you will need to add Containers to the series or file levels of your collections. For this option, see the directions under Multi-Level Resource Records, below. For more information on the underlying principles for how this section works, see [Containers & Locations](#).

To add Containers/Locations at the Collection Level

IMPORTANT: If you are going to add Containers to the Series or File levels of this collection, do not add Containers to the collection level. Instead, see the directions under Multi-Level Resource Records, below.

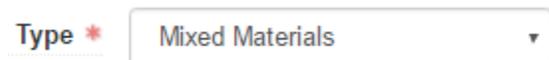
1. Click on “Add Instance.”

Note: You may add multiple Instances in order to account for multiple Containers.



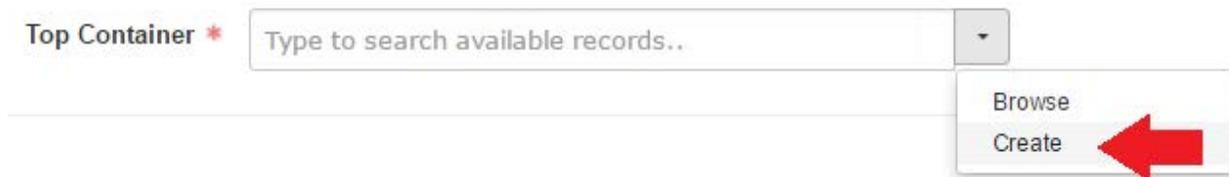
2. Select Type = Mixed Materials

Note: this is a good default choice for archival materials in general. Optionally, you may select one of the other types if the entire container is made up of that material type; for example: Audio.



3. Select or Create a Top Container

Top Containers are usually Boxes, but may sometimes be Frames, Objects, etc. When adding instances to Collection-level records, normally you will be creating new Top Containers. Select “Create” from the dropdown arrow:



This will open the “Create Top Container” pane:

Container Profile

Container Type	Box
Indicator *	1
Barcode	

Barcode length for this repository: 0-255 characters

- Container Profile: *Leave blank* unless otherwise instructed by your Institution
- Container Type: Usually this is “Box”, but may be “Frame”, “Object”, etc.
- Indicator: Normally, enter a single integer such as 1, 2, 3, 4, etc.
You *can* enter ranges of box numbers, e.g. 1-5, 6-8, etc. However, keep in mind that ArchivesSpace will regard whatever you enter as one single top-level container. This may not always work smoothly with the Locations and space calculations tools. See [Adding Sets of Boxes](#) for more details.
- Barcode: Optional. Use if required by your institution.
- ILS fields: *Leave blank* unless otherwise instructed by your Institution.

4. Optionally, add a Location

Within the “Create/Edit Top Container” pane, click “Add Location” and then Browse to an appropriate location. Note: normally, all possible Locations (e.g. all possible buildings, rooms, and shelving locations) should be set up in advance by your Systems Administrator. You can also apply Locations in bulk later, using the Manage Top Containers tool. See: [Bulk Management of Top Containers](#)

Locations Add Location

Status *	Current	<input type="button" value="x"/>
Start Date *	2017-01-03	<input type="button" value="Calendar"/>
End Date		<input type="button" value="Calendar"/>
Note	<input type="text"/>	
Location *	<input type="text" value="Type to search available records.."/>	

+

Find with Space Calculator

Browse

Create

5. *Normally leave blank* the Child and Grandchild fields.
Under most circumstances, you will not use these fields when adding containers to a Collection-Level record. These normally apply to lower-level components such as Series or File. See directions under Multi-Level Resource Records.

Instances: Digital Objects

Optional.

ArchivesSpace uses this section to link Resource Records to associated Digital Objects. For example, if you had digitized an audio recording from within a collection, you could link its Digital Object record to that collection's Resource Record.

The result in the EAD export will be links at the component level (e.g. a file-level description to a digitized file, an item-level description to an item). To add component-level links, see the directions for [Digital Objects](#).

If you wish to do collection-level linking to a group of digital objects, follow the instructions in the [Alliance's EAD Best Practices](#).

Other Sections (Collection Management, Deaccessions, etc.)

Optional

If applicable, fill out information according to your institution's practices.

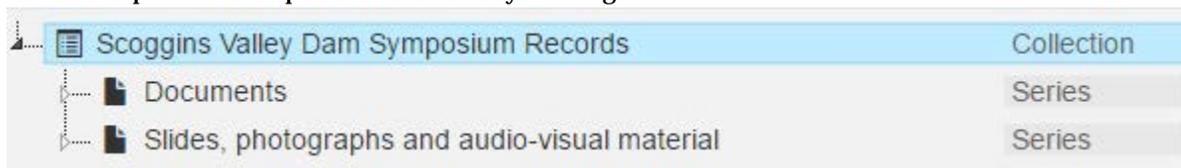
Multi-Level Resource Records

Introduction

Multi-Level Resource Records include all of the information in a Single-Level Resource Record, plus information about lower-level components of the resource, such as series, subseries, and files. If you want to include a structured box-and-folder list in the EAD finding aid for a collection, you will need to add these components. **Multi-level resource records are not required by the [Alliance's EAD Best Practices](#).**

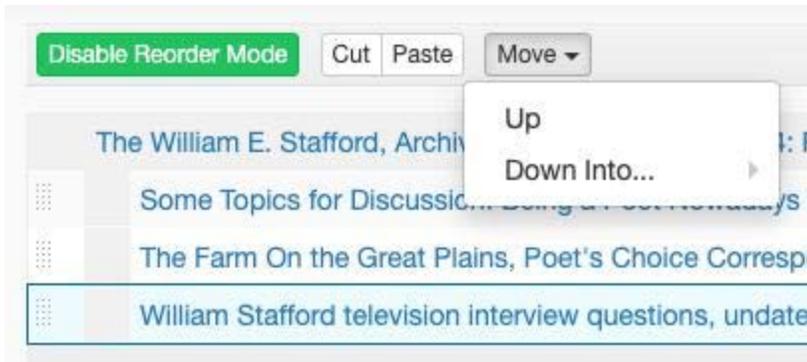
Some general notes about Multi-Level Resource Records in ArchivesSpace:

- **AS displays your components in a “tree” at the top of your record.**
You can expand or collapse each element by clicking on it.

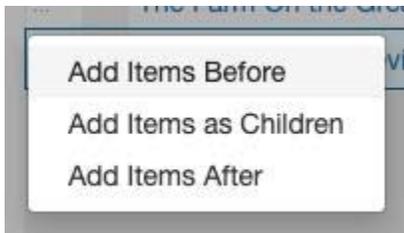


- **Each component can have “Sibling” or “Child” relationships to other components.**
In the image above, the “Documents” Series is the child of the Scoggins Valley Dam Collection. The “Slides” Series is the sibling of the “Documents” Series.
To add a new component, you select an existing component and then add a sibling or child.
- **You can create hierarchies of components to whatever level of complexity is needed.**
For example, you could choose just to add series-level components; or you could add series with sub-series, and with files under that, down to many sub-levels of organization. See [DACS Chapter 1](#) for general notes on hierarchical arrangement and description.
- **If a component is in the wrong place:**
Enable Reorder Mode: drag-and-drop the entry or use the “Move” or “Cut/Paste” buttons to change its location in the hierarchy. “Move”- “Down Into” will create a child element. “Move” - “Up/Down” will retain the same level.





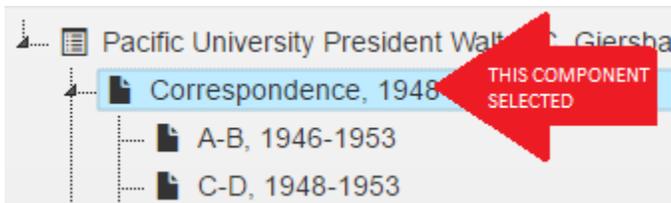
- To reorder items by dragging, click and drag one or multiple items, and follow the prompt for placement “Before”, “After”, or as “Child” element.



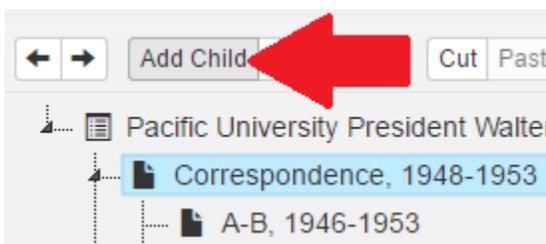
- “Disable Reorder Mode” to save changes and return to normal editing screen.

Entering Child & Sibling Elements one at a time

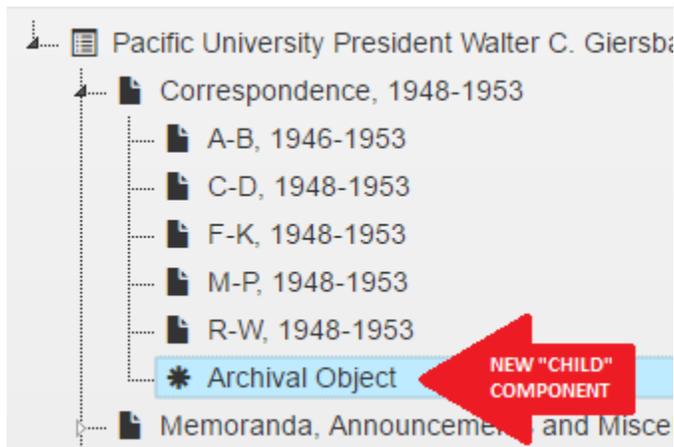
1. In the component tree at the top of the Resource Record, select one component to which you want to add a “Child” or “Sibling” component.



2. Click the Add Child or Add Sibling button, as appropriate.

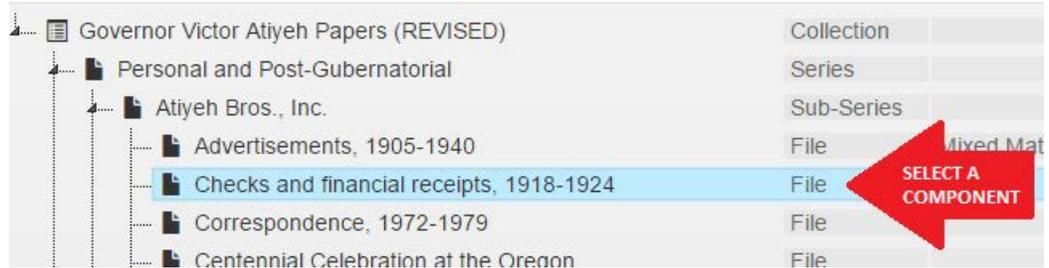


3. A new component with the temporary title “Archival Object” will be created as either the Child or Sibling of the element you first selected:

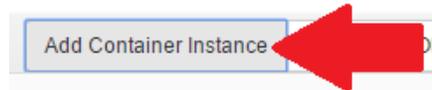


4. **You can now enter metadata about the component within the fields in the main information pane of ArchivesSpace.** Be sure to click “Save” when done entering metadata, before clicking away to another component in the tree.
 - At a minimum, the component must contain the **Level of Description element** and a **Title and/or Date**.
 - Optionally, additional component elements may be filled out the same manner as they would at the Collection level: See the instructions for Single-Level Resource Records for more detail.
 - For a cleaner display of your components in the finished finding aid, avoid adding “Notes” to lower-level components except when absolutely necessary.
 - It is undesirable to repeat information recorded at higher levels of description. Information that is common to the component parts should be provided at the highest appropriate level. Only metadata that differentiates a child from its parent (e.g. a different date range, a different title, etc.) should be added to the child element.

5. **To include a Box-and-Folder List in your finding aid,** you will need to add an “Instance” to each relevant component. See [Containers & Locations](#) for the principles of how this function works. Some general rules are included on this page, but your local institution may wish to modify these to fit local standards and practices.
 - a. Select a Component from your Hierarchy Tree
Note: Usually, you should add containers to a consistent component level within the hierarchy tree of the collection. For example, add instances to the Series *or* the File-level elements, but not both. A good general rule is to add instances to the lowest-level elements in your collection.



b. Go to the Instances section for that Component and add a Container Instance:



c. Select Type = Mixed Materials

Type *

Note: this is a good default choice for archival materials in general. Optionally, you may select one of the other types if the entire component is made up of that material type.

d. Enter the Box/Folder/etc. information

Instructions for AS v. 1.5+:

1. Choose or Create a Top Container.

Top Container *

Normally, your “Top Container” will be the Box in which your object is housed. If you have already created a Top Container elsewhere in this particular collection (like if you are recording the 5th folder within Box 1), then Browse to the existing container. If you are creating a new Top Container, open the “Create” panel and fill out the fields below. The directions here are rules of thumb; for general principles, see [Containers & Locations](#).

- Container Profile = Leave blank unless your institution instructs otherwise
- **Container Type** = Normally choose Box; or other type if appropriate
- **Container Indicator** = [enter the number of the physical Box or other container, for example: 3]
- Barcode & ILS fields = Leave blank unless your institution instructs otherwise
- Location = Use only if instructed by your institution. Within the “Create/Edit Top Container” pane, click “Add Location” and then Browse to an appropriate location. Note: normally, all possible Locations (e.g. all possible buildings, rooms and shelving locations) should be set up in advance by your Systems Administrator. You can also apply Locations in bulk later, using the Manage

Top Containers tool. See: Bulk Management of Top Containers

2. *Optionally*, fill out Container Child & Grandchild fields.

The Child and Grandchild components describe containers inside your Top Level Container. For example, if the Top Level Container is a Box, the Child might be a Folder. If entered, common entries are:

- Child Container Type = [most often, choose Folder]
- Child Container Indicator = [enter the number(s) of the physical folder or other container, for example: 31-33]
- Container 3 Type / Indicator: rarely used; normally leave these blank

Tips:

- For the cleanest display of your box-and-folder list in the finding aid, be as consistent as possible in choosing the same Container Type for each item within a series. Every time you switch types (between, for example, “Box” vs. “Boxes”), the finding aid will display a new row with that column header in it, which can be distracting to users.
- Multiple items can be housed in the same physical box, so it is perfectly valid for multiple components to have identical entries in the Top Container / Container 1 Indicator field.
- DO NOT restart your box numbers from “1” every time you begin a new series. In other words, if you began Series A with Box 1-5, do not start over numbering Series B with Box 1-5. Instead, continue Series B with Box 6-10. *Different physical top-level containers should have different container numbers in AS.* See [Containers & Locations](#).

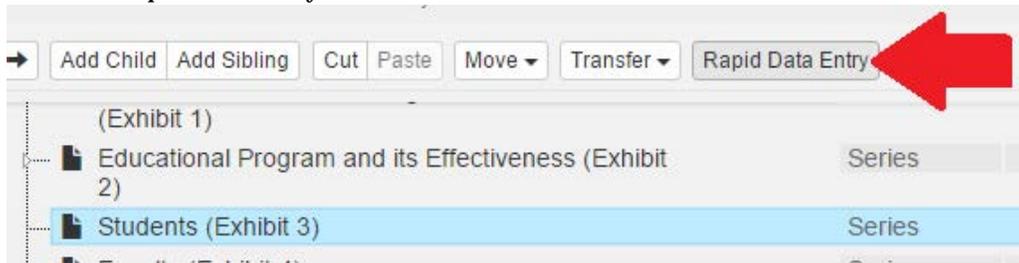
Entering Child Elements through Rapid Data Entry

If you are entering a large number of components to a Multi-Level Resource Record, the Rapid Data Entry (RDE) tool can be useful for minimizing typing and mouse clicks. You can, for example, enter a long list of files under a particular series much more quickly than if you entered them one-by-one. The basic directions for how to fill out fields is the same as in the directions for “Entering Child & Sibling Elements one at a time,” above. These steps provide a quick reference for how to complete them using RDE.

1. In the component tree at the top of the Resource Record, select one component to which you want to add a set of “Child” components.



2. Click the Rapid Data Entry button



3. In the Rapid Data Entry pane that opens, enter one Child element per row

Instance	Basic Information		Date				Basic Information
Indicator	Child In	Title	Date Type	Label	Begin	End	* Level of Description
✓ 2	1	Aardvark-Beetle	Inclu	Crea	1935	1970	File
✓ 2	2	Buzzard-Cat	Inclu	Crea	1938	1968	File
✓ 2	3	Caterpillar-Deer	Inclu	Crea	1920	1980	File
✓ 2	4	Elephant-Gorilla	Inclu	Crea	1934	1976	File

Example of data entry in a customized RDE pane, showing four files in Box 2: folders 1-4

You may either use the RDE columns as-is or create a RDE template (see below) to enable even faster data entry. ArchivesSpace includes tips for using the RDE tool at the bottom of the pane. Of particular note are the **Sticky Columns** option, which tells AS to repeat the contents of the previous row; and **Fill Column - Sequence** which tells AS to fill out a column with an alphanumeric sequence. Note: At a minimum, each component must contain the **Level of Description element** and a **Title and/or Date**.

Recommended minimum entries:

Basic Information	Instance	Basic Information	Date			
* Level of Description	Title	Date Type	Label	Begin	End	Publish?
✓ File	File A title	Inclusive Dates	Creation	1935	1970	✓
✓ File	File B title	Inclusive Dates	Creation	1938	1968	✓
✓ File	File C title	Inclusive Dates	Creation	1920	1980	✓
✓ File	File C title	Inclusive Dates	Creation	1934	1976	✓

- Level of Description (**sticky**) = Choose the appropriate level
- Title = Enter a title for the component, e.g.: Correspondence
- Date / Type = Select Single or Inclusive Dates
- Date / Label (**sticky**) = Creation

Date / Begin and End = Enter the beginning and end years in YYYY format. (If it is a single date, enter only the Begin date)

Publish? (sticky) = Check

Recommended additional entries to create a Box-and-Folder List:

Instance Type	Container Type	Indicator	Child Type	Child Indicator
Mixed Material	Box	2	Folder	1
Mixed Material	Box	2	Folder	2
Mixed Material	Box	2	Folder	3
Mixed Material	Box	2	Folder	4

If you are including a Box and Folder List (see [Containers & Locations](#) for more information):

Instance Type (sticky) = Mixed Media or other if appropriate, but this is a good default

Container 1 Type (sticky) = Box (or other container if appropriate)

Container 1 Indicator = Enter the component's Box number, e.g.: 1

Container 2 (or Child) Type (sticky) = Folder, or other container if appropriate

Container 2 (or Child) Indicator = Enter the component's Folder number, e.g.: 3

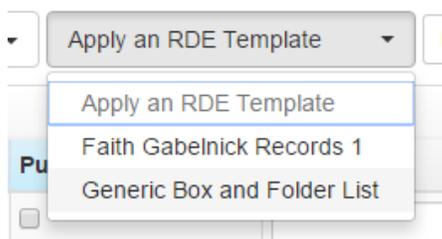
When you are done entering rows, click "Save Rows."

Please note that AS does not save your work until you click Save Rows and exit the RDE screen.

It's safest to only enter 10-15 archival objects at a time to ensure you don't lose your work. Also, while you can add components in bulk using the RDE tool, the RDE tool does *not* have a bulk editing function, so be sure that your entries are correct before saving!

4. To Apply or Customize a Template to the Rapid Data Entry Pane

You may "Apply an RDE Template" by clicking on the button. This will apply pre-set preferences:

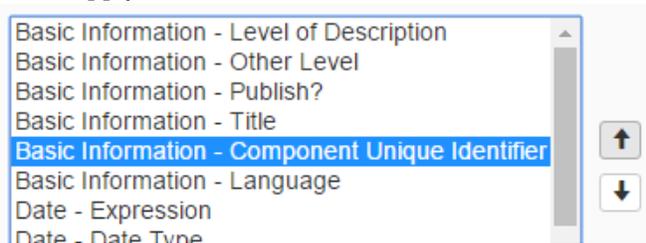


Users with Manager or System Administrator permissions can create and share RDE templates across repositories:

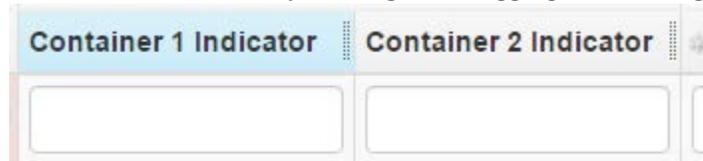
- Use the “Columns” button and check each column you wish to make visible:



- Use the “Reorder Columns” button to move the columns into your desired order, then click “Apply Column Order”:



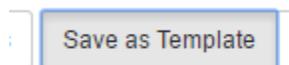
- Click on (highlight as blue) any column you wish to be “Sticky” -- that is, any column where you want the contents of one row to repeat itself in the next row. If desired, change the widths of the rows by clicking and dragging on their edges.



- *Optionally*, in any column you’ve highlighted as sticky, type in or select a default value.



- Click the Save as Template button:



The template should now be available to you the next time you want to use the RDE tool.