

# ArchivesSpace Specification for added Location Management functionality

*v 2.1, New York University Libraries, January 2016*

The purpose of this document is to describe six features to be added to ArchivesSpace that will make it an even more effective tool for assigning location, identifying spaces where materials can be shelved and planning for collection growth. This functionality has been specified and will be paid for by New York University. It will be contributed to the core code of the application so all users can benefit from it. As noted below, the added functionality described here will be optional. No users will have to use the new fields nor will any migration process be necessary.

## Notes:

- The features described below are optional – ArchivesSpace users will not be required to use any of these added functions. The current data model and functionality will be retained.
- Figures are rough wireframes included to illustrate functionality described. During final design and development, look and feel and final details may be polished and functionality achieved in alternate ways if approved by NYU.
- Elements indicated as NEW VIEW are new pages that will be part of the ArchivesSpace staff user interface. Elements indicated as UPDATED VIEW are existing pages within the application where there be some modification(s).

## Feature 1. Location Profile

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### Scope / Purpose

This feature should allow archivists to assign and update dimension and/or capacity information about locations via creation of a new object in the data model, 'Location Profile' that operates similarly to container profiles. Location profile information is optional to record and is only visible on the staff interface.

### Location Profile data elements table

Element	Definition	Type	Default values	Required	Example value
Name	Name for the type of location	String (must be unique)	-	Yes	Standard archival shelf
Dimension units		Configurable list	Centimeters, Feet, Inches, Meters, Millimeters, Yards	No	Inches
Depth		Decimal	-	No	33
Width		Decimal	-	No	69
Height		Decimal	-	No	12

Like Locations, Location Profiles should be global to an ArchivesSpace instance, i.e. not repository specific.

### Views and supported task sequences

#### NEW VIEW - Create New Location Profile form

1. Archivists must be able to create or edit a Location Profile via a New Location Profile form - see rough wireframe in Figure A. This form is very similar to the New Container Profile form.
2. Users can save the new Location Profile or Cancel.

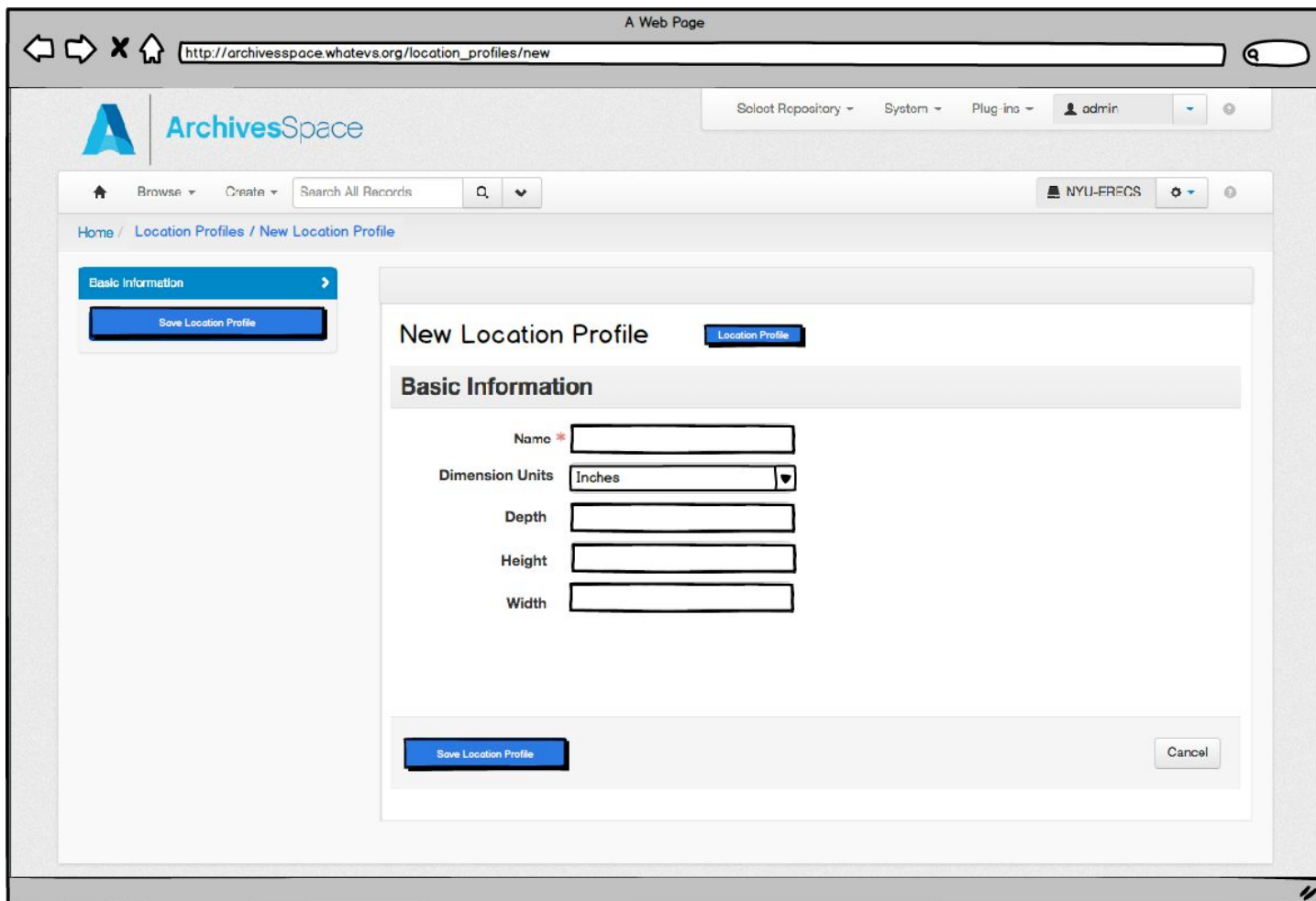


Figure A, Rough wireframe of New Location Profile form

### NEW VIEW - Edit / Delete a Location Profile form

1. Archivists must be able to edit or delete a Location Profile via a form similar to the Edit Container Profile form – see rough wireframe in Figure B.
2. If a user chooses to delete a Location Profile, a warning will appear asking for confirmation. Deleting a Location Profile should only delete that Profile, not any associated locations or containers.

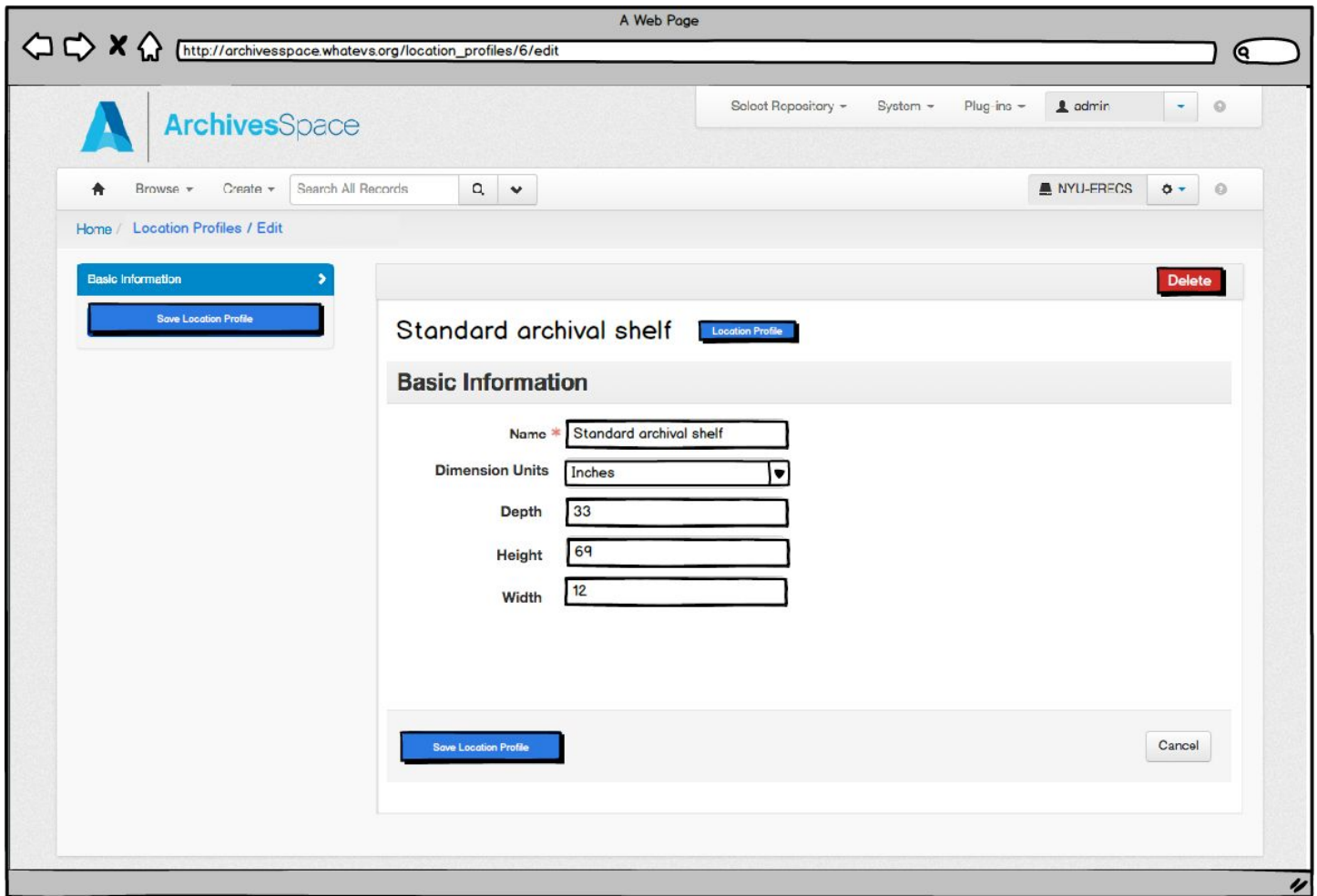


Figure B – Rough Wireframe of Location Profile Screen with Delete Function

### UPDATED VIEW - Assign Location Profile to a Location Record

Location Record must include a new field “Location Profile” that is similar to “Container Profile” field on Top Container records. When a user types in the field, a dynamic search should be executed for Location Profiles matching the user’s query. There is also a downward arrow at the end of the box that gives archivist the choice to “Browse” or “Create” Location Profiles.

Selecting “Browse” opens up a pop-up that allows archivist to select a Location Profile and link it to the Location. Selecting “Create” open up a pop-up that allows the user to Create a new Location Profile. Both of these pop-ups are analogous to “Container Profile” field functionality.

### NEW VIEW - Manage Location Profiles

Either main ‘Browse’ or ‘System’ drop-downs must include a new option to ‘Manage Location Profiles’ - see Figure C. Functionality on the ‘Manage Location Profiles’ view is largely similar to the ‘Manage Container Profiles’ view. Facets on the left should be ordered by increasing size.

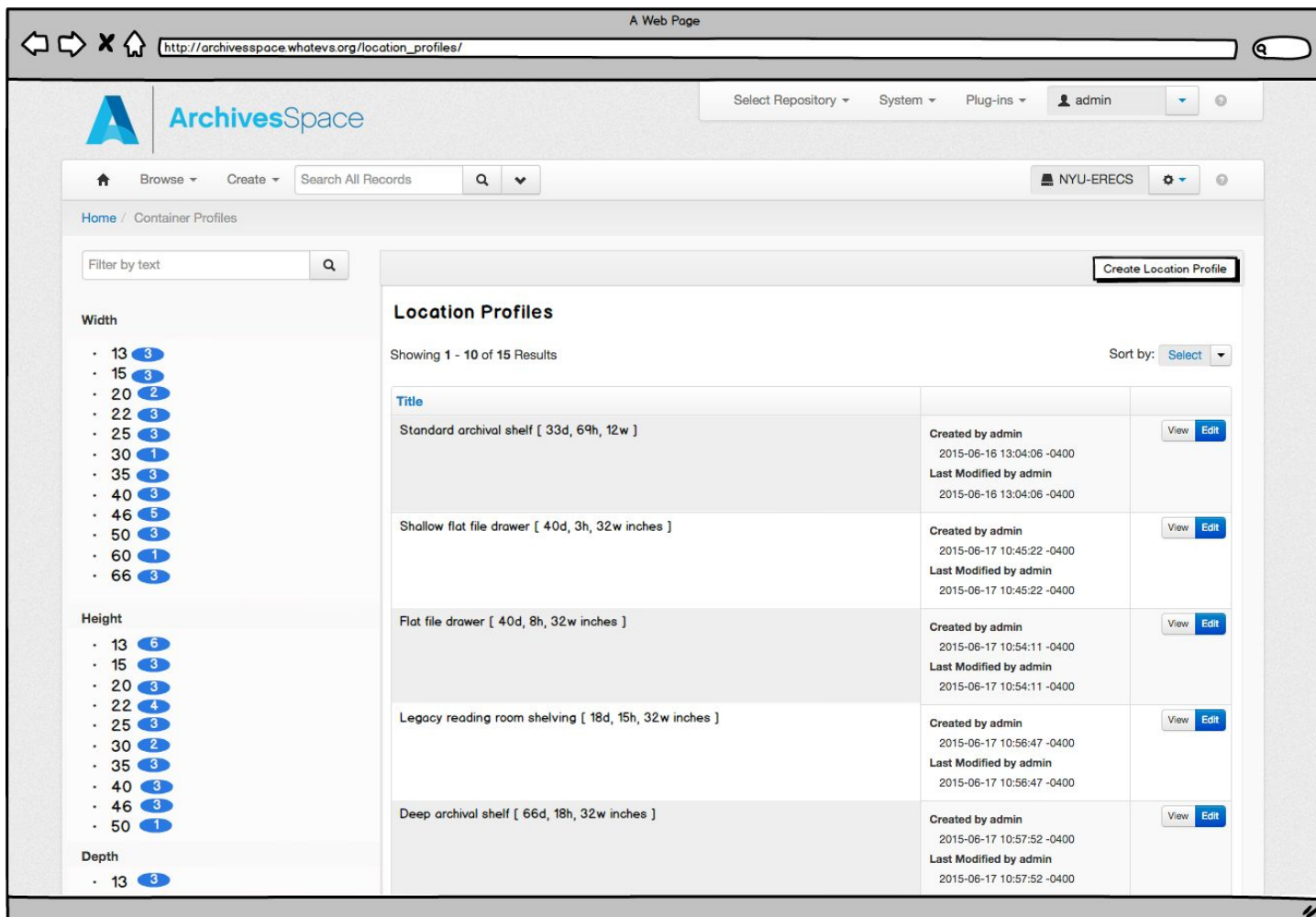


Figure C – Rough Wireframe of Manage Location Profile Screen

## UPDATED VIEW - Browse Locations

The 'Browse Locations' view should include an additional column displaying Location Profile.

### Business rules - CRUD Privileges for Authenticated Users

- Only System Administrators can create/edit/delete/assign location profiles. The options to Manage Location Profiles and Create Location Profiles are only visible to System Administrators. Location profiles will normally be applied once and do not change often or at all.
- All staff users can view individual Location Profiles via the larger ArchivesSpace 'View Records' permission. On the user interface, Location Profiles would be accessed via selected the Location Profile from Location record.

## Feature 2. Location capacity and empty spaces calculator

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### Scope / Purpose

This feature should allow archivists to identify what Locations have empty spaces so they can see where they may be able to shelve new or moved material.

### Views and supported task sequences

Implemented as a view within the interface, similar to the Extent Calculator.

#### **NEW VIEW:**

This feature must calculate what spaces are empty and present a screen displaying empty spaces – mockup below. If possible, column 4 should be configurable to display lists for any given container profile. The given Container Profile can be selected in the view via a search box labeled ‘View spaces available for a given Container Profile’ or similar. Columns should be sortable and able to be filtered.

<b>Location with available space</b>	<b>Repository owner (if applicable)</b>	<b>Total space available</b>	<b>Number of [Container Profile] that can be shelved here</b>
Bobst, 10, Tamiment, East Wing [Aisle: 16, Bay: E, Shelf: 1]	Tamiment Library & Wagner Labor Archives	W 26", D 20", H 15"	4

## Feature 3. Printable shelf list by location

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### Scope / Purpose

Download a printable shelf list report by a specific Location or Location range (e.g. What are all of the containers at Building = Cooper? What are all of the containers located in Row 4, Bay 2, Shelf 1 of 10 West?). Report will output one line of data for each Top Container.

### Views and supported task sequences

- User goes to the reports view and has the option to download a 'Holdings by Location' report in CSV at minimum; TSV and PDF as well if possible
- OR User goes to the Location browse view and there's an button that allow for download of a report (similar to export functionality associated with resource records)
- The user can choose to export only data for a particular Building

Building	Floor and Room	Location in Room	Location Profile	Resource or Accession ID (call no)	Resource or Accession Title	Top Container indicator	Container profile	Repository
Bobst,	10, Tamiment,	East Wing [Aisle: 16, Bay: E, Shelf: 1]	Standard Archival Shelf	AIA.059	Margaret Callaghan Papers	1	Record Carton	TamWag
Bobst,	10, Tamiment,	East Wing [Aisle: 16, Bay: E, Shelf: 1]	Standard Archival Shelf	AIA.059	Margaret Callaghan Papers	2	Record Carton	TamWag

## Feature 4. Printable shelf list by Repository

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### Scope / Purpose

Download a printable shelf list report by a specific Repository (e.g. Where are all of Tamiment's collections?). Report will output one line of data for each Top Container.

### Views and supported task sequences

- User goes to the reports view and have the option to download a 'Holdings by Repository report in CSV at minimum; TSV and PDF as well if possible
- OR User goes to the Location browse view and there's an button that allow for download of a report (similar to export functionality associated with resource records)
- The user can choose to export only data for a particular Repository.

Building	Floor and Room	Location in Room	Location Profile	Resource or Accession ID (call no)	Resource or Accession Title	Top Container indicator	Container profile	Repository
Bobst,	10, Tamiment,	East Wing [Aisle: 16, Bay: E, Shelf: 1]	Standard Archival Shelf	AIA.059	Margaret Callaghan Papers	1	Record Carton	TamWag
Bobst,	10, Tamiment,	East Wing [Aisle: 16, Bay: E, Shelf: 1]	Standard Archival Shelf	AIA.059	Margaret Callaghan Papers	2	Record Carton	TamWag

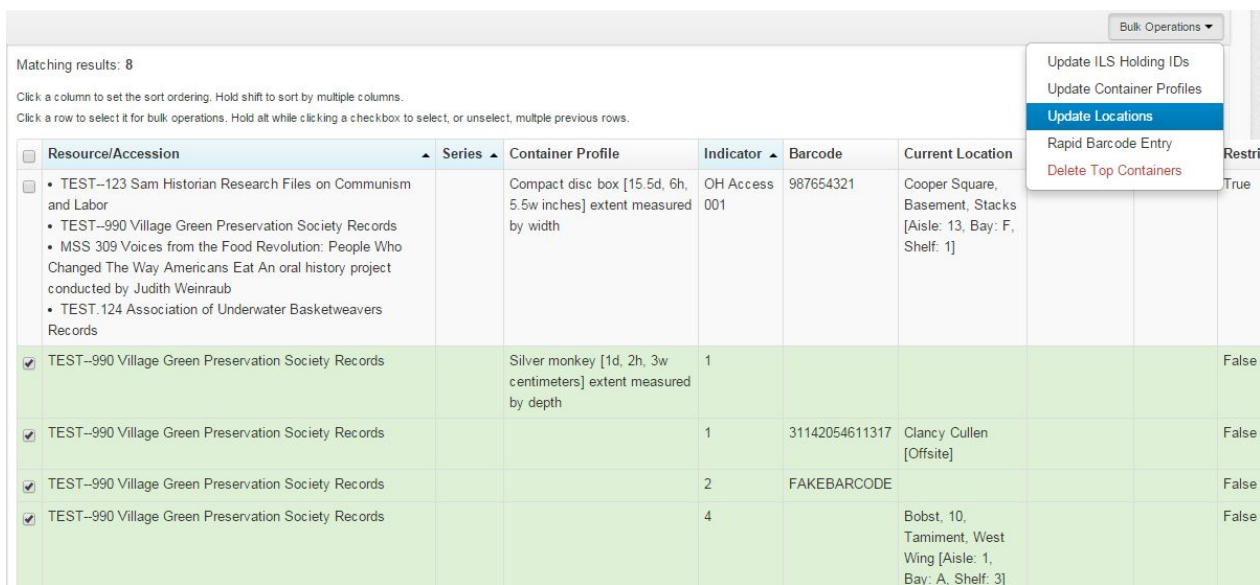


## Feature 5. Batch assign multiple locations to multiple boxes in a single form

### Scope and Purpose:

ArchivesSpace allows for archivists to assign or update location information through an operation executed at the individual container level or a batch operation that applies a single location for multiple containers. ArchivesSpace does not currently allow for archivists to batch assign or update multiple containers in a single operation to more than one location (either consecutive or non-consecutive), which this proposed feature would allow. At this stage, a different operation is necessary for every distinct location. For large collections with many containers and/or for repositories implementing granular levels in their location management, performing so many individual operations is time-consuming, cumbersome, and likely to increase errors in overall container-level location management.

The bulk operation as it currently exists works as follows: after bringing up a list of containers, a user selects the specific containers to be updated, then selects “Update Locations” from the Bulk Operations drop-down (see Figure D below):



Matching results: 8

Click a column to set the sort ordering. Hold shift to sort by multiple columns.  
Click a row to select it for bulk operations. Hold alt while clicking a checkbox to select, or unselect, multiple previous rows.

<input type="checkbox"/>	Resource/Accession	Series	Container Profile	Indicator	Barcode	Current Location	Restrict
<input type="checkbox"/>	<ul style="list-style-type: none"><li>TEST--123 Sam Historian Research Files on Communism and Labor</li><li>TEST--990 Village Green Preservation Society Records</li><li>MSS 309 Voices from the Food Revolution: People Who Changed The Way Americans Eat An oral history project conducted by Judith Weinraub</li><li>TEST. 124 Association of Underwater Basketweavers Records</li></ul>		Compact disc box [15.5d, 6h, 5.5w inches] extent measured by width	OH Access 001	987654321	Cooper Square, Basement, Stacks [Aisle: 13, Bay: F, Shelf: 1]	True
<input checked="" type="checkbox"/>	TEST--990 Village Green Preservation Society Records		Silver monkey [1d, 2h, 3w centimeters] extent measured by depth	1			False
<input checked="" type="checkbox"/>	TEST--990 Village Green Preservation Society Records			1	31142054611317	Clancy Cullen [Offsite]	False
<input checked="" type="checkbox"/>	TEST--990 Village Green Preservation Society Records			2	FAKEBARCODE		False
<input checked="" type="checkbox"/>	TEST--990 Village Green Preservation Society Records			4		Bobst, 10, Tamiment, West Wing [Aisle: 1, Bay: A, Shelf: 3]	False

Bulk Operations

- Update ILS Holding IDs
- Update Container Profiles
- Update Locations**
- Rapid Barcode Entry
- Delete Top Containers

Figure D – Screenshot of As-Is ArchivesSpace Method for Bulk Assignment of of Multiple Containers to a Single Location (Pt. I)

The user assigns a new location that will be applied to the selected containers (see Figure E below):

## Update Locations

Choose a Location for all selected containers.

- TEST--990, Container 1, Silver monkey
- TEST--990, Container 1 [31142054611317]
- TEST--990, Container 2 [FAKEBARCODE]
- TEST--990, Container 4
- TEST--990, Container 5
- TEST--990, Container 6
- TEST--990, Container 8, Hollinger (full)

Location

Figure E – Screenshot of As-Is ArchivesSpace Method for Bulk Assignment of of Multiple Containers to a Single Location (Pt. I)

Examples of this scenario include:

1. A 50-box collection has been processed, needs to be shelved in the stacks, and have its location information documented. The boxes are shelved consecutively in the Cage Aisle 9 starting with Bay A Shelf 1 through Bay E Shelf 6 as follows:
  - Boxes 1, 2: Cage - Aisle 9 - Bay A - Shelf 1
  - Boxes 3, 4: Cage - Aisle 9 - Bay A - Shelf 2
  - ...
  - Boxes 49, 50: Cage - Aisle 9 - Bay E - Shelf 6In this use case, a separate operation will need to be executed for each location (e.g. - Cage - Aisle 9 - Bay A - Shelf 1), requiring 25 different actions.
2. 20 boxes from one collection are being assigned new locations based on their container type in order to maximum space. The boxes are being shelved non-consecutively and each box has a different location. Updating this location information would require the archivist to perform 20 separate operations.

### Views and supported task sequences

#### UPDATED VIEW - Batch Operations: Update Locations: Multiple Locations

From a list of selected containers in the existing Manage Top Containers view, user will have new option “Update Locations: Multiple Locations” from Bulk Operations drop-down.

#### NEW POP-UP VIEW

- A table similar to the existing Rapid Data Entry screen will appear with the following columns: Resource / Accession, Container Indicator, Container Profile, Barcode, Current Location (if applicable), and New Location. All columns with the exception of New Location would already contain their pertinent data and would not be editable. See Figure F below for rough wireframe.
- In the New Location column, an archivist will have the option to type ahead to select a location, browse for a location, or create a location. Archivist would select or create a location using one of these methods.
- Archivists will continue creating or updating location information for all selected containers.

- When finished, archivists will select something akin to “Update Locations,” perhaps with an additional screen that allows for review before applying changes.
- For each container, the value in the Current Location field (if applicable) will be changed to “Previous Location.” The values entered into the New Location field would be applied as “Current Location.”
- After completing operation, a results screen will show the same table, updated to reflect the new location information.

Update Locations: Multiple Locations ×

Reorder Columns    Reset

Resource / Accession	Container profile	Container indicator	Barcode	Current location	New Location
MSS -- 413 Maria Ire	Flat file folder (half)	1	35489078	Bobst, 10, Tamiment,	Clancy Cullen [ offs ] ▼

Update Locations

Figure F – Rough Wireframe of Rapid Entry of Multiple Locations

### UPDATE - Batch Operations: Update Locations: Single Location

From a list of selected containers, existing “Update Locations” functionality available from Bulk Operations drop-down renamed to “Update Locations: Single Location” to differentiate it from the new functionality described above.

## 6. Assign or update repository “owners” or functional purposes of a specific Location or Location range

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### Scope and Purpose

This feature would allow archivists to designate particular locations as being suitable or reserved for specific entities (e.g. discrete repositories sharing locations), formats (e.g. microclimates best suited for audiovisual materials), or activities (e.g. incoming arrivals). This would allow the capture of information such as, “Row 4, Bay 2, Shelf 1 of 10 West is used for AV Access Copies;” or “Rows 4 - 10 of 10 West are owned by the Fales repository”. This would be an optional field, but potentially beneficial in scenarios where locations are shared spaces for multiple repositories, when trying to determine the best shelving location for a particular type of material, or when designing/performing a survey, rehousing, or renovation project.

### New and updated views

#### **UPDATED VIEW - Location Record**

The Create, Edit and View Location Record pages should include an additional, optional field titled “Reserved For.” To Create or Edit, a user will choose a value from a configurable lookup list.