Harvard Library

ArchivesSpace Container Management Enhancement Proposal

December 2018

Proposal Background

Large, multi-repository institutions using a single instance of ArchivesSpace have particular challenges finding, viewing, and updating information related to containers and locations in the system. In addition, some repositories need additional options for managing legacy container data from other systems and historical location information.

The Harvard Library is proposing to make enhancements to the existing container management features in the ArchivesSpace staff interface to address some of these needs. Subject to community review, these enhancements will be contributed to the core code.

While the specific changes Harvard proposes are more fully described in the user stories and mockups below, this proposal seeks to address the following higher-level repository needs:

- Repositories with a large number of Location records need additional options for sorting, filtering, and viewing Locations to more easily find and manage those records.

- Staff users only want to be presented with container and location options that are relevant to their own repository and do not want people not associated with the repository to make changes to these types of records. Filtering the staff view of Locations, Location Profiles, and Container Profiles by repository will allow for more efficient access to appropriate container and location management options.

- Repositories need to be able to record and to search and filter by additional container indicators for both Top Container and Child Container records in order to effectively manage existing physical containers.

- When viewing the Top Containers in a Location, staff need to be able to see additional information about each container to understand what holdings are housed in that particular location.

- When viewing the contents of a Top Container, staff need to be able to see information about the Resources associated with Archival Objects in the container. In some cases all objects will be associated with a single Resource; in other cases, objects associated with different Resources may be in the same container.

Proposal Background

- Repositories need to retain a history of a given Top Container's Locations, including Locations that may be permanent locations where a top container is temporarily housed. While ArchivesSpace currently permits recording historical location information, over time, there will be a greater need to distinguish current Top Container Locations from historical information. A number of the proposed changes support this need, including:

    - the ability to make Locations inactive; Locations that may no longer be used for the same storage purposes should still be retained in the system to understand the location history of a given Top Container;

    - the ability to designate the Location of a Top Container as its "temporary" location without requiring that Location itself to be considered temporary and even while the Top Container has a simultaneous "permanent" Location;

    - the ability to view all current and past Locations of a Top Container in an order based on the dates the container was associated with each location.

Database Field Additions

The Harvard Library proposes adding the following fields, listed by existing database table, to the ArchivesSpace database:

- **Location Profiles**
    - Repository

- **Locations**
    - Inactive (Boolean)
    - Note

- **Container Profiles**
    - Repository

- **Top Containers**
    - Indicator 2 (alphanumeric)
    - Indicator 3 (numeric)
    - ILS Bibliographic Record ID
    - Note

- **Container Instances**
    - Child Container Barcode

User Stories

These user stories describe the specific changes proposed. The stories are grouped by type of record affected and mockups displaying the related changes to the staff interface are included after all the user stories.

Location Profiles

- I want Location Profiles to be specific to my selected repository.

    - I want to be offered only my repository's Location Profiles when I manage Location Profiles and when I search for Location Profiles to link to a Location.

    - I want only users from my repository to be able to edit my repository's Location Profiles.

    These changes can be implemented as an institution-level configuration option so that an institution will have the option to implement repository-based filtering but will not be required to.

- I want to be able to choose Edit for a Location directly from the Manage Locations Profiles list (i.e., I want there to be an Edit button in the results table next to the View button as long as I have the appropriate permission).

Locations

- I want Locations to be specific to my repository.

    - I want to be offered only my repository's Locations when browsing Locations.

    - I want only users from my repository to be able to edit my repository's Locations.

    This changes can be implemented as an institution-level configuration option so that an institution will have the option to implement repository-based filtering but will not be required to.

- I want to be able to add a Note to a Location record and to filter Locations by text in the Note.

- I want to be able to designate a Location as inactive. I want Locations to be active by default and I want to be able to reactivate an inactive Location.

User Stories

Locations (Continued)

- When browsing Location Profiles from a Location record, I want to be offered only my repository's Location Profiles (if relevant--see Location Profiles above).

- When viewing a Location record, in the Linked Records table I want to see:

    - Sortable column for Resource/Accession, containing Title + Identifier, as currently shown;

    - New, sortable columns for Top Container Type; Indicators 1, 2, and 3 (see Top Containers, below); and Container Barcode;

    And I do not want to see:

    - The Record Type column and the column displaying record creation and update information

- When browsing Locations, I only want to see active Locations by default. I also want a facet option to include inactive Locations in the display.

- If a Location is inactive, I want to see an indication that it is inactive at the end of the Location Title.

- When browsing Locations, I want to see in the results:

    - The Title display string without the Location Coordinates, i.e., retaining a concatenation of Building, Floor, Room, and Area;

    - Each Location Coordinate Label and Indicator in a separate, sortable column (6 coordinate columns total);

    - Location Profile and repository Holdings, as currently shown;

    And I do not want to see:

    - Separate columns for Building, Floor, Room, Area;

    - The column displaying record creation and update information.

- When browsing Locations, I want to be able to select values from more than one facet, e.g. a facet for Building and a facet for Floor.

User Stories

Locations (Continued)

- When browsing Locations, I want to see as many results as possible per page and/or have the option to select the number of results to be displayed per page.

- When browsing Locations, I want to be able to select all records on the page with one click so that I can more quickly select Locations for batch functions.

- When editing Locations in batch, I want to be able to make the selected batch Inactive. [Lower Priority]

- When browsing Locations, I want to be able to select multiple values for a facet , e.g. multiple Floor options. [Lower Priority]

Container Profiles

- I want Container Profiles to be specific to my selected repository.
    - I want to be offered only my repository's Container Profiles when I manage Container Profiles and when I search for Container Profiles to link to a Container.
    - I want only users from my repository to be able to edit my repository's Container Profiles.

    These changes can be implemented as an institution-level configuration option so that an institution will have the option to implement repository-based filtering but will not be required to.

Top Containers

- As a staff member, I need to be able to parse my container indicators into up to three segments. I want the existing Indicator field to be Indicator 1 and I want Indicator 2 to be an additional alphanumeric indicator and Indicator 3 to be a numeric indicator.
    - I also want indicator 2 and indicator 3 to display with indicator 1 in the PUI wherever physical storage information is displayed.

- I want to be able to add a Note and an ILS Bibliographic Record ID to a Top Container record and to search for Top Containers by text in the Note.

User Stories

Top Containers (Continued)

- When browsing Container Profiles from a Top Container record, I only want to see only Container Profile records for my selected repository (if relevant; see Container Profiles above).

- When viewing a Top Container record, I want to see the Container Type field above the Indicators.

- When viewing a Top Container record, in the Linked Records table I want to see:
    - Columns for Record Type, Title, and Identifier, as currently shown;
    - New sortable columns for Child Container Type and Child Indicator;
    - A column for "Found In" breadcrumbs;

    And I do not want to see:
    - The column displaying record creation and update information.

    I also want the Linked Records table to be wider to accommodate the display of this additional information.

Top Container Locations

- When viewing a Top Container record, I want to see the Locations with the no end date at the top and Locations with an end date listed in descending end date order (i.e. most recent to earliest).

- When assigning a Location for a Top Container, I want to be able to select a status of "Permanent" instead of "Current" (i.e. the status option "Current" would be changed to "Permanent").

- When assigning a Location for a Top Container, I want to be able to select a status of "Temporary" (note: the status of "Previous" would still be an option). When I select a status of "Temporary" for my Location, I want to be able to choose any possible Location for my repository and not just Locations designated as Temporary.

- When viewing a Top Container record, I would prefer all Locations with an end date to display in a separate collapsible/expandable section to reduce the need to scroll. [Lower Priority]

User Stories

Top Containers - Manage Top Containers

- On the Manage Top Containers search page, I want to be able to search specifically for any one of the three Indicators.

- In the Manage Top Containers results table, I want to see:
    - New sortable columns for the two new Indicators;
    - In the Current location column, the most recent Location with a status of Temporary if that Location does not have an end date or the most recent Location with a status of Permanent if there is no open Temporary Location;

    And I do not want to see:
    - The Exported to ILS, ILS Holding ID, and Container Profile columns.

    I also want the Indicator 1 column to sort alphanumerically.

- When performing bulk operations on Top Container Barcodes, I want to be able to delete Barcodes. [lower priority]

Container Instances

- I want to be able to add a Barcode to a Child Container.

- When viewing a Container Instance, I want to see the three Top Container indicators as one concatenated string.

- When viewing a Container Instance, I want to see either the most recent Location with a status of Temporary if that Location does not have an end date or the most recent Location with a status of Permanent if there is no open Temporary Location.

- When browsing Top Containers, I want to have the same search options as on the Manage Top Containers page and have the results display in the same format (see Manage Top Containers above).

- When searching in the Top Container field, I want to be able to search by the full container name (for example, when searching for "Box 11", I can search by "11" but not by "Box 11").

- When clicking on the Top Container in the Instance record, I want to have an option to Edit the Top Container in addition to the option to View it.

Location Profile Record

Location Profiles can be associated with a repository and filtered by the user's repository

Location Record

Baker Library, Basement, Stacks [Row: 67, Bay: 1, Shelf: 8]   Location

Building	Baker Library
Title	Baker Library, Basement, Stacks [Row: 67, Bay: 1, Shelf: 8]
Floor	Basement
Room	Stacks
Coordinate Label	Row

Indicator 2

Coordinate Label 3	Shelf
Coordinate Indicator 3	8
Inactive	☐
Note	Some information
Repository	Baker Library Special Collections, Harvard Business School, Harvard University (BAK)

Locations can have notes and can be made inactive

Location Record

Baker Library, Basement, Stacks [Row: 67, Bay: 1, Shelf: 8] `Location`

Building	Baker Library
Title	Baker Library, Basement, Stacks [Row: 67, Bay: 1, Shelf: 8]
Floor	Basement
Room	Stacks
Coordinate Label	Row

Columns added for container type and indicators 2 and 3

Linked Records

Go to Search Results

Showing **1** - **1** of **1** Results

Sort by: Select ▾

Resource/Accession	Container Type	Container Indicator 1	Container Indicator 2	Container Indicator 3	Container Barcode	
Andrew F. Brimmer papers Arch GA 9.75	Box	481			BA01KN	View Edit

Browse Locations

An option to select all Locations on the page

Locations

Showing 1-50 of 458 Results

Select All

Sort by: Select

	Title	Coordinate Label 1	Coordinate Indicator 1	Coordinate Label 2	Coordinate Indicator 2	Coordinate Label 3	Coordinate Indicator 3	Location Profile	BAK Holdings		
☐	Baker Library, Basement, Stacks	Row	1	Bay	1	Shelf	1		3 top containers.	View	Edit
☐	Baker Library, Basement			Bay	1	Shelf	2		No holdi fo re	View	Edit
☐	Baker Library, Basement, Stacks	Row	1	Bay	1	Shelf	3		4 c		

Coordinate labels and indicators removed from Title display

Columns added for coordinate labels and indicators; Columns for building, floor, room, area removed

Browse Locations

Locations

Showing 1-50 of 458 Results

☐ Include Inactive Locations

Filtered By   Clear All

- Building: Baker Library ✖
- Floor: Basement ✖

Select A

Title	Coordinate Label 1	Coordinate Indicator 1	Coordinate Label 2	Coordinate Indicator 2	Coordinate Label 3	Coordinate Indicator 3	Location Profile	BAK Holdings
☐ Baker Library, Basement, Stacks	Row	1	Bay	1	Shelf	1		3 top contai
☐ Baker Library, Basement, Stacks	Row	1	Bay	1	Shelf	2		No holdi for this reposito
...ment, Stacks	Row	1	Bay	1	Shelf	3		No holding for this repository

Values from more than one facet can be selected and inactive Locations can be included

Container Profile Record

Container Profiles can be associated with a repository and filtered by the user's repository

Top Container Record

Box S 481 9: [HBA01KN] `Top Container`

Container Type	Box
Indicator	S 481 9
Barcode	HBA01KN
Exported to ILS	Not exported
ILS Bibliographic Record ID	99001275860203941
Note	Some information

Container type appears above the indicator

Containers can have three indicators, an ILS bib record ID, and a note

Top Container Record - Locations

Locations

Status	Temporary	
Start Date	2018-11-05	

⊙ Baker Library, Basement, Stacks [Row: 64, Bay: 6, Shelf: 8]

Container locations can be permanent or temporary (in addition to previous)

Status	Permanent
Start Date	2018-08-02

⊙ Harvard Depository [HD]

Location

Status	Permanent
Start Date	2018-01-01
End Date	2018-08-01

Location

⊙ Baker Library, Basement, Stacks [Row: 67, Bay: 6, Shelf: 3]

Top Container Record – Linked Records

Columns added for child container type and indicator and "Found In" collection hierarchy

Top Container Instance

Access to edit the top container from the instance

A child container can include a barcode

The container's current location displays with the instance

Manage Top Containers

Top Containers

Keyword

Indicator 1

Indicator 2

Indicator 3

Barcode(s)

Resource — Type to search available records..

Accession — Type to search available records..

Container Profile — Type to search available records..

Location — Type to search available records..

Exported to ILS

Unassociated containers

Specific search options for each indicator

Manage Top Containers

	Resource/Accession ▼	Series	Container Type	Indicator	Indicator 2	Indicator 3	Barcode	Current Location	Restricted?	
☐	Arch GA 9.75 Andrew F. Brimmer papers		Box	397			HBA01IE	Baker Library, Basement, Stacks [Row: 52, Bay: 1, Shelf: 6]	False	View Edit
☐	Arch GA 9.75 Andrew F. Brimmer papers		Box	398			HBA01IF	Baker Library, Basement, Stacks [Row: 52, Bay: 1, Shelf: 6]	False	View Edit
☐	Arch GA 9.75 Andrew F. Brimmer papers		Box	399			HBA01IG	Baker Library, Basement, Stacks [Row: 52, Bay: 1, Shelf: 6]	False	View Edit
☐	Arch GA 9.75 Andrew F. Brimmer papers		Box	357			HBA01H9	Baker Library, Basement, Stacks [Row: 52, Bay: 2, Shelf: 9]	False	View Edit
☐	Arch GA 9.75 Andrew F. Brimmer papers		Box	401			HBA01II	Baker Library, Basement, Stacks [Row: 52, Bay: 1, Shelf: 6]	False	View Edit
☐	Arch GA 9.75 Andrew F. Brimmer papers		Box	358			HBA01HA	Baker Library, Basement, Stacks [Row: 52, Bay: 2, Shelf: 10]	False	View Edit
☐	Arch GA 9.75 Andrew F. Brimmer papers		Box	404			HBA01IL	Baker Library, Basement, Stacks [Row: 52, Bay: 1, Shelf: 6]	False	View Edit
☐	Arch GA 9.75 Andrew F. Brimmer		Box	405			HBA01IM	Baker Library, Basement, Stacks [Row:	False	View Edit

Columns added for indicators 2 and 3; exported to ILS, ILS holding ID, and container profile columns removed