

Talking points for the ArchivesSpace accessioning refresher

General:

- Our instructions require more data entry than the system. The tooltips, added in the latest update, indicate if a field is required.
- The latest update included the addition of the next accession widget, “Receive date” field, and field names in the Additional Accession Data section (formally known as User Defined).
- Tooltips are shared between the Accessions and Resources module, which is why some fields do not have a tooltip. Unfortunately, tooltips cannot be added to the Additional Accession Data section.
- The public interface was added in a recent update. IS knows about this “trick” to access FY2018 accessions; however, more data and clean-up is needed before this interface can be fully utilized.

Basic Information:

- IN DRAFT is a way to reserve an accession number as well as make it obvious that more data entry is required. To prevent an accession record to be “IN DRAFT” for months, someone will nag the accessioning archivist to finish data entry. This will likely occur on a weekly basis.
- The title should be treated like we approach preferred citations. When the accession record is used to spawn a resource, the title carries over. The preference is to delete “Texas” in the resources module.
- Retention rule is for government records. The required information is AIN/SIN, Retention period, and Code. Other information, such as frequency of transfers and amendment/certification number, are added value.
- The General Note field should only be used to record information that does not fit in another field. One example may be noting the presence of binders that could be rehoused to maximize space.
- The instructions for the “Acquisition type” and “Resource type” include definitions for each category. Is there a preference on the order used for these two drop down menus? Frequency or alphabetical?
- Publish means it is visible on the “Public Interface.” We want accessions and resources to be discoverable. Accessions added to the “review” repository will not be published prior to appraisal. Material determined not to be archival after appraisal, in the interest of transparency.

Dates:

- Date expressions and begin/end dates are required by us. It is not the end of the world to have the dates recorded in one of these fields for accessioning; however, we would want to have information recorded in both date options in the resources module. The begin/end exports as the normalized dates, and the expression is wrapped by the appropriate date tags.
- The instructions include information about recording BCE dates.
- The instructions for the “Certainty” field include definitions for each category. The blank option can be selected when the date is reasonably true.

Extents:

- If the entire accession consists of one material type for which a number count of items will be recorded, use a second Whole for that item number. For example, 45 cubic ft. would be one whole and another whole may be about 5,000 sheets. Another common example is 2 GB for one whole and another whole may be 10 electronic files. Wholes are used for reporting purposes.
- Parts will be used less frequently. It may be that the total extent is 21 cubic ft. and 3 RS boxes contain folded maps. The parts selection is added value.
- The files category has been renamed electronic files to minimize confusion.
- There is no need to add “boxes” after RS, MS, littleMS in the container summary. If no new boxes are created for the accession (such as it is going into a previously established box), “n/a” is acceptable.
- Merging of subject headings, agent names, extent types, and the like will occur in the future. Importing legacy data a huge reason for duplication.

Agent links:

- The paper log only allowed for one creator. In ArchivesSpace, we can have multiple creators. For example, 2018/040 is for TCEQ records dating about 2000-2012. TCEQ should be noted, but Anna would argue it may be useful linking to also include TNRCC as a creator. This would likely be up to the accessioning archivist.
- The “Relator” field will be left blank, unless it is important to further define the Role entry of the Creator. The “Collector” option may be appropriate in select situations.
- Additional instructions have been created when an agent is not in ArchivesSpace.

Related Resources:

- Accruals may be associated with a finding aid. As we import our EAD finding aids into ArchivesSpace, accruals can be linked in the related resource section. See any of the Boards for Lease accessions for an example.

External documents:

- The file path will usually be a folder named with the accession number, saved at:
F:\Archives\Collections_management\Accessioning\ArchivesSpace_External_Documents].

Instances:

- We should remind accessioning archivists to update the stacksread database in addition to creating boxes and linking locations in ArchivesSpace. Anna will start checking to make sure Instances have been created (and locations linked) and that the stacksread database has been updated. This will likely occur on a weekly basis. Until all the locations data has been imported, the stacksread database will continue to be used for retrieval, planning, and assigning purposes.
- We will walk through the process to create Instances.
- Container profile is selected for standard sized boxes (RS, MS, littleMS). We will have to create container profiles for the OS box sizes we use.
- Container type outputs as <container type=“type selected”>. I think it would be best to do all the container information in one swoop rather than editing later. It can be edited if it is forgotten.
- We should discuss the use of parent/child in the Instances section. I think it is necessary for the yearly accession boxes, PP boxes, OS, and most other situations where the accession number is not the call number. Materials in these boxes are ordered by accession number, so it is

important to know what accession numbers are in which boxes. I'm not convinced it is necessary for minutes as it is the same series from the same agency. The only difference is some minutes may have been received in August 2017 and some in October 2017. For minutes, the accession number is not used for arranging records within a box (the date or advisory council is what dictates the order).

- E_Archives has been added as a possible Top Container.

Deaccessions/Collections Management:

- We'll note that deaccessioning/collections management have not been discussed at length. When we are ready, I have two accessions in ArchivesSpace that will be deaccessioned.

Additional Accession Data:

- Once you are done with data entry, remember to tick the "Accessioned" box.
- See the Location summary for standardization.
- Since the Function statement workflow has been added since the initial training, we should make sure there is enough time to discuss this "change." We realized this field is necessary after our initial request to IT.

Discussion of the "Review" repository? The Assessment module has not been tested.