ArchivesSpace Spreadsheet Upload Guide

Template and examples for spreadsheet located in:

Box\SCMshare\Archival Processing Section\ArchivesSpace Spreadsheet Upload

The template includes a blank row at the top to label the spreadsheet:

This is the expanded template for importing using aspace-import-excel. You may replace this line with something of your choosing after you've copied the file for your use.										
Mapping - ArchivesSpace Resource record SECTION	Resource Identifying Information	Archival Object Basic Information	Archival Object Basic Information	Archival Object Basic Information	Archival Object Basic Information	Archival Object Basic Information	Archival Object Basic Information	Archival Object Basic Information	Archival Object Basic Information
Mapping - ArchivesSpace Resource record FIELD with comments	EAD ID	Title	Unit_id	Hierarchical relationship of new component to context object. 1=the first level of archival objects, 2=second level, 3=third level, etc. 1 would indicate a sibling of the selected Arch. Obj (or the top level Arch. Obj. in a Resource that does not have any); 2 indicates a child, etc.	Level of Description:series, item, file, etc. (CONTROLLED LIST)		Publish (true/false) (NOTE: the selected value will apply to all publish elements in records or structures created by this row.)	Restrictions Apply (true/false)	Respository Processing Note
ArchivesSpace field code (please don't edit this row)	ead	title	unit_id	hierarchy	level	other_level	publish	restrictions_flag	processing_note

The next three rows are for ArchivesSpace mapping. The first row lists the mapping labels for each field. The second row includes comments about the field that aid the processor in filling out the spreadsheet. The third row has been shaded and is the ArchivesSpace field code that will be linking up each piece of metadata to the system.

The fourth row is another row of field labels to help guide the processor.

edit this row)									
Field name	**EAD ID**	**Title**	**Component Unique Identifier**	**Hierarchical Relationship**	**Description Level**	**Other Level**	**Publish?**	**Restrictions Apply?**	**Proces**

The template will include every possible field available in ArchivesSpace. Except for the fields in red, which indicate required fields, columns can be deleted, hidden or rearranged if they're not needed. For instance, the grandchild indicators are never used at our institution, so the column for Grandchild type and Grandchild indicator can be deleted.

Note that some columns already have in-column drop down data validation defined.

The following is a guide on how to fill out each of the fields, with some explanation of metadata standards at our institution, though processing guides should be consulted for further complexity. Each screenshot of the spreadsheet includes the row for the field code, the field label, and an example.

Field name:

ArchivesSpace field code (please don't edit this row)

Field name

This remains blank. It is a label indicating what type of information is contained in the row of field names.

EAD ID:

ead

EAD ID

UPB_UA5754

This is stating the information from the EAD ID field in ArchivesSpace, formatted as UPB_[call # with no spaces]. This is a required field and will import your spreadsheet to the correct Resource Record.

Finding Aid Data

EAD ID   UPB_UA5754
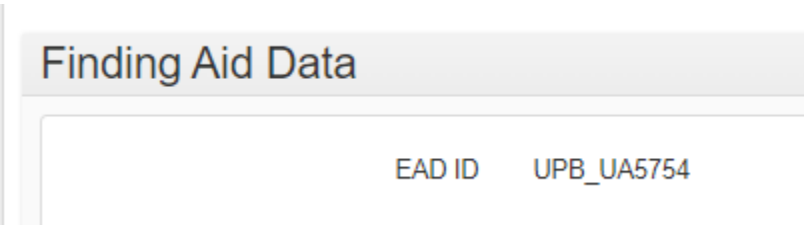
Title:

title

Title

Synthesis concert

Enter the title of the archival object. Diacritics will import. This is a required field if there is no date, and vice versa. Though that is just to allow for the fact that a date can be the title. But if you have title, a date is a DACS required field and should also be added.

Component Unique Identifier:

Enter the component unique ID (file or item number).

Hierarchical Relationship:

This is the relationship of the Archival Object you are entering to the selected resource (If you're entering an inventory below the collection level without series, or if you're entering it at the series or subseries level). If you enter a 1, the spreadsheet will load as a sibling to the series you selected, or as a child under the collection-level. If you enter a 2, it will load as a child under the series or subseries you selected. Because of the limit in data our support of ArchivesSpace allows for, we rarely load more complex data below one set of series or subseries data at a time. This is a required field.

Description Level:

This is an in-column drop-down. Choose the relevant description level for the archival object. This is usually "file" and "item", as "collection," "series," and "sub-series" are usually entered in manually to ArchivesSpace with less time than it takes to make this spreadsheet.

Skip the column for other level (and delete or hide it to make the spreadsheet more useable).

Publish:

publish

If you want the archival object to publish to the public-facing interface, select the drop-down "TRUE" for all rows. If you do not select anything, when the spreadsheet imports it will not check the publish box in ArchivesSpace.

Publish?

TRUE

Restrictions Apply:

restrictions_flag

Restrictions Apply?

FALSE

If the archival object has a Conditions Governing Access Note indicating a restriction, the "Restrictions Apply?" box should also be checked in ArchivesSpace. Selecting "TRUE" in the drop-down on the spreadsheet will check this box. If there are no restrictions, select "FALSE." If you do not select anything, when the spreadsheet imports it will not check the restrictions box. Please note that in order to have restrictions flagged, there must also be a Conditions Governing Access note at the same level as the archival object. If there is a restriction note at any level above, the Restrictions Apply? checkbox should be checked at that level.

Skip the column for other Repository Processing Note (and delete or hide it to make the spreadsheet more useable).

Dates Label:

dates_label

Dates Label

Creation

Type the date label you will be using, matching the format of the selections in the ArchivesSpace drop-down controlled value list. Most often, this is "Creation." The spreadsheet won't import data from the date fields if this label field is not filled out or does not match the controlled value list.

Please note that until ArchivesSpace is upgraded to 3.0, this spreadsheet does not allow for more than one date to be entered.

Date Begin and Date End:

begin	end
Date Begin	**Date end**
1977-06-02	1977-06-03

Date Begin and Date End fields should have dates entered in standardized form as entered into the field in ArchivesSpace (where there is an option to select from a calendar).

YYYY, YYYY-MM, or YYYY-MM-DD

i.e. 1979-09-01 for September 1, 1979.

If there is a range of dates, fill out the both the Date Begin and Date End fields. If it is a single date, leave the Date End blank.

Dates Type:

date_type
Dates Type
Inclusive

Select "bulk," "single," or "inclusive" from the drop-down selection. Bulk is rarely used. Inclusive is for the date range, and single is for a single date. If you select single, any value in the Date End column will be ignored. If you type in something besides the three options, it will be overriden with the value "inclusive."

Date Expression:

expression
Date expression
1977 Summer

This is the full DACS date, i.e. 1979 September 1. Or, if it's been approximated, "approximately 1979," "before 1979," or "after 1979," or "1979 Summer," and other expressions outlined in the processing guide.

Date Certainty:

date_certainty
Date Certainty

If the date was approximated or inferred, put "approximate" or "inferred" here. If it was known, leave this cell blank.

Extent Portion:

portion
Extent portion
whole

Type the extent portion ("whole" if there is only one extent, "part" if there are multiple parts to the extent). Until we upgrade ArchivesSpace to 3.0, we cannot have more than one extent. So if your extent is two-part, add the first extent with "part" as the portion, and the other part will need to be added manually.

Extent Number:

number
Extent number
1

If you are adding an extent, this field is required. Type the number reflecting the number of containers or type of materials in your extent.

Extent Type:

extent_type	If you are adding an extent, this field is also required. Your entry must match the controlled value list in ArchivesSpace.
Extent type: cubic feet, cds, etc.	
folder	

Container Summary:

container_summary	Enter the container summary information if applicable. This field can remain blank. File level description for folders does not have a Container Summary.
Container Summary	
(17 pages)	

Physical Details:

physical_details	Enter the physical details for the extent if applicable, otherwise leave blank. This field is more commonly used with item-level description.
Physical Details	
color	

Dimensions:

dimensions
Dimensions
18 x 22 cm

Enter the dimensions for the extent if applicable, otherwise leave blank. This field is more commonly used with item-level description.

Container Instance Type:

cont_instance_type
Container Instance Type
Graphic Materials

Container Instance Type is a controlled value list in ArchivesSpace and the selection should be typed in exactly as it matches in that list. If you are adding container information, the Type and Indicator must both be present, otherwise the indicator value will import as "unknown."

Top Container [indicator]:

indicator_1
Top Container [indicator]
1

Type the container number into this field. If nothing is put here, the field will import as "unknown."

Barcode:

barcode	Enter the barcode for the container the archival object belongs to, if available. If you have a barcode, the system will search for that matching number and assign the Top Container already attached to it. If there is no match, or no barcode number is provided, a new Top Container will be created based on the information you provided above.
barcode	
31197239263095	

Child Type:

type_2	Child Type is a controlled value container type list in ArchivesSpace and the selection should be typed in exactly as it matches in that list. If you are adding container information, the Child Type and Child Indicator must both be present, otherwise the indicator value will import as "unknown."
Child type	
Folder	

Child Indicator:

indicator_2	Type the child container number into this field. If nothing is put here, the field will import as "unknown."
Child indicator	
1	

Grandchild type and indicator should be deleted from the spreadsheet.

Digital Object Title, URL of Linked-out digital object, and URL of thumbnail are fields are not used by the Archival Processing Section.
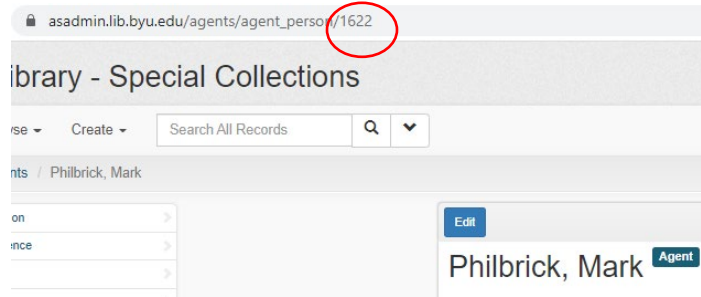
Agent/Creator (1) Record ID:

people_agent_rec
ord_id_1

Agent/Creator (1)
Record ID

1622

If you have a Person Agent record you would like to link to the archival object, you must use the Record ID number that shows up at the end of the URL when the Agent record is open in ArchivesSpace. You must use this or the full header string to match the records. If no Agent record is found to match, ArchivesSpace will create a new Agent record on import.
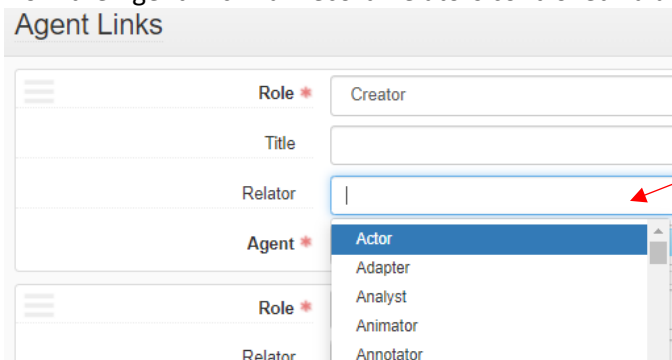
asadmin.lib.byu.edu/agents/agent_person/1622

ibrary - Special Collections

Create ▾   Search All Records

nts / Philbrick, Mark

Edit

Philbrick, Mark Agent

Agent/Creator (1) Header String:

people_agent_header_1

Agent/Creator (1) header
string

Philbrick, Mark

If you have a Person Agent record you would like to link to the archival object, you must use the header string exactly as it appears in ArchivesSpace, with all capitalization and punctuation. You must use this or the Record ID to match the records. If no Agent record is found to match, ArchivesSpace will create a new Agent record on import.

Edit

Philbrick, Mark Agent

Agent/Creator (1) Relator:

people_agent_r
elator_1

Agent/Creator
(1) Relator

Photographer

If you choose to supply a relator for the Person Agent (not required), it must come from the Agent Archival Record Relators controlled value list in ArchivesSpace:

Agent Links

Role ✱	Creator
Title	
Relator		
Agent ✱	

Actor
Adapter
Analyst
Animator
Annotator

| Role ✱ | |
| Relator | |

The second and third sets of columns for Agents and Creators can be used, deleted or hidden.
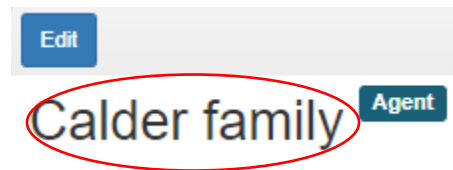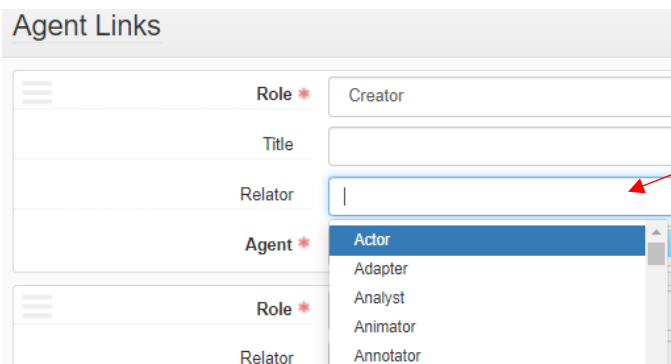
families_agent_header_1
Family Agent header string
Calder Family

Family Agent Record ID:

If you have a Family Agent record you would like to link to the archival object, you must use the Record ID number that shows up at the end of the URL when the Agent record is open in ArchivesSpace. You must use this or the full header string to match the records. If no Agent record is found to match, ArchivesSpace will create a new Agent record on import.
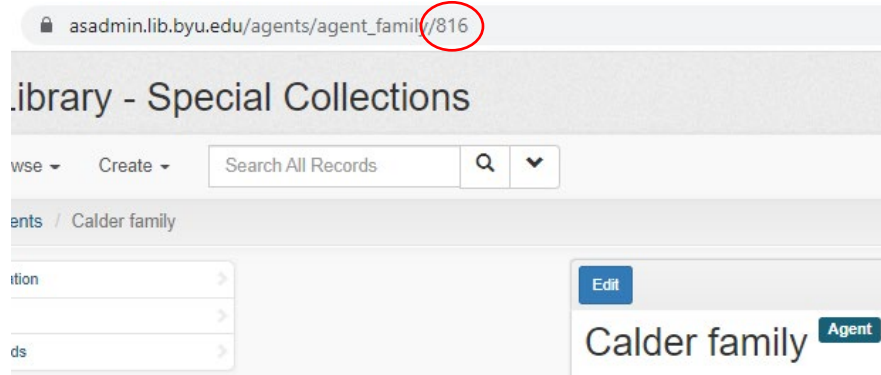
families_agent_record_id_1
Family Agent Record ID
816

Family Agent Header String:

If you have a Family Agent record you would like to link to the archival object, you must use the header string exactly as it appears in ArchivesSpace, with all capitalization and punctuation. You must use this or the Record ID to match the records. If no Agent record is found to match, ArchivesSpace will create a new Agent record on import.

| families_agent_relator_1 |
|---|
| **Family/Creator Relator** |
| |
| Creator |

Family/Creator Relator:

If you choose to supply a relator for the Person Agent (not required), it must come from the Agent Archival Record Relators controlled value list in ArchivesSpace:

Corporate Agent Record ID:

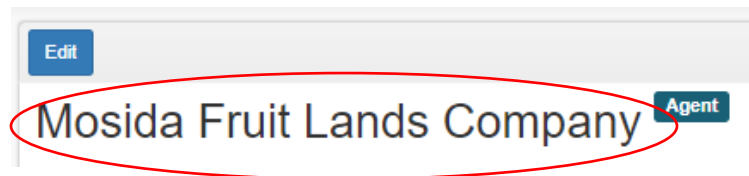| corporate_entities_agent_record_id_1 |
|---|
| Corporate Agent Record ID |
| 725 |

If you have a Corporate Agent record you would like to link to the archival object, you must use the Record ID number that shows up at the end of the URL when the Agent record is open in ArchivesSpace. You must use this or the full header string to match the records. If no Agent record is found to match, ArchivesSpace will create a new Agent record on import.
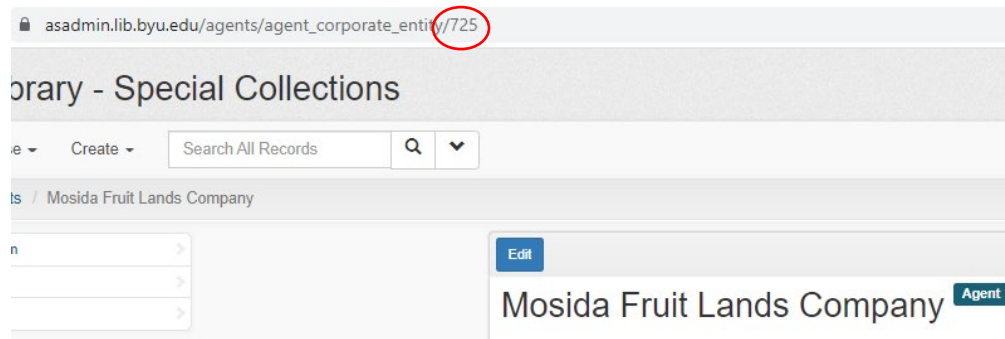
Corporate Agent Header String:

| corporate_entities_agent_header_1 |
|---|
| Corporate Agent header string |
| Mosida Fruit Lands Company |

If you have a Corporate Agent record you would like to link to the archival object, you must use the header string exactly as it appears in ArchivesSpace, with all capitalization and punctuation. You must use this or the Record ID to match the records. If no Agent record is found to match, ArchivesSpace will create a new Agent record on import.

Corporate Agent Relator:

corporate_entities_agent_relator_1
Corporate /Creator Relator(2)
Creator

If you choose to supply a relator for the Corporate Agent (not required), it must come from the Agent Archival Record Relators controlled value list in ArchivesSpace:
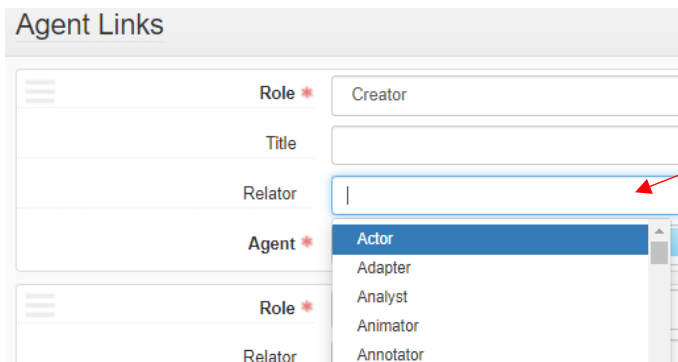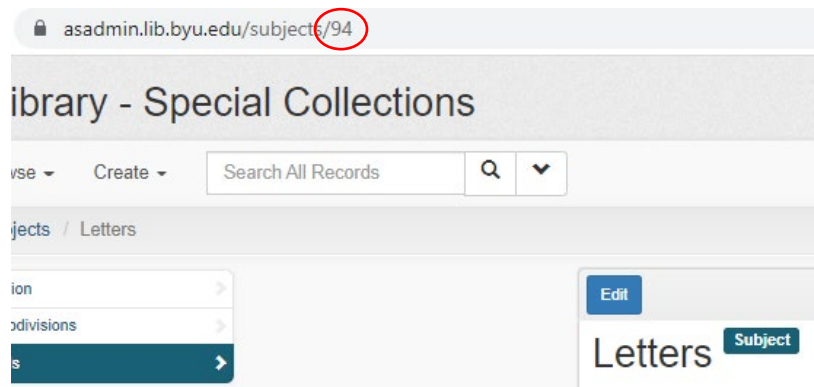
The second set of columns for Corporate Creators can be used or deleted.

Subject (1) Record ID:

Subjects can be added to each archival object in the spreadsheet, and we do want all file and item level archival objects to be associated with a genre form subject heading. You must use the Record ID number that shows up at the end of the URL when the subject record is open in ArchivesSpace. You must use this or the full header string, type, and source together to match the records. If no subject record is found to match, ArchivesSpace will create a new subject record on import.

Subject (1) Term:

If you have a subject record you would like to link to the archival object, you must use the header string exactly as it appears in ArchivesSpace, with all capitalization and punctuation. You must use this along with the type and source, or just the Record ID, to match the records. If no subject record is found to match, ArchivesSpace will create a new Agent record on import.

Subject (1) Type:

subject_1_type	Subject Type is a controlled value list in ArchivesSpace and the selection should be typed in exactly as it matches in that list and has been assigned to the subject record. The header string, type, and source must all be present together to match a record in ArchivesSpace, or the Record ID by itself can also be used to match a record. If no subject record is found to match, ArchivesSpace will create a new Agent record on import. When creating that record, if no type is selected, "topical" will be the default.
Subject (1) Type	
Genre/Form	

Subject (1) Source:

subject_1_source	Subject Source is a controlled value list in ArchivesSpace and the selection should be typed in exactly as it matches in that list and has been assigned to the subject record. The header string, type, and source must all be present together to match a record in ArchivesSpace, or the Record ID by itself can also be used to match a record. If no subject record is found to match, ArchivesSpace will create a new Agent record on import. When creating that record, if no source is selected, "ingest" will be the default.
Subject (1) Source	
Library of Congress Subject Headings	

The second set of columns for Subjects can be used or deleted.

Skip the columns for Abstract, Dimensions, Physical Description, Physical Facet, Physical Locationand Preferred Citation (and delete or hide them to make the spreadsheet more useable).

Notes: Note columns can be added or deleted as need. In ArchivesSpace 3.0, the spreadsheet will ask about whether you want to publish the note or not. If you need to repeat a note, you can use an unsued note field and we can ask Greg Reeve to run an API to change the note label once the spreadsheet has imported. Notes most commonly used at the file and item level include:

Access Restrictions:

n_accessrestrict
Access Restrictions
Restricted for 85 years from date of creation due to HR information and FERPA.

This note is used to draw attention to restricted materials, whether condition restricted or otherwise.

Biography/History:

n_bioghist
Biography/History
Schuman (born 1931) is a performing artist, composer, and teacher. Schuman was

This note will always need a label appended to it to distginuish between an administrative and biographical history, so this will need to be tracked and added manually to ArchivesSpace.

General:

n_odd
General
Title from envelope recto.

This field is usually used at the file or item level to state where the title came from, or to state an alternate title and its source.

Language of Materials:

n_langmateri al
Language of Materials
Materials in English and Chinese.

This field maps to the Languages section of the finding aid where portions of languages found in the collection can be stated.

Languages

> Multiple languages

Notes

Language of Materials Note

Persistent ID   ade511a7⁙

Publish?   True

Content

Materials in English and Chinese.

Raw   Formatted

Scope and Contents:

n_scopeconte nt
Scope and Contents
Typescript of a history of the Nebeker family, which

This is a commonly used note at file and item levels to mention extra information about the materials that cannot be captured in the title.

Acquisition Information, Arrangement, Custodial History, Processing Information, Related Materials, Separated Materials, and Use Restrictions are used at our institution but are usually utilized at the collection level.

ArchivesSpace's GitHub provides additional documentation on the template spreadsheet [here.](#)

Once your spreadsheet is complete, it will have to be fully tested on the staging server of ArchivesSpace and reviewed for metadata compliance by the Archival Processing Section before being uploaded to production.