



Orbis Cascade Alliance Archives & Manuscripts Collections Service

ArchivesSpace Preferences, Controlled

Value Lists, & Default Values

For Institutions Using Alliance ArchivesSpace Hosting

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Table of Contents

[Overview](#)

[Repository Records: For Institutions with a Single Repository](#)

[Repository Records](#)

[Repository Records: For Institutions with Multiple Repositories](#)

[Repository Records](#)

[Preferences: An Overview](#)

[Differences between Global, Repository and User preferences](#)

[Setting Preferences: Single Repository](#)

[Global](#)

[Repository Preferences](#)

[User Preference Defaults](#)

[Setting Preferences: Multiple Repositories](#)

[Global Preferences](#)

[Repository Preferences](#)

[User Preference Defaults](#)

[Controlled Value Lists: An Overview](#)

[Setting Controlled Values: For Single Repository](#)

[Setting Controlled Values: For Multiple Repositories](#)

[Pre-Populating Fields with Default Values](#)

[Setting Default Values: For Single Repository](#)

[Setting Default Values: For Multiple Repositories](#)

[Rapid-Data Entry Templates](#)

[Public Portal Settings](#)

[Turning the Public Portal on/off](#)

[Changing the logo, styles or text of the Public Portal](#)

[Log Files](#)

Overview

By configuring your ArchivesSpace (AS) instance thoughtfully, you can help make your descriptive metadata consistent, compliant with standards, and more free of errors. Since your institution's AS is hosted by the Alliance, many default values, preferences, and controlled value lists will be pre-set in your instance. These presets help ensure compliance with DACS, the EAD Best Practices, and other practices that make your institution's data flexible for re-use. They also allow the AS2AW script to work correctly.

Configuration settings and default values can also customize repository-specific information, data entry options, and display. Though some of these settings are only accessible through the server, quite a few can be changed through the browser interface by users with System Administrator or Manager-level permissions. Institutions should customize thoughtfully with an eye to future migrations.

Repository Records: For Institutions with a Single Repository

Repository Records

Repository Records contain information about your institution, including its name, physical address, email address, and so on. Repository Records will appear as DACS element 2.2, Name and Location of Repository, in any outputs.

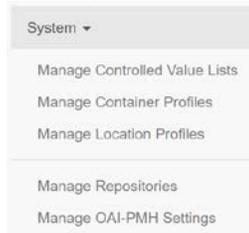
The Alliance will set up one Repository Record for your institution with the following information:

- Short institution name (This will only be used internally within the AS application and will not be published in any outputs.)
- Full institution name (This will be exactly the same name as appears in the Archives West repository registry)
- MARC code for the institution
- Country (United States)

Your System Administrator should do the following to add the other information for your Repository Record:

1. Log in as a System Administrator

2. Go to System > Manage Repositories



3. Click on “Edit”

4. Fill out the fields in the Repository Record according to the guide in [Appendix I](#) and then click Save Repository.

Fill out all fields that are marked in red; these are required for DACS compliance. Many of these fields will publish into the finding aids and other metadata records that you export from AS.

Repository Records: For Institutions with Multiple Repositories

Repository Records

Repository Records contain information about your institution, including its name, physical address, email address, and so on. Repository Records will appear as DACS element 2.2, Name and Location of Repository, in any outputs.

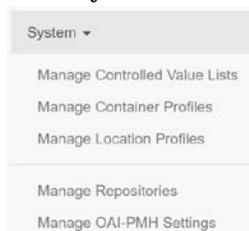
The Alliance will set up **one** Repository Record for your institution with the following information:

- Short institution name (This will only be used internally within the AS application and will not be published in any outputs.)
- Full institution name (This will be exactly the same name as appears in the Archives West repository registry)
- MARC code for the institution
- Country (United States)

Your System Administrator should do the following to add the other information for your Repository Record:

5. Log in as a System Administrator

6. Go to System > Manage Repositories



7. Click on “Edit”

8. Fill out the fields in the Repository Record following [Appendix I](#) and then click Save Repository. **Fill out all fields that are marked in red; these are required for DACS compliance.** Many of these fields will publish into the finding aids and other metadata records that you export from AS.

You may have multiple Repositories within one AS instance. For example, if your institution includes an Archives, a Records Management Office, and a Museum, each of these could be designated as a separate Repository with its own name and address. Multiple repositories are good if you have separate locations with different addresses, defaults, and staff permissions. However, too many repositories can waste staff time and add needless complexity.

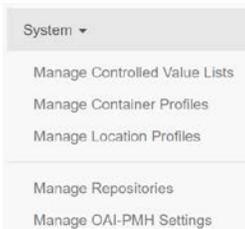
Criteria for setting up more than one repository can include:

- Do you have separate staff for each repository that you don't want working in the other repository? If so, separate repositories allow you to control what they can do with many elements (e.g. accessions, resource records, digital objects), but they could have access to Agents, Subjects, and Events across all repositories.
- Are they physically separate units with their own contact information? If so, separate repositories allow you to make that contact information accurate.
- Do the repositories have different practices, and how significant are they? For instance, having separate repositories so that you can set different prefixes for accession or collection identifiers is convenient, but may not be worth the time to maintain two separate sets of default values. If there are more significant differences, like describing collections at completely different levels (e.g. items vs. collections), then consider separate repositories.
- Do you and/or your staff need to search the staff-side interface of AS across repositories, or one at a time? So, for instance, if you're looking for an accession record that could be in either repository, you'll have to search for it in each of them. If you often need to search all of your collections, you may find that constantly switching between repositories wastes time.

If you determine that multiple Repository Records would be beneficial for your institution, you will need to set up those additional Repository Records.

To add a Repository Record:

9. Log in as a System Administrator
10. Go to System > Manage Repositories



11. Click on Create Repository”
12. Fill out the fields in the Repository Record as seen in [Appendix II](#) and then click Save Repository. **Fill out all fields that are marked in red; these are required for DACS compliance.** Many of these fields will publish into the finding aids and other metadata records that you export from AS.

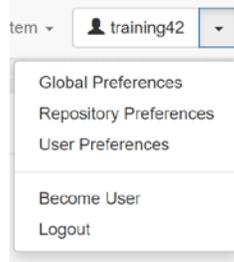
Preferences: An Overview

A few general preferences can be set through the “Preferences” menus. These settings affect a limited number of variables, such as whether fields are published by default, how columns appear when browsing records, and whether fields are pre-populated with default values. For customization of default text and other options, see [Pre-Populating fields](#) and [Controlled Value Lists](#), below.

Differences between Global, Repository, and User preferences

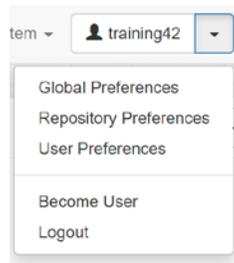
- **Global Preferences**

Requires login with System Administrator permissions. Global Preferences are **system-wide** user preferences that can be set as the defaults by a System Administrator. Repository or User preferences can override these default preferences. To edit, click on the down arrow next to the user name in the top right corner and choose “Global Preferences”:



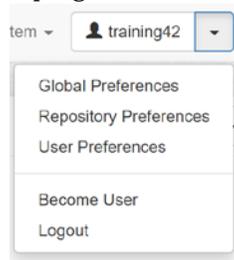
- **Repository Preferences**

Requires login with Manager or System Administrator permissions. Repository preferences are specific to a **single repository** and cannot be overridden by User preferences. To edit, click on the down arrow next to the user name in the top right corner and choose “Repository Preferences”:



- **User Preferences**

Requires login with Manager or System Administrator permissions. User Preferences are specific to a **single repository**. As of version 1.5+ of AS, they are identical to “Repository Preferences” except that they can be overridden by the personal User preferences of another Manager or System Administrator. To edit, click on the down arrow next to the user name in the top right corner and choose “User Preferences”:



Setting Preferences: Single Repository

Global

The Alliance will set the following Global Preferences:

- General Settings: Show Suppressed: leave unchecked.
 - Turning on this option will allow users of your AS administrative portal to see suppressed records. If it is left unchecked, suppressed records are not visible.
- General Settings: Publish?: leave unchecked.
 - Turning on this option will cause the “Publish?” checkbox in each individual record to be checked by default at the point when you create a new record. This means that unless your data entry users manually uncheck the “Publish?” checkbox in an Accession or Resource (or other) record, that record will automatically publish itself to your public AS portal when the record is saved. Note that this preference setting only applies to new records; it does not retroactively affect records that are already created.
- General Settings: Pre-Populate Records: check.
 - Turning on this option will allow settings from the “Edit Default Values Tool” to pre-populate fields in records. Normally you would want to keep this turned on, so that defaults set by administrators work for data entry users. Note that this preference setting only applies to new records; it does not retroactively affect records that are already created, nor does it affect records spawned from previously existing records. See [Pre-Populating Fields](#) for more information.
- Accession Browse Columns 1-5: Include identifier and accession date
- Resource Browse Columns 1-5: Include identifier
- Digital Object Browse Columns 1-5: Include identifier
- Note Order: (This reflects the order of notes required by DACS or preferred for the EAD Best Practices)
 - Abstract
 - Biographical/ Historical Note
 - Scope and Contents
 - Conditions Governing Access
 - Language of Materials

The institution can then set the Global Preferences: see [Appendix III](#).

Repository Preferences

The Global Preferences set by the Alliance and augmented by the institution will carry through to the Repository, so the Alliance will not set any additional preferences at the Repository level.

Because the Global Preferences carry through, there is no need for the institution to set any additional Repository Preferences.

User Preferences

The Global Preferences set by the Alliance and augmented by the institution will carry through to the Repository, so the Alliance will not set any User Preferences.

Because the Global Preferences carry through, there is no need for the institution to set any additional User Preferences.

Setting Preferences: Multiple Repositories

Global Preferences

The Alliance will set the following Global Preferences for the institution's first repository:

- General Settings: Show Suppressed: leave unchecked.
 - Turning on this option will allow users of your AS administrative portal to see suppressed records. If it is left unchecked, suppressed records are not visible.
- General Settings: Publish?: leave unchecked.
 - Turning on this option will cause the "Publish?" checkbox in each individual record to be checked by default at the point when you create a new record. This means that unless your data entry users manually uncheck the "Publish?" checkbox in an Accession or Resource (or other) record, that record will automatically publish itself to your public AS portal when the record is saved. Note that this preference setting only applies to new records; it does not retroactively affect records that are already created.
- General Settings: Pre-Populate Records: check.
 - Turning on this option will allow settings from the "Edit Default Values Tool" to pre-populate fields in records. Normally you would want to keep this turned on, so that defaults set by administrators work for data entry users. Note that this preference setting only applies to new records; it does not retroactively affect records that are already created, nor does it affect records spawned from previously existing records. See [Pre-Populating Fields](#) for more information.
- Accession Browse Columns 1-5: Include identifier and accession date
- Resource Browse Columns 1-5: Include identifier
- Digital Object Browse Columns 1-5: Include identifier
- Note Order: (This reflects the order of notes required by or preferred for DACS and the EAD Best Practices)
 - Abstract
 - Biographical/ Historical Note
 - Scope and Contents
 - Conditions Governing Access
 - Language of Materials

The institution can then set the Global Preferences if they would like them to apply for all Repositories: see [Appendix III](#).

Repository Preferences

The Global Preferences set by the Alliance and augmented by the institution will carry through to the Repository, so the Alliance will not set any additional preferences at the Repository level.

Because the Global Preferences carry through, there may be no need for the institution to set any additional Repository Preferences. However, if there are preferences that apply only to one repository but not all, the institution should modify preferences on that repository as follows: see [Appendix IV](#).

User Preferences

Because the Repository Preferences carry through, there is no need for the institution to set any additional User Preference Defaults. **Controlled Value Lists: An Overview**

In ArchivesSpace, the options that are available in data entry fields that you select through drop-down menus are called "Controlled Value Lists."



Example of a Controlled Value field

System Administrators and Managers with the rights to do so can change these fields through the Controlled Value Lists tool. The tool allows you to:

- Create, suppress, or delete most entries in Controlled Value fields
- Set certain Controlled Values as the Default
This is one of two ways to set defaults in controlled value fields. See cautionary note below.*
- Merge Controlled Values
Example: Suppose you had controlled values in your Container Types for “folders” and “fldrs”. Merging “fldrs” into “folders” would transform the “fldrs” term into “folders.”

Settings in Controlled Value Lists can improve data entry efficiency and compliance with standards.

Setting Controlled Values: For Single Repository

The Alliance will set the following Controlled Values for each institution with a single repository in their instance:

- Date type: Move Inclusive to Position 0
- Job type: Move Import_job to Position 0
- Language ISO: Set to eng
- Name person name order: Set to inverted
- Resource finding aid description rules: Set to DACS
- Date calendar: Set to Gregorian as default
- Date era: Set to ce as default
- Add browsing terms to Subject Source with source as “archiveswest” and set to position 0

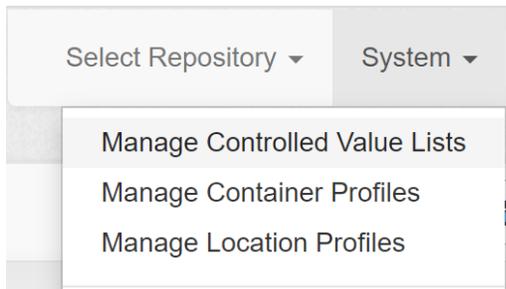
Institutions should not modify the following Controlled Values settings:

- Job type: Move Import_job to Position 0
- Name person name order: Set to inverted
- Resource finding aid description rules: Set to DACS
- Add browsing terms to Subject Source with source as “archiveswest” and set to position 0

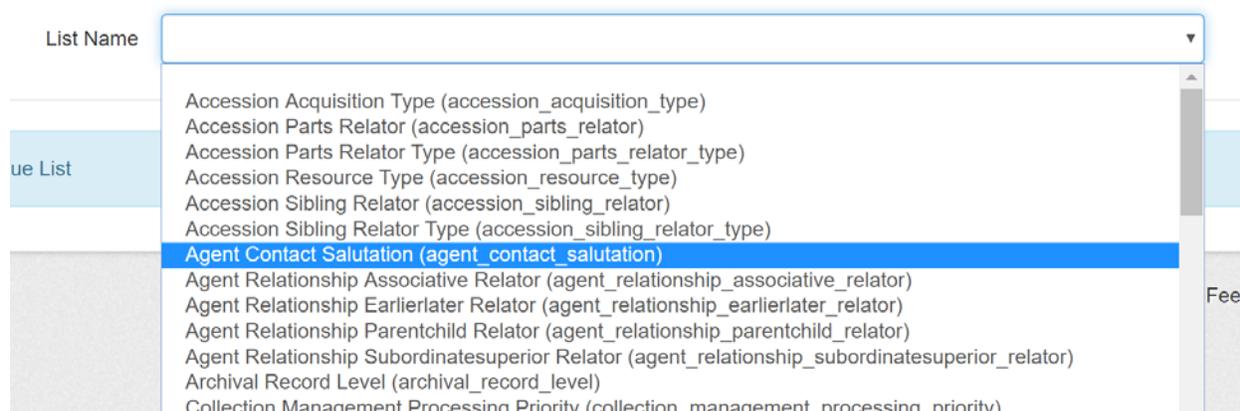
The Alliance will also import the Archives West browsing terms as a batch.

An institution’s System Administrator may wish to modify or set the following Controlled Values for their single repository:

To change Controlled Values select “Manage Controlled Value List” from the System drop down menu.



Select a list.



Then reorder, set as default, suppress, merge, or delete as needed.

Controlled Value List: Accession Acquisition Type (accession_acquisition_type)						
Value	Translation	Position	Suppress	Default		
deposit	Deposit	0 ↓			Set as Default	Not used.
gift	Gift	1 ↑ ↓			Set as Default	4 related items.
purchase	Purchase	2 ↑ ↓			Set as Default	1 related item.
transfer	Transfer	3 ↑ ↓			Set as Default	Not used.
BOGUS4	BOGUS4	4 ↑ ↓			Set as Default	Not used.
Gift	Gift	5 ↑			Set as Default	Not used.

See Guide to Controlled Values in [Appendix V](#).

Setting Controlled Values: For Multiple Repositories

The Alliance will set the following Controlled Values for each institution in a single repository in their instance:

- Date type: Move Inclusive to Position 0
- Job type: Move Import_job to Position 0
- Language ISO: Set to eng
- Name person name order: Set to inverted
- Resource finding aid description rules: Set to DACS
- Date calendar: Set to Gregorian as default
- Date era: Set to ce as default
- Add browsing terms to Subject Source with source as “archiveswest” and set to position 0

The Alliance will also import the Archives West browsing terms as a batch.

Institutions should **not** modify the following Controlled Values settings:

- Date type: Move Inclusive to Position 0
- Job type: Move Import_job to Position 0
- Name person name order: Set to inverted
- Resource finding aid description rules: Set to DACS
- Add browsing terms to Subject Source with source as “archiveswest” and set to position 0

The institution should then set the following as they set up any **additional** repositories:

- Date type: Move Inclusive to Position 0
- Job type: Move Import_job to Position 0
- Language ISO: Set to eng (unless another language is predominant in the repository)
- Name person name order: Set to inverted
- Resource finding aid description rules: Set to DACS
- Date calendar: Set to Gregorian as default
- Date era: Set to ce as default
- Add browsing terms to Subject Source with source as “archiveswest” and set to position 0

A System Administrator may then modify or set the following Controlled Values for each of their repositories according to [Appendix V](#).

Pre-Populating Fields with Default Values

It is possible to pre-populate fields in AS with default text or selections. This may help significantly improve the efficiency and accuracy of data entry tasks for your repository. AS provides two main ways to do this: the Edit Default Values tool and the Rapid Data Entry tool. It is also possible to set default selections in Controlled Value Lists using that tool, but under most circumstances it is better to set them using the Edit Default Values tool instead (for more details, see the *Cautionary Note* under [Controlled Value Lists](#)).

Users with Manager or System Administrator permissions can pre-populate most fields in AS, including nearly every field in the Accession, Resource, Digital Object, Subject, and Agent records. Default values are set on a per-Repository basis, so if you have multiple Repositories, you will need to do this separately for each one of them. Note that these default values will only apply to newly-created records, they do not retroactively affect old records that have already been created, nor do they apply to records that are spawned from existing records. To edit your default values:

1. Log in as a System Administrator or Manager
2. If you have multiple Repositories, select the correct one
3. Go to Browse > [Select Record Type]
4. Click on the Edit Default Values; Note: Resource edits the parent level, Resource Component refers to the child level.
5. Fill out any desired fields (see below for recommended default values)
6. Click Save

***Important*: In order for your default values to pre-populate newly created records, the**

“Preferences” option to Pre-Populate fields in your repository must be turned on. See the options under [Setting Preferences](#) for directions on how to do this.

**Cautionary note about setting defaults through Default Values:* There are two ways you can set the default entries for controlled-value fields. One is through the Controlled Value Lists tool; the other is through the Edit Default Values Tool.

The difference is that the Edit Default Values Tool will automatically enter your selections in *EVERY* matching field when you save new records. For example, changing a “Date Type” in Default Values will add it to the Date Field even if that field is otherwise empty, such as in a component item record where you did not plan to add a date. This can create extra empty elements that cause errors when you’re validating the file.

In contrast, selecting defaults using the Controlled Value Lists Tool will *ONLY* set those defaults in the specific fields that you select on a per-record-type basis. This is less likely to cause errors. So when in doubt, use the Controlled Value Lists tool rather than the Edit Default Values Tool. And only set default values for things that you use in **every** record, like Extent types. If it’s something that you don’t use in every collection, move your most common option to position 0 in the Controlled Value lists.

General note about Default Values for Resource Records: These defaults will only appear in new Resource Records that are created from scratch. If you spawn a Resource Record from an Accession, AS will use entries from the Accession Record to pre-populate the fields, rather than these entries.

Setting Default Values: For Single Repository

The Alliance will set Default Values for your repository as follows:

- Accession
 - Title: Placeholder text: [Title here]
 - Content Description: Placeholder text: [Description here]
 - Publish?: Leave unchecked
 - Date Label: Select Creation
 - Date Expression: Placeholder text: [Dates in YYYY-YYYY format]
 - Date Type: Select Inclusive Dates
 - Extents Portion: Select Whole
 - Container Summary: Placeholder text: [Describe boxes, items, etc. here]
- Resource
 - Level of Description: Select Collection
 - Language: English
 - Dates Label: Select Creation
 - Date Expression: Placeholder text: [Dates in YYYY-YYYY format]
 - Date Type: Select Inclusive Dates
 - Extents Portion: Select Whole
 - Extents Number: Placeholder test: [number of units in the extent statement--numerals only]
 - Finding Aid Data : EAD ID: [Institution’s OCLC code , e.g. opu_]
 - Finding Aid Data : EAD Location:
<http://archiveswest.orbiscascade.org/findaid/ark:/80444/xv>[fill in five-digit ARK here]
 - Finding Aid Data : Description Rules: Describing Archives: A Content Standard
 - Finding Aid Data : Language of Description: Finding aid written in English.

- Notes:
 - Abstract
Placeholder text: [Note to be added here]
 - Biographical/ Historical
Placeholder text: [Note to be added here]
 - Scope and Contents
Placeholder text: [Note to be added here]
 - Conditions Governing Access
Default text: Collection is open for research.
 - Conditions Governing Use
Default text: Placeholder text: [Add your repository's default copyright language, or enter Note to be added here.]

The institution's System Administrator then may choose to set the following Default Values for the repository:

- Accession :
 - Identifier: [Fill out with standard local prefix(es), e.g. "ACC", if you use the same one for all accessions]
 - Acquisition Type: [Select the most common type, e.g. Gift]
 - Resource Type: [Select "Collection" or other entry as the default]
 - Use Restrictions Note: [If your institution has a standard default copyright notice that is used for most of your accessions, you may enter it here.]
- Resource
 - Finding Aid Data : [Finding Aid Date] [Optionally, enter the current year, e.g. 2017. Note that you'll have to update this entry each year.]
 - (if applicable) Preferred Citation: Default text: Enter your repository's default citation form, e.g.: [Collection Title], Acme University Archives, Seattle, Washington.
 - Add to any other note field that you use routinely: [Note to be added here.]
 - **Do not add labels to the Notes; those are supplied by the stylesheet**

Setting Default Values: For Multiple Repositories

The Alliance will set Default Values for your first repository as follows:

- Accession
 - Title: Placeholder text: [Title here]
 - Content Description: Placeholder text: [Description here]
 - Publish?: Leave unchecked
 - Date Label: Select Creation
 - Date Expression: Placeholder text: [Dates in YYYY-YYYY format]
 - Date Type: Select Inclusive Dates
 - Extents Portion: Select Whole
 - Container Summary: Placeholder text: [Describe boxes, items, etc. here]
- Resource
 - Level of Description: Select Collection
 - Language: English
 - Dates Label: Select Creation
 - Date Expression: Placeholder text: [Dates in YYYY-YYYY format]
 - Date Type: Select Inclusive Dates

- Extents Portion: Select Whole
- Extents Number: Placeholder text: [number of units in the extent statement]
- Finding Aid Data : EAD ID: [Institution's OCLC code) , e.g. opu_]
- Finding Aid Data : EAD Location:
<http://archiveswest.orbiscascade.org/findaid/ark:/80444/xv>[fill in five-digit ARK here]
- Finding Aid Data : Description Rules: Select Describing Archives: A Content Standard
- Finding Aid Data : Language of Description: Finding aid written in English.
- Notes:
 - Abstract
Placeholder text: [Note to be added here]
 - Biographical/ Historical
Placeholder text: [Note to be added here]
 - Scope and Contents
Placeholder text: [Note to be added here]
 - Conditions Governing Access
Default text: Collection is open for research.
 - Conditions Governing Use
Default text: Placeholder text: [Add your repository's default copyright language, or enter Note to be added here.]

The institution's System Administrator should set up any **additional** repositories with the following Default Values:

- Accession
 - Title: Placeholder text: [Title here]
 - Content Description: Placeholder text: [Description here]
 - Publish?: Leave unchecked
 - Date Label: Select Creation
 - Date Expression: Placeholder text: [Dates in YYYY-YYYY format]
 - Date Type: Select Inclusive Dates
 - Extents Portion: Select Whole
 - Container Summary: Placeholder text: [Describe boxes, items, etc. here]
- Resource
 - Level of Description: Select Collection
 - Language: English
 - Dates Label: Select Creation
 - Date Expression: Placeholder text: [Dates in YYYY-YYYY format]
 - Date Type: Select Inclusive Dates
 - Extents Portion: Select Whole
 - Extents Number: Placeholder test: [number of units in the extent statement]
 - Finding Aid Data : EAD ID: [Institution's OCLC code , e.g. opu_]
 - Finding Aid Data : EAD Location:
<http://archiveswest.orbiscascade.org/findaid/ark:/80444/xv>[fill in five-digit ARK here]
 - Finding Aid Data : Description Rules: Select Describing Archives: A Content Standard
 - Finding Aid Data : Language of Description: Finding aid written in English.
 - Notes:
 - Abstract
Placeholder text: [Note to be added here]
 - Biographical/ Historical
Placeholder text: [Note to be added here]

- Scope and Contents
Placeholder text: [Note to be added here]
- Conditions Governing Access
Default text: Collection is open for research.
- Conditions Governing Use
Default text: Placeholder text: [Add your repository's default copyright language, or enter Note to be added here.]

The institution's System Administrator then may choose to set the following Default Values for its repositories:

- Accession:
 - Identifier: [Fill out with standard local prefix(es), e.g. "ACC", if you use the same prefix for all accessions]
 - Acquisition Type: [Select the most common type, e.g. Gift]
 - Resource Type: [Select "Collection" or other entry as the default]
 - Use Restrictions Note: [If your institution has a standard default copyright notice that is used for most of your accessions, you may enter it here.]
- Resource:
 - Finding Aid Data: [Finding Aid Date] [Optionally, enter the current year, e.g. 2017. Note that you'll have to update this entry each year.]
 - (if applicable) Preferred Citation: Default text: Enter your repository's default citation form, e.g.: [Collection Title], Acme University Archives, Seattle, Washington.
 - For any other notes that your institution uses regularly: [Note to be added here.]
 - **Do not add labels to the Notes; those are supplied by the stylesheet**

Rapid-Data Entry Templates

Customized templates can be created for rapid data entry of components such as Files or Series within Resource Records. See detailed directions: [Entering Child Elements through Rapid Data Entry](#)

Public Portal Settings

Turning the Public Portal on/off

The public portal for AS may be disabled if desired. Disabling it may improve the speed and performance of your instance. To do so, contact the ULC Program Manager with your request.

Changing the logo, styles, or text of the Public Portal

Logos, fonts, and text for your Public Portal are set through the back-end of AS, rather than through the browser interface. Please note: The Alliance is providing limited support for the public portal of AS. Archives West continues to be the primary portal for researchers for the Alliance's Archives & Manuscript Collections Service.

- For Alliance Hosted instances: To make changes to your Public Portal such as logo changes or updates to the text on your public portal's home page, contact the ULC Program Manager with your request if you don't have System Administrator permissions. If you have System Administrator permissions, you can make the changes yourself.

- For Non-Hosted instances: You will need to contact your IT support person and then follow the instructions at: <https://archivesspace.github.io/archivesspace/user/configuring-archivesspace/>

Log Files

ArchivesSpace has several different levels of logging: debug, info, warn, error, and fatal.

[Contact the Program Manager](#) about getting log files from LibraryHost.

Appendix I

Repository Records- Alliance Set Up

Field Name	Directions
Repository Short Name	Alliance set-up
Repository Name	Alliance set-up
Organization / Agency Code	Alliance set-up
Parent Institution Name	Enter your parent institution, if any. Example: Acme University
Country	Alliance set-up
Home Page URL	Enter a link to your repository's home page. Example: <code>https://archives.acme.edu</code>
Branding Image URL	Optionally, provide a link to a logo file for your repository. The logo should be online and start with <code>http://</code> or <code>https://</code> . Example: <code>https://archives.acme.edu/images/logo.gif</code>
Contact Name	Recommended: Enter a title rather than a personal name, so that the name will continue to be valid even with staff turnover. Example: Acme University Archivist
Address fields	Enter your repository's mailing address. Example: Omega Library Smithtown ID United States 83701
Telephone numbers	Enter one or more telephone/fax/etc. numbers here by clicking on the "Add Telephone Number" button.
Email	Enter an email address. Recommended: Enter a departmental email rather than a personal email. Example: <code>archives@acme.edu</code>

Email Signature	Optional
Contact Notes	Optional

Appendix II

Repository Record- Additional Records

Field Name	Directions
Repository Short Name	Enter a shortened version of your repository name. This will only be used internally within the AS application and will not be published into any outputs. Example: Acme Archives
Repository Name	Enter the full name of your repository as you wish it to appear on any outputs. This should match the name of the repository in the Archives West repository registry. Example: Acme University Archives & Special Collections
Organization / Agency Code	Enter your MARC organization code in lower case without dashes. See https://www.loc.gov/marc/organizations/ . If your first repository has the same MARC code, it's fine to use it again; if you have a separate one, use it. Example: orfp
Parent Institution Name	Enter your parent institution, if any. Example: Acme University
Country	Select your country
Home Page URL	Enter a link to your repository's home page. Example: https://archives.acme.edu
Branding Image URL	Optionally, provide a link to a logo file for your repository. The logo should be online and start with http:// or https://. Example: https://archives.acme.edu/images/logo.gif Note: If you include this you may need to edit it out of the XML before uploading your EAD to Archives West.
Contact Name	Recommended: Enter a title rather than a personal name, so that the name will continue to be valid even with staff turnover. Example: Acme University Archivist
Address fields	Enter your repository's mailing address. Example: Omega Library Smithtown ID United States 83701

Telephone numbers	Enter one or more telephone/fax/etc. numbers here by clicking on the “Add Telephone Number” button.
Email	Enter an email address. Recommended: Enter a departmental email rather than a personal email. Example: archives@acme.edu
Email Signature	Optional
Contact Notes	Optional

Appendix III

Global Preferences

Field Name	Notes & Recommendations
General Settings: Show Suppressed	Default: Leave unchecked Institution may choose to modify. Turning on this option will allow users of your AS administrative portal to see suppressed records. If it is left unchecked, suppressed records are not visible.
General Settings: Publish?	Default: Leave unchecked Institution may choose to modify. Turning on this option will cause the “Publish?” checkbox in each individual record to be checked by default at the point when you create a new record. This means that unless your data entry users manually uncheck the “Publish?” checkbox in an Accession or Resource (or other) record, that record will automatically publish itself to your public AS portal when the record is saved. Note that this preference setting only applies to new records; it does not retroactively affect records that are already created.
General Settings: Pre-Populate Records	Default: Checked Institution should not modify. Turning on this option will allow settings from the “Edit Default Values Tool” to pre-populate fields in records. Normally you would want to keep this turned on, so that defaults set by administrators work for data entry users. Note that this preference setting only applies to new records; it does not retroactively affect records that are already created, nor does it affect records spawned from previously existing records. See Pre-Populating Fields for more information.
Accession Browse Columns 1-5	Default: Include Identifier and Accession Date Institution may choose to modify.
Resource Browse Columns 1-5	Default: Include Identifier Institution may choose to modify.
Digital Object Browse Columns 1-5	Default: Include Identifier Institution may choose to modify.

Note Order (available in v. 1.5+)	<p>Default: As above Institution may choose to modify note order.</p> <p>If there are additional fields that you use all or most of the time, you may want to drag and drop them closer to the top of the list.</p>
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Appendix IV

Repository Preferences

Field Name	Notes & Recommendations
General Settings: Show Suppressed	<p>Default: Leave unchecked Institution may choose to modify. Turning on this option will allow users of your AS administrative portal to see suppressed records. If it is left unchecked, suppressed records are not visible.</p>
General Settings: Publish?	<p>Default: Leave unchecked Institution may choose to modify. Turning on this option will cause the “Publish?” checkbox in each individual record to be checked by default at the point when you create a new record. This means that unless your data entry users manually uncheck the “Publish?” checkbox in an Accession or Resource (or other) record, that record will automatically publish itself to your public AS portal when the record is saved. Note that this preference setting only applies to new records; it does not retroactively affect records that are already created.</p>
General Settings: Pre-Populate Records	<p>Default: Checked Institution should not modify. Turning on this option will allow settings from the “Edit Default Values Tool” to pre-populate fields in records. Normally you would want to keep this turned on, so that defaults set by administrators work for data entry users. Note that this preference setting only applies to new records; it does not retroactively affect records that are already created, nor does it affect records spawned from previously existing records. See Pre-Populating Fields for more information.</p>
Accession Browse Columns 1-5	<p>Default: Include Identifier and Accession Date Institution may choose to modify.</p>
Resource Browse Columns 1-5	<p>Default: Include Identifier Institution may choose to modify.</p>
Digital Object Browse Columns 1-5	<p>Default: Include Identifier Institution may choose to modify.</p>
Note Order (available in v. 1.5+)	<p>Default: As above Institution may choose to modify note order.</p>

If there are additional fields that you use all or most of the time, you may want to drag and drop them closer to the top of the list.

Appendix V

Controlled Values

Field Name	Recommended Action
Accessions Acquisition Type	Suppress values that your institution does not wish to include.
Accession Parts Relator	Suppress values that your institution does not wish to include.
Accession Resource Type	<p>Suppress values that your institution does not wish to include.</p> <ul style="list-style-type: none"> You may set the default to the most common type of collection in your repository, e.g. Collection or Records. If you have a predominant resource type (e.g. papers, records, collection), move it to position 0. If you have a common type that does not appear (e.g. Photographs), add it.
Accession Sibling Relator	No action recommended.
Accession Sibling Relator Type	No action recommended.
Agent Contact Salutation	Suppress values that your institution does not wish to include.
Agent Relationship Associative Relator	No action recommended.
Agent Relationship Earlierlater Relator	No action recommended.
Agent Relationship Parentchild Relator	No action recommended.
Agent Relationship Subordinatesuperior Relator	No action recommended.
Archival Record Level	<p>Suppress values that are never used by your repository, e.g. fonds, subfonds.</p> <ul style="list-style-type: none"> Does your institution describe <i>everything</i> at the collection level? Series level? Item level? Set that default here. If the default does not apply to a particular collection, the other options are still available unless you have suppressed them. Does your institution use just one or two levels? Set them to Position 0 and 1.

Collection Management Processing Priority	No action recommended.
Collection Management Processing Status	No action recommended.
Container Location Status	No action recommended.
Container Type	<p>Suppress values that are not used by your repository.</p> <ul style="list-style-type: none"> • We also recommend choosing to keep <i>only</i> the plural or singular form of container types, as the system sees “box” and “boxes” as two completely different containers. If you already have records with duplicative container types, consider merging the types together. • Does your institution use only one type of container? Set that as the default here. If the default does not apply, the other options are still available unless you have suppressed them. • Does your institution use one or two container types most of the time? Set them to Position 0 and 1.
Country ISO 3166	If a country other than the United States is predominant in your repository, make it the default. Or if you have several that are predominant, move those to the top of the list.
Date Calendar	If you routinely use something other than the Gregorian calendar, or if the order of options doesn't reflect your needs, modify.
Date Certainty	If the order of options doesn't reflect your needs, modify.
Date Era	If you routinely use ce, set as default.
Date Label	If the order of options doesn't reflect your needs, modify.
Date Type	Move Inclusive to Position 0, do not modify.
Deaccession Scope	No changes recommended.
Digital Object Digital Object Type	If the order of options doesn't reflect your needs, modify. Set a default if applicable.
Digital Object Level	If the order of options doesn't reflect your needs, modify.
Dimension Units	If the order of options doesn't reflect your needs, modify.
Event Event Type	<p>Suppress values that your institution does not wish to include.</p> <ul style="list-style-type: none"> • If an Event type is mostly what you will use, move it to position 0. • If desired, add any new “Events” that your institution wishes to track. • If you track only one type of Event, make it the default.
Extent Extent Type	<p>Suppress values that your institution does not wish to use.</p> <ul style="list-style-type: none"> • For example, if your institution uses Linear Feet rather than

	<p>Cubic Feet, suppress Cubic Feet in order to avoid confusion during data entry.</p> <ul style="list-style-type: none"> • If you have a predominant extent type (e.g. linear feet vs. cubic feet), set as default or move to position 0. • Also, choose to keep <i>only</i> the plural or singular form of extent types, as the system sees “linear feet” and “linear foot” as two completely different units. If you already have singular & plural versions of the same unit type, consider merging them. Consider doing the same for slight variations (e.g. Linear Feet/Linear feet/linear feet).
Extent Portion	No changes recommended.
File Version Checksum Methods	If the order of options doesn’t reflect your needs, modify. Set a default if applicable.
File Version File Format Name	If the order of options doesn’t reflect your needs, modify. Set a default if applicable.
File Version Use Statement	If the order of options doesn’t reflect your needs, modify. Set a default if applicable.
File Version Xlink Actuate Attribute	No changes recommended.
File Version Xlink Show Attribute	No changes recommended.
Instance Instance Type	<p>Suppress values that your institution does not wish to use, e.g. “Text.”</p> <ul style="list-style-type: none"> • Note: Though setting one of these values as the default is tempting, you should not do this because it may cause AS to <i>add empty instance elements</i> to records where you do not necessarily want them to occur.
Language ISO 639-2	If a language other than English is predominant in your repository, make it the default. Or if you have several that are predominant, move those to the top of the list.
Linked Agent Archival Record Relators	If the order of options doesn’t reflect your needs, modify. Set a default if applicable.
Linked Agent Event Roles	If the order of options doesn’t reflect your needs, modify. Set a default if applicable.
Linked Agent Role	If the order of options doesn’t reflect your needs, modify. Set a default if applicable.
Linked Event Archival Record Roles	No changes recommended.
Local Access Restriction Type	<p>Suppress values that your institution does not wish to use.</p> <p>If the order of options doesn’t reflect your needs, modify. Set a default if applicable.</p>

Location Function Type	Suppress values that your institution does not wish to use. If the order of options doesn't reflect your needs, modify. Set a default if applicable.
Location Temporary	If desired, add other temporary locations and/or suppress the default values that do not apply to your repository.
Name Person Name Order	Do not modify from Alliance settings. Should be set to inverted.
Name Rule	Suppress values that your institution does not wish to use. If the order of options doesn't reflect your needs, modify. Set a default if applicable.
Name Source	Suppress values that your institution does not wish to use. If the order of options doesn't reflect your needs, modify.
Note Bibliography Type	No changes recommended.
Note Digital Object Type	Suppress values that your institution does not wish to use. If the order doesn't reflect your needs, modify.
Note Index Item Type	Suppress values that your institution does not wish to use. If the order of options doesn't reflect your needs, modify.
Note Index Type	No changes recommended.
Note Multipart Type	If the order of options doesn't reflect your needs, modify.
Note Orderedlist Enumeration	No changes recommended.
Note Rights Statement Act Type	If the order of options doesn't reflect your needs, modify.
Note Rights Statement Type	No changes recommended.
Note Singlepart Type	No changes recommended.
Resource Finding Aid Description Rules	Set to DACS, do not change.
Resource Finding Aid Status	<ul style="list-style-type: none"> ● Suppress values that your institution does not wish to use. ● If the order of options doesn't reflect your needs, modify. ● Set a default if applicable. ● If you have a common value that does not appear add it.
Resource Resource Type	<ul style="list-style-type: none"> ● You may set the default to the most common type of collection in your repository, e.g. Collection or Records. ● If you have a predominant resource type (e.g. papers, records, collection), move it to position 0. ● If you have a common type that does not appear (e.g. Photographs), add it.
Rights Statement Act Restriction	No changes recommended.
Rights Statement Act Type	<ul style="list-style-type: none"> ● Suppress values that your institution does not wish to use. ● If the order of options doesn't reflect your needs, modify.

	<ul style="list-style-type: none"> • Set a default if applicable.
Rights Statement External Document Identifier Type	<ul style="list-style-type: none"> • Suppress values that your institution does not wish to use. • If the order of options doesn't reflect your needs, modify. • Set a default if applicable.
Rights Statement IP Status	<ul style="list-style-type: none"> • Suppress values that your institution does not wish to use. • If the order of options doesn't reflect your needs, modify. • Set a default if applicable.
Rights Statement Other Rights Basis	<ul style="list-style-type: none"> • Suppress values that your institution does not wish to use. • If the order of options doesn't reflect your needs, modify.
Rights Statement Rights Type	<ul style="list-style-type: none"> • Suppress values that your institution does not wish to use. • If the order of options doesn't reflect your needs, modify.
Subject Source	<ul style="list-style-type: none"> • Add Archives West browsing terms with source as "archiveswest" and set to position 0, do not modify this. • Suppress values that your institution does not wish to use. • If the order of options doesn't reflect your needs, modify. • Set a default if applicable.
Subject Term Type	<ul style="list-style-type: none"> • Suppress values that your institution does not wish to use. • If the order of options doesn't reflect your needs, modify.
Telephone Number Type	<ul style="list-style-type: none"> • Suppress values that your institution does not wish to use. • If the order of options doesn't reflect your needs, modify. • Set a default if applicable.
User Defined Enum 1-4	<p>If you would like to define special fields for local purposes, enter controlled values for the four user-defined drop-down menu fields here.</p> <p><i>Caution:</i> User-defined fields are likely to complicate future migrations. Create them only when a system-defined field can't possibly do.</p>