

Create and Link Top Containers via Spreadsheet

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Introduction

Beginning with ArchivesSpace 3.0.0, you can create Top Containers and link them to existing Archival Objects within a Resource using a spreadsheet. You can also link existing Top Containers to Archival Objects. A single spreadsheet may contain both kinds of links. A spreadsheet can link only to Archival Objects within a single Resource.

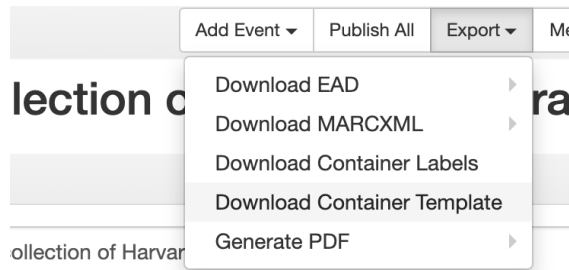
An existing Top Container **cannot** be changed by the process, including by adding Container Profile or a Location.

An Archival Object **cannot** be changed by this process, other than the creation of a new container instance.

Process

Download

Display the desired Resource record and choose “Download Container Template” from the Export action button.



Edit

1. Open the downloaded CSV file in Excel or a similar application.
 - a. The top four rows of the spreadsheet provide context. Leave them alone.
 - b. Below those is one row for every Archival Object in the Resource. The downloaded file DOES NOT include validation dropdowns. If that would help you, you may want to add them before beginning editing.
 - c. Columns B-H are prepopulated with information about an Archival Object and the Resource. Most of these are for your reference. Of these columns, only the Archival Object ID is used during the upload. Leave these columns as is.

	B	C	D	E	F	G	H
1							
2	Archival Object	Archival Object	Archival Object	Archival Object	Resource	Resource	Resource
3	archival_object_id	ref_id	component_id	archival_object_title	resource_title	ead_id	identifier
4	Archival Object ID	Ref ID	Component ID	Title	Resource Title	EAD ID	Identifier
10	1809310	law00066c00002 1-1 to 1-4	57 uncaptioned photos of Russian refugee immigrants sent to the U.S. by the <corpname>American Red Cross,</corpname> n.d.		Charles Claflin Davis papers	law00066	HOLLIS8872753

2. Add necessary information about containers and instances in columns I-R.

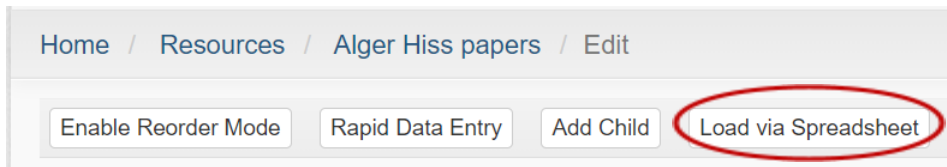
	I	J	K	L	M	N	O	P	Q	R
1										
2	Instance	Container	Top Container	Top Container	Top Container	Top Container	Sub Container	Sub Container	Sub Container	Location
3	instance_type	top_container_id	top_container_type	top_container_indicator	top_container_barcode	container_profile_id	child_type	child_indicator	child_barcode	location_id
	Instance Type	Top Container ID (existing top container, leave blank if creating new container)	Top Container Type	Top Container Indicator	Top container barcode	Container Profile ID	Child Type	Child Indicator	Child Barcode	Location ID
4										
10										

- Columns I-R will be blank in the downloaded file. This is true even for Archival Objects that have container instances. You can add a container instance via this process, but not change or delete existing ones.
- To the rows for Archival Objects to which you want to link containers, you **must** supply EITHER the database record identifier of an existing Top Container OR the information needed to create a new Top Container. New Top Containers require a valid Container Type and a Container Indicator. See the Column Definitions table below for details. When linking a new container to multiple Archival Objects, copy the new Top Container field values into all the applicable rows.
- To the rows for Archival Objects to which you want to link containers, you must also supply a valid Instance Type. See the Column Definitions table below for details.
- You may also supply optional information about the Top Container and Child Container: Top Container Barcode, Container Profile ID, Location ID, Child Type, Child Indicator, and Child Barcode.
- Delete all the rows for Archival Objects that will not be linked to a Top Container.
- Save the file as Excel or CSV.

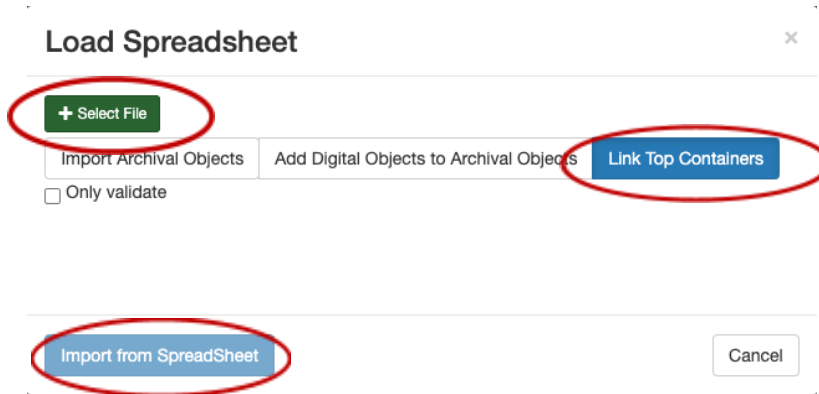
Upload

Upload the edited file.

- Display the Resource in Edit mode.
- Select "Load via Spreadsheet"



- c. In the pop-up window 1) choose Select File to upload your file and then 2) choose Link Top Containers, followed by 3) Import from Spreadsheet.



- d. When the process is complete, the BackGround Jobs displays any errors that may have occurred, or if no errors occurred it will show the records that have been modified. Clicking on the record will show the containers that have been created and linked.

Column Definitions

Below is an explanation of each column in the spreadsheet.

For columns where the value is from a Controlled Value List, you must enter the **Value** (NOT the Translation). It must be entered **exactly** as it is written (lower case vs. title case, etc.).

Context	Column	Notes	Requirement	Example
Archival Object	Archival Object ID	The database record number for the archival object to which a container should be linked.	Required, supplied in the downloaded file.	1809305
Archival Object	Ref ID		Supplied in the downloaded file.	law00066c00001
Archival Object	Component ID	Component Unique Identifier. For reference only. Not used by the uploader.	Supplied in the downloaded file.	2-3
Archival Object	Title	For reference only. Not used by the uploader	Supplied in the downloaded file.	
Resource	Resource Title	For reference only. Not used by the uploader.	Supplied in the downloaded file.	
Resource	EAD ID		Supplied in the downloaded file.	law00066
Resource	Identifier	The value of the Identifier field in the Resource record. For reference only. Not used by the uploader.	Supplied in the downloaded file.	LAW MMS 283
Instance	Instance Type	Must be entered in the form of a Value from the instance_instance_type controlled value list. Do NOT use the Translation.	Required	mixed_materials
Top Container	Top Container ID	The database record number of an existing top container. Leave blank if creating this as a new container via this spreadsheet load.	Required to reference an existing Top Container	93366

Top Container	Top Container Type	Must be entered in the form of a Value from the container_type controlled value list. Do NOT use the Translation.	Required to create a new Top Container	box
Top Container	Top Container Indicator		Required to create a new Top Container	23
Top Container	Top Container Barcode		Optional	AH36KV
Top Container	Container Profile ID	The database record number of an existing container profile.	Optional	144
Sub-Container	Child Type	Must be entered in the form of a Value from the container_type controlled value list.	Optional	folder
Sub-Container	Child Indicator		Optional	7
Sub-Container	Child Barcode	Note: Will not be validated against the database for uniqueness	Optional	HB3Q28
Location	Location ID	The database record number of an existing Location record to be linked to a new Top Container.	Optional	13

Error Conditions

The process validates both the spreadsheet and the database for a variety of possible errors:

Based on the spreadsheet:

- Archival Object database number is absent. (It will be in the download file, but could have been cleared accidentally)
- Instance Type is absent.
- Neither Top Container database number nor Top Container Indicator is present
- Both Top Container database number AND Top Container Indicator are supplied

Based on the database:

- Top Container Barcode already exists in the system
- Supplied Location record number cannot be found in the system

- Supplied Container Profile record number cannot be found in the system
- Archival object record number cannot be found in the system
- A combination of Container Type and Container Indicator in the spreadsheet already exists for a Top Container within the resource.

If any of the above validations fail, the entire batch will fail. A detailed note will appear in the Background Jobs page with the reason for failure.