

Background for Agents testing for ArchivesSpace 3.0.0

Testing server: <http://aspace-anw-429.lyrtech.org/staff/> (admin/admin)

Branch (for people who want to create their own instance):
<https://github.com/archivesspace/archivesspace/tree/ANW-429>

Testing spreadsheet:
<https://docs.google.com/spreadsheets/d/1Nvt1J8HDHl78e2Wb7pyGJh6QX9dwDnYWhO3-8rmBdS8/edit?usp=sharing>

Primary goals of Agents module expansion:

- Greater compliance with metadata standards used to describe persons, families, and corporate entities i.e. MARCXML authority and EAC-CPF.
- Facilitate better exchange with databases like LCNAF and SNAC that use these standards by being able to record the information about agents that they require.
- Provide for better contextualization of agents by providing more ways to apply controlled access headings or information about the agent and their relationships.

Note: even though this expansion adds considerably to the possibilities for recording information about agents and their relationships, the requirements to make a valid agent remain minimal: an agent type and one Name Form sub-record. (Requirement for Source/Rules has been relaxed to reflect different ways this information is being captured in the new schema.) Some sub-records have requirements to make the sub-record valid, but the sub-records themselves are not required.

What's new or improved

Many changes to the Agent record form/schema

(note: there are tooltips for these sub-records and new fields if you mouse over them; user manual documentation will be coming in the process of finishing up the release)

An Agent record form is now divided into five sections (still all on one page). Each contains a set of sub-records. The sections are not sub-records themselves.

- Basic Information

- Record Control Information
- Identity Information
- Description Information
- Relation Information

Basic Information: this section is used to indicate the agent type and whether the agent is published or not.



The screenshot shows a web form titled "New Person" with a "Save" button in the top left corner. A small "Agent" label is positioned to the right of the title. Below the title is a section header "Basic Information". Under this header, there are two fields: "Agent Type" with the value "Person" and "Publish" with an unchecked checkbox. A help icon (?) is located in the top right corner of the form area.

Record Control Information: this section contains information about the record itself, with the expectation that it originated outside of ArchivesSpace or is going to be shared with a system other than ArchivesSpace.

Record Control Information	
Record IDs	Add Record ID ?
Record Info	Add Record Info ?
Other Agency Codes	Add Agency Code ?
Convention Declarations	Add Convention Declaration ?
Maintenance History	Add Event ?
Sources	Add Source ?
Alternate Sets	Add Alternative Set ?

New sub-records:

- Record IDs
- Record Info
- Other Agency Codes
- Convention Declarations
- Maintenance History
- Sources
- Alternate Sets

Identity Information: this section is the core information about the agent him/her/themselves. Name Form is the only required sub-record in an Agent record.

The screenshot shows a web interface for 'Identity Information'. It has two main sections: 'Entity IDs' and 'Name Forms'. The 'Entity IDs' section has an 'Add Entity ID' button. The 'Name Forms' section has an 'Add Name Form' button and a help icon. Below these is a table with two columns: 'Authorized' and 'Display Name'. The table has three rows: 'Authority ID' with a text input field, 'Source' with a dropdown menu, and a third row with a text input field. There is a close button (X) in the top right corner of the table area.

New sub-records:

- Entity IDs

New fields in existing sub-records

Name Form

- Person:
 - Language
 - Script
 - Transliteration
 - Parallel Names sub-record
- Family:
 - Family Type
 - Location
 - Language
 - Script
 - Transliteration
 - Parallel Names sub-record
- Corporate Entity
 - Location
 - Conference Meeting?
 - Jurisdiction?
 - Language
 - Script
 - Transliteration
 - Parallel Names sub-record
- Software:
 - Language

- Script
- Transliteration
- Parallel Names sub-record

Change to existing subrecord/fields

Dates of Existence

- New structure to provide for standardized dates and begin/end dates of expression
- Please note that because of numerous requests, Dates of Existence is now added to the display name for the agent if there is no entry in the Dates field for the name form indicated to be the Display Name. If this is not desired for an individual agent, uncheck Automatically generate for the Sort Name for that agent.

Sort Name *	Adams, Ansel
☐ Automatically generate	

Description Information: this section provides for further descriptive information about the agent, including controlled access terms that describe the agent.

Description Information

Dates of Existence Add Date Set ?

Gender Add Gender Info

Places Add Place

Occupations Add Occupation

Functions Add Function

Topics Add Topic

Languages Add Language

New sub-records:

- Gender – this is a configurable value list; ArchivesSpace will ship with no values but an indication of some possible externally derived controlled vocabularies
- Places – geographic subject terms related to the agent such as place of birth, residence
- Occupations – occupation subject terms related to the agent
- Functions – function subject terms related to the agent
- Topics – topical subject terms related to the agent
- Languages – controlled value languages and notes related to languages used by or associated with the agent

Change to existing fields in sub-records:

Contact Details

- Contact notes now a full repeatable sub-record with fields for Persistent ID, Date of Contact (text, not date), and Contact Notes to give more structure

Dates of Existence

- New structure to provide for standardized dates and begin/end dates of expression

More Notes and subnotes

Person

- Biographical/Historical (subnotes: Abstract, Chronology, Citation, Defined List, Ordered List, Outline, Text)
- General Context (subnotes: Defined List, Ordered List, Outline, Text)

Family

- Biographical/Historical same as Person
- General Context same as Person
- Structure or Genealogy (subnotes: Defined List, Ordered List, Outline, Text)

Corporate Entity

- Biographical/Historical same as Person
- General Context same as Person
- Legal Status (subnotes Citation, Text)
- Mandate (subnotes Citation, Text)
- Structure or Genealogy same as Family

Software

- Biographical/Historical same as Person
- General Context same as Person

Relation Information: this section is used to indicate relationships to other agents or materials inside or outside ArchivesSpace.

Relation Information

Related External Resources

Add Related External Resource

Related Agents

Add Related Agent ?

Save Person +1

Cancel

New sub-records:

- Related External Resources

Changes to existing sub-records:

- Additional relationships in Related Agents

Imports and Export Changes - Note: Changes from Round 1 of testing have not yet been implemented for Round 2. Please do not test.

New MARCXML authority import and export

(see

<https://docs.google.com/spreadsheets/d/1gHxjB0A4mrX82--SLIKA4pAck7hILNEKt3ldc9SOMDg/edit?usp=sharing> for mapping)

New Background Job — Import Data Background Job

Import Type * MarcXML Authority (Agents)

Import ☐

Maintenance

Events?

+ Add file

+ Drag and drop files here

Start Job Cancel

Save Add Event Download EAC-CPF View Published Download MARCXML Authority Merge Delete

Adams, Abigail (1744-1818) Agent ?

Updated import/export maps for agents

(see

<https://docs.google.com/spreadsheets/d/14LNkFb3KF89qTtU1FpnkYRCoPUu7E2NoHc9wKwfpT-o/edit?usp=sharing> for EAC-CPF mappings)

- EAC-CPF export
- EAC-CPF import
- LCNAF plugin when importing agents (uses new MARCXML authority mapping)

Added functionality in agent merge

- When comparing two agents, you can choose to selectively add or replace more fields and sub-records and move around sub-records to make it clear what should replace what.

Additional information on agents in public user interface

(related JIRA: <https://archivesspace.atlassian.net/browse/ANW-663>)

Larsen, Nella, 1891-1964

Person

Dates

- Existence: 1891-04-13 - 1964-03-30

Biography

Nella Larsen, Harlem Renaissance writer, librarian and nurse. She was born in Chicago in 1893 to a white Danish mother and a black West Indian father. Two years later, after her father died, her mother married a Dane. Educated in Chicago, at sixteen Larsen travelled to Denmark and remained for three years. After a year of study at Fisk University, she attended the University of Copenhagen, and later returned to the United States where she graduated from the Lincoln Hospital Training Program in New York (1915). Larsen married Elmer S. Imes, an African American physicist in 1919, and became associated with the cultural awakening in Harlem, known as the Harlem Renaissance. From 1921-1926 she worked as a children's librarian at the 135 Street Branch of the New York Public Library. Larsen's first short story was published in 1926, and her two novels quickly followed: "Quicksand" (1928) and "Passing" (1929). The following year she became the first African American woman to win a Guggenheim award for creative writing. Her books are autobiographical in nature, dealing with identity and marginality and explore the consciousness and psychology of female character. An unsubstantiated charge of plagiarism and her divorce in 1933 ended Larsen's career as one of the Harlem Renaissance's major novelists. Her nursing career began in 1941 and she worked as a nurse in several hospitals in Brooklyn and Manhattan. Larsen died in relative obscurity in 1964. From the description of Nella Larsen Letters, 1928. (New York Public Library). WorldCat record id: 122517298

Gender

- Females

Topics

- Women authors

Social Networks and Archival Context (SNAC) Identifier

- <http://n2t.net/ark:/99166/w6kf2mxw>

Staff Only

More about 'Larsen, Nella, 1891-1964'

Name Forms

Also known by the following names:

- Larsen, Nellalitea, 1891-1964, 1891-1964
- Imes, Nella, 1891-1964, 1891-1964
- ラーセン, ネラ, 1891-1964, 1891-1964
- Larsen, Nellie, 1891-1964, 1891-1964
- Walker, Nellie, 1891-1964, 1891-1964
- Larsen, Nellye, 1891-1964, 1891-1964

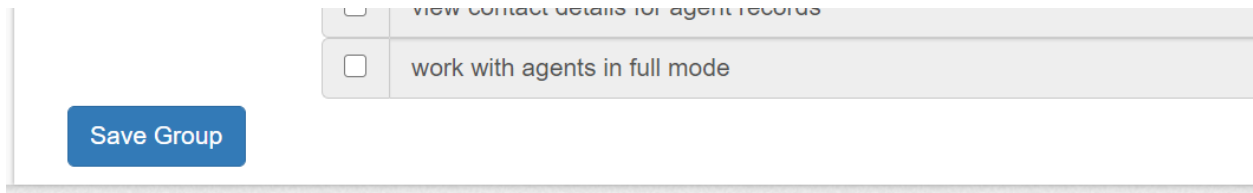
Related External Resources

- James Weldon Johnson and Grace Nail Johnson papers, circa 1850-2005, 1900-1976
- Nella Larsen Letters, 1928
- Johnson, James Weldon, 1871-1938. James Weldon Johnson and Grace Nail Johnson papers, circa 1850-2005 (bulk 1900-1976).
- Braithwaite, William Stanley, 1878-1962. William Stanley Braithwaite collection, 1899-1939.
- Peterson, Dorothy. Dorothy Peterson collection, 1919-1966.
- Dorothy Peterson collection, 1919-1966
- Peterson, Dorothy. Dorothy Peterson collection, 1919-1966

Agents “Light” mode

Light mode gives system administrators and users the flexibility to see a streamlined view of Agent records.

- Full mode displays all Agent sub-records; Light is a smaller subset of sub-records. It is mainly what was in an agent record prior to the expansion of the module, but includes some sub-records that have been frequently requested like Entity IDs.
- The "add and edit extended agent attributes" permission determines whether Full mode is available to a permission group (and thus a user in the permission group). All admin users have this permission.

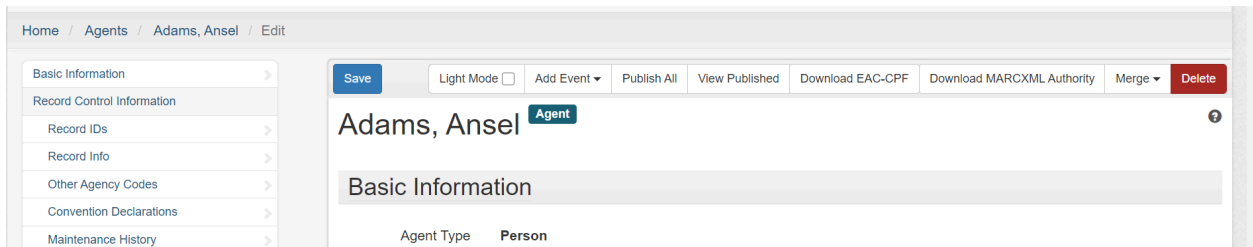


A screenshot of a permission settings interface. It shows two rows of checkboxes. The first row has a checked checkbox and the text "view contact details for agent records". The second row has an unchecked checkbox and the text "work with agents in full mode". Below these rows is a blue button labeled "Save Group".

Aside from Contact Details, all data in an Agent record is viewable in View mode, regardless of permissions.

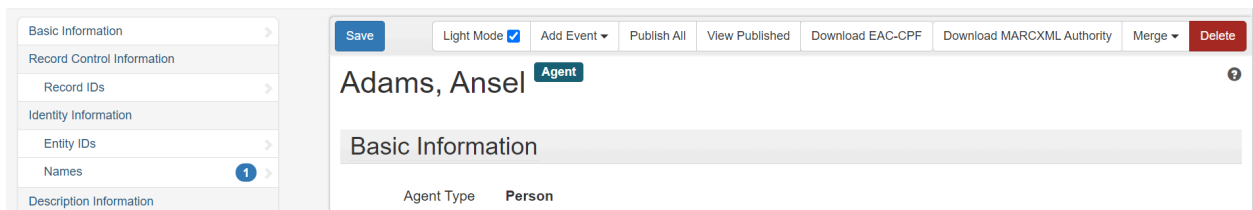
Users with permission to work with agents in Full mode can use the toggle on the toolbar to turn Light mode on and off.

Full mode:



A screenshot of the Agent record page for "Adams, Ansel" in Full mode. The left sidebar shows a list of sub-records: Basic Information, Record Control Information, Record IDs, Record Info, Other Agency Codes, Convention Declarations, and Maintenance History. The main content area shows the "Basic Information" sub-record, which includes the "Agent Type" field set to "Person". The toolbar at the top includes buttons for Save, Light Mode (unchecked), Add Event, Publish All, View Published, Download EAC-CPF, Download MARCXML Authority, Merge, and Delete.

Light mode:



A screenshot of the Agent record page for "Adams, Ansel" in Light mode. The left sidebar shows a list of sub-records: Basic Information, Record Control Information, Record IDs, Identity Information, Entity IDs, Names, and Description Information. The main content area shows the "Basic Information" sub-record, which includes the "Agent Type" field set to "Person". The toolbar at the top includes buttons for Save, Light Mode (checked), Add Event, Publish All, View Published, Download EAC-CPF, Download MARCXML Authority, Merge, and Delete.

- The setting is sticky - the view will stay in Full mode until the toggle unless/until the Light mode toggle is checked. At that point the view will stay in Light mode until it is unchecked.

If a user who does not have Full mode privileges opens a record in Edit mode that has information in Full-only sub-records, they see a warning

44-1818) / Edit

Save

Add Event ▾

Download EAC-CPF

View Published

Download MARCXML Authority

Delete

Adams, Abigail (1744-1818)

Agent

?

This agent has data that is only editable in Full mode. To enable it, ask your administrator to enable Full Mode on this instance and grant you Full Mode permission.

×

Basic Information

Agent Type

Person

Publish