ArchivesSpace Training:
Basic Navigation

**Description:** This is an ArchivesSpace training session specifically geared toward allied library colleagues who may occasionally need to refer to ArchivesSpace in the course of their work.

**Learning Objectives:**
- Have a broad understanding of the system as a whole, in terms of the functions that will be managed through it
- Ready to use application in regular practice and rely on reference materials for follow-up on detailed questions or specific operations
- Comfortably navigate the system using searching and browsing

**Session Outline:**
1. Introductions (2 minutes)
   - ASpace Admins
   - Regular training protocols
2. Agenda (2 minutes)
3. Assumptions (2 minutes)
   - We may be showing you functions or operations that you do not perform in your work. Having a broader and more thorough understanding of the system will aid you in doing more discrete tasks.
   - We may be leading you through exercises that you might not be able to perform in your daily work because of your permission level.
   - For the sake of expediency in some exercises, we may ask you to create or work with truncated or incomplete data. The primary intention of this session is to acclimate you to the system and how it operates, rather than provide guidance on descriptive practice (although we want to use our systems in a way that encourages good practice).
   - We will refer to Archivist's Toolkit but do not presume knowledge of it, and it is not necessary for working with ArchivesSpace.
   - Other training opportunities are available
   - What won't be covered:
     - Installation and configuration
ii. User records and permissions; repository records (decided by Special Collections Managers and ASpace working group)

iii. Public interface; imports and other background jobs; events/collection management records; machine-actionable restrictions on containers (still TBD how these will be used)

iv. Migration and development processes

v. More detailed explanation of record creation

4. Application overview (5 minutes)
   a. What ArchivesSpace is
   b. What ASpace does and how do we use it:
      i. System of record for archival materials. Not everything is public, or open to staff, nor is it intended to be.
      ii. Perform core archival functions: accessioning, arrangement and description
      iii. Aid in public services
      iv. Record and report location holdings information; stacks management
      v. Manage digital objects
      vi. Produce access tools
      vii. Statistics gathering, prioritization, holistic planning
      viii. Contribute to various inter-departmental processes (preservation and digitization)
   c. Supports the use of standardized dates, languages, and controlled vocabularies. Application is informed by DACS, ISAD(G), and ISAAR (CPF) that promotes data quality, reusability, and interoperability. Generates outputs in standardized forms like EAD, MARCXML, and METS.
   d. Quick comparison to Archivist’s Toolkit
      i. Background
      ii. New functionality:
         1. Improved reporting capabilities
         2. More robust options for addressing the needs of born-digital materials (e.g. multiple extent statements)
         3. Better management of name and subject authorities
         4. Classification systems to help define arrangement schemes or collecting areas
         5. Features funded and developed by individual institutions, including Yale’s container management functionality, our location management enhancements, our locally-developed scripts and plugins for exporting MARC and EAD records
   iii. Differences:
1. Web-based application (inherited from Archon)
2. Single instance with multiple repositories rather than multiple individual instances in the support of administrative effort, ease of maintenance, and consistency in descriptive practice.
3. No assessment tool

5. Overall structure, look and feel (10-15 minutes)
   a. Demo
   b. Home button
   c. Dashboard and menus - repository selection and user information
   d. Record types
      i. Basic record template
      ii. Accession, Resource, Subject, Agent, Digital Objects, Locations
   e. Browse vs. Search
   f. Expandable frames, floating nav panes

6. Accession records (5 minutes)
   a. Overview
   b. What kind of information they contain
   c. Why you might use them:
      i. Locating materials in storage areas
      ii. Planning for rehousing or shifting project
      iii. Assessing volume and/or types of materials that have recently been acquired (e.g. film, textiles)
      iv. Determining digitization prioritization decisions
      v. Determining the disposition for specific parts of an accession
      vi. Addressing discrepancies between differing sources of information about a collection
      vii. Searching for missing or misplaced materials
   d. Review incomplete and robust accession records (~2 minutes):
      i. Navigate to the records (e.g. Sean O'Rudy and Village Green Preservation Society)
      ii. Required and optional fields
      iii. Spawn resource record from accession (demo on Village Green)
      iv. Analysis
         1. What kinds of information do you know or not know?
         2. What questions do you still have?
         3. Could you provide access to these materials?

7. Resource records (5 minutes)
   a. Overview
b. Single-level records

c. Hierarchy and multi-level records
   i. Breadcrumbs
   ii. Hierarchy for multi-level records
   iii. Notes and descriptive components
      1. Multi-part notes
      2. Publish? (publish all notes)

8. Top containers (5 minutes)
   a. Overview of data model and benefits (stability, stacks maintenance, shared boxes, integrations)
   b. Aeon preview
   c. Top container records
   d. Container profiles

9. Location records (5 minutes)
   a. Overview
   b. Location profiles

10. Space Calculator (5 minutes)
    a. Overview
    b. How it works: calculation taking into consideration the Top Container record, Container Profile record, Location record, and Location Profile record
    c. Find location with Space Calculator via Top Container record
    d. Use Space Calculator via Container Profile record

11. Conclusion (5 minutes)
    a. Resources to refer to (manual, screencasts, etc.); local guide will be ready by launch
    b. Training instance is yours to play with
    c. Who to contact with questions
    d. Post-session evaluation form

12. Free association record creation time and/or open question period (10 minutes)
    a. Activate ASpace help center user accounts