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Spreadsheet Data Entry

Collection Level Data

****Until further notice provide completed Excel file to Karla before proceeding to conversion steps.****

--You can download the spreadsheet XACT template here:

<https://drive.google.com/open?id=0B73XWJn4wwaFM29zcHJLSGpSb2s>

Please note: There are three tabs on this spreadsheet. You are only adding data to the template tab. You will need to delete the introduction and example tabs before you import to Oxygen.

--Any one row in the spreadsheet may be used for collection level information, but using the first row is recommended. An asterisk (*) is used when a field is required/highly recommended.

Associate ID: Leave blank

*Title: The title of the collection. ex: Nye County, Nevada Photograph Collection

Filing title: Filing title as you would enter into ArchivesSpace.

Ex: Nye County, Nevada Photograph Collection

Ex: Jackson (Jerry) Papers

*Collection level: Use “collection” without the quotes. Be sure to use all lowercase letters.

Subseries_reference and files_reference: leave blank

*Unique Identifier: Collection number. After the EAD imports to ArchivesSpace you will have to go back and parse out the five digit numerical string into the second box in this field.

*Extent number: This is the numerical number associated with linear or cubic footage, or in the case of born-digital collections, the total number of files. Choose your number from linear OR cubic footage OR digital files. This tool can only import one. You'll have to enter any remaining extents once the EAD has been uploaded to ArchivesSpace.

*Extent type: Use appropriate term from the following. Be sure to use all lowercase letters. If the term you need isn't below see the controlled value list in ArchivesSpace for extent_extnt_type and select the appropriate machine readable value.

- linear_feet
- cubic_feet
- digital_files

Extent summary: This is the container summary. Ex: 47 hanging folders, 1 shared box of negatives, and 1 CD-ROM

*Date expression: Range of dates for the collection. Ex: 1880-1990 If you have both inclusive and bulk dates you will have to select one type to use here. This tool can only import one. You'll have to enter any remaining extents once the EAD has been uploaded to ArchivesSpace.

*Date type: Use appropriate term from the following.

- inclusive
- bulk
- single

*Date begin: Complete with begin date of your date range from your date expression.

*Date end: Complete with end date of your date range from your date expression.

Instance type: Leave blank

Container type: Leave blank

Container indicator: Leave blank

Abstract: Complete with abstract for the collection.

Please note: For all notes you will need to insert <p> tags if you want to have a paragraph break.

Example:

<p>In 1859 a party of prospectors on their way to the California Gold Rush discovered a large deposit of silver ore near Virginia City, Nevada that was later named the Comstock Lode. This discovery spurred the "rush to Washoe" in 1860.However, a drop in silver prices, the boom and bust economy, skewed gender ratio, and fluidity of the immigrant population led to social instability and the mines began to steadily decline in the 1880s. </p>

<p>Mining in Nevada experienced a second precious metal boom just after the turn of the twentieth century when miners discovered silver and gold in Tonopah and Goldfield, and later in the Bullfrog District, in central Nevada..... For example, Nevadans referred to the Delamar gold mine, located in Lincoln County, as the "widow-maker" due to the prevalence of silicosis during the mine's active years (1896 to 1902).</p>

Bioghist: Complete with biographic or historical note for the component. You will need to enter in the appropriate note label after EAD has been imported (Historical Note or Biographical Note) OR customize the EAD-XML prior to import (see [Appendix](#)).

Processinfo: Complete with processing note for the collection.

Relatmaterial: Complete with related materials not for the collection.

Arrangement: Complete with arrangement note for the collection.

Acqinfo: Complete with acquisition note for the collection.

Prefercite: Complete with preferred citation note for the collection.

Scopecontent: Complete with scope and content note for the collection.

generalnote: Complete when applicable. Since we tend to not use "general note" as a label You will need to enter in the appropriate note label after EAD has been imported OR customize the EAD-XML prior to import (see [Appendix](#)).

accessrestrict: Complete when applicable. Will use our default note if left empty.

userrestrict: Complete when applicable. Will use our default note if left empty.

Component Data

Association id: This data will not be imported into ArchivesSpace. This is used only if you have series/subseries or other type of nesting. The association_id will let you associate series with subseries and subseries with other subseries (for nesting) and/or files. You do not need to use this field if you only have files within the collection (no nesting).

See example below. Color coding is not required for import. It is used here to demonstrate how linkages work between the association id and subseries reference and files reference.

- You can use any id you want, including words or simple letters/numbers.
- IDs cannot be repeated in different series, subseries. (i.e subseries A can have file A but subseries B cannot also have file A as an association id)
- If associate id references multiple subseries use commas to separate them.
- See Karla for a detailed tutorial.

	A	B	C	D	E	F	
1	association_id	title	filing_title	collection_level	subseries_reference	files_reference	u
2		Nye Coun	Nye County, N	collection			p
3	Series I.	Miscellaneous		series		Files I.	
4	Files I.	Postcard: Native America		file			
5	Files I.	Postcard: Freightin		file			
6	Files I.	Block and Botkin Gent's F		file			
7	Files I.	Las Vegas Town site		file			
8	Files I.	Las Vegas Town site		file			
9	Files I.	Las Vegas, Nevada		file			
10	Files I.	Las Vegas, Nevada		file			
11	Files I.	Las Vegas, Nevada		file			
12	Files I.	Palace Hotel, Las Vegas, N		file			
13	Files I.	Depot, Clark's Las Vegas		file			
14	Files I.	Rochela House, Las Vegas		file			
15	Files I.	Homes, Las Vegas, Nevada		file			
16	Series II.	People		series	Subseries II.A., Subseries II.B.		
17	Subseries II.A.	Families		subseries		Files II.A.	
18	Files II.A.	Adams family, Las Vegas,		file			
19	Files II.A.	Squires family, Las Vegas		file			
20	Files II.A.	Albright family		file			
21	Subseries II.B.	Individuals		subseries		Files II.B.	
22	Files II.B.	Branda Arnold, Las Vegas		file			
23	Files II.B.	Branda Arnold, Las Vegas		file			
24	Files II.B.	Henry J. Bohn		file			
25	Files II.B.	Lucille Spire Bruner		file			
26	Files II.B.	Lucille Spire Bruner		file			
27	Files II.B.	Lucille Spire Bruner		file			
28	Files II.B.	William Andrews Clark		file			
29	Files II.B.	Beda Cornwall		file			
30	Files II.B.	Clarabelle Hanley Decker		file			
31	Files II.B.	Sam Gay		file			
32	Files II.B.	Nevada Hatch, Nevada		file			
33	Files II.B.	Barbara Henry and Hal Eri		file			
34	Files II.B.	Julius Jensen		file			
35	Files II.B.	Tom Kendall, Nevada		file			

Title: Title of the series, subseries, file, or item.

Filing title: Leave blank.

Collection level: Use appropriate term from the following. Be sure to use all lowercase letters.

- series
- subseries
- file
- item

Subseries_reference: Use if you have subseries in a series. See screenshot above.

Files_reference: Use if for the files within a series or subseries. See screenshot above. You do not need to use this field if you only have files within the collection (no nesting).

Unique identifier: This is the Component Unique Identifier. See ArchivesSpace manual for instructions on entering data in this field. For photograph collection this would be the photo id.

Extent number: The number for the extent type. To be used with Series, Subseries. Not commonly used with files. If there are multiple extent types you will need to select one to enter here. This tool can only import one. You'll have to enter any remaining extents for the component once the EAD has been uploaded to ArchivesSpace.

Extent type: Use appropriate term from the following. Be sure to use all lowercase letters.

- linear_feet
- cubic_feet
- cassettes
- files
- gigabytes
- leaves
- photographic_prints
- photographic_slides
- reels
- sheets
- volumes
- audio_cassettes
- betacam
- betacam_sp_videotapes
- betamax_videotapes
- digital_files
- drawings
- floppy_disks
- items
- photographic_negatives
- u_matic_videotapes
- vhs_tapes
- hanging_folders
- optical_discs

Extent summary: This is the container summary.

Date expression: Range of dates for the component. If you have both inclusive and bulk dates you will have to select one type to use here. This tool can only import one. You'll have to enter any remaining extents once the EAD has been uploaded to ArchivesSpace.

Date type: Use appropriate term from the following.

- inclusive
- bulk
- single

Date begin: For Series and Subseries complete with begin date of your date range from the date expression. If a file or item leave blank.

Date end: For Series and Subseries complete with end date of your date range from the date expression. If a file or item leave blank.

Instance type: Select appropriate term from the following. Be sure to use all lowercase letters.

- mixed_materials
- graphic_materials
- audio
- books
- computer_disks
- digital_object
- digital_object_link
- maps
- microform
- moving_images
- realia
- text

Container type 1: Choose appropriate term from the following. Be sure to use all lowercase letters.

- box
- folder
- frame
- object
- page
- reel
- volume
- album
- flat_file
- item
- oversized_box
- roll

- slide_tray
- digital_file
- binder
- sheet

Container indicator 1: Complete only if you entered a container type 1. This is the number associated with container type 1. What is the box number?

Container type 2: If applicable select from the same terms as container type 1.

Container indicator 2: Complete only if you entered a container type 2. This is the number associated with container type 2.

Container type 3: If applicable select from the same terms as container type 1. This field is usually left blank.

Container indicator 3: Complete only if you entered a container type 3. This is the number associated with container type 3.

Abstract: Complete with abstract for the component.

Please note: For all notes you will need to insert <p> tags if you want to have a paragraph break. You do not need to add an opening tag at the beginning of your first paragraph, or a closing tag at the end of your note. This tool will automatically complete these tags. Don't worry if you do not add the paragraph break tags. You can always edit the notes in ArchivesSpace once the EAD has been imported in order to create the breaks.

Example:

<p>In 1859 a party of prospectors on their way to the California Gold Rush discovered a large deposit of silver ore near Virginia City, Nevada that was later named the Comstock Lode. This discovery spurred the "rush to Washoe" in 1860.However, a drop in silver prices, the boom and bust economy, skewed gender ratio, and fluidity of the immigrant population led to social instability and the mines began to steadily decline in the 1880s. </p>

<p>Mining in Nevada experienced a second precious metal boom just after the turn of the twentieth century when miners discovered silver and gold in Tonopah and Goldfield, and later in the Bullfrog District, in central Nevada..... For example, Nevadans referred to the Delamar gold mine, located in Lincoln County, as the "widow-maker" due to the prevalence of silicosis during the mine's active years (1896 to 1902).</p>

Bioghist: Complete with biographic or historical note for the component. You will need to enter in the appropriate note label after EAD has been imported (Historical Note or Biographical Note) OR customize the EAD-XML prior to import (see [Appendix](#)).

Processinfo: Complete with processing note for the component.

Relatmaterial: Complete with related materials not for the component.

Arrangement: Complete with arrangement note for the component.

Acqinfo: Complete with acquisition note for the component.

Prefercite: Complete with preferred citation note for the component.

Scopecontent: Complete with scope and content note for the component.

generalnote: Complete when applicable. Since we tend to not use “general note” as a label You will need to enter in the appropriate note label after EAD has been imported OR customize the EAD-XML prior to import (see [Appendix](#)).

accessrestrict: Complete when applicable.

userrestrict: Complete when applicable.

Converting XACT Excel Template to EAD-XML

--If this is your first time importing a Excel spreadsheet in Oxygen chances are you will need to. Follow the steps detailed in this Oxygen tutorial:

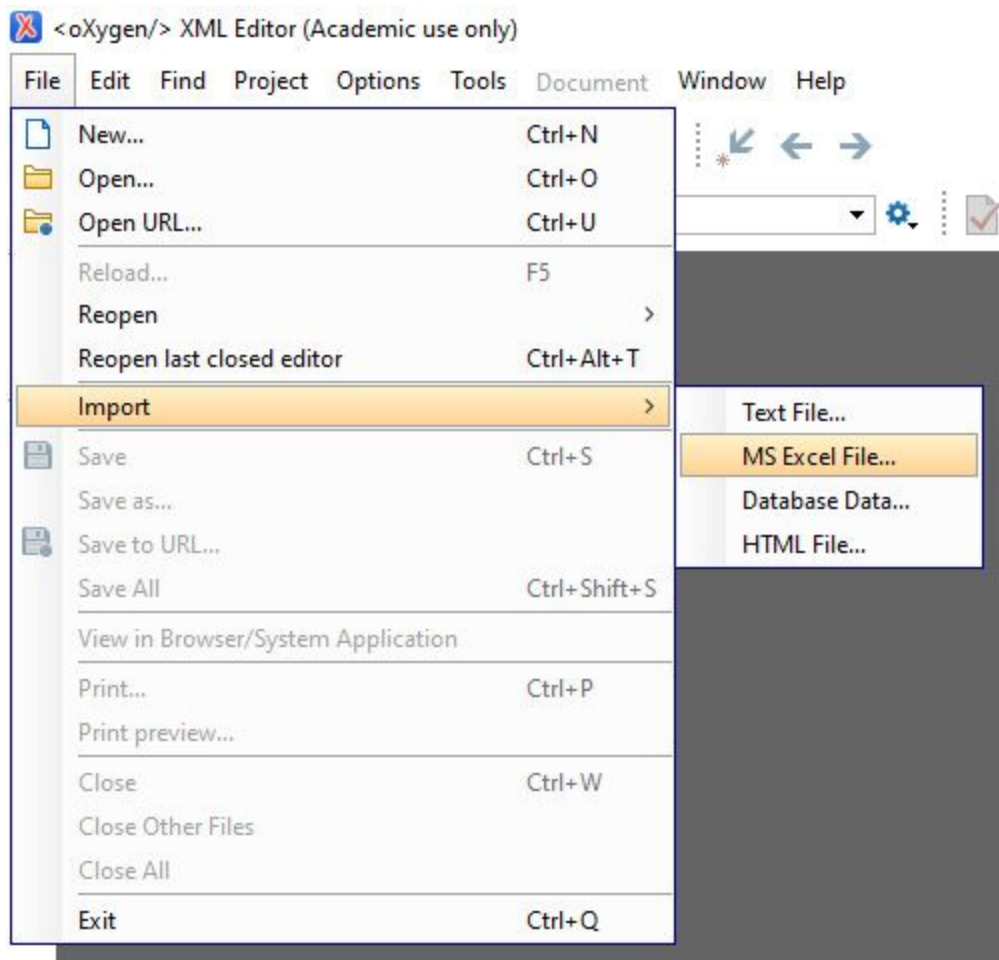
<https://www.oxygenxml.com/doc/versions/18.1/ug-editor/topics/import-excel-new-format.html>

--Download the xcel2xml.xls file to somewhere convenient on your desktop. You probably also want to set up a folder to store this file and your eventual EAD-XML transformation:

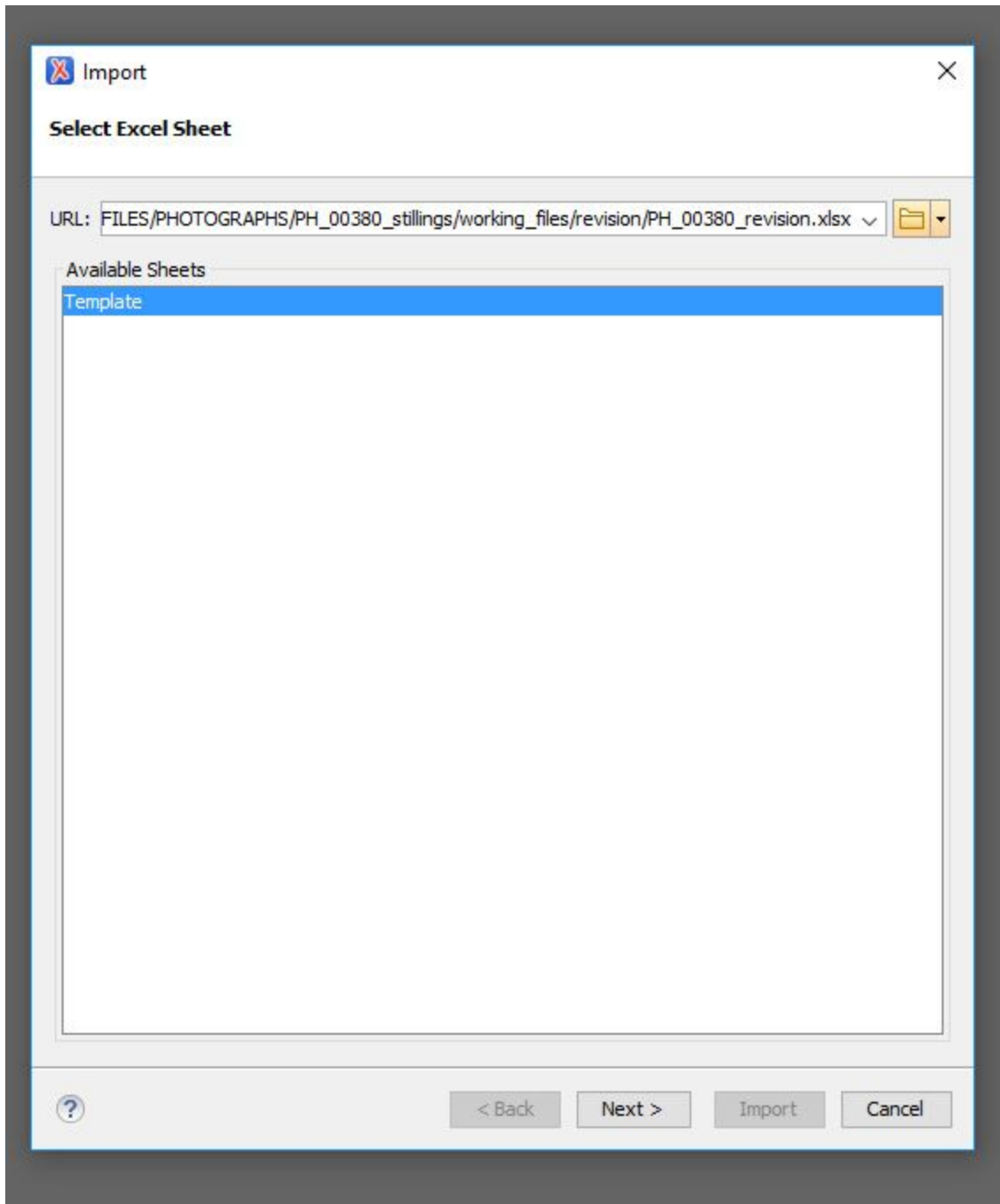
https://drive.google.com/open?id=0B4_pYL3u-BNWd3UwRExnOWNYaUk

Now you are ready you import your spreadsheet. To import the spreadsheet into Oxygen follow these steps:

Go to File>Import>MS Excel File



Browse for the file and open. It should look something like this:



Select Next

Check "First row contains field names" and then click on the blue cog wheel next to the customize button to further change the import settings.



Import



Import criteria

Settings

<> association_id	<> title	<> filing_title	<> collection_level
	Jamey Stillings...	Stillings (Jamey)...	collection
Series I.	Mike O'Callaghan-Pat Til...		series
Files A.	Lake Mead near Hoover...		file
Files A.	Highline crane system u...		file
Files A.	Approach bridge on the...		file

☒ First row contains field names

Customize



☒ Import formatted data (as displayed in Excel)

Import settings

XML Import Preview

```
<?xml version="1.0" encoding="UTF-8"?>
<root>
  <row>
    <title>Jamey Stillings...</title>
    <filing_title>Stillings (Jamey)...</filing_title>
    <collection_level>collection</collection_level>
    <unique_idenfifer>PH-00380_rev</unique_idenfifer>
    <extent_number>585</extent_number>
    <extent_type>Digital Files</extent_type>
    <extent_summary>6.83 GB; Transferred electronically, no physical carrier</extent_summary>
    <date_expression>2009-2014</date_expression>
  </row>
</root>
```

Output file

☒ Open in Editor

☐ Save in file



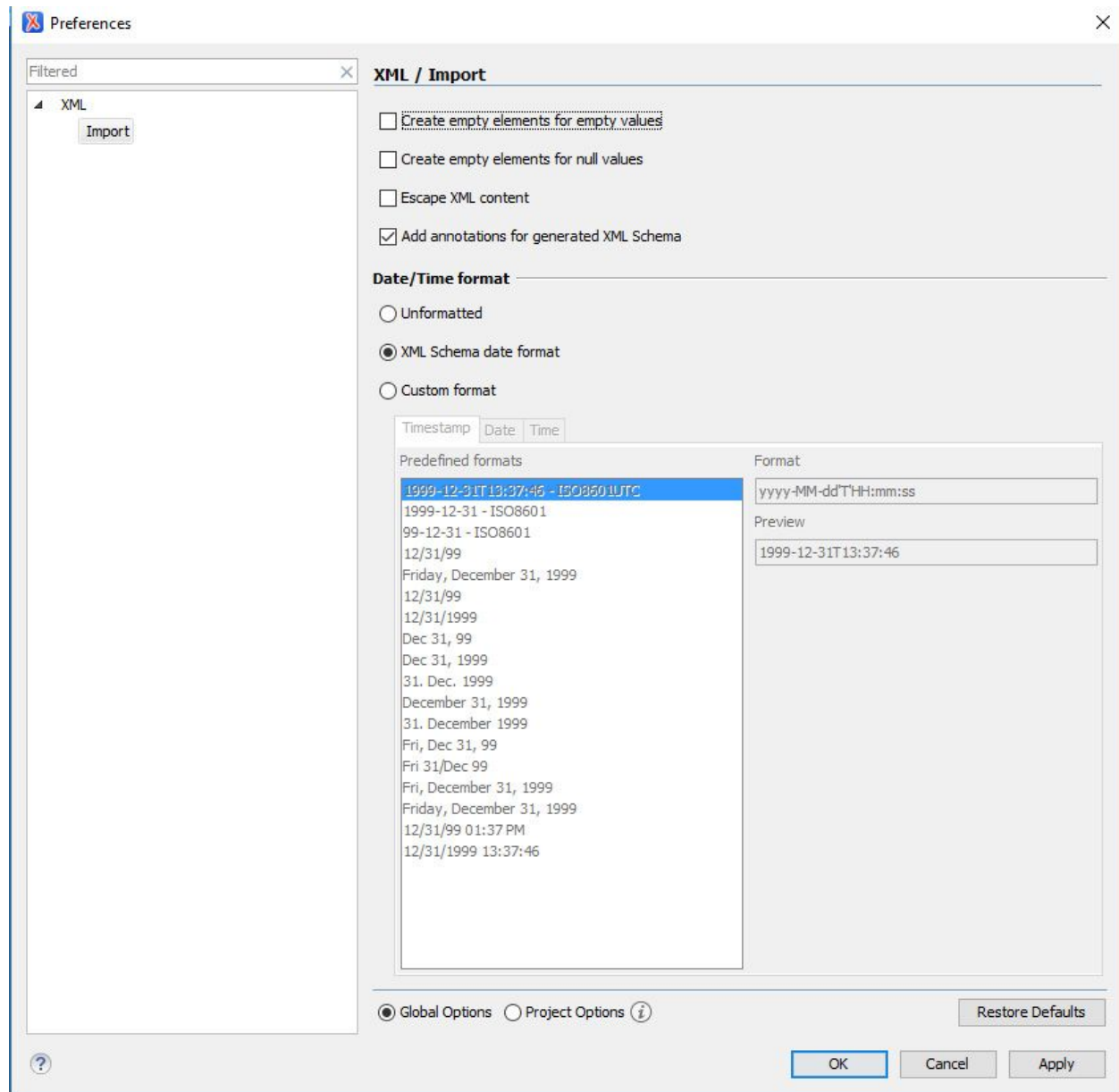
< Back

Next >

Import

Cancel

Uncheck the first three boxes. Your screen should look like this:



Click Apply
Click OK
Click Import

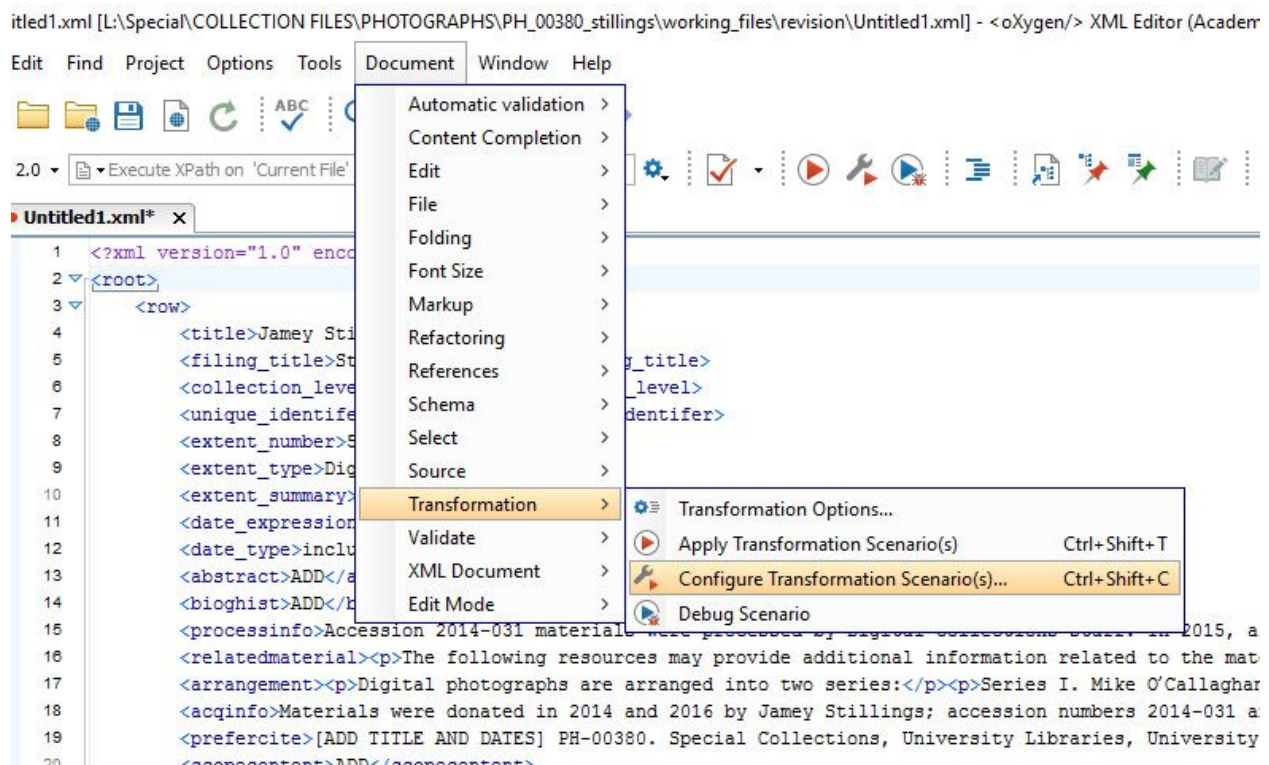
If the import worked a text box will read "Operation successful". Close the Import text boxes. You should now be viewing a screen with XML generated from your spreadsheet. Take a look and make sure both the collection level data and container list look complete.

Optional: You can save the file if you want but it is not required.

Configure Transformation Scenario

It is now time to set up your transformation. Please note: As long as the location of your xml2ead.xls file does not change you will be able to skip this step the next time you run a transformation.

1. Open Document>Transformation>Configure Transformation Scenario OR select the wrench icon with the red arrow



OR (wrench icon with the red arrow)



2. Select New

Configure Transformation Scenario(s)

Association	Scenario	Type
Global (3)		
<input type="checkbox"/>	ASpace transformation	XML with XSLT
<input checked="" type="checkbox"/>	XACT	XML with XSLT
<input type="checkbox"/>	old_aspace_conversion	XML with XSLT

☐ Association follows selection

New

Edit

Duplicate

Remove

Associated scenarios

There are no scenarios associated with the document(s). To associate one or more scenarios, select their check boxes in the table above.

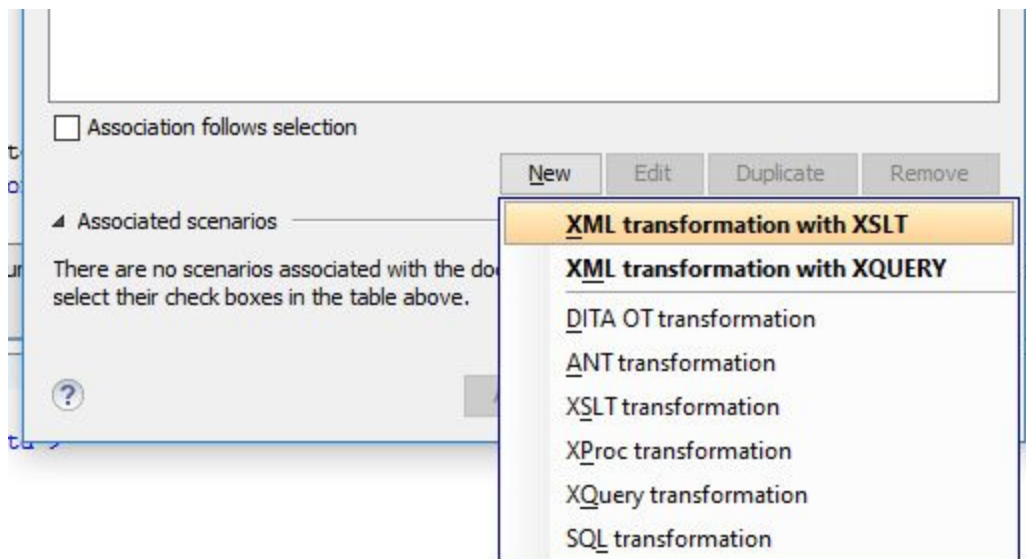
?

Save and close

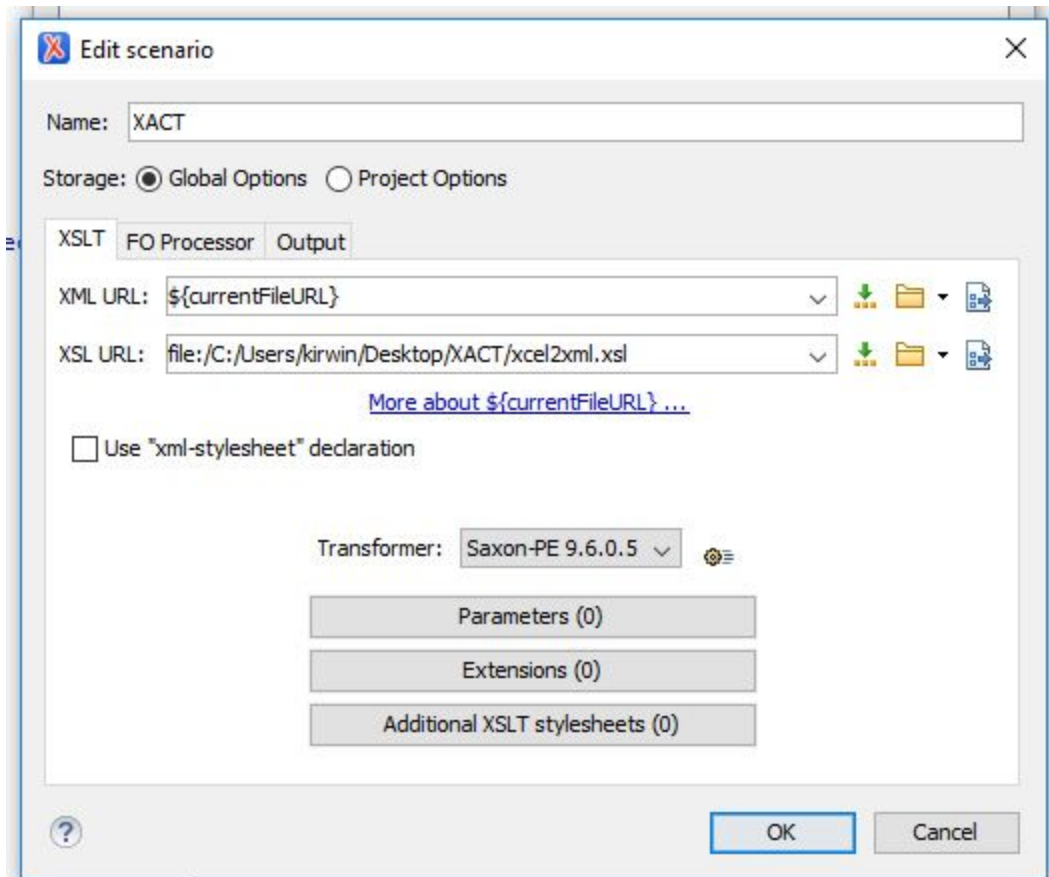
Apply associated (0)

Cancel

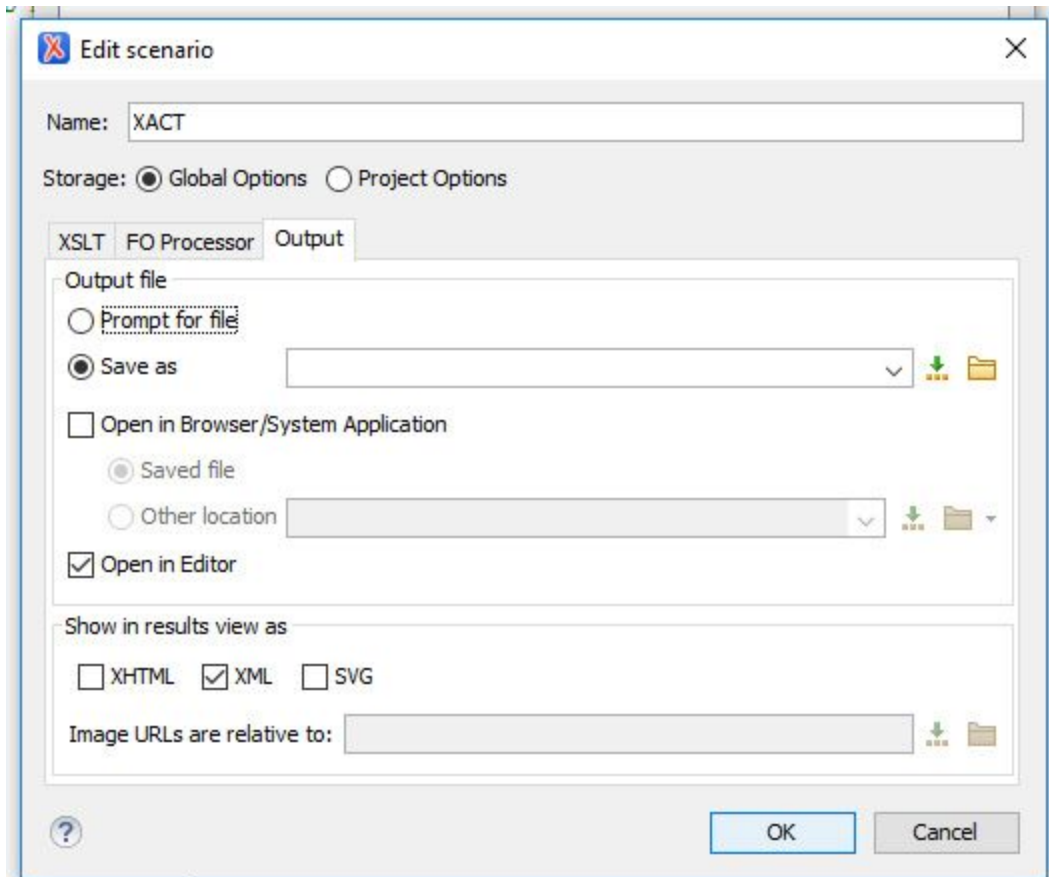
3. Select XML transformation with XSLT



4. Under the XSLT tab give the scenario a name, such as XACT
5. Select Global Options
6. XML URL: \${currentFileURL}
7. XSL URL: Navigate to the location of your xml2EAD.xsl file and select
8. Transformer: Saxon-PE 9.6.0.5



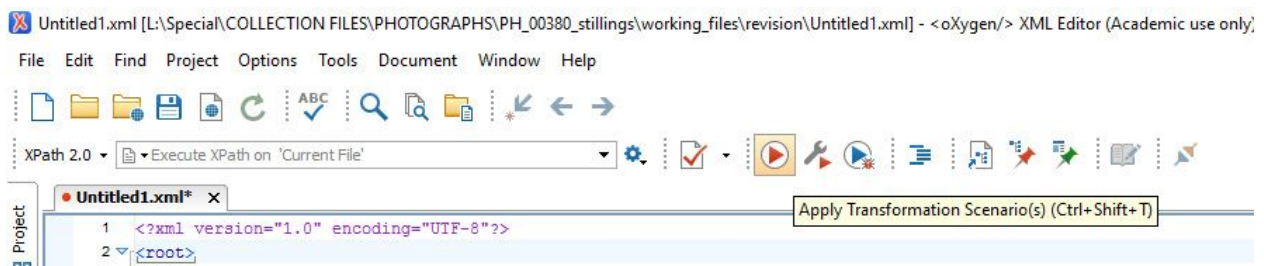
9. Now go to the Output tab. Check "Open in Editor" and then select OK.



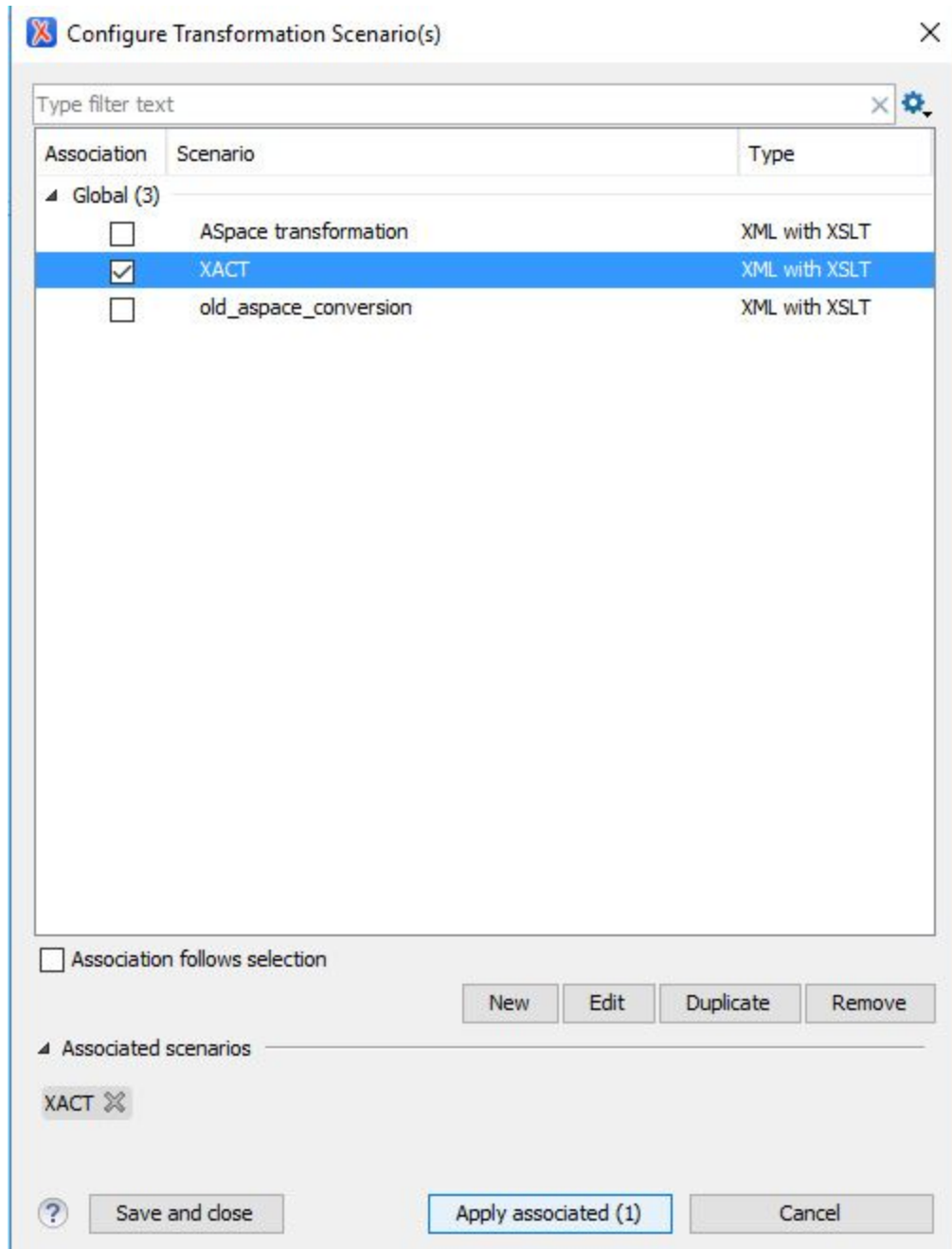
Convert XML to EAD

Now you can perform the transformation

1. Click on the red play button next to the wrench icon



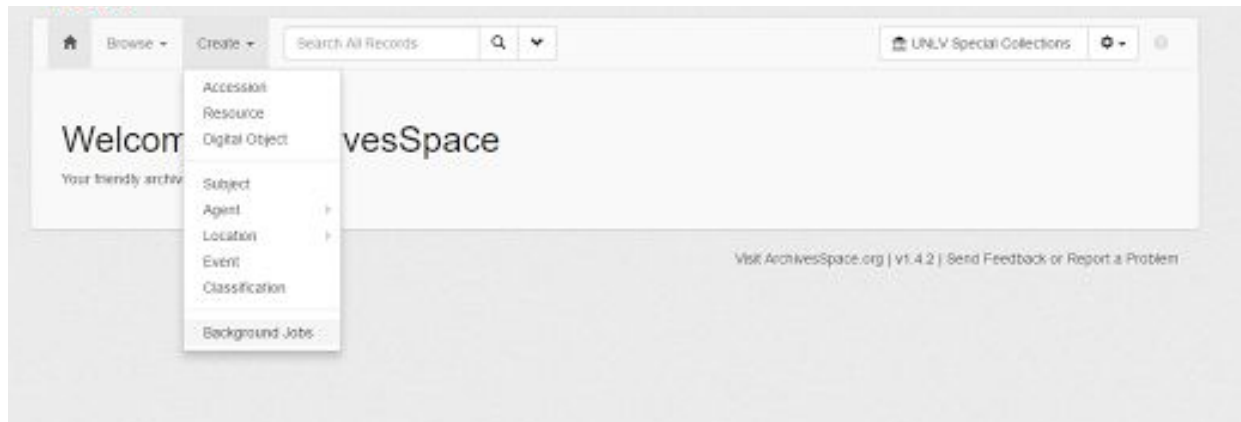
2. Check the transformation scenario you set up and then select apply associated



3. If successful, a new tab will open in Oxygen. This is your EAD file.
4. Take a look and make sure everything looks ok.
5. If Oxygen is pointing out any errors in the XML (red highlights) see Karla to troubleshoot.
 - Please note: some errors may be due to local rules that do not follow EAD formats such as oversized_box
 - You can also ignore the error if it looks like this: <c level="file"> OR <c level="series"> OR <c level="subseries">
6. Save file. This file will be imported into ArchivesSpace in the next step.

Import EAD to ArchivesSpace

1. It is always recommended to import into Test before production to make sure everything looks ok!
2. Click Create>Background Jobs



3. Select Import Data for Job Type
4. Select EAD for Import type
5. Add the EAD file you created. You can add multiple EAD files.

A screenshot of the 'New Background Job' form in ArchivesSpace. The 'Job Type' dropdown is set to 'Import Data'. A red warning box states: 'Find and replace jobs can and will make major changes to your database. You are strongly advised to backup your database AND to run your job in a test instance before proceeding. There is no "undo".' The 'Import Type' dropdown is set to 'EAD'. A green '+ Add file' button is visible. Below it, a file named 'test_test_008.xml' is listed. At the bottom, there are 'Queue Job' and 'Cancel' buttons.

6. Select Queue Job and wait for import to complete.
7. Once imported check to make sure everything looks ok. Is everything properly nested? Are notes complete?
8. You will need to change the collection ID. Right now it is one box and needs to be parsed out into two per local policy.

9. You will also need to specify the label for the biographist (if used) to specify biographical or historical note.

Appendix

How to customize note labels:

1. Find your note in the EAD-XML
2. You can customize your label by changing the information within the <head> tag. In the example below we have a general note with the generic “general” label
- 3.

```
82         </did>
83         <odd audience="external">
84             <head>General</head>
85             <p>Content of general note here. </p>
86         </odd>
87         <scopecontent audience="external">
88             <head>Scope and Contents Note</head>
89             <p>S and C series note here.Test the paragraph.</p>
90         </scopecontent>
91         <arrangement audience="external">
92             <head>Arrangement Note</head>
93             <p>Series arrangement note here.</p>
94         </arrangement>
95         <biographist audience="external">
96             <head>Biographical Note</head>
97             <p>test customize</p>
98         </biographist>
```

4. In the screenshot below the label has been changed to “job site”

```
82         </did>
83         <odd audience="external">
84             <head>Job site</head>
85             <p>Content of general note here.</p>
86         </odd>
87         <scopecontent audience="external">
88             <head>Scope and Contents Note</head>
89             <p>S and C series note here.Test the paragraph.</p>
```

