A Reference Guide to ArchivesSpace—Rapid Data Entry (RDE)
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Introduction
If you are adding to a Multi-Level Resource Record, the Rapid Data Entry (RDE) tool can be useful for minimizing typing and mouse clicks. RDE is effectively a spreadsheet built into ArchivesSpace. Like the Harvard spreadsheet importer, RDE is optimal for adding many components at once. For example, users can enter a long list of files under a particular series much more quickly than entering them one-by-one. These steps provide a quick reference for how to complete them using RDE. However, RDE is also useful for adding just one component to an existing component list.

As you manage your component list, you will likely encounter a situation in which you want to add to an existing collection. RDE allows users to select components at any hierarchical level and add siblings or children to them. Though both RDE and the Spreadsheet Importer function similarly, they have very important differences. Unlike the Harvard Spreadsheet that requires users to delete components records before uploading a new version, Rapid Data Entry functions iteratively.

Please refer to this decision tree for help determine which method is best for you.

Using this Documentation
This documentation, along with the Spreadsheet Importer Documentation addresses data entry methods for ArchivesSpace. If you have never used ArchivesSpace, please read the Basic ArchivesSpace Documentation before attempting RDE. The basic documentation defines common ArchivesSpace terms that users should be comfortable with before using RDE. If you have questions about terminology, please the ArchivesSpace Glossary.

You will see links throughout the documentation that will lead you elsewhere in this document. There will be a (Return) button that will direct you back to your original spot in the document.

The controlled vocabulary used throughout the spreadsheet template enforces metadata best practices. However, it is not perfect. If you encounter a field in which none of the controlled values appropriately describe your archival object, please reach out to diglib@indiana.edu.

Questions?
Most of the material in our existing finding aids can be cut and pasted into ASpace fields. Sometimes the correlation is obvious, sometimes it’s a little less so. You can consult DACS if you have questions about whether a particular element belongs in a certain category. Some of the decisions made here are more about our local needs and are up for discussion, but others need to be followed for DACS compliance.

Have questions? Please consult the ArchiveSpace Help Center and our ArchivesSpace Glossary. Feel free to e-mail diglib@indiana.edu with any questions.
Getting Started
(Return)

When you create a resource record, ASpace automatically begins a tree at the top the screen. It initially includes only the name of the collection (Indianapolis Foundation Records, in the instance below). You can use the Rapid Data Entry function to begin adding series, sub-series, and folder titles. First, click your targeted level. The highlighted level indicates where the components you’re about to add will nest within. Without selecting a targeted level, all components will be added to the end of the Resource tree regardless of the level indicated during data entry. It is a very easy mistake to add components under the wrong level, so pay extra attention to what level is highlighted before you click the Rapid Data Entry button.

The initial Rapid Data Entry Screen will include all possible columns when you first log in, and will look something like this:

This screen is the functional equivalent of a spreadsheet, with some of the functionality of Excel. Each of the available columns are described in the following section.

All columns highlighted in blue in the above image are “sticky.” Sticky columns will automatically fill down when you add rows to the spreadsheet. Any column can be sticky. Click on the column heading to toggle its sticky status from blue (sticky) to white (not sticky).

Add one row by clicking the Add Row button; add multiple rows by clicking the down arrow that immediately follows it (Return). You may specify as many rows as you need. You may also add additional rows by clicking the green plus sign at the end of each row, or delete extra rows by clicking the white x button.

Note: If you added components under the wrong level, you can easily reorder them. See Reorder Mode for a simple fix.
There is an option to select which columns are visible. This is a very useful function for collections that do not require each column. However, this function is often buggy. If you take advantage of this function, make sure your columns still line up with the correct text box or drop-down menu.

**Filling in Columns**

Return

As you fill in each column, keep in mind that you can click the **Validate Rows** button at any point to check if what you’ve entered so far will be accepted. Validating will also undo any bugginess that you encounter while using RDE. For example, resizing columns sometimes resets templates. Clicking **Validate Rows** in this situation will undo the reset while maintaining the resized column.

**Basic Information**

**Level of Description**

The **Level of Description** column allows you to select the appropriate description for the data you’re entering. Series, sub-series, and file (meaning: folder) will be the most common, but item may be used. The collection-level entry is created automatically by Apace. It’s generally easiest to rough out the organization of your collection by creating all of your series data first, which best uses the fill down capabilities of the spreadsheet. If you need to use **Other Level**, you will need to add a value to the adjacent Other Level column. Keep in mind that you need to highlight the series you want to add items to if you’re adding a sub-series or file. Otherwise, your entries will automatically populate under the last selected series.

**Publish**

This should always be selected. Not checking the **Publish?** button does not guarantee an archival object will be restricted on archives.iu.edu. If you do not want information accessible by the public, do not include it in ArchivesSpace.

**Title**

A title is required for every entry. Omit the date from this title to avoid repeated information in the record. Terminating punctuation is unnecessary; ArchivesSpace will automatically add a comma between the Title and Date or Date Expression.

**Component Unique Identifier**

We are not using this field.

**Language**

Select the language of the materials in the series, sub-series, file, or item that you are describing. You may do this at every level, but it is not required.
Language cannot be repeated in RDE. For items that require multiple languages, add them manually after saving your work in RDE. When you’re in edit mode on the main Resource page, select the archival object from the tree at the top of the page. Scroll down to Language and click the Add Language button.

Script
This is the script of the language you’ve identified. The script for English is Latin.

Dates
Like Languages, Dates cannot be repeated in RDE. For items that require multiple dates, add them manually after saving your work in RDE. When you’re in edit mode on the main Resource page, select the desired archival object from the tree at the top of the page. Scroll down to Date and click the Add Date button.

Expression
Expression is only for use when you need to convey information that does not fit in a numerical range (YYYY-MM-DD to YYYY-MM-DD). Examples include ca. or undated (please use “undated” instead of n.d. to comply with preferred DACS usage), or broken date ranges (1943-1945, 1949-1953). Text entered in the Expression field is what will be visible to the end user.

Date Type
Choose between Inclusive, Single, and Bulk Dates.

Label
Creation and Publication are the most likely choices in this drop-down list. The field is required if any other date fields have data.

Begin and End
These fields must be used as appropriate if there is no data in the Expression column. Expression overrides the need for these dates, but make sure to use these columns if you are able to give any sort of date range. This field is machine readable—Expression is not.

Extent
It is optional to use these fields beyond the collection-level entry. However, Extent and Type are crucial for certain collections such as those including AV items. Use your best judgment to determine if these fields are important for your collection.

Extents cannot be repeated in RDE. For items that require multiple extents, add them manually after saving your work in RDE. When you’re in edit mode on the main Resource page, select the desired archival object from the tree at the top of the page. Scroll down to Extents and click the Add Extent button.
Portion
Select *whole* unless the number does not represent the entire collection.

Number
This is a numerical indicator that represents the amount of the extent.

Type
This field will have the most variety across collections. Choose what is appropriate for your collection. At this time, the *Extent Type* drop down list is in the process of being cleaned up. Please bear with us while the list is significantly reduced.

The controlled vocabulary used throughout ArchivesSpace enforces metadata best practices. However, it is not perfect. If you encounter a field in which none of the controlled values appropriately describe your archival object, please reach out to diglib@indiana.edu.

Container Summary
Include the specific breakdown of boxes and other formats—including everything that normally goes in parentheses.

Physical Details
More specific information about the types of materials. This is a good place for the very specific breakdown of media types for AV materials, for example. Our default is to leave this blank.

Dimensions
Specific measurements, mainly intended to describe one-item entries. Our default is to leave this blank.

Instance
Select the best representation of the *Instance Type* for your archival object. The default value should be *Mixed Materials* unless there is certainty of the contents of a particular folder. Use *Graphic Materials* for photographs and drawings, *Moving Images* for video, *Audio* for various audio formats, *Text* for things you know are 100% text, etc.

Container Type
*Container Type* will not automatically appear as a column in RDE. If you are using an already created *Top Container*, you can simply begin typing the name of the Top Container and select the appropriate option. If you’re starting a new box, case, or reel, however, you’ll need to click the *Create* button. From there, you will find a *Container Type* drop-down menu. Select what is most appropriate for your *Top Container*. 
**Child Type** will be the next container type down from the *Box*, usually *Folder*, but sometimes *Object* or *Reel*. If the first container type is *Object*, you will not need to complete this field.

**Grandchild Type** is for the rare instances in which you need another level of container, and the same options apply to it as to *Child*.

**Indicator**

*Indicator, Child Indicator, and Grandchild Indicator* simply refer to the number of the *Box, Folder, Case, Object*, or *Reel*. In the case of videos, audiocassettes, or objects with A or V numbers, record this number here.

**Barcode**

We are currently not using this field, but may in the future if we barcode our boxes for tracking. Do not use this field for individual barcoded items (i.e., AV materials.)

**Notes**

You can add up to three Notes per line in *Rapid Data Entry*. The list of possible notes in this form is the same as in ArchivesSpace and the Spreadsheet Importer. Selections that are especially useful for our collections are: *Language of Materials, Materials Specific Details* (for formats), *General*. Do not replicate descriptions from the top level of the finding aid.

**Label**

Use *Label* if you want the *Note Type* to appear differently from the text in the *Note Type* dropdown menu. For example, if you want a *Scope and Contents* Note to appear as “Contents and Scope” in the finding aid, you would select *Scope and Contents* for *Note Type* and write Contents and Scope for the *Label*.

**Content**

This is the note’s text. If you need to add more than three *Notes*, add them manually after saving your work in RDE. When you’re in edit mode on the main Resource page, select the desired archival object from the tree at the top of the page. Scroll down to *Notes* and click the *Add Note* button.

**Final Steps**

Once you’ve entered data for each desired row, click *Save Rows* on the bottom left corner of the screen. A pop-up window will appear if there are any errors. You will be redirected to your Resource.

If the components you entered are not in the expected order in the Resource tree, you have two options.

1. Select the component you’ve identified and edit the *Level of Description* so it is properly nested.
2. Click *Enable Reorder Mode* on the top left menu while in edit mode. *(Return)*

You will be redirected to a screen in which you can manually drag and reorder each component. Drag the selected component by clicking the rectangle of dots on the far left of the component and moving it to the desired location.
For example, here is a Resource tree with unassociated components.

Let’s say I want Folder 1 to be a Child of Series 1. I will drag Folder 1 into Series 1.

The following menu will open:

In this situation, I want File 1 to be a Child of Series 1 so I will select Add Items as Children.

Now File 1 is nested under Series 1.

Please see Reordering Container Lists in the ArchivesSpace Basic Documentation for a more instructions about Reorder Mode.

Manipulating the Spreadsheet

Above the row of columns for data entry is a menu that can be used to manipulate the spreadsheet. You may not be able to see each option depending on your permissions access. If you need to utilize any of the following functions, ask the repository manager or e-mail diglib@indiana.edu. All functions are described here:

General Column Manipulation

All columns highlighted in blue in the above image are “sticky.” Sticky columns will automatically fill down when you add rows to the spreadsheet. Any column can be sticky. Click on the column heading to toggle its sticky status from blue (sticky) to white (not sticky). Each column can also be resized by clicking and dragging the two vertical dotted lines on the far right of each column identifier.
Add Row
Add one row by clicking the **Add Row** button; add multiple rows by clicking the down arrow that immediately follows it (Return). You may specify as many rows as you need. You may also add additional rows by clicking the green plus sign at the end of each row. To delete a row, click on the white X button. Click the X button a second time after it turns red to confirm that you want to delete the row.

Visible Columns

**Return**
There is an option to select which columns are visible. This is a very useful function for collections that do not require each column. This is also the first step to creating a template. To select which columns are visible, click the Columns dropdown menu. If you’re using it for the first time, it should read “Columns: 33 visible.” Uncheck any columns you do not wish to use. The only column you cannot uncheck is Level of Description as it is a required field.

RDE Templates
Please see **Templates** section later in this document.

Fill Column

If you are entering many components that share data fields, using the **Fill Column** function will save a lot of time and mouse clicks. First, follow the instructions to add as many rows as you need. Next, click the Fill Column button. A menu for Basic and Sequence filling will appear under the button.
Choose *Basic* if you want every row of a column to have the same value. Choose *Sequence* if you want the values in each row of a column to increase incrementally. For example, *Sequence* filling would be useful to fill in folder numbers that increase in a predictable pattern. You can preview what a sequence would look like by clicking the **Preview Sequence Values** button on the right.

If you used the *Basic Fill* option, the desired data will auto-populate into each added row added to the bottom of the spreadsheet. If you are using the *Sequence Fill* option, added rows will disrupt the order. If you need to add rows to a sequence, whether in the middle of the spreadsheet or at the end, you will need to redo the *Sequence Fill*.

**Reorder Columns**

Simply put, the **Reorder Columns** function allows you to reorder columns. When you click the **Reorder Columns** button, a menu with all columns will appear.

To move a column, click on the column title and click the arrow buttons on the right until the column is in the desired location. Once your order is set, click **Apply Column Order** and the columns will automatically reorder. Reordering columns can be done at any point throughout data entry.

See **Templates** for instructions on **Save as Template** and **Remove Template**.
View Inline Errors
Fields highlighted in pink indicate one of two things:

1. Information is missing from a required field.
2. Information is missing from fields conditionally required by a field that is highlighted

Click View Inline Errors from the top menu to expand the errors indicated by each field highlighted in pink. Otherwise, you can click the arrow beneath the exclamation point on the left-hand side of each pink highlighted field to reveal the same errors. The View Inline Errors function tends to be very laggy.

Any field that is highlighted in green is either not required, or the data entered is valid. Rapid Data Entry is not always able to accurately predict what fields are conditionally required. For example, when I entered that the Level of Description was Series, that triggered Title and Date Type to become highlighted as conditionally required fields.

However, when I selected Single as the Date Type, ArchivesSpace highlighted the Expression, Begin, and End fields as conditionally required fields. For a Single Date Type, only the beginning date is required in order to be valid.

It is easiest to check your work by clicking the Validate Rows button on the bottom left of the RDE pop-up screen. Doing so will indicate if any data you’ve entered is truly invalid. After clicking Validate Rows, ArchivesSpace highlighted all fields green even though the previous screen seemed to indicate that required fields were missing.

Reset
Click Reset to erase all data entered in RDE. All 33 columns will be visible once again. One empty row will remain after clicking Reset. Keep in mind that your work will not be saved unless you click Save Rows on the bottom left-hand side of the RDE pop-up screen.
Helpful Hints

Keyboard shortcuts and helpful hints are listed beneath the spreadsheet on the RDE pop-up screen.

Templates (Return)

Creating Templates

A template is a useful way to save time while entering many similar records. Users can use templates to choose default columns and autofill most fields. To begin creating a template, open any Resource and click Edit. Then, click the Rapid Data Entry button at the top left corner of the screen.

A pop-up window with an empty row of columns should appear. Refer to Visible Columns to refresh your memory on how to reduce the number of desired columns. Refer to Reorder Columns if you would like to change the order of selected columns. You can stop here if you just want to set default fields to be filled. Follow the instructions for Filling in

Columns if you’d like to set default text for each column as well. At this time, the only columns that will not autofill when templates are applied are Note Type and Top Container.

If you apply a template with a Top Container, you’ll see something like the image below show up in the Top Container field. You will have to enter or create a Top Container manually to get around this bug.

Once you’ve satisfactorily filled in your template, click Save as Template from the top menu.

We have provided a few basic templates, but we encourage you to experiment with making your own. However, all Indiana University repositories will be able to see your templates. The drop-down menu for templates may get long, so following a naming convention will be useful to keep the list orderly. Please use the following naming convention if you do create your own template: iu[campus]-[repoidentifier]-[templatename]

Examples: iub-lamc-folder, iukokomo-series, iusb-video, iupui-ruthlillymedical-folder

Note: If your repository identifier already names your campus, there is no need to add a campus identifier. In that case, iu[campus] is unnecessary because the campus identifier is the same as the repository identifier.
Please refer to Appendix II if you are unsure about your campus and/or repository identifier.

To delete a template, click Remove Templates from the top menu. Select the template you wish to remove by ticking the checkbox, and then click Confirm Removal.

Using Templates

Templates are a great way to simplify and speed up data entry. To use a template, open any Resource and click Edit. Then, click the Rapid Data Entry button at the top left corner of the screen. From the top menu, click on the Apply an RDE Template drop-down menu.

After selecting a template, the columns will reposition and autofill to reflect the template default values. Any row added will follow the same selected template. You are not required to only use the templates set by your repository. Feel free to browse all templates and choose one that suits your needs. However, check with the repository manager or your supervisor to ensure that they do not have a preferred template.
Appendix I: Rapid Data Entry: Major Types of Records

Below are a few examples of what common entries would look like in Rapid Data Entry. You do not have to follow these examples directly, but they are a good place to start.

Series Level:

<table>
<thead>
<tr>
<th>Basic Information</th>
<th>Language</th>
<th>Date Type</th>
<th>Label</th>
<th>Begin</th>
<th>End</th>
</tr>
</thead>
<tbody>
<tr>
<td>Series</td>
<td>English</td>
<td>Inclusive Date</td>
<td>Creation</td>
<td>1950</td>
<td>1990</td>
</tr>
</tbody>
</table>

Note: To ensure components are nested correctly, enter all components one level at a time. Please see Getting Started for more information. In this example, add the Correspondence series first and Save Rows.

Subseries Level:

<table>
<thead>
<tr>
<th>Basic Information</th>
<th>Language</th>
<th>Date Type</th>
<th>Label</th>
<th>Begin</th>
<th>End</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sub-Series</td>
<td>English</td>
<td>Inclusive Date</td>
<td>Creation</td>
<td>1970</td>
<td>1980</td>
</tr>
</tbody>
</table>

Folder Level:

<table>
<thead>
<tr>
<th>Basic Information</th>
<th>Language</th>
<th>Date Type</th>
<th>Label</th>
<th>Begin</th>
<th>End</th>
</tr>
</thead>
<tbody>
<tr>
<td>File</td>
<td>English</td>
<td>Single</td>
<td>Creation</td>
<td>1975</td>
<td></td>
</tr>
</tbody>
</table>

Note: To ensure components are nested correctly, enter all components one level at a time. Please see Getting Started for more information. In this example, add the Correspondence series first and Save Rows.

<table>
<thead>
<tr>
<th>Test Resource</th>
<th>Collection</th>
<th>Sub-Collection</th>
<th>Box</th>
</tr>
</thead>
<tbody>
<tr>
<td>Correspondence, 1966-1990</td>
<td>Series</td>
<td>Mixed Materials</td>
<td>5</td>
</tr>
<tr>
<td>University, 1970-1980</td>
<td>Sub-Series</td>
<td>Mixed Materials</td>
<td>5</td>
</tr>
<tr>
<td>McDonald, 1975</td>
<td>File</td>
<td>Mixed Materials</td>
<td>5</td>
</tr>
<tr>
<td>McLaughlin, 1970s</td>
<td>File</td>
<td>Mixed Materials</td>
<td>5</td>
</tr>
<tr>
<td>Repository</td>
<td>Campus Identifier</td>
<td>Repository Identifier</td>
<td></td>
</tr>
<tr>
<td>---------------------------------------------------------------------------</td>
<td>-------------------</td>
<td>-----------------------</td>
<td></td>
</tr>
<tr>
<td>African Studies Collection</td>
<td>iub</td>
<td>africanshstudies</td>
<td></td>
</tr>
<tr>
<td>Archives of African American Music and Culture</td>
<td>iub</td>
<td>aaamc</td>
<td></td>
</tr>
<tr>
<td>Archives of Traditional Music</td>
<td>iub</td>
<td>atm</td>
<td></td>
</tr>
<tr>
<td>Black Film Center/Archive</td>
<td>iub</td>
<td>bfca</td>
<td></td>
</tr>
<tr>
<td>Center for Documentary Research and Practice</td>
<td>iub</td>
<td>cshm</td>
<td></td>
</tr>
<tr>
<td>Indiana University Museum of Archaeology and Anthropology</td>
<td>iub</td>
<td>ewv</td>
<td></td>
</tr>
<tr>
<td>Folklore Collection</td>
<td>iub</td>
<td>folklore</td>
<td></td>
</tr>
<tr>
<td>Government Information, Maps, &amp; Microform Services</td>
<td>iub</td>
<td>gimms</td>
<td></td>
</tr>
<tr>
<td>Indiana University Jacobs School of Music</td>
<td>iub</td>
<td>music</td>
<td></td>
</tr>
<tr>
<td>IU Libraries Moving Image Archive</td>
<td>iub</td>
<td>iulmia</td>
<td></td>
</tr>
<tr>
<td>Latin American Music Center</td>
<td>iub</td>
<td>lamc</td>
<td></td>
</tr>
<tr>
<td>Liberian Collections</td>
<td>iub</td>
<td>lcp</td>
<td></td>
</tr>
<tr>
<td>Lilly Library</td>
<td>iub</td>
<td>lilly</td>
<td></td>
</tr>
<tr>
<td>Paleontology Collection</td>
<td>iub</td>
<td>paleontology</td>
<td></td>
</tr>
<tr>
<td>Modern Political Papers Collection</td>
<td>iub</td>
<td>politicalpapers</td>
<td></td>
</tr>
<tr>
<td>The Kinsey Institute for Research in Sex, Gender and Reproduction</td>
<td>iub</td>
<td>kinsey</td>
<td></td>
</tr>
<tr>
<td>The Media School Archive</td>
<td>iub</td>
<td>mediaschool</td>
<td></td>
</tr>
<tr>
<td>University Archives</td>
<td>iub</td>
<td>archives</td>
<td></td>
</tr>
<tr>
<td>Working Men’s Institute</td>
<td>iub</td>
<td>wmi</td>
<td></td>
</tr>
<tr>
<td>Wylie House Museum</td>
<td>iub</td>
<td>wyliehouse</td>
<td></td>
</tr>
<tr>
<td>Indiana University East Archives</td>
<td>N/A</td>
<td>iueast</td>
<td></td>
</tr>
<tr>
<td>Indiana University Kokomo Campus Archives</td>
<td>N/A</td>
<td>iukokomo</td>
<td></td>
</tr>
<tr>
<td>Indiana University Northwest, Calumet Regional Archives</td>
<td>N/A</td>
<td>iunw</td>
<td></td>
</tr>
<tr>
<td>Indiana University South Bend Archives and Special Collections</td>
<td>N/A</td>
<td>iusb</td>
<td></td>
</tr>
<tr>
<td>Archives and Special Collections, Indiana University Southeast</td>
<td>N/A</td>
<td>iuse</td>
<td></td>
</tr>
<tr>
<td>Ruth Lilly Medical Library</td>
<td>iupui</td>
<td>ruthlillymedical</td>
<td></td>
</tr>
</tbody>
</table>