

Creating a Finding Aid

Updated 2012 August 15

Creating a Finding Aid in Archivist's Toolkit: A Manual for Students

**Texas General Land Office
Daniel Alonzo**

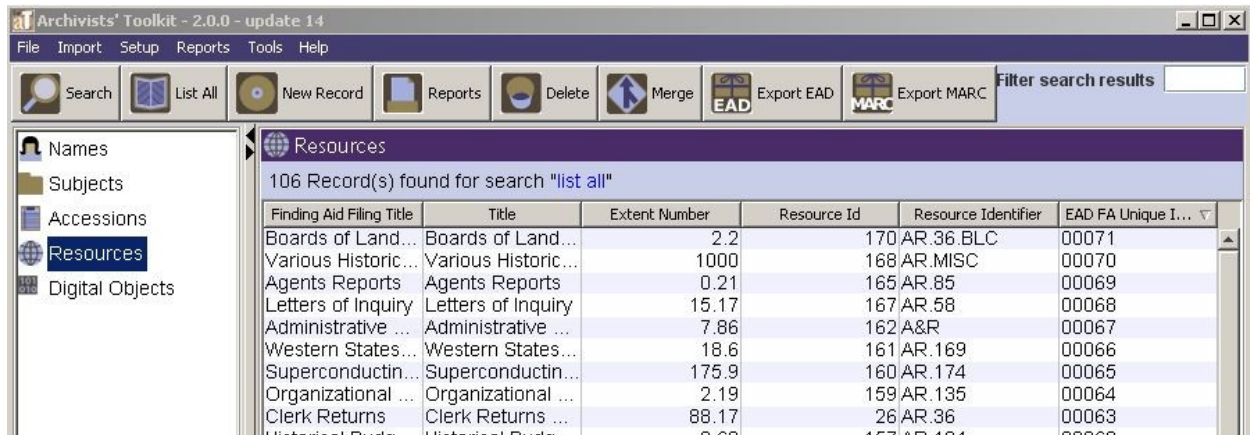
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ACCESSIONS..... 30

The following is a brief guide to creating a finding aid in Archivist's Toolkit (AT) at the Texas General Land Office. Local practices that deviate from *Describing Archives: a Content Standard (DACS)* are explained here as well as general rules. For more detailed formatting explanation please refer to the *DACS Manual*

Introduction



Upon starting up AT, you'll notice on the left panel there are five tabs:

Names: This is where name authority index terms are listed and added. While there are already many entries, you will certainly need to add more for your finding aid.

Subjects: Same format as Names above.

Accession records are kept in this list. If an accession records exists for the collection you can link to it's finding aid through these records.

Resources: This is the list of finding aids and where new ones are created.

Digital Objects: These are catalog records for digital objects kept externally.

COLLECTION SUMMARY

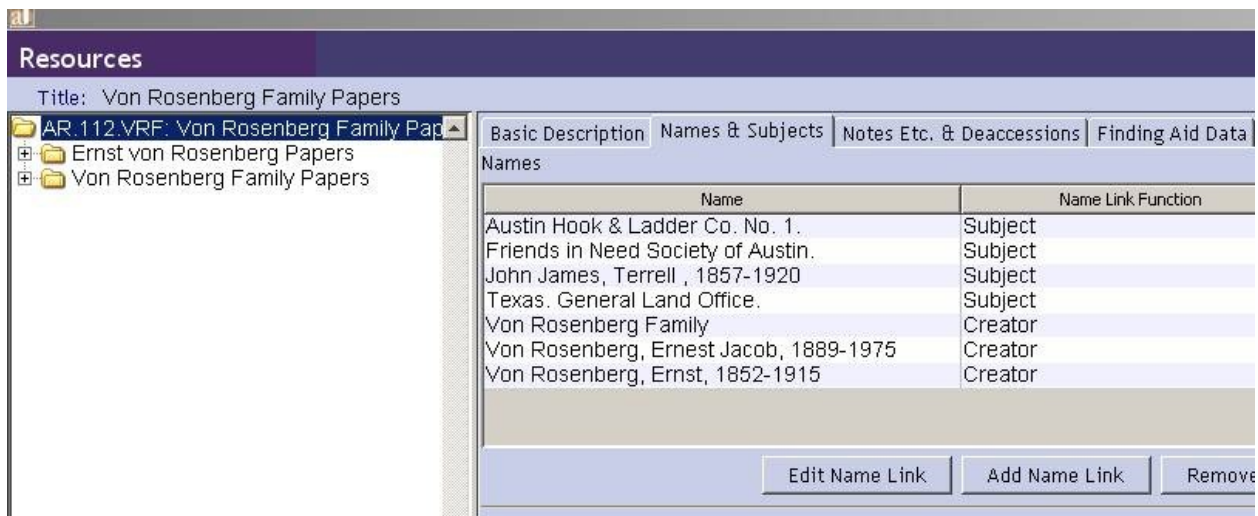
Creator (REQUIRED)

Name of the person, family or corporate body predominately responsible for creating or assembling the collection. For individuals, supply birth and death dates if known. If an organization's records reveal various name changes, the latest form of the name should be used. Remember, any additional names can be recorded in the Index Terms. For example:

Fehr, Arthur, 1904-1969
Schutze family
Allandale Neighborhood Association

Consult DACS for any questions concerning hyphenated names, pseudonyms, nicknames, foreign names, etc.

Creator names should only be added at the Collection level in the Name & Subjects tab.



The screenshot shows the AT interface with the following elements:

- Resources** header
- Title: Von Rosenberg Family Papers
- Navigation tabs: Basic Description, **Names & Subjects**, Notes Etc. & Deaccessions, Finding Aid Data
- Left sidebar: AR.112.VRF: Von Rosenberg Family Papers, Ernst von Rosenberg Papers, Von Rosenberg Family Papers
- Main table:

Name	Name Link Function
Austin Hook & Ladder Co. No. 1.	Subject
Friends in Need Society of Austin.	Subject
John James, Terrell , 1857-1920	Subject
Texas. General Land Office.	Subject
Von Rosenberg Family	Creator
Von Rosenberg, Ernest Jacob, 1889-1975	Creator
Von Rosenberg, Ernst, 1852-1915	Creator

Buttons at the bottom: Edit Name Link, Add Name Link, Remove

Authorized Names can be linked and created from the main window of AT:



Title (REQUIRED)

Supplied titles generally have two parts:

- The name of the creator(s) or collector(s) in normal word order
- The nature of the materials being described (records, papers, photograph album, etc)

Most commonly, you will use “papers” or “records” to describe the nature of the materials. For example: *Name of Organization Records* or *Name of Person Papers*

Allendale Neighborhood Association Records
 Schutze Family Papers
 Ed Anderson Papers
 Smith, Harris and Black Families Papers

The title of the collection should encompass all parts of the group. If the collection consists of just photographs or scrapbooks the title can be more specific than “records” or “papers” but only if the collection is described in its entirety.

There is no period at the end of the title.

For papers created by, collected around, or associated with an individual, the *filing title* entered in AT should begin with that person’s last name, followed by the first name and optional middle name surrounded by parentheses to ensure proper alphabetization. For example:

Anderson (Ed) Papers

There are two places that the Title should be entered at the Collection Level: The Basic Description Tab and the Finding Aid Tab. The Finding Aid Title should be a combination of the Collection Title and the Inclusive Dates (see below).

Resources

Title: Von Rosenberg Family Papers

AR.112.VRF: Von Rosenberg Family Papers

- Ernst von Rosenberg Papers
- Von Rosenberg Family Papers

Basic Description | Names & Subjects | Notes Etc. & Deaccessions | Finding Aid Data

Level: collection

Other Level:

Title: Von Rosenberg Family Papers

Wrap in tag:

Date Expression:

Inclusive Dates: Begin 1871 End 1964

Bulk Dates: Begin 1871 End 1907

Resource Identifier

Accessions linked

Accession Number: 2011.2

Extent

Extent Number

Container Summary: (6 document t

Instances

Resources

Title: Von Rosenberg Family Papers

AR.112.VRF: Von Rosenberg Family Papers

- Ernst von Rosenberg Papers
- Von Rosenberg Family Papers

Basic Description | Names & Subjects | Notes Etc. & Deaccessions

EAD FA Unique Identifier: 00005

EAD FA Location: T:\UNSECURED\2 - RESEARCH\1

Finding Aid Title: Von Rosenberg Family Papers, 1871-1964

Finding Aid Subtitle:

Finding Aid Filing Title: Von Rosenberg Family Papers

Finding Aid Date: 2012-01-11

Author:

Inclusive Dates (REQUIRED)

Enter the beginning and end dates of materials in the collection using the full four-digit format. To display properly on TARO and on the GLO website the Date Expression field must have some kind of entry. However, please always leave bulk dates out of the Date Expression field because AT will duplicate the information upon transformation.

Use the range fields when the dates are known and straightforward.

For example:

1935-1999

Use the range fields when the dates are exact single dates by placing the same year in both ends.

For example:

1935-1935

Use the Date Expression field for single dates expressed as year-month or year-month-day.

For example:

1975 March

1987 June 12

Use the Date Expression field for estimated date ranges using “circa”. For example:

circa 1945-1985

For estimated single dates, estimate the nearest year, decade or other interval as precisely as possible. Use the Date Expression field.

For example:

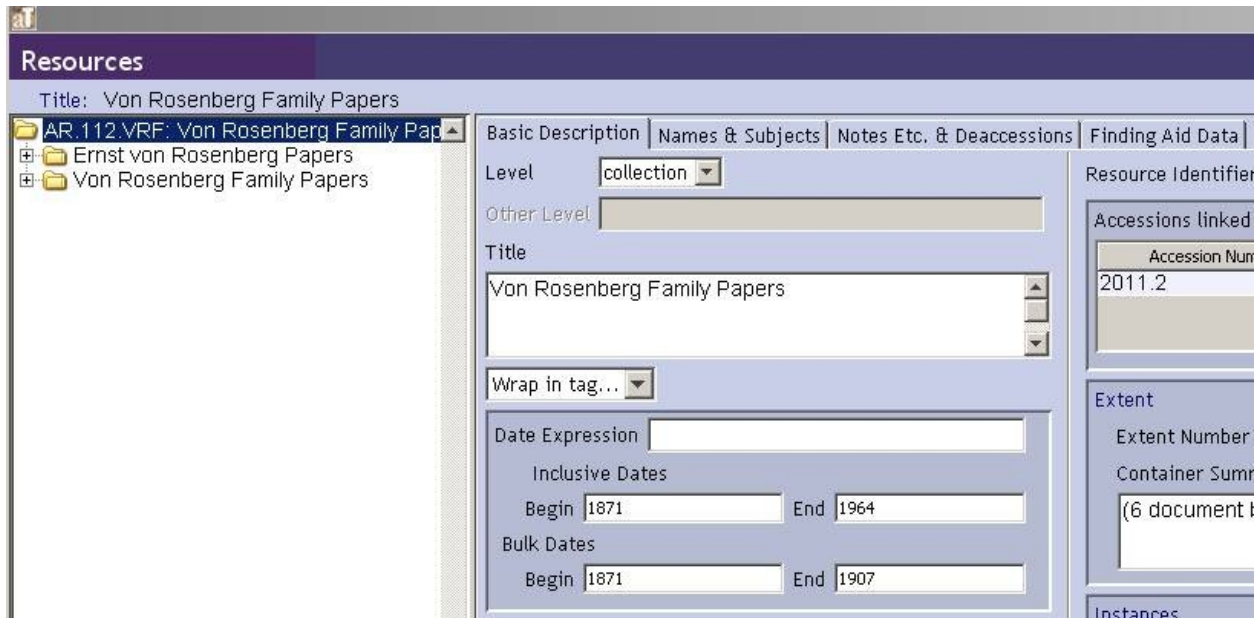
circa 1969

after 1923

before 1892 March

Bulk Dates

Used if the majority of the collection is dated within a narrower timeframe that listed in the Inclusive Dates list. Use the full date format. AT provides a date range for bulk dates. Note that the GLO website will not display bulk dates. If you feel that bulk dates are necessary for display on the GLO website, you can put them in the Date Expression field, but will have to leave them out of the bulk date range field in AT.

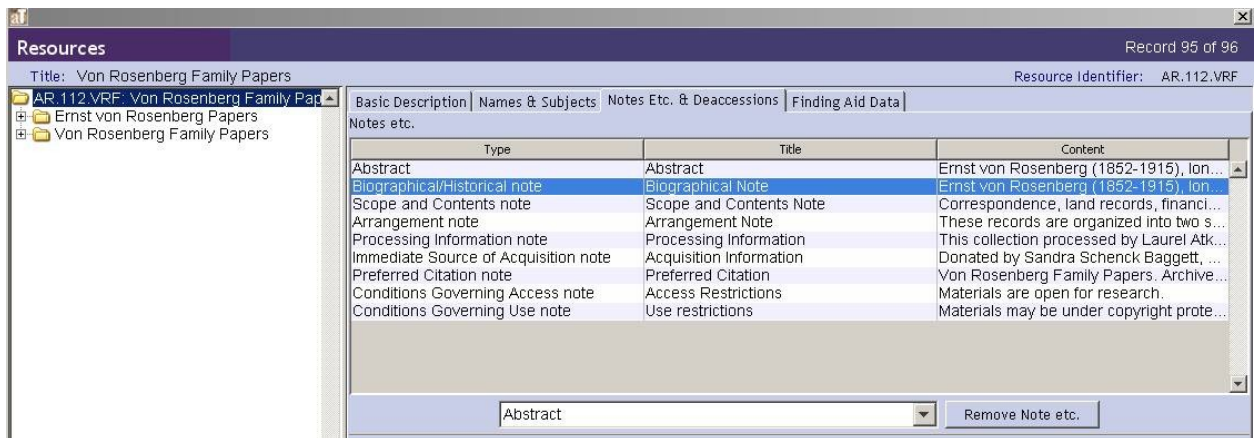


Abstract (REQUIRED)

Brief one or two sentence overview of the creator and the collection. For example:

Fehr and Granger is an award winning architectural firm that conducted business in Austin, Texas from 1938-1972. The collection consists of drawings and photographic material of buildings built in the Austin/Travis County area between the 1930s and 1960s.

The Abstract should only be added at the Collection level in the Notes Etc. & Deaccessions tab.



Accession Number (REQUIRED)

Assigned by the Processing Archivist and should be written on the folder containing the Deed of Gift materials. Collections or items that do not have Accession information, i.e.

materials that have always been in the GLO or do not have paperwork will be given a generic, repeating number that will refer to an accession record in AT that covers all of these materials in a single record.

AT is designed to keep accession records as well. The Finding Aid has to be linked to the Accession Record through the Accession Record window.

Resource Identifier	Resource Title
AR.112.VRF	Von Rosenberg Family Papers

Quantity/Extent (REQUIRED)

Recorded as linear feet and then the number of boxes, ledgers, photographs, etc. in parenthesis if you want to qualify the statement of physical extent by adding the number of boxes or the existence of material types that might be of special interest. Do not use abbreviations. For example:

12 linear feet (6 boxes and 3 ledgers)
9 linear feet (approximately 19,000 photographs)

Only list oversized items, photographs, etc if there are a significant numbers. If there are just a couple photographs interfiled with the collection or a 3 posters separated to a multi-collection qAR box it doesn't have to be listed here (this information will be found elsewhere in the finding aid)

Linear feet measurement – this measurement is intended to indicate how much shelf space is being taken up by the collection.

Legal-size Hollinger (document) box =.40 linear feet

Legal-size Hollinger (document) box, ½ size =.20 linear feet

Cubic foot box = 1.04 linear feet

Oversized Volumes – measure the width of the item as it would be oriented on the shelf. If you are going to stack 2 or more oversized volumes on top of one another then only measure the width once.

Oversized Boxes - measure the width of the item as it would be oriented on the shelf. If you are going to stack 2 or more oversized boxes on top of one another then only measure the width once.

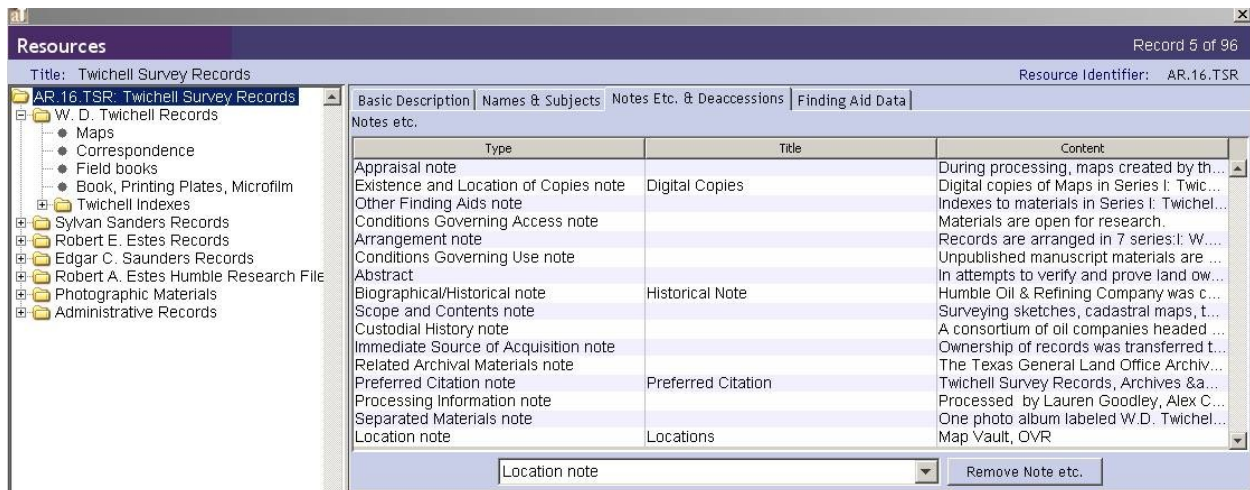
The Extent field should only be used in the Collection Level Basic Description. It should be measured in linear feet. The Container Summary should contain the types and number of boxes used.

The screenshot shows a software interface with two main sections: 'Extent' and 'Instances'.
The 'Extent' section has a text input for 'Extent Number' containing '2.5' and a dropdown menu for 'Linear feet'. Below it is a text area for 'Container Summary' containing '(6 document boxes and 1 oversized box)'.
The 'Instances' section features a table with two columns: 'Instance Type' and 'Instance Label'. The table is currently empty. Below the table are two buttons: 'Add Instance' and 'Remove Instance'. At the bottom left of the 'Instances' section is a checkbox labeled 'Restrictions Apply' which is currently unchecked.

Location (REQUIRED)

List all the collecting units that house items from the collection so researchers and staff are aware that they must check the inventory for exact locations and it is not assumed that everything is located in the archives stacks. For example:

File Vault, Map Vault, OVR



Language (REQUIRED)

Indicate all the languages represented in the collection. The Language field should be filled in the Collection level Basic Description and in the Notes Etc. & Deaccessions tab. The majority of the collections will be in English. Use the following for consistency: **Materials are written in English.**

For collections with multiple languages, use the following formats:

English and Spanish

The collection is primarily in English with some materials in Korean.

Repository (REQUIRED)

Already filled out on AT

TOP LEVEL METADATA

Administrative History or Biographical Sketch

Label in AT: “Biographical Note” for Person and Family Name Creators
“Administrative History” for Corporate Creators

Provide historical and other descriptive information about the individual or agency that created the records. This can include information such as an individual’s death and birth dates or dates and circumstances of an organization’s founding and significant achievements. See DACS for additional information and examples. Remember that you are only trying to put the collection in historical context, not write the definitive history of the person or the organization. For the average finding aid consulting the internet, the Austin File Bio folder or Subject folder is enough. If you are copying information directly from a single source (company website, etc.) add a source note. The Biog/Hist Sketch should only be added at the Collection level in the Notes Etc. & Deaccessions tab.

For example:

Source: Adapted from the Violet Crown Community Works Vision Statement
<http://violetcrowncommunity.org/wp-content/uploads/2010/03/Vision0310.pdf>

Accessed: 2010 August 30

Scope and Contents (REQUIRED)

Label in AT: Scope and Contents of the Records

Type, nature, date and approximate amount of materials to help a researcher judge the collection’s potential relevance. The point here is to describe and analyze the substance of the records. You may also want to point out gaps in the documentation. For smaller collections an overview of the entire collection is acceptable. For larger collection each series should be detailed in subsequent paragraphs. Certain collections are better served with a paragraph outlining the overall content of the collection at the top level with further scope and content notes in the Detailed Description of the Collection at the series level. In AT, an SC can be added to the series through the Notes Etc. & Deaccessions tab. See DACS for further information and examples.

Arrangement of Records (REQUIRED)

Label in AT: Arrangement

Describe the overall organization of the collection. This can be done in a list or a narrative format or a combination of the two. The Arrangement Note should only be added at the Collection level in the Notes Etc. & Deaccessions tab. For example:

Arranged into 5 series:

- I. Biographical information
- II. Correspondence

- III. Financial information
- IV. Photographs
- V. Writings

OR

The records of the Commission came to the GLO with little if any of their original order intact. The organization of the records within the original folders was largely maintained, but the processors created the overall arrangement. Series and sub-series are ordered to forefront records of the greatest expected interest to researchers.

The collection is arranged into five series:

- I. Board of Directors
- II. General Publicity
- III. Fundraising
- IV. Programs and Events
- V. Financial

Related Material

Other sources at the GLO or another local repository that share a common provenance, creator, or subject matter with the collection.

Can be presented in a list or narrative format depending upon the amount of related materials. Can be added in the Notes Etc. & Deaccessions tab. For example:

GLO Vertical Files

GLO-Staff
Commissioners-General
-Allcorn, Bill
-Armstrong, Bob
-Baker, Andrew J.
-Borden, John P.

Archives and Manuscripts

Von Rosenberg Family Papers, 1871-1964 (AR.112.VRF)

OR

Book Collection – 976.4 BIS *Alots of Land*

Separated Material

Materials that were originally part of the collection that have been transferred to a division other than Archives and Records or have been deaccessioned. For deaccessioned items be sure to also update the Deed of Gift form with the disposition details such as “returned to donor”, “discarded” or “book sale.” Can be presented in a list or narrative format depending upon the amount of separated materials. Can be added in the Notes Etc. & Deaccessions tab.

Do NOT use this section if an item is still part of the collection but merely housed in a separate location such as Artifacts, Oversized Volumes, Photography Inner Vault, etc. – this location information is provided in the Detailed Description of the Collection.

Other Finding Aids

Label in AT: “Indexes” (if they are indexes)

This would be for additional guides to the same collection that describe all or parts of the collection. For instance, there might be a published edition of the inventory or the materials may have come to the repository with some sort of inventory prepared by the creator. File plans are formal examples of such finding aides (with a separate element all their own) that sometimes accompany organizational records. Can be added in the Notes Etc. & Deaccessions tab.

Existence and Locations of Originals and/or Existence and Locations of Copies

Label in AT: “Digital Copies” (if they are digital copies)

Location of Originals is used to provide information about the existence, location, and availability of originals where the unit described consists of copies. Both can be added in the Notes Etc. & Deaccessions tab.

INDEX TERMS

Use this section to indicate personal, organizational, or place names with major representation in the collection. Additionally indicate major topics, occupations, functions, titles and document types. Index terms are most effective if terms are used consistently and authority files are consulted. Use the “rule of disappointment” when determining what index terms should be listed – will the user be disappointed in the amount/quality of material in the collections if they are researching a specific subject, organization or person listed in the Index Terms. Index Terms should only be added at the Collection level in the Names & Subjects tab.

Useful links:

Library of Congress Authorities <http://authorities.loc.gov/cgi-bin/Pwebrecon.cgi?DB=local&PAGE=First>

Persons

At the very least this should be the creator of the collection if the creator is an individual. Also list the names of people whose papers form part of the collection. Additionally index the names of people who are important subjects of the collection, including major correspondents. You can also add family names to this category.

Check the GLO Vertical Files or the Names Resources in AT to determine if a local authority record has been created for an individual. For nationally known individuals you can also check the Library of Congress Authorities.

Organizations

This refers to names of businesses, corporations, agencies, etc with major representation in the collection. At the very least this should be the creator if the creator is an organization. You can use this category to index former names of the organization if it has gone through various names changes and there are records in the collection from the time period in which an alternate name was used.

Check the GLO Vertical Files or the Names Resources in AT to determine if a local authority record has been created for an organization. For nationally known organizations you can also check the Library of Congress Authorities.

Places

Locations of materials. Check the GLO Vertical Files or the Names Resources in AT to determine if a local authority record has been created for an organization. For nationally known organizations you can also check the Library of Congress Authorities.

For example:

Austin (Tex.)
Travis County (Tex.)
Hyde Park (Austin, Tex.)

Subjects

Use Library of Congress Authorities to determine proper Library of Congress subject headings. For example:

Silkworms--Diseases.

Documents Types

List of materials. For example:

Textual materials, photographs, slides, sketches, glass photonegatives, specifications, ephemera, architectural drawings

Titles

List any published materials that are left in the collection. In general these will be items will be separated from the collection unless there is extensive annotation in the publication.

ADMINISTRATIVE INFORMATION

Admin Information should only be added at the Collection level in the Notes Etc. & Deaccessions tab.

Access Restrictions

Information about access restrictions due to the nature of the information in the collection, such as those imposed by the donor, the repository, or by statutory/regulatory requirements. For example:

Unrestricted access. (most common)

Use of audio material by appointment only; please contact repository for more information.

Use of video material by appointment only; please contact repository for more information.

Access is restricted; consult repository for details.

Access to oral history recordings requires the production of Access copies.

Birth records in this collection are subject to Texas Senate Bill 861 which restricts all birth records for 75 years.

Use Restrictions

Information about restrictions on reproduction and/or publication due to copyright and/or Texas General Land Office policy, after access has been provided. For example:

Materials may be under copyright protection. US copyright law does allow for reproduction of materials under copyright for uses such as critique, criticism, news reporting, teaching (including multiple copies for classroom use), scholarship, or research. The researcher has full responsibility for determining copyright status, locating copyright holders, and abiding by current copyright laws when publishing or displaying copies of Special Collections material in print or electronic form.

Most records created by Texas state agencies are not copyrighted and may be freely used in any way. State records also include materials received by, not created by, state agencies. Copyright remains with the creator. The researcher is responsible for complying with U.S. Copyright Law (Title 17 U.S.C.).

Some restrictions exist on publication. Consult repository for details.

Custodial History

Information on changes of ownership or custody of material being described if material isn't donated by the creator. For example:

Collection was transferred to the Texas General Land Office from the University of Houston Libraries. The collection was a gift of Mr. Peter Pratt to UHL. UHL was unable to provide any information concerning the provenance of the collection.

Materials were found in the attic of a house on West Avenue.

Preferred Citation [Bibliographic Reference]

[Short title of Document], [Date: Day-Month-Year]. Box [#], Folder [#], p. [#]. [Collection Title [w/o dates] (Collection Number)]. Archives and Records Program, Texas General Land Office, Austin. For example:

[Austin Dam Contract], 1907. Box 5, Folder 7. Von Rosenberg Family Papers (AR.112.VRF). Archives and Records Program, Texas General Land Office, Austin.

Acquisition Information

Immediate source of acquisition. Format the date as either year only or year-month-day. For example:

The Allen McCree Papers were donated to the Texas General Land Office, Archives & Records, by Lynn McCree in 2012.

Processing Information

Used to provide the name and date of processor. Can also be expanded to provide information about the degree to which a collection is processed or any other processing information that might be useful to the user. For example:

Finding aid created and encoded by Molly Hults/2008.

Preliminary Processing by Katie Causier in 2009.

Project numbers for sets of architectural drawings were generated in-house when the information was not provided by the creator. These numbers were created using the last 2 numbers of the year the drawings were created and then a sequential 2 digit

number. For example: BAR-9801 (drawings were created in 1998 and this was the first set of unnumbered drawings).

Digital Copies

Materials have been digitized. See the [Texas General Land Office Land Grant Database](http://www.glo.texas.gov/cf/land-grant-search/index.cfm "Texas General Land Office Land Grant Database") Input:

DETAILED DESCRIPTION OF COLLECTION

When creating a new record in AT, there are 10 levels to choose from: Collection, Series, Subseries, File, Item, Fonds, Sub Fonds, Record Group, Sub Record Group, Class and Other Level which opens a space to provide a name for this other level.

For purposes of simplicity, only use Collection, Series, Subseries, File and Item written here in descending order.

The inventory portion of the finding aid tells the user how the collection is organized and what material is in what container. The inventory is structured hierarchically, from the broadest level of organization of the collection to successively narrower levels. In the EAD code, each level is represented in the inventory by a numbered component level, with <c01> at the broadest level, <c02> at the next level of specificity, and so on to the narrowest level of organization of the collection. While EAD supports up to 12 levels of hierarchy it is advisable to try to avoid going below <06> or <07> to avoid confusing the user (or yourself, for that matter).

Subordinate components, or “children” in AT are nested within superior “parent” components, and hence inherit all of their characteristics.

```
<c01> Broadest level, e.g. series
  <c02> Narrower level, e.g. subseries
    <c03> Narrowest level, e.g. file</03>
    <c03> Narrowest level, e.g. file</03>
    <c03> Narrowest level, e.g. file</03>
  </c02>
</c01>
```

In AT there are nearly the same elements available for all levels of description within the Basic Description and Notes tabs. Below are the recommended fields that should be used for each level.

Collection: See Collection Summary, Top Level Metadata, Index Terms, and Administrative Information in the beginning of this document.

Series: Title, Dates, Container Summary.

Scope and Content Note is optional for large series’ that have multiple sub-series:
AT Label: “Scope and Content of the Series.”

Quantity/Extent field is used only in the Collection Level Basic Description information. However, for large collections where there are multiple series within a collection, it is appropriate to put box types and numbers in the Container Summary field while leaving the linear foot measurement blank. For Example:

(25 flat files, 54 document boxes, 3 oversized boxes)

Please avoid using decimals such as “2.5 document boxes” in the Container Summary. If the Collection is so small that series are sharing box space than it does not warrant using the Container Summary in the Series field.

Sub-Series: Title, Dates

File: Title, Dates (Inclusive or Date Expression only), Instance (Box/Folder)

Item: Title, Dates, Instance (Box/Folder)

Instance is the field where Box and Folder numbers are assigned. Please note that TARO does not support multiple instances. Therefore, if you have an entry that spans more than two non-consecutive boxes, please duplicate the entry with two different instances.

Instance: Internal Only and Restrictions Apply radio buttons:

Restrictions Apply appears to have no effect on the EAD xml so it is probably used when running reports.

Internal Only is a very powerful button. If selected, it will strip out the entry from the EAD. If checked at the series level, it will suppress all subordinate components. Internal Only should only be used for material that is restricted from the public.

The screenshot shows the 'Resources' application window. The title bar indicates 'Record 5 of 96' and 'Resource Identifier: AR.16.TSR'. The main window is titled 'Resources' and contains a tree view on the left with the following structure:

- AR.16.TSR: Twitchell Survey Records
 - W. D. Twitchell Records
 - Twitchell Indexes
 - Twitchell Maps, See Administrative I
 - Twitchell Correspondence, A-Z
 - Twitchell Correspondence, A 1-2 (selected)

The central pane shows the 'Analog Instance' form for 'Record 1 of 1'. The form includes the following fields:

- Level: file (dropdown), Persistent ID: ref540
- Other Level: (empty)
- Title: (empty)
- Component Unique Identifier: (empty)
- Extent: Extent Number (empty), Extent (empty)
- Container Summary: (empty)
- Instances: A table with columns 'Instance Type' and 'Instance Label'. The first row contains 'Text' and 'Box 1 / Folder 1-3'. Below the table are 'Add Instance' and 'Remove Instance' buttons.
- Internal Only: (unchecked)
- Restrictions Apply: (unchecked)

At the bottom of the form are navigation buttons: First, Previous, Next, Last, Cancel, and OK.

APPENDIX

Common Types of Functional and Material Type Record Series

Form and Function

- Architectural records
- Administrative records
- Advertising records
- Campaign records
- Case files
- Committee records
- Conference and convention records
- Court records
- Department files
- Executive board records
- Facilities records
- Family papers
- Financial records
- Fund raising records
- Instructional materials
- Issue files
- Legal records
- Marketing materials
- Meeting records
- Membership records
- Operational records
- Organizational records
- Outreach files
- Personal papers
- Personnel records
- Planning records
- Professional papers
- Project files
- Program records
- Reference files
- Research files
- Subject files

Material Type

Agendas
Albums
Artifacts
Awards
Biographical information
Blueprints
Brochures
Budgets
Bulletins
Bylaws
Calendars
Catalogs
Certificates
Clippings
Contracts
Correspondence
 Family correspondence
 General correspondence
 Personal correspondence
 Business correspondence
 Professional correspondence

Datebooks
Diaries
Diplomas
Drafts
Drawings
Ephemera
Financial records
Forms
Grant proposals
Handouts
Invitations
Journals
Ledgers
Lists
Manuals
Maps
Memoirs
Minutes
Music scores

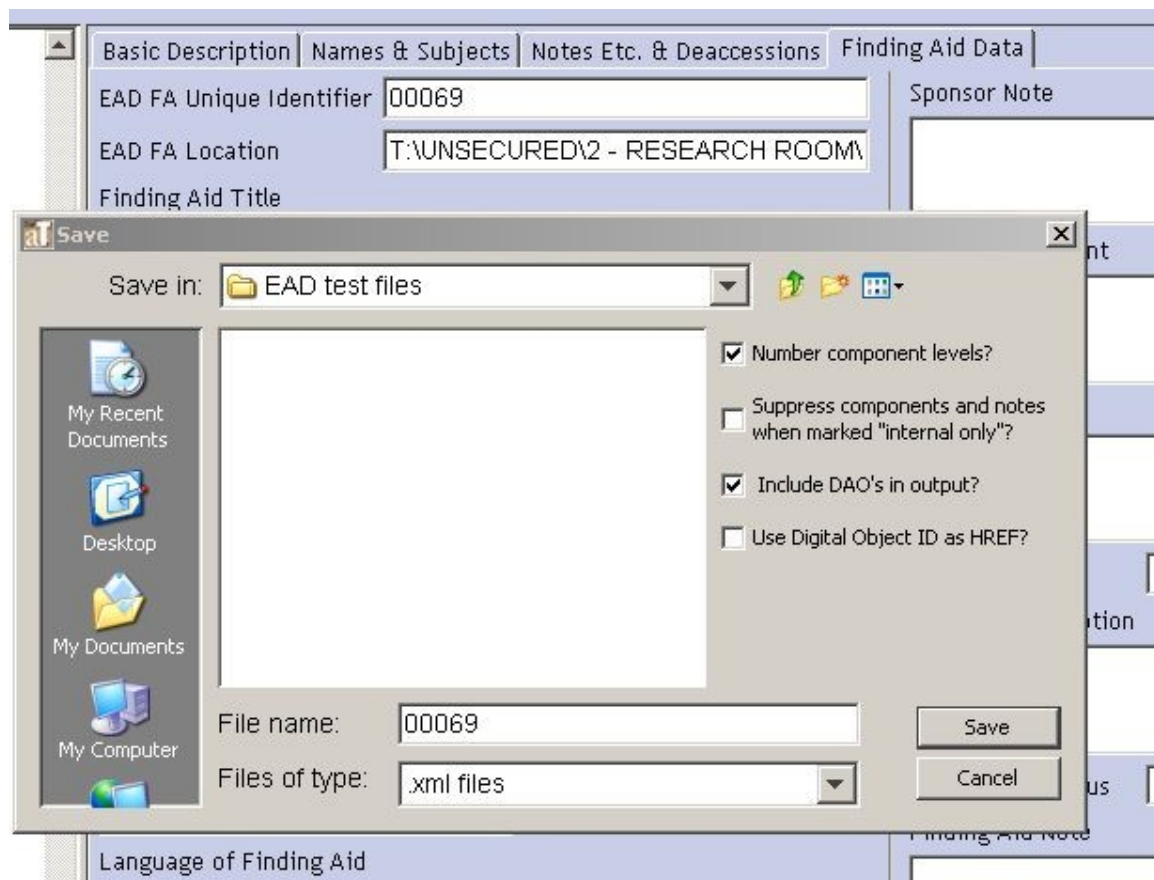
Newsletters
Notes
Oral Histories
Photographs
Plans
Petitions
Policies
Polls
Portraits
Posters
Procedure manuals
Programs
Proposals
Publications
Reports
Schedules
Scrapbooks
Sketchbooks
Slides
Sound recording
Speeches
Transcripts
Video recordings
Websites
Writings

UPLOADING TO TARO

Getting the finding aid out of AT and uploaded onto TARO is a multi-step process.


Exporting from AT

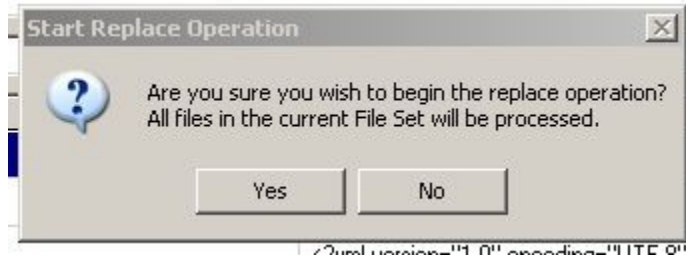
The first step in this process is to export the ead from Archivist's Toolkit. Take the file name from the "EAD FA Unique Identifier" field in the "Finding Aid Data" tab. Be sure that the two options below are checked off.



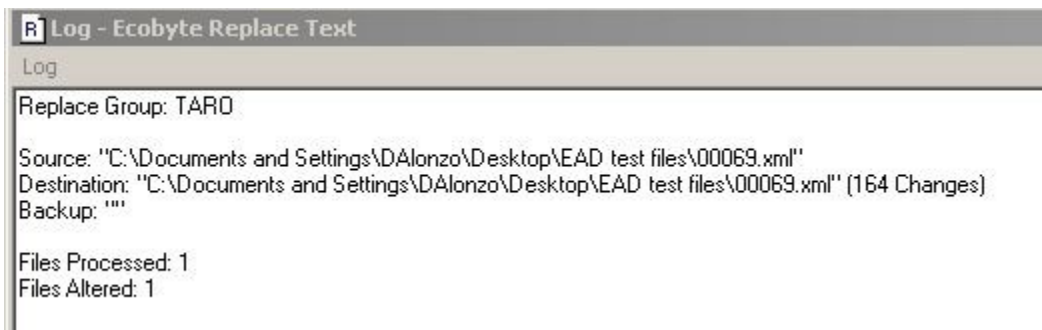
Making TARO-compliant EAD

The next step is to run the file through the batch renamer to make it TARO compliant. Run the "Batch.bkr" file. The above file must be saved to the same location that the batch renamer file points to. In the above example, the file is saved to "EAD test files" on the desktop.

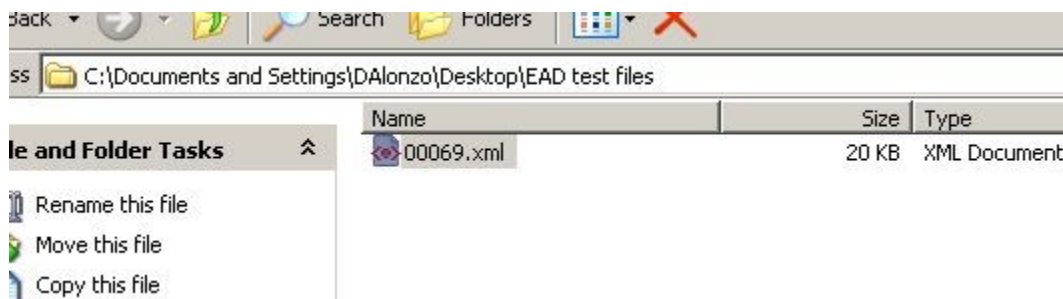
Click on the “Start Replacing” button, , located at the upper right of the program. Then click “Yes” in the following dialog box:



If all goes well, the program will display a status log that looks like this:

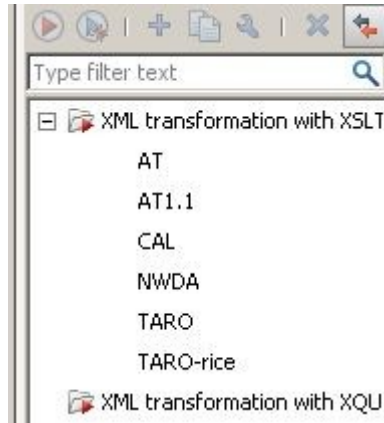


Go to where the now-TARO-compliant EAD files temporarily resides. For this example, it resides on the desktop:



Double click the file to open it in Oxygen so that you can verify that it has no transformation errors (A transformation error will get you an e-mail from the TARO administrator saying that the file couldn’t be posted, delaying progress for another week).

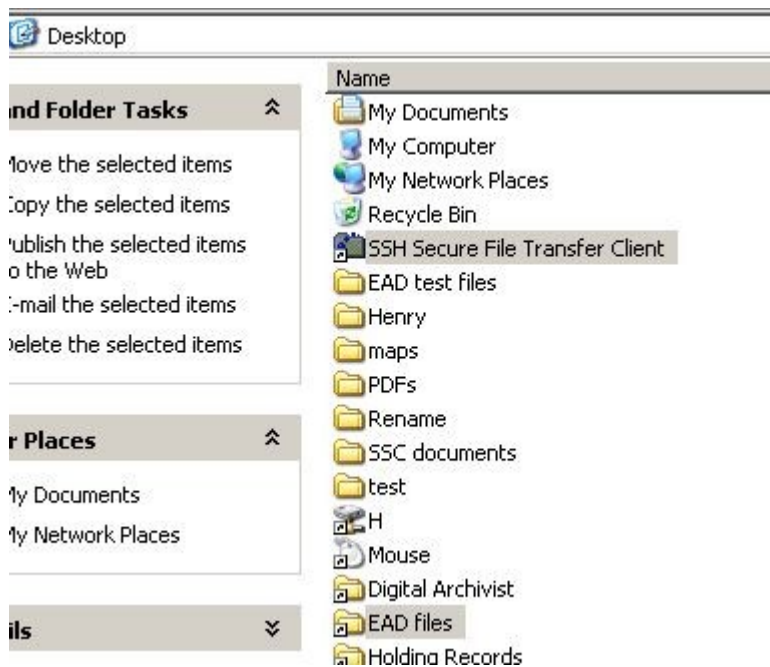
In Oxygen, double click “TARO” in the transformation window:



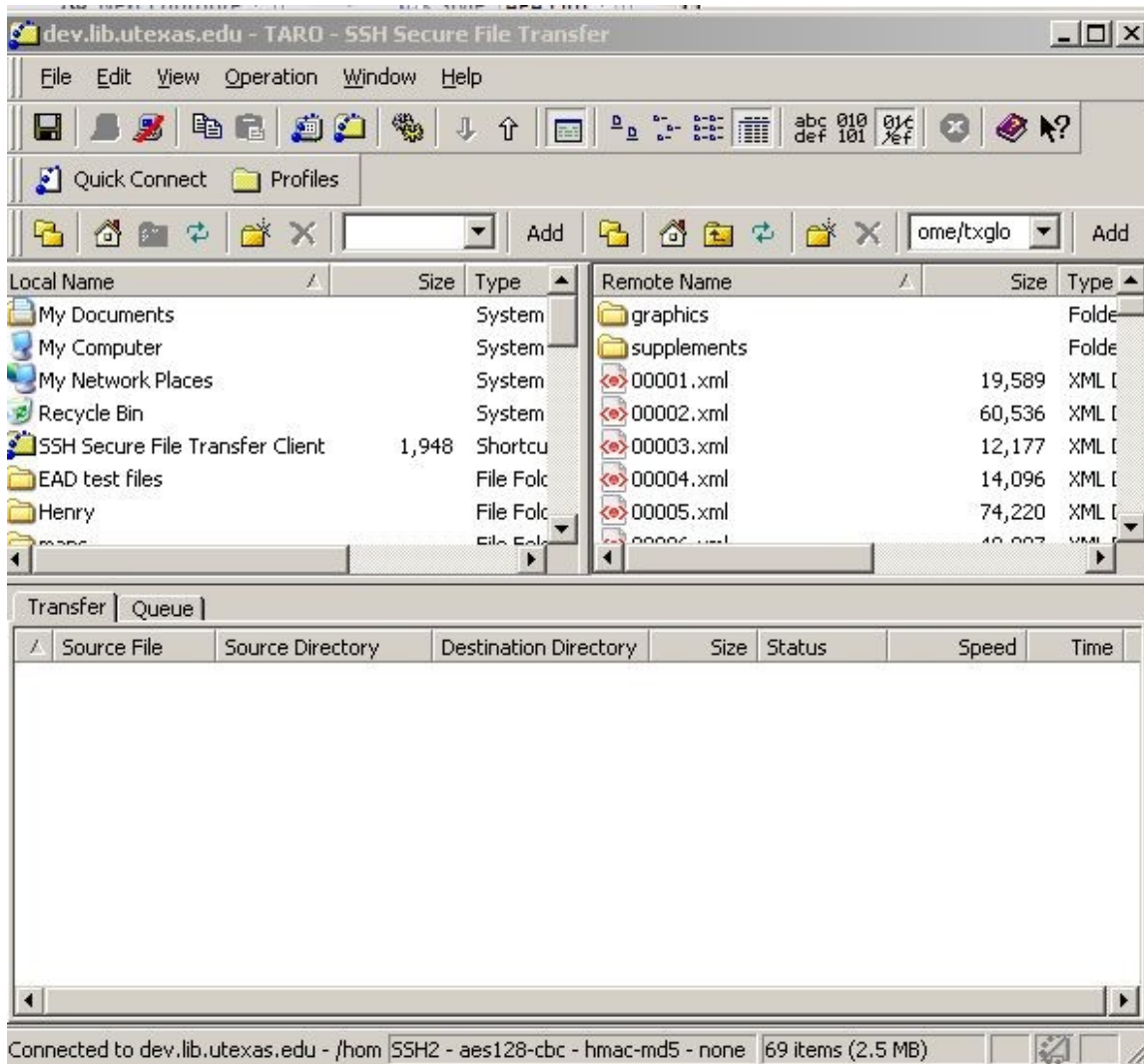
If all goes well, the rendered html will appear in your web browser and look like it does on TARO minus the right-hand side menu.

Uploading to TARO

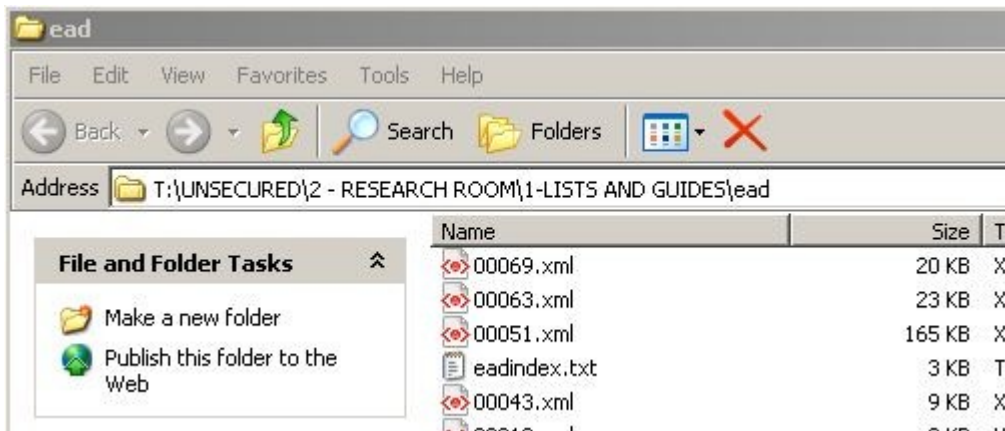
Open “SSH Secure File Transfer Client”. Keep a shortcut on your desktop.



Click on “TARO” in the “Profiles” drop down menu. The password is case-sensitive and without the apostrophes. Drag the xml file into window with all of the other xml files. Close the program.



Move the xml file from it's temporary location in the "EAD test files" folder (or wherever you have designated this temporary location) and into the "ead" folder on the T drive.



ACCESSIONS

Mandatory fields:

Suggested Fields

Basic Information:

Accession Number

Accession Date

Resource Type

Title

Extent

Date

Locations

Accession Notes:

Acquisition Type

External Documents – links to docushare, TARO, land grants, or maps database

Disposition Note – “physical object not found,” “no deed of gift,” etc.

User Defined Fields:

Donor Name [Lastname, Firstname]

Summary of Accession File

Purchase Price

Names & Subjects

Acknowledgements, Restrictions & Processing Tasks

Agreement Received

Agreement Received Date