

ArchivesSpace guidelines for TARO participation

Version 1.0, April 2016. Questions? Contact Amanda Focke, afocke@rice.edu

Contents

Part 1: TARO-friendly settings in your “repository” in ArchivesSpace.....	1
Part 2: For each finding aid	2
Part 3: Helpful tips for the ArchivesSpace environment for TARO participants.....	3

Note: This document assumes familiarity with the TARO Standards and Best Practice Guidelines (<http://bit.ly/1Wk6p6W>).

Part 1: TARO-friendly settings in your “repository” in ArchivesSpace

Using admin permissions, go to the settings for your “repository” in ArchivesSpace. This will be accessed via the System pull-down and selecting Manage Repositories, select the repository you are working on (you may only have one). Choose “edit”.

- Under “Repository Fields” in the field called Organization / Agency Code, type in your [MARC organization code](#).
- Make sure that the country code is set as United States.

This will help make sure that in your exported XML for a finding aid, the <eadid> tag attributes will be correctly set.

The screenshot shows the ArchivesSpace interface for editing a repository. The breadcrumb trail is: Home / Repositories / Woodson Research Center, Rice University, Houston, Texas / Edit. The repository name is 'Woodson Research Center, Rice University, Houston, Texas'. Under the 'Repository Fields' section, the following fields are visible:

- Repository Short Name: WOODSON
- Repository Name: Woodson Research Center, Rice University, Houston, Texas
- Organization / Agency Code: tsr (highlighted in yellow)
- Parent Institution Name: Fondren Library, Rice University
- Country: United States

Part 2: For each finding aid

1.) When creating a finding aid (“Resource”) in ArchivesSpace, enter the TARO unique id in the section Finding Aid Data, in the field called EAD ID.

This value uses this pattern --- urn:taro:[yourrepositorycode]:#####

- for example at Rice University's Woodson Research Center for filename 00845 it would be *urn:taro:rice.wrc.00845*.
- or for Lamar University for filename 00012.xml, it would be *urn:taro:lamar.00012*
- More info on what your TARO-specific repository code is and [how TARO filenames work](#)

Finding Aid Data

EAD ID	urn:taro:rice.wrc.00002
EAD Location	
Finding Aid Title	Guide to the James Lockhart Autry Family Papers, 1832-1998

2.) To export the finding aid for contribution to TARO, go to Export – Download EAD, **and be sure to check the box for “Use numbered <c> tags”**. The file will download, and you should save it to a local folder while you do the final preparation step for TARO before uploading.

Save Add Event Publish All View Published Export Merge Suppress Delete

James Lockhart Autry Family Pa

Basic Information

Title * James Lockhart Autry Family Papers

Download EAD

Download MARCXML

Download Container Labels

Print Resource To PDF

Include unpublished

Include <dao> tags

Use numbered <c> tags

3.) Final preparation step once the XML file is exported: rename the file to match your EAD ID.

In the example shown above, the info in the EAD ID field is urn:taro:rice.wrc.00002, so the file name for this XML file going to TARO will be 00002.xml.

4.) Your file is ready for upload to TARO. Use the Secure Shell Transfer client or some other secure method such as FTP to access your TARO directory and drop the file into your directory.

Part 3: Helpful tips for the ArchivesSpace environment for TARO participants

It may be useful to set ArchivesSpace to display the EAD ID field when browsing Resources, like this, so that it is possible to sort the list of Resources by EAD ID #.

Resources

Showing 1 - 10 of 11 Results

	Title	EAD ID	Finding Aid Status	Identifier
<input type="checkbox"/>	James Lockhart Autry Family Papers	urn:taro:rice:wrc.00002	Completed	MS 003

It may also be useful to track the date of your latest TARO update for any given file, by adding that info to a field such as in the section Basic Information, in the field Repository Processing Note.

Save Add Event Publish All View Published Export Merge Suppress Delete

James Lockhart Autry Family Papers Resource

Basic Information

Title * James Lockhart Autry Family Papers

Identifier * MS 003

Level of Description * Collection

Resource Type Papers

Language English

Publish?

Restrictions?

Repository Processing Note 2015-04-03 TARO update

Important notes about using “level” in the container list:

It is necessary to follow logical “levels” in the container list, or the exported XML may be invalid. A top level series may not contain series, for example – it should contain subseries, or file, or item as the next logical level below.

ArchivesSpace as of April 2016 does not have a “level” choice for a Sub-subseries in the container list. If you have a Sub-subseries, you just choose “Other Level” and then type in “Sub-subseries”.

Known problems with links displaying in ArchivesSpace’s public interface and in TARO exports

ArchivesSpace has known problems with displaying links as live links. We are exploring how to work around this for TARO purposes.