Finding Aids Management

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Permissions

If you are a TARO Admin, then you will see the entire list of repositories when adding a Repository to a Finding Aid. If you are a content manager, then you will only see the repository that your account is associated with. Depending on your permission level, the left hand nav bar and site verbiage may differ from the images in this documentation.

Actions present in this documentation assume that you are logged into your TARO account.

Adding a Finding Aid

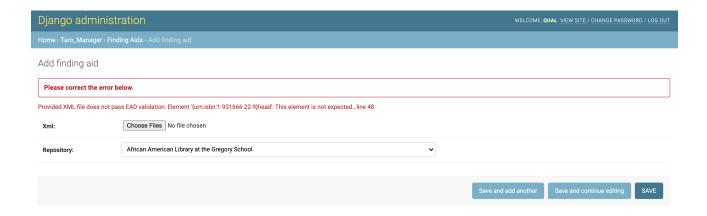
1. Navigate to https://txarchives.org/admin/taro_manager/findingaid/add/ or select "Add" next to Finding Aids.



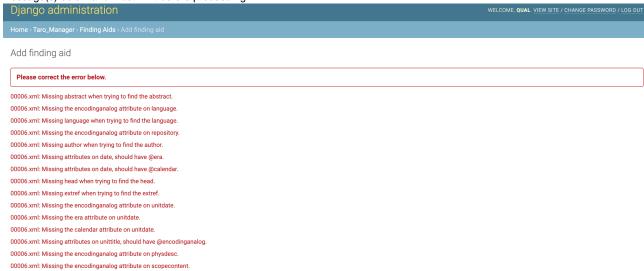
2. Click "Choose Files" to add one or more xml files from your computer. Note that a batch is truly treated as a batch and not as individual Finding Aids. Individual file issues will prevent successful uploading of a batch.



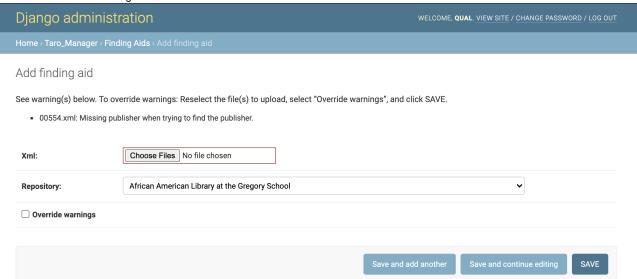
- 3. Select your repository and click "SAVE."
- 4. Upon upload, the finding aid will **first** be checked for **EAD validation**. If it fails, you will get the **error** message below and must fix it before proceeding.



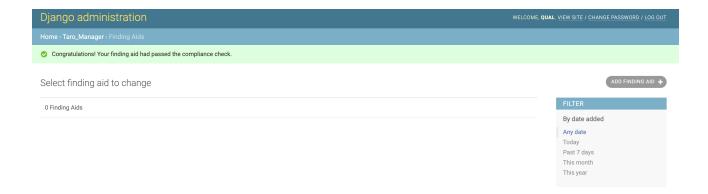
5. When the finding aid passes EAD validation, it is **next** checked for **required fields**. If it fails the compliance check, you will get the **error** message(s) below and must fix it before proceeding.



6. When the finding aid passes the compliance check, it is **last** checked for **recommended fields**. Since these fields are recommendations, you will see a **warning** with a list of missing fields. You must reselect file(s), check "Override warnings," and click SAVE to override the warning.

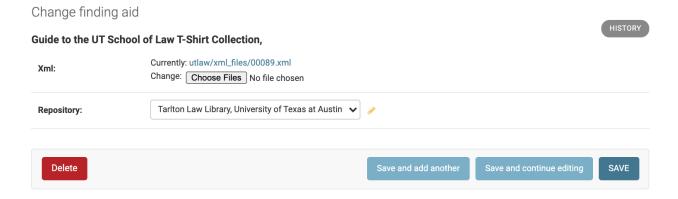


7. When the finding aid passes the compliance check, you will receive a success message and can repeat the process as needed.



Replacing an existing Finding Aid

- 1. Navigate to https://txarchives.org/admin/taro_manager/findingaid/ or select "Finding Aids" on the left nav bar or on the main page (https://txarchives.org/admin/).
- 2. Select the Finding Aid to edit.
- 3. There are two options on the Change Finding Aid form: XML file or Repository.
- 4. To update the finding aid, select "Choose Files" and select from your computer which file you want to replace the current XML file. Note: You can view the current XML in the browser by clicking the filename after "Currently".

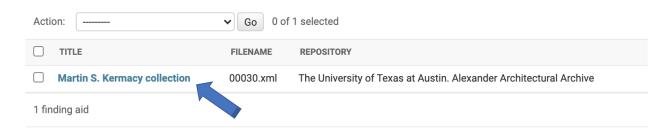


- 5. To update the repository, select the new repository from the drop down. Note: You will only have access to the repositories that your account is associated with.
- 6. Make your update(s) and select "Save".

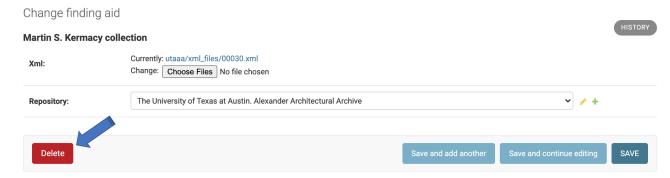
Deleting a Finding Aid

- Navigate to https://txarchives.org/admin/taro_manager/findingaid/ or select "Finding Aids" on the left nav bar or on the main page (https://txarchives.org/admin/).
- 2. Select the Finding Aid(s) that you want to delete by select the checkbox to the left of the filename.

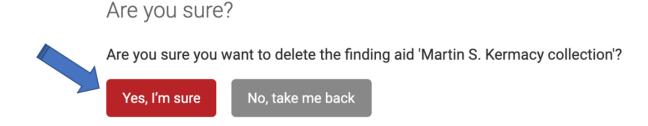
Select finding aid to change



3. Select the Finding Aid that you want to delete and select the "Delete" button on the bottom left.



4. You will then be taken to a confirmation prompt. If information looks correct, select "Yes, I'm sure" to confirm.



5. No confirmation message will appear but the Finding Aid should not show up in the your list anymore.

Delete Multiple Finding Aids

- 1. Navigate to your list of Finding Aids or go to https://txarchives.org/admin/taro_manager/findingaid/.
- 2. Select the Finding Aids that you want to delete by checking the boxes.

Select finding aid to change



When you are done select all the Finding Aids that you want to delete, select the "Delete selected Finding Aids" from the Action dropdown and hit Go.



4. You will then be taken to a confirmation prompt with the list of Finding Aid titles. If information looks correct, select "Yes, I'm sure" to confirm.

Are you sure?

Are you sure you want to delete the selected Finding Aids?

Finding Aids

Guide to the UT School of Law T-Shirt Collection, Guide to the UT School of Law Class Composites,

Yes, I'm sure

No, take me back

5. No confirmation message will appear but the Finding Aid should not show up in the your list anymore.

Video with Workflow

Upload Finding Aid and Create New Repository Demo