

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.**

A screenshot of the Django administration page for adding a finding aid. The page has a blue header bar with 'Django administration' on the left and 'WELCOME, QUAL VIEW SITE / CHANGE PASSWORD / LOG OUT' on the right. Below the header is a breadcrumb trail: 'Home > Taro_Manager > Finding Aids > Add finding aid'. The main content area is titled 'Add finding aid'. It contains a form with two fields: 'Xml:' with a 'Choose Files' button and 'No file chosen' text, and 'Repository:' with a dropdown menu and a small icon. At the bottom right of the form are three buttons: 'Save and add another', 'Save and continue editing', and 'SAVE'.

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.

Django administration
WELCOME, **QUAL** VIEW SITE / CHANGE PASSWORD / LOG OUT

Home > Taro_Manager > Finding Aids > Add finding aid

Add finding aid

Please correct the error below.

Provided XML file does not pass EAD validation: Element '{urn:isbn:1-931-666-22-9}head': This element is not expected., line 48

Xml:
 No file chosen

Repository:
African American Library at the Gregory School

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.

Django administration
WELCOME, **QUAL** VIEW SITE / CHANGE PASSWORD / LOG OUT

Home > Taro_Manager > Finding Aids > Add finding aid

Add finding aid

Please correct the error below.

00006.xml: Missing abstract when trying to find the abstract.

00006.xml: Missing the encodinganalog attribute on language.

00006.xml: Missing language when trying to find the language.

00006.xml: Missing the encodinganalog attribute on repository.

00006.xml: Missing author when trying to find the author.

00006.xml: Missing attributes on date, should have @era.

00006.xml: Missing attributes on date, should have @calendar.

00006.xml: Missing head when trying to find the head.

00006.xml: Missing extref when trying to find the extref.

00006.xml: Missing the encodinganalog attribute on unitdate.

00006.xml: Missing the era attribute on unitdate.

00006.xml: Missing the calendar attribute on unitdate.

00006.xml: Missing attributes on unittitle, should have @encodinganalog.

00006.xml: Missing the encodinganalog attribute on physdesc.

00006.xml: Missing the encodinganalog attribute on scopecontent.

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.

Django administration
WELCOME, **QUAL** VIEW SITE / CHANGE PASSWORD / LOG OUT

Home > Taro_Manager > Finding Aids > Add finding aid

Add finding aid

See warning(s) below. To override warnings: Reselect the file(s) to upload, select “Override warnings”, and click **SAVE**.

- 00554.xml: Missing publisher when trying to find the publisher.

Xml:
 No file chosen

Repository:
African American Library at the Gregory School

☐ **Override warnings**

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

Django administration
WELCOME, QUAL VIEW SITE / CHANGE PASSWORD / LOG OUT

Home » Taro_Manager » Finding Aids

✔ Congratulations! Your finding aid had passed the compliance check.

Select finding aid to change

ADD FINDING AID +

0 Finding Aids

FILTER

By date added
Any date
Today
Past 7 days
This month
This year

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”.

Change finding aid

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

Xml:
Currently: [utlaw/xml_files/00089.xml](#)
Change: No file chosen

Repository:

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

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(s) that you want to delete by select the checkbox to the left of the filename.

Select finding aid to change

Action: 0 of 1 selected

<input type="checkbox"/>	TITLE	FILENAME	REPOSITORY
<input type="checkbox"/>	Martin S. Kermacy collection	00030.xml	The University of Texas at Austin. Alexander Architectural Archive

1 finding aid

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

Change finding aid

Martin S. Kermacy collection

HISTORY

Xml: Currently: [utaaa/xml_files/00030.xml](#)
Change: [Choose Files](#) No file chosen

Repository: [The University of Texas at Austin. Alexander Architectural Archive](#)

Delete

Save and add another

Save and continue editing

SAVE

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

Are you sure?

Are you sure you want to delete the finding aid 'Martin S. Kermacy collection'?

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.

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

Action: [-----](#) Go 2 of 89 selected

<input type="checkbox"/>	TITLE	FILENAME	REPOSITORY
<input checked="" type="checkbox"/>	Guide to the UT School of Law T-Shirt Collection,	00089.xml	Tarlton Law Library, University of Texas at Austin
<input checked="" type="checkbox"/>	Guide to the UT School of Law Class Composites,	00088.xml	Tarlton Law Library, University of Texas at Austin
<input type="checkbox"/>	Guide to the Dorothy C. Most University of Texas Scrapbook,	00087.xml	Tarlton Law Library, University of Texas at Austin
<input type="checkbox"/>	Guide to the UT School of Law Student Publications,	00086.xml	Tarlton Law Library, University of Texas at Austin
<input type="checkbox"/>	Guide to the Yearbooks of the University of Texas at Austin,	00085.xml	Tarlton Law Library, University of Texas at Austin
<input type="checkbox"/>	Guide to the UT School of Law Commencement Announcements,	00084.xml	Tarlton Law Library, University of Texas at Austin
<input type="checkbox"/>	Guide to the Corwin W. Johnson Papers,	00083.xml	Tarlton Law Library, University of Texas at Austin
<input type="checkbox"/>	Guide to the Arthur L. Moller Papers,	00082.xml	Tarlton Law Library, University of Texas at Austin
<input type="checkbox"/>	Guide to the Yearbooks of the University of Texas School of Law,	00081.xml	Tarlton Law Library, University of Texas at Austin
<input type="checkbox"/>	Guide to the Richard Keeton Papers on Representation of John Connally,	00035.xml	Tarlton Law Library, University of Texas at Austin
<input type="checkbox"/>	Guide to the John B. Frank Papers on Supreme Court Nominations	00034.xml	Tarlton Law Library, University of Texas at Austin

3. 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.

Select finding aid to change

Action: ☒ ----- 0 2 of 89 selected

Delete selected Finding Aids

<input type="checkbox"/>	TITLE	FILENAME	REPOSITORY
<input checked="" type="checkbox"/>	Guide to the UT School of Law T-Shirt Collection,	00089.xml	Tarlton Law Library, University of Texas at Austin
<input checked="" type="checkbox"/>	Guide to the UT School of Law Class Composites,	00088.xml	Tarlton Law Library, University of Texas at Austin
<input type="checkbox"/>	Guide to the Dorothy C. Most University of Texas Scrapbook,	00087.xml	Tarlton Law Library, University of Texas at Austin
<input type="checkbox"/>	Guide to the UT School of Law Student Publications,	00086.xml	Tarlton Law Library, University of Texas at Austin
<input type="checkbox"/>	Guide to the Yearbooks of the University of Texas at Austin,	00085.xml	Tarlton Law Library, University of Texas at Austin
<input type="checkbox"/>	Guide to the UT School of Law Commencement Announcements,	00084.xml	Tarlton Law Library, University of Texas at Austin
<input type="checkbox"/>	Guide to the Corwin W. Johnson Papers,	00083.xml	Tarlton Law Library, University of Texas at Austin

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](#)