ArchivesSpace guidelines for TARO file uploads

Version 2.0, Nov. 2025 Questions? Contact Amanda Focke, afocke@rice.edu

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Note: This document assumes familiarity with the TARO Standards and Best Practice Guidelines (https://sites.utexas.edu/taro/creating-ead-for-taro/best-practices/).

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.
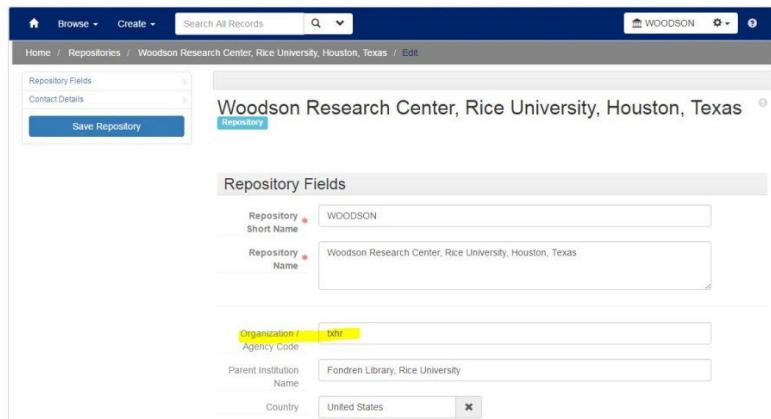
Part 2: For each finding aid

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

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.

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 #.

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.

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".

Part 4: Lyrasis ArchivesSpace Plug-in for TARO

If your repository is hosted at Lyrasis:

Contact your representative and ask to have this plug-in stalled for your repository.

If your repository hosts ArchivesSpace locally : Download and install the plug-in customized for TARO, available at https://github.com/lyrasis/TARO-ead-exporter. The GitHub site includes the installation instructions. Once installed, the standard EAD export tool in ArchivesSpace will export TARO-compliant EAD XML.

It will be necessary to change the filename of the exported file to the 5-digit TARO filename. After changing the filename you should be able to upload the file to TARO in the normal manner.

Reminders:

- If the TARO ingest tool gives warnings about the file, you may still upload the file, after clicking the box to ignore warnings.

- If the TARO ingest tool reports errors, those will have to be corrected in the XML file. Using the TARO Best Practices Guidelines will be helpful, along with the specific error reported in the TARO ingest tool.