Processing for the Web
1. **POLICY:**

All newly created and approved UMC Archives finding aids will be posted to the appropriate Record Group and Record Subgroup pages on the Archives Web page.

2. **PURPOSE:**

All University Archive collections will be described in HTML finding aids, for the purpose of enhancing user awareness of and access to the holdings of the University Archives.

3. **SCOPE:**

This policy applies to all University of Missouri - Columbia staff members and student workers.

4. **RESPONSIBILITIES:**

4-1. It is the responsibility of the University Archivist to approve all newly created finding aids prepared for posting to the Web site.

4-2. The Technical Services Archivist under the direction of the University Archivist constructs, updates and maintains the HTML files, WWW directories, templates, HREF links, and JPEG and GIF image files which comprise the University Archives Web site. The Technical Services Archivist also documents and communicates to the rest of the staff any changes or updates in templates or posting procedures.

4-3. All Archives staff and student workers are responsible for posting approved finding aids to the Web site, according to the procedures outlined below.

5. **DEFINITIONS:**

5-1. **WS-FTP** - File Transfer Protocol. A program used to transfer files from a local PC to the UM-System Web file server.


5-3. **HREF** - an HTML attribute used to specify the URL of any valid document or image for retrieval and display by the web browser.

5-4. **HTML** - Hypertext Markup Language. A document-layout and hyperlink-specification language. It defines the syntax and placement of special, embedded directions that tell a Web browser how to display the contents of a document. HTML is a subset of the more general SGML, Specialized General Markup Language.

5-5. **Remote Web Site** - The HTML files and directories for the University Archives Web site maintained on
a Web File Server by UM-Systems Computer Support unit.

5-6. Local Web Site - The HTML files and directories resident on the local WS-FTP directory on the hard-drives of individual PCs in the University Archives. When files have been edited, reviewed, and approved they are transferred to the Remote Web Site using WS-FTP.

5-7. CD-R - The recording media used to copy the Remote Web Site files resident on the UM-System Web File Server for security and protection reasons. The notation stands for Compact Disc - Recordable.

6. PROCEDURES:

6-1. Each finding aid must have a file name that fits it within the Archives' system.

6-1-1. The file name distinguishes whether the record is a Columbia or a University Wide record, what Record Group it belongs to, and its Subgroup number. The file name c-rg1-s2.html indicates that the record is a Columbia campus record, the item is part of Record Group #1, and it is Subgroup #2. Some Record Subgroups are so large that finding aids are prepared individually for the Series of the Subgroups. The file name c-rg1-s2-1.html indicates that the finding aid describes Series#1 of Record Group #1, Subgroup #2. A uw in place of the e indicates the item is a University Wide record. The Subgroup number is derived from the Web Postings Book; each Record Group has its own table of Web files created and loaded on the server, and the number is chosen as the next chronological number available.

6-1-2. Files that deal with policies, procedures, and other subjects dealing with the administration of the Archives, have names that indicate what they are, e.g., holdings.html for the Holdings title page and coll-pol.html for the Collection Policy and Donor Information page. Try to use no more than eight characters before the .html suffix, if possible.

6-1-3. Files that make up Internet exhibits will be named descriptively and stored in the main Web site directory. Images used in exhibits and in finding aids are stored in the Images directory of the remote Web site.

6-2. In order to transfer the finding aid file from the computer to the systems account for the Internet, you need to enter the WS-FTP program. Either click on the appropriate icon on your computer screen, or go through the Programs Menu.

6-2-1. When the WS-FTP screen appears, set Profile Name as system.missouri.edu.

6-2-2. Set Host Name/Address as system.missouri.edu.

6-2-3. Set Host Type as UNIX [standard].

6-2-4. Set User ID as your e-mail id, i.e. hollardm.

6-2-5. Enter the archives password.

6-2-6. You are in the University Archives' account.

6-3. The window on the left shows the contents of the local WS-FTP; the window on the right shows the contents of the Archives' Systems account. Locate the file you wish to post to the Server (whether on drive c or drive a), and click on it to highlight it. Make sure the right hand window near the top shows that you are in the / directory. Click on the arrow in the middle of the screen that points to the right. The file is then copied over to the Remote Web Site on the UM-System File Server.

6-4. Uploading images is exactly like uploading HTML files, except that the directories involved are different. When you connect the server using WS-FTP and before you transfer files, you will need to
change to the images directories on both the local computer and the Remote Web Site. Locate the images file on each window and double click to change to that directory. Then, highlight the file you want to transfer, and click the right arrow to send it over. This action copies over and erases old files with the same html file name. Remember to keep track of what directories you are in on both computers, so that you only put HTML files in the / directory and images (.jpg, .gif) in the images directory.

6-5. Be careful when transferring files between systems, so that new versions are not mistakenly replaced or overwritten with older versions. The staff member doing the posting must always remember that to double-click on any file name while logged in to the remote server and the local FTP system will result in the copying of that file from the designated (highlighted) location to the other location.

6-6. The HTML and Image files on the Remote Web Site are backed up on CD-R media monthly. The copies are maintained in 726 Lewis Hall.

Return to the Table of Contents

(Revised: 15 August 2002)
UCR Special Collections & Archives Department

Workflow for Adding Manuscript Collection Information to the Web

1. Collection is processed and input into the Archivists’ Toolkit.
2. Collection information (front matter/container list) is exported into Encoded Archival Description (EAD) using the Archivists’ Toolkit.
3. The exported EAD file is modified using the Oxygen XML Editor to conform to the Online Archive of California’s (OAC) Best Practice Guidelines and to our department’s own formatting style.
4. The Oxygen XML Editor is used to validate the EAD file and make sure that it is well-formed.
5. Collection title, number, and a brief description is added to the Archives portion of the Special Collections website; links to the EAD finding aid and MARC collection record are added when made available online (this webpage is currently being re-designed and should be live by Summer 2008).
6. EAD finding aid is uploaded to the California Digital Libraries (CDL) server for display on OAC.
7. EAD finding aid is uploaded to the Archives portion of the Special Collections website using an XSLT style sheet (this will be implemented with the re-design).
8. Collection information (general description) is exported to MARC format (in an XML file) using the Archivists’ Toolkit.
9. The XML MARC file is sent to the Cataloging department along with a URL for the online finding aid to be added to the 856 field in MARC (discussions are underway as to whether this will remain the OAC finding aid or change to our locally hosted version upon completion of the re-design).
10. The Cataloging department modifies the MARC record as needed and incorporates this record into OCLC and our local OPAC.

E. Milenkiewicz 3/14/2008
Web Publication Checklist

Previously unpublished material must be approved by your area’s Principal Librarian, or Coordinator for Statewide Library Services (DLD), or his or her designee. (Please complete Items 1 - 10 below.)

Existing pages that are being updated must be approved by the appropriate Associate Librarian for that subject area. (Please complete at least Items 8-10 below).

Every new or updated page sent to the Web Administrators for publication to the Web site should include this cover sheet (or the electronic version), indicating appropriate approval as described above (and in Approval of Web Materials.)

Send completed Web Publication Checklist to: Web Administration, Computer Applications Group, New York State Library (Basement, CEC).

Or, you may prefer to use the Online Version of Web Publication Checklist.

General Information

1. Is this page:
   _____ standalone, or
   _____ part of a series or section of pages?

2. Does this page supercede an existing page? ___Yes ___No
   If Yes, what page?
   URL: ____________________________________________

3. What Web page will contain the main link to this page?
   What other Web page(s) should contain a link to this page? (Need more space? Add to “Notes” section at end of form or contact us to discuss.)

<table>
<thead>
<tr>
<th>URL:</th>
<th>Where on the Page?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
NEW YORK STATE LIBRARY: Web Publication Checklist

4. How should this page be listed in the Site Index? (Note: A page can be listed more than once. The Library catalog, for example, is listed as Catalog, Online Catalog, and Excelsior.)

5. Are there any graphics on this page? ___ Yes ___ No
   
   If yes, where can the graphics be found? (A list of some commonly used graphics can be found at http://atworkux.nysed.gov/library/webguide/images.htm.)
   
   ___ Sent with the HTML file.
   ___ Already on the server at URL: ____________________________.
   ___ Other: ____________________________
   (Suggestions: T drive, R drive, K drive)

   If this is a new graphic, please provide alternative text (a brief description of the graphic that will be read by those who cannot, or choose not to, view graphics).

6. When should this page "go public"? ____________________________

   Note: If there are problems with the page, if testing is required (e.g., forms), or if the new page will necessitate changes to other, existing pages, you should send the page to the Web Administrators at least three (working) days before you want it to go up.

7. Is this page: ___ Permanent
   ___ Temporary—Remove page on the following date:

Page Owner Information

8. Who is the page owner (responsible for content)?

______________________________
Who is responsible for the HTML?
__________________________

Approval: Complete 9.a. or 9.b.

9. a. Approval Needed for Previously Unpublished Material:

Approved by Principal Librarian, Coordinator for Statewide Library Services (DLD), or his or her designee:

Yes_____;
Approved By:

____ Carol Desch
____ Liza Duncan
____ Mary Redmond
____ Loretta Ebert
____ Other: ________

9. b. Approval Needed for Updated Material:

Approved by Associate Librarian or his or her designee.
Approved By: __________________________

10. Submitted By: ________________________

Notes: __________________________________________________________________________

When you send any new pages or updated pages to the Web Administrators, please inform your area’s Web Team member(s).