

Digital Finding Aids Workflow

This document summarizes the workflows for submitting a marked up finding aid to OASIS.

Goals

- Provide online access to the finding aid
- Preserve access to the finding aid by assigning a persistent ID (URN)
- Provide discovery of the digital finding aid through Harvard's library OPAC, HOLLIS

Prerequisites

You must be an approved participant in OASIS and an authorized user of OASIS batch and/or interactive loaders.

Submitting a Finding Aid

Note: in most cases, it is the responsibility of a repository's [OASIS liaison](#) [update link] to submit a finding aid to OASIS.

1. **Upload the finding aid to OASIS.** Finding aids can be submitted to a [Batch Loader](#) [update link] by secure FTP, or to a web-based [Interactive Loader](#) [update link]. Consult the [Uploading Finding Aids](#) page for information on advantages of each. Most OASIS contributors use the interactive loader.
2. **Acquire the finding aid URN.** If batch loader is used, the URN will be included in the load report that is emailed to the OASIS liaison. If interactive loader is used, copy the URN that displays on screen at end of the process.
3. **Link to finding aid from HOLLIS.** See the [Linking to Finding Aids from Catalogs and Web Sites](#) (LinkingFindingAidsCatalogs_Final.doc) for instructions on creating a link within the HOLLIS record to the OASIS finding aid.

Updating a Finding Aid

To update a finding aid already in OASIS:

1. Use the [Interactive Loader](#) [update link] to download the finding aid from OASIS. Then update the finding aid as needed.
2. Re-upload the finding aid using either the Interactive Loader or the Batch Loader.

Removing a Finding Aid

If you need a finding aid removed from OASIS, send a message to [OASIS support](#) in OIS.

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<http://hul.harvard.edu/ois/systems/mat/digital-finding-aids-workflow.pdf>