Summerlee Project Report, Year 1
TARO New Member Initiative

Project Summary to Date

In general, the first year of the project has started off slowly, but it is moving forward. We're developing procedures, and we believe as the project proceeds, finding aids will be uploaded to TARO at a greater rate and begin to meet project goals. This report will outline the development of the project workflow and key areas that need improvement; funds spent in the first year and spending projections; and project goals for next year.

As of October 31, 2019, there have been:

- A total of 9 Participating Repositories (PRs) have joined TARO in 2018-2019 and will participate in the Summerlee project. All have signed the project agreement.
    - Harris County Archives (2018)
    - Menil Collection Archives (2018)
    - Fort Worth Jewish Archives (2018)
    - Panhandle-Plains Historical Museum Research Center (2018)
    - Catholic Archives of Texas (2018)
    - Lamar University (2018)
    - Harlingen Public Library (2019)
    - Dallas Historical Society (2019)
    - The Museum of Fine Arts, Houston (2019)
- A total of 94 WORD files have been submitted for encoding or review by all 9 PRs in the project to date.
- 32 finding aids have been encoded by the vendor and uploaded to TARO for 3 PRs, Lamar University, Harris County Archives, and Catholic Archives of Texas.
- All initial PRs who joined in 2018, have submitted WORD files for encoding.
- 3 additional PRs joined the project in 2019: Museum of Fine Arts Houston, Dallas Historical Society, and Harlingen Public Library. Museum of Fine Arts Houston and Dallas Historical Society have submitted WORD files for encoding.
- Zero funds have been spent on the project so far. According to the Delivery #1 Report (See attachment A, Delivery #1 (29 files) 07252019.xslx) from the vendor, 29 files were encoded equaling 231,489 characters. The rate that the vendor has provided to the University of Texas Libraries is $0.44 per character, which calculates to a current balance of $101.86. We have asked the vendor to clarify when they will invoice the project.

Project Workflow Development

The project workflow is a work in progress and has gone through some modifications to improve efficiency since the beginning of the 2019 calendar year, especially regarding the Quality Assurance (QA) procedures. (See attachment B, Summerlee Workflow)

In November 2018, we sent a test batch of 3 WORD files to the vendor. The encoded XML files that we received had some issues that the Steering Committee felt needed to be reviewed by the Standards Subcommittee. Standards revised the WORD and XML templates as well as created a crosswalk that mapped fields between the two templates. The revised templates and crosswalk were shared with the vendor when the first batch of 29 files were delivered for encoding in July 2019.

The project workflow consists of a network of six distinct relationships to be developed and refined. Some have more challenges than others:

1. **QA and PR relationship**. The QA Chair works directly with PR contacts to ensure WORD file finding aids adhere to the supplied TARO WORD Template. QA Chair works with PR contacts to address any reviewer comments before finding aids are sent to vendor. This is a one-on-one relationship with the PR contact and any additional staff (or volunteers). Each PR has their own level of experience and requires significant time and attention to tailor communications to each through phone calls, emails, and in-person meetings. It has been helpful to provide an example of one of their finding aids with all the review comments and going through it with them. When PRs submit finding aids regularly in consistent volumes, QA communications with PR can eventually be delegated to QA Teams for more direct communications between QA reviewers and PR representatives, building a rapport. Also, having meetings with all PRs or at least in groups might be beneficial.
2. **QA and Vendor relationship**. Originally, the Steering Committee Chair had the responsibility to communicate directly with the vendor. This was the case during 2018. Since the out-going chair becomes the QA Chair, it was natural for the communication to remain consistent, especially for the beginning of the project. Having direct communication between QA and vendor seems to be an efficient dynamic, and it is recommended that it remains part of the project workflow. QA Chair will deliver WORD files to vendor and notify the Steering Committee of delivery as well as receipt of encoded files from vendor.
3. **QA Subcommittee working relationship**. The QA Subcommittee consists of nine members, including the chair. One member has rolled off while a new member has been added. Originally the QA Chair assigned files to individuals who communicated directly to the chair after each of the two review passes. Early in 2019, members were paired off into four teams, allowing the chair to assign files to the team, who will work among themselves to complete both review passes. Teams have improved efficiency and simplified file tracking since a team will review the same finding aids throughout the workflow. Converting submitted WORD files to Google documents and performing reviews within the same document has been another improvement. QA teams can add comments to the file for their teammate as well as QA Chair to review. All comments are saved to provide documentation for the review process of each file. QA Subcommittee members communicate through Google Doc comments, email, and conference calls every two to four months. As more files are submitted and the full workflow is in action, meetings will be more regular (likely, monthly).

4. **QA, Standards Subcommittee and Steering Committee relationship**. This is a pretty smooth relationship. It helps to have members overlapping on the Steering Committee and subcommittees, which will probably remain the case throughout the project. An excellent example is the template revision process. After the test batch of 3 WORD files was encoded by the vendor, QA reported to the Steering Committee about major issues that needed addressing. The Steering Committee charged the Standards Subcommittee to revise the WORD and XML templates and create a crosswalk to help the vendor map the required fields between the two documents.
5. **Steering Committee and PR relationship**. The Steering Committee Chair (SC Chair) recruits new Participating Repositories to the project, addressing questions about TARO membership requirements; completing the project agreement; and providing preliminary training with TARO WORD template. The SC Chair experiences similar issues as the QA Chair above. Working with PRs is a one-on-one relationship that takes time and adjustments. The SC Chair needs to tailor initial training to the level of experience. Initial training requires orienting PR contacts to the provided TARO WORD template and merging the information required in the template and the PR's collection management system (or workflow).
6. **Steering Committee, TARO Programmers (UT Libraries), and PR relationship**. This is a pretty smooth relationship as well. The Steering Committee Chair gathers participating repository description, logo, contact information, and website links and shares the information with the TARO Programmers in UT Libraries to create new accounts in the TARO system. UT Libraries programming team is very responsive. The department has a clear process and can provide accurate times for completion. New accounts are created long before finding aids are ready to be uploaded to TARO.

The key areas for improvements and where the most backlogs occur:

- **PR WORD file submissions** take staff time at the Participating Repository (PR) which is always in demand. Existing finding aids for each repository are in various stages of completion. Some collections have highly detailed inventories while others have been unprocessed with the barest description. For this project, PRs are required to convert their existing finding aids to conform to the provided TARO WORD Template. At least one PR has utilized a mail merge template that uses a spreadsheet to gather required collection information and inserts it into a mail merge configured TARO WORD Template. The Steering Committee Chair and QA Chair work with each PR to facilitate the submission process as much as possible for them.
- **QA Chair preparation and assignment of WORD files for review**. WORD files are submitted by PRs by uploading the files into their repository folder on the project's Google Drive. Some repositories email files to the Steering Committee Chair or QA Chair. The QA Chair performs a quick review of the files, checking that they fit the TARO WORD Template and all required fields are completed. The files are copied to the QA-WORD folder and renamed with a repository abbreviation and TARO identification number (for example, pr-00001). File information is entered into the tracking spreadsheet, and batches of files are then assigned to each QA Team of two QA

Members, usually 5-8 files per team in a batch. The main issue is the QA Chair is one person with a finite amount of time, and this will always cause a backlog for any project. As the workflow is developed and submitted finding aids become more consistent, this stage will become more efficient as well. With more finding aids submitted consistently from all PRs, it will be possible to delegate more responsibilities to QA Teams, assigning PRs to work with directly.

- **QA WORD file review**. On the flip side of the above, WORD file review involves 8 people with varying amounts of time. The process is generally fast but nebulous. Providing deadlines and QA Chair reminders can help with speeding up the review stage. Some review comments require PR response which adds more time. QA teams are instructed to make edits where they can, and QA Chair will send an email to PR about common issues to correct for their next submission.
- **QA Chair assignment of XML files for review**. The preliminary review process is similar to WORD Files. Since comments cannot be made directly in the XML documents, an additional text file is created to document changes made during the review process. QA Teams are assigned the same finding aids they reviewed in the WORD QA. This has simplified the file tracking and assignments.
- **QA XML file review**. We are currently working on the QA review for the first batch of XML files, but the initial impression is that the vendor files are consistent and should be a faster review process than WORD file review.

Funds Spent in First Year of Project Activities

Considering the current project balance, stated in the above summary (231,489 characters x $0.44 = $101.86) and the current output of the project, it might take over the 5 years to spend the total $10,000 provided for the project. The project was proposed to last 5 years.

Project Goals for Next Year

- Have all PRs submitting WORD file finding aids regularly and meet yearly estimate of 200 finding aids by the end of 2020.
- Refine QA workflow and increase efficiency to meet yearly estimate of 200 finding aids encoded and uploaded to TARO by the end of 2020.
- Incorporate new PRs to project seamlessly, adding five more PRs for a total of 15 by the end of 2020.

Project Events and Dates

Kickoff and follow-up with QA Volunteers.	8/14/2018
Requested Collection Lists from Participating Repositories (PRs)	8/14/2018
QA Subcommittee Formed	9/10/2018
Sent Project Agreements to PRs	9/12/2018

First Meeting of QA Subcommittee	9/17/2018
Test Batch of 3 WORD files sent to vendor	11/14/2018
Test Batch of 3 XML files delivered by vendor	12/2/2018
3 XML files uploaded to TARO and available online	6/18/2019
Batch of 29 files from 3 different PRs sent to vendor	By 6/30/2019
QA began for 24 WORD files from 2 different PRs	6/21/2019
29 WORD Files delivered to vendor for encoding	7/16/2019
29 XML Files receive from vendor.	7/25/2019
QA began for 29 XML files from 3 different PRs.	9/24/2019
29 XML files Uploaded to TARO	10/29/2019
QA began on ~30 WORD Files from 4 PRs.	*11/1/2019*
24 WORD Files delivered to vendor	*11/4/2019*

Attachment A

Batch #	Filename	No. of Characters	No. of Elements	Total Characters
1	ca-00019.xml	10070	692	10762
1	ca-00031.xml	15270	1876	17146
1	ca-00057.xml	13134	2359	15493
1	ca-00061.XML	3298	122	3420
1	hc-00001.xml	7232	164	7396
1	hc-00004.xml	6248	207	6455
1	hc-00006.XML	5167	146	5313
1	hc-00037.xml	18567	272	18839
1	hc-00038.xml	6238	206	6444
1	hc-00040.XML	8406	183	8589
1	hc-00058.xml	6663	177	6840
1	hc-00059.xml	5143	207	5350
1	hc-00060.XML	8379	240	8619
1	hc-00061.xml	6378	176	6554
1	hc-00062.xml	4583	146	4729
1	hc-00063.xml	3530	146	3676
1	hc-00064.xml	6054	182	6236
1	hc-00076.xml	6141	237	6378
1	hc-00098.xml	8974	202	9176
1	hc-00111.xml	5402	163	5565
1	hc-00112.xml	6485	179	6664
1	hc-00115.xml	9046	227	9273
1	hc-00122.xml	4915	237	5152
1	hc-00125.xml	4358	197	4555
1	hc-00137.xml	18329	340	18669
1	hc-00145.xml	5454	252	5706
1	lu-00008.xml	6302	1260	7562
1	lu-00009.xml	4709	233	4942
1	lu-00010.xml	5751	235	5986

Calculations by TARO	
Total Documents	29
Total Characters	231489
Rate per 1000 characters	$0.44
Cost Estimate	**$101.86**

Attachment B

Workflow and Structure for Summerlee EAD Project

Structure

Project TARO Contact: We've created a gmail account to manage the project, talk2taro@gmail.com.

Roles and Contact Info

- Steering Committee (SC)
  - 2018 Chair, Sandra Yates, syates@library.tmc.edu, 2018-2019
  - **2019 Chair, Carla Alvarez, C.Alvarez@austin.utexas.edu, 2018-2020**
  - 2020 Chair, Rebecca Romanchuk, rromnchk@tsl.texas.gov, 2019-2021
  - 2021 Chair, TBE, 2020-2021
  - 2022 Chair, TBE, 2021-2022

    - 2022 Chair-elect, TBE, 2022
    - UT Library representative, Aaron Choate, achoate@austin.utexas.edu, (billing), 2018-2022
    - Programmer (account creation, upload as part of usual duties specified in Governance Plan), lib-taro@austin.utexas.edu, 2018-2022
- Funding Subcommittee chair (FS)
- Standards Subcommittee (SS)
- Quality Assurance Subcommittee (QA)
    - QA Chair (QAC) is the current TARO Steering Committee Immediate Past-Chair
        - 2018 Chair, Amanda Focke, afocke@rice.edu
        - **2019 Chair, Sandra Yates, syates@library.tmc.edu**
        - 2020 Chair, Carla Alvarez, C.Alvarez@austin.utexas.edu
        - 2021 Chair, Rebecca Romanchuk, rromnchk@tsl.texas.gov
        - 2022 Chair, TBE (2020 Steering Committee Chair-Elect)
    - Members (at least 10) (QAM)
        - Volunteers from TARO community
        - Sandra Yates, Chair SC
        - Carla Alvarez, Chair-elect SC
- Participating Repositories (PR), See complete list.
    - Harris County Archives, Sarah Jackson, SJackson@cco.hctx.net
    - Menil Collection, Lilly Carrel, lcarrel@menil.org
    - Fort Worth Jewish Archive, Hollace Weiner, hollaceava@gmail.com
    - Panhandle-Plains Historical Museum Research Center, Warren Stricker, WStricker@pphm.wtamu.edu
    - Catholic Archives of Texas, Selena Aleman, Selena@txcatholic.org
    - Lamar University, Penny Clark, pclark@lamar.edu
- Vendor, Digital Divide Data (DDD), Project ID# 101166, **2019 PO# 2019A02835**
    - Sales Representative, Jacquie Tannenbaum <jacquie.tannenbaum@digitaldividedata.com>
    - Sales Liaison to Operations, May Anne DELA CRUZ <mayanne.delacruz@digitaldividedata.com>
    - **Project Manager, Liaison to Manila Team, Cris Lindsay <cris.lindsay@digitaldividedata.com> [Primary Point of Contact]**
    - Erlita Reyes <erlita.reyes@digitaldividedata.com>,
    - virgil.sangalang@digitaldividedata.com,
    - Becky Santora <becky.santora@digitaldividedata.com>

Responsibilities

- Steering Committee
    - Create TARO accounts for participating repositories
    - Add repository account to Project Tracking spreadsheet
    - Provide templates to PR

    - Communicate to PR about project progress and XML delivery
    - Communicate to Vendor
    - Update Project Tracking spreadsheet for creation, delivery stages
    - Recruit and maintain participating repository list for project, adding interested PRs and updating submitted information.
- Funding
    - Track Costs
    - Update Project Tracking spreadsheet
    - Submit Project Reports to Summerlee Foundation
- Standards
    - Create and modify Templates
- QA
    - Assign TARO# to supplied collection list for each PR
    - Receive uploaded Word files
    - Link to file in Project Tracking spreadsheet
    - Assign to QA member for pass 1
    - Assign to QA member for pass 2
    - Communicate with PR about QA
    - Upload approved Word files to Dropbox “Word” Directory (delivery to Vendor)
    - Notify SC to communicate files are ready for encoding to vendor
    - After encoding, upload XML files to Google Drive Folder (/XML)
    - Assign to QA pass 1
    - Assign to QA pass 2
    - Upload XML to TARO
    - Notify SC to communicate XML files are ready for delivery to PR
    - Update Project Tracking spreadsheet throughout QA process
- Participating Repositories
    - Provide information and description about organization and collections (see Join TARO)
    - Provide list of all collection in repository (so QA can assign TARO# to all)
    - Prepare Word files according to templates
    - Upload finding aid Word files (or other approved format) to Google Drive Folder, adding TAROrid-TARO#_ [original-filename] as Prefix (EX: tmc-00001_FA002-Stevens.docx)
    - Provide additional information upon request in a timely manner
    - Communicate with QA about finding aids
    - Communicate to SC about project progress
- Vendor
    - Receive Word files through Dropbox
    - Upload completed XML to Dropbox
    - Communicate with SC Chair and Immediate Past Chair about project progress and file completion
    - Deliver files through Dropbox

What We Need to Track

- Participating Repositories (Project Tracking spreadsheet)
    - TARO Accounts
    - Finding Aids, TARO ### for each account, tracking to completion
    - File size, number of pages (to gauge costs, turn around estimates from vendor)
- List of Participating Repositories as they express desire to participate
- Track Expenses and Balance
- QA Subcommittee Member list

Templates

The Standards Subcommittee will create the following templates and distribute to QA Subcommittee before submissions begin. Standards will be responsible for making any modifications to the templates as needed:

- Template-min.docx (a minimal collection-level template)
- Template-full.docx (a full finding template with detail description)
- Template-min.xml (a minimal collection-level template)
- Template-full.xml (TARO template)

https://drive.google.com/drive/folders/1oeuIfKLDH6ytOBOA-S8NLzhdETiE1TqV?usp=sharing

Workflow

The workflow for the project consists of four stages:

1. Account Preparation
2. Word File Processing
3. XML File Processing
4. XML Delivery

Account Preparation

PR: Submits repository logo, description, contact info, URLs, and MARC organization code
SC: Create TARO Account
PR: submits complete collection list
QA: Assigns TARO# according to collection list
SC: Creates Google Drive directory for each repository

Word File Processing

PR: Prepares Word files according to provided templates
PR: Uploads Word files to designated directory in Google Drive (match TARO account)
PR: Notifies SC/QA that files have been uploaded (or QA checks once a week)
QAC: Provides confirmation that files received to PR
QAC: Updates Project Tracking linking to file
QAC: Renames word files according to specified naming convention
QAC: Assigns file(s) to QA members for Pass 1
QAM: Reviews Word file to Template
QAM: Updates Project Tracking, Pass 1 Complete, and notifies QAC
QAC: Assigns file(s) to QA members for Pass 2
QAM: Reviews Word file to Template
QAM: Updates Project Tracking, Pass 2 Complete, and notifies QAC
QAC: Communicates with PR if there are any significant changes
QAC: Uploads Word file(s) to Dropbox /Word directory and notifies SC that files are ready for vendor.
SC: Notifies vendor that files are ready for encoding

XML Processing

Vendor uploads XML files to Dropbox /XML directory and notifies SC that XML files are completed
SC: Uploads files to Google Drive /XML-from-vendor
SC: Notifies QAC that new files have been uploaded
QAC: Updates Project Tracking linking to file
QAC: Assigns files(s) to QA members for Pass 1
QAM: Reviews XML file to Template
QAM: Updates Project Tracking, Pass 1 Complete, and notifies QAC
QAC: Assigns file(s) to QA members for Pass 2
QAM: Reviews XML file to Template
QAM: Updates Project Tracking, Pass 2 Complete, and notifies QAC
QAC: Communicates with SC if there are any significant changes
SC: Communicates with Vendor about changes
QAC: Uploads completed XML to TARO, removing TARO account prefix and original filename
QAC: Updates Project Tracking

XML Delivery

QAC: Notifies SC that files have been uploaded to TARO
SC: Moves XML files from /XML directory to /PRaccount/XML directory
SC: Communicates with PR and provides a link to download files

SC: Updates Project Tracking, Complete.
PR: Communicates to SC about any issues with files or TARO finding aids

Directory Structure

The following illustrates the general directory structure of the project in both Google Drive and Dropbox.

Google Drive (for each PR)

- RepositoryAccount (TARO account id for each PR)
    - repository delivery of finding aid Word files directly into directory
    - PR-Collection-list (spreadsheet that lists collection title and TARO ID)
    - /XML (final delivery of XML files)
- XML (all finding aids encoded by vendor)

Dropbox (https://www.dropbox.com/home - same login as email)

- WORD (incoming finding aid Word files)
- XML (outgoing encoded finding aid XML files)

Project tracking spreadsheet

Google sheet LINK

Notes to QA Finding Aid Committee

https://docs.google.com/document/d/1afual7FBxC-kLlhWBVQUjTtfYnZLB-x-XqQNLy6zg98/edit?usp=sharing

Summerlee Word/XML Crosswalk

https://docs.google.com/spreadsheets/d/1-pO3cFHy0hXb6jfrOU1yyY4eKUTGyzyOnXYVdBfelw0/edit?usp=sharing

Workflow Modifications 2019

- Repository-Files folder:
    - I've moved all the QA files into a QA Word or QA XML folder to keep the QA process in one place and provide an uncluttered folder for PRs to submit their finding aids. We will be doing all of our work in this folder.

    - I'm placing the repository's collection list with TAROIDs in each repository folder within Repository-Files, so the PR and the QA member can consult the list as needed.

- Standardizing QA file naming: As the file progresses through the workflow, reviewers will add a suffix to the file name to indicate pass 1, pass 1 complete, pass 2, pass 2 complete, and ready for vendor or TARO upload.
    - The file name for a completed Word file will look like this: pr-00001_w1c_w2c_ready (w = word, c = complete)
    - The file name for a completed XML file will look like this: pr-00001_x1c_x2c_ready (x = XML, c = complete)
- QA Teams and contacting Participating Repositories: As I'm setting up assignments, I realized that we shouldn't have four different teams contacting one repository.
    - Until further notice, teams will provide a list of issues to the QA Chair after the pass 2 is completed, and I'll contact the PR.
    - If there are minor issues that don't need PR feedback or approval, go ahead and make the change or recommend the change before delivering to the vendor.

QA File Naming Convention

https://docs.google.com/document/d/1LKFutASJXzBeXSdDkHAVwTka2T37crWEyV5eL6OISLA/edit?usp=sharing

pr = Participating Repository abbreviation
w = word
x = XML
c = complete

Word

pr-00001	Ready for Review
pr-00001_w1	Word Pass 1
pr-00001_w1c	Word Pass 1 completed
pr-00001_w1c_w2	Word Pass 2
pr-00001_w1c_w2c	Word Pass 2 completed
pr-00001_w1c_w2c_ready.docx	Word file ready for vendor

XML

pr-00001.xml	Ready for Review
pr-00001_x1.xml	XML Pass 1
pr-00001_x1c.xml	XML Pass 1 completed
pr-00001_x1c_x2.xml	XML Pass 2
pr-00001_x1c_x2c.xml	XML Pass 2 completed
pr-00001_x1c_x2c_ready.xml	XML file ready for TARO

Workflow Modification Procedure

https://docs.google.com/document/d/1lO5VPQ9V7Yt4zfREkrgIaSrkS5Wo9VvlQWr6yX-Cj1I/edit?usp=sharing

Word QA Workflow

QA Chair will assign WORD files to each QA Team. Team member will determine who will perform the first and second pass. Notify the QA Chair when the final pass is completed and the finished WORD file is uploaded to the WORD-QA folder. Files can be reviewed within the Google Doc.

WORD Pass 1

1. Rename file pr-00000-w1
2. Review files making changes in document. You can note changes in comments. Suggest changes in comments. Discuss issues in comments.
3. When Pass 1 is complete, rename file pr-00000-w1c.
4. Update Tracking Sheet
5. Notify team member that file is ready for Pass 2.

WORD Pass 2

6. Rename file pr-00000-w1c-w2
7. Review file, making changes in document. You can note changes in comments. Suggest changes in comments. Discuss issues in comments.
8. When Pass 2 is complete, rename file pr-00000-w1c-w2c.
9. Update Tracking Sheet.
10. Notify QA Chair that QA for WORD file is complete and ready for final review.

Final Review and Dropbox Upload (QA Chair)

11. Review file, making changes in document. Resolve all comments. Contact PR to clarify any unresolved issues, linking to specific document comments.
12. When Final Review is complete, rename file pr-00000-w1c-w2c-ready.
13. Download file (or all "-ready" files as a batch)
14. Upload files to Dropbox.
15. Notify SC Chair to deliver dropbox link to Vendor.

XML Workflow

QA Chair will assign XML files to each QA Team. Team members will determine who will perform the first and second pass. Notify the QA Chair when the final pass is completed and the finished XML file is uploaded to the XML-QA folder.

XML Pass 1

1. Download XML file
2. Rename pr-00000-x1.xml
3. Review files and validate/correct XML as you go. (See common XML issues)
    a. Compile notes of actions and suggestions in a TXT file, try to keep in order top to bottom of file. You may want to indicate line# but not necessary. (lu-00006_notes.txt example)
    b. Save TXT file as pr-00000_notes.txt
    c. See examples in XML-QA folder
4. When Pass 1 is complete, rename file pr-00000-x1c.xml
5. Upload XML file and TXT file to XML-QA folder
6. Remove original XML file
7. Notify Team Member

XML Pass 2

8. Download XML file, pr-00000-x1c.xml
9. Rename pr-00000-x1c-x2.xml
10. Review files and validate/correct XML as you go. (See common XML issues below)
    a. Add notes of actions and suggestions in a TXT file, try to keep in order (top to bottom) of file. You may want to indicate line# but not necessary.
    b. Save TXT files as pr-00000_notes.txt
    c. See examples in XML-QA folder
11. When Pass 1 is complete, rename file pr-00000-x1c-x2c.xml
12. Upload XML file and TXT file to XML-QA folder (or email to Team)
    a. Remove other related XML files
13. Link to pr-00000_notes.txt file on Tracking Sheet
14. Notify QA Chair that QA for XML file is complete and ready for final review.

Final Review and Upload (QA Chair)

15. Download XML file, pr-00000-x1c-x2c.xml

16. Review file and notes, making sure XML is validated and all notes have been addressed.
    a. Contact PR if any issues involve their input
17. Rename XML file pr-00000-x1c-x2c-ready.xml
18. Upload file to XML-QA folder to await upload to TARO
19. Download XML file to a designated folder (PR specific since many filenames will be the same)
20. Rename XML file 00000.xml and upload to TARO.
21. Notify PR that finding aids have been uploaded to TARO, provide link to their repository page. Finding aids will be posted to TARO the following Tuesday.
22. Indicate in Tracking Sheet that the file is completed.

Common Issues Found in the Test Batch (See notes)

- Mainagency
- <ead> use global LOC link
- <sup>
- Extent
- Repository xlink