Texas SAR Archive Instructions

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Background

The Texas SAR Archives Committee is and has been a subset of the Texas SAR History Committee for years. As such in 2005 the original agreement was formulated for the University of North Texas, UNT, to take possession and archive selected documents, photos, and memorabilia as the TXSSAR Archives Special Collection. Those documents, etc. would consist of Texas SAR state artifacts and chapter artifacts. As they had access to the Portal of Texas, selected state documents were digitized and made freely available online to the public without login. Public access was provided via appointment to the Willis Library.

In the spring of 2023, the UNT Special Collections Director informed our Texas SAR Historian that they no longer wished to accept future donations to this collection.   She stated budget cuts reasons that restricted staff levels. But it is our belief that increasing shelf space was part of their reasoning.   They had approximately 2800 documents and photos online, and 105 library boxes collected.

With study by the Texas SAR Historian and Archives Committee including multiple professional compatriot archivists, and with observation of the available online server space, backup, restore, and search resources, the following is recommended.

Recommendations

1. Implementation strategies to support the Texas SAR Archives collection should be developed and that it be digital and online. As modern online search capabilities already exist, the subsequent research investigations are already supported.
2. A single archive repository server is desired. Segregated/separate repositories by state, office, chapter, or otherwise shall be eliminated. The texassar.org server has unlimited space available.
3. To safeguard against future archive conflicts and interruptions, the Texas SAR should use its own compatriot and other volunteer resources to perform the archive duties and assignments necessary to support the archive longevity.
4. Archive artifacts are identified in two primary categories of public-archives and private-archives and two main categories each of Texas SAR and chapter archive artifacts. Several sub-categories will be identified and used as keywords for subsequent research.
5. Public vs private document considerations are a concern. Private artifacts shall be any containing personal/sensitive information. Personal/sensitive information includes data of date of birth, social security number, personal email, personal phone, and personal street address. Also, personal information includes the full names and photos of Junior members, unless a parental release form of obtained.
6. Archiving on-line documents with a Social Security number is not recommended in either public-archives or private-archives. Either redact them or keep those documents separately.
7. If personal/sensitive information is found, consider redacting that data to allow the artifact as a public-archive.
8. Texas SAR archive artifacts shall be digital. Those that are not electronic shall be scanned to lossless digital formats. Memorabilia and video artifacts shall not be archived. Chapters should hold onto their own memorabilia and put their videos in chapter or state YouTube channels.
9. If a document contains personal/sensitive information, then it is deemed private-archives.
10. Chapter documents worthy of preservation may be either added to chapter websites or archived in chapter public-archives or chapter private-archives web spaces. Chapters with websites should strive to add public documents to their chapter website.
11. Texas SAR documents worthy of preservation are similar. They should be added to either a Texas SAR webpage or added to Texas SAR public-archives or Texas SAR private-archives web spaces. Web Admins of Chapters with websites shall either place archive artifacts on their own public webpages or in public-archives/private-archives folders as appropriate.
12. Selected Archives committee members and/or team shall place archive artifacts, in TexasSAR or chapter specific public-archives/private-archives folders as appropriate.
13. File Naming standards shall be developed and followed by the archivists.
14. Strive for high quality photos; set your cameras to their better or best quality density and resolutions.
15. Once archived digitally and online, any paper or image can be either kept at the chapter or destroyed.

Implementation

- State and Chapter Historians have a common goal to preserve our Texas SAR history. Be sure to provide them with the necessary documents and photos of our Texas SAR activities. Minutes, motions, awards, certificates, newsletters, yearbooks, various lists, and photos with captions are examples of meaningful archive artifacts.
- Not everything has an archive value. Evaluate each potential archive artifact. Does it have future value? Will the information it contains have significance and give a future researcher meaningful information? Photos without captions have minimal value.
- Proprietary files, those not developed by Texas SAR members for the use of Texas SAR members, are not to be archived by the Texas SAR.
- As credentials are necessary to process the Texas SAR Archives, please do not use public PCs. Accidental saving passwords on public PCs could jeopardize the archives. Use your personal PC.
- Except for wide spreadsheets and those with multiple tabs, all Microsoft and open-source formatted files are readily convertible to pdf. Archive files, including photos, **should be converted to pdf format**.
- Follow the suggested naming standards with a date and meaningful description. File in the suggested sub-folders as keywords for future search criteria.
- Store jpg and all images in a "lossless" manner into a pdf file to avoid future decoding and recoding issues. These conversions are provided by several software programs. Many have batch conversion features. One of which is the free easy to use "IrfanView" software program (https://www.irfanview.com/). The Archive committee team can get you up and running.
- Photos without accompanying information are meaningless to future researchers. Therefore, adhere to the naming standards. And when a longer caption is needed, then embed it as text within the pdf.
- Do not archive videos. If you wish to keep videos, put them in chapter or state YouTube channels.
- Keep up with archive backlogs, do not let it accumulate such that one is overwhelmed.

Assignments

- The Texas SAR Historian, Web Admins and Archives Committee members shall develop the steps necessary to conduct their own archives standards, procedures and security accesses. This includes the development of standards and procedures, orientation and training materials.
- For all archives, the Texas SAR Web Admin shall develop secured FTP accesses for the supporting personnel to maintain their corresponding public vs private archives. He shall also monitor as appropriate the overall server healthiness and advise of any backup concerns.
- For Texas SAR state level archives, the Texas SAR Historian and Archives Committee shall gather a team and execute the duties and assignments to process and maintain documents, photos and other archive artifacts identified as state archives. They should also execute equivalent duties and assignments to process and maintain documents, photos and other archive artifacts presented to them from chapters without websites.
- For Texas SAR Chapter archives, the Texas SAR Chapter Web Admins shall execute the duties and assignments necessary to process and maintain their own archive documents, photos, and other artifacts. As they already process the capability to place and link artifacts to their chapter web pages, the additional effort should be negligible.

File Folder Standards

Public Archives
For chapters with and without a website and for Texas SAR items:
Texassar.org   [public browser accessible, login NOT required]
        /public-archives
                /ChapterName [i.e., Arlington, MajorWhite, PermianBasin, Pineywoods, etc.]
        or…
                                                                                /TexasSAR

Private Archives
For all chapters with and without a website and for Texas SAR items:
Texassar.org/!!TXS!!SAR!!   [public browser accessible, login required]
        /private-archives
                /ChapterName [i.e., Arlington, MajorWhite, PermianBasin, Pineywoods, etc.]
        or…
                /TexasSAR

Suggested Local Chapter PC Setup
(clean your folders after archival)
.../My Websites   Some sub-directory on your PC or MAC
        /public-archives
                /ChapterName [i.e., Arlington, MajorWhite, PermianBasin, Pineywoods, etc.]
        or…
        /private-archives
                /ChapterName [i.e., Arlington, MajorWhite, PermianBasin, Pineywoods, etc.]

Common Public and Private Archives sub-folders
For chapters with websites, place your PDF files wherever to fit your webpage needs. But for archives not on a webpage, then please use the Public and Private Archives standards above and group archive items in common sub-folders. For example, photos of an event should be either included in the same pdf document as the agenda and other documents and/or in the same sub-folder as the agenda. And for all chapters with and without websites, place the files within the corresponding sub-folder.
                /agendas
                /charter
                /colorguard
                /committees
                /constitution-bylaws
                /histories
                /minutes
                /newsletters
                /officers
                /reports
                /rosters
                /yearbooks
                /...

File Naming Standards

To aid subsequent research, the descriptions should be meaningful with separate words. Long meaningful descriptions are encouraged with names, places and events. Jamming all together or camel case should not be used. Example: instead of "ChapterCharter", use "Chapter Charter" or "Chapter-Charter".

Filename restricted symbols; DO NOT USE these symbols within a filename; #, %, ^, &, *, |, \, :, <, >. It is suggested to limit the use of symbols to brackets, commas, dashes, minus, plus, parentheses, spaces, underscores and numbers,

PDF file types are required. Save all Microsoft formats (.doc, .docx, .ppt, .pptx, .xls, .xlsx .pub, etc.) and images to pdf. Wide spreadsheets or those with multiple tabs are the exception. By nature, archived files should not be revised. Version number revised files.

Each archived item/file shall be named with a beginning date in YYYYMMDD format and a meaningful description and placed within the standard folder above.

/date meaningful description.pdf

Examples:
Texassar.org/Pineywoods/public-archives/officers/20240401 Past Presidents List.pdf
Texassar.org/Arlington/public-archives/charter/19930108 Chapter Charter.pdf
Texassar.org/!!TXS!!SAR!!/private-archives/any chapter/doc containing private info.pdf

Archivist Check List

__ is the potential archive file worthy?

__ has the file been converted to pdf?

__ does the filename begin with the correct date format; YYYYMMDD?

__ does the filename have a meaningful description with words separated, and with care use of symbols?

__ does the file contain private information? If so, either redact or earmark as private-archives.

__ has a relevant archive sub-folder been identified?

FTP Access

Texas SAR Committee Archivists and Chapter Archivists are free to use the FTP software of their choice. For Texas SAR state items, FTP credentials will be provided to the Texas SAR Archives committee. For Texas SAR chapter items, after Chapter President approval, FTP credentials will be provided to a Chapter Archivist, which is normally the Chapter Web Admin. For those chapters without Web Admins, the Texas SAR Archives committee will be the Chapter Archivist.

Several FTP upload software programs are available. One of which is the free easy to use "FileZilla Client" software program (https://filezilla-project.org/). It is available for Windows, macOS, and Linux platforms. Basic PC or macOS knowledge is needed, basic FTP processing is a plus.

Each approved archivist should receive two access credentials, one for public-archives, another for private-archives. Upload appropriately to public-archives and private-archives. Good upload habits include reviewing and verification that new files are in the correct folder location.

Contact the Texas SAR Archives Committee at historian@texasSAR.org for more information.

Researchers

Review of the public artifacts is available to the public-archives via https://texasSAR.org/public-archives.

Research of the public available artifacts is available via the magnifying icon at https://texasSAR.org. Enter a simple search and press enter to view and select more search options and categories. For more information about searching check the Search Tips link.

Research of the private available artifacts is available via the magnifying icon at https://texasSAR.org/!!TXS!!SAR!!; login is required. Again, enter a simple search and press enter to view and select more search options and categories. For more information about searching check the Search Tips link. If needed, ask your Chapter Officers for the credentials to access the Texas SAR private website. Remember search engines will find and use the verbiage inside pdf files. Therefore, the captions within pdf files with images will be included in the search.

Easy research uses the search options identified in the Search Tips. Take advantage of search keywords and use the leading + and – options to require or exclude certain data. It should not be difficult to quickly come up to speed researching artifacts.