

ADS-easy: Handbook

SEPTEMBER 30 2020

Archaeology Data Service



Introduction

The ADS-easy system allows depositors to upload digital content and associated metadata from archaeological fieldwork and research securely to the ADS, from where it can be added to the growing list of resources within the archive catalogue.

ADS- easy allows you to:

- create and manage projects more effectively
- generate project metadata as the basis of the resource discovery metadata
- submit digital data directly into the repository
- support a selection and retention policy through an ability to add and remove data, according to specific criteria
- generate consistent costing information, using the costing calculator
- automate the creation of technical metadata
- enhance data through the creation of file-level metadata which can be created within the interface, or uploaded using pre-populated templates
- submit your archive to the ADS repository

ADS-easy offers significant advantages to depositors over traditional methods of archive creation and submission, allowing for:

- data management from the outset of a project
- implementation of time efficiency measures for both depositor and archive
- flexibility in the creation of the digital archive
- involvement in selection and retention
- control over the costs and economics of deposition
- provide security during the submission phase.

ADS-easy is best used for **small to medium sized** archives, by which we mean archives of around 1000 files of a common type. The system works best with projects that contain straightforward file types, such as text, images, spreadsheets and CAD files.

ADS-easy complements the use of the OASIS system so is especially useful for depositing the digital outputs of fieldwork projects where you are happy with a simple, downloads-only archive interface.

ADS-easy will accept the following data types

- Database
- Documents & Reports (Text Documents)
- Geophysics
- GIS

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- Maps & Plans (Vector Graphics)
 - Photographs & Images (Raster Images)
 - Spreadsheets

Currently ADS-easy **does not** allow the submission of '3D Models, Visualisation, and Virtual Reality', 'Audio', 'GIS (Geodatabases)', 'Harris Matrices', 'Laser Scanning', 'LIDAR and Satellite Imagery', 'Linked Data', 'Markup Language', 'Medical Imaging', 'Photogrammetry', 'Polynomial Texture Mapping (PTM) and Reflectance Transformation Imaging (RTI)', and 'Video and Moving Images'. The large file sizes associated with these data types preclude their submission via web upload. Submissions that include these data types are accepted, but deposition of such data comes via other means.

Costing Calculator



The purpose of ADS-easy is to make it easier for archaeologists to deposit their small to medium-sized archives. While generating an actual costing for depositing the archive is part of that process, users can also use the **Costing Calculator** as a planning tool to determine what, and how much, they wish to deposit. You can use the costing calculator at any time without logging in or creating an account.

As a guide to the costs of deposition, the calculator allows depositors to see charges for individual items in a dataset costs, allowing you to plan and manage data accordingly. If your project requires includes data types not accepted through ADS-easy, or if a definitive costing is required (especially for AHRC, NERC or other academic funding applications) users are encouraged to [contact us](#) directly.

The ADS' [Charging Policy](#) provides detailed information on the costs associated with deposition.

Workflow

In this activity, you will learn how to use the costing calculator.

1. Open url: <http://archaeologydataservice.ac.uk/easy/>.
2. Go to the costing calculator.
3. In order to create a costing the calculator then needs to know the 'data types', 'file format' and 'quantity of files' you are likely to deposit.

For example, to get a costing for a series of archaeological reports created in Microsoft Word, you would select 'Documents & Reports' from the '**Data Type**' drop-down. Select the appropriate '**File Extension**' from the drop-down that appears. You should then add the '**Quantity**' of files that you wish to deposit.

4. When completed click on the '**Add**' button to include the item in the costing. The details will appear in the table below.

If you have not used the costing calculator before please read the [Costing Calculator help page](#) to understand when you should use the calculator, how our charges work and how long your estimate will be valid for.

Data Type: Extension: Quantity:

Data Type	File Extension	Quantity	File Preservation Cost	Remove
Photographs & Images	jpg	300 files	£67.23	<input type="button" value="x"/>
Spreadsheets	xlsx	3 files	£18.00	<input type="button" value="x"/>

Costing:

Number of Files:

Figure 1: Costing Calculator: Adding data to a costing.

- The 'exception' to this approach is 'Geophysics', where charges are levied based on the 'Area Size' (expressed in hectares).¹

If you have not used the costing calculator before please read the [Costing Calculator help page](#) to understand when you should use the calculator, how our charges work and how long your estimate will be valid for.

Data Type: Area Size (in hectares, whole numbers only please):

Data Type	File Extension	Quantity	File Preservation Cost	Remove
Photographs & Images	jpg	300 files	£67.23	<input type="button" value="x"/>
GIS	tif & tfw	2 files	£4.00	<input type="button" value="x"/>

Costing:

Number of Files:

Figure 2: Costing Calculator: Adding geophysical data to a costing.

- This process is repeated for each data type and file extension you wish to deposit. **Please take care when selecting the data types as some file extensions can be used by more than one data type.**
- The calculator provides a 'File Preservation Cost', giving the total cost per item, according to the data type, file extension, and the quantity.
- The [x] button, in the right column, allows users to remove an item from the costing.
- Beneath the table the 'Total (inc. VAT)', for the whole submission, is given. The 'total' table also includes information 'Number of Files', 'Number of Hectares' (if submitting 'Geophysics'), 'Startup Fee' and 'Subtotal (exc. VAT)'.

¹ The ADS encourages that geophysical data be submitted as a single, pre-processed composite file of raw data, but are aware that the nature of such surveys mean that the submission may also include a larger number of data files, depending on how the survey was conducted. This ensures that that the depositors are not overcharged based on the number of files submitted.

If you have not used the costing calculator before please read the [Costing Calculator help page](#) to understand when you should use the calculator, how our charges work and how long your estimate will be valid for.

Data Type:

Data Type	File Extension	Quantity	File Preservation Cost	Remove
Photographs & Images	jpg	300 files	£67.23	<input type="button" value="x"/>
GIS	tif & twf	2 files	£4.00	<input type="button" value="x"/>
Geophysics (+ tif)	N/A	5 hectares	£36.33	<input type="button" value="x"/>

Costing:

Number of Files	302
Number of Hectares	5
Startup Fee (Ingest, Interface, Admin, Management Costs)	£200.00
Subtotal (exc. VAT)	£307.56
TOTAL (inc. VAT)	£369.08

Figure 3: Costing Calculator: Total for submission.

- When you are happy with your costing, you can download the costing as a PDF by clicking on the **Download Estimate** button at the bottom of the screen.

Note: The 'estimate' produced using the costing calculator are not saved by the ADS; consequently, it may be worthwhile downloading the results for your own records.

Registering for an ADS-easy Account

In order to use ADS-easy we ask that users complete a registration form with some basic contact details about you and, if appropriate, the organisation you represent. This information is required in case we need to contact you if there is a problem with the archive, this information also forms part of the collection metadata that means that you, and your organisation, receive all the credit for you archive. On a more practical level, this information is also used to auto-complete certain fields within metadata forms saving you time.

Workflow

1. **Register** for an ADS-easy account by clicking the 'Register for ADS-easy' button on the ADS-easy homepage.

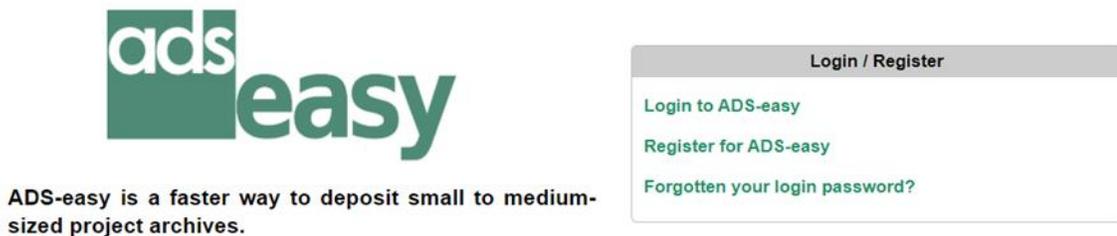


Figure 4: Registration: Registration for ADS-easy

Alternatively, you can select '**Login**', on the top right of the homepage. From the resultant login page, select '**Click here to register**'.²

2. Fill out your details. The details you provide will become part of the metadata when you add projects and data. If you will want to use ADS-easy in the future make sure these details are appropriate and correct. All fields marked with * are mandatory and the password is case sensitive.
3. When you have completed the form, please read the ADS 'Privacy Policy' and accept the 'Terms and Conditions'. To confirm that you acceptance 'tick' the 'Yes, I agree to the ADS Privacy Policy and Terms and Conditions'.
4. Click '**Submit**' button to complete the process

² You can delete your account at the end of this workshop. Send an email to the ADS Helpdesk (help@archaeologydataservice.ac.uk) with the login name you used to register and we will remove your detail, metadata and all the data submitted.

Telephone	STD:		Phone Number:	
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Terms and Conditions

The ADS uses the information you provide above to manage your account and data deposits. We will not share this information with anyone unless we have explicit permission from you. You can find out more about how the ADS uses your information and keeps it safe in our [Privacy Policy](#).

By registering with ADS-easy you are agreeing to the ADS [Terms and Conditions](#). Please tick the box below to indicate you have read and agreed to the ADS [Terms and Conditions](#) and you agree to the ADS using your information as set out in the ADS [Privacy Policy](#).

Yes, I agree to the ADS [Privacy Policy](#) and [Terms and Conditions](#).

Figure 5: Registration: Registration, accept 'terms and conditions'.

5. A confirmation email will confirm that registration process is complete. Once received you will be able to login in to your ADS-easy account immediately following registration.
6. You can update your details using the '**Account Details**' link (below the website header). Make any necessary changes and click '**Save**' to submit these details to the database.

Note: All records associated with your account use your email address; as a result, we cannot change your email address through the ADS-easy interface. If this change is required then please [contact us](#) and we will endeavor to make that change for you.

Creating a New Project

Individual archaeological projects should be deposited as separate archives. Creating a submission through ADS-easy is a four-step process.³

Managing Submissions

1. **Login** to ADS-easy.
2. Once logged in, the **'Projects'** page provides a full list of **'Open Projects'** and **'Submitted Projects'**.

Creating a New Project (with an OASIS Id)

If information on your project has already been added to [OASIS](#), and you have an OASIS ID, then you can use these details to pre-populate fields within the project metadata section. Metadata imported from OASIS provides a useful starting point for metadata creation. Depositors should check all metadata imported from OASIS to ensure accuracy and are encouraged to enhance this metadata to improve the documentation and findability of your submission.

Workflow

1. Start a new project by clicking on the **'New Project'** link.

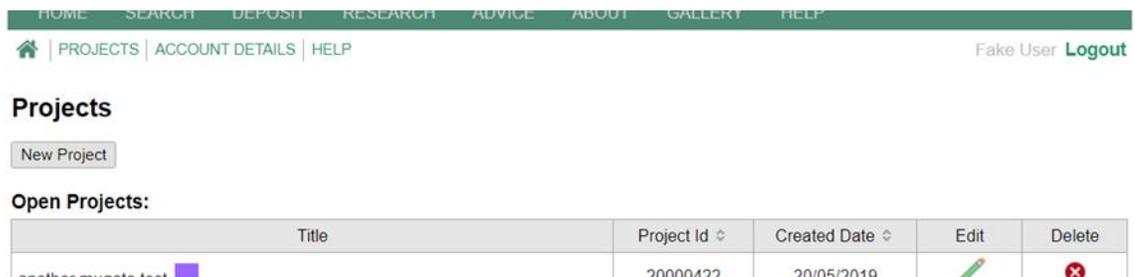


Figure 6: New Project: Creating a 'new project'.

2. If information on the project has submitted through OASIS, you can import the record into ADS-easy as a starting point for the 'project metadata.

Click the **'I have an OASIS Id'** button.

3. When prompted enter the OASIS Id, for example, 'wessexar1-181106'.

³ The ADS provide a test dataset should it be required. (1. Download the ADS-easy Practical dataset from <http://archaeologydataservice.ac.uk/learning/HeritagePracticeWorkshop2017.xhtml> 2. Unzip the file and save to your computer.).

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Fake User [Logout](#)

Please enter the OASIS Id for the project in the textbox below

The OASIS Id for your project is formed from an organisation prefix (e.g. acarchae2, foundati1, yorkarch1) and a project number (e.g. 52671, 5186, 87126). The OASIS Id should be entered like this, *acarchae2-52671*, *foundati1-5186* or *yorkarch1-87126*.

OASIS Id:

Note that after the form is pre-populated with OASIS data, you will still have to complete blank mandatory fields before the form can be saved.

If you do not have an OASIS Id, or it is invalid, [please create a new project](#).

Figure 7: New Project: Entering an Oasis Id to create metadata.

Click **'Submit'** to begin the import process.

4. The **'Step 1: Project Details'** will open and allow you to add and edit the project details. Some fields within this form are mandatory (marked with an asterisks [*****]) and must be completed before the form can be submitted. The extent of the imported data is very much dependent on the completeness of the OASIS form.

Details on 'people' and 'organisation(s)' involved in the creation, copyright, any associated funder(s) and the licence holder require completion. It is important these details are accurate as these express any (legal) rights holders for the dataset. The ADS encourages the use of [ORCID](#)'s to facilitate the identification of individuals. Identification of the individual, who can sign the deposit licence ('licence holder') on behalf of your organisation, ensure that any delays in processing the dataset will be reduced.

Note: A wider discussion on adding and editing project metadata is found below.

Creating a New Project (without an OASIS Id)

Workflow

1. If you are using your own metadata, or in instances where you project does not have an OASIS Id, then you should choose **'I do not have an OASIS ID'** option.
2. The **'Step 1: Project Details'** will open and allow you to add and edit the project details.

Adding and Editing Project Details

Step 1: Project Details

Whether you are using the OASIS ID or entering your project's details manually this information provides context for your archive and the digital data contained within it. This information is also 'recycled' and used to create the project metadata entry within the ADS Catalogue allowing others to find and retrieve your archive and its associated data. Making this information as accurate and complete as possible is important as it means we can more effectively process your project now, and allows others to find and use your data in the future.

Workflow

In this activity, you will learn how to **add**, **edit** and **remove** project metadata.

1. If you have used an OASIS Id some of the collection level metadata fields should be automatically filled. In order to complete the 'Project Details' form you will need to add additional information and may need to make changes to some of the existing metadata.

The screenshot shows the 'New Project' form with four steps: STEP 1: Project Details (active), STEP 2: File Upload, STEP 3: Edit Metadata, and STEP 4: Submission. Below the steps, there is a warning message: 'In order to deposit your archive we need some information about your project. It is important that the information you provide is as accurate and complete as possible as it will form the resource discovery metadata which allows others to find your data. It is also your responsibility to ensure this form is filled out in accordance with the General Data Protection Regulation and the Copyright, Designs and Patents Act 1988. If you are not the Licence Holder, Copyright Holder or Data Creator, it is your responsibility to ensure you have the correct permissions to provide their details to us and upload and deposit their data with the ADS.'

Project Name*	Erlescote Manor: Archaeological Excavation and Watching Brief
Description*	Excavation recorded Saxo-Norman settlement features comprising a ditch and a possible moat. A Medieval ditch was also identified along with Post Medieval wall foundations, postholes, demolition rubble and two ditches. A subsequent watching brief identified a further Medieval ditch. (3716 chars remaining)
Language*	Add
Identifier	Sitecode Identifier: EME00

Figure 8: Step 1: Mandatory fields.

- Note:** Those fields marked with asterisk [*] are 'mandatory fields'. The completion of these fields is required in order to submit the form.
2. To add metadata to a field you will need to use the 'add' button and then insert the required term or information.
 3. To remove a term use the [x] button on the right of the entry.

Figure 9: Step 1: Remove fields.

4. Adding an **'Identifier'**. Click 'add', select the appropriate identifier type from the drop-down list, and then add the identifier.
5. Adding individual and organisation information to the form. Depositors are free to add 'First Name', 'Last Name' and 'Organisation' information for individuals, or simply 'Organisation' details. Where possible depositors are encourage to use an 'Orcid Id' to facilitate the identification of individuals.

Note: It is important that the correct 'Data Creator(s)', 'Licence Holder' and 'Copyright Holder(s)' and are identified.

Note: When adding 'Licence Holder' we ask for the 'email' address of the person who will sign the deposit licence on behalf of the organisation. It is important that this is a direct email to ensure the issue of the digital licence to correct person. This reduces delays for the submission process.

6. A list of **'Subject Keywords'** are imported from OASIS but depositors are encouraged to add additional terms.

Click 'add' to submit a new term. Select the appropriate 'Subject Keyword' type from the drop-down menu.

Some of the keywords, for example 'Monument Type (class)', are added using additional drop-down lists.

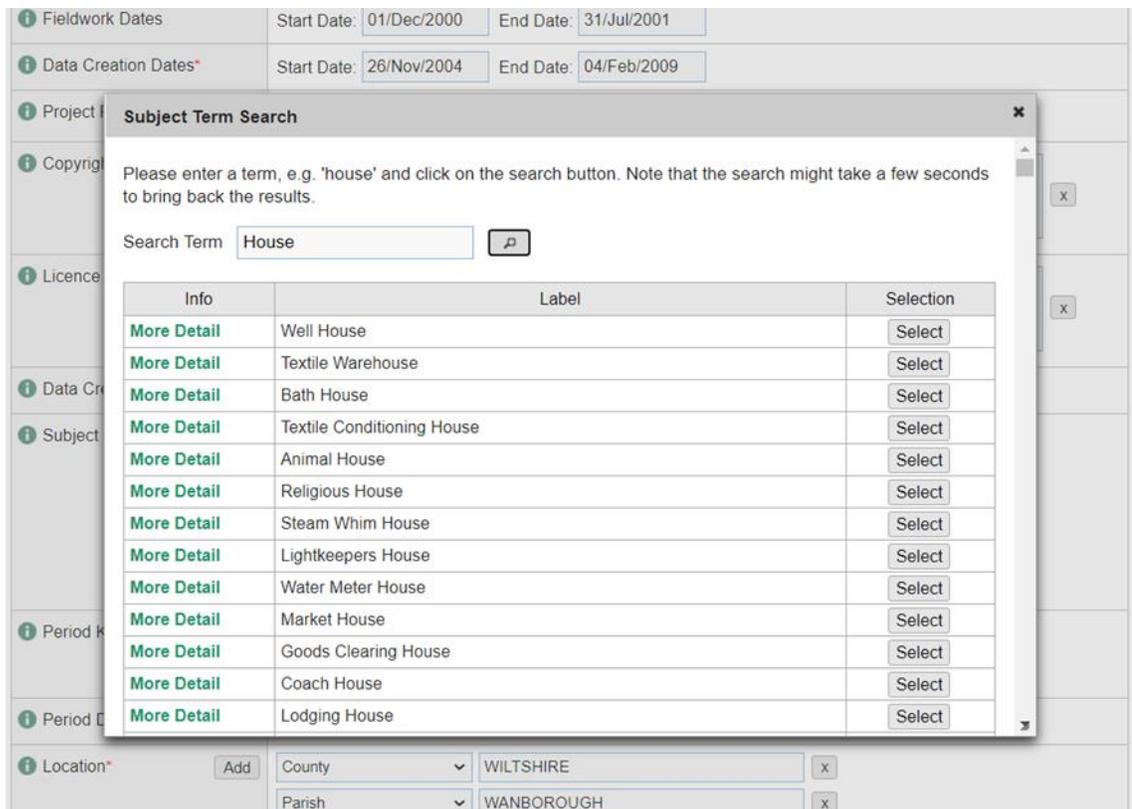


Figure 10: Step 1: Adding search terms using the thesauri lookup.

Other keywords are entered using online thesauri, for example **'Monument Type (England)'**, **'Monument Type (Scotland)'**, **'Monument Type (Wales)'**, **'FISH Archaeological Objects (England)'**, **'Archaeological Objects (Scotland)'**, **'Event Type (England)'** and **'Evidence (England)'**. To add a term, select the appropriate thesauri from the list. To look up a term up click **'Search'**. A pop-out window will appear (see above) and a 'search term' added. Click the button to submit the search. This will return a list of terms, from which the 'Select' button can be used to add the most appropriate term. If you are unsure about the meaning of the term, the 'More Detail' button will provide additional information.

If a term does not appear in the lists, then you can add your additional terms. Select **'Other'** from the drop-down list, and add the term in the box to the right.

7. The import process from OASIS will add **'Period keyword(s)'** to the metadata, but additional terms may also be included.

'MIDAS' period terms can be added by selecting **'MIDAS'**, and using the drop-down list. The ADS also uses dedicated online thesauri, for example **'Period (England)'** and **'Period (Wales)'**, for the submission of period terms. Select the appropriate thesauri, click 'Search', and a pop-out window will appear. Enter the term and return the results. Use the 'Select' button to add the appropriate term. If you are unsure about the meaning of the term, the 'More Detail' button will provide additional information.

8. **'Period Dates'** are also a required field. In instances where you are adding dates before the Common Era they should be preceded by a negative (-) symbol, e.g. -40. Dates within the Common Era are entering as simple numbers, e.g. 2016.
9. **'Location Coordinates'** can be added in either OSGB or Longitude/Latitude.

Note: Numeric, six, eight or ten-figure references should be used for OSGB coordinates, for example, Easting: 460018, Northing: 452174. Similarly, the use of decimals should be used longitude/latitude references, for example, Latitude: 53.962180, Longitude: -1.0867160.

10. Once the form is complete use the 'Save' button to save the metadata and submit the information for evaluation.
11. Any problems or 'warnings' will be identified at the top of the form.

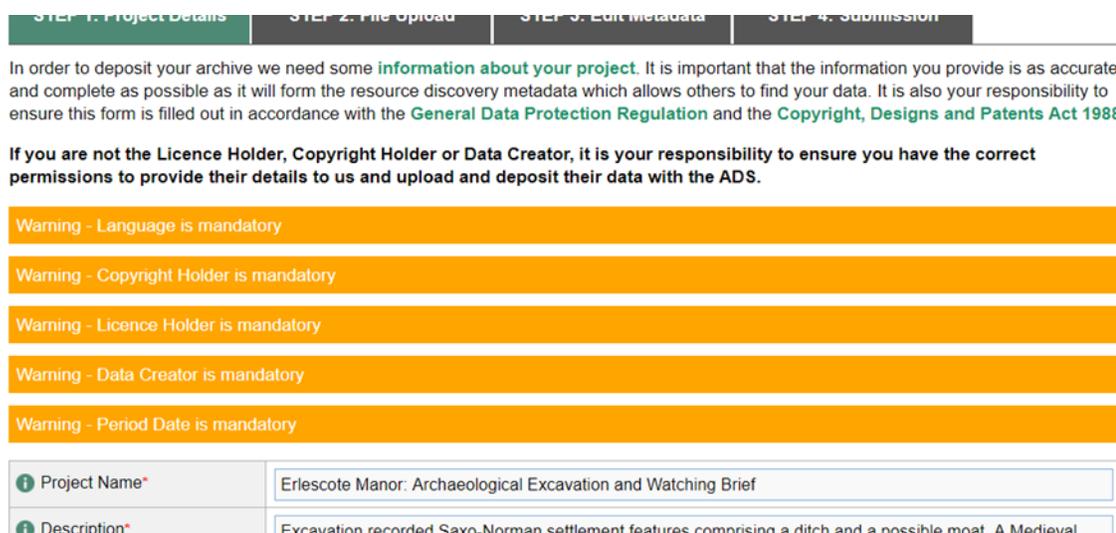


Figure 11: Step 1: error messages.

12. Once errors have been addressed, the form will be saved and you will be able to move to the next step.

You can still return to this page to make changes to the form, although remember to click 'Save' any changes when you have finished.

Uploading Data

Step 2: File Upload

While the ADS is able to accept most of the major file formats, there are some which may be problematic, consequently we ask that you consult our [Guidelines for Depositors](#) for information on the formats we currently accept. The ADS provides some specific advice on [preparing datasets](#), specifically ensuring that all files adhere to the ADS' [file naming strategy](#).

STEP 1: Project Details | **STEP 2: File Upload** | STEP 3: Edit Metadata | STEP 4: Submission

All files uploaded must adhere to the ADS's [file naming strategy](#). If your data includes a file type not listed below please [contact us](#) for more information. Before uploading data we ask that depositors take time to read the ADS [Guidelines for Depositors](#) which includes important information on our [accepted file formats](#) and [file-level metadata](#) requirements.

It is your responsibility to make sure all data you upload is compliant with the [General Data Protection Regulations](#). Please ensure you have permission from all copyright holders to deposit data with the ADS before uploading.

Note that the upload limit for an ADS-easy project is 1000 files. Currently, you have uploaded **0 files**.

Click on a data type below to upload your files. Once you have uploaded all your files please move on to Step 3.

- DATABASE**
.accdb, .csv, .dbf, .json, .mdb, .odb, .rdf, .tsv, .txt, .xml
- DOCUMENTS & REPORTS**
.doc, .docx, .odt, .pdf, .txt
- GEOPHYSICS**
.csv, .dat, .rep, .sgy, .segy, .txt
- GIS**
.shp (and assoc files), .jpg, .jpw, .tif, .tif, .tiff, .png, .pgw, .gml, .mif, .mid, .e00
- MAPS & PLANS (VECTOR)**
.dwg, .dxf, .svg
- PHOTOGRAPHS & IMAGES (RASTER)**
.bmp, .dng, .gif, .jpg, .pdf, .png, .tif
- SPREADSHEETS**
.csv, .ods, .pdf, .txt, .xls, .xlsx

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Figure 12: Step 2: using the appropriate data type area.

Files added to a submission through ADS-easy require the use of the correct data type uploader. Click on the appropriate data type button for the files you wish to upload. For example, click on 'Documents and Reports' to upload text based files.

Workflow

1. Select the appropriate 'data type' upload area for your data from the list in 'Step 2: File Upload'.

Upload Documents and Reports Back to Step 2

Drag and drop files into the box below (or select 'Choose') then click the 'Upload' button. If you need to delete any files please do it from Step 3. Note that valid file types are: **doc, docx, odt, pdf, txt**.



Figure 13: Step 2: Using the appropriate upload area.

2. Use the 'upload' window to add data to the submission. Depending on your browser and settings, you may be able to 'drag-and-drop' files into the (smaller) download window.⁴ Alternatively, you can select '+Choose' from the interface, navigate to the file in your local directory, select the file and click 'Open' to add the file to the list.

Note: Single, or multiple, files may be uploaded during the process. Depending on bandwidth, it may be more appropriate to submit files in smaller batches.

3. Once uploads are complete, use the 'Upload' button to submit the files.

Note: The interface may produce an error message in instances where the upload includes file with an incorrect file type, or file with an unaccepted extension for that data type.

Upload Documents and Reports Back to Step 2

Drag and drop files into the box below (or select 'Choose') then click the 'Upload' button. If you need to delete any files please do it from Step 3. Note that valid file types are: **doc, docx, odt, pdf, txt**.

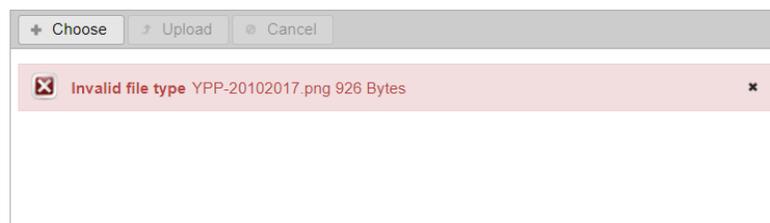


Figure 14: Step 2: Error reporting.

Note: If your file name includes non-standard or 'illegal' characters, those listed in the [file naming strategy](#), then a warning message may be displayed and file affected file will not be uploaded.

⁴ The 'drag-and-drop' facility may not work when using *Internet Explorer*. If your browser does not support the 'drag-and-drop' functionality then use the '+Choose' function will allow data to be uploaded. Alternatively, you may wish to use a different browser.

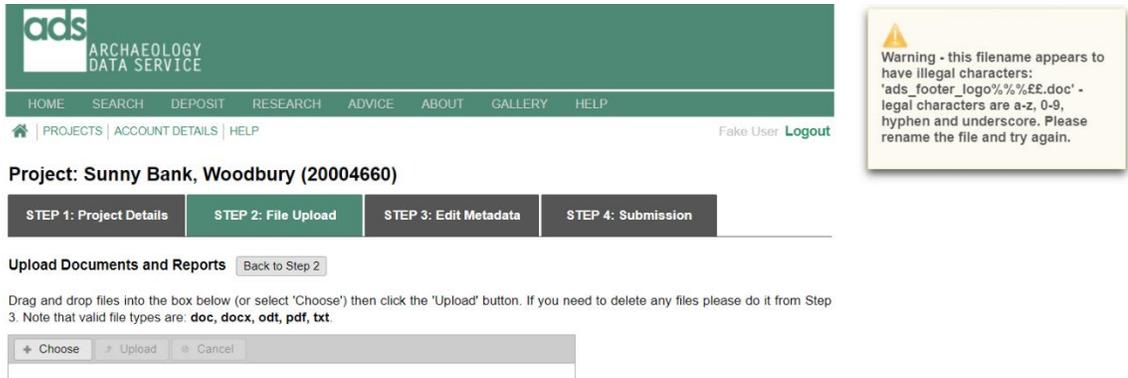


Figure 15: Step 2: File name warning message.

4. Uploading ‘GIS’ files. GIS data involves creation of multiple, interdependent files that are required in order for the GIS to function. Once uploaded these files will be automatically ‘grouped’ together as a single entity, using the filename, to facilitate the creation of metadata. Each ‘group’ is subject to a single charge.

Uploaded Files:

Group	Date	Files
Rectified_Image	29-Sep-2020 14:55:38	Rectified_Image.tfw Rectified_Image.tif

Figure 16: Step 2: GIS files uploaded in this session.

5. Uploading ‘Geophysics’ data. While ADS suggests that geophysical data is submitted as a single, pre-processed, composite file of raw data, in the CSV format, it is possible that some techniques will produce multiple files. As a result, depositors should add a distinct ‘Group Name’ for each discrete area surveyed.

First, enter a suitable Group Name, then upload your files:

i Group Name:

Current Group Name: **My geophysical survey**

ZooMS_Modified5.csv	256.0 KB	<input type="text"/>	<input type="button" value="x"/>
ZooMS_Modified6.csv	256.0 KB	<input type="text"/>	<input type="button" value="x"/>
ZooMS_Modified7.csv	256.0 KB	<input type="text"/>	<input type="button" value="x"/>
ZooMS_Modified8.csv	256.0 KB	<input type="text"/>	<input type="button" value="x"/>

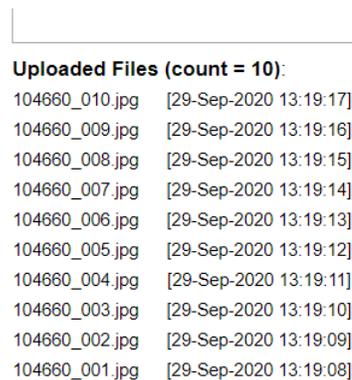
Figure 17: Step 2: Uploading geophysical data.

To commit the ‘group name’ depositors should ‘**Submit**’ the name. The name will appear beneath.

Once established you can begin uploading files using 'drag-and-drop' or '+Choose' functions (described above).

Note: When submitting Geophysics data depositors must also submit a geo-rectified TIF of the results of the survey.

6. A list all uploaded files in this session will appear within the interface (below the upload window). This includes a 'count' of all files successfully uploaded; with a list of all file names and the date of submission.



Uploaded Files (count = 10):	
104660_010.jpg	[29-Sep-2020 13:19:17]
104660_009.jpg	[29-Sep-2020 13:19:16]
104660_008.jpg	[29-Sep-2020 13:19:15]
104660_007.jpg	[29-Sep-2020 13:19:14]
104660_006.jpg	[29-Sep-2020 13:19:13]
104660_005.jpg	[29-Sep-2020 13:19:12]
104660_004.jpg	[29-Sep-2020 13:19:11]
104660_003.jpg	[29-Sep-2020 13:19:10]
104660_002.jpg	[29-Sep-2020 13:19:09]
104660_001.jpg	[29-Sep-2020 13:19:08]

Figure 18: Step 2: Files uploaded in this session.

7. To submit additional files of a different data type, you can return to the data type menu by clicking '**Back to Step 2**'. You can then make another choice and add files.

Adding and Editing File Metadata

Step 3: Edit Metadata

Once files have uploaded data (via Step 2) files will appear in ‘**Step 3: Edit Metadata**’, although this section also allows depositors to delete files from the submission and see the overall cost for the submission.

The table includes details on the contents of the submitted dataset (‘filename or group’, ‘data type’, ‘file count’ and ‘total file size’), alongside each file or groups metadata ‘status’ (pending or complete).

Costing: The total cost of your 15 files is **£269.97** (or £224.97 excluding VAT).

<input type="checkbox"/>	Filename or Group	Data Type	File Count	Total Filesize	Status	Edit Metadata
<input type="checkbox"/>	WCM102031_Archive_Part2.pdf	Docs & Reports	1	11.2 MB	Pending	
<input type="checkbox"/>	My geophysical survey	Geophysics	0.0 hectares	1 MB	Pending	
<input type="checkbox"/>	Rectified_Image	GIS	2	512 KB	Pending	
<input type="checkbox"/>	WCM102031_section.dwg	Maps & Plans	1	27.2 KB	Pending	
<input type="checkbox"/>	104660_001.jpg	Photos & Images	1	8.7 MB	Pending	

Figure 19: Step 3: Adding metadata or editing the uploaded dataset.

Adding metadata

Workflow

1. Each file submitted as part of a dataset requires discrete metadata dependent on its data type. The ‘Status’ of each file is displayed in the interface, with those requiring additional metadata marked as ‘Pending’.
2. To add, or edit, metadata for a file, users should click the ‘[Pencil icon]’, in the Edit Metadata field.
3. The metadata form for that data type will appear and depositors should complete the form as completely as possible.

Note: Those fields marked with asterisk [*] are ‘mandatory fields’. The completion of these fields is required in order to submit the form.

Document / Report Metadata Back to Step 3

Success - your metadata details were successfully updated, please go back to Step 3

i Object Id	20037491																		
i Filename	WCM102031_Archive_Part2.pdf																		
i Title*	<input type="text" value="This is the title"/>																		
i Abstract*	<div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;">This is an abstract.</div> <p>(3980 chars remaining)</p>																		
i People Involved* Add	<table border="1"><tr><td>Copyright</td><td>▼</td><td>First Name: <input type="text"/></td><td>Last Name: <input type="text"/></td><td>Org: <input type="text" value="Archaeology Practitioner"/></td><td><input type="button" value="x"/></td></tr><tr><td>Author</td><td>▼</td><td>First Name: <input type="text" value="Jim"/></td><td>Last Name: <input type="text" value="Brown"/></td><td>Org: <input type="text"/></td><td><input type="button" value="x"/></td></tr><tr><td>Editor</td><td>▼</td><td>First Name: <input type="text" value="Jane"/></td><td>Last Name: <input type="text" value="Smith"/></td><td>Org: <input type="text"/></td><td><input type="button" value="x"/></td></tr></table>	Copyright	▼	First Name: <input type="text"/>	Last Name: <input type="text"/>	Org: <input type="text" value="Archaeology Practitioner"/>	<input type="button" value="x"/>	Author	▼	First Name: <input type="text" value="Jim"/>	Last Name: <input type="text" value="Brown"/>	Org: <input type="text"/>	<input type="button" value="x"/>	Editor	▼	First Name: <input type="text" value="Jane"/>	Last Name: <input type="text" value="Smith"/>	Org: <input type="text"/>	<input type="button" value="x"/>
Copyright	▼	First Name: <input type="text"/>	Last Name: <input type="text"/>	Org: <input type="text" value="Archaeology Practitioner"/>	<input type="button" value="x"/>														
Author	▼	First Name: <input type="text" value="Jim"/>	Last Name: <input type="text" value="Brown"/>	Org: <input type="text"/>	<input type="button" value="x"/>														
Editor	▼	First Name: <input type="text" value="Jane"/>	Last Name: <input type="text" value="Smith"/>	Org: <input type="text"/>	<input type="button" value="x"/>														

Figure 20: Step 3: Adding document/report metadata.

4. The 'Save' button commits the metadata to the database.
5. 'Error messages', at the top of the form, will highlight problems with the metadata, including incomplete 'required fields'. Addressing these issues will allow the submission of the metadata form.
6. A 'success' message will appear at the top of the form if the metadata has been successfully saved.
7. Once complete, the 'Back to Step 3' button allows the submission of metadata for other files.

On returning to 'Step 3' the 'status' of the file will be changed to 'Complete' if the all the metadata fields have been successfully completed.

Costing: The total cost of your 15 files is **£269.97** (or £224.97 excluding VAT).

<input type="checkbox"/>	Filename or Group	Data Type	File Count	Total Filesize	Status	Edit Metadata
<input type="checkbox"/>	WCM102031_Archive_Part2.pdf	Docs & Reports	1	11.2 MB	Complete	
<input type="checkbox"/>	My geophysical survey	Geophysics	0.0 hectares	1 MB	Pending	
<input type="checkbox"/>	Rectified_Image	GIS	2	512 KB	Pending	
<input type="checkbox"/>	WCM102031_section.dwg	Mans & Plans	1	27.2 KB	Pending	

Figure 21: Step 3: Metadata completed.

Submitting image metadata

Workflow

1. To facilitate the creation of image metadata the ADS has implemented a system that allows users to upload a 'template' of metadata that can be completed outside of the ADS-easy system.

If you have many photos or images, click on the download button below to download the image metadata template spreadsheet, then fill in your metadata and upload it to ADS-easy. Please note that you can only upload Photos & Images using the template.

Download: [Download image template](#)

Upload: [Upload image template](#)

Costing: The total cost of your 15 files is **£269.97** (or £224.97 excluding VAT).

<input type="checkbox"/>	Filename or Group	Data Type	File Count	Total Filesize	Status	Edit Metadata
<input type="checkbox"/>	WCM102031_Archive_Part2.pdf	Docs & Reports	1	11.2 MB	Complete	

Figure 22: Step 3: Download/upload metadata template.

2. Download the image spreadsheet, using the ‘**Download image template**’ link, and save the XLSX file to your local drive.

Alternatively, the metadata spreadsheet can be completed prior to the submission of data. The same template disseminated is available from the ‘[Downloads and Quick Links](#)’ section of the ‘[Guidelines for Depositors](#)’.

Filename	Caption	Subject Keyword 1	Subject Keyword 2	Subject Keyword 3	Period Term 1 (MIDAS)	Period Term 2 (MIDAS)	Period Term 3 (Other)	Period Start Date (BC date should be prefixed using a minus symbol).	Period End Date (BC date should be prefixed using a minus symbol).	Creator First Name	Creator Last Name

Figure 23: Step 3: Adding metadata using the spreadsheet template.

Note: Formatting, and number formats for discrete fields, should remain unchanged when using the template. Any changes can cause the upload of the template to fail. Caution should be taken when copying and pasting information from elsewhere that these remain unchanged.

Note: Matching between the metadata record (in the template) and the file requires parity between the spreadsheet and uploaded data. Depositors should ensure that the filename documented in both locations is the same. Updates to filenames, in order to comply with the [file naming strategy](#), may form part of the upload process. Spaces, for example, will become underscores.

Note: ‘Location’ terms can be added as a comma separated list (e.g. England, Yorkshire, York, King’s Manor).

Note: The format of ‘creation date’ should follow the form noted in the template (e.g. 29/09/2020).

3. The ‘**Upload image template**’ link allows the upload of metadata to ADS-easy.

Upload Image Metadata Back to Step 3

Please drag-and-drop the image template file into the box below (or select 'Browse'), then click the 'Upload' button. Note that you can add import more than one spreadsheet but please ensure that a spreadsheet has only one row per filename.

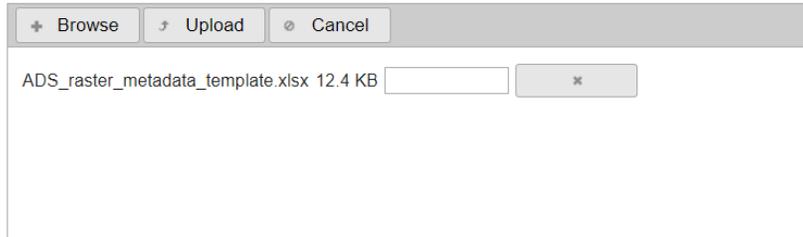


Figure 24: Step 3: Uploading metadata to ADS-easy.

4. If the upload has been successful then a message will appear at the top of the upload window ('Success – the data import was successful...').
5. If there has been a problem with the upload then an 'error message' will appear at the top of the upload page.

A further upload of an updated version of metadata template may be required to address problems.

6. The form, or a further submission of the template, are used to edit metadata once the spreadsheet has been successfully uploaded.

Adding 'supporting documentation'

Workflow

1. Some data types (e.g. **Database, GIS, Maps & Plans, and Spreadsheets**) require the submission of additional attributes, or supporting, documentation to provide additional metadata about files. This metadata is stored as an external file and uploaded through the form.

Figure 25: Step 3: Uploading supplementary or additional metadata.

In submission of ‘Databases’ and ‘Spreadsheets’, for examples, require the submission of ‘table and field attributes’. While ‘Maps & Plans’ should be accompanied by ‘layer or drawing conventions’ documentation. All four allow the upload of ‘supporting documentation’.

2. The ‘drag-and-drop’ or ‘+Browse’ function can be used to add ‘supporting documentation’ to the metadata. A list of ‘accepted formats’ for documentation can be found in the interface. Use the ‘Upload’ button to submit the file.
3. The removal of ‘supporting documentation’ requires the use of the ‘Delete’ link.

Delete Selected Files

Workflow

1. The removal of files from the submission requires ‘selecting’ the row and the use of the ‘**delete selected rows**’ button. Depositors can select and delete multiple rows, or delete all files in the submission by clicking the ‘tick’ field at the top of the table.

Costing: The total cost of your 8 files is **£277.18** (or £230.98 excluding VAT).

<input type="checkbox"/>	Filename or Group	Data Type	File Count	Total Filesize	Status	Edit Metadata
<input checked="" type="checkbox"/>	WCM102031_Archive_Part2.pdf	Docs & Reports	1	11.2 MB	Complete	
<input type="checkbox"/>	My geophysical survey	Geophysics	0.5 hectares	1 MB	Complete	
<input type="checkbox"/>	Rectified_Image	GIS	2	512 KB	Complete	
<input type="checkbox"/>	WCM102031_section.dwg	Maps & Plans	1	27.2 KB	Complete	
<input type="checkbox"/>	104660_001.jpg	Photos & Images	1	8.7 MB	Complete	
<input type="checkbox"/>	104660_002.jpg	Photos & Images	1	8.9 MB	Complete	
<input type="checkbox"/>	104660_003.jpg	Photos & Images	1	9 MB	Complete	
<input type="checkbox"/>	Severn_Street_All_Finds.xlsx	Spreadsheets	1	18.7 KB	Complete	

Figure 26: Step 3: Delete files from the submission.

Submitting your Archive

Step 4: Submission

Once the upload of all files is complete, and collection and file-level metadata added, the submission of the dataset should follow. Before submitting depositors should ensure that all the metadata and documentation is correct. If there are any issues then users can return to the appropriate section, update and save any necessary changes. Following submission depositors will be unable to change the dataset, or additional charges may be necessary to resubmit files or metadata, therefore it is important to ensure accuracy.

Any information about your project that may be useful to us and assist its preservation (as a whole) can be added, alongside any requests to ADS staff.

Workflow

1. In some instances, it may be necessary to provide additional information to assist in the preservation of the dataset. If this is the case, users are encouraged to add a **'Project Message'** for repository staff.
2. If your submission requires an embargo period, during which the data will be secured in the archive but not be accessible to the public, depositors should add the date when the archive can be made publicly available.

If you are considering an embargo date then please read the following [guidelines](#).

If you do not need an embargo date then leave the field blank.

3. If you are required to notify a third party about the submission then use the check box. Depositors can then add the 'email address', alongside an 'optional message', which will be added to the email when the project is submitted.
4. Contact details for the individual responsible for invoicing are required as part of the submission process.

If this is the same as the deposit account holder then select 'Yes' from the drop-down list. Users can then add an optional 'purchase order' for the submission.

Where the person responsible for finance is not the individual submitting the dataset, the user should select 'No' from the drop-down list. Users will then be required to add the contact details for that person and, where necessary, a purchase order.

5. In instances where you have already received a formal costing from the ADS, then you are encouraged to include the 'ADS Tracking Id' to the documentation to facilitate the linking of

existing records and the submission. This particularly ensures the application of any agreed charges.

6. Once these fields are complete, depositors should read the terms of submission and, if agreed, 'submit project'.
7. Following submission the project will be 'locked' and you will not be able to add or remove data, or update the metadata.

Following submission

Following submission you will receive an email notification from the ADS-easy team (collections@archaeologydataservice.ac.uk) acknowledging the successful deposition of the dataset.

If you have elected to notify another person or organisation about the submission then emails will also be sent to the address provided, letting them know that you have submitted the data.

Project Summary and other information

Workflow

1. Following submission, a 'project summary' displays basic information about the dataset. This information can be physical printed using the 'print page' button.

Project Summary: TEST - Sunny Bank, Woodbury (20004660)

Print page

Success - your project was successfully submitted

This project has been submitted. If you have any queries please [contact us](#).

Project Id	20004660
Project Title	TEST - Sunny Bank, Woodbury
Project Description	An archaeological watching brief in the historic core of Woodbury, Devon revealed largely negative results.
Creation Start Date	11-Dec-2008
Creation End Date	12-Dec-2008
Project Message	Test this for tomorrow.

Download Costing PDF

Download Receipt File

Figure 27: Following submission: Project summary.

2. The summary page also includes a 'download costing PDF', allowing you to download and save detailed information about the charges for the submission.
3. Depositors can also 'download receipt file' for the deposition. This receipt includes a full list of all file names and file sizes for the submitted dataset.
4. Once the archive has been submitted the 'status' on the 'Projects' page will change to 'Submitted'. This will mean that you can no longer edit or delete the archive, but you will still be able to 'view' the project summary and download costing information and the deposit receipt.

I've just realised I made a mistake!

Do not worry. Despite all the best efforts, we all make mistakes. If you think that you have made a mistake with the submission, perhaps you have not uploaded all the files, or the wrong ones uploaded. Please let us know as soon as possible. Depending on how far in the process the archive is,

we will either re-open the ADS-easy archive, or ask you submit the file and appropriate updates and metadata manually. Any additional files or metadata will then be added the submission.

Unfortunately, if this happens following the release of the archive we may need to make a additional charge for the work.

Any problems with my archive?

Once submitted the deposition will added to a list of archives requiring the attention. Once it has reached the top of that list an archivist will evaluate the archive, check the data and ensure that the submission of necessary metadata.

The digital archivist will send you an email formerly acknowledging receipt of the dataset, and they will issue a more detailed deposit receipt (of the complete dataset). If the archivist identifies problems, they will let you know and request further information or clarification. Once any issues have been addressed, the archive will be formerly accessioned into the ADS systems.

Please be aware that it may always be possible to begin work on a submission immediately as the ADS can be very busy at peak times.

Deposit licence

On completion of the accession process, the issuing of a deposit licence follows. The issue of the deposit, to the individual identified in the project metadata, follows. This is a digital deposit licence, so requires the individual to follow a link, and agree to the terms and conditions set out.

If you receive the deposit licence, and you are not the appropriate person to sign it on behalf of your organisation, you should let us know immediately and we will issue a replacement to the correct person.

Similarly, if any of the information on the deposit licence is incorrect just send us an email, we will make the necessary changes and send out a replacement.

Once the deposit licence has been 'signed', we will add the archive to our workflow and preservation work will begin once a space becomes available.

Contacting the ADS

Archaeology Data Service
Department of Archaeology
University of York
The King's Manor
Exhibition Square
York
YO1 7EP

+44 (0)1904 323 954

help@archaeologydataservice.ac.uk

For the latest contact information, you asked to check the [contact us](#) page.

