

Records Management Portfolio:  
School of Information Management Website (2005-2006)

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## Project Overview

The website of the School of Information Management (or SIM) at Dalhousie University changed dramatically over the summer of 2005, when the school went from a standard XHTML website format to a site produced by Collage (a Content Management System, or CMS). This change offered the advantages of a standard “look and feel” for the University’s websites and greater ease of developing content for those unfamiliar with web design, but also took control over presentation away from the individual departments and created a number of problems from a records management standpoint.

### Project Goals and Objectives

Before beginning, we established an initial set of goals and objectives in order to guide our activities, as well as providing a way to evaluate our progress and eventual success.

First of all, we planned to carry out a comprehensive inventory, in order to establish the exact series involved, the numbers of files we would need to deal with, and the present disposition of those files.

Secondly, we planned to create a comprehensive set of retention policies, which would provide directions for ongoing backups and archives (the distinction between the two, at least in terms of this portfolio, will be made clear later). These policies would be carried out by Communications Assistants in future years, so they would have to be clearly written so that someone without a records management background (or at least,

a student who had not yet taken the course) would understand and be able to implement these policies.

Thirdly, we planned to develop a filing system and set of naming conventions that would be equally clear, and that would allow both the Programme Coordinator and subsequent Communications Assistants to find any file they require, as well as providing a framework for adding new files without undue difficulty.

Finally, we planned a comprehensive local filing system, which would be stored on a networked disk drive, and would contain a complete backup of the Collage content, as well as a comprehensive archive of each year's iteration of the SIM website.

### A Brief Discussion of Content Management Systems

There is a very important difference between locally managed websites and those administered by a CMS. Locally managed websites are complete and functional on a local machine, which stores the content as well as all the style and presentational elements in one place. These websites can be browsed, tested, or copied onto a CD without having to use the hosting server at all (though a local testing server may be needed for more complex websites). CMS-administered websites, on the other hand, are not locally accessible at all. Any content stored on the local file system is incomplete, and can only be viewed in its final form after passing through the CMS. There is, in effect, no local copy of CMS-managed websites at all, even though most of the actual content can be stored locally.

It may be helpful to think of each webpage in two major sections. The first section contains elements which define the webpage as a document, visual or stylistic elements (which determine how it will be displayed), and menu elements (which establish its

place within the hierarchy of the website as a whole). This first section is the same for each page on the website, and would provide consistency in formatting and navigation. The second section, then, contains the actual content of the webpage. This includes the text on the page, graphics to be displayed, and links not directly related to the website hierarchy. In a locally-hosted website, both of these sections are represented by the files on the local machine, and are accessible there. In a CMS-hosted website, on the other hand, only the second section can be on the local machine. The first section, or display elements, are managed by the CMS itself, and are not available without viewing the website through the CMS.

This difference, then, is the main reason that CMS-managed websites pose a problem from a records management and archives viewpoint. The website of the School of Library and Information Studies (SIM before the 2005-2006 school year re-branding) can be considered a complete record for the year before it was replaced, since it is stored locally and is fully functional on its own. Because of the use of Collage, the same cannot be said for the SIM website. This is especially true as there has been no attempt to keep copies of published content in the local filing system. In effect, the only record of the present SIM website content is the files and other information stored in Collage (Dalhousie's CMS). This is not an impossible challenge to overcome, but the distinction between files stored in Collage and those stored in the local file system (such as a networked disk drive) must be understood clearly before a discussion of this records management project can truly begin.

## SIM Website Description

### *Purpose*

The website of the School of Information Management serves as the public face of the school, and is the most accessible source of information for prospective, current, and former students as well as for others who may have an interest in the school for any number of reasons. Since the website has to meet the information needs of such a wide and varied group, there is a quite a large quantity of information to be displayed. This causes some challenges in terms of organization, as well as the normal challenges involved in designing a public-access information source.

Since the school specializes in information management, with courses in website construction and human-computer interaction, the school's own website has to be clear and well organized, as well as easy to navigate and aesthetically appealing. These considerations were, at one time, considered to be less important than the content provided, but current best practices would indicate that content which is difficult to find, or unappealing when displayed, cannot be considered an asset.

### *Main sections*

We used the current website structure as implemented in Collage to determine the major series we would use to develop our own local filing system. These sections are included for reference in Appendix A, which also shows major sub-sections.

"About SIM" contains pages relating to the school itself, including topics such as history, accreditation and governance. The "Admissions" section deals with information for prospective students, such as application forms, fees, and submission deadlines.

"Programmes" describes the different focus options open to students at SIM, some of

which are dual degrees and involve other faculties. “Courses” has descriptions of the various courses offered, as well as a class schedule and information about grading and ethical guidelines. “People and Groups” offers access to staff and faculty information, student groups and associations, a resource page for current students, and alumni information. “Continuing Education” deals with online courses, public lectures, workshops, and other opportunities. “Research and Publications” leads to information about faculty and student research, as well as current and past publications of the school itself. “Employment and LIS Resources” is mainly a section of links to external resources in the field. “News Releases” and “Site Map and Index” are more or less self-explanatory. Finally, “Contact” has contact information for the school itself, as well as for the Director, the Programme Coordinator, and for the administrative staff.

### Staff, Students and Faculty Involved

The content of the website is produced by a large group of people, including the staff and faculty of SIM, student groups, and occasionally other departments of the University (such as news releases from Public Relations). These groups, and their individual contributions to the content of the website, are described below.

#### *Programme Coordinator*

The present Programme Coordinator, JoAnn Watson, is the staff member who is directly responsible for the school’s website. She is partially responsible, along with the school’s Director, for hiring the Communications Assistant, and for passing along any changes in content to that assistant. The Programme Coordinator should serve as a conduit between the university as a whole and the Communications Assistant, as well

as providing some website content, but should not have to actually deal with the administration of the website.

### *Communications Assistant*

Each year, a student is hired as Communications Assistant. This student is responsible for making the actual changes to the website, via Collage. As content updates are passed on from the Programme Coordinator, this student acts as webmaster, handling all hands-on interaction with the CMS.

This method of handling the administration of the website, though logical in terms of offering students the chance to develop website administration skills, and also as a way to keep the Programme Coordinator from being responsible for updating the website, is problematic in at least two ways. To date, as there has been no real records management policy in place, records have not been organized consistently or stored with a view to preservation or retention. Also, since the student is hired from September to April, it is unclear who is responsible for updating the website over the summer. Arguably, this is problematic, as the most important changes take place during the summer when course schedules and syllabi are updated and changed.

### *Professors*

Professors, as a group, make a significant contribution to one of the most important sections of the website. Course descriptions and syllabi provide crucial information for prospective and current students, as well as potentially important records of the development of courses, and the school as a whole, over time. These descriptions and syllabi are typically complete at the start of each term, though changes

have been known to occur after this point in time, and are normally distributed in PDF format to insure that they are accessible to everyone.

Course descriptions, syllabi, and all other changes to the website content should be forwarded to the Programme Coordinator, who passes them on to the Communications Assistant for addition to the website.

### *Student contributions*

There are two student publications, the Dalhousie Journal of Information Management (DJIM) and Prospectus which are hosted outside of the SIM hierarchy. Several student groups contribute to the website as well, including the School of Information Management Student's Association (SIMSA), and the student chapters of the Canadian Library Association (CLA) and the Special Libraries Association (SLA). These student group websites will, as of April 2006, be hosted on the Dalhousie Student Union server as opposed to the SIM server. This hosting change is being made in order to preserve some of the creative freedom which is available in locally developed websites, and is lost when administering the websites through a CMS.

This provides another grey area in terms of records management. It is clear that SIM need not keep records of every part of the Dalhousie website which is linked from SIM (as that would eventually include the whole internet, depending on how deep you wanted to follow the links). The DJIM, Prospectus, SIMSA, CLA and SLA sections, however, are produced by students within SIM, and therefore could be considered a product of the school. In this sense, then, losing these sections of the website would be a loss to SIM in particular, as well as to the University as a whole. This would seem to indicate that these sections of the website, though not hosted by SIM, should be part of

the SIM website archive. Methods to accomplish this will be discussed in the retention and filing sections below.

### *Dalhousie (Public Relations)*

Finally, news releases and other content are occasionally sent to the Programme Coordinator for inclusion on the SIM website. These are not, strictly speaking, records of SIM, but must be included in the website archive as they certainly are part of the website. After being vetted by the Programme Coordinator, this content is forwarded to the Communications Assistant.

### Types of Content

Now that we have some idea who is producing the content, and the stages this content passes through before being included in the publicly accessible version of the website, we can begin to define the different types of content, or records types, contained in Collage.

### *HTML content*

First of all, and most importantly, there is the HTML content of each webpage. The bulk of the Collage content files are in this format. Strictly speaking, this content may be XHTML, XML, PHP, or a combination of all three once it passes through Collage, but describing it as HTML will serve our present purposes most clearly. As discussed above, this HTML content cannot stand on its own and must first pass through the CMS to obtain the necessary styling and hierarchy information. These HTML files do include a great deal of content, however, as well as some of the links to other content types provided by the website. All of the “regular text” on each page, as

well as the links within the body of each page (though not the links in the navigation bar) are defined within the HTML content.

As well as text and links, the HTML content defines headings, paragraphs, lists, and all the other elements which organize the content of a webpage. As mentioned above, however, the HTML will not define how a particular element is displayed. These styling or presentational elements are managed by the CMS.

### *PDF content*

As mentioned above, some of the most important content of the website is stored in PDF format. The most obvious examples are application forms, many publications, and course syllabi, though there are other examples. Each of these files has to be linked within Collage, but is otherwise independent from the HTML content. Currently, PDF files have their own folder within Collage.

### *Graphical content*

Graphics, like PDF files, have to be linked from Collage, but are not otherwise affected by changes to the HTML. These files would include photos and any decorative elements added to the website. Again, graphics have their own folder in the CMS.

### *Multimedia content*

Strictly speaking, of course, most website pages could be described as multimedia, since they often include text as well as graphics. For the purposes of this portfolio, however, we will define multimedia as audio or video files. This type of content (which is very minimal at the present time) is stored along with the PDFs.

## *Databases*

It must be recognized that Collage is, in itself, a database providing a specific level of functionality. This includes hosting HTML, PDF, graphical and multimedia files, but does not include hosting other databases. Additional databases provide more of a challenge than simple HTML or PDF files in terms of records management. In the first place, they are not hosted by Collage, so they are outside the most obvious collection of documents. Secondly, databases often have their own external content (such as graphical files indexed in the database).

At the same time, external databases can provide access to some crucial content, as does the tapes and lectures collection, our only current external database. The issues here are similar to those discussed in the section on Student Groups, and the conclusion is similar as well. As losing the content of these databases would be a significant loss for the website and for the school as a whole, these databases and their content should be included in the records management policy of the SIM website. Though they will not be hosted by SIM, they should be archived along with the rest of the website.

## Pre-project Assessment

Before beginning any actual interaction with the records themselves, we established a framework for what we planned to do, and the records we thought we would encounter.

### *Active files*

Obviously, there are a large number of active files, reflected in the content on the current SIM website itself. First of all, we wanted to inventory these files, and get a concrete idea of the number of active files, file formats, and present naming and filing conventions (if any). We began this by scanning methodically through the website records in Collage, in order to get a complete grasp on the different sections and what was contained in each, as well as some idea of how each section related to the others. The existing top-level menu items helped us to determine our major records series.

### *Inactive files*

Before even looking at Collage, we suspected that there would be a considerable number of inactive files which had been part of previous incarnations of the SIM website, but were not part of the current edition. Also, although it is outside the scope of the specific inventory we had planned to do, the whole (former) SLIS website is also an important (if inactive) series which would have to be archived carefully.

## Inventory

### General Inventory Goals

We planned to do a comprehensive inventory in order to better define which files were active and inactive, as well as finding out how many different series and files were in each category. As discussed above, the Collage content is the only record of each file, so there were no local records to account for. Evaluating the status of the current records in Collage, which specifically does not include the former SLIS website or other

external portions of the current SIM website, would allow us to make the best possible recommendations.

### Strategy

Since Collage allows a listing of all content files, our inventory began with printing off this list, and browsing through the website and Collage to check the individual files to determine which were active (linked from an active webpage) and which were inactive (not linked, or linked from another page which was itself inactive). Given the nature of these records, inventorying at the series level would not have provided us with enough information, so performing a file-level inventory was required.

### Survey Instrument

Our survey instrument was an Excel spreadsheet, designed to allow us to quickly determine the status of a record (in terms of its activity level), as well as classifying the record by type. The instrument recorded status and file types, as well as the breakdowns and descriptions of series and sub-series. For this type of inventory, we determined that extra details such as file size and dates would be more time consuming to collect than they would be helpful. We have included both a blank survey form (Appendix B), and the complete inventory for Spring 2006 (Appendix C).

### Inventory Results

Collage Records	Active Files	Inactive Files	HTML/XML	PDF	Graphic	Multi-media
Total	435	48	329	86	66	1

### Inventory Summary

Overall, inactive files accounted for about 10% of the total files stored in Collage. This is certainly a problem, and has resulted from the lack of a records management policy for the website to date. The lack of a copy of the records in the local filing system is a much more serious problem. These missing records constitute a real danger in terms of the ability to replace the website as a whole in case of catastrophic data loss. When these policies are implemented, creating local copies of all the Collage records will be a real priority.

## Retention Policies

### General Retention Goals

Generally speaking, the retention policy we are advocating will result in all of the content of the website, including content which is replaced over time, being saved in perpetuity. Since the storage media being used have no practical limitations in terms of storage space, and since inactive files can be compressed and segregated neatly from active files, there is no incentive to destroy records.

### Identifying Vital, Active and Inactive Records

Since the SIM website has great historical value, as well as administrative value in terms of content, the entire website can be considered a vital record. Some of the individual records will be active, and others inactive, but they should all be considered vital. It should be noted as well that the published copy of the website, as filtered through Collage, is the official record.

Active files are those which are currently a part of the publicly available SIM website. This includes the HTML content, as well as PDFs, graphics, and multimedia files. At present, these files are only stored within Collage, with no local file system copies. This is unacceptable, and will have to change if these policies are implemented. Ideally, there should be a complete record of the content of the SIM website in a folder on the local networked drive. These files will be edited and changed first, before any changes are made in Collage.

Inactive files are those which were once a part of the website, but are not part of the published website any longer. This includes, first of all, the former SLIS website in its entirety, as well as any content which has been a part of the SIM website but has since been superseded. These inactive files will be stored in an Archives folder on the local networked drive, where they will eventually be compressed and permanently archived.

### Backups (of Active Files)

We mentioned earlier that a distinction would be made, for the purposes of this portfolio, between backups and archives. The distinction is as follows: Backups are copies of active records, whereas archives are copies of inactive records. The easiest way to produce consistent backups is to have a mirror of all of the active files, in a different location. Since the CMS content is the “live” version of the website, a copy of that content in the local filing system would be a valid backup of that data. As will be discussed below, University Computing and Information Services (UCIS) creates yet another copy of this data for safety purposes.

It is very important that all active files be recognized as such. The HTML content is obviously included as active files, but so are the PDFs, graphics, and multimedia files (such as audio or video content). It should be possible to restore the website to its fully functional and up-to-date form from the active files alone in case of a catastrophic loss of data, though obviously one would hope never to have to do this. At the same time, however, the active files will only allow restoration of the website via the CMS. They would not be enough to completely rebuild the website as a stand-alone product.

The records on the local networked drive would also not include any external files, such as databases or the Student Association sections, once these are moved to the DSU. These sections will be discussed along with the archives, below.

### *Collage*

University Computer and Information Services makes a complete copy of the entire Dalhousie website every day, allowing it to be re-published in its full form in the event of a catastrophic loss of data.

### *Local file system storage (intranet)*

UCIS also stores the content of the local networked drives. Since the local networked drives, like the Collage content, are already being backed up, we should consider that to be a reliable storage medium. Any event which caused a loss of these local files would also destroy all of the data on the local intranet, and this is exactly the type of thing UCIS works hard to prevent. So, in effect, we would have a constant backup of our own backup of the Collage content.

### *External media*

Given the two levels of replication already provided by UCIS, external media backups of the active files are probably not necessary. Given the low cost of optical media, however, we recommend that a mid-year backup (at the beginning of the winter term) be made on DVD. These copies could be destroyed once the next archive is created, if storage space becomes a concern.

### Archives (of Inactive Files)

Archiving, then, is for inactive files, and involves creating a compressed copy of the content, which can be stored on the local networked drive. Where the active files must allow the re-publishing of the complete website in Collage, the archives must be complete enough to allow the website to be re-published without Collage, should the need arise. This would require, first of all, a Communications Assistant with some web coding skill, such as the ability to write their own Cascading Style Sheets, and preferably with some database integration and web scripting skills as well. A talented Communications Assistant would not be enough, however, if the archives did not contain files which clearly represent the “look and feel” of the website.

Archives would also have to include relevant external content, such as databases which are part of the content of the SIM website. This would include the tapes and lectures database and any external files upon which it depends (if any). Over time, other databases may be added to the SIM website either by the school itself, or by student groups. As mentioned earlier, this content may be hosted outside of SIM (such as by the Student Union), but should still be included in the archives if at all possible, so that each archive represents as completely as possible all content that relates directly to

SIM. External databases, and other content created by student groups affiliated with SIM, would have to be sent to SIM once each year, in preparation for the annual archive. This should not pose too much of a problem if the goals of this records policy are explained to the people involved with managing this external content. It is important to recognize that although these student groups are not responsible to SIM, and will be dealing with their own records management and archiving concerns, we still recommend that this external content be included in the annual SIM archives if at all possible.

#### *Local file system storage (intranet)*

The archives folder in the local filing system will contain a compressed copy of the complete content of the website at the beginning of each school year. This includes the HTML content, PDFs, graphics, other multimedia files, databases, and any other external content produced by students affiliated with SIM. Archive creation will be somewhat time-consuming, especially as the complete content must be gathered both from the active file folders and from outside the local filing system, but we would still strongly suggest creating a full archive shortly before the beginning of each school year.

We also strongly suggest using an offline browsing program, such as WinHTTrack, to 'rip' the whole website, rather than attempting to use screen captures to archive the "look and feel" aspects of the website. This 'rip' would produce a fully functional copy of the website as it is produced by Collage for a web browser, which could be compressed and copied onto a DVD. This backup would include graphics, stylistic and presentational elements, and multimedia files, but would not include database functionality or other external content. The only drawback to this approach,

aside from the loss of interactivity, is that this form of archive would take up just as much space as our recommended source file archive. The strength of this type of backup is that it creates a fully browseable copy of the website which does not rely on Collage at all. For reference purposes, this would definitely be the backup method of choice.

Since this offline copy of the website contains all of the style and presentational elements of the original, it answers all of the concerns with preserving the “look and feel” of the website at a particular point in time. We created an offline copy of the current SIM website for testing purposes, and the website was replicated perfectly (database content aside), in an archive that was about 10MB in size.

Another important task upon implementation of this set of policies will be to create a complete archive of the SLIS website. It is currently stored outside the local intranet, and is thus outside the UCIS backup protection described above. This version of the website is both important and irreplaceable, and should be included in the recommended archive section described above as soon as possible. There is no need to create an offline copy (a ‘rip’) of this version of the website, as it was not published through Collage, and it is fully functional on its own.

### *External media*

These archives should also be copied onto a portable medium, such as a DVD (which would be preferred to CD as it is somewhat more reliable), for medium-term storage. Over the long term, of course, DVDs cannot be considered reliable, though new technologies are appearing constantly and some other medium may soon be a valid long-term storage choice.

## Filing System

### General Filing System Goals

The main goals of any filing system are to store records safely, and to make record retrieval and administration as easy as possible. This is best accomplished by having “a place for everything and everything in its place” as the saying would have it. Once we completed our inventory, we had a very good idea what “everything” consisted of. This made it possible to create a filing system which would store all of the files associated with the website, while making them as easy as possible to retrieve and manage.

This filing system would be located on the local networked disk drive, which is accessible by staff and faculty only. This drive falls under the UCIS backup system described above, and can be considered a reliable storage medium.

### Organizing Files

#### *Parallel organization*

Broadly speaking, the simplest basis for a filing system was for the local HTML files and folders to match the structure of the website itself, including a “root” folder, and folders for each section of the website, which would be treated as individual series, each with their own sub-series where applicable. In this way, the files and folders could be “browsed” in much the same way as the website itself. This form of organization would also make it easy to insert new files into the system without having to make and complex deliberations about where they should go.

The biggest complication with this arrangement is that the current Collage website folder layout includes many more levels of subfolders than would be ideal. We have limited the local filing system to two levels below the root, which should be more than enough to allow differentiation of the different sections and their sub-sections. Folders for individual years, for example, are inefficient when all files are dated; abstracts of lectures should be with the lectures themselves, not in a subfolder. Eventually, the files stored on Collage should also be grouped in this way, but organizing the local filing system would be an excellent first step.

A graphical representation of the first and second levels of folders and subfolders in this local system is included in Appendix D.

### *Sections not hosted by SIM*

Databases and externally-hosted sections of the website are exceptions to this “a place for everything” concept, as they are not, strictly speaking, part of the locally-hosted CMS-driven website. As it will not be possible to track the status of these sections (in terms of their activity or inactivity), and as these sections will not be accessible through the local file system in any case, they will not be considered part of the “active files” section at all. Instead, the content of these sections will be gathered together as a part of each full archive set (at the beginning of each school year), and stored as part of the archives described below.

### *Archive storage*

Archives will be the last of the “root” level folders. Within this main records series, the intent is to have only compressed archive files of each school year preceding the current one, saved in perpetuity for the reasons explained above. The files for the

current school year will not be compressed until the year is complete and all external files have been added. So, there will be one folder beneath the archives folder each school year, containing the archived content for that year. As active files are superseded, they will be moved into the appropriate location within the archive folder, which will replicate the folder hierarchy of the current website.

In order to make this easier, a copy of the (empty) folder hierarchy could also be stored here (in a compressed format), so that it could be decompressed to provide a structure for each school year's files. This folder archive would have to be updated if the folder structure of the website (and the active files) changed, but it would still save a lot of time over creating a new hierarchy.

### Naming Conventions

The second requirement was for an established set of file naming conventions. We decided that in for each HTML content record, each filename should reflect the record's place in the series hierarchy described above, the date it was created (or modified) in standard ISO YYYY-MM-DD format, its author (last name, first name) or source if appropriate, and a brief title or description. Though each HTML file will be in a folder set aside for its series, the series or sub-series (if any) should still be included in the filename. The date follows, which will allow the files to be sorted by date in either ascending or descending order, depending on the goals of the searcher. The author and title, then, should allow the Communications Assistant to recognize the content of the file without having to open it, at least in most cases. Files from different sections should all be named consistently, which will save a lot of time, as well as making archive creation much easier.

A similar policy would apply to PDFs, graphics, and other multimedia files. The filenames will consist of the series (website section), followed by the date, and then a description of the file content. This description should be concise, but the priority should be to include a meaningful description, rather than a short one (which is different from the focus when attempting to fit the file name onto the tab of a paper folder, for instance). There is no need, then, to limit the length to one or two words, though many file systems limit filenames to 256 characters. Needless to say, this length should be avoided, and the combination of section, date, and name should be able to provide a meaningful representation of the content.

Databases and their dependant files will not follow these naming conventions, as they are produced outside of SIM. Since they are stored only in a separate area within the archives, and are not part of the active file collection, this should not cause any concern.

Naming Conventions are described, with examples, in Appendix E.

### Inserting New Files into the System

It is very important that there be a strict policy regulating access to Collage. Only the current Communications Assistant, as well as the Programme Director, should be able to create or alter the content of the website. The only way to sustain these records policies, once they are implemented, is to have control over who has access to the records. In part, the current problems with both the local records and the Collage content are due to having too many people with access. Website content should be submitted to the Programme Coordinator, who will check it and then pass it on to the

Communications Assistant, who should be the only one to deal with the local records and with Collage.

At present, there is no policy dealing with new records, which are created directly in Collage, leaving no file copy in the local system. Because of this method, there is no local filing system to reflect the content of the website. Developing a local copy of all Collage content is an important first step, but this can only be accomplished through having a consistent file format in which to store that content.

### *The use of templates*

We began by creating a template which would be used to regulate the storage of HTML content in the local filing system. As mentioned earlier, the Communications Assistant cannot view the local HTML content without running it through the CMS, which provides the necessary styling and display information. This is true, but this obstacle can be overcome by providing an HTML “wrapper” for the content of each local file. This “wrapper” template would allow the content to be opened in any web browser, and would also include metadata tags and helpful templates for different types of HTML content.

Using this template, individual HTML files in the local filing system could contain any textual content in its final (“marked up”) format, as well as references to linked files, hyperlinks to other web pages, and graphics or multimedia files (all of which will need to be added manually in Collage, but must be recorded in the local file as well). These files could, as mentioned above, be opened in any web browser. The file links, hyperlinks and graphics would not be functional, but they would be both visible and meaningful. Stylistic and presentational aspects, including page layout and site navigation, will also

be lacking from these files. Even with these limitations, however, the template and the HTML content together form a viable storage format for what had been, until now, a non-existent series of records.

When new content is to be added to Collage, then, the Communications Assistant would copy this content directly from the template and replace link and graphic tags with their appropriate equivalents in Collage. The final result would be meaningfully (though not exactly) represented in the local filing system, and the published content could be reproduced easily if needed. These local files would, of course, be named according to the naming conventions described above, making them easy to sort and search effectively.

The HTML template is included in Appendix F, along with a templated new file in Appendix G.

#### *Updates and corrections*

Minor changes are a continuing part of website administration. In our proposed filing system, these changes would be made on the local file (within the template), and only then implemented in Collage. In this way, the local file will always reflect the current content of the website, and changes can be verified by viewing the file in a browser before inserting it into Collage.

Any changes to a local file require that a new copy of the file be saved, named according to the conventions above, and the old copy moved to the archive folder for eventual compression and storage. The only exception to this requirement would be if the file was just inserted into Collage and an error was noticed immediately. Any

changes done the same day should not produce a new file (as the dates would result in an identical filename in any case).

### *Major changes*

Major changes would include alterations of the hierarchy of the website, through addition or deletion of content, or merely through content being moved within the website. These changes are defined as major because they will also alter the folder hierarchy of the local filing system. It is crucial, in fact, that these changes be made concurrently, with the local filing system being changed first and the Collage content being altered to match. In this way, changes can be made consistently and comprehensively without having to spend a lot of time verifying the location of local files.

### Summary

Our initial goals were to carry out a comprehensive inventory, then to develop a set of retention policies and a filing system which would allow for the preservation of the SIM website in each of its iterations.

The policies described above, and listed together in Appendix H, will allow for content to be added to the local filing system with a minimum of effort, while still preserving the content of the website in the local filing system. Our concerns with preserving the styling and presentation of the website are detailed above, and overcoming these concerns will certainly require some extra effort, but the archive format and methodology we have recommended will allow the website to be archived as comprehensively as possible.

Several areas will require immediate action, if these policies are to be adopted. First, the complete SLIS website must be archived in a safe location. Secondly, content files in the local filing system, and those which are included in Collage but are not represented in the local system, must be adapted to the template format, folder hierarchy, and naming conventions we have recommended. These initial stages will be time consuming, but once the system is in place, it should be easy to maintain, and will save a great deal of time, effort, and distress in the long term. These recommendations, as well as some other more detailed ones, are included in Appendix I.

## Appendices

- A) Alphabetical Content Hierarchy (page 30)
- B) Sample Inventory Form (page 31)
- C) Sample Completed Inventory Form (page 32)
- D) Proposed SIM Website and Local File System Graphical Overview (page 51)
- E) Proposed Naming Conventions Chart (page 52)
- F) Proposed HTML Content Template (page 53)
- G) Sample Completed HTML Content File (page 54)
- H) Proposed Filing Policy Guidelines (page 55)
- I) Specific Implementation Recommendations (page 56)

1) About SIMAccreditation

Accreditation visit: 20-23 October  
2005

Welcome to the external review  
panel

Facilities

Goals and objectives

Governance

History

2) Admissions

Admissions requirements

Application deadlines

Application forms

Registrar

Fees

Financial assistance

Information for prospective students

A message from the director

Are there any scholarships?

How do I apply?

Send me information!

What are the deadlines?

What do I need to get in?

What is an MLIS and why should I  
do it at SIM?

Where are our graduates?

Who are our students?

Request for information

Submission of application and  
documentation

3) Contact4) Continuing education

Custom training

Online modules

Public lectures

2005-2006

2004-2005

2003-2004

2002-2003

2001-2002

2000-2001

1999-2000

1998-1999

Lecture tapes database

Research

Workshops

2005-2006

2004-2005

2003-2004

# SIM Website Alphabetical Content Hierarchy (Spring 2006)

5) Courses

Courses offered

Elective courses

Required courses

Reading courses

Thesis option

Areas of concentration

Courses outside SIM

Class schedule

Grading system

Ethical guidelines

6) Employment and LIS resources

Career resources

Employment links

Job hunting skills

LIS resources

7) News releases8) People and groups

Associated alumni

Current students

Canadian Library Association (CLA)

Faculty and staff

Special Libraries Association (SLA)

Students' association (SIMSA)

9) Programmes

Bachelor of management

Interdisciplinary Ph.D.

MLIS programme

MLIS/LLB programme

MLIS/MBA programme

MLIS/MPA programme

10) Research and publications

Publications

Research

11) Site map and index

### Sample Inventory Form

Series Title	Sub-series	Files Names	Active (Live)	File Types	Series description
--------------	------------	-------------	---------------	------------	--------------------

	<b>Series total:</b>	<b>Active/Inactive:</b>	<b>XML:</b>
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Series Title	Sub-series	Files Names	Active (Live)	File Types	Series description
<b>SIM Home</b>	[files outside folders]	index.xml	yes	xml	Brief introduction to the school, links to student information, news, and events.
<b>Series total: 1</b>			<b>Active/ Inactive: 1/0</b>	<b>XML: 1</b>	
<b>About_SIM</b>	[files outside folders]	Accreditation.xml	yes	xml	Contains records about the school's history, accreditation status, goals, objectives, governing bodies, physical facilities, and relationship to other university departments.
		GoalsObjectives.xml	yes		
		History.xml	yes		
		index.xml	yes		
		School_Governance.xml	yes		
	<b>SIM's_Context_at_Dalhousie</b>	index.xml	yes		
<b>Series total: 6</b>			<b>Active/ Inactive: 6/0</b>	<b>XML: 6</b>	

Admissions	[files outside folders]	Admission_Requiremen.xml	yes	xml	Contains information for prospective students including application procedures, admission requirements, deadlines, forms, fee schedules, and financial assistance and scholarship information.
		Application_Deadline.xml	yes		
		Application_Forms.xml	yes		
		Fees.xml	yes		
		Financial_Assistance.xml	yes		
		index.xml	yes		
		Request_for_Informat.xml	yes		
		Submission_of_Applic.xml	yes		
	<b>Information_for_Prospective_Students</b>	Aretherescholarships.xml	yes		
		DirectorsMessage.xml	yes		
		Howdolapply.xml	yes		
		index.xml	yes		
		SendInformation.xml	yes		
		WhataretheDeadlines.xml	yes		
		Whatdolneed.xml	yes		
		WhatisanMLIS.xml	yes		
		WhereareourGraduates.xml	yes		
		WhoareourStudents.xml	yes		

**Active/Inactive:**  
**Series total: 18 18/0 XML:18**

Contact	[files outside folders]	index.xml	yes	xml	Contact information for the school.
			<b>Active/ Inactive:</b>	<b>1/0 XML: 1</b>	
<b>Continuing_ Education</b>	[files outside folders]	Custom_Training.xml	yes	xml	Contains records about the school's online module offerings, continuing education research, public lectures, workshops, and custom training.
		index.xml	yes		
		Online_Modules.xml	yes		
		Research.xml	yes		
<b>Public_Lectures</b>		index.xml	yes		
		Lecture_Tapes_Databa.xml	yes		
	<b>1998-1999</b>	index.xml	yes		
	<b>Abstracts</b>	Elizabeth_Davenport.xml	yes		
		Ernie_Boyko.xml	yes		
		Ian_Sinclair.xml	yes		
		index.xml	no		
		James_Lorimer.xml	yes		
		Mary-Liz_Grise.xml	yes		
		Sheila_Latham.xml	yes		
		Students.xml	yes		
		Su_Cleyle.xml	yes		
		William_Maes.xml	yes		
	<b>1999-2000</b>	index.xml	yes		
	<b>Abstracts</b>	Andrew_Large.xml	yes		
		Catherine_Ross.xml	yes		

	index.xml	no
	Judith_Hare.xml	yes
	Louisa_Horne.xml	yes
	McGillis.xml	yes
	Suzanne_Sexty.xml	yes
<b>2000-2001</b>	index.xml	yes
<b>Abstracts</b>	Christine_Marton.xml	yes
	Elaine_Toms.xml	yes
	Haidar_Moukdad.xml	yes
	Ian_Wilson.xml	yes
	index.xml	no
	Jim_Nyce.xml	yes
	Marilyn_Rennick.xml	yes
	Roch_Carrier.xml	yes
	Sharon_Munro.xml	yes
	Teresa_Scassa.xml	yes
	Wendy_Duff.xml	yes
<b>2001-2002</b>	index.xml	yes
<b>Abstracts</b>	index.xml	no
	Ingles.xml	yes
	McClure.xml	yes
	Moosberger.xml	yes
	Penney.xml	yes
	Polidori.xml	yes
	Sedo.xml	yes
<b>2002-2003</b>	index.xml	yes
<b>Abstracts</b>	Brown.xml	yes
	Cunningham.xml	yes
	Duff.xml	yes
	Dumouchel.xml	yes
	index.xml	no
	McKenzie.xml	yes
	Quinlan.xml	yes
	Roberts.xml	yes
	Silver.xml	yes
	Students.xml	yes

	Toms.xml	yes
<b>2003-2004</b>	index.xml	yes
<b>Abstracts</b>	Andrew_Steeves.xml	yes
	DeYoung.xml	yes
	Ellis.xml	yes
	Howarth.xml	yes
	index.xml	no
	Madeleine_Lefebvre.xml	yes
	Richard_Ellis.xml	yes
	Vagianos.xml	yes
<b>2004-2005</b>	index.xml	yes
<b>Abstracts</b>	Carbo.xml	yes
	Dufour.xml	yes
	Roberts.xml	yes
	Symons.xml	yes
	Wilson.xml	yes
<b>2005-2006</b>	index.xml	yes
<b>Abstracts</b>	Blustein.xml	yes
	Clubb.xml	yes
	Finkelstein.xml	yes
	Fox.xml	yes
	index.xml	yes
<b>Workshops</b>	index.xml	yes
	Workshops_2003-2004.xml	yes
	Workshops_2004-2005.xml	yes
	Workshops_2005-2006.xml	yes
<b>Descriptions</b>	Assessing_Needs.xml	yes
	Bringing_Resources.xml	yes
	Cataloguing.xml	yes
	Cataloguing_2.xml	yes
	index.xml	yes
	Intro_FOIPPOP.xml	yes
	Point_of_Order.xml	yes

	<b>Active/ Inactive:</b>	<b>XML:</b>
<b>Series total: 89</b>	<b>83/6</b>	<b>89</b>

<b>Courses</b>	[files outside folders]	Areas_of_Concentrati.xml	yes	xml	Contains descriptions and syllabi of all required and elective course offerings, class schedules, areas of concentration, ethical guidelines, grading system information, other course offerings in the Faculty of Management, and student database project information.
		Class_Schedule.xml	yes		
		Class_Schedule.archi.xml	no		
		Courses_Outside_SIM.xml	yes		
		Ethical_Guidelines.xml	yes		
		Grading_System.xml	yes		
		index.xml	yes		
		Reading_Courses.xml	yes		
		Thesis_Option.xml	yes		
	<b>Courses_Offered</b>	Elective_Courses.xml	yes		
		index.xml	yes		
		LIBS0590.xml	yes		
		LIBS0590_archive.xml	no		
		LIBS5505.xml	yes		
		LIBS6050.xml	yes		
		LIBS6540.xml	yes		
		LIBS6750.xml	no		
		LIBS6830.xml	yes		

		LIBS6840.xml	yes		
		LIBS6850.xml	yes		
		Required_Courses.xml	yes		
		index.xml	no		
		Winter2001.xml	yes		
		Winter2002.xml	yes		
		Winter2003.xml	yes		
			<b>Active/ Inactive:</b>	<b>XML:</b>	
<b>Series total: 25</b>			<b>21/4</b>	<b>25</b>	
<b>Employment_and_LIS_Resources</b>	[files outside folders]	Canadian_LIS_Program.xml	yes	xml	Contains external links to Canadian LIS programmes, local listservs, career, job search, and LIS resources.
		Career_Resources.xml	yes		
		Employment_Links.xml	yes		
		index.xml	yes		
		Job_Hunting_Skills.xml	yes		
		LIS_Resources.xml	yes		
		Local_Listservs.xml	yes		
			<b>Active/ Inactive:</b>	<b>XML:</b>	
<b>Series total: 7</b>			<b>7/0</b>	<b>7</b>	
<b>Files [not menu visible]</b>	[files outside folders]	5500.pdf	yes	pdf	Contains course syllabi, course lists, schedules, forms, minutes, newsletters, other official documents, and multimedia records.

5515.pdf	yes	wmv
5520.pdf	no	
5530.pdf	yes	
5570.pdf	no	
5590.pdf	yes	
6150.pdf	yes	
6250.pdf	yes	
6300.pdf	yes	
6310.pdf	yes	
6320.pdf	yes	
63302.pdf	yes	
63501.pdf	yes	
63701.pdf	yes	
64501.pdf	yes	
6500.pdf	no	
6560.pdf	yes	
6590.pdf	yes	
6600.pdf	yes	
66101.pdf	no	
6620.pdf	yes	
6640.pdf	yes	
6800.pdf	yes	
68101.pdf	yes	
6850.pdf	yes	
ips.pdf	yes	
LIBS5520-W2006.pdf	yes	
libs6500-_w2006rev.pdf	yes	
LIBS6610-W2006_rev.pdf	yes	
LIBS_5570-_w2006.pdf	yes	
libs_6750-_W2006.pdf	no	
LIBS_6750-_W2006_rev_.pdf	yes	
MgmtCourses.pdf	no	
Orientation_Schedule_01sep051.pdf	yes	
reading_course_proposal.pdf	yes	

	SIM_Exemption_Request_form_2005.pdf	no
	SIM_Practicum_Application-Form_A_2005.pdf	yes
	SIM_Practicum_Application-Form_B_2005.pdf	yes
	sim_practicum_application_form_2005.pdf	no
	sim_practicum_exemption_request_form_2005.pdf	no
	SIM_Practicum_Supervisor_Report_form_2005-Rev.pdf	yes
	sim_practicum_supervisor_report_form_2005.pdf	no
<b>Alumni</b>	aa_fall_reception_2005.pdf	no
	alumni_2004minutes.pdf	yes
	alumni_2005nominations.pdf	yes
	alumni_Budget05-06.pdf	yes
	alumni_constitution_rev05.pdf	yes
	alumni_MinutesMarch26_04.pdf	yes
	alumni_MinutesSept2_03.pdf	yes
	alumni_oaa_guidelines_rev05.pdf	no
	Outstanding_Alumni_Award-Feb06.pdf	no
	outstanding_alumni_award-Feb06rev.pdf	yes
	Outstanding_Alumni_Award_Guidelines-_20Dec05.pdf	yes
<b>CLA</b>	cla_pp_professionals.pdf	yes
	cla_pp_students.pdf	yes
<b>Current_Students</b>	[empty]	n/a
<b>FionaBlack</b>	black_1chapa4new.PDF	yes
	black_2chapa4new.PDF	yes
	black_3chapa4new.PDF	yes
	black_4chapa4new.PDF	yes

	black_5chapa4new.PDF	yes
	black_6chapa4new.PDF	yes
	black_abstracta4new.PDF	yes
	black_appenda4new.PDF	yes
	black_dissabsa4new.PDF	yes
	black_dissacka4new.PDF	yes
	black_dissbiba4new3.PDF	yes
	black_dissgeoa4new.PDF	yes
	black_disstita4new.PDF	yes
	black_ToCandMaps.pdf	yes
	IFLAreport.pdf	yes
<b>Governance</b>	apt_termsofreference.pdf	yes
	P_GTermsofReference.pdf	yes
	sim_as_termsofreference.pdf	yes
	sim_bylaws.pdf	yes
	sim_cce_guidelines.pdf	no
	sim_cce_termsofreference__	
	rev0405.pdf	yes
<b>Inform</b>	inform2002.pdf	yes
	inform2003.pdf	yes
	inform2004.pdf	yes
	news1999a.pdf	yes
	news2000.pdf	yes
	news2001.pdf	yes
<b>SIMSA</b>	SIMguide05.pdf	yes
	SIMSAorientation.pdf	no
<b>SLA</b>	[empty]	n/a
<b>Video</b>	Norman.wmv	yes
<b>YA_Hotline</b>	hottest_info.pdf	yes
	hottest_order_form.pdf	yes

<b>Series total: 87</b>	<b>Active/ Inactive: 72/15</b>	<b>PDF: 86 WMV: 1</b>
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<b>Images [not menu visible]</b>	[files outside folders]	brown.gif	no	gif	Contains design images and images of people including alumni, students, faculty, and visitors.
		fullsyllabus.gif	yes	jpg	
		green.gif	no		
		homepg_title.gif	no		
		opapers.gif	yes		
		pdf.gif	yes		
		SIM_maintitle.gif	no		
		top.gif	yes		
		adamsbirdsall.jpg	yes		
		certificate.jpg	yes		
		classof2005.jpg	no		
		frontpage3.jpg	yes		
		hottest_cover.jpg	yes		
		kenrowe.jpg	yes		
		M_Lefebvre.JPG	yes		
		prospbw.jpg	yes		
		reading.jpg	yes		
		seamus.jpg	yes		
		title_sim.jpg	yes		
		whatsnew.jpg	no		
		whatsnewphoto.jpg	yes		
	<b>Alumni</b>	dwyer_th.jpg	yes		
		mary_virtue.jpg	yes		
		paon_th.jpg	yes		
		sanderson_th.jpg	yes		
		saunders05.jpg	yes		
	<b>CLA</b>	logo.gif	no		
		maycopy.gif	yes		
		new.gif	yes		

	top.gif	yes
	welcome.gif	yes
<b>Current_Students</b>	radiobutton.gif	yes
	mydal.jpg	yes
	stuffit1.jpg	no
	stuffit2.jpg	no
	stuffit3.jpg	no
	stuffit4.jpg	no
<b>Faculty</b>	black.04.jpg	yes
	dykstra.JPG	yes
	fionablack.jpg	yes
	hmoukdad.jpg	yes
	horrocks.jpg	yes
	howard.JPG	yes
	keithlawson.jpg	yes
	macdonald.jpg	yes
	spiteri.jpg	yes
	Toze2.jpg	yes
<b>people_photos</b>	abrams.jpg	yes
	alumniaward.jpg	yes
	barbara_clubb.jpg	yes
	classof2005.jpg	no
	DavidFinkelstein.jpg	yes
	deyoung.jpg	yes
	Jim_Matarazzo.jpg	yes
	Lynne_McKechnie.jpg	yes
	MJweeding.jpg	yes
	newman.jpg	yes
	Phil_Mulvaney.jpg	yes
	ProspectusTeam.jpg	yes
	shirley-elliott.jpg	yes
	Showcase.jpg	yes
	Sonia_Poulin.jpg	yes
	Vivienne_Monty.jpg	yes
	wilson.jpg	yes
<b>SIMSA</b>	SIMSA1.jpg	yes

<b>SLA</b>	slasim_logo.gif	yes		
	top.gif	no		
		<b>Active/ Inactive:</b>		
		<b>Series total: 67</b>	<b>54/13</b>	<b>GIF: 16</b>
				<b>JPG: 51</b>

<b>News_ Releases</b>	[files outside folders]	2000August.xml	yes	xml	Contains the school's official news releases.
		2000July-1.xml	yes		
		2000July-2.xml	yes		
		2000July-3.xml	yes		
		2000July-4.xml	yes		
		2000July-5.xml	yes		
		2000July-6.xml	yes		
		2000November-1.xml	yes		
		2000November-2.xml	yes		
		2001April-2.xml	yes		
		2001April-21.xml	yes		
		2001August.xml	yes		
		2001February.xml	yes		
		2001June.xml	yes		
		2001March-1.xml	yes		
		2001March-2.xml	yes		
		2001March-3.xml	yes		
		2001March-4.xml	yes		
		2002April.xml	yes		
		2002February-1.xml	yes		
		2002February-2.xml	yes		
		2002June.xml	yes		
		2002October-1.xml	yes		
		2002October-2.xml	yes		
		2002September-1.xml	yes		
		2002September-2.xml	yes		

2003January-1.xml	yes
2003January-2.xml	yes
2003July-1.xml	yes
2003July-2.xml	yes
2003November-1.xml	yes
2003November-2.xml	yes
2003October.xml	yes
2004February-2.xml	yes
2004July-1.xml	yes
2004July-2.xml	yes
2004June.xml	yes
2004March-1.xml	yes
2004October-1.xml	yes
2004October-2.xml	yes
2004September.xml	yes
2005December-1.xml	yes
2005December-1.xml	yes
2005May-3.xml	yes
2005May-4.xml	yes
2005October-1.xml	yes
2005September-1.xml	yes
2006February-1.xml	yes
2006February-2.xml	yes
2006February-3.xml	yes
index.xml	yes

		<b>Series total: 51</b>	<b>Active/ Inactive: 51/0</b>	<b>XML: 51</b>
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<b>People_and_Groups</b>	[files outside folders]	index.xml	yes	xml	Contains records relating to alumni, faculty, student associations, and resources for current students.
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<b>Associated_Alumni</b>	Alumni_News_Update.xml	yes
	DalSIM-Grad_Mailing_.xml	yes
	Executive_and_Alumni.xml	yes
	index.xml	yes
<b>CLA-SIM</b>	CLA_Information.xml	yes
	Contact_Us.xml	yes
	index.xml	yes
	Professional_Partner.xml	yes
<b>Current_Students</b>	Upcoming_Events.xml	yes
	Graduation_Prizes.xml	yes
	index.xml	yes
	index_archive.xml	no
	Tips_-_Stuffit.xml	no
	Travel_Awards.xml	yes
<b><i>Ethical_Approval_for_Research</i></b>	Application_Forms.xml	yes
	Guidelines.xml	yes
	index.xml	yes
	Procedures.xml	yes
<b>Faculty_and_Staff</b>	Bertrum_MacDonald.xml	yes
	Fiona_A._Black.xml	yes
	Haidar_Moukdad.xml	yes
	index.xml	yes
	Keith_Lawson.xml	yes
	Louise_Spiteri.xml	yes
	Mary_Dykstra_Lynch.xml	yes
	Norman_Horrocks.xml	yes
	Sandra_Toze.xml	yes
	Vivian_Howard.xml	yes
<b><i>Black_Dissertation</i></b> <b>SIMSA</b>	index.xml	yes
	About_SIMSA.xml	yes
	BBDescriptions.xml	yes
	BBSpeakerArchive.xml	yes
	Brown_Bag_Lunch_Seri.xml	yes
	Constitution.xml	yes
	Contact_Us.xml	yes

	index.xml	yes
<b>Calendar_of_Events</b>	December_2005.xml	yes
	February_2006.xml	yes
	index.xml	yes
	January_2006.xml	yes
	March_2005.xml	yes
	November_2005.xml	yes
	October_2005.xml	yes
	September_2005.xml	yes
<b>SLA-SIM</b>	Constitution.xml	yes
	Events.xml	yes
	index.xml	yes
	Join_SLA.xml	yes
	Links.xml	yes
	Meetings.xml	yes
	Officers.xml	yes
	Reports.xml	yes
	Tours.xml	yes
<b>Archive</b>	2000-2001.xml	no
	2001-2002.xml	no
	2002-2003.xml	no
	2003-2004.xml	no
	2004-2005.xml	no
	index.xml	yes
<b>Minutes</b>	Feb2-2005.xml	yes
	index.xml	yes
	Nov22-2004.xml	yes
	Oct25-2004.xml	yes
	Sep27-2004.xml	yes

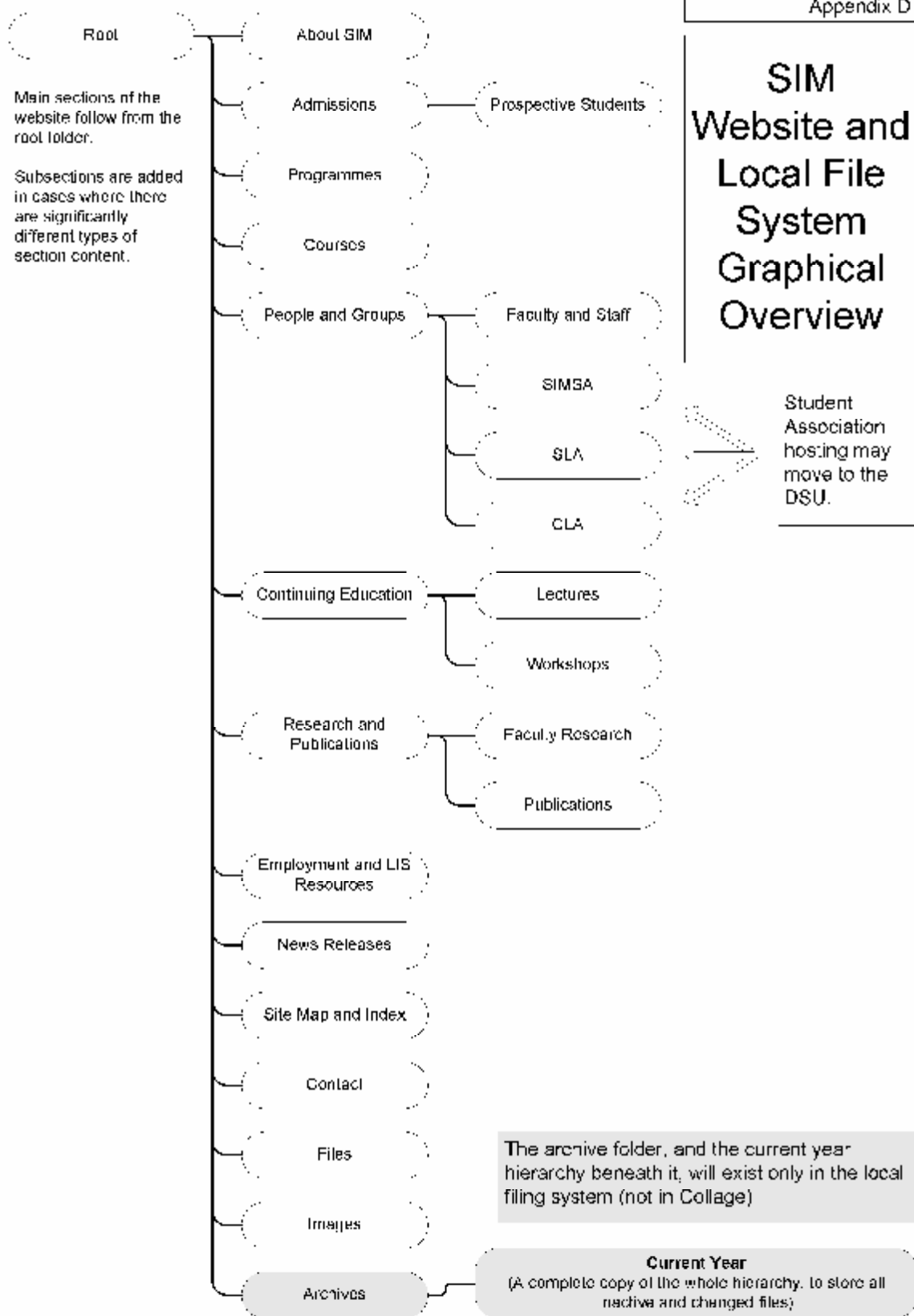
	<b>Active/ Inactive:</b>	<b>XML:</b>
<b>Series total: 65</b>	<b>58/7</b>	<b>65</b>

<b>Programmes</b>	[files outside folders]	Bachelor_of_Manageme.xml	yes	xml	Contains information about the graduate dual degree programmes, undergraduate programme, and interdisciplinary post-graduate programme options.
		index.xml	yes		
		Interdisciplinary_Ph.xml	yes		
		MLIS-LLB_Programme.xml	yes		
		MLIS-MBA_Programme.xml	yes		
		MLIS-MPA_Programme.xml	yes		
		MLIS_Programme.xml	yes		
		Newman.xml	yes		
			<b>Active/Inactive:</b>	<b>8/0</b>	<b>XML: 8</b>
			<b>Series total: 8</b>		
<b>Research_ and_ Publications</b>	[files outside folders]	index.xml	yes	xml	Contains records about student research, faculty research, and official publications.
	<b>Descriptions</b>	index.xml	yes		
		OP_List_of_Titles.xml	yes		
		OP_Order_Form.xml	yes		
		OP_Order_Information.xml	yes		
		OP_Submissions.xml	yes		
		Other_Publications.xml	yes		
		YA_Hotline.xml	yes		
		YA_Hotline_Back_Issu.xml	yes		

	YA_Hotline_Hottest.xml	yes
	YA_Hotline_Publicati.xml	yes
	YA_Hotline_Subscribe.xml	yes
<b>OPAbstracts</b>	index.xml	yes
	OP34.xml	yes
	OP36.xml	yes
	OP38.xml	yes
	OP39.xml	yes
	OP41.xml	yes
	OP42.xml	yes
	OP43.xml	yes
	OP44.xml	yes
	OP45.xml	yes
	OP46.xml	yes
	OP47.xml	yes
	OP48.xml	yes
	OP49.xml	yes
	OP50.xml	yes
	OP51.xml	yes
	OP52.xml	yes
	OP52.xml	yes
	OP53.xml	yes
	OP54.xml	yes
	OP55.xml	yes
	OP56.xml	yes
	OP57.xml	yes
	OP58.xml	yes
	OP59.xml	yes
	OP60.xml	yes
	OP61.xml	yes
<b>Publications</b>	index.xml	yes
<b>Research</b>	Faculty_Research.xml	yes
	index.xml	yes
	Student_Research.xml	yes
<b>Abstracts</b>	Boon_Stuart.xml	yes
	Crumley_Ellen.xml	yes

		Helliwell_Michelle.xml	yes		
		index.xml	yes		
		Johnson_Teresa.xml	yes		
		Michels_David.xml	yes		
		Talbot_Andrea.xml	yes		
			<b>Active/ Inactive:</b>	<b>XML:</b>	
			<b>50/0</b>	<b>50</b>	
<b>Site_Map_and_Index</b>	[files outside folders]	index.xml	yes	xml	Contains the site map and site index.
		Site_Index.xml	yes		
			<b>Active/ Inactive:</b>	<b>XML: 2</b>	
			<b>2/0</b>		
<b>Temp [not menu visible]</b>	[files outside folders]	Alumni_Gathering_San.xml	no	xml	Contains news items and announcements not considered official news releases.
		AlumniGathering.xml	no		
		External_Review_Pane.xml	yes		
		Index.xml	yes		
		Resume_Workshop.xml	no		
		SLA-SIM_Fundraiser.xml	yes		
			<b>Active/ Inactive:</b>	<b>XML: 6</b>	
			<b>3/3</b>		
<b>TOTALS</b>		<b>Files: 483</b>	<b>Active:</b>	<b>GIF: 16</b>	
			<b>435</b>	<b>JPG:</b>	
			<b>Inactive:</b>	<b>51</b>	
			<b>48</b>	<b>PDF:</b>	
				<b>86</b>	
				<b>XML:</b>	
				<b>329</b>	
				<b>WMV:</b>	
				<b>1</b>	

# SIM Website and Local File System Graphical Overview



## Naming Conventions Chart

### General Concepts:

- 1) No spaces in filenames. Instead, CapitalizeFirstLettersOfWords.
- 2) No initial articles in FileName Sections (no 'A' or 'The').
- 3) People's names are always Last,First (with no spaces anywhere).
- 4) Dates will be updated to keep track of changes (editions) of each file.
- 5) Elements listed below are optional if followed by a '?'.

Once named, files can be meaningfully sorted within their directories, making editing and retrieval as simple as possible.

### HTML Content Files

#### Series or SubSeries\_YYYY-MM-DD\_Author(Last,First)?\_FileName

- Programmes\_2005-10-18\_MLISProgramme
- Courses\_2006-02-22\_ElectiveCourses
- Lectures\_2004-10-06\_Symons,Ann\_ValueOfLeadership

### PDF Files

#### Series\_YYYY-MM-DD\_Author(Last,First)?\_FileName

- Courses\_2005-07-26\_MacDonald,Bertram\_InformationInSocietySyllabus
- ResearchAndPublications\_2004-03-28\_2004Inform

### Graphic Files

#### YYYY-MM-DD?\_Descriptive Filename (may include names if appropriate)

- KennethRoweBuilding
- 2005-12-14\_AlumniAwardPresentation

### Multimedia Files

#### YYYY-MM-DD?\_Name (First,Last)?\_Descriptive Filename

- RoweBuildingTour
- 2005-11-22\_Blustein,James\_HypertextForInformationProcessingLecture

## HTML Content Template

## Appendix F

```

< DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.01 Transitional//en">
<html <!--><meta http-equiv="content-type" content="text/html; charset=iso-10646-1" -->
<!-- ***** insert meta-tag information here ***** -->

  <meta name="SERIES" content="Series Name">
  <meta name="APP" content="YY-MM-DD">
  <meta name="AUTHOR/SOURCE" content="LastFirst">
  <meta name="ATTACHED FILES?" content="Y/N">
  <meta name="TEXT AND ASSET NAME" content="Text to be displayed in browser">
  <meta name="" content="">
  <meta name="" content="">
  <meta name="" content="">

< ***** meta tags end here ***** -->
<!-- <BODY Background Color, Content, Display></BODY></html>
<!-- ***** insert content after this line ***** -->

< ***** content area goes here ***** -->
</body></html>
< ***** templates for different types of content follow *****

A link to be inserted in Collage
<a href="LASER FILE LOCATION HERE">LASER FILE DESCRIPTION HERE</a>

A graphic to be inserted in Collage
<img alt="LASER IMAGE LOCATION HERE" alt="INSERT IMAGE DESCRIPTION HERE">

Text box (see 6.1-6):
<h>SALING TEX.</h>

Paragraph text
<p>PARAGRAPH TEXT</p>

Numbered Lists
<ul>
  <li>LIST ITEM 1</li>
  <li>LIST ITEM 2</li>
</ul>

Bulleted Lists
<ul>
  <li>LIST ITEM 1</li>
  <li>LIST ITEM 2</li>
</ul>
-->

```

## Sample Completed HTML Content Template

## Appendix G

```

< DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.01 Transitional//en">
<html id="main"><head profile="http-equiv="content-type" charset="http://www/html"; <!-- include index=1258?>
<!-- ***** insert meta-tag information here ***** -->

<meta name="SITE SHORT" content="News Releases">
<meta name="URL" content="2000-01-28">
<meta name="AUTHOR/EDITOR" content="">
<meta name="ATTACHED FILES?" content="YES">
<meta name="SITE AND ASSET NAME" content="2000-March-1">
<meta name="" content="">
<meta name="" content="">

<!-- ***** meta-tags end here ***** -->
<title>SLX Website HTML Content Displays</title></head><body>
<!-- ***** insert content after this line ***** -->

<h3>New Adjunct Professor</h3>
<h4>Seamus Lee Stone Appointed as Adjunct Professor For Relus</h4>
<p> - recognition of his years of excellent service to SLX, and his
accomplished academic career, his promotion to Ceramic Professor
F. Relus was awarded this week.</p>
<p>Relus is retiring in June.</p>

<a href="newReleases/index">Back to News Releases</a>

<!-- ***** content ends here ***** -->
</body></html>

```

# Filing Policy Guidelines

## General Description

This set of guidelines describes the 'workflow', the steps taken in processing additions or other changes to the SIM website.

## Workflow

- 1) Content received by Programme Coordinator
- 2) Content vetted, then forwarded to Communications Assistant
- 3) Communications Assistant inserts content into local filing system
  - a) HTML page content inserted into the HTML template
  - b) Templated content file saved in local filing system, within appropriate subdirectory
  - b) HTML template tested in a local browser
- 4) Communications Assistant inserts content into CMS
- 5) Any content which has been replaced will be moved into the Archives folder

## Security and Control

- 1) Only the Communications Assistant should be involved with the contents of the website. He or she should be the only person (aside from the Programme Coordinator) with a valid Collage password.
- 2) All content should be delivered to the Programme Coordinator, who will check the submission before forwarding it to the Communications Assistant.
- 3) It should be understood that the local files, though stored on a shared network drive, are not to be edited or otherwise altered by anyone but the Communications Assistant.

## Archives

- 1) The 'Archives' folder will contain individual compressed archives for each past year
- 2) It will also contain a folder for the current year with a mirror of the current directory structure, and all of the content which has been replaced during the course of the year.
- 3) Before the beginning of each school year, a complete archive should be collected, including the files already in the Archives folder, the current active content from the local filing system, and all content normally stored outside the local filing system (such as student association information and databases).
- 4) This annual Archive, then, will be stored in the Archives folder and the directory structure will be cleaned out in preparation for the new year.

## Specific Implementation Recommendations

Appendix I

- 1) Create a *SIMWebsite* folder on the local networked drive, and then create the directory structure described in Appendix D (graphical overview) inside it.
2. Create a complete archive of the old *SLIS* website, and store it in the *Archives* folder on the networked drive.
3. Create a complete local copy of the current published website on the networked drive. This will require copying all the current content into templated content files as described in Appendices F (HTML template) and H (filing policy), named as per Appendix E (naming conventions). All PDFs, graphics and multimedia files also need to be copied onto the local drive.
4. Create archive files, as described in Appendix H (filing policy), for all inactive content stored in *Collage*.
5. During the first week of September, create a full website archive, as described in Appendix H (filing policy).