#### UMLS Reference Manual Procedures

**Contact Information**

NCBI Bookshelf Team - [booksauthors@ncbi.nlm.nih.gov](mailto:booksauthors@ncbi.nlm.nih.gov)

This is the primary contact for NCBI, which goes to the entire Bookshelf team, and should be used for any communication regarding the UMLS Reference Manual. Note: Sam Grammer handles most of the work relating to the UMLS Reference Manual.

**UMLS Reference Manual Files**

The UMLS Reference Manual consists of 11 different files, one for each chapter of the manual and the preface:

*preface.doc, ch01.doc, ch02.doc, ch03.doc, ch04.doc, ch05.doc, ch06.doc, ch07.doc, ch08.doc, ch09.doc, ch10.doc*

Word doc filenames should not be changed. MMS will retain a copy of all chapters of the UMLS Reference Manual (in Word document format) in the repository (\umlsdoc\umls.nlm.nih.gov\reference\_manual). An archive copy of the Word documents should be created with the most recent version of the Word documents following successful updates of the UMLS Reference Manual by NCBI.

**Change/Update Process**

1. Make changes/updates to the manual Word documents in the repository (umlsdoc\umls.nlm.nih.gov\reference\_manual). Save and commit the updated documents.
2. Send the documents to NCBI via any FTP program, such as SecureFX, FireFTP or Filezilla. The login information is:

* Host: ftp-private.ncbi.nih.gov
* Username: bookshelf
* Password: 7Bzvr8CA

If the default settings do not work, change the File Transfer selection to FTP (instead of SFTP or another option). Look in the connection’s properties for that option.

Place the updated documents in the “nlmumls” folder. You may need to override the older versions of these documents in this folder. NOTE: Only updated documents should be sent to NCBI. Unchanged files should not be sent.

1. E-mail the NCBI Bookshelf Team to notify them that the documents are available on the FTP server. Be sure to indicate which documents have been updated. When necessary, the e-mail should include any special instructions, such as unusual formatting or linking.
2. The NCBI Bookshelf Team will process the documents, which involves converting them to XML, validating the files, and then rendering the files into styled HTML on the Bookshelf. If the NCBI Bookshelf Team runs into any problems or needs clarification regarding the updated documents, they will contact you via e-mail.
3. When updating the Manual is completed, the NCBI Team will notify you via e-mail. Review the updated pages on the NCBI development server and then e-mail NCBI to promote to production. NOTE: If changes need to be made after you have reviewed the pages on the development server, make the changes to the Word documents in the repository and start back at Step #2.
4. If any Word documents were altered by NCBI during their processes, the updated versions of the documents will be indicated in the e-mail from NCBI. Replace the most recent versions of the documents in the repository with these updated documents from NCBI via FTP. Commit these updated documents to the repository.