Northwest Digital Archives (NWDA)
EAD Training Webinar 2

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Homework Review
Encoded Archival Description (EAD) Overview
What is EAD?

• Data structure standard
  – DACS is a data content standard
• Electronically encodes elements of finding aids and their relationships to one another
This...

**Guide to the Katherine Anne Porter Papers**

Goes...

In this box
Encoding Concepts

• Classes of documents
• Types of Markup
• Descriptive Markup
• Document Type Definitions (DTDs)
Classes of Documents

• Fiction
  – Historical
  – Western

• Book
  – Title page
  – Table of Contents
  – Chapters
  – Appendix
  – Index
Types of Markup

- Procedural: Display
- Descriptive: Structural (components)
- Referential: Linking
Descriptive Markup

- Defines components of class of documents
- Defines relationships between elements
- Specifies frequency (repeatable, optional, mandatory)
- Establishes the sequence of elements
- Codified in a DTD
- Documentation: EAD Tag Library, 2002
DTDs

- Literary Texts: TEI
- Archival Inventories: EAD
- Library catalog records: MARC
Separating Markup and Display

Output: Browser, Print

Content: EAD document

Presentation: Stylesheet
What EAD enables

• Use of finding aid content as data
• Standardized data exchange
• Data longevity and migration
• Structured display, navigation, searching
• Multilevel description, and relating those levels to one another
XML Concepts

• Elements: units of information (nouns)
• Attributes: modify elements (adjectives)
• Entities: external files
• DTD: defines document structure
• Stylesheets: prescribe presentation
Elements

• Have start and end tags
  `<unitdate>1897-1898</unitdate>`
• Have formal names and tag names
  Formal name: Date of the Unit
  Tag name: `<unitdate>`
• May contain other elements
Attributes

• Modify the meaning of elements
<date>
Attributes of dates: calendar type, era, certainty
<date calendar="gregorian" era="ce"
certainty="exact">
Entities

• A set of characters referenced as a unit:
  – Special characters (&, @)
  – Non-text files (images, sound files, logos)
  – External text files (boilerplate text, addresses)
Stylesheet

• Separate file

• Can supply default text (headings)

• Controls presentation of data
  – Text format: font, size, color
  – Text layout: indents, line spacing, line breaks

• Change this, and they all change

• Complex programming
Separating Markup and Display

Output: Browser, Print

Content: EAD document

Presentation: Stylesheet

You do this part

NWDA does this
EAD 2002 Tag Library

- Tag Library Conventions
- Attributes
- EAD elements
- Crosswalks
NWDA Best Practice Guidelines

• Based on OAC and RLG guidelines
• Developed, revised, and maintained by the Standards Working Group
• Important to know Required, Mandatory if Applicable, Recommended, and Optional elements and attributes
• Data exchange and presentation depend on compliance with guidelines
  – Encoding for appearance? NOT!
EAD Design: Multilevel Description

• Title-page description of finding aid document
• Collection-level general description of the materials in the collection
• Description of series or other groupings within collection; may include details down to file, item, etc.
EAD High Level
Three Big Sections

<ead>
  <eadheader> describes the finding aid
  <archdesc> describes the collection
  <dsc> detailed description of the collection
</ead>
First Major Section: EAD Header

<eadheader>
  <eadid>
  <filedesc>
  <profiledesc>
  <revisiondesc>
</eadheader>

*This is the least flexible section of an EAD finding aid. Best Practices rule.
Mostly does not appear in presentation of finding aid.
EAD ID

<eadid>:
Unique identifier for the finding aid, not the collection

Different from
DACS Reference Code Element!
The <eadid> Song
(Sing to “Old MacDonald Had a Farm”)

A finding aid it had a name,
<eadid>
Computers could read it just the same,
<eadid>
With an ARK ARK here and an ARK ARK there…..
Forming an identifier

• Obtain from utility site
• Will look like this: 80444/xv51643
• Stable identifier
• Facilitates search engine harvesting
File Description <filedesc>

contains:
<titleproper>: main and NWDA filing titles
<author>: of finding aid
<publicationstmt>: repository
Profile Description `<profiledesc>`

- `<creation> <date>` Who encoded finding aid and when
- `<langusage>` Language of finding aid
- (optional) `<revisiondesc>` Changed made in finding aid after initial encoding
Second Major Section: Archdesc

- `<archdesc>` Level: collection, recordgrp, series, subgrp, subseries, otherlevel
- `<archdesc>` Type: guide, inventory, register, accession
- Still fairly inflexible. This section must be fairly uniform for data exchange.
- Most elements appear in on-screen presentation of finding aid.
<archdesc> <did>

- Wrapper element for core information about the collection
<did> contents

- <repository> Name, address
- <unitid> Unique collection number
- <origination> Creator of collection
- <unittitle> Title of collection
- <unitdate> Dates of collection (span/bulk)
- <physdesc> Bulk of collection
- <abstract> Brief description of creator/collection
- <langmaterial> Language of material
Other <archdesc> elements

- <bioghist> Biographical/Historical note
- <scopecontent> Scope and Content note
- <arrangement> Arrangement of materials
- <accessrestrict> and <userestrict>
- <prefercite> Preferred citation
- <acqinfo> Acquisition information
- <processinfo> Processing information
- <separatedmaterial> Separated materials
- <controlacces> Catalog headings
Third Major Section: Detailed Description of Collection

- `<dsc>` Wrapper element for this section
- Contains nested `<c0x>` elements:
  - `<c01>` subgroup
  - `<c02>` series
    - `<c03>` file
      - `<c04>` item
  </c04></c03></c02></c01>
- Each `<c0x>` element contains further descriptive elements, including a `<did>` and container information
<dsc> continued

• This is the most flexible section of an EAD finding aid

• Local practice mostly rules
Exercise:
Identify EAD elements in Smith Papers
Title (but of the finding aid, not the collection)

Guide to the Carita Gertrude Smith Papers, 1912-1942
Title (but of the finding aid, not the collection)

Guide to the Carita Gertrude Smith Papers, 1912-1942

<titleproper>
Reference Code

Manuscript Collection 002, MtLPH, US
Name and Location of Repository

Lone Pine Historical Society Archives
PO Box 225
Lone Pine, MT 59921
Name and Location of Repository

Lone Pine Historical Society Archives
PO Box 225
Lone Pine, MT 59921

<address>
Finding aid prepared by Jodi Allison-Bunnell, 2002

Not a DACS required element

Not required
<author><date>
Funding for preparing this finding aid was provided through a grant awarded by the National Historical Publications and Records Commission.

Not a DACS required element
Funding for preparing this finding aid was provided through a grant awarded by the National Historical Publications and Records Commission.

Not a DACS required element

Not required <sponsor>
Identification of the Whole-Part Relationship

Overview of the Collection
Identification of the Whole-Part Relationship

Overview of the Collection

<archdesc>
Smith, Carita Gertrude, 1912-2003
Smith, Carita Gertrude, 1912-2003
Carita Gertrude Smith Papers, 1912-1942
Carita Gertrude Smith Papers, 1912-1942
Extent

1 linear foot
Extent

1 linear foot

<extent>
Language and Scripts of the Materials

Language
The collection is in English.
Language and Scripts of the Materials

Language
The collection is in English.
Summary
Carita Gertrude Smith was a resident of Big Sandy, Montana, and taught in small schools in north and south central Montana. The collection contains her personal papers.
Summary
Carita Gertrude Smith was a resident of Big Sandy, Montana, and taught in small schools in north and south central Montana. The collection contains her personal papers.
Reference Code

Manuscript Collection 002, MtLPH, US
Name and Location of Repository

Lone Pine Historical Society Archives
PO Box 225
Lone Pine, MT 59921
Name and Location of Repository

Lone Pine Historical Society Archives
PO Box 225
Lone Pine, MT 59921

<repository>
<address>
Carita Gertrude Smith was born in Bottineau County, North Dakota, on December 7, 1912 to Thomas and Bertha Smith. She was followed by a brother, Samuel, in 1913. The Smiths relocated to Big Sandy, Montana, in 1917, where they homesteaded. He ran a barber shop in town; she was a midwife. Carita attended Big Sandy schools, graduating in 1930 from Big Sandy High School. She earned a teaching certificate from the normal school in Havre in 1931 and went on to teach in a variety of Montana schools, including Toston and Whitefish. Between 1942 and 1943, she married Arden William “Bunny” Bunnell of North Platte, Nebraska. They lived in a number of locations in the eastern United States before setting in Pocatello, Idaho. They had two sons, Roy and Jon. Mr. Bunnell died in 1978; Mrs. Bunnell died in 2003.
Biographical Note

Carita Gertrude Smith was born in Bottineau County, North Dakota, on December 7, 1912 to Thomas and Bertha Smith. She was followed by a brother, Samuel, in 1913. The Smiths relocated to Big Sandy, Montana, in 1917, where they homesteaded. He ran a barber shop in town; she was a midwife. Carita attended Big Sandy schools, graduating in 1930 from Big Sandy High School. She earned a teaching certificate from the normal school in Havre in 1931 and went on to teach in a variety of Montana schools, including Toston and Whitefish. Between 1942 and 1943, she married Arden William “Bunny” Bunnell of North Platte, Nebraska. They lived in a number of locations in the eastern United States before setting in Pocatello, Idaho. They had two sons, Roy and Jon. Mr. Bunnell died in 1978; Mrs. Bunnell died in 2003.
Content Description of Collection
The collection consists of Smith’s personal and professional papers. They document her high school career in Big Sandy and time teaching in one-room schools in Montana.
Scope and Content

Content Description of Collection
The collection consists of Smith’s personal and professional papers. They document her high school career in Big Sandy and time teaching in one-room schools in Montana.
Arrangement
The collection is arranged in three series:
Series I: Personal Papers
Series II: School Papers
Series III: Photographs
Arrangement
The collection is arranged in three series:
Series I: Personal Papers
Series II: School Papers
Series III: Photographs
Conditions Governing Access

Use of the Collection
Restrictions on Access
The collection is open for research.
Conditions Governing Access

Use of the Collection
Restrictions on Access
The collection is open for research.

<accessrestrict>
Administrative Information
Acquisition Information
Not a DACS required element

Administrative Information
Acquisition Information

Not required
<acqinfo>
Not a DACS required element

Processing Information
The collection was processed for the first time in 2003.
The collection was processed for the first time in 2003.

Processing Information

Not required

<processinfo>
Separated Material
Two Big Sandy High School yearbooks were removed to the library collection.
Not a DACS required element

Separated Material
Two Big Sandy High School yearbooks were removed to the library collection.

Not required
<separatedmaterial>
Access Points

Subjects
Smith, Carita Gertrude, 1912-2003 – Archives.
Big Sandy (Mont.)
Schoolteachers – Montana.
Midwives – Montana.
Subjects
Smith, Carita Gertrude, 1912-2003 – Archives.
Big Sandy (Mont.)
Schoolteachers – Montana.
Midwives – Montana.

Access Points

Not required
<controlaccess>
What’s the Minimum?
EAD is a Framework!
<archdesc>
  <did>
    <repository> <corpname>
    <unitid>
    <unittitle>
    <unitdate>
    <physdesc> <extent>
    <abstract>
    <langmaterial>
  </did>
  <scopecontent>
  <accessrestrict>
  <accessrestrict> <subject>
Now the boxes get dressed up!
<ead>
edheader id="a0" langencoding="iso639-2b" scriptencoding="iso15924"
relatedencoding="dc" repositoryencoding="iso15511" countryencoding="iso3166-1"
dateencoding="iso8601">
  <eadid countrycode="us" mainagencycode="[MARC code]" identifier="[ARK]">
    <filedesc>
      <titlestmt>
        <titleproper encodinganalog="title">
          <date>
            <titleproper type="filing" altrender="nodisplay">
              <publicationstmt>
                <publisher encodinganalog="publisher">
                  <date normal="[normalized date]" encodinganalog="date">
                    <address>
                      <addressline>

                      </addressline>
                    </address>
                  </date>
                </publisher>
              </publicationstmt>
            </date>
          </titleproper>
        </date>
      </titleproper>
    </titlestmt>
    <profiledesc>
      <langusage>
        <language encodinganalog="language" langcode="eng" scriptcode="latn">
          <!-- Your content here -->
        </language>
      </langusage>
    </profiledesc>
  </eadid>
</ead>
<archdesc level="[level]" type="[type]" relatedencoding="marc21">
  <did id="a1">
    <repository>
      <corpname>
        <unitid countrycode="us" repositorycode="[MARC code]">
          <unititle>
            <unitdate type="[inclusive or bulk]" normal="[normalized date]">
              <physdesc>
                <extent>
                  <abstract>
                    <langmaterial>
                  </abstract>
                </langmaterial>
              </physdesc>
            </unitdate>
          </unititle>
        </unitid>
      </corpname>
    </repository>
    <scopecontent id="a3">
    <accessrestrict id="a14">
      <controlaccess id="a12">
        <controlaccess>
          <subject altrender="nodisplay" source="nwda">
        </subject>
      </controlaccess>
    </accessrestrict>
  </did>
</archdesc>
<ead>
<eadheader id="a0" langencoding="iso639-2b" scriptencoding="iso15924"
relatedencoding="dc" repositoryencoding="iso15511" countryencoding="iso3166-1"
dateencoding="iso8601"/>
<ead>
<eadheader id="a0" langencoding="iso639-2b" scriptencoding="iso15924"
relatedencoding="dc" repositoryencoding="iso15511" countryencoding="iso3166-1"
dateencoding="iso8601"/>
<eadid countryCode="us" mainagencycode="[MARC code]"
    identifier="[ARK]"> </eadid>
<eadid countrycode="us" mainagencycode="xolphe"
identifier="80444/xv12345">MtLPHMss002.xml</eadid>
<filedesc>
  <titlestmt>
    <titleproper encodinganalog="title">
      <date>
    </date>
  </titleproper>
</titlestmt>
</filedesc>
<filedesc>
  <titlestmt>
    <titleproper encodinganalog="title">Guide to the Carita Gertude Smith Papers</titleproper>
    <date>1930-1942</date>
  </titlestmt>
</filedesc>
<titleproper type="filing" altrender="nodisplay"> </titleproper>
<titleproper type="filing" altrender="nodisplay">Smith (Carita Gertrude) Papers</titleproper>
<publicationstmt>
  <publisher encodinganalog="publisher"></publisher>
  <date normal="[normalized date]" encodinganalog="date"></date>
</publicationstmt>
<publicationstmt>
  <publisher encodinganalog="publisher">Lone Pine Historical Society</publisher>
  <date normal="2002" encodinganalog="date">2002</date>
</publicationstmt>
<address>
  <addressline>
  </addressline>
</address>
<address>
  <addressline>Lone Pine Historical Society</addressline>
  <addressline>PO Box 225</addressline>
  <addressline>Lone Pine, MT 59901</addressline>
  <addressline>406-222-1234</addressline>
  <addressline>http://lonepinehistorical.org</addressline>
  <addressline>archives@lonepinehistorical.org</addressline>
</address>
<profiledesc>
  <langusage>
    <language encodinganalog="language"
langcode="eng" scriptcode="latn"></language>
  </langusage>
</profiledesc>
<profiledesc>
  <langusage>Finding aid written in</langusage>
  <language encodinganalog="language"
    langcode="eng" scriptcode="latn">English</language>
</langusage>
<archdesc level="[level]" type="[type]" relatedencoding="marc21">
  <did id="a1">
    <repository>
      <corpname>
        <unitid countrycode="us" repositorycode="[MARC code]">
          <unittitle>
            <unitdate type="[inclusive or bulk]" normal="[normalized date]">
              <physdesc>
                <extent>
                  <abstract>
                    <langmaterial>
                      ...
                    </langmaterial>
                  </abstract>
                </extent>
              </physdesc>
            </unitdate>
          </unittitle>
        </unitid>
      </corpname>
    </repository>
    <scopecontent id="a3">
      <accessrestrict id="a14">
        <controlaccess id="a12">
          <controlaccess>
            <subject altrender="nodisplay" source="nwda">
              ...
            </subject>
          </controlaccess>
        </controlaccess>
      </accessrestrict>
    </scopecontent>
  </did>
</archdesc>
<archdesc level="[level]" type="[type]" relatedencoding="marc21"/>
<archdesc level="collection" type="guide" relatedencoding="marc21"/>
<did id="a1">
<did id="a1">
<repository>
  <corpname></corpname>
</repository>
<repository>
  <corpname>Lone Pine Historical Society</corpname>
</repository>
<unitid countrycode="us" repositorycode="[MARC code]" /></unitid>
<unitid countrycode="us" repositorycode="xolph">Mss 002</unitid>
<unittitle>Carita Gertude Smith Papers</unittitle>
<unitdate type="inclusive" normal="1912/1942">1912-1942</unitdate>
<physdesc>
  <extent></extent>
</physdesc>
<physdesc>
  <extent>1 linear foot</extent>
</physdesc>
Carita Gertrude Smith was a resident of Big Sandy, Montana, and taught in small schools in north and south central Montana. The collection contains her personal papers.
The collection is in English.
<scopecontent id="a3"></scopecontent>
The collection consists of Smith’s personal and professional papers. They document her high school career in Big Sandy and time teaching in one-room schools in Montana.
<accessrestrict id="a14"></accessrestrict>
The collection is open for research.
<controlaccess id="a12">
  <controlaccess>
    <subject altrender="nodisplay" source="nwda"></subject>
  </controlaccess>
</controlaccess>
<controlaccess id="a12">
  <controlaccess>
    <subject altrender="nodisplay" source="nwda">Women</subject>
  </controlaccess>
</controlaccess>
Smith, Carita Gertrude, 1912-2003
<origination>
  <persname encodinganalog="100" role="creator" source="lcnaf">Smith, Carita Gertrude, 1912-2003</persname>
</origination>
Acquisition Information
Processing Information
The collection was processed for the first time in 2003.
The collection was processed for the first time in 2003.
Separated Material
Two Big Sandy High School yearbooks were removed to the library collection.
Two Big Sandy High School yearbooks were removed to the library collection.
Smith, Carita Gertrude, 1912-2003 – Archives.
Big Sandy (Mont.)
Schoolteachers – Montana.
Midwives – Montana.
<controlaccess>
  <persname encodinganalog="600" role="subject">Smith, Carita Gertrude, 1912-2003 – Archives.</persname>
</controlaccess>
<controlaccess>
  <geogname role="subject" encodinganalog="651">Big Sandy (Mont.)</geogname>
</controlaccess>
<controlaccess>
  <subject encodinganalog="650">Schoolteachers – Montana.</subject>
</controlaccess>

<controlaccess>
  <subject encodinganalog="650">Midwives – Montana.</subject>
</controlaccess>
Questions and Discussion
Homework:

• Create your own framework
• Fill in with your finding aid
• Prepare to share!