XMetaL installation and setup instructions
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Note: As of April 2008, Northwest Digital Archives no longer trains new and continuing members on XMetaL. Since the majority of the members have acquired and set up workflows around XMetaL, NWDA will continue to support members' use to the best of our abilities.

Download XMetaL
XMetaL is available at http://na.justsystems.com/content-xmetal. As of this writing, XMetal Author Essential Edition (Academic) 6.0 is $395 per license. Purchase by contacting sales_na_team@justsystems.com

The first time you open the software, you'll need to paste in your license key and register your software. Follow the vendor's instructions and your institution's purchase procedures.

Note that the default installation of XMetaL places the program on the C: drive of your computer in \Program Files\XMetaL\Author. Within the \XMetaL\Author folder there is a list of subfolders, including Display, Rules, Template, etc.

Setup XMetaL
Before you begin creating EAD-encoded finding aids in XMetaL, you'll need to put several EAD "helper" files into several of these subfolders, as shown below. Find these files at the NWDA member site/Tools, http://orbiscascade.org/index/northwest-digital-archives-tools.

> \+ ead.dtd Save this in the Rules subfolder
> \+ ead.tbr Save this in the Rules subfolder
> \+ ead.ctm Save this in the Rules subfolder
> \+ ead.css Save this in the Display subfolder
> \+ NWDATemplate.xml Save this in the Template/General subfolder

Save these "helper" files on any PC on which finding aids are prepared in XMetaL. If you plan to save your finding aid files in a network directory, the files ead.dtd, ead.tbr, ead.ctm, and ead.css should also be saved in that network directory.

When you download these helper files, XMetaL changes the file extensions, and they don't work as they should. So when users download the EAD helper files from the NWDA site, they should not accept any default filenames, file extensions, or file types but rather enter it by hand. Selecting "All Files" from the "Save as type:" box allows the person doing the download to see all the files in the folder and make sure that the correct files have been saved.

The first time XMetaL is opened and the user creates a new finding aid via the File/New menu, s/he will be prompted for a DTD or schema. Select ead.dtd in the Rules subfolder.

XMetaL creates one file that disrupts the correct display of the project template. This file is located in In c:\Program Files\XMetal 5.1\Author\Startup. Go to that folder and delete the file called multipleOutput.mcr

Use XMetaL
Set Up the Default Encoding Screen
Open XMetaL. The first time you open the application after installation, some XMetaL practice files may appear. If so, click on the File menu and select Close All. Tips may also appear; you can close those too, and set them to appear (or not) every time you open.

Click on the File menu and select New from the pull-down menu. You will be presented with a list of templates to choose from, including NWDATemplate. Select the NWDATemplate. If you're prompted for a DTD or rules file, select ead.dtd or ead.rlx

After the template opens, click on the View menu and select Structure View. If asked about hiding the Structure View by default, select Yes.

Click on the Tools menu and select Options. Click on the View tab. Click "Open new documents in..." to Tags On View. Click OK. Click on the View menu again and select Tags On.

Click on the View menu again and select Attribute Inspector; click on the View menu one more time and select Element List.

This view of the NWDA encoding template should now appear by default whenever you open an existing finding aid file or create a new one using the NWDA template. You can change the view by clicking on the Normal view (page icon) or Plain Text view (angle brackets <> icon) at the bottom left of the screen, or through the View menu.

Element and Attribute Boxes in XMetaL
If you set up the default encoding screen as described above, you'll see two boxes on the right side of the screen. The top box contains the Attribute values for each EAD element, and the Element box shows elements that may be added to the finding aid document. What is visible in the boxes depends on the location of the cursor at the time. If the cursor is on a particular element, the Attribute box shows the attributes that apply to that element, and the Element box shows the elements that may be added at that point.

To add or edit an attribute for a particular element, place the cursor on the element. In the Attributes list on the right side of the screen, click into the desired attribute and type in the appropriate value. If a drop-down box is provided, select the appropriate value from the drop-down list.

To add an element to your finding aid, place the cursor at the point in the finding aid where the element should be added. In the Elements list on the right side of the screen, double-click the desired element. It should appear in the desired location.

Elements may be highlighted and dragged to any point in a finding aid or highlighted and deleted. If the element does not appear in the location to which you drag it, it is illegal at that location and will remain at its starting point. XMetaL uses the ead.dtd file to enforce the rules of EAD and will not permit an element to be placed in a location that is not authorized by the EAD DTD. In such a case, check the EAD Tag Library for assistance.

Entering Finding Aid Data into the NWDA Template for XMetaL
Prompts in the highlighted fields on the template provide brief guidance on the content to enter into each field; the prompts themselves will disappear when you enter text into them. Just place your cursor on one of the highlighted prompts and begin typing. Most typical word processing functions are available in XMetaL.

Some of the fields in the EAD template call for data that is repetitive (such as title and dates); that's OK. It's also fine to leave fields blank. During encoding, blank fields may be left in the finding aid for later use, but they should be deleted before the finding aid is submitted to the NWDA database.

Editing the NWDA Template in XMetaL
The NWDA Template for XMetaL complies with the NWDA Best Practice Encoding Guidelines, but many elements and attributes are optional. If your institution rarely uses some of the elements defaulted into the NWDA template for XMetaL, you may delete them from the template. You may also add default elements and attribute values to the template, include default text, add a link to your logo, and alter the wording of template prompts.

In XMetaL, open the NWDA template file from c:\Program Files\XMetal 5.1\Author\Template. Locate each element you wish to delete, highlight the element, and press the Delete key. You may also add default elements and attributes to your institution's version of the template if desired. Position the cursor in the desired location in the template, select the element from the element list on the bottom right side of the screen, and double click it to add it to the template. Highlight that (or any other) element and fill in default attribute values on the top right side of the screen (making sure to comply with the NWDA Best Practice Encoding Guidelines for EAD). To enter default text, such as your repository address, into certain elements, simply enter the text in the desired element and save the template file.

You may also change or delete the prompts used in the NWDA template:
        o Place the cursor on the prompt and click into the plain text view (click on the angle-bracket icon on the lower left of the screen).
        o In the XMetaL "xm-replace_text" element, highlight the text inside the curly braces {} and type in new text.

Example:
<?xm-replace_text {Enter date of substantial revision of finding aid, if any}?>

After editing the template file, save it in the Template directory under a new name. Including the normalized date of the template (i.e. 20080403) as part of the filename is highly recommended, as is adding a prompt text noting who created the template, type of template, etc. Finding aids based on your revised template (created after you revise the template, i.e.) will reflect the template changes, but finding aids encoded according to a previous version of the template will not.