

HOW TO USE THE CRRA TEMPLATE TO PRODUCE AN EAD FINDING AID

In your ead folder you should have this set of instructions along with several other files:

- **new-ead.bat** - This is a batch file that creates a new ead template in a file called template.txt
- **ead-form.txt** - This is the empty form used by new-ead.bat – it will overwrite template.txt
- **ead.exe** - This is the program that transforms template.txt into a valid ead finding aid
- **ead.xsl** - This is an xml stylesheet that transforms the finding aid into html for formatted display
- **dsc.xsl** - This is an xml stylesheet that transforms the finding aid into html for display of the template data
- **ead.css** - This is an html stylesheet that controls fonts, margins, spacing for display
- **ead.dtd** - This is ead's Document Type Definition - it helps validate and display your ead file
- **lib.zip** - a support file for the program
- **libzip-tmp** - another support file
- **perl58.dll** - another support file

To edit the text (.txt) files, you should use a plain text editor such as NOTEPAD (or Notepad++). You can open a plain text editor by double-clicking the icon for ead-form.txt or template.txt.

In general you should not have to edit ead-form.txt, but it would make sense to add the name, address and key of your repository on the appropriate lines so that they will always be copied to the template.txt file when you are ready to create a new ead finding aid. (The key is a three-letter code assigned to your repository by CRRA. Eric Lease Morgan, emorgan@nd.edu, is the person who presently assigns these codes.)

1. TO BEGIN A NEW FINDING AID

Double-click the icon for new-ead – you should see a blank template. Each line has a prompt ending in an equal sign. Do not change the prompts. Fill in the blanks by typing to the right of the equal sign.

```
ead-form - Notepad
File Edit Format View Help
repository = University of Notre Dame Archives
  address = 607 Hesburgh Library, Notre Dame, IN 46556 - phone (574) 631-6448
    key = NDA
      id =
        title =
          dates =
            originator =
              extent =
                restrictions =
                  source =
                    scope =
                      background =
                        persnames =
                          famnames =
                            corpnames =
                              subjects =
                                titles =
                                  dsc =
```

If you have made the appropriate changes to ead-form.txt, your blank template should already have the name, address, and repository key. (Phone numbers can be included at the end of your address.)

First type the **id**. Each collection must have a unique code which CRRA will use to distinguish it from other collections. You yourself make up the code for each of your collections. The code should not have any spaces in it. Put the appropriate id code after the equal sign on the id line. Press the down arrow to go to right of the equal sign on the next line. Fill in the **title** of the collection (e.g., Department of Information Services Records).

On the next line indicate the range of **dates**. This can be a single date if the collection has nothing beyond that date, or a span of dates. It can be a simple span, e.g. 1888-1901, or more complicated, e.g. 1888-1901 (bulk 1890-1895). For approximate date use "ca."; for whole decades add "s": ca. 1888-1890s.

Next identify the person or corporate entity responsible for the **origin** of the collection — the creator of the file system or collector of the contents. For **extent** give the linear or cubic measure of the whole collection, e.g. 23 linear feet.

Fill in the **restrictions** if there are any restrictions on access to the collection. Otherwise write "None" or "No restrictions". For restrictions, and for the three following lines, if you need to write one or more paragraphs of explanation you can do so. The first paragraph should begin after the equal sign; let the line get as long as necessary for the paragraph. You can turn on automatic wrapping, but do not press Enter to create new lines. Press Enter only when you want to start a new paragraph.

```
template - Notepad
File Edit Format View Help
repository = Notre Dame Archives
address = 607 Hesburgh Library, Notre Dame, IN 46556
key = NDA
id = EC
title = Elizabeth Christman Papers
dates = 1934-1996
originator = Elizabeth Christman
extent = 1 linear foot
restrictions = Open for research
source = Gift of Elizabeth Christman
scope = Manuscripts and tear sheets of her fiction, non-fiction, and verse, including
background = Born in 1914, Elizabeth Ann Christman, who grew up in the Saint Louis area, f
persnames = Christman, Elizabeth
Greene, Graham, 1904-1991
famnames =
corpnames = University of Notre Dame
DePauw University
subjects = Publishers and publishing--United States--Biography.
titles = Hell Lay About Them: Childhood in the Work of Graham Greene
Quick as a Dodo
Horse Died! Need Ride to Boston! A Collection of Observer Classifieds
dsc = 1 EC ~ 1934-1996 ~ collection ~ Elizabeth Christman Papers
2 EC Ms. 1/01-12 ~ 1956-1996 ~ series ~ Elizabeth Christman: Manuscripts
3 EC Ms. 1/01 ~ 1956-1996 ~ file ~ Manuscripts [fiction]
3 EC Ms. 1/02 ~ ~ file ~ Manuscripts [non-fiction]
3 EC Ms. 1/03 ~ ~ file ~ Manuscripts [verse]
2 EC Pr. 1/01-11 ~ 1934-1996 ~ series ~ Elizabeth Christman: Printed Material
3 EC Pr. 1/01 ~ 1934-1996 ~ file ~ Tear Sheets
{ Christman's stories, articles, columns, poems, and letters to editors on pages torn from pe
3 EC Pr. 1/02-11 ~ ~ subseries ~ Juniper Press Books {10 volumes.
{ Books produced by Christman's course in publishing.
4 EC Pr. 1/02 ~ 1977 ~ item ~ Quick as a Dodo / by Ralph McInerny, illustrated by Pam Butterw
```

Similarly, for **source**, **scope**, and **background** press the Enter key twice whenever you want to start a new paragraph.

Source: write a paragraph or more explaining the source of the collection — who sent it and when and under what circumstances. This can be as little as a sentence fragment or as long as several paragraphs.

Scope: type or paste the scope and content note for the collection.

Background: type or paste the biographical or historical sketch associated with the collection.

The next five lines will provide an index of the **names**, **subjects**, and **titles** associated with the collection in a form governed by authorities. In the United States we rely on the Library of Congress for these authority files. You can search these files online at:

<http://authorities.loc.gov>

Index	Count	Subject Heading	Source
92	1	Publishers and publishing--United States--Accounting.	Library of Congress subject headings
93	1	Publishers and publishing--United States--Bibliography.	Library of Congress subject headings
94	178	Publishers and publishing--United States--Biography.	Library of Congress subject headings
95	1	Publishers and publishing--United States--Biography--Congresses.	Library of Congress subject headings
96	1	Publishers and publishing--United States--Biography--Dictionaries.	Library of Congress subject headings
97	14	Publishers and publishing--United States--Biography--Juvenile literature.	Library of Congress subject headings
98	1	Publishers and publishing--United States--California.	Library of Congress subject headings
99	1	Publishers and publishing--United States--Georgia.	Library of Congress subject headings

To find out if the Library of Congress has established an official form of the names in the collection, search for them using the Name Authority Headings. For subjects use the Subject Authority Headings. If an official LC name or subject exists, use it in your list under **persnames**, **corpnames**, **famnames**, and **subjects**.

If no appropriate heading exists in the authority file, list personal names in inverted order (last name, first names). List corporate names and without any inverted order. Once the program generates a new ead file, you will have to manually delete the attributes that say that these terms were established by authority of the Library of Congress. More about that later.

In these lists you need only press the Enter key once to go on to the next index term. In general these names, subjects, and titles should come from the scope and content note. If they are important enough in the collection to be included in one place, they should also be included in the other.

2. DESCRIPTION OF SUBORDINATE COMPONENTS

For the description of subordinate components (dsc) or the box/folder list we rely on field separators to identify the different parts of each line of description.

Here is an example of dsc format:

```
dsc = 1 RH ~ ~ collection ~ Reynold Hillenbrand: Manuscripts
2 RH 1-05/ ~ ~ series ~ Seminary - St Mary of the Lake; Quigley
3 RH 1-03/ ~ ~ subseries ~ Records of Hillenbrand's Student Years
4 RH 1/01 ~ 1924-1925 ~ file ~ Seminary Notebooks - Philosophy
4 RH 1/02 ~ 1925-1926 ~ file ~ Seminary Notebooks - Apologetics
. . .
3 RH 3/ ~ 1930-1935 ~ subseries ~ Quigley and Mission Board
4 RH 3/19 ~ 1930 ~ file ~ Seminary - ARGUS - Correspondence
4 RH 3/20 ~ 1930-1931 ~ file ~ Seminary - Book Orders
3 RH 3-05/ ~ 1935-1944 ~ subseries ~ Hillenbrand at Mundelein
4 RH 3/24 ~ ~ file ~ Seminary - Notebook of Meditation
4 RH 3/25 ~ 1935-1936 ~ file ~ Seminary - Retreat Notes
. . .
2 RH 5-21/ ~ ~ series ~ Catholic Action
```

Each line begins with a number indicating the level of the description in the hierarchy of the collection. Number 1 represents the most general level. Number 2 the next level under it — which might be a record group, a subgroup, a series, a subseries, a file, or even an item, depending on how many levels of hierarchy have been identified in the analysis of the collection.

After the level number comes the collection id (if you choose to include it on every line of your inventory), then the box/folder or other identification number, then the first field separator, a tilde (~). After the tilde come span dates, if any, followed by another tilde. Next comes an indicator of the level of description followed by the last tilde. The line of description generally concludes with the title or characterization of the unit being described.

The possible levels of description are defined by ead as fonds, collection, recordgrp, subgrp, series, subseries, file, and item.

If you are describing a large collection, you can use these abbreviations instead:

F => fonds
C => collection
R => recordgrp
r => subgrp
S => series
s => subseries
f => file
i => item

So in our example (above) we could have written:

```
1 RH ~ ~ C ~ Reynold Hillenbrand: Manuscripts
2 RH 1-05/ ~ ~ S ~ Seminary - St Mary of the Lake; Quigley
3 RH 1-03/ ~ ~ s ~ Records of Hillenbrand's Student Years
4 RH 1/01 ~ 1924-1925 ~ f ~ Seminary Notebooks - Philosophy
4 RH 1/02 ~ 1925-1926 ~ f ~ Seminary Notebooks - Apologetics
```

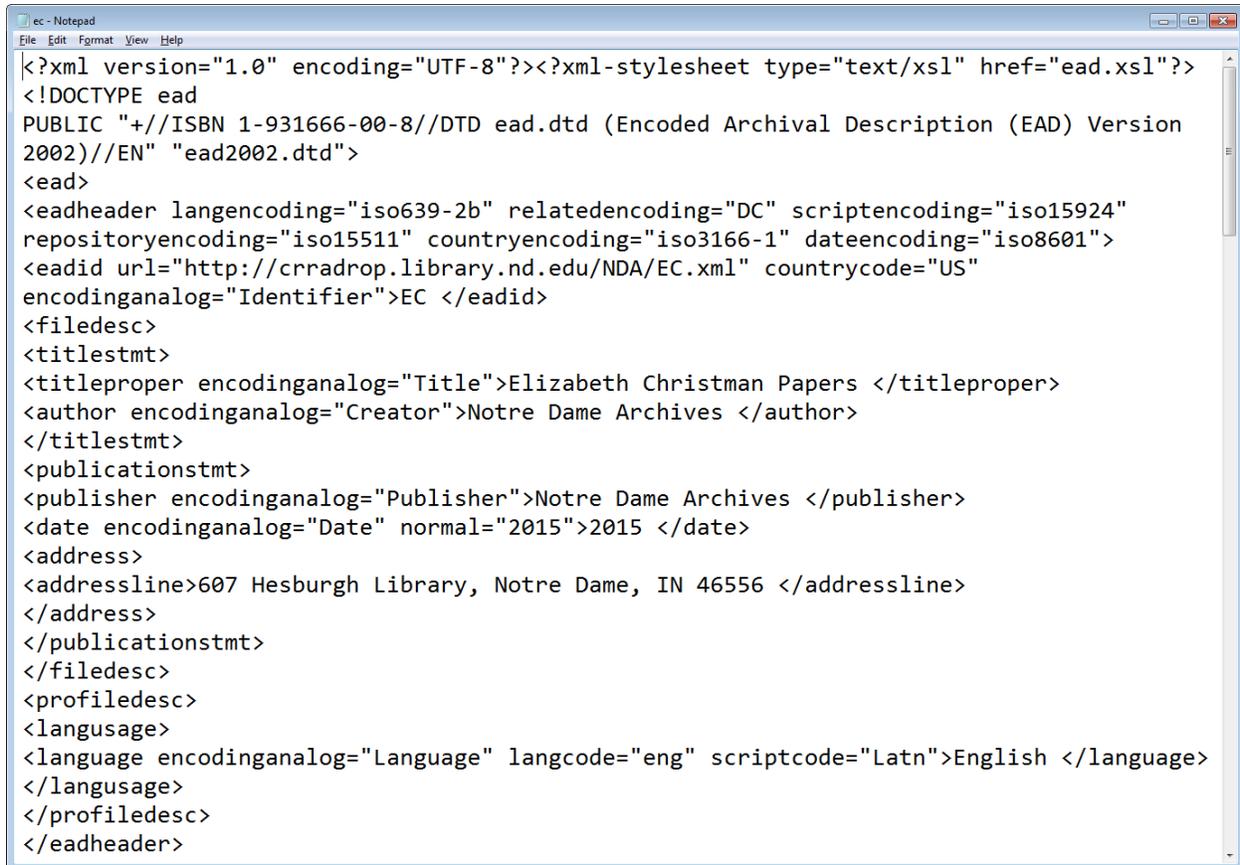
Of course, you will follow your own local practice in your inventory — you might have "boxes 1 - 5" in the second line, "boxes 1 - 3 " in the third, and "box 1 folder 1" in the fourth if that is the way you prefer to list your collection. Or you might have a system that uses special punctuation, so that the third item in the second folder of the first box would be "1.2.3".

If you need to add a **physical description** at any level, you can do so at the end of the line, introducing it with a left curly brace ({}). This is another kind of field separator -- you do not need to end the line with a right curly brace. If you want to add a **scope-and-content note** at any level, you can press Enter and put the curly brace at the left margin. This will result in a scope-and-content note in the ead. You can create a series of paragraphs in the scope and content note by beginning each new paragraph on a new line beginning with a curly brace.

Generally you create these dsc files using a text editor before you even start to use the ead template, though it is possible to type them directly into the template. If you have already created a dsc file with a text editor, you can mark and copy it in the text editor (Ctrl-C in Windows) and paste it in after the "dsc =" prompt (Ctrl-V in Windows).

3. TO GENERATE YOUR EAD FILE

Save your template.txt file and quit your text editor. Double-click on the EAD program. It should produce a valid ead finding aid with the id you gave followed by ".xml" (which Windows might hide from you). Notepad should display the file showing the ead markup. If you open the file with a web browser, you should be able to see it with some formatting (if it is valid) or with error messages (if it is not).



```
<?xml version="1.0" encoding="UTF-8"?><?xml-stylesheet type="text/xsl" href="ead.xsl"?>
<!DOCTYPE ead
PUBLIC "-//ISBN 1-931666-00-8//DTD ead.dtd (Encoded Archival Description (EAD) Version
2002)//EN" "ead2002.dtd">
<ead>
<eadheader langencoding="iso639-2b" relatedencoding="DC" scriptencoding="iso15924"
repositoryencoding="iso15511" countryencoding="iso3166-1" dateencoding="iso8601">
<eadid url="http://crradrop.library.nd.edu/NDA/EC.xml" countrycode="US"
encodinganalog="Identifier">EC </eadid>
<filedesc>
<titlestmt>
<titleproper encodinganalog="Title">Elizabeth Christman Papers </titleproper>
<author encodinganalog="Creator">Notre Dame Archives </author>
</titlestmt>
<publicationstmt>
<publisher encodinganalog="Publisher">Notre Dame Archives </publisher>
<date encodinganalog="Date" normal="2015">2015 </date>
<address>
<addressline>607 Hesburgh Library, Notre Dame, IN 46556 </addressline>
</address>
</publicationstmt>
</filedesc>
<profiledesc>
<language>
<language encodinganalog="Language" langcode="eng" scriptcode="Latn">English </language>
</language>
</profiledesc>
</eadheader>
```

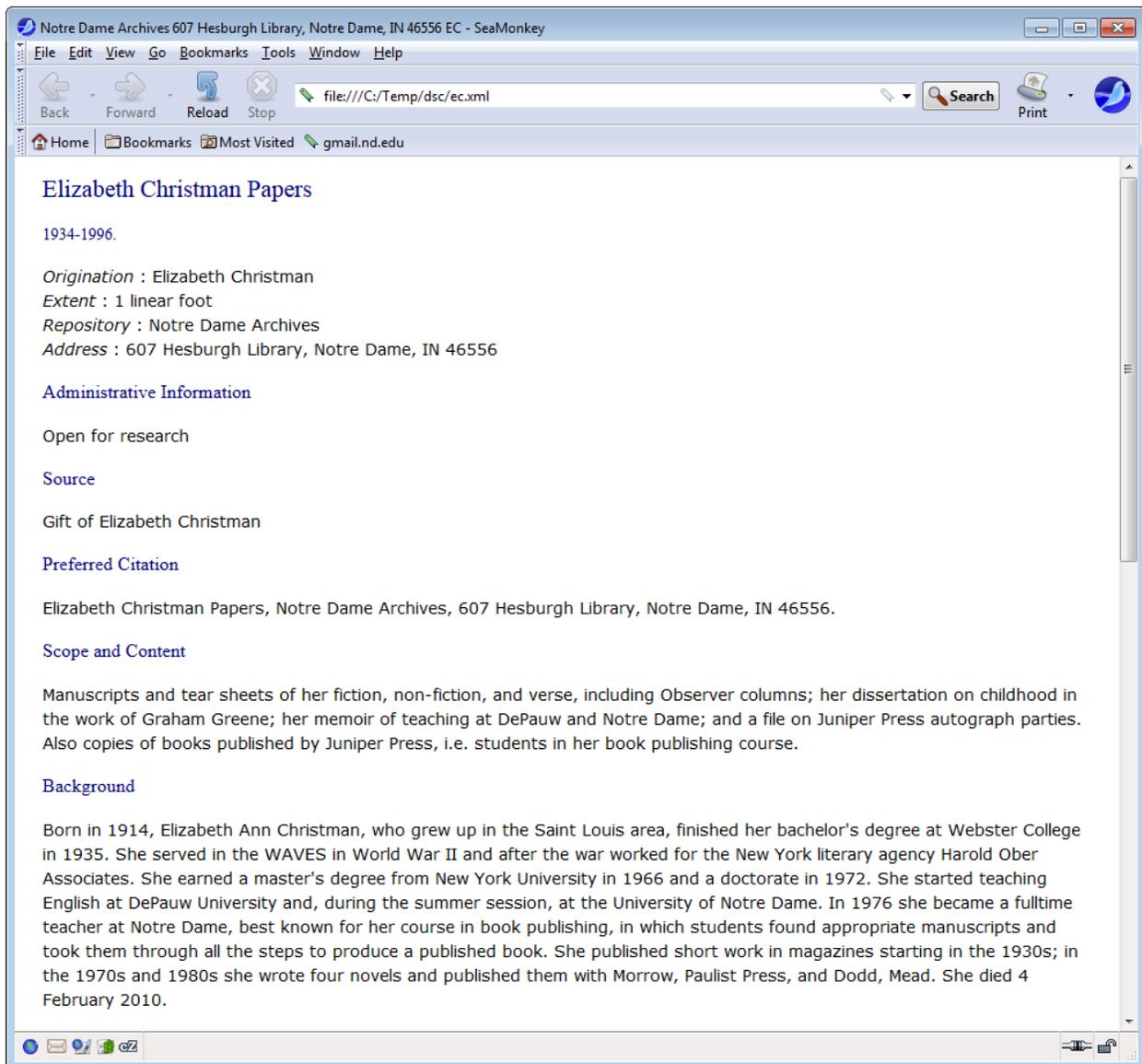
You can edit this xml file with Notepad (or another plain text editor). You might need to do this if you have names or subjects not included in the Library of Congress authority files. Look for the appropriate tag, for example "<persname" and eliminate the attributes between "<persname" and ">".

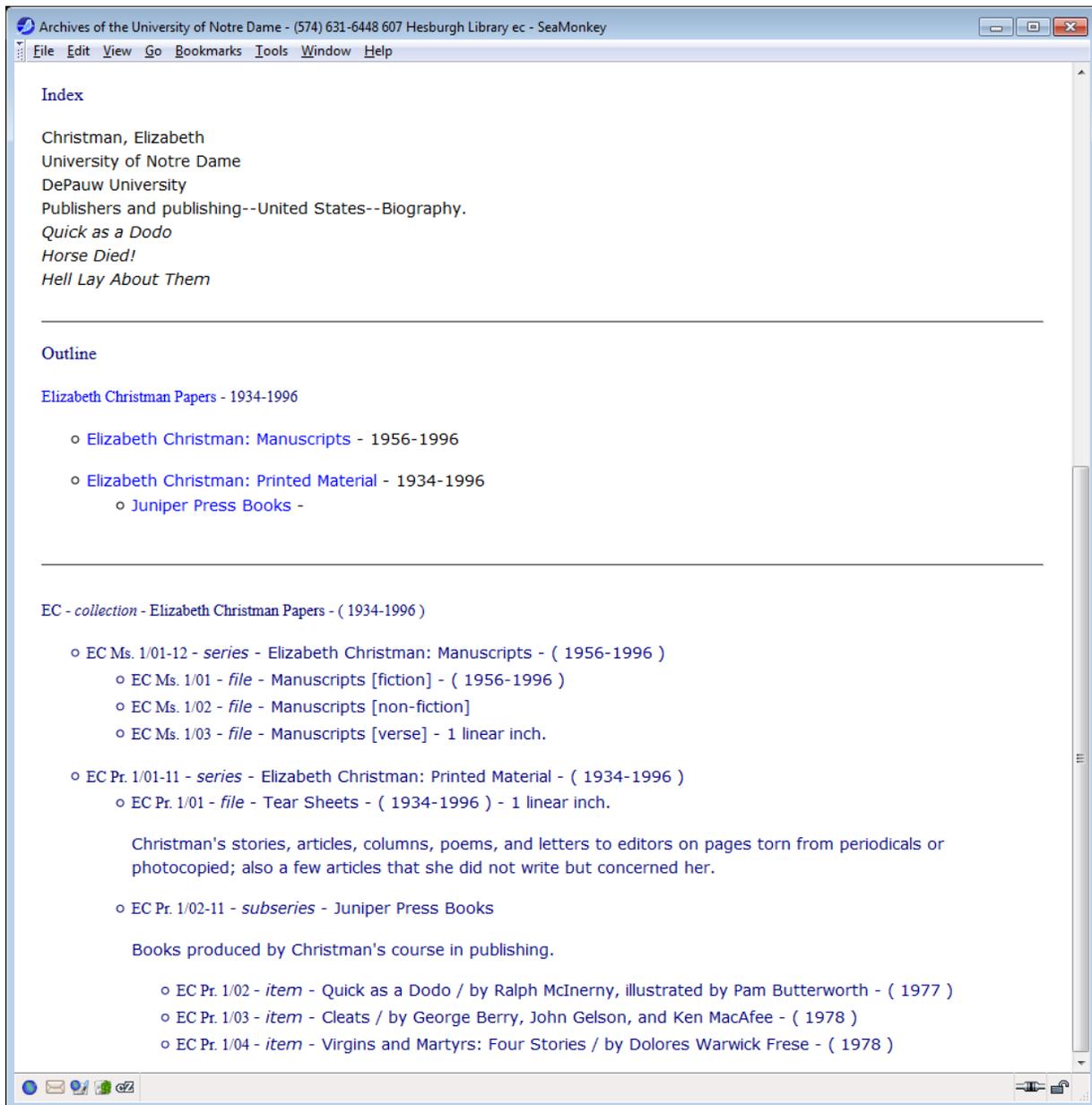
You might also want to identify titles in your Scope and Content Note (or elsewhere) by enclosing them with <title> and </title>. So if you mention Jude the Obscure, you can make it <title>Jude the Obscure</title>.

What if you want to go back to the template data and change it? You can make your web browser display the template rather than the formatted finding aid. To do this, change the end of the first line of the xml file so that it calls upon dsc.xml instead of ead.xml. Change:

```
<?xml-stylesheet type="text/xsl" href="ead.xml"?>      to  
<?xml-stylesheet type="text/xsl" href="dsc.xml"?>
```

Save the xml file and load it again with your web browser. Mark, copy, and paste the template data into a template.txt file. You can then edit the file and run the EAD program again to generate a new xml file.





Questions?

Email

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4. OTHER RESOURCES

EAD Tags at the Library of Congress

<http://www.loc.gov/ead/tglib/>

DACS Describing Archives: A Content Standard

<http://www2.archivists.org/standards/DACS>

ISAD(G) International Standard Archival Description

[http://www.icacds.org.uk/eng/ISAD\(G\).pdf](http://www.icacds.org.uk/eng/ISAD(G).pdf)

Library of Congress Authorities

<http://authorities.loc.gov>