OhioLINK DMSC  
EAD Task Force  
Meeting Minutes  
April 12, 2006

Location: Ohio State University, Thompson Library: Columbus, Ohio

Present: Linda Cantara, Cara Gilgenbach, Amy McCrory (Co-Chair), Amanda Wilson (Co-Chair), Dianna Ford, Toni Jeske

Absent: Advisors Barbara Strauss and Cynthia Ghering, and Anne Gilliland (OhioLINK liason)

Agenda Item 2: Content Guidelines

Comments from Task Force Advisors and DMSC:

- In response to comments that the element pages were too long, Amy and Amanda split them into basic descriptive info, and added a link to the more technical info including attributes, subelements, and examples.

- Amy handed out a page of revisions made in response to comments. The handout includes revision to “#5 Recursive Elements” defining a recursive element, and a “Statement to precede the Element Pages” explaining the scope of elements in the guidelines.

ACTION: Amanda will develop the “Statement to Precede the Element Pages” into a Scope of the Content Guidelines. Change “two-thirds” to “half of the total EAD element set”. Explain that other tags from the complete tag library may also be used (give URL). Clarify that the content guidelines were written for archivists in Ohio, and those interested in the systems requirements for EAD will want to consult the DTD online.

Future Actions on Content Guidelines:

- Make PDF and HTML versions available online.
- Recommend to DMSC that the guidelines be updated yearly.
- Recommend to DMSC that a statewide EAD listerv be created for reporting problems and updates in the future (could Anne coordinate it?)

Changes and Updates to Content Guidelines:

ACTION ITEMS for Names in Bold:

- Amy will make changes listed below to the PDF Content Guidelines.
- Amanda will create a content guideline template to add before the 1st element page.
- Toni will change the Subject CG from “opt” occurrence to “Mandatory if applicable”.
- Each Task Force Member will check the guidelines they previously reviewed for the following:
  - Accuracy
  - Appropriate use of the element in top level and component level examples
  - “Occurrence” matches Linda’s chart (Append.E which will be final Append.A)
  - Examples that are too granular
  - Verify examples exist in the latest version of the encoded Kivist.finding aid.
• Appendix A -- EAD Finding Aid Examples:
  o Begin the Appendix with the text document.
  o Verify that all changes made to the encoded finding aid have been made to the
text document.

• Appendix B -- Encoding Analog Mappings and Examples (MARC and DC)
  
  Dianna will make the following changes and then e-mail the charts to Linda:
  ▪ Change the backslash to a colon between the element name and the tag.
  ▪ Add an intro statement explaining the chart includes only some of the
    possible elements that can be mapped, and others may be used
    according to local decisions.
  ▪ Create a separate chart for Dublin Core.

  Linda will encode Appendix B in HTML. It will be available in PDF too.

• Appendix C-- Recommended Controlled Vocabulary Lists:

  We discussed whether to include all the controlled vocabs listed. We decided it is
better to provide a more comprehensive list than a shorter list.

  Amanda will make the following changes:
  ▪ Add a statement explaining that all the controlled vocabularies listed are
    not required, and local practice should be followed.
  ▪ Under code “local”, replace the phrase “use as last resort” with different
    wording such as “if your institution has developed a list of headings, you
    may want to use it in place of the lists provided here.”
  ▪ Remove EAC because it is a mark up scheme
  ▪ Add a citation to controlled vocab lists that are not available online
  ▪ Indicate that the LC Name Authorities File online can also be searched for
    Subject Headings.
  ▪ Show tag example of someone applying subject heading with “source=”

• Appendix D -- Using Lists:
  No changes. This appendix was discussed via e-mail prior to the meeting.

• Appendix E -- List of All Elements With Occurrence:
  o Chart E-1 is an alpha list of the elements, and will be the content of Appendix E.
  o Chart E-2 will not be used since we already have a chart showing occurrence.
  o The “Minimal List of Required Elements” will be Appendix I.
  o Amy will change references to the “Minimal List of Required Elements” from
    Append. E to Append. I on p. 9 of the Intro in the Content Guidelines.
  o Linda will add a statement specifying these are the elements in alpha order that
    appear in the content guidelines, not the complete tag library.
  o Cara will cross check to verify there are content guidelines for all elements in E1.
Cara and Toni will write an intro statement providing the context for the Minimal Required Elements Chart. The chart will appear in the Starter Kit without the asterisks and bold type at the bottom of the page.

While working on this section, Linda found the Content Guidelines were missing pages for three elements.
- **Amy** will write Content Guideline page for the *Creation* element
- **Linda** will write page for *Language Usage*
- **Amanda** will write page for *Title Proper* of the Finding Aid

Remove subtitle element in the example finding aid since it is not consistently used throughout the finding aid.

Cara said the KSU systems staff asked why we didn’t write content guidelines for author of the finding aid. We decided to put it in the template, but not create a content guideline page for it.

- Appendix G --Formatting and Linking Attributes:
  - **Linda** will add Dao and expansion
  - **Amy** will double check for elements that Linda noted as missing and add them.

- Appendix J --Tagged Structure/Outline of Encoded Finding Aid:
  - **Amy** will remove `<frontmatter>` section since it will be automatically generated
  - Add intro statement on what it is and its purpose

- Add Appendix K: Selected Bibliography and Web Resources

Order of the Appendices will change to:
A. List of all elements with occurrence (was E)
B. Minimal Required Elements (was I)
C. Structure/Basic Outline of an Encoded Finding Aid (was J)
D. Formatting and Linking Attributes (was G)
E. Using LISTS (was D)
F. Encoding Analog Mappings and Examples (was B)
G. Recommended Controlled Vocabulary Lists (was C)
H. Allowable Forms of Natural Language Dates (was F)
I. Securing a Repository ID (was H)
J. EAD Finding Aid Examples (was A)
K. Selected Bibliography and Web Resources (addition)

Starter Kit:
**ACTION ITEMS for Toni and Cara:**
- Add a statement to the intro explaining that a web form will be developed which will make it possible to simply cut and paste or type content of a finding aid into the form without hard encoding the tags.
- In Introduction, move Barbara S. to Advisor
- Revise the Starter Kit by Wednesday, April 19, and **Toni** will bring copies to SOA to hand out at the presentation.
- The Starter Kit will be available in PDF and HTML formats. **Toni** will send out a message to the SOA listserv after SOA conference, DMS list, and OhioLINK list.

**Glossary:**
A discussion on whether or not we need a glossary yielded the decision to forego work on it until the guidelines have been distributed for comment. If requests are made for a glossary, we will develop one at that time.

**Distribution of Content Guidelines:**
Target date is May 1st.
We will also distribute them to the DMSC list.

**Agenda Item 3: Toni, Linda, and Dianna: Update on SOA Presentation**

The three of us met after the meeting, and will use the outlines prepared by Amanda, Dianna, and Cara for ALAO. We will create a PowerPoint presentation and coordinate through e-mail.

**ACTION:** Amy will run XML Kivist finding aid through DLXS for a text version and give to SOA presenters to show.

**Agenda Item 1.: Cara’s Report on meeting with KSU Systems Department**

The systems people asked:

- Why aren’t all the elements in our Content Guidelines? If elements are excluded does that mean they cannot be used? We addressed this earlier in the meeting by putting a scope statement into the intro of the Content Guidelines.

- Use of `<c>` versus `<c0x>`. We are recommending the numbered components. **ACTION:** Change `<c>` in the Content Guidelines to `<c0x>`, and be sure to explain that the number depends on how it is nested.

- Why is there no guideline for author? As discussed above, we decided there is not a specific need for content guidelines for it, but it will be in the web form.

- Are we allowing for mapping to Dublin Corp? Yes.

- They recommended we have an outside consultant look at content guidelines. We are concerned we will get personal preferences in light of the range of flexibility EAD offers. It was agreed that distribution to DMSC, and the Society of Ohio Archivists listserv accomplishes the goal of outside and relevant feedback.

- How does the project fit into DRC? Possible component of DRC, but we don’t know the future of DRC. Since Fedora is not working, a DLXS driven site would enable us to move ahead with the project.
• How will we deal with multiple files containing confidential information?
  Have institution put confidential info into local maintenance file for the collection.
  Archivists ToolKit would facilitate this.

• How will we allow for the flexibility of more high-end encoding by participating
  institutions?
  We will offer them a NoteTab template where they can go in and work with the
  XML, and provide a validation tool.

• KSU is experienced in developing custom applications and are interested in working
  on a web application and want to know the best process to proceed with that. The TF
  was impressed with their questions and interest. Amy and Amanda will meet with
  them while we are at KSU for our next Task Force meeting in June.

Agenda Item 4: OAC Web Template Presentation by Amy, and Future OhioLINK EAD
Web Form

• OAC had used DLXS, but now they use a program they developed on their own.
  Amy showed us the templates online, which each institution could configure for their
  own needs. This is what we hope to do.

• A question came up as to whether one can start filling in the web form, save, and
  return later to finish it.

• We looked at some EAD finding aids in DLXS hosted on OhioLINK’s server.

• Both release 12 and 11 of DLXS support unitdate nested in unittitle only.
  When release 11 came out, Sheila modified the cgi code to support the separation of
  unittitle and unitdate.

  For release 12, Sheila has: (1) modified xslt to support the separation, and (2)
  made this an enhancement request to DLXS for which they have acknowledged.
  Sheila is not sure whether it is going to be a standard in the next release or
  not, nevertheless it is an easier task.

ACTION ITEMS: Changes to DLXS:

  • We can change the names for any of the tags. We’d like to change “Scope
    Note” to “Content”.

  • We would like the side bar to be static while scrolling down through the
    finding aid.

  • Amy will ask Sheila to do two versions of the finding aid display: one will
    have the title followed by a comma and the date; while the other version will
    have the box and folder information above the title and date.
o DLXS 12 requires unitdate to be separate from unittitle, while version 11 required unitdate to be nested within unittitle. We decided we will continue to keep them separate.

o Item level descriptions display blank space where titles should be.

o We need two way directional links on pages with DAO linking because DLXS links to the object server (which is OSU’s server in this instance) and the only way to get back to the finding aid on OhioLINK’s server is by the back button.

o Amy will ask Sheila if OhioLINK would host all the images.

o Amy will give KSU a narrative description of issues with DAO linking for consideration with the web template.

Web Form Element.doc:

**ACTION ITEMS:**
- We will write specifications for our web form detailing what we want the application template to do. We will discuss this at our June meeting, and give it to the KSU systems staff.

- In the meantime, Cara will show the systems staff the OAC templates, and the web form element document for an idea of where we would like to go.

- Amy and Amanda will meet with the KSU systems staff on the day of our June meeting to discuss development of the web form template.

- At the June meeting Linda and Amanda will present a mock up of our web form template.

Training:

**ACTION:** Amy will ask OhioLINK how they will support training financially, before we proceed on developing training ideas beyond the starter kit. Ideally we would like to develop ideas for in person training, and web tutorial training.

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Next meeting: June 21, 2006 at Kent State University.

Minutes Submitted by Toni Jeske.