Meeting was called to order at 10:40 A.M.

Location: OhioLINK

Present: Janet Carleton, Cara Gilgenbach (cochair), Anne Gilliland (OhioLINK), Toni Jeske (cochair), Beth Kattelman, Amy McCrory, Rhonda Rinehart

Application changes

- Concerns and feedback from last meeting’s component level introduction have been addressed.

- Collection level changes include:
  - Menus have been changed
  - Controlled Access Headings and Lists are no longer a two-step process
  - Lists are optional
  - Help link icon is now located at beginning of each Application section rather than after clicking on “edit”
  - Controlled Access Heading description field is now a repository preference, but it was suggested that it should have some default text or pop-up to guide users

Amy suggested the difference between “creation” and “encoder” should be explained. Ideas include either a pop-up explanation or a default setting to the EAD Application.

Application testing

Amy presented two finding aids tested with feedback from experienced and inexperienced encoders in her institution. She agreed to send the typewritten information to the entire Task Force. Overall feedback was good, especially from the experienced encoder. Some immediate areas of concern:

- The use of the Edition field; a “help” icon will be added to explain its use
- Origination field issues; a MARC encoding help icon is needed
  - Beth suggested setting up repository preferences for preferred terminology
  - Cara suggested eliminating “added entry” and change to “repository preferences”
• Other repository preferences could be Preferred Citation text, Physical Extent; Cara asked Task Force members make a list of other possible repository preferences

TF members agreed it would be helpful to include examples rather than extensive explanations for the “help” icons.

• Editor field concerns:
  ▪ Need to explain the differences between “title” and “emphasis” choices in style drop-down box; people don’t realize that “title” is actually encoding the information as a title, not just changing format of text
  ▫ One solution was to replace the eraser with icons and provide help information for what the title choices mean

• Other areas of concern from Amy’s institutional testing:
  ▪ EAD Header section needs explanation
  ▫ Amy suggested creating a list of items in an EAD header as a possible solution

Completion of Component Level Application

• continuing to make changes
• getting component level where it needs to be
• developing Links and Digital Archival Objects tags

Changes to Starter Packet

• add a URL of a sample EAD finding aid
• include a section discussing what happens after creation of a finding aid
• add Beth’s and Amy’s edits to the Minimally Encoded Finding Aid document and include the Finding Aid Evaluation Worksheet

Element Pages

• Toni suggested another workday for those who are working on further development of the element help pages
• will also work on how to handle Links and Digital Archival Objects (will possibly link to individual servers and keep the images with the host institution)

Component Level update

• Cara hi-lighted Dave’s changes and additions:
  ▪ repository preference to display box and/or folder numbers
  ▪ shortened unit title to save space and say on one line; hover gives entire title
- eliminated group/sub-group level; now defaults to collection level and
  the hierarchy can be seen there
  - suggestion was made for drop-down boxes for container type
    choices
  - Cara suggested mapping out the series first, then filling in the
    levels rather than trying to fill in levels immediately after each
    series; this should make it easier to keep track of where you are
    in the hierarchy

**Search Engine update**
Anne Gilliland updated the TF on Sheila’s work with the XTF search engine

- there should be a separate XTF instance for EAD testing
- process should be completed in late October; should have something ready for
  Beta testing by then
- there are two phases of this process: testing and development and matching output
- testing of the searchability of an EAD finding aid on another server will be
  helpful

**Links and DAO**
Amy reported on her work and testing of the Links and Digital Archival Objects links for
the Application

- encouraged to make any links x-link compliant which requires more detail
  - DTD with simple link won’t work in schema
  - to make x-link compliant, need three components:
    - Role (what is role of the link?)
    - Show (new or imbed)
    - Actuate (automatic or on request)
- the question is, how much do we want to make possible? Non-imbedded images
  are easier to deal with
- Amy was in favor of simple links, but this could have later consequences in terms
  of how much the links will be able to do
- Cara brought up the issue of link changes and how to change the URL in the
  finding aid if it does change (each institution could be responsible for keeping the
  links current)
- which parts of the Application will support these links?
  - Cara noted two options for DAOs: creating a link next to the title OR
    the title of that item and the link both go the appropriate image
  - contentDM can be used if the URL doesn’t change
  - Amy will put the code together, then Sheila and Amy will test Dave’s
    data
Meeting adjourned at 3:05 p.m.

Respectfully submitted by Rhonda Rinehart