OhioLINK DMSC  
EAD Task Force  
Meeting Minutes  
Feb. 21, 2007

Location: OhioLINK

Present: Janet Carleton, Anne Gilliland, Beth Kattelman, Cara Gilgenbach (Co-Chair), Toni Jeske (Co-Chair), Rhonda Rhinehart, Amy McCrory

1. **Introductions**
The meeting began with introductions and a welcome to new members of the Task Force.

2. **Review Charge for Year 3 of the Task Force**
The TF will continue to develop and test the web application, test and suggest changes to the XTF search interface, generate marketing and training ideas for the Ohio repository, and keep DMSC members apprised of our work.

3. **Work Plan Through Early Spring:**
Cara, Amy and Toni will continue working with Dave Gaj on the development of the application. The collection level portion of the application will be deliverable by end of February /early March. Since Dave won’t be able to work on the application during March, Amy, Cara and Toni will work out component level specs during that time and give them to Dave by late March.

Janet, Rhonda and Beth will focus on testing the application and the XTF search interface. They will use that experience to generate training and marketing ideas. Comments on the application and XTF should be sent to the EAD TF list at ead@ohioloink.org. Sheila Yeh is on this list and will see the comments. Any issues for Dave Gaj will be forwarded to him.

4. **Summary of Work Completed on EAD Application and Demo of Application:**
Cara reported that the collection level part of the application is near completion. Amy, and Cara have been working with Dave Gaj at KSU on technical issues with the application since December, and Toni joined discussions in January. Cara demonstrated the application, and the new TF members were excited about the progress, user friendly template, and functionality of the application.

The following points were addressed:

- Because EAD allows great flexibility, the TF consciously decided to limit what we allow to the most commonly used elements. We want to deliver a simple and broadly applicable tool. We will have to decide if we will accept enhancement requests in the future and how that process will work.
The resulting XML code is clean

TF is recommending using the application in Firefox, which works best.

Ideally institutions will be able to contribute their existing EAD finding aids to the repository, as long as they validate against the DTD. Is this a policy issue?

Controlled Access Headings section needs to be a little more intuitive and change the source default from “local” to blank, and move LCSH and local to the top of the drop-down menu.

Work is underway on the display of the validation report. Checking/validation on the fly is preferred, to eliminate most problems up front.

Need to find a way to allow for DAOs. The XTF search engine doesn’t create <dao> links yet, but will. Dave knows we need to have a way to handle <dao>s.

Investigate if institutions could put a persistent link in the catalog record to the finding aid in the shared repository.

Work to Do:

- Cara will set up individual accounts for the new TF members to log into the application.

- All members will continually test the application and send comments to the EAD TF list at ead@ohiolink.edu. We can attach lengthy comments as a Word document in an e-mail. Especially comment on elements that would be commonly used in multiple sections of the finding aid (for example, lists can occur in bioghist, scopecontent, etc.).

- Continue updating collection level specifications to reflect changes and additions (i.e. MARC encodinganalogs), and updating the sample finding aid XML and Word versions.

- Develop specs for component level.

- Create a **Wish List** for requests beyond the TF charge right now. Include:
  - HTML conversion script for institutions wanting to put the finding aid on their local web site.
  - Script to convert legacy HTML finding aids automatically to EAD finding aids.

5. **Demo of XTF Search Interface**

Amy demonstrated the XTF Search Interface. Amy sent 2 pages of issues to Sheila, and we’ll keep adding to the list. No customization to the interface has been made yet.
Desired Changes:

- Include repository name as a search delimiter
- Make [clear hits] option more obvious (this clears red highlighting of search terms and the “jump to” arrows)
- Once the finding aid is displayed, make it more obvious that the search box at the top searches WITHIN the finding aid (as opposed to across finding aids)
- Box and Folder columns are too wide
- Add a “back to search results” button. Right now you have to use browser’s back button.
- Links to <dao>s aren’t there, nor extended reference links.
- Box and folder lists are displayed in a table format with columns. Amy proposed a block format to reduce file size and load time. She will send TF members an example.
- XTF loads the entire finding aid versus targeted sections of the finding aid. Could it be configured to just load the applicable part of the finding aid? For large finding aids, it just loads what it can and then cuts it off. Options might be to divide large finding aids into separate files with the option to download the entire finding aid. Another option is to create pdf files of container lists and link to them.
- Can XTF provide printer friendly versions of the finding aids? Institutions would likely want a print copy of their finding aids for their reading rooms. Preference is to have a link to a printable pdf. Another possibility is to allow the finding aid to be downloaded so the user could see how big the file is and print accordingly.
- We want to have capability of searching on:
  Subject
  Genre/format
  Names
  Dates
  Places
  Occupations

For Further Discussion:

- Terms in the subject drop down box can be customized with terms. Anne said it can’t be done without creating a list of XTF set of control access headings and making people choose a term in the list to put in their finding aid’s controlled access headings. This would need to be part of training. We would need a process for people to submit new terms for the list. Janet suggested we find out how often the browse function on the Ohio Memory site is used. Explore how e-books does this.
Amy will send issues from this meeting to Sheila.

Cara pointed out that repositories should be told that publishing their finding aids will likely increase reference demand. Amy said a note in <userestrict> can notify patrons that requests would be answered in a given time period. (Include in training)

Beth asked if the application and XTF are 508 accessibility compliant. Anne said OhioLINK is aware of that, but is not at that point in testing. Cara said she would ask Dave about the application’s accessibility compliance.

Idea was raised of having a contact person to field questions about FERPA issues, etc. related to using the repository.

6. **Upcoming Meetings**
   We agreed to meet the 3rd Wednesday of every other month at OhioLINK. Anne booked the room for our meetings on:
   - April 18
   - June 20
   - August 15
   - October 17
   - December 3rd to report to DMSC.

7. **Archon Discussion:**
   We decided we need to be prepared as a TF to respond to questions about Archon, the administrative archives tool put out by University of IL-Champaign Urbana. No one on the TF has downloaded the application. We will make a comparison between Archon and our work. We agreed the most notable difference is our content guidelines, which creates standardization and allows for predictable and precise searching.

8. **Content Guidelines:**
   Amy will extract the first 14 of the 189 pages of the Content Guidelines and the appendices except for appendix J. This will encourage more people to read the CG. When the application is closer to completion, we will pare down the Content Guidelines by stripping out the subelements, but keeping the definition, MARC and DACS mappings, occurrence, and possibly a plain text example. In the meantime, we will put a note on the CG web site to the effect that the CG are in the process of being updated and condensed. In the meantime, be sure to point people to the starter kit.

Minutes submitted by Toni Jeske on February 26, 2007.