1. **Demo of HTML finding aids created from EAD documents (OSU)**

Amy McCrory showed a selection of EAD finding aids converted to HTML from several OSU collections. Traditional manuscript collections and a literary manuscript collection in which the finding aids were coded to mirror the format of the print version were included.

Several issues were brought up regarding the display of finding aids. First, OSU uses the SAA stylesheets which create frames. Barbara Strauss commented that sometimes it is hard to print from frames. McCrory responded that a link to a “printer friendly” version of finding aids would resolve that problem.

Examples shown:
   i. [http://www.lib.ohio-state.edu/speccoll/finding/LandL.html](http://www.lib.ohio-state.edu/speccoll/finding/LandL.html)
   ii. [http://www.lib.ohio-state.edu/speccoll/finding/eisner.html](http://www.lib.ohio-state.edu/speccoll/finding/eisner.html)
   iii. [http://www.lib.ohio-state.edu/speccoll/finding/ecms60.html](http://www.lib.ohio-state.edu/speccoll/finding/ecms60.html)

Other aspects of EAD discussed included: the flexibility of component levels (e.g. a `<c03>` could represent a subseries in one series and an item in another within the same finding aid); whether to assign numbers (<c01>, <c02>, etc.) to components or rely exclusively on level attributes (level=”series”, level=”file”, etc.); the optional need for item level description; and consideration for handling large finding aids (e.g. a 4 megabyte HTML file).

2. **DLXS**

Currently, OhioLINK is pursuing the use of DLXS, an e-books software application, for search and delivery of finding aids using its finding aids class. Linda Cantara suggested looking at Indiana’s finding aid repository for an example of live use of DLXS with EAD ([http://www.letrs.indiana.edu/web/f/findaid/archives/index.html](http://www.letrs.indiana.edu/web/f/findaid/archives/index.html)). Examining a few finding aids revealed the advantages of have two styles of finding aids (frames and non-frames versions) and demonstrated the search capability of Indiana’s implementation of DLXS.

Strauss asked for clarification on how a search engine for EAD works. A search engine enables focused search of a finding aid or series of finding aids by indexing specific tags within an EAD document. When live, a search engine may highlight search terms in context and offer both simple and advanced search capabilities.
OhioLINK’s implementation of DLXS is still in development and is using a sample of EAD finding aids from OSU:
http://magenta.ohiolink.edu:8080/cgi/f/findaid/findaid-idx?c=osu;cc=osu;page=simple

One problem with DLXS is its handling of containers which will be different among repositories (e.g. some may want location listed, others may want box and folder, and still others may want only folders listed). OhioLINK has also successfully experimented with using reference images in finding aids. As many institutions may want to include images with their finding aids (called digital archival objects or <dao>s in EAD) several questions were raised: 1) Where will the digital archival objects be stored? at OhioLINK? at owning institutions? and 2) What about image formats? Should the OhioLINK or the task force recommend a standard? Does addressing format issues fall within the scope of our charge? Encoding and displaying EAD finding aids for literary manuscripts, which often require different types of descriptive elements, may warrant consideration as we develop guidelines.

3. Other Projects

The group looked at the Denver Public Library’s EAD Project site (http://eadsrv.denver.lib.co.us:8080/sdx/pl/?l=en) to look at the PLEADE software and search capabilities. PLEADE (www.pleade.org) was developed specifically for EAD. The group discussed differences between DLXS and PLEADE. The possible need for using frontmatter to format a title page for each finding aid was also discussed. Through the use of frontmatter, institutional branding in OhioLINK’s repository can be addressed.

The group also looked at the Online Archive of California’s (www.oac.cdlib.org) finding aid delivery system. OAC formerly used DLXS; however, the repository has moved to a locally developed system.

4. Compare finding aids

Each of the institutions present shared examples of their finding aids (HTML or print). All are listed below with workflow, background, and other aspects of the projects that the task force should take into account.

**Cleveland Memory Project (Cleveland State)**
www.clevelandmemory.org
-- database output of container lists
-- special collections head wants to move toward EAD

**4 May 1970 Collection (Kent)**
-- collection of collections
-- basic structure of HTML finding aids; HTML tags do not specify types of data, so conversion to EAD may require sophisticated scripting
-- linked photographs to finding aid
-- Hundreds of HTML finding aids
-- lots of generations of description and descriptive tools
-- during the past few years, standardization is being imposed on finding aids
-- some finding aids have folder level description, some item level description

**MS-1 Wright Brothers Collection (Wright State)**
-- HTML finding aids
-- Most in electronic form with standard sections
-- Introduction section of each finding aid contains access and use restrictions as well as other administrative information

**Case Western Reserve University (Kelvin Smith Library)**
-- Some paper finding aids
-- Some finding aids in HTML which are more like online exhibits
-- University Archives are considering using EAD
-- Cantara is training cataloger to convert to EAD (cataloger is the person who created the web exhibits)
-- Not a large number of actual collections in Kelvin Smith Library

**University of Akron (Archives of the History of American Psychology)**
Many of Akron’s finding aids are not in electronic form and need to be rekeyed in order to encode in EAD. Divergent descriptive practices have been used over the years, so legacy finding aids present challenges in harmonizing the different styles for EAD standardization.

Different institutions have varying workflow processes that may affect development of the guidelines. Some used graduate students, others catalogers, and still others volunteers. Also, guidance on planning ahead to create EAD finding aids when processing new collections would be beneficial.

**Notes on aspects of EAD discussed throughout the meeting include:**
-- archdesc and dsc elements
-- Box and folder number listed
-- EAD is trying to move from tying information to container to conceptually thinking about the collection
-- Scope notes, and certain other elements, can appear at any level of the finding aid (collection to series to item)
-- Tag for format called genreform, handles both genre and format, which allows some fluidity in defining material types
-- How do you handle subjects? Do not have to use standard forms, but can create local authorized list and through NoteTab Pro or other software can provide a drop-down box

**Some future needs that emerged from the discussion of institutional policies and finding aids are as follows:**
-- Conversion from HTML to EAD (automatic or semi-automatic)
-- PHP or other scripting may be needed to output container lists stored in databases
-- Mark up of print documents
-- Mark up of native electronic documents (e.g. Word, WordPerfect, etc.)
-- Education on information needed for EAD (ideas: query form that can be translated into data; worksheet used to gather (or attempt to gather) information when processing a collection)
   Possibilities: NoteTab, XForms, web forms
   Considerations: what type of space at OhioLINK are we talking about? A little or a lot?
-- Vetting process?
-- How to move ahead – planning when processing new collections
-- What to do for those finding aids that are not suitable for EAD – (idea: top level description and link to scanned text and/or link to request of photocopy for print)
-- Provide utility from OhioLINK that corrects entities in documents?
-- What do DLXS and PLEADE require in terms of c levels—level attribute only, or numbers?

4. RLG BPG review -- shaping our guidelines
The group examined RLG’s Best Practices Guidelines introduction and beginning of the elements section.

5. Update on Archivists’ Toolkit
Cara Gilgenbach reported on information she found about the Archivist’s Toolkit Project: The project is grant-funded and is intended to facilitate all aspects of processing an archival collection. The project proposal is informative and ambitious and helped to inform thinking about the task force’s purpose. No tools have been developed at this point, but reading the project proposal will be helpful for informing our “Why EAD” document.

Next Steps:
1) Amy will send link to OhioLINK DLXS server
2) Cara will send link for Archivist’s Toolkit
3) Read archivist’s toolkit and begin revisions to “Why EAD” document via listserv
   a) Keep in mind: creating finding aids is helping researchers to find materials to support their research.
   b) It is important to stress that increased requests will from internal and external users will result from putting finding aids on the web.

Next meeting is at OhioLINK in April 13, 2005:

Possible agenda items include:
-- DACS report
-- Mark-up a legacy finding aid
-- Define scope (What is our scope and goal? Guidelines? Guidelines and tools? Tell people what tool(s) to use? Preferable choice is the latter)

Peter Murray will be our guest for the meeting.

02/14/05 AJW; corrected 2/14/05