2007 has been a year of tremendous productivity for the Task Force, especially in its creation of the EAD encoding application and extensive progress made on development of the Finding Aid Repository and search engine. The following report is submitted to the Database Management and Standards Committee and outlines the accomplishments of and work completed by the EAD Task Force during 2007. It also includes ongoing projects and objectives for the coming year.

2007 Task Force members: Janet Carleton; Cara Gilgenbach (co-chair); Beth Kattelman; Amy McCrory; Rhonda Rinehart; Toni Vanden Bos (co-chair)

Part I: 2007 Accomplishments

1. EAD Application (encoding tool)
   Working in partnership with Kent State University Libraries and Media Services’ (KSU LMS) Systems staff, full development of the Web-based EAD encoding tool (EAD Application) was completed this year. The development team was comprised of David Gaj of KSU LMS Systems, who served as the programmer, and members of the Task Force. Detailed specifications were prepared to form the basis of the programming. Once the basic Application was created, alpha testing took place over an extended period. All members of the Task Force participated in Application testing, producing a great deal of feedback on functionality and technical issues. This initial testing was followed by an extension of testing that included at least one additional staff member from each Task Force member’s home institution. Expanded testing resulted in a number of suggested modifications and improvements to be made to the Application. The goal was to have version 1.0 developed in time for the ALAO conference in October. That goal was met, and the Application was debuted at the conference to an audience of 26 session attendees. Following this, beta testing began on November 16th, with a cadre of 33 testers signed up, many of whom attended the ALAO presentation. The testers come from varying institutional types and also include some Kent School of Library and Information Science students.

2. Search Engine and Finding Aid Repository Development
   After testing three possible search engines in 2005 and 2006, the Task Force chose XTF in 2007. XTF is free, open-source software designed by programmers at the California Digital Library, and is used to search finding aids in the Online Archive of California. During 2007, the Task Force has had detailed discussions about configuring the software for use with EAD at OhioLINK, leading to a set of recommendations to be implemented by Sheila Yeh, OhioLINK Senior Systems Developer, who has previously configured XTF for the OhioLINK Electronic Books Center. These include specifications for the advanced search interface and the search engine output.

   The Task Force collectively drafted recommendations for a gateway page for the EAD Finding Aid Repository, along with a simple search page to be designed with a format similar to that of the Electronic Books Center. OhioLINK’s John Davison is designing these pages.

   The Search Engine and Repository will undergo user testing in December 2007 and January 2008.

3. Content Guidelines and Element Help Pages
   As work progressed on both the EAD Application and Finding Aid Repository, the Task Force realized that its initial version of OhioLINK EAD Content Guidelines and the EAD element pages that had been created earlier, would need to be revised to reflect the functionality of these tools. It was also determined that these documents needed to be simplified by removing xml tagging and other highly technical data they originally contained. A wholesale revision of
the EAD element pages was completed. These pages now function as “help pages” when linked to from the EAD Application. The Content Guidelines document and the Ima R. Kivist model finding aid were also revised in their entirety. These very time-consuming and detail-laden efforts were completed at the same time as the Application, Search Engine/Repository, and the ALAO conference presentation were still being developed. The revised Content Guidelines and help pages are accessible at http://silver.ohiolink.edu/dms/ead/contentguide/index.html.

4. EAD Starter Packet
The EAD Starter Packet, developed in 2004 and 2005 by the Task Force was also in need of extensive revision this year. New sections were added, information about the EAD Application and Search Engine were included, and other sections were edited for currency. The revised Starter Packet is also available at the Web site noted in number 3 above.

4. Outreach and Training Program Development
The Task Force has engaged in some outreach this year including posting an announcement on its progress in the Society of Ohio Archivists and Midwest Archives Conference newsletters. The group also submitted and had accepted a presentation proposal for the ALAO conference this past October. The presentation was considered a success with more attendees than anticipated and generally very positive feedback and initial reaction to the EAD Application and Repository/Search Engine which were demonstrated in the presentation. In the meantime, later in the year, the Task Force began to devote more attention to the development of a training program to be implemented starting in 2008 (see Part II, item 4 for more information).

Part II: Work in Progress

1. Beta Testing of the EAD Application
Beta testing of the EAD Application is slated to continue into January, though a final termination date has not yet been set. Following this round of testing, it is likely that further revisions will be made to the Application. The projected goal is to have the Application available for public use in March 2008. Authentication and registration procedures are currently being worked out with OhioLINK staff. KSU LMS will continue to host the Application site, but a new url (using “ohiolink.edu”) will be established for this tool.

2. Creation of OhioLINK EAD Gateway Site
The Task Force has recommended that an OhioLINK EAD Gateway Web site be created that would serve as the main site for EAD initiatives, tools, information, and contacts within OhioLINK. This site would include links to the EAD Application, the Finding Aid Repository and Search Engine, the EAD Content Guidelines, and other information related to EAD implementation.

3. Finding Aid Repository and Search Engine
The Task Force has made recommendations regarding the Finding Aid Repository to be hosted at OhioLINK, including:

- Creation of repository accounts
- User authentication
- Information for repository profiles
- Creation of account administrator at each repository

Upcoming developments include joint implementation, between OhioLINK and KSU LMS Systems, of a system for transmission of EAD finding aids from the EAD Application to the OhioLINK Finding Aid Repository.

Modification of the XTF search engine interface and output continues. When the Task Force’s final changes have been implemented, the Application beta testers will be asked to test and comment on the search engine. Their comments will be reviewed by the Task Force, and implemented as appropriate. We expect to complete this process at the end of January 2008.
4. Training Programs
In anticipation of the release of both the Application and Repository early next year, the Task Force has now turned its energies to the development of training programs and outreach ideas so that these resources can be successfully used by OhioLINK members and other Ohio institutions. At its final 2007 meeting, the Task Force generated a number of concrete ideas for training, including face-to-face training and programs delivered over the Web. A team was formed to investigate online/Web-based training, while others members will focus on producing a model in-person training session. Venues, logistics, handouts, and other details of training were also discussed. A potential partnership with the Society of Ohio Archivists to provide a pre-conference training session at the annual SOA conference is currently being explored. The Task Force plans to work with OhioLINK to identify venues in various areas of the state, and will also rely on OhioLINK to assist with publicity for the training program. Task Force members indicated a strong commitment to actively develop the online training program and to provide training sessions in person as well.

Part III: Request for Extension and 2008 Goals
Task Force goals for 2008 are based largely on continuing to meet components of the group’s initial charge, building on our work of this past year, and developing a multi-faceted training and outreach program.

Major goals for 2008 include:

1. Implementing public release of the EAD Application and Finding Aid Repository (and search engine)
2. Developing and offering initial training programs
3. Continuing outreach to OhioLINK member institutions and archival repositories (of varying types) throughout the state of Ohio

A primary Task Force’s objective since its inception is to avoid losing momentum on primary initiatives. With significant accomplishments made in 2007, it is felt that in order to ensure the successful implementation of EAD in OhioLINK, the Task Force must be continued. Current Task Force members have indicated their willingness to continue serving in 2008.