OhioLINK Database Management and Standards Committee
EAD Task Force

Final Report

November 14, 2006

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 its initial two-year charge period. Work remaining to be done is also outlined. Also included are recommendations for training and marketing initiatives to encourage and support the implementation of a state-wide EAD finding aid repository. Finally, requests for an extension to the Task Force’s charge as well as the appointment of additional personnel are made.

This report was compiled by the active members of the Task Force as of November 2006: Amy McCrory (chair), Linda Cantara, Dianna Ford, Toni Jeske, and Cara Gilgenbach.

Part I: Progress to Date

1. Content Guidelines

In February, 2006, the TF submitted draft content guidelines. The content guidelines include a definition, occurrence (required, recommended or optional), mapping to MARC field and DACS rule, and encoded examples for the most relevant EAD tags for Ohio's archival community. The draft content guidelines were well received by DMSC. TF members revised the guidelines in response to recommendations. After another review and revision, the TF posted the content guidelines in both HTML and printable pdf formats online for comment from the archival community.

2. Information Web Site at OhioLINK

In June, 2006, the Task Force created a web site hosted by OhioLINK at http://platinum.ohiolink.edu/dms/ead/contentguide/. The web site contains a starter packet of information to help Ohio archival institutions prepare themselves and their finding aids for participating in the OhioLINK statewide repository of archival finding aids. In addition, the site contains the content guidelines in both HTML and pdf versions., and a blog to gain feedback. The blog has not generated feedback as hoped, and has been removed. The Task Force promoted the web site and asked for feedback on the OhioLINK list and also the Society of Ohio Archivists listserv.

3. Application Specifications

The Task Force is grateful to the Libraries Systems professionals at Kent State University, who have offered to program the web based EAD Application. The Task Force met with the programmers in June to discuss the vision and information they needed from the Task Force in order to begin work. Task Force members developed specifications for the web
applications covering modules for the registration process, top level (collection) description elements, validation, and submission to OhioLINK. In October, Amy McCrory and Cara Gilgenbach discussed the specifications with the programmers, who were pleased with the level of detail and planning by the Task Force. The programmers requested clarification in some areas, and raised questions for the Task Force to consider. The Task Force is continuing discussion with the programmers via e-mail as clarification is needed or issues arise. Programming began in October, 2006. In November, Task Force members began writing specifications for the component-level portion, which are slated to be completed by January, 2007.

4. Search Engine Development

In 2006, Sheila Yeh extensively tested encoded finding aids with DLXS and PLEADE software. However, XTF software has recently proven to have advantages. Sheila is recommending the XTF software over DLXS and PLEADE.

**Part II: Work Remaining**

1. Completion of EAD Application

KSU Libraries Systems professionals are in the process of creating the programming for the collection-level portion of the EAD Application, based on the specifications written by EAD TF members. EAD TF members are writing specifications for the component-level portion, to be delivered to KSU Libraries Systems upon completion; the programmers will incorporate this portion into the existing Application.

2. Development of search engine

Having tested two search engines—DLXS and PLEADE—Sheila Yeh and Amy McCrory are ready to test and develop OhioLINK’s newly adopted open source software, XTF. The ability to change the configuration and display of finding aids is considered essential in creating a product that libraries and archives in Ohio will want to use. Therefore, Sheila and Amy will be exploring the extent to which XTF software allows such changes. EAD TF members will evaluate results and make recommendations.

3. Testing of the Web-based EAD Application

Once the EAD Application is completed, thorough testing will be necessary. The EAD TF has access to a number of finding aids, written in various styles, with which to test and judge its usability. The group will assess output, make recommendations for improvements, and revisit the Content Guidelines document to determine whether edits to them will be needed.

Once testing by EAD TF is done, there is an opportunity to combine testing of the Application with training of a limited number of practitioners from Ohio libraries and archives. A selected group of archivists could try out the template, reporting any errors or difficulties they encounter, and at the same time learn how to use it to make their finding aids available in the OhioLINK EAD Repository.

Further recommendations for training are provided in the next section of this report.
Part III: Proposals for Training

During the course of the initial two-year charge, the Task Force has prepared online training materials, including the OhioLINK EAD Content Guidelines (PDF with HTML to follow by the end of 2006) and the EAD Starter Packet (PDF). Both of these documents are available from the OhioLINK EAD Repository Content Guidelines web site at <http://platinum.ohiolink.edu/dms/ead/contentguide/>.

Once the Web-based EAD Application has been completed, testing of the Application with training of a limited number of practitioners from Ohio libraries and archives will be required. This may require setting up focus groups who can 1) test the software and 2) share their new expertise with other librarians and/or archivists in their home regions.

In addition, the Task Force recommends the following:

1. Training session(s) at OhioLINK: These sessions could be broadcast and video taped for distribution throughout the state. If needed, regional onsite training sessions should also be considered.

2. Training listserv: A listserv needs to be set up for OhioLINK EAD content developers to share questions, comments, and concerns. Task Force members would play an important role in troubleshooting problems content developers may encounter.

3. Archivist Advisory Group: The formation of an Archivist Advisory Group, comprising archivists and other professionals familiar with archival description, will be essential to reply to finding aid development questions from practitioners.


5. EAD Consultant: OhioLINK should consider hiring an EAD Consultant to lead training and technical efforts after the Task Force is no longer active.

Part IV: Marketing

During the past two years, the Task Force has, on several occasions, made efforts to publicize the work we were undertaking in order to benefit from feedback from the archival community. Through presentations at ALAO and SOA and messages posted to the OhioLINK and SOA (Society of Ohio Archivists) discussion lists we have seen the enthusiasm with which this work is welcomed and received helpful feedback on more technical aspects of the project.

In the process of completing the Web-based EAD Application another marketing push should be introduced. It would be a good idea to follow-up with the marketing we have already done, i.e. ALAO, SOA, OhioLINK subscribers, etc. In addition to that, it would be a good idea to contact some additional groups such as OPLIN, OPC (Ohio Preservation Council), and MAC (Midwest Archives Conference) in order to increase exposure to the greatest number of people who would be interested in the service.

The general marketing plan would be as follows:
1. Provide Q & A sessions at the annual meetings for ALAO and SOA as a follow-up to the presentations that were made at each group’s annual meeting last year.

2. Send out messages on the SOA and OhioLINK discussion groups reminding people to read over the Starter Packet shortly before the Web Interface is completed.

3. Give a presentation regarding the project at the Midwest Archives Conference (MAC)

4. Post information regarding the project on discussion groups for the OPLIN and the Ohio Preservation Council (OPC).

5. Give presentations describing the project to the MLIS students at Kent State University and Ohio State University.

This plan would serve to provide updates to those people who have already heard about the project as well as targeting some people who probably have not heard about it yet. We could particularly target public librarians, archivists from small institutions, and new professionals that are likely to be unfamiliar with the project.

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**Part V: Request for Extension and Additional Personnel**

Building on the foundational work the Task Force has completed during its initial charge, we are requesting an extension of at least one calendar year to continue focused work on the following major tasks:

1. Development, testing, and implementation of the Web-based EAD Application

2. Training and marketing of the Application and the Content Guidelines to the OhioLINK community and beyond

The Web-based EAD Application is currently under development. The programmers need intelligent and meaningful input from and dialogue with the Task Force in order to develop a tool that will function within the consortial setting and according to the Content Guidelines. Members of the Task Force have completed the collection-level specifications for the application, and are working on component-level specifications; approximately three months will be needed for this part, so completion of this phase of development is dependent upon an extension of the Task Force beyond December 2006.

If an extension is approved, the Task Force also requests that additional personnel be appointed to its ranks. Some members are no longer able to serve and, while a core group of members is able to continue to serve, additional people will be needed, especially to provide leadership for outreach and training initiatives. Task Force members are ready to submit names of potential new members to Anne Gilliland for her consideration.