Summary of RLG EAD Advisory Group Best Practices for EAD
The following guidelines, which I originally wrote in 2002, are based on the Research Libraries Group Best Practices Guidelines for Encoded Archival Description. The required elements are built into the encoding templates I created for OSU Libraries Special Collections in 2002-2003. In 2004, after testing OSUL finding aids with DLXS through OhioLINK, I added some elements which are required by DLXS. These are noted as “May 2004 update.”

Definition of <eadheader> and <archdesc>
These are the main parts of an EAD finding aid. The <eadheader> contains information about the finding aid. The <archdesc> contains information about the collection. An optional element, <frontmatter>, is used to format a title page.

May 2004 update: DLXS requires the <frontmatter> element.

Definitions of terms “element” and “attribute”
An element is a unit of archival description, expressed as an EAD field; it appears in angled brackets, surrounding the relevant text. In this example, a personal name is tagged as <persname>.

<persname>Mary Anderson</persname>

An attribute defines or modifies an element in some way; it appears alongside the element. In this example, the “source” attribute identifies the controlled vocabulary from which the personal name is drawn.

<persname source="lcnaf">Mary Anderson</persname>

About the encodinganalog attribute
The encodinganalog attribute maps an EAD element to its corollary in another encoding or descriptive scheme. The expectation is that <eadheader> elements will be mapped to Dublin Core, since it describes digital objects (i.e. the finding aid itself), and <archdesc> elements will be mapped to MARC or ISAD(G), since they describe collections; but it doesn’t have to be done this way. In “RLG Best Practices for EAD” it is mandatory for certain elements to be mapped to some other standard.

Examples (<unittitle> mapped to MARC, ISAD(G), and Dublin Core):
<unittitle encodinganalog="245$a">
<unittitle encodinganalog="3.1.2">
<unittitle encodinganalog="Title">
Required, Mandatory, or Mandatory-if-applicable elements and attributes in the <eadheader>

Required—required by the EAD DTD
Mandatory—essential for functionality in a union environment
Mandatory if applicable—mandatory if the value of the element is known

<eadid> Must be unique.
Example: rg19944

Attributes:
url (Example: http://dlib.lib.ohio-state.edu/ead/tests/rg19944.html)
countrycode—use ISO 3166-1
mainagencycode—use your Library of Congress or OCLC repository code (if you don’t have one, you can apply for one).

<filedesc> Bibliographic information about the finding aid.
Elements:
<titleproper> (Title of the finding aid, not of the collection)
<author>
<publicationstmt>
  <publisher>, <date>, <address>

Optional elements include the sponsor (e.g. grant funding agency), edition (when substantial changes have been made), series (if the finding aid is part of one), and note (whatever).

<profiledesc> Information about the creation of the encoded version of the finding aid.
Elements:
<creation> Information about the encoding of the finding aid, such as name of encoder, software or conversion process used.
<date>
<language>

Recommended element: <revisiondesc>, with information about any revisions made to the finding aid.
Required, Mandatory, or Mandatory-if-applicable elements and attributes in the <archdesc>

In <archdesc> top-level metadata:

<did> A wrapper element for top-level metadata.

<origination> Names the creator of the collected materials.

<unititle> Locally assigned title of the described materials (as distinct from the title of the finding aid).

<unitdate> Date or dates of a group of materials or an item.

Date attributes:

Normal In order to ensure successful searching in a consortial environment, RLG EAD Best Practices Guidelines recommend that dates be normalized in accordance with ISO 8601. A Perl script to normalize all dates is available.

Example: <unitdate normal="1970-08-24">August 24, 1970</unitdate>
The normalized date is picked up by the search engine; the “natural-language” date is displayed in the finding aid.

Era and Calendar These are new attributes in EAD 2002.

Example: <unitdate era="ce" calendar="gregorian">1917</unitdate>

May 2004 update:
DLXS requires a type attribute for all <unitdate> elements. This specifies whether the dates are inclusive or bulk dates.

Example: <unitdate type="inclusive">1976-1980</unitdate>

A correctly marked up date, incorporating all of the above attributes, would look like:
<unitdate era="ce" calendar="gregorian" type="inclusive" normal="1894/1996">1894-1996</unitdate>
<archdesc> continued

<extent> Extent, a child element of “physical description,” states how much material there is in the collection.

   Example: <physdesc><extent>25 cubic feet</extent></physdesc>

<unitid> The ID assigned to the collection or record group.

   Example: <unitid>rg19944</unitid>

<langmaterial> The primary language of the materials in the collection. Includes <language> child element and ISO language code attribute.

   Example: <langmaterial><language langcode="eng">English</language></langmaterial>

<repository> The name of the repository housing the materials. Includes ISO country code and LOC repository code attributes.

   Example: <repository label="Repository:" encodinganalog="852$a"><corpname>The Ohio State University Cartoon Research Library</corpname></repository>

<scopecontent> A note about the scope of the collection.

   Example: <scopecontent><p>Includes the correspondence, business records, and meeting minutes of the American Chemical Society.</p></scopecontent>

Note: All of these elements are included in OSUL’s EAD templates, with appropriate mapping to MARC 21. Many additional elements are also used; these are just the ones required by RLG’s Best Practices for EAD.

May 2004 update:
DLXS requires the <descgrp> element. It is a wrapper element used in <archdesc>, to group together descriptive elements, such as administrative information, or elements that correspond to ISAD(G) standards, for example. It has not been used up until now in OSUL finding aids, but will be incorporated if Special Collections decides to deliver its finding aids through OhioLINK.
Required, Mandatory, or Mandatory-if-applicable elements and attributes in the <archdesc> subelements, <dsc> and <c>

<dsc> (Description of Subordinate Components):

**Type attribute** Specifcates the type of <dsc>. Can be “analyticover,” “combined,” or “in-depth.” OSUL uses “combined” for all finding aids, and DLXS requires that this <dsc> type be used.

Example: <dsc type="combined"><head>Detailed Description/Box and Folder Listing</head>

<c> (Component. This element is assigned a number according to the level of description it represents, e.g. <c01>, <c02>, <c03>):

**Level attribute**

<did> (Descriptive Identifier) A wrapper element for information like <unittitle>, <unitdate>, <physdesc>.

<unittitle> Formally assigned title of the materials described. Can be assigned to a group of materials (as in a series, or folder containing a several items), or to a single item.

**Note:** <unitdate> is only recommended at the <c> level, not required, but please use it whenever date information is available.

Example:

```
<c01 level="series"><did><unittitle>Photographs</unittitle><unitdate>1900-1915</unitdate></did>
  <c02 level="file"><did><unittitle>Portrait photographs of Polar expedition members</unittitle><unitdate>1910</unitdate>
  </did><c02>
  <c02 level="file"><did><unittitle>Photograph of snow-melting machine</unittitle><unitdate>1913</unitdate>
  </did><c02>
</c01>
```