EAD Assignment, IST628 - Organization and Management of Archival Collections - Spring 2022

Step by step instructions

DO NOT WAIT until the last minute to start this assignment. Allow plenty of time to resolve any problems arising from differences in browsers and operating systems!

If you have questions or problems, please contact me as soon as possible, at **mrrothen@syr.edu** or **315-443-2081**.

A. Get the files you will need

If you haven't already done so, go to Files and Useful Resources and follow the instructions for downloading the files and testing that they have downloaded correctly. **PLEASE DO THIS EARLY IN THE SEMESTER** so that we can address any problems that you encounter.

You should end up with the following five files in a folder:

- `aaa_template.xml` – This is the "skeleton" EAD file that you will fill in with your information about your collection.
- `eadcbs6-su1.xsl` and `su1.xsl` – These style sheets render the EAD into HTML so that it displays nicely in a web browser.
- `eadprint-su.xsl` and `eadprint.css` – This is an alternate style sheet you can try if you want to see a different display, formatted for printing.

B. Create and edit your EAD file

1. Go into the new folder on your desktop created in the previous step.

2. Make a copy of `aaa_template.xml` in the same folder and rename it with your name (e.g. "smith_j.xml"). This is your EAD file.

3. Open your EAD file in a *plain text editor*. DO NOT use Word or OpenOffice or any other word processing software.

   a. Windows users: Right click on your EAD file and choose "Open with > Notepad." If you don't see Notepad as an option, choose "Open with > Choose program" and find it in the list. If you have, or want to download and install, Notepad ++ (http://notepad-plus-plus.org) and use that instead, you may. Notepad++ color-codes the XML and makes it easier to work read/work with (see screen cap below).

   b. Mac users: Your system should have come with TextEdit, but TextEdit doesn't do plain text by default. Please read this article, or the section "Save Files in Plain Text" in this one, for how to configure TextEdit correctly for plain text editing. You can also use TextWrangler if you prefer. If you have, or want to download and install, Atom (https://atom.io) or Brackets (https://brackets.io) and use that instead, you may. Both of these color-code the XML and make it easier to work read/work with (see screen cap below).

Screen cap of color-coded EAD, showing elements (tags) in blue, attributes in red, content in black:

```
<filedesc>
  <titlestmt>
    <titleproper encodinganalog="Title">Frederic a
    <subtitle>An inventory of his papers at Syracu
    <author encodinganalog="Creator">JMB</author>
  </titlestmt>
```

4. Minimize or move the text editor window so it's out of the way.

5. Open your web browser, choose "File > Open File" and open your EAD file again. (Firefox, Safari, and Internet Explorer should all work for this; Chrome will not.) When the file is open in the browser, it should appear as shown in the "Downloading files for your EAD description of your collection" section of Files and Useful Resources. If it does not, let me know as soon as possible so we can resolve whatever the issue is.

6. You now have your EAD file open in two different applications: a browser and a text editor. You will use the text editor one for editing and making your changes; you will use the browser one for viewing your changes.

7. In your EAD file that is open in the text editor, find the title of the collection:
   `<titleproper encodinganalog="Title">Title of Collection (So-and-so's Papers or Records or Collection)</titleproper>`

8. Change it to the name of your collection and **save your changes**:
   `<titleproper encodinganalog="Title">Jane Doe's Star Trek Collection</titleproper>`

9. In your EAD file that is open in your browser, refresh the page (click the "Refresh" button, or right-click/Apple key anywhere on the page and choose "Reload"). You should see the title change to the text you entered.

10. Congratulations! You have just made your first EAD edit. Continue editing the file to reflect the information needed for your collection. Frequently – i.e., after every two or three changes – save your EAD file in the text editor and "refresh" your browser view of the document, so you can see the changes appearing in the finding aid as you make them.

As you do this, you may want to refer to the lecture, and to the EAD 2002 tag library and EAD examples (links in Files and Useful Resources), and to various other references as listed in Useful Links.

C. Fix errors as you go!

If at any point the browser reports an error, it should give you a line number and some idea as to the problem. It might be a missing end tag, or a missing bracket >, or a tag placed where it isn't allowed, or a missing attribute, or a special character such as curly quotes. Go to the line number indicated, look carefully, find the error and fix it. You can go to a specific line number in Notepad by first making sure that Format > Word wrap is unchecked, and then choosing Edit > Go to and entering the line number. In Notepad ++ the line numbers are listed down the left-hand side. TextEdit unfortunately doesn't display line numbers, which is why you should save and refresh after every change. That way if an error shows up, you know to look at the change you just made. It is important to fix errors as they occur, don't wait until you're all done!

If you get an error and can't figure out what's causing it, look at some of our online examples to help you narrow it down, or post a question in BlackBoard. More than 2000 examples are available here:

- [Examples as they look in the browser](#)
- [EAD code for those same examples](#)

You could also skip to Section D and follow the instructions for validating your file, as the online validator will give you very detailed information on errors.

If you make one change but suddenly the browser reports lots of errors, fix just the first error shown, save, and refresh to see if all the errors are gone. Sometimes one error will "cascade" and cause multiple errors to be reported, so one fix will sometimes get rid of multiple errors.

Any sections of the file that are not applicable to your collection should be commented out so they don't show up in the HTML version. Use `<!--` at the beginning and `-->` at the end to comment out, for example:

```
<!-- <accruals encodinganalog="584">
   <head>Accruals</head>
   <p>## OPT (MARC 584)</p>
</accruals> -->
```

My contact info is mrrothen@syr.edu or (315) 443-2081 – feel free to get in touch with me if you are having problems with your document.

D. Validate your EAD file

When your finding aid is complete and you're happy with it, you will need to VALIDATE it against the EAD DTD as follows:

1. Go to http://validator.w3.org/
2. Click on the third tab, "Validate by direct input."
3. In Notepad, select the ENTIRE DOCUMENT (either ctrl-A or Edit > Select All).
4. Copy (either ctrl-V or Edit > Copy)
5. Paste the text into the text box in the Validator and click the large button that says "CHECK."
6. If you get a green bar that says it has validated – great! If you get a red or yellow bar with errors, click on "Jump to Validation Output" at the top and it should explain the errors.
7. If there are any errors, the validator will tell you what they are and the line number. Fix the errors in your Notepad file, recheck in the browser, then recopy the file into the validator's text box, and recheck.
8. If you get lots of errors, fix just the first one in your EAD file, then repeat the copy/paste and validation steps. Sometimes one error will cause multiple problems, and fixing one error will remove several itemized problems.

Submitting your file

When you are done with your file, follow the instructions in Blackboard to submit your assignment.

Grading

Your finding aid will be graded on (a) <u>validation</u>: whether it validates against the EAD DTD (so don't skip step D above!); (b) <u>coding</u>: whether you have included all required/relevant elements and attributes, such as the `@NORMAL` attribute for dates, and (c) <u>content</u>: whether you have put the right content in the right elements, included appropriate information at each level of description, made good choices for your `<controlaccess>` terms, and so on.

Useful references

Remember, both [Files and Useful Resources](#) and [Handy Links](#) contain links to a number of useful references for this assignment, including the EAD tag library, the Art and Architecture Thesaurus and more. I strongly encourage you to use those resources as you work on your EAD finding aid.