

EAD Assignment, IST628 - Organization and Management of Archival Collections - Spring 2023

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 three 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-sul_full.xsl` – This style sheet will render the EAD into HTML so that it displays nicely in a web browser.
- `eadprint-su.xsl` – This is an alternate style sheet that will render the EAD into a more stripped-down 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 and go to the Finding Aids Test page:
https://library.syr.edu/digital/guides/lavender/student_files/test2.html .
6. Next to "XML Source File" click "Browse" and select your EAD file, the one you just created in Step 2 above. Next to "XSLT style sheet" click "Browse" and select the file eadcb6-sul_full.xsl that you downloaded above. Click "Run XSLT." The file 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. (If you want to try a different style file, reload the page and this time for the XSLT choose eadprint-su.xsl. Then click "Run XSLT" and see what happens!)
7. You now have your EAD file open in two different applications: (1) a browser and (2) a text editor. You will use the text editor for editing and making your changes; you will use the browser for viewing your changes.
8. 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>
9. Change it to the name of your collection and **save your changes**:
<titleproper encodinganalog="Title">Jane Doe's Star Trek Collection</titleproper>
10. In your EAD file that is open in your browser, refresh the test page as follows:
 - a. Click the "Refresh" button, or right-click/Apple key anywhere on the page and choose "Reload"). The rendered finding aid will disappear.
 - b. Next to "XML Source File" click "Browse" and re-select your EAD file, and then click "Run XSLT." The title should change to the text you entered. (Note: Even if your EAD file name is displayed next to the "Browse" button, you still have to click "Browse" and re-select your EAD in order for your changes to show up.)
11. 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 as described in step 10, so you can see the changes appearing in the finding aid as you make them. This is very important, as it will help you find and fix errors as you go along.

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 gives you an error, or the text simply does not display when you click "Run XSLT," go back and look closely/carefully at the last change you made, and see if you can find the error yourself. 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 or the ampersand &.

If you can't figure out what's causing the error, 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](#)

If you still can't figure it out, skip to Section D and follow the instructions for validating your file. The online validator will give you very detailed information on errors including specific line number(s). 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 doesn't display line numbers, but you can go to a specific line number by hitting Command+L to open a "Select Line" dialog. (This also lives under the "Find" sub-menu.)

Whatever you are using, it's an EXCELLENT idea to save your file and refresh the view in the browser after every change. That way if an error shows up, you know it came from the change you just made. It is important to fix errors as they occur -- don't wait until you're all done!

Also, note that sometimes one error will "cascade" and cause multiple errors to be reported, but one fix will sometimes get rid of multiple errors. So if the validator reports lots of errors, focus on fixing the first one and then re-validate to see if that also fixes all the others.

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> -->
```

It's better to comment out than to delete, because you may discover later that you actually do need that section of code; in that case just un-comment it (remove the comment indicators) and you can use it.

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. You can also validate it at any point to help you locate errors. To validate, do as follows:

1. Go to <http://validator.w3.org/>

2. Click on the third tab, “Validate by direct input.”
3. In your text editor, select your 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 EAD file in your text editor, recheck it in the browser, then repeat steps 1-5 above.
8. If you get lots of errors, don't panic!! Sometimes one error will "cascade" and cause multiple problems, but you only need to fix the first one and the others will go away. So focus on fixing just the first reported error in your EAD file, then repeat steps 1-5 above.

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) validation::; (b) coding: and (c) content::.

Validation: 50% - Does your file validates against the EAD DTD? (So don't skip step D above!)

Coding: 25% - Have you included all required/relevant elements and attributes, such as the @NORMAL attribute for dates? Have you appropriately used separate elements for separate pieces of information? Have you structured your inventory section correctly?

Content: 25% - Have you put the right content in the right element? Have you included appropriate information at each level of description? Have you made good choices for your <controlaccess> terms?

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.