How to create an EAD finding aid (in XMetaL)

Creating Finding Aids in XML (XMetaL)

Background to EAD and the XMetaL Template

EAD, or Encoded Archival Description, is a standard for encoding finding aids for use in an online environment. Schlesinger's EAD documents are encoded in XML, or Extensible Markup Language, and are formally defined by a schema, or rules file. To facilitate markup, the library uses an XML template and a macros file created in-house. The schema is adapted and maintained by Harvard's LTS. Finally, the library uses a style sheet created by the University Archives, which determines how documents look during creation on the cataloger's computer. Once posted to OASIS and HOLLIS, the look and style of our finding aids is determined by the OASIS style sheet.

All finding aids are created using XMetaL, an XML editor, in which documents can be seen in three "views." The first, "plain text," shows the XML tagging in its most basic form. In this view, it is possible to erase parts of tags, which makes documents invalid. Due to the high possibility of mistakes, this view should only be used when specified. In the second view, "tags on," XML tags appear as bubbles, which cannot be edited. Whenever a tag is created in this view, both the start and end tags are creating, ensuring that all tags are valid. All work on finding aids should be done in this view, unless specifically stated. The final view is the "normal view," which displays finding aids without any tags visible. This view should be used only for printing.

Adding tags to finding aids is fairly simple in XMetaL. Make sure to have the "Element List" and "Attribute Inspector" turned on (found on the toolbar under View). The Element List contains a set of elements that can be added depending on where the cursor is located in the finding aid. To add tags to a finding aid, click the appropriate tag from the element list and either double click or click "Apply." One can also highlight the item in the document, choose the appropriate tag from the element list and click to add the tag; XMetaL will automatically insert the tag around the highlighted text.

Some EAD elements are further described, or made more specific, by attributes. These attributes are included inside the tags for the element. For example, the EAD element personal name can be made more specific to indicate that the name being described inside the tag is the processor of the collection (<persname role="processor">). To assign attributes in XMetaL, click after the opening tag. The tag will appear in the box of the Attribute Inspector. A list of permitted attributes will appear below. Click the box to the right of the appropriate attribute and either choose the term from the drop down list or type it in.


Setting up XMetaL

As part of a computer refresh or version upgrade, you will need to add files to your computer to in order to use EAD documents. Those instructions are here.

As of July 2018, Schlesinger is using the LC EAD Schema. See here for transforming old EAD files.

Beginning A Finding Aid

- From G:\SCHLES\COLLECTION SERVICES\MANUSCRIPTS\XML\ArchivesSpace\SLASEAD Xlinktemplate.xml
- Right click and scroll down one line to "Edit in XMetaL."
- XMetaL will launch with the template open.
- Save the file to the "U" directory (your personal drive) with a new file name, using either the MC#.xml or the name of the collection (e.g., pruitt.xml).

Always use the "Tags On" view to prevent deleting portions of tags.

The following section discusses some of the tags that must be "filled in" by catalogers when marking up of finding aids. Tags are listed in the order that they appear in the template. If any questions arise about mark up, consult the Metadata Specialist (Paula).

Call Number <unitid>

The call number tag should include all call numbers. When there are multiple call numbers, they should be separated by a semicolon (;). For example: MC 535; T-332; DVD-5; MP-52; Phon-44

Author <origination>

This tag identifies the author of the collection. You must use the authority heading.

- Headings for personal names should be in indirect order (last name, first name) and include any life dates.
- If the author is a corporate body, be sure to change the tagging from <persname> to <corpname>. Corporate names should include any qualifiers.
- If the author is a family, be sure to change the tagging from <persname> to <famname>

Title <unittitle>

While DACS rules dictate separating the collection date from the collection title, display in ArchivesSpace makes it difficult to differentiate between results when the dates are removed from the title. To aid in searching, we are including the dates in the <unittitle> for the time being. This also allows for a more user friendly expression of date information including qualifiers such as bulk, inclusive, or approximate. Once processing is completed and the HOLLIS record has been updated, the 245 and the title in the finding aid must match.

245 00 $kPapers of M.F.K. Fisher,

$11860-1995 (inclusive),
$g1929-1992 (bulk).

[appears in finding aid as]:


Dates <unitdate>

Enter the collection dates in the appropriate <unitdate> tag, and normalize the dates.

- DO not include any punctuation (commas or periods) after dates or any text (approximate, inclusive, bulk, etc.).
- "Normalizing" consists of adding the attributes "type" and "normal" to the unitdate tag.
  - For the type attribute, select either the "bulk" or "inclusive" value.
  - For the normal attribute, use a single date, or give the date range separated by / (1900/1950).
- For each date or date range, you must use a separate <unitdate> tag.

The most common types of dates are marked up below. For other types of dates, see the Metadata Specialist (Paula).

EXAMPLES:

Date span: 1900-1950

  <unitdate normal="1900/1950" type="inclusive">1900-1950</unitdate>

Date span, bulk and inclusive dates: 1860-1989 (inclusive), 1900-1950 (bulk)

  <unitdate normal="1860/1989" type="inclusive">1860-1989</unitdate><unitdate normal="1900/1950" type="bulk">1900-1950</unitdate>

Broken date span: 1900, 1950-1989

  <unitdate normal="1900" type="inclusive">1900</unitdate><unitdate normal="1950/1989" type="inclusive">1950-1989</unitdate>

Approximate dates: a certainty attribute is added to approximate dates.

- Certainty must be assigned to the entire date range, not just the begin or end date.
- Approximate dates are now normalized based on the known dates without the five year buffering on either side.

ca.1849-1963

  <unitdate calendar="gregorian" certainty="approximate" era="ce" normal="1849/1963" type="inclusive">1849-1963</unitdate>

Physical Description and extent <physdesc><extent>

List both linear feet, and the number of file boxes, oversized folders, oversized boxes, etc.

- Put the space occupied extent (usually linear footage) inside one <extent> tag
  - NOTE: extent types in the first <extent> tag must be on the Harvard approved extent types list: Harvard ArchivesSpace approved extent types.docx
- Put the container summary (list of container types) inside a second <extent> tag
- DO NOT include spaces at the start or ends of extent inside of <extent> tags as this will cause problems with ArchivesSpace ingest.
- If your collection doesn't include electronic files, delete the second <physdesc> tag from the template

In general, there are three types of extent expressions:

1. Collections with a single space occupied extent (generally linear footage, with a container summary)
2. Collections with a space occupied extent representing the whole collection (linear footage with container summary) and a space occupied extent for part of the collection (megabytes/gigabytes with container summary)
3. Collections with multiple space occupied extents representing parts of the collection (generally a/v collections)

These different extent expressions require separate tagging:

Extent expression type #1 (linear feet with container summary) example:

  <physdesc altrender="whole"><extent>28.98 linear feet</extent><extent>(69 + 1/2 file boxes), plus 1 folio folder, 2 folio+ folders, 1 oversize folder, 2 supersize folders, 5 photograph folders , 2 audiotapes, 13 videotapes, 1 CD, 1 photoCD, 8 objects</extent></physdesc>

Extent expression type #2 (linear footage with container summary AND megabytes with container summary) NOTE the extent expressions are in separate <physdesc> tags with attributes specifying "whole" and "part":

  <physdesc altrender="whole"><extent>10.8 linear feet</extent><extent>(26 file boxes) plus 1 folio+ folder, 1 photograph folder</extent></physdesc>

  <physdesc altrender="part"><extent>4.16 megabytes</extent><extent>(36 files)</extent></physdesc>

Extent expression type #3 (a/v collection) NOTE the extent expressions are in separate <physdesc> tags with attributes specifying "part":

  <physdesc altrender="part"><extent>78 motion pictures</extent></physdesc>

  <physdesc altrender="part"><extent>404 videotapes</extent></physdesc>
<physdesc altrender="part"><extent>1 DVD</extent></physdesc>

Physical Location <physloc>
Use this field if the collection will be stored at the Harvard Depository. If it will be onsite, do not use the field (delete from the template).
EXAMPLE:
<physloc>Collection stored off site: researchers must request access 36 hours before use.</physloc>

Language of Materials <langmaterial>
Use "Materials in English" unless there is a significant amount of material in another language.
<langmaterial>Materials in English.</langmaterial>
<langmaterial>Most material in English; some correspondence in German.</langmaterial>

Abstract <abstract>
Include brief description of collection creator and summarize the types of material present in the collection.
EXAMPLE:
<abstract>Correspondence, writings, and other papers of author and food writer, M.F.K. Fisher.</abstract>

Processing Information <processinfo>
Fill in month and year processing was completed.

- As of June 2018, we are no longer marking up the processor name in a <persname> tag. If the tag is present in your finding aid, please remove it.
- As of September 2018, we are no longer marking up the processed date in <date> tags. If the tag is present in your finding aid, please remove it.

Example:
<processinfo><p>Processed: December 2016</p><p>By: Laura Peimer, with assistance from Margaret Dalton.</p></processinfo>

Provenance And Donor Information <acquinfo>
Include a brief statement about donors in the provenance paragraph.

- As of June 2018, we are no longer marking up the donor as a <persname> or <corpname>. If the tag is present in your finding aid, please remove it.
- As of September 2018, we are no longer marking up the accession numbers in <num> tags. If the tag is present in your finding aid, please remove it.

Access statement <accessrestrict>
Record any restrictions on the collection. Delete irrelevant data from template statement.

Example:
<accessrestrict><head>Access Restrictions</head><p>Access. Collection is open for research.</p></accessrestrict>

Add separate <p> for specific restrictions. Be sure to clarify restrictions imposed by the donor.

Copyright statement <userestrict>
Update copyright and copying statements in template. Be sure to delete irrelevant data.

Example:
<userestrict><p>Copyright. Copyright in the papers created by Elizabeth Moulton is held by Henry H. Moulton. Upon his death, copyright descends to Peter H. Moulton. Upon the death of Peter Moulton, copyright will be transferred and assigned to the President and Fellows of Harvard College. Copyright in other papers in the collection may be held by their authors, or the authors' heirs or assigns.</p>
<p>Copying. Papers may be copied in accordance with the library's usual procedures.</p></userestrict>

Preferred Citation <prefercite>
The template provides the basic citation form (Collection Name Papers, dates: item description, dates. Collection #, folder #. Schlesinger Library, Radcliffe Institute, Harvard University, Cambridge, Mass.) Processors should provide the

- Collection name
- Collection dates (inclusive only)
- Collection #
- If necessary, also change papers to records.

EXAMPLES:
Related Material <relatedmaterial>

Use this tag to list collections with related content, provenance, or creators. In the past, we referred to these collections in the scope and content note. As of January 2014, we will list them in a related material tags.

As of September 2018, we only use the <relatedmaterial> to reference related materials. Prior to September 2018, <relatedmaterial> was used to reference materials not related by provenance, while <separatedmaterial> was used to reference materials with the same provenance. If your finding aid contains a <separatedmaterial> tag referencing related materials, please change the tag to a <relatedmaterial> tag. The <separatedmaterial> tag is now only used for materials which the processor has decided to separate from the processed collection and transfer to the library’s in-house book collection or another institution.

If possible, the processor should provide a link to the related material. If the material is at Schlesinger or elsewhere at Harvard, use theURN or thepermalink. You can find the URN or thepermalink in the HOLLIS record for the collection to which you want to link. Technically, older finding aids have both a URN and permalink. Always use the URN if one is available.

To link to a MARC record in HOLLIS+, use the link contained in the HOLLIS+ Permalink field (example: http://id.lib.harvard.edu/aleph/008357586/catalog).

EXAMPLE:

There is related material at the Schlesinger Library; see Gerda Lerner papers, 1955-1995 (75-37--96-M8; T-238), and Papers of Gerda Lerner, 1924-2006 (MC 498; T-492).


Biography/History <bioghist>

This section contains the biographical or historical note.

- The template contains the word "biography" in the header. If the collection is an organization's records, change the header to "history."
- All paragraphs in this section must be wrapped in <p> tags. HINT: To start a new paragraph, place cursor at the end of the last paragraph (inside the </p> tag) and press "enter."
- Due to ingest issues with ArchivesSpace, do not use <chronlist> in the <bioghist>

Arrangement Note <arrangement>

Describe the series arrangement of your collection in the arrangement note.

DO NOT list any levels of description below the series.

EXAMPLE:


Scope & Content Note <scopecontent>

Include a general description of the scope and content of your collection followed by series and subseries descriptions.

- All paragraphs entered in this section must be wrapped in <p> tags. HINT: To start a new paragraph, place cursor at the end of the last paragraph (inside the </p> tag) and press "enter."
- DO NOT mark up dates in the scope and content as this will cause problems with ArchivesSpace ingest

Microfilm <altformavail>

When collections are microfilmed, a section is added to the finding aid containing microfilming instruction and a guide to the microfilm reels. The information is wrapped inside the alternative form available <altformavail> tag. This section is inserted between the </scopecontent> and the <dsc> tag.

EXAMPLE:

<altformavail>
<head>MICROFILM OF COLLECTION</head>
<p>The following information applies to all the collections included in this microfilm project.</p>
<li></li>
</altformavail>
2. The pages of some items were numbered to aid the microfilmer, the proofreader, and the researchers. Blank pages were not numbered.

3. All reels were proofread by the processor and corrections were made where necessary. These corrections may disrupt the sequence of frame numbers.

For a list of the contents of MC 332 see the inventory that follows. For descriptions of A/B274, A/M256 and A/M537, see the card catalog or the inventory that precedes each of these collections on reel 6. When requesting microfilm material, please use the microfilm number (M-88) and the reel number.

REEL GUIDE

Folders 1-14: M-88, Reel 1
Folders 15-30: M-88, Reel 2
Folders 31-39: M-88, Reel 3
Folders 40-48: M-88, Reel 4

Acronyms List

In the past, finding aids containing a large number of acronyms should included a list with their full names spelled out. Currently, we make every effort to not use acronyms in finding aids; documentation exists in this manual as it was a common practice in our early finding aids. If acronyms are removed from an older finding aid, the list should be retained as the processor may have used the acronym in folder titles or elsewhere within the physical collection. There is no EAD tag for acronyms lists, so the information must be entered in an <odd> tag, which is used when there is no appropriate EAD tag available. This section is inserted between the </scopecontent> and the <dsc> tag.

EXAMPLE:

```
<odd><head>LIST OF ACRONYMS</head>
<list>
  <item>AACIC: Association for Advancement of CIC (established 1938 to act as liaison between CIC and Chinese government)</item>
  <item>CIC: Chinese Industrial Cooperatives</item>
  <item>CNRRA : China National Relief and Rehabilitation Administration</item>
  <item>IC : International Committee (based in China, coordinated international funding for CIC; established 1939 at the request of oversees committees to receive their funds) </item>
  <item>ICO : International Committee Office (re: CIC/Indusco)</item>
  <item>Indusco : American Committee in Aid of the CIC</item>
  <item>PUMC : Peking Union Medical College</item>
  <item>SRR : Shanghai Refugee Research</item>
  <item>UCR : United China Relief</item>
  <item>UNRRA : United Nations Relief and Rehabilitation Association</item>
</list>
</odd>

Container List

Older finding aids with continuous folder numbering should contain a container list, which serves as a key to which folders are in which box.

Example:

```
<odd><head>Container list</head>
<list>
  <item>Box 1: folders 1-10</item>
  <item>Box 2: folders 11-20</item>
</list>
</odd>
Inventory <dsc>

This section lists the content of the collection. Collections may contain simple lists of materials or hierarchical list (series, subseries, etc.).

Components <c>

All levels of description in the inventory have the same basic tagging: <c><did><unittitle> TEXT HERE</unittitle><did></c>.  

- Levels of description are defined using attributes (c level=).
  - Folders, items, audiotapes, etc are defined as <c level="item">
  - Series are defined as <c level="series">
  - Subseries are defined as <c level="subseries">

- Once a finding aid is ingested into ArchivesSpace, its components will be assigned a component id.
  - These ids are unique and cannot be duplicated within a finding aid.
  - Components with ids can be deleted from finding aids with no impact.

Nesting Elements

Proper mark up of descriptive levels relies upon the proper nesting of elements. The close of each element is defined by </c>. In order for an item to be associated with another element, it must be inside of the other element's </c> tag.

For instance, the tagging for a series is: <c level="series"><did><unittitle>Series I. BIOGRAPHICAL AND PERSONAL</unittitle><did></c>, and the tagging for a folder is: <c level="item"><did><unitid>1.1.</unitid><unittitle> Obituary, 1965</unittitle><did></c>. If the folder is part of Series I, the entire folder tag must be inserted between the </did> and the </c> tags of the series. The tagging would be as follows: <c level="series"><did><unittitle>SERIES I. BIOGRAPHICAL AND PERSONAL</unittitle><did><c level="item"><did><unitid>1.1.</unitid><unittitle> Obituary, 1965</unittitle><did></c></did></c></c>

In XMetaL, it is possible to incorrectly nest elements. In the "normal" view, elements that are nested together line up with each other. If elements are not lining up as expected, there is an error in the nesting. In the "tags on" view, count the number of </c> tags at the end of the section being marked up. The last folder inside of the last subseries should have three </c> tags, 1 for the folder, 1 for the subseries, and 1 for the series.

Folders, Volumes, Objects, Audiotapes, Etc.

All types of items listed (file folder, oversized folders, memorabilia, audiotapes, etc.) are marked up using the same format: <c level="item"><did><unitid>x.</unitid><unittitle> TEXT HERE</unittitle><did></c>. The contents of the <unitid> tag may contain any form of number (1.1, F+1, Mem.1, T-23.1, etc.).

EXAMPLE OF FOLDER:
<c level="item"><did><unitid>1.1.</unitid><unittitle> [Background/biographical information], 2001, n.d. </unittitle></did></c>

EXAMPLE OF VOLUME (SCRAPBOOK):
<c level="item"><did><unitid>4FB.1. </unitid><unittitle> Scrapbook [clippings, April 1944 - May 1945]. Green scrapbook compiled for Coyne by Bost on Herald editor George Minot. Re: German economy, food shortages, Nazis in Norway. </unittitle></did><accessrestrict>ORIGINAL CLOSED; USE ON HERALD #2.7-2.9. </accessrestrict><odd><p>Loose photograph and notes removed, see #1.16.</p></odd></c>

EXAMPLE OF OVERSIZED FOLDERS:
<c level="item"><did><unitid>FD.1. </unitid><unittitle> Artwork, 1936 </unittitle></did></c>

EXAMPLE OF AUDIOTAPE:
<c level="item"><did><unitid>T-219.1. </unitid><unittitle> Radio program hosted by Tobias re: 25th anniversary of 1963 Atmospheric Test Ban Treaty and role of women who formed Women Strike for Peace, August 3, 1988; includes interviews with Dagmar Wilson, founder of Women Strike for Peace, and Amy Swerdlow, a participant in the movement. ca.60 minutes </unittitle></did></c>

EXAMPLE OF VIDEOTAPE:
<c level="item"><did><unitid>Vt-77.3. </unitid><unittitle> "Quest for Peace," Sheila Tobias interview, with John Whiteley of University of California Irvine, 1984. 30 minutes </unittitle></did></c>

Series, Subseries, And Cumulative Headings

Use the Series macro (Ctrl, Alt, S) to create Series headings. Below are the basic tagging for a series, subseries, and cumulative heading. All of the contents of a series, subseries, or cumulative heading must be entered between the </did> and the </c> of the series, subseries, or cumulative heading. Please note that the cumulative heading is a discontinued practice; documentation exists in this manual as it was a common practice in our early finding aids.

<c level="series"><did><unittitle>Series I. BIOGRAPHICAL</unittitle><did></c>
<c level="subseries"><did><unittitle>Subseries A. Resumes</unittitle></did></c>
<c level="otherlevel" otherlevel="cumulative"><did><unitid>5-20m: </unitid><unittitle>Cicero Washington Pruitt (CWP)</unittitle></did></c>

The contents of series, subseries, and cumulative heading tags may be marked up
<c level="series"><did><unittitle>Series IV. <title>GREAT DAY COMING</title></unittitle></did></c>
Using <Scopecontent> Notes Within The Inventory Section

A scope and content note can be included at the series, subseries, or folder level.

Series or subseries scope and content notes go between the series/subseries </did> and the begin <c> of the first folder.

FOR EXAMPLE:

```xml
<c level="subseries"><did>
<p> Series IV. MEMBERSHIP, 1978-2005 (#49.11-49.12, 75.9-75.10, 78.1-85.9, 86.1-88.9, 89FB.1-90FB.6, 91FB.1-91FB.3, 92CB-96CB), includes membership processing manuals, correspondence with data management system vendors, membership data entry instructions, membership rosters, membership statistics, etc. Also included are direct mailings (mostly photocopies) containing membership and financial solicitations, as well as correspondence and reports analyzing the effectiveness and documenting the scope of direct mail distribution. Many of the reports in this series were generated from NOW's data management system and include information labeled using system source codes, translations of which are generally not included in this collection. Files containing member names or financial information are closed for 50 years from latest date in folder. Direct mail (#86.1-88.9) is open, without written permission, to all researchers. Files are arranged alphabetically.</p>
</scopecontent>
```

Description of the contents of a folder or a piece of media should be entered into a scope and content note (<scopecontent>) in the item listing, rather than being included in the unit title (<unittitle>). Item level scope and content notes go between the </did> and </c> of the listing. Example:

```xml
<c level="item"><did><unitid>49.11.</unitid><unittitle>American Management Systems, copies [of statistics, orders, memos, etc.] for bill, 1983 <
/unititle></did></c>
```

Describing physical aspects of items

Descriptions of audiovisual materials and objects should contain information about the physicality of the carriers or objects. Information relating to physical aspects of an item should be entered in a <physfacet> tag nested inside of a <physdesc> tag.

The following data that should be in a <physfacet> tag:

- The type of audiovisual carrier
- The length of a recording
- Statements concerning recording quality
- Statements regarding irrelevant content on a carrier
- Notes concerning blank space on carriers
- Description of the physical appearance of an object

Audiovisual example:

```xml
<c level="item"><did><unitid>T-537.16.</unitid><unittitle>New York Society of Women in Philosophy (SWIP) meeting, November 18, 1994. <
/unititle><physdesc><physfacet> Audiocassette. ca.30 minutes. Side 2 blank. </physfacet></physdesc></did><scopecontent><p>Atkinson's notes on content: "SWIP-nominations business meeting, 11/18/94 [colloquium: Virginia Field's paper]."</p></scopecontent></c>
```

Object example:

```xml
<c level="item"><did><unitid>3.2-1m.</unitid><unittitle>Michigan Womyn's Music Festival patch, 1985. <
/unititle><physdesc><physfacet> Round white patch with maroon embroidered festival logo in center and maroon embroidered text over logo, "M.W.M.F. 1985 Family." White embroidered edges. </physfacet></physdesc></did></c>
```

Macros

Macros have been created as shortcuts for frequently used strings of tags and phrases. After positioning the cursor in the correct place, macros may be accessed from the macros toolbar by selecting the appropriate macro and hitting the green arrow (run), or by using key strokes:

- Ctrl, Alt, S inserts all of the tagging associated with a Series: `<c level="series"> <did> <unittitle> TEXT HERE </unittitle> </did> </c>`
- Ctrl, Alt, B inserts all of the tagging associated with a Subseries: `<c level="subseries"> <did> <unittitle> TEXT HERE </unittitle> </did> </c>`
- Ctrl, Alt, F inserts the tagging for a Folder: `<c level="item"> <did> <unitid> x </unitid> <unittitle> TEXT HERE </unittitle> </did> </c>`
- Ctrl, Alt, N inserts the tagging for a Note: `<odd> <p> TEXT HERE </p> </odd>`
- Ctrl, Alt, P inserts the tagging and language for a Photograph reference for multiple photographs: `<odd> <p> Includes reference copies of photographs; original in #. </p> </odd>` [this practice is not currently used]
- Ctrl, Alt, O inserts tagging and language for a Single Photograph reference: `<odd> <p> Includes reference copy of photograph; original in #. </p> </odd>` [this practice is not currently used]
Ctrl, Alt, C inserts tagging and language for a **Cumulative Heading**: `<c level="otherlevel" otherlevel="cumulative"><did><unitid>x:x!<unittitle>TEXT HERE</unittitle></did></c>`

Ctrl, Alt, A inserts tagging and language for **restricted material**: `<accessrestrict><p>TEXT HERE</p></accessrestrict>`

Ctrl, Alt, H inserts tagging for a folder which contains one photograph removed from the preceding folder: `<c level="item"><did><unitid>x.</unitid><unittitle>Photograph removed from #</unittitle></did><odd><p>FILED WITH PHOTOGRAPHS.</p></odd></c>`

Ctrl, Alt, I inserts tagging for a folder which contains multiple photographs removed from the preceding folder: `<c level="item"><did><unitid>x.<unittitle>Photographs removed from #</unittitle></did><odd><p>FILED WITH PHOTOGRAPHS.</p></odd></c>`

Ctrl, Alt, D inserts tagging needed for a **digital object**: `<dao xlink:show="new" xlink:actuate="onRequest" xmlns:xlink="http://www.w3.org/1999/xlink"><p>TEXT HERE</p></dao>`

Ctrl, Alt, E inserts tagging needed for a **scope and content note**: `<scopecontent><p>TEXT HERE</p></scopecontent>`

Ctrl, Alt, M inserts tagging needed for a folder with AV or memorabilia: `<c level="item"><did><unitid>x.</unitid><unittitle>TEXT HERE</unittitle></did><physdesc><physfacet>TEXT HERE</physfacet></physdesc></c>`

Ctrl, Alt, V inserts tagging needed for a folder with AV or memorabilia and a scope and content note: `<c level="item"><did><unitid>x.<unittitle>TEXT HERE</unittitle><physdesc><physfacet>TEXT HERE</physfacet></physdesc><scopecontent><p>TEXT HERE</p></scopecontent></c>`

**Tagging Within An Element**

As of Fall 2010, we will no longer mark up words and phrases within an element for search purposes. There are a few exceptions, such as `<title>` tags, and these exceptions are noted throughout this chapter.

**Titles `<title>`**

Mark up titles of published works but do **NOT** put punctuation within the `<title>` tags unless it is part of the title. Using the `<title>` tag makes titles appear in italics online. For titles in quotation marks, simply type quotation marks around the title; **DO NOT** use `<title render="doublequote">`.

**Access Restriction `<accessrestrict>`**

Information regarding access to materials, including both statements concerning restrictions and those denoting that materials are open, should be tagged with an `<accessrestrict>` tag at **ALL** levels of the finding aid. You must include a `<p>` tag inside the `<accessrestrict>` tag. EXAMPLES:

```
<c level="item"><did><unitid>28.12.</unitid><unittitle>[Interview transcripts: Pincus, Jane], 1995. </unittitle></did><accessrestrict><p>REQUIRES WRITTEN PERMISSION OF INTERVIEWEE.</p></accessrestrict></c>
```

```
<c level="item"><did><unitid>x.</unitid><unittitle>Membership. Orlansky. Membership reporting forms used prior to 1978, ca.1971-1977.</unitid><accessrestrict><p>OPEN FOR RESEARCH.</p></accessrestrict></c>
```

**Notes `<odd>`**

Phrases in the folder list that begin with: PHOTOGRAPHS, SEE ALSO, etc., should be tagged as `<odd>` as they do not describe the contents of the file unit. The `<odd>` should also be used to indicate that an item is missing (include the date the item was discovered have gone missing, i.e., **MISSING AS OF SEPTEMBER 2016**).

Use of the `<odd>` tag puts this information on a separate line from the file unit title. Place the cursor between the `<did>` and the `<c>` tags and insert `<odd><p>` tags (use macro Ctrl, Alt, N). Multiple notes should be included within one note tag and each note should be wrapped in its own `<p>` tag.

**Additional Catalog Entries `<controlaccess>`**

This section, usually referred to as "added entries," falls after the `<dsc>` tag but before the `<archdsc>` tag.

Each entry must have a tag around it. Do not using tags within tags as this causes problems with ArchivesSpace ingest. A person's dates are included in the `<persname>` tag and subject strings (e.g., American literature--20th century) are included in a single `<subject>` tag.

EXAMPLES:

```
<persname>Aiken, Conrad, 1889-1973</persname>
```

```
<persname>Honey, Frank, 1925-, interviewee</persname>
```

```
<persname>Atlas, James</persname>
```

```
<genreform>Account books</genreform>
```

```
<subject>American literature--20th century</subject>
```

```
<corpname>Cabot family</corpname>
```

```
<corpname>International Childbirth Education Association, Inc.</corpname>
```

For form and genre headings used at Schlesinger, see G:\SCHLES\COLLECTION SERVICES\formgenre terms used at Schlesinger.doc.
As of 2015, the library is discontinuing its convention of categorizing the added entries as "Authors" and "Subjects."

ONLY USE THE FOLLOWING tags in <controlaccess>: <corpname>, <famname>, <genreform>, <geogname>, <persname>, <subject>. All other tags will result in data loss on ingest into ArchivesSpace.

In April 2017 we agreed to match the order of added entries in the finding aid to the Marc field order in Aleph. Therefore, please order your added entries by Marc field (600, 610, 650, 651, 655) and alphabetically WITHIN each field.

Correspondence Index <odd>

Place the Correspondence Index after the Added Entries, but before the Separation Record. Do not use <persname> or <corpname> tags. (Please note: we are no longer using the <index> tag for Correspondence Indexes). EXAMPLE:

```
<odd>
  <head>INDEX OF SELECTED CORRESPONDENTS</head>
  <p>Researchers should refer to this index because there is correspondence spread throughout the collection. [Explain basis of selection] </p>
  <p>This index includes the names of selected letter writers and recipients, both individuals and organizations. </p>
  <p>Key: No symbol = Writer; * = Writer and recipient; # = Recipient</p>
  <list>
    <item>Addams, Jane 13, 26+, 105</item>
    <item>Alice Stone Blackwell Fund - see Blackwell, Alice Stone Fund</item>
    <item>Allen, Bernard M. 26</item>
    <item>Almy, Helen 26+</item>
    <item>American Civil Liberties Union (See also Roger Baldwin) 26*, 146</item>
  </list>
</odd>
```

Separation Record <separatedmaterial>

Here are listed all materials removed from the collection. State where the item has been sent or if it was discarded. Common designations include "transferred to the Schlesinger Library Books and Printed Materials Division," "transferred to the Schlesinger Library Periodicals," and "returned to donor." EXAMPLE:

```
<separatedmaterial><head>SEPARATION RECORD </head>
  <p>Donors: </p>
  <p>Accession number: </p>
  <p> Processed by: </p>
  <p> The following items have been transferred to Widener Library: </p>
  <list>
  </list></separatedmaterial>
```

Internal Finding Aid Links <ref>

In the past, internal links were used to link from the series description in the Scope & Content to a particular series or a particular folder, or from "See also" comment to a related folder.

Please note that the use of the internal finding aid link is a discontinued practice; documentation exists in this manual as it was a common practice in our early finding aids.

The format within the <ref> tag must be the same. The "sch#" is the unique number assigned to your finding aid; the s1 is the "code" for Series I. Other "codes" are: f = folder, ss = subseries.

EXAMPLES:

```
<p><ref target="sch00029s1">Series l</ref>, Personal and .. (#1-77)....
```

This reference target points to a specific "item," which in this case is the series. So, at the series heading you will identify the "series" to complete the link. Notice that the information between the quotes is exactly the same.
Specific folder numbers may also be pointed to:

... see also #<ref target="#sch00021f1.1">1</ref>.

The <c> tag for the folder would be changed to:

<c level="item" id="sch00021f1"><did><unitid>1.1</unitid><unittitle>Correspondence, 1910-1920</unittitle></did></c>

**External Reference <extref>**

When linking to websites and other OASIS finding aids, use the <extref> tag. Place the extref tag around the piece of text you would like to serve as the hotlink. Choose the attribute href and insert your link. Be sure to include http:// in front of your link.

Use these references sparingly to avoid the possibility of dead links in finding aids. EXAMPLE:

<extref xlink:href="http://www.now.org">NOW</extref>

For Harvard finding aids, be sure to use the finding aid's persistent name, or URN, when creating the link. To add links between collections, add a see also reference in the scope and content note. The link should include the number of the collection to which you are referring. EXAMPLE:

See also Harriet Louise Hardy papers, 1935-1994 <extref xlink:href="#sch00018"> (MC 431)</extref>

To link to a MARC record in HOLLIS+, use the link contained in the HOLLIS+ Permalink field

EXAMPLE: http://id.lib.harvard.edu/aleph/008357586/catalog

**Digital Archival Object <dao>**

The <dao> tag should be used when linking to digitized images of manuscript material, including images, books, and manuscripts, as well as websites harvested through WAX and digital audio files. Be sure to use the URN for the item when creating an external link to it.

Mark up the folder title as usual. Between the </unittitle> and </did>, add a <dao> tag. Choose the following attributes:

- xlink:actuate="onrequest"
- xlink:show="new"
- xlink:href="http://nrs.harvard.edu/urn-3:RAD.SCHL:xxxxxxx [URN to digitized material]"
- xlink:title=[title of object; must be unique to object being described. Include descriptors identifying archived web sites or audio files]

Please see Electronic Records, for more information.

EXAMPLE:

```xml
```

Older finding aids may include <daodesc> tags. These may be left as is or deleted. They will ingest into ArchivesSpace, but will not export to OASIS.

**Alma ID <processinfo>**

The Alma MMSID must be added to the finding aid to enable the harvesting of the finding aid for display in HOLLIS. Since there isn't an EAD tag for that purpose, the number should be entered into a <processinfo> tag with a <header> of "Alma ID." In the <p> tag, replace [HOLLIS #] with the number found in the HOLLIS Number field in the HOLLIS record.

Finding aids created prior to Harvard's Alma implementation in July 2018 contain a <processinfo> tag referencing Aleph (Alma's predecessor) numbers. Harvard systems currently run a script to convert the Aleph number into an Alma MMSID, but the system information should be changed when updating a finding aid.

**EAD Header <eadheader>**

Once all of the information has been entered into the finding aid, the EAD header must be completed. This section can only be seen in the "plain text" view. Place cursor on the top of the document in the "tags on" view and change the view to "plain text." In the "plain text" view, take notice of the tags within the <eadheader>. Within this section, there are two areas of text that need to be filled in:

```xml
<eadid>
Within this tag, insert the EAD ID number obtained from the Metadata Specialist (Paula) (that you asked her for when you started the collection!). Note: the alpha characters must be in lower case.
```

```xml
<titleproper type="filing"/>
```

This tag records the finding aid title. Information in this tag combines the author and title of the collection and appends ": A Finding Aid" to the end. The first part of the <titleproper> must match the name in the <origination> tag without the tags around the name. The second part must match the collection <unittitle>. 
EXAMPLE: person:


EXAMPLE: organization:


<sponsor>
The sponsor tag denotes the funding source for the processing (e.g., "The collection was processed with help from the Marion Fleischer Wasserman Fund."). If your collection does not have a sponsor, delete this tag. BE CAREFUL! If you don't delete the entire tag or delete part of the surrounding tags, your document will be invalid.

General Notes re: ArchivesSpace & EAD

Do not use <note>. Will not import
Do not use nested lists. Some, but not all data will import.
Do not use <chronlist>. They often import twice
Do not use <unitdate> outside designated areas in template
Do not embed <unitdate> in <unititle>

<frontmatter> is not recognized by ArchivesSpace. The tag has been removed from the template but remains in older finding aids. It does not impact ingest, so there is no reason to remove it.
<daodesc> does not have a function in ArchivesSpace and does not export. It should not be added to <dao>s going forward, but it doesn't impact ingest, so does not need to be removed from older finding aids.
Use only the following tags in <controlaccess>: <corpname>, <famname>, <genreform>, <geogname>, <persname>, <subject>

Completing Your XML Finding Aid

Check you work using the EAD Checklist for Finding Aids in ArchivesSpace.

Paula is in charge of checking XML tagging. When a finding aid is complete, a copy should be saved in G:\SCHLES\COLLECTION SERVICES\MANUSCRIPTS\FINDING AIDS and Paula should be notified that there is a finding aid ready to be posted (be sure to tell her the document name).

In some instances, portions of the online finding aid may be redacted (not displayed online, but still included in the archival copy of the finding aid stored in OASIS/displayed in HOLLIS). Consult the Metadata Specialist (Paula) about redacting part of a finding aid.

Submitting XML Finding Aids Upon Completion Of Your Finding Aid (After All Intellectual editing)

- Put a copy of your *.xml file into G:\SCHLES\COLLECTION\MANUSCRIPTS\FINDING AIDS on the network
- E-mail Paula telling her that your document is ready to post, include file name
- Paula will check the tagging in XMetaL. If there are significant changes, she will return it to you for editing.
- When editing is complete, Paula will inform Johanna that the finding aid is ready for review for ArchivesSpace. If there are significant changes, she will return it to you for editing.
- Johanna will ingest the finding aid into ArchivesSpace, which will automatically post the finding aid to HOLLIS for Archival Discovery. She will notify you of the posting, and of the correct permalink for the finding aid.

After The Finding Aid Is Posted in HOLLIS for Archival Discovery

Archivists should use the permalink provided to them to update the bib record and to include in any other communication about the finding aid.

Correcting Finding Aids After Posting in HOLLIS for Archival Discovery

If errors are found in finding aids that have been posted to HOLLIS for Archival Discovery, inform Paula or Johanna, who will provide you with a copy of the finding aid. Archivists are responsible for fixing errors, but all edits must be made to the copies of finding aid that Paula or Johanna provides. DO NOT keep local copies of finding aids once they have been ingesting into ArchivesSpace.