No Muss, No Fuss: EAD Finding Aids without XML

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Available at: https://works.bepress.com/rose_fortier/1/
No Muss, No Fuss

EAD Finding Aids Without XML

What is a Finding Aid?

- A document that describes the scope, contents, and provenance of a collection and lists the contents according to the physical organization of the collection

http://lcweb2.loc.gov/ammem/techdocs/repository/gengloss.html
Why create Finding Aids?

- To make special collections materials discoverable to the public via the internet
  - Increases access to manuscript and archival materials that are unique to many institutions
- One step on the road to partial or complete digitization of a collection

Why MPL creates Finding Aids

- More collections than time or resources to digitize
- Some collections are not appropriate for digitization
  - Contain sensitive materials
  - Marginal interest for the majority of users
What is EAD?

- Encoded Archival Description: A data interchange standard that defines the structural elements (and their interrelationships) to be used in creating archival inventories or registers
  http://mic.loc.gov/public_portal/pub_catglos.htm

Why use EAD

- As an international standard it helps in the creation of finding aids that are internally and externally consistent
- Created by the Society of American Archivists
  - “The committee that developed it did so with an eye on research which demonstrated that, despite a wide variety of idiosyncrasies, collection inventories include a core of similar content areas and structures” Creating EAD-Compatible Finding Guides on Paper, p. xv
What is XML?

- XML: Extensible Markup Language, it’s a computer coding language for creating structured computer documents

Advantages and disadvantages of XML

Advantages:
- EAD formatted finding aids in XML are cleaner to view and easier for end user to navigate
  - Example 1: Utah State University - uses EAD and XML
  - Example 2: MPL Special Collections Finder, Butler Album – doesn’t use XML
Advantages and disadvantages of XML
Advantages and disadvantages of XML

Disadvantages:
- Knowledge of XML encoding is a must
- Must also learn EAD schema completely

Questions?
Before you get to CONTENTdm

● Some things to consider are:
  ○ How to format the document
    ● Creation of template(s) to cover repeating information
    ● Breaks down into four areas: Descriptive Summary, Administrative Information, Collection Description, and Collection Inventory
  ○ Location of physical collections
    ● Staff and/or patrons will need to be able to locate the collection from the descriptive metadata

Before you get to CONTENTdm

● Metadata
  ○ Both within the document and for the final record in CONTENTdm
  ○ What fields do you want to have controlled vocabulary
    ● MPL uses the controlled vocabulary function for Subject Headings
    ● Also for Collection Format field
Metadata

The most important field to have. MUST be set as Full Text Search and MUST be left blank

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How to load your finding aids

- Just like loading any other multi-page PDF document
- Start with your document
  - We use Microsoft Word for our Finding Aids
How to load your finding aids

● Convert it to a PDF
  ○ Can use Adobe Acrobat, if not Primo PDF is a decent free PDF converter
  ○ PDF converter at [http://www.freepdfconvert.com/] is a good one without Primo PDF’s link issues

● Make sure your PDF converter is also converting the text, it can’t be just an image

How to load your finding aids

● In Project Client
  ○ Add Item
  ○ Specify File Name
  ○ Image Options
  ○ Processing
    ● Make sure that “Convert multi-page PDF files to compound objects” is selected
    ● Set Page Naming Settings if needed, we simply use “Page” and the number
Add Item

Use Add Item, not any of the other possible options.

Specify File Name

We don’t create a display image, we have created our own set of thumbnails.

The next step can be started here or...
Image Options

Make sure that this option is chosen, otherwise your document will not display properly and will limit the keyword searching functionality.

These settings can also be accessed from here.

Page Naming
How to load your finding aids

• Add image
  - In Project Client we replace thumbnail with a custom one designed for each collection or department
  - You could use one of the default images provided by OCLC, or can create one of your own

Replace Thumbnail

Replace thumbnail on an image by image basis here or…
Replace Thumbnail

1. Go here to set a permanent PDF thumbnail

2. Then select thumbnails

3. Edit the thumbnail to replace it with one of your own

How to load your finding aids

- Enter metadata
  - **Remember to leave the Text field empty**
How to load your finding aids

- Upload to CONTENTdm Administration when finished, do all the usual stuff (Approval, Indexing)

Where do I go from here?

- Using the standards enshrined in EAD means that these finding aids can fairly easily be adapted to XML
  - The headings used can be entered into an XML stylesheet
  - Stylesheets and other tips on adding finding aids can be found on CONTENTdm Online Help http://www.contentdm.org/help5/projectclient/adding5.asp
Questions?

Sources

  - Finding Aids can be found at this URL: http://www.kchistory.org/cdm4/results.php?CISOBOX1=finding+aid&CISOOP1=all&CISOFIELD1=CISOSEARCHALL&CISORESTMP=results.php&CISOVIEWTMP=item_viewer.php&CISOSUPPRESS=0&CISOROOT=%2FLocal