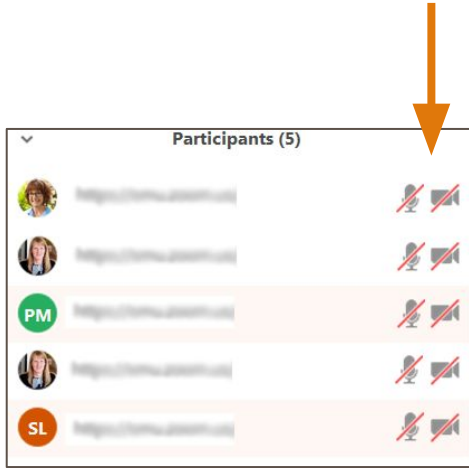


Be part of the major revision of the Encoded Archival Description (EAD)

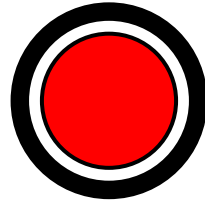
Call for Comments Open Sessions Series, Session 3, 18 June 2024

Call-in numbers: <https://zoom.us/join/91111111111>
Meeting ID: 841-5909-5724

All lines are muted



Use chat for questions



This webinar is being recorded and
will be available on YouTube:

<https://www.youtube.com/user/saastaff>

Be part of the major revision of the Encoded Archival Description (EAD)

Call for Comments Open Sessions Series, Session 3, 18 June 2024

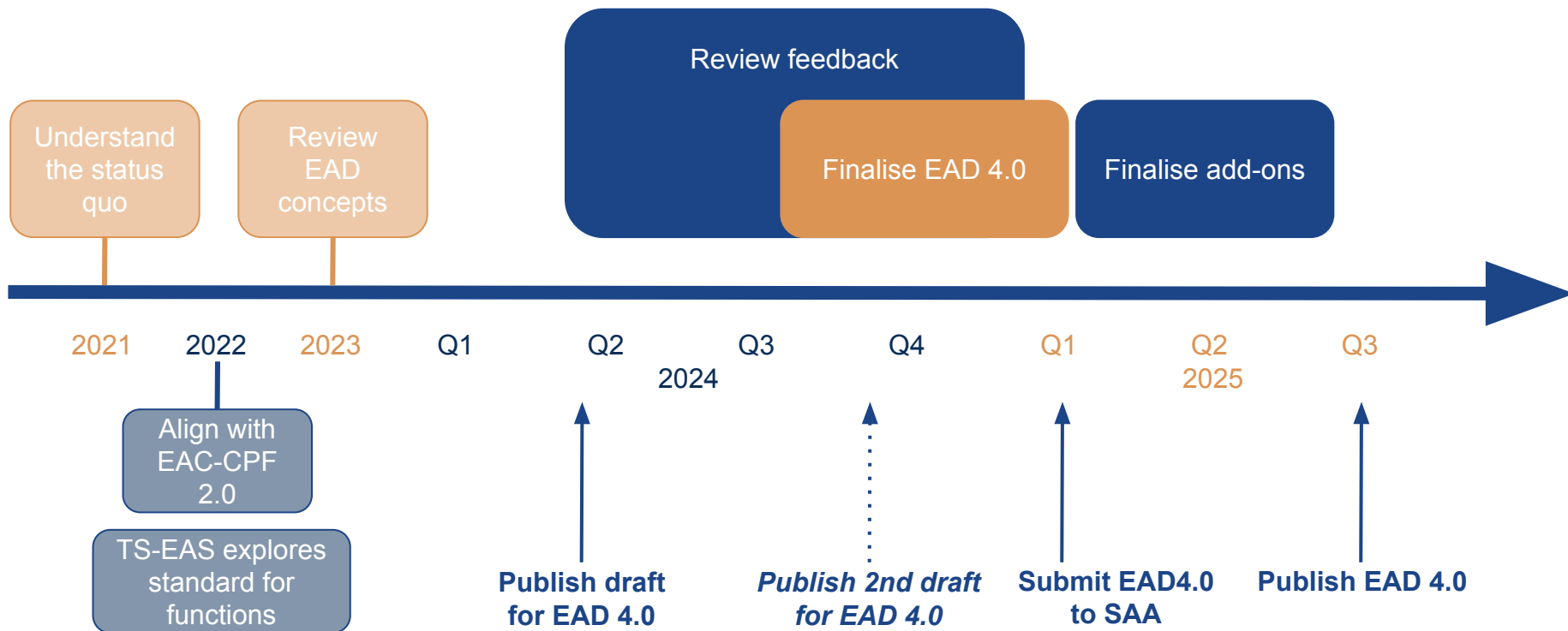
Presenters

Karin Bredenberg, Kommunalförbundet Sydarkivera (SE), co-chair TS-EAS

Kerstin Arnold, Archives Portal Europe Foundation (DE), EAD team lead

The major revision of EAD

Overall timeline



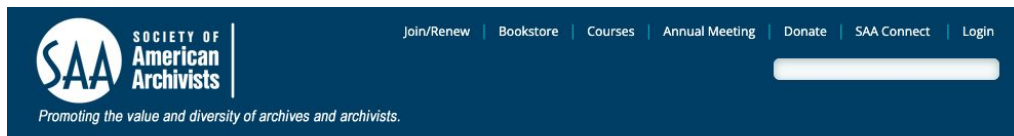
The Call for Comments



SOCIETY OF
American
Archivists

Technical Subcommittee on
Encoded Archival Standards

Find all information on the SAA website



HOME » GROUPS » TECHNICAL SUBCOMMITTEE ON ENCODED ARCHIVAL STANDARDS (TS-EAS) » CALL FOR COMMENTS: REVISION OF ENCODED ARCHIVAL DESCRIPTION

Call for Comments: Revision of Encoded Archival Description

Roster

The [Technical Subcommittee on Encoded Archival Standards \(TS-EAS\)](#) is pleased to release Encoded Archival Description (EAD) 4.0, a draft updated version of the standard for public review and comment. To ensure the greatest possible input from EAD users around the world, the subcommittee is calling for comments on the proposed changes to the current version, EAD3 (deprecated), [schema](#) and [tag library](#), and the previous version, EAD 2002, [DTD](#), [schema](#), and [tag library](#). The deadline for comments on the change proposals is Sunday, 28 July 2024. An introductory webinar on how to contribute to this call for comments is scheduled for 24 April (twice with the same content to accommodate different time zones around the world) at 10am UTC (open for [registration](#)) and 4pm UTC (open for [registration](#)). We are looking forward to seeing you there!

Technical Subcommittee on Encoded Archival Standards (TS-EAS)

ABOUT TS-EAS

[Roster](#)
[Subteams](#)
[Handbook](#)
[Contact us](#)

TS-EAS AT WORK

[GitHub workspace](#)
[Submit an EAD or EAC-CPF issue or feature request via GitHub](#)
[Submit an EAD or EAC-CPF issue or feature request via our webform](#)
[Meetings](#)

TS-EAS STANDARDS

[Official EAD Website](#)
[Official EAC-CPF Website](#)

<https://www2.archivists.org/groups/technical-subcommittee-on-encoded-archival-standards-ts-eas/call-for-comments-revision-of-e-0>



Find all information on the TS-EAS GitHub page

The screenshot shows the GitHub interface for the repository `SAA-SDT / TS-EAS-subteam-notes`. The left sidebar displays the file tree with the following structure:

- Files
- master
- Go to file
- Images
- TS-EAS-Notes
- documentation-subteam
- eaccpf-subteam
- ead-subteam
 - committee-updates
 - major-revision_2021-2025_documents
 - Editorial_ChangesInEAD4.0.pdf
 - FromEAD3toEAD4.0_ChangesIn

The main content area shows the commit history for the file `README.md` in the path `TS-EAS-subteam-notes / ead-subteam / major-revision_2021-2025_documents /`. The commit was made by `kerstarno` 4 days ago (commit hash `685abf0`).

Name	Last commit message	Last commit date
..		
Editorial_ChangesInEAD4.0.pdf	Add files via upload	5 days ago
FromEAD3toEAD4.0_ChangesInTheSchema_EI...	Add files via upload	5 days ago
FromEAD3toEAD4.0_TransformationRoutes.pdf	Add files via upload	5 days ago
Infograph.pdf	Add files via upload	5 days ago
README.md	Update README.md	4 days ago

https://github.com/SAA-SDT/TS-EAS-subteam-notes/tree/master/ead-subteam/major-revision_2021-2025_documents

Currently available documentation on EAD 4.0

- Posts on the [Descriptive Notes](#) blog
 - Third of five posts published last week:
<https://saadescription.wordpress.com/2024/06/11/shape-the-future-of-ead-a-call-to-action-part-iii/>
- Editorial
- Revision notes (compared to EAD3)
- The EAD 4.0 draft schema
- Transformation routes (compared to EAD3)
- Changes in the schema
- Example files

Documentation being prepared

- Will become available by the end of June
 - A draft Tag Library for EAD 4.0
 - Revision notes (compared to EAD 2002)
 - Transformation routes (compared to EAD 2002)
 - More example files
- Will become available later on (part of a potential second call for comments)
 - A draft conversion from EAD3 to EAD 4.0
 - Best Practice Guide extensions for EAD 4.0

Open drop-in sessions

- Informal
- Brief introduction to one major strand of the revision
- Open mic for questions, comments, and suggestions

- First session on how to contribute to the call for comments, 24 April 2024
 - <https://www.youtube.com/watch?v=eGttrBWj9wU>
- Second session on EAD becoming more interoperable
 - https://github.com/SAA-SDT/TS-EAS-subteam-notes/blob/master/ead-subteam/major-revision_2021-2025_documents/20240522_EAD4_CallForComments_Session2.pdf
- Today's session on EAD becoming more extensible

Open drop-in sessions

Open drop-in sessions

- Fourth session on EAD 4.0's sustainability and exchangeability, 9 July 2024
 - Part of pre-conference programme for the SAA Annual Meeting
 - <http://societyofamericanarchivists-316.my.webex.com/weblink/register/r8a0c096c3e8a2b5e33114f17ce7113f6>

Benefits of EAD 4.0: Extensibility

Reasons to consider extensibility

- History of "lending" elements and attributes from other standards
 - Added as part of the EAS schemas
 - Sometimes defined slightly different to their scope and intended use in their original contexts
 - Sometimes defined in the same way as in their original contexts
- Necessity to keep pace with developments of those other standards
 - Not because they are conceptually important when describing archival materials and their contexts
 - But solely to ensure the adopted elements and attributes as used in the EAS do not divert too much from their original contexts

Benefits of extensibility

- Makes it **easier to learn, use and manage** through a **streamlined approach** to elements used in various sections of an EAS instance instead of different elements encoding the same information
- **Reduces the complexity** of EAD by reducing the number of elements and attributes that are part of the standard
- **Helps in maintaining** the standards by focusing on the information they are meant to encode rather than e.g. how that information should be displayed

Benefits of extensibility

- **Builds on general standards** often used in export formats of collection management systems and supported by web browsers
- Enables the **inclusion of new attributes** without the requirement to have them added to the schemas
- Allows you to **start simple** and **add complexity step by step** and as applicable to your description practices and needs

An indirect requirement of (some) extensibility

- Building on general standards and enabling the inclusion of new attributes means **referencing other namespaces**
 - Usually you will have a fixed set of other namespaces that you might want to work with depending on your description practice and context
 - If you are hand-coding, it should be sufficient to declare those other namespaces once (in the root element)
 - Depending on the editor and version of the editor used, you might or might not have to include the namespace with each element and attribute
 - If you are mainly exporting or transforming data into the EAS, namespaces will usually be defined once in your export or transformation scripts

The changes in EAD 4.0

The following slides only mention some higher level changes.
For the full overview, see e.g. the [Revision notes \(compared to EAD3\)](#).

Re-using elements

- The new element <findAidDesc> (replacement of <filedesc>)
 - Uses elements such as <title>, <agent>, <date>, and <place> available in EAD 4.0 more generally
 - Instead of using elements such as <titleproper>, <subtitle>, <author>, or <publisher> only available in this specific context
- The new element <agent>
 - Brings together persons, organisations, and other groups of agents related to the materials described in one place
 - Instead of having them dispersed across different sections of the EAD instance

Re-using elements

- The new element <place>
 - Allows for the encoding of grouped place information in different contexts in the same way
 - Rather than having some contexts that only allow for the encoding of place names while others only allow for the encoding of address information
- The element <date>
 - Is used consistently in all contexts where a single date is encoded
 - Rather than having two elements do the same thing

Streamlining content models

- EAD 4.0 focuses on four main content models
 - Elements used with specific sets of sub-elements, e.g. <unitDateStructured> with sub-elements <date>, <dateRange>, and <dateSet>
 - Elements that can contain only text, e.g. <addressLine>, <language>, or <date>
 - Elements that cater for the formatting of longer narrative texts, e.g. <scopeContent> or <processInfo>
 - Elements that allow for inline tagging (“mixed content”), e.g. <abstract>, <unitTitle>, or <p>
 - One mixed content model across all elements of this category
 - Rather than having multiple variations of mixed content models

Formatting narrative texts

- Longer narrative texts in elements such as <scopeContent>, <accessConditions> or <relatedMaterial>, etc. as well as <findAidDesc> and <descriptionOfComponents>
 - Choice between breaking these texts down in simple paragraphs using the element <p> (*which remains part of the EAS schemas*)
 - And the new element <formattingExtension>

Formatting narrative texts

- `<formattingExtension>`
 - Allows for the inclusion of any valid XHTML elements for formatting starting with paragraphs, but extending this to lists, tables, etc.
 - Includes options such as hierarchical headers or divisions of the text, which were previously not available in EAD
 - Ideally used with the new [NVDL](#) format of the EAD schema, which allows the combined validation of EAD and XHTML elements

Using attributes of other namespaces

- All elements in EAD 4.0 allow for the inclusion of attributes of any other namespace
- Can be used to e.g. keep implementing the full set of XLink attributes
- Can be used to e.g. introduce more specific attributes from other related standards such as MARC21, METS, MODS, PREMIS, etc. when EAD attributes are not precise enough

Extending step by step

- Encoding related entities such as agents, functions, places, or subjects and their relationships with the archival materials
 - Starts with naming the related entity (as the only aspect that is required in all contexts)
 - Can be extended by referring to more detailed descriptions of the related entity in external vocabularies
 - Can be extended by providing more details about the relationship of the related materials with the archival materials directly in EAD
 - E.g. information about the type or role of the related entity
 - E.g. the temporal or geographic dimensions of the relationship

Learning, using, managing, and maintaining

- Some statistics
 - Compared with EAD3, the new version is down to 119 elements from previously 166 elements
 - Only 1 element has been removed without any substitution (<localcontrol>)
 - 69 elements have been replaced by or integrated with other elements
 - Compared with EAD3, the new version is down to 66 attributes from previously 85 attributes
 - 3 attributes have been removed without any substitution (@entityref, @xpointer, @lastdatetimestamp)
 - 28 attributes have been replaced by a suggested alternative encoding

Your questions, comments, suggestions

Our questions for you

Do you use <localcontrol>?

If yes, can you give an example of the information you encode in <localcontrol>?

Do you use @entityref and/or @xpointer?

If yes, can you give an example for the context in which you use these attributes?

Which formatting options do you use/support?

E.g. simple paragraphs, simple and nested lists, tables, simple and hierarchical headers, footnotes, blockquotes, etc.

Are there other formatting options you use/support?



Which formatting option(s) are used most often?

Are there any specific elements, in which the formatting is the most elaborate?
Do you use formatting in the contexts of <dsc> respectively the <c> elements?

Do your collections include any specific types of materials that require specific encoding options?

If yes, do you encode the descriptions of these materials in EAD or in another standard?
If you encode them in EAD, which types of materials and what are the encoding requirements?

How structured is your encoding e.g. of dates or extent and other physical information?

E.g. are these generic text fields or is the information distributed across a series of structured fields (such as start date and end date or quantity and unit of measurement)?
Is there any other information that you encode in a more structured way?

We want to hear from you!

Contribute to the Call for Comments by

- Reporting a bug or request a feature
 - On [GitHub](#)
 - Via our [web form](#)
- Sending us a general comment or question
 - Via email to ts-eas@archivists.org

We are also always looking for real-life encoding examples.

**Thanks very much for your attention
and your questions / comments!**

Remember the remaining Open Session planned on:
Tuesday, 9 July, 4pm UTC