

Style Guidelines for Encoding Existing Finding Aids at the University

Revision: 1.0

Note: See <http://nessie.library.pitt.edu/ead/procedures.html> for procedures in the encoding process including obtaining files and MARC records.

Tips and Suggestions:

Punctuation, Spacing, etc.

In general, do not leave trailing or leading spaces between the tags and the contents of the elements. Consistency is the key. Please note the punctuation notes throughout these guidelines for more specific examples.

Ampersands are usually encoded via HTML style:

Example: Johnson & Johnson would be encoded as: Johnson & Johnson

Rules for normalizing dates and unit dates:

Normalized dates are required for the following:

Within the <eadheader><profiledesc> and <creation>:

- date of encoding
- date of review

Within <admininfo> <acquisition>:

- date of acquisition

Within <admininfo><processinfo>:

- date of processing

- date of revision

Within the <did> of the archival description:

- the unitdate on the collection

The dates should include year, month and day information. Inclusive dates should include year, month, and day for both but separated by a dash (e.g., 1978-1979). If no month or day is offered, use two (or four) zeros. All normalized dates should consist of 8 digits (YYYYMMDD).

Examples:

```
<date type="inclusive" normal="20000302">March 2, 2000</date>
<date type="encode" normal="19990600">June 1999</date>
<unitdate type="inclusive" normal="19920000-19930000">1992-
1993</date>
```

Linking and Cross-referencing

If the finding aid links two or more items within the finding aid, EAD's <ref> element (and a matching attribute) is the equivalent of See or See Also, enabling the user to link immediately to that reference (without, for example, scrolling through the entire finding aid). Assign a unique id to the related components consisting of the collection number, the series number (if applicable), and the file name.

For example, Correspondence of the Cow Who Jumped Over the Monongahela may be included in Series I, Box 1, Folders 2-6. Two additional letters are located in Series III, Box 5, Folders 2-3.

Example:

```
<c02 level="file" id="mss214.s1file3" >Correspondence of the Cow Who
Jumped Over the Monongahela</c02>
```

At the point of reference to the file or item use the <ref> element to enclose the reference. Use the attribute "target" to point to the unique id of the component.

Example:

<ref target="mss214.s1file3">See Series III, Box 5, Folders 2-3</ref>

Grouping Materials with Redundant Information

Although the finding aids for the History Center usually have the levels already tabbed, instances do occur when the encoder may combine and/or group redundant information.

Example: the finding aid lists 3 folders in Box 1 like this:

Box 1 Folder 1 Correspondence, 1901
Folder 2 Correspondence, 1902
Folder 3 Correspondence, 1903

Instead of encoding three separate <c02> levels, with three almost-identical <unittitle>s, simplify matters. Correspondence is the redundant information and the only difference between the three folders is the date. Therefore, the encoding would look like this:

Example:

```
<c02 level="file"><did><unittitle>Correspondence</unittitle></did>  
<c03 level="file"><did><unitdate type="single">1901</did></c03>  
<c03 level="file"><did><unitdate type="single">1902</did></c03>  
<c03 level="file"><did><unitdate  
type="single">1903</did></c03></c02>
```

Note: Container information has been omitted for simplicity's sake.

Containers

Containers will usually be boxes or folders, although volumes, reel cans, rolls of microfilm, etc. do appear. Containers require identification numbers consisting of the <unitid> of the collection (like hsmss75 or ais6536) and the appropriate box or folder number (box numbers are preceded by the letter "b" for box and then the appropriate box number).

Example: Box 1, Folder 1 of MSS#75 would be:

```
<container type="box" id="hsmss75.b1">1</container>
<container type="folder" parent="hsmss75.b1">1</container>
```

Important punctuation note: Please note that the attribute value of "id" must consist of lower-case letters (hsmss or ais), with no # (number) symbol. Insert a period between the collection ID and box number. And don't forget to put the box number between the tags!

The parent attribute matches the box id number and signifies that folder 1, e.g., belongs in box 2. The container tags for boxes only need to be encoded once for each box. Therefore, the container tags for boxes do not need to be added for every folder in box 1 but when box 2 begins, then the container tags with box 2 info needed to be added (but only for folder 1, box 2).

Example:

```
<c02 level="file"><did>
<container type="box" id="mss75.b1">1</container>
<container type="folder" parent="mss75.b1">1</container>
<unittitle>Disneyworld Trip <unitdate type="single"> July
1975</unitdate></unittitle></did></c02>
<c02 level="file"><did>
<container type="folder" parent="mss75.b1">2</container>
<unittitle>Disneyland Trip<unitdate type="single">January
1959</unitdate></unittitle></did></c02>
```

When beginning Box 2. . .

```
<c02 level="file"><did>
<container type="box" id="mss75.b2">2</container>
<container type="folder" parent="mss75.b2">1</container>
<unittitle>EuroDisney Trip <unitdate type="single">August
1995</unitdate></unittitle></did></c02>
```

Combining Containers:

Sometimes, the finding aid will look like this:

Folder 3 Newspaper clippings 1980

Folder 4 Newspaper clippings 1980
Folder 5 Newspaper clippings 1980

Instead of encoding three separate <c02> levels, for example, combine the three folders into one. Before doing so, however, ensure that the unit title and the unit dates are exactly the same. In this case, the unittitle is "Newspaper clippings" and unitdate is "1980." The encoding would look like this:

Example:

```
<c02 level="file"><did>  
<container type="folder" parent="mss75.b1">3-5</container>  
<unittitle>Newspaper clippings <unitdate type="single">1980</unitdate>  
</unittitle></did></c02>
```

Putting EAD into Play: Encoding Guidelines

Know the file name

Files should be named after the repository and the collection number. The names should be no more than 8 characters/numbers and should not include non-alphanumeric data. The abbreviations for collections are as follows:

Example:

Historical Society - HS - hsmss76.sgm
Archives of Industrial Society -AIS - ais837.sgm
University Archives - UA - ua210.sgm
UE/Labor - ue9813.sgm
Curtis Theater Collection - CTC - ctc25.sgm
Darlington Library - DARL - darl4.sgm

<ead> Encoded Archival Description

Compose an "id" attribute for the EAD tag that will allow an alphabetical sort. Include key parts of the title and the collection number. Ids must be unique.

Combining the alphabetical sorting with the collection number generates an unique id that simplifies the searching process.

Example:

<ead id="coldrenjesseMSS123"> (for the Collection of Jesse Coldren, MSS#123)

<ead id="pittsburghpublicschoolsmsp124"> (for the Photographs of the Pittsburgh Public Schools, MSP#124)

<ead id="spencerfamilyais907"> (for the Photographs of the Spencer Family, AIS90:7)

Punctuation Note: Do not use spacing, punctuation or capitalization.

<eadheader> EAD Header

Most of the <eadheader> will be a part of the template.

<eadid> EAD Identifier

The <eadid> will consist of the country code and repository and the unique ID assigned to the collection by the repository

Example for the History Center: <eadid>US-QQS-MSS#76</eadid>

Example for the Archives Services Center: <eadid>US-PPiU-AIS12:34</eadid>

Punctuation Note: Do not use any spaces within the <eadid> tags. Include the # (pound) symbol or : (colon) if it is a part of the repository's system.

<titleproper> Title Proper of the Finding Aid

The title proper within the file description should contain the title of the collection (in accordance with **Archives Personal Papers and Manuscripts [AAPM]**) prefaced by the phrase "Guide to." The first character of the title of the collection should be capitalized.

Example: Original finding aid entitled: Josephine Zilch's Collection. Using **APPM** guidelines, the <titleproper> becomes:

<titleproper>Guide to the Collection of Josephine Zilch</titleproper>

Example: Original finding aid entitled Trimble Company, Records. Using **APPM** guidelines, the <titleproper> becomes:

<titleproper>Guide to the Records of the Trimble Company</titleproper>

Use <date> tags--no attributes needed--if the title contains a date.

Example: <titleproper>Guide to the Collection of Josephine Zilch, <date>1912-1936</date></titleproper>

Example: <titleproper>Guide to the Records of the Trimble Company, <date>1883-1967</date>

Punctuation Note: Please leave a space between the comma and opening date tag.

Rules for naming titles:

Transcribe the spelling of the collection title, but not necessarily the wording, punctuation or capitalization. As part of the title statement, give, in direct natural order of language, the name of the collection. Additionally, give the name of the person(s) or corporate body, in direct order natural language, chiefly associated with the materials as part of the title statement.

Also, record a term that specifically characterizes the form of material in the unit being described (e.g., diaries, ledgers, photographs, records). For collections containing multiple forms of materials, choose "Records" for the materials of corporate entities, "Papers" for personal papers, or "Collection" for materials artificially formed to document a person or entity.

When appropriate, enter additional descriptive terms that reflect a specific function, location, subject area, etc. When in doubt consult **APPM** and/or check with the supervisor.

Examples:

- Diaries of Jane Doe (instead of Jane Doe, Diaries)
- Papers of the Hamilton Family (instead of The Hamilton Family Papers)
- Records of the Evaline Dairy Company (instead of the Evaline Dairy Company, Records)
- Photographs of Mitchell Gibson (instead of Mitchell Gibson, Photographs)

<creation> Creation

Within the profile description under creation, information about both the encoder and the reviewer should be included in the following format. The "reviewed by curator" information, however, will not be completed until the curator has reviewed the encoding.

Example:

```
<creation>Encoded by Joe Schmoe in <date type="encoder"
normal="19990600">June 1999 </date> from an existing finding aid.
<lb>Reviewed by Curator John Doe in <date type="reviewer"
normal="19990700">July 1999.</date></creation>
```

<frontmatter> Front Matter

Complete the following sections of the front matter:

<titleproper> Title Proper of the Finding Aid

This should be entered exactly as the <titleproper> within the <eadheader>

<subtitle> Subtitle

The subtitle should contain the local ID for the collection.

Example: <subtitle>MSS #29</subtitle> **NOT**
<subtitle>MSS#29</subtitle>

Example: <subtitle>AIS 99:99</subtitle> **NOT**
<subtitle>AIS9999</subtitle>

Punctuation Note: Enter a space between the collection designation (MSS, AIS) and the collection number from the Historical Society. The subtitle for the Archives Service Center **does** include the colon.

<p> Paragraph

The two sentences listed within the <p> tags should also be filled out

Example: <p>This guide to the collection was originally prepared by Mickey Mouse on <date>April 1, 2000.</date> Revisions occurred to the finding aid as a part of the encoding process in <date>Spring, 2000.</date></p>

Example:<p>This guide to the collection was originally prepared by Historical Society Staff in <date>July 1958.</date> Papers rearranged and reinventoried by Minnie Mouse on <September 14, 1998.>/date<

Punctuation Note: Punctuation occurs **within** the <date> tags and **before** the </p>.

<archdesc> Archival Description

The following elements are within <archdesc>:

<archdesc level="collection">

The majority of our archival descriptions will be at the collection level. Although the template contains the attribute "level='collection'" already entered, check to make sure the finding aid reflects a collection. Choose an appropriate attribute value from the list of allowed attributes.

<did> Descriptive Indication

At the collection level, provide the appropriate attribute level label.

Example: <archdesc level="collection"><did>

The <did> for the collection level should include:

<unitid> ID of the Unit

Identifies the repository where the archival material is held or describes the organizational level(s) of the collection. <Unitid> is generally used at the collection series level. The <unitid> at the collection level should include the type, countrycode and repositorycode attributes.

Example #1:

```
<unitid type="collection" countrycode="US" repositorycode="QQS">
MSS#23</unitid>
<unitid type="collection" countrycode="US" repositorycode="PPiU">
AIS90:7</unitid>
```

Note: In this example, QQS refers to the NUMUC's assigned code for the Heinz History Center and PPiU is the repository code for the Archives Service Center.

Series also requires a <unitid>. For example, the finding aid for the Rev. Wallace Smetzer Collection begins with Series I: Wrensall, John (1808-1817)

The encoding would look like this:

Example #2:

```
<c01 level="series"><did>
<unitid type="series">I.</unitid>
<unittitle> Wrenshall, John <unitdate type="inclusive"> 1808-
1817</unitdate></unittitle>
```

<unittitle> Title of the Unit

The <unittitle> for the collection can also be drawn from the MARC record (constructed according to **APPM** standards). In some cases, however, the MARC record does not contain an **APPM** constructed title and therefore, modify it according to **APPM**.

Example:

Josephine Zilch's collection: <unittitle label="collection">Collection of Josephine Zilch</unittitle>
Trimble Company's records <unittitle label="collection">Records of the Trimble Company</unittitle>

<unitdate> Date of the Unit

Identifies the date(s) of creation for the materials being described. The unitdate should include a type attribute--bulk, inclusive or single. The <unitdate> should be within the <unittitle> tags. If both inclusive and bulk dates are used, use more than one <unitdate> to encode the dates. If the date is the only thing in the title, enclose it within the <unittitle> tags. If the date includes a "c" or "ca" to indicate circa, place it within the <unitdate> tags before the actual date.

Examples:

Dates for the collection are 1804-1867 (inclusive) and 1804-1824 (bulk)
<unitdate type="inclusive" label="collection" normal="18040000-18670000">1804-1867</unitdate>
<unitdate type="bulk" label="collection" normal="18040000-18240000">1804-1824</unitdate>

Date for collection is offered as ca1824.
<unitdate type="single" normal="18240000">ca1824</unitdate>

<origination> Origination

Origination identifies the creator or collector of the materials being described. The origination element should include the attribute "label" that identifies the person or corporate body that created or collected the material. The default setting for the "audience" attribute for the History Center is "external" and "internal" for the Archives Service Center. Use either the designation "creator" or "collector." For example, John Smith donated the papers that he created.

Example: <origination label="creator">John Smith</origination>

Another example: John Doe, President of the Acme Corporation, donated the records of the Acme Corporation to the archive. The origination label will be "creator" and not "collector" because the Acme Corporation created the records, not John Doe.

Example: <origination label="creator">The Acme Corporation
</origination>

If, however, Jane Doe collected literary manuscripts of several authors and donated those manuscripts to the archive, the origination label and Jane Doe would be designated as the "collector."

Example: <origination label="collector">Jane Doe</origination>

<physdesc> Physical Description

Identifies the physical extent of the collection as well as type of material being described. The <physdesc> at the collection level should be identified with the label "collection." For the History Center collections, units for the extent element should be "linear feet," while the Archives Service Center uses "cubic feet." After the closing extent tag, but before the </physdesc> tag, enter--in parentheses--the number of boxes (if necessary and if listed).

Example:

<physdesc label="collection">
<extent unit="linear feet">3</extent> (5 boxes) </physdesc>

If the collection is made up of microfilm, use the attribute of unit="reel".

Example:

<physdesc label="collection">
<extent unit="reel">2</extent></physdesc>

If another type of extent unit is listed on the finding aid, note it to the curator. If the extent does not follow the linear feet or number of microfilm reels, record it within the <physdesc label="collection"> element but not in the extent element.

Example: <physdesc label="collection">3 folders</physdesc>

<repository> Repository

The repository contains the actual physical collection. Repository information is contained within the template but the History Center's Rauh Jewish Archives, for example, needs to be added whenever one of their finding aids is processed.

Example:

```
<repository>  
<corpname>Rauh Jewish Archives</corpname>  
<corpname>Historical Society of Western Pennsylvania</corpname>  
<corpname>Senator John Heinz Pittsburgh Regional History  
Center</corpname>  
<address> address info</address> </repository>
```

<abstract> Abstract

Abstracts offer the researcher a very brief description (2-3 sentences) of the significant facts of the organization or person and the types of materials (e.g., memos, clippings, receipts, bills, etc.) found within the collection so that s/he can determine its usefulness for research.

In many cases (especially for the HSWP finding aids), constructing an abstract that combines a sentence or two from the <bioghist> and a sentence from the <scopecontent> may be the easiest method.

Example: <abstract>Reverend Thomas F. Coakley was a prominent Catholic priest in Pittsburgh at Sacred Heart Church from 1923-1951. Coakley's scrapbooks consist of nine volumes primarily documenting his service as priest of the Sacred Heart Church, 1921-1949, which include newspaper articles, clippings, correspondence, postcards, programs, publications and photographs. </abstract>

<admininfo> Administrative Information

<Admininfo> offers the user background information on acquisition information, custodial history and other formats (such as microfilm) the collection may be found. All elements are required unless otherwise specified.

<acqinfo> Acquisition Information

Donation information. Transcribe as written on the finding aid (usually the cut-and-paste method). Include the type="acquisition" attribute and the "normal" attribute with the year, month and date of acquisition listed.

The History Center's provenance information generally includes the sentence, "These materials came in one accession." Combine this sentence with the date information.

Example: <p>These materials came in one accession in <date type="acquisition" normal="19990000">1999.</date></p>

Punctuation Note: Please include the word "in" and note the period **within** the brackets.

Create additional <p> tags for the remaining acquisition information. If more than one acquisition number is given, each donation receives separate <p> tags. Cut and paste **all** the information listed on the finding aid.

Example:

<p>Acc# 1982.251 Gift of Anthony H. Trimble, (Records. Anthony Trimble was the last head of the Trimble Company).</p>
<p>Acc# 1988.205 Gift of John Trimble, (Records)</p>

<custodhist> Custodial History (Optional)

Custodial history provides a list of ownership or custody changes of the collection before it came to the repository. For example, Mary Smith maintained custody of the collection for 10 years, then gave it to her son, John. John donated the collection to the History Center. Mary Smith, therefore, would be considered part of the custodial history.

Example: <custodhist><p>Mary Smith maintained the records of this collection from 1930-1950. In 1950, she gave the records to her son, John Smith.</p></custodhist>

If the information is contained within the finding aid, add it. Otherwise, delete the start and end tags.

<prefercite> Preferred Citation

The preferred citation offers researchers, e.g., the correct format for citing the repository in any papers s/he may write or publish. <Prefercite> information is derived from combining the name and dates of the collection, the unitid (e.g., MSS#29 or AIS 95:95) and the appropriate name of the repository.

Example: <prefercite><p>Papers of the Thaw Family, 1791 - 1981, MSS#29, Historical Society of Western Pennsylvania</p></prefercite>

Punctuation Note: Please insert a space within the <unitid>: MSS# 29 or AIS 93:93.

<note label="prevcite"> Previous Citation (Optional)

This is used only if the name of the collection has changed. Ensure that the "label" attribute reads "prevcite."

Example: <note label="prevcite"><p>This collection has been previously cited as: Thaw, Family Papers, 1791 - 1981, MSS#29, Historical Society of Western Pennsylvania</p></note>

<accessrestrict> Restrictions on Access

Access restrictions generally remain "No restrictions" or "This collection is open for research." If, however, the collection is restricted to the public, transcribe (or cut and paste) that information within the <p> tags.

<userrestrict> Restrictions on Use

Generally, user restrictions will remain as they are in the template. See your supervisor or the SAA publication *EAD Tag Library* for more information.

<altformavail> Alternative Form Available (Optional)

The collection may be stored or contained in a different format other than paper. The Archives Service Center, for example, maintains a few microform versions of their collections. Obviously, if this information is noted on the finding aid, include it. If not, delete both <altformatavail> tags.

Example: <altformatavail><p>This collection has been microfilmed and is available on four reels <num type="microfilm reel">MF1999:011.</num></p>

<processinfo> Processing Information

Processing information is the name (or names) of the repository staff who processed the collection and the processing date. For example, Winnie the Pooh processed the collection on April 1, 1994. Note that processing dates are normalized and the name element contains an attribute of "processor."

Example: <p>This collection was processed by <name role="processor">Winnie the Pooh</name> on <date type="processed" normal="19940401">April 1, 1994.</date></p>

Punctuation/Grammar Note: Please change the preposition "in" to "on" if necessary and note the period **within** the brackets. Also ensure the spacing between words is accurate.

If the finding aid acknowledges that the collection was originally processed by Minnie Mouse in 1962 and then Mickey Mouse and Pluto rearranged and reorganized the papers on September 23, 1982, include that information as well (this usually entails changing the template's original sentence and adding more name and date tags, as well as their accompanying attributes).

Example: <p>This collection was originally prepared by <name role="processor">Minnie Mouse</name> in <date type="processed" normal="19620000">1962.</date> The papers were rearranged and reorganized by <name role="processor">Mickey Mouse</name> and <name role="processor">Pluto</name> on <date type="processed" normal="19820923">September 23, 1982.</date></p>

Punctuation/Grammar Note: As with the above example, please change the preposition if necessary, as well as placing the period **within** the brackets and using the correct spacing.

Complete **both** of the sentences within the <processinfo> tags. In the example below, Donald Duck was the individual (or fowl) who encoded the finding aid on April 21, 1999.

Example: <p>Revision and rearrangement for the encoded version of the finding aid provided by <name role="revision">Donald Duck</name> on <date type="revision" normal="19990421">April 21, 1999.</date></p>

Punctuation/Grammar Note: Note the change in preposition and the period **within** the brackets.

Also, after the "Revision and rearrangement . . ." sentence, **only** the Archives Service Center's template contains the following sentence: "Information about the collection title and the controlled access terms was extracted from the MARC record in the University of Pittsburgh catalog Notis ID number: "

The Notis ID number may be obtained from the on-line MARC record. If the finding aid contains no MARC records or no Notis ID number can be found, delete the entire sentence of "Information about the collection . . . number:"

Example: <p>Revision and rearrangement for the encoded version of the finding aid provided by <name role="revision">Donald Duck</name> on <date type="revision" normal="19990421">April 21, 1999.</date> Information about the collection title and the controlled access terms was extracted from the MARC record in the University of Pittsburgh catalog Notis ID number: AKT9900.</p>

Punctuation Note: Enter the Notis ID number after the colon (with a period to end the sentence) and before the </p> tag. And remember that the Notis ID number is **only** for the Archives Service Center.

<bioghist> Biography or History

Biography or History describes the history of the company or the biography of the individual of the collection. The <head> tags contain the title of the history or biographical section of the finding aid, as well as the dates (if included). Please

note that the dates do not need date tags (in fact, the encoded finding aid will not validate). The head tags may be optional. If so, delete the tags from the template.

Example: <head>Biographical Sketch of Reverend Thomas F. Coakley, 1880-1951</head>

Include <p> tags for every new paragraph. Also, read the information briefly, specifically looking for glaring grammatical/spelling/punctuation errors, as well as book or magazine titles (which will need <title> tags). Dates within the <bioghist>, however, do not need date tags.

Example: <p>Wallace G. Smeltzer was the historian of the Western Pennsylvania Conference of the United Methodist Church for many years and wrote many pieces about Methodism including <title>Methodism in Western Pennsylvania, 1784-1968</title> (1969) and <title>The History of United Methodism in Western Pennsylvania</title> (1975). Smeltzer was born in Pennsylvania in 1900. He graduated from Indiana State Normal School (now Indiana University of Pennsylvania) in 1921, Grove City College, B.S. in 1926, D.D. in 1948, and Western Theological Seminary (now Pittsburgh Theological Seminary) in 1932. From 1925 to 1965, he served as a pastor both in Western Pennsylvania and abroad. During World War II, he was a navy chaplain (1943-1945) and senior headquarters chaplain of the III Amphibious Corps of the United States Marine Corps.</p>

<scopecontent> Scope and Content

Scope and Content contains information to assist the user about the collection itself, i.e., what the collection consists of (diaries, pamphlets, memos, receipts, etc.), as well as the physical and intellectual arrangement (series, arranged chronologically, etc.). At this level, the scope/content will correspond with the entire collection. Many finding aids from the History Center, for example, will list the scope/content of the collection's series. Scope/content notes for individual series will be placed within the container list with each series.

Also, be sure to include the <head> tags. Usually, "Scope and Content" will be the header, but check the finding aid's scope/content title; if the finding aid uses another term for this section, enter the finding aid's title.

Don't forget the <p>tags--like <bioghist>, each new paragraph requires new <p>tags. The opening and closing scopecontent tags need to appear only once.

Example:

```
<scopecontent><head>Scope and Content Notes</head>
<p>The collection includes letters, diaries, manuscripts and typescripts of
speeches and
published and unpublished writings, newsclippings, and genealogical
research, documenting
the lives of members of the Bakewell and McKnight families of Pittsburgh
and the Boardman
family of Philadelphia, Pennsylvania. The materials appear to have been
assembled, organized,
and analyzed by Martha Harding Bakewell McKnight as part of her
research on the Bakewell
and Boardman families.</p> </scopecontent>
```

<organization> Organization (Optional)

Organization represents the intellectual division(s) of the collection and usually this consists of the collection's series (if the collection has no series, delete the <organization> tags). Information about organization may usually be found in the Scope Content Notes of the finding aid."

Example: <organization><p>The collection has been divided into two series, denoting the life and career of Mickey Mouse in Series I, and Minnie Mouse in Series II. </p></organization>

Example: <organization><p>Six series have been designated for the papers of Bakewell family members; the three daughters of Benjamin Bakewell, Mary Ella Bakewell, Euphemia Bakewell, and Martha Harding Bakewell McKnight; members of the McKnight family; and members of the Boardman family.</p></organization>

Punctuation Note: The template does not contain <tags> but both <organization> and <arrangement> information need <p> tags added.

<arrangement> Arrangement (Optional)

Arrangement consist of the **physical** information about the collection. This information is often found in the first few sentences of the Scope Content Notes of the in the History Center finding aids. (If the cut-and-paste method is used, and once the organization and/or arrangement sections are completed, please remember to delete the redundant information from the <scopecontent> pertaining to organization and arrangement.)

Example: <arrangement><p>The Bakewell-McKnight Family Papers are housed in five archival boxes.</p></arrangement>

Example: <arrangement><p>The Donald Duck Collection is housed in three archival boxes, with folders arranged chronologically.</p></arrangement>

Punctuation Note: The template does not contain <tags> but both <organization> and <arrangement> information need <p> tags added.

<controlaccess> Control Access

For most of the History Center and Archive Service Center finding aids, the pre-encoded MARC record already exists at the search pages for the HSWP and ASC:

For the History Center: <http://nessie.library.pitt.edu/ead/hswpeadsearch.html>

For the Archives Service Center:

<http://nessie.library.pitt.edu/ead/eadbibl/eadsearch.html>

Once you find the correct control access terms for your collection, the easiest method is to copy and paste a field at a time--copy and paste all the terms for Subject/Topic, for example, and then cut and paste the terms under Corporate Names and so on. If no terms are listed for Personal Names, e.g., simply delete the appropriate <controlaccess> and <persname> tags (including the header tags). To eliminate the chance of errors, pay special attention to the header, opening and closing tags and also ensure that all the terms in the MARC record from the paper-version of the finding aid are listed in the encoded version

(examples are listed below the table). If a control access term is listed on the finding aid but not in the pre-encoded version, enter that term manually (see table below for help with encoding analog and source codes).

Important Note: Do **not** include 690 subject fields from the online catalog that have donor information or acquisition information.

Punctuation Notes: In controlled access terms, terms are separated by a space, two dashes and a space between terms.

Example: Railroads -- Pennsylvania -- Pittsburgh
 Department of Public Instruction -- Pennsylvania --
 Pittsburgh

Also, periods at the end of the entry will no longer be necessary. If periods exist on the pre-encoded MARC record, however, do not delete them--simply leave the entry as is. If a term is entered manually by the encoder, no periods are needed.

The table below offers the proper elements required if entries needed to be added manually. The following fields from the MARC record should be encoded in this section with the appropriate source and encoding analogs:

Field (encoding analog)	Element Name	Source	Header
600, 700	<persname>	Lcnaf	Personal Names
610, 611, 710	<corpname>	Lcnaf	Corporate Names
650	<subject>	LCSH	Topics
651	<geogname>	Leave out source	Locations
655	<genreform>	AAT	Forms
656	<occupation>	Often LCSH; sometimes AAT--if you don't have the info, leave it out	Occupations

Examples:

```
<controlaccess> <head>Subjects</head>
<subject source="lcsch" encodinganalog="650">
Railroads -- Pennsylvania -- Pittsburgh</subject></controlaccess>
```

```
<controlaccess><head>Corporate Names</head>
```

```
<corpname source="610" encodinganalog="lcnaf">
<corpname encodinganalog="610" source="lcsb">Bakewell, Pears &
Co. -- History</corpname>
```

```
<controlaccess><head>Personal Names</head>
<persname source="600" encodinganalog="lcnaf">
Mickey Mouse -- 1920-1990</persname></controlaccess>
```

```
<controlaccess><head>Locations</head>
<geogname encodinganalog="651" source="lcsb">United States --
History -- Civil War, 1861-1865</geogname></controlaccess>
```

```
<controlaccess><head>Forms</head><genreform source="aat"
encodinganalog="655">Diary -- Anne Frank</genreform>
</controlaccess>
```

<add> Adjunct Descriptive Data (Optional)

Use only if there is supplemental information (e.g., index files) that are not a part of the encoding. (See EAD Tag Library for more information.) Delete all the tags (<add>, <separatedmaterial> and <relatedmaterial>) if the collection has no separated or related materials.

<separatedmaterial> Separated Material (Optional)

Separated Materials refers to materials, such as photographs or oversized books, physically separated from the rest of the collection. For the <head> tags, enter the term used on the finding aid.

Example: <head>Separated Materials</head>

Although the collection may be physically separated, the collection may still be connected intellectually with a pointer tag using the <archref> element. The History Center, for example, offers a different ID number for their oversized and photograph collections. If MSS#117 (Records of the Pittsburgh Public Schools) contains photographs, the History Center separates the photographs and identifies the photograph collection as MSP#117 (Photographs of the Pittsburgh Public Schools).

Linking those two collections together intellectually, the <archref> tag and its attribute "href" are needed. Encoding the "href" information for MSP#117 would look like this: <http://digital.library.pitt.edu/ead-idx?findaid=US-QQS-MSP.117> Basically, the <archref> and href attribute will enable the user to click on the highlighted MSP#117 and link that user to the finding aid for the photographs of the Pittsburgh Public Schools, allowing more access to the all of the records of the Pittsburgh Schools, not simply the documents.

The examples listed below are the separations from MSS#277, the Records of the Urban League. Normally, finding aids do not contain this many separations, but the examples do provide a helpful guide.

Example:

```
<separatedmaterial>
<head>Separations</head>
<p>To the Photograph Collection, two linear feet of photographs have
been separately arranged and described as <archref
href="http://digital.library.pitt.edu/ead-idx?findaid=US-QQS-MSP.277">
MSP #277.</archref></p>
```

```
<p>To the Oversized Collection, one folder of oversized materials has
been separately arranged as
<archref href="http://digital.library.pitt.edu/ead-idx?findaid=US-QQS-
MSO.277"
>MSO #277.</archref> Included are election ballot sheets,
Urban League posters, maps, blueprints, and other sundry items.</p>
```

```
<p>To the Printed Collection, three linear feet of published materials, two
linear feet of serials and newspapers, and one linear feet of annual reports
have been individually catalogued. The published materials include census
statistics for Pennsylvania between 1940 and 1960, three copies of
<title>Daybreakers</title> (65th Anniversary History of the Urban League
of Pittsburgh), <title>Community Profiles</title> from 1984, numerous
works on racial issues and education, black business directories,
neighborhood atlases, several National Urban League publications, and
miscellaneous publications. The serials and newspapers include issues of
<title>The Urban Leaguer, The News from the Pittsburgh Public Schools,
Pennsylvania Education, American Demographics, The Pittsburgh
Courier,</title> and various other titles. The annual reports include those
of the Urban League, National Urban League, Pittsburgh Public Schools,
and various local foundations, hospitals, and corporations in Pittsburgh.
```

</p></separatedmaterial>

Punctuation Note: Note the periods within the brackets, as well as the title tags within the Printed Collection example. Please be careful of the spacing between tags as well.

<relatedmaterial> Related Materials (Optional)

Like the <separatedmaterial> tags, related materials refers to information related to the finding aid, but that information is not contained within the finding aid itself. For example, a repository in Pennsylvania may have a collection on the papers of Donald Duck while another repository in Florida may have a collection on Daisy Duck. Daisy's collection has correspondence from Donald to Daisy. The researcher may be interested in that information. Hence, a brief note about this repository's collection may be included within the <relatedmaterial> tags.

Or, a best-selling book on Andrew Carnegie is available within the University of Pittsburgh's library but is not part of Carnegie's papers at Archives Service Center. The finding aid of Carnegie's records may have a <relatedmaterial> listing the title, author and call number.

Like <separatedmaterial>, <relatedmaterial> also requires <head> and <p> tags. Use the term(s) from the finding aid itself or simply refer to the header as "Related Materials"

Example:

```
<relatedmaterial>
<head>Related Correspondence</head>
```

Example:

```
<relatedmaterial>
<head>Related Materials</head>
<p>Additional information may be obtained from Russell Duino's master's
thesis,
published in 1959 while he was a student at Western Reserve (now Case
Western).</p>
```

Now, finally, the container list information:

The Archives Service Center now only encodes information at the collection-level so therefore, container lists (boxes, folders, etc.) will no longer be necessary. If, however, the collection contains series and scope/notes, that information still needs to be entered.

Important Note: Before the encoding begins, identify and/or write down on the finding aid (either beside the folder or folder title/date) the various component levels found in the finding aid. Do not begin encoding a finding aid until this has been done! This easy exercise simplifies the encoding process later on (especially if the tabbing on the finding aid is incorrect) and alerts the encoder to possible problems before beginning the actual encoding.

<dsc> Description of Subordinate Components

<dsc type="combined">

The template for both the History Center and the Archives Service Center already has the attribute of "combined" entered for <dsc>. If, however, a finding aid consists of only an analytic overview, see your supervisor.

<C01> Level

Depending on the collection, the description may begin at any of the following levels: Series, File, or Item.

<C01>(Series):

- Required Tags: <unitid type="series">, <unittitle>, <did>
- Possible Tags: <unitdate>, <scopecontent>, <bioghist>, <arrangement>, <organization>, <physdesc>, <note> or other appropriate tags from the collection level description (see EAD Tag Library).

Example:

<c01 level="series"><did>

```
<unitid type="series">I</unitid>
<unittitle> Correspondence <unitdate type="inclusive">1956-1965
</unitdate> </unittitle> </did>
<scopecontent> <p>Correspondence includes letters from Donald Duck to
Daisy Duck, to Mickey Mouse and to his three nephews (Huey, Dewey
and Louie).</p></scopecontent>
```

Punctuation Note: When entering the <unittitle>, leave spaces at the beginning and end of title (see above example).

Important notes: The unitid series number will always be a Roman numeral (e.g., I, II, or V). Also, many series contain arrangement and/or organization information (organization, e.g., usually acknowledges the subseries contained within the series) and those tags needed to be added after the </scopecontent>. If, for example, Donald Duck's correspondence was broken into three separate subseries, the arrangement and organization tags would look like this:

Example:

```
<organization><p>This series contains three subseries:
Daisy Duck, Scrooge McDuck and The
Nephews.</p></organization>
```

```
<arrangement><p>Donald Duck's correspondence is
arranged alphabetically by folder title.</p></arrangement>
```

<C01> (File or Item Level):

- Required Tags: <unittitle>, <did>
- Possible Tags: <unitdate>, <container>, <physdesc>, <note> or other appropriate tags from the collection level description (see EAD Tag Library).

Example:

```
<c01 level="file"><did>
<container type="box" id="mss75.b1">1</container>
<container type="folder" parent="mss75.b1">1</container>
<unittitle>Ducks Unlimited <unitdate type="single">March
1997</unitdate></unittitle>
</did></c01>
```

Example:

```
<c01 level="item"><did>
<container type="box" id="mss75.b1">1</container>
```

```
<container type="folder" parent="mss75.b1">1</container>
<unittitle>"To My Dear Donald" </unittitle>
<physdesc>2 letters</physdesc></did>
```

Example:

```
<c01 level="file"><did>
<unittitle>Correspondence </unittitle></did>
```

<C02> Level

<C02> tags may contain subseries, file, or item level attributes. <C02> is always contained within the <c01> tags, and describes the subordinate components of a series or file.

<C02> (Subseries Level)

- Required Tags: <unittitle>, <did>
- Possible Tags: <unitdate>, <physdesc>, <scopecontent>, <note> or other appropriate tags used at the collection level (see the EAD Tag Library).

Example:

```
<c02 level="subseries"><did>
<unitid level="subseries">2.</unitid>
<unittitle> Letters to Scrooge McDuck <unitdate type="inclusive">1958-
1995</unitdate></unittitle>
<physdesc>10 folders</physdesc>
</did></c02>
```

Punctuation Note: Add the space before and after the actual title.

Important Note: If arrangement and organization information is contained within the subseries scope and content notes, it is not necessary to encode that information. Simply leave the subseries's arrangement and organization information within the scopecontent notes.

<C02> File or Item Level

- Required Tags: <unittitle>, <did>
- Possible Tags: <unitdate>, <physdesc>, <note>

Example:

```
<c02 level="item"><did>  
<container type="folder" parent="mss75.b1">8</container>  
<unittitle> "To My Dear Nephews"  
<unitdate type="inclusive">1962</unitdate></unittitle>  
<physdesc>10 pages</physdesc>  
</did></c02>
```

Example:

```
<c02 level="file"><did>  
<container type="folder" parent="mss75.b3">12</container>  
<unittitle>Daisy's Letters </unittitle>  
</did></c02>
```