

# Procedures for the EAD Project

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*Revision: 1.20*

**NOTE:** Various pieces of documentation can be found at <http://nessie.library.pitt.edu/ead/>

## **Choose a finding aid, with a tracking sheet, from the incoming box.**

Ensure that the finding aid has a tracking sheet and that the first item "Entered into Database" has been completed (i.e., a date and someone's initials will be on the sheet). If the finding aid has a very long container list, there should be an address or note on the tracking sheet indicating the location of the pre-encoded EAD. Review the finding aid. Ensure that collection dates, collection number, linear/cubic feet, and repository names are all listed. Briefly skim the historical sketch and the scope/content notes for titles, misspellings, incomplete sentences, long and/or too-detailed scope/content notes, etc. If any major errors are found, alert your supervisor. Also, skim the container list, making sure that tabbing, box numbers, etc. are correct. If there are problems, return the finding aid to your supervisor.

## **Register your claim on the finding aid.**

Register your finding aid in the Access database: *Programs --> Office 97 --> Access --> q:/admin/tracking*

Choose either the *Forms* or *Tables* option (Tables is the easier one of the two). The collection number, file name and title should already be entered but if that information is not listed, enter that info (also entering the date and your initials on the tracking sheet). Enter your name (encoder) and the date (encoding begins). See [Style Guidelines](#) for file naming directions.

## Copy the Word version of the finding aid to your directory.

- Open *Microsoft Word*.
- Select *File --> Open*.
- Click on the downward arrow key within the *Look in* box.
- Highlight the shared drive *ead\$ on 'Ulsdr100'(Q:)*. A list of folders should appear. You should know the folder name of where the finding aid can be located (either from the tracking sheet's "Location of Original" or from your supervisor).
- Find and highlight the appropriate folder (for example, finding aids from the History Center will be labeled "hswp14" or "hswp8").
- Open folder
- Find the appropriate title of your finding aid
- Highlight finding aid title
- Open
- When the *Word* document appears, highlight the entire document using either *Select All* or with the click-and-drag method (both options are available within *Edit*).
- *Copy --> File --> New --> OK* (in lower right).
- When a blank screen appears:
- *Edit --> Paste* (*Word*-version of your finding aid should appear) --> *File --> Save As*
- When the window appears, click again on the downward arrow within the small *Save in* box.
- Highlight *users\$ on 'Ulsdr100'(T:)*
- Find your folder
- Open it
- Click on the *Save* box. This entire procedure should save the *Word*-version of your finding aid in your folder. To verify, check the *Windows NT Explorer*

- Select *Start --> Programs --> Windows NT Explorer --> users\$*  
on 'Ulsdrl00'(T:)

Highlight your folder --> Double click --> Verify that finding aid is listed in your directory.

### Copy the appropriate EAD template.

- Open *Emacs*. Select *Programs --> GnuEmacs --> Emacs*
- The first screen will contain introductory "Welcome to Emacs" information.
- Choose *Files --> Open File*
- At the bottom of the *Emacs* screen (within the minibuffer), a file name will appear (Find file: *D:\Program Files\emacs2031\bin\*). You'll need to change the directory path.
- Type in one backward slash (changing the directory requires two backward slashes but normally, one slash will already be there), then the directory *Q:*, slash, file name (templates), and another slash. The direction of the slashes generally does not make a difference.

**Example:** This is the info that appears after *Open file*:

- Find file: *D:\EmcProgram\emacs2031\bin/*
- You will type in: */Q:/templates/*
- Final entry will look like this:  
*D:\EmcProgram\emacs2031\bin//Q:/templates/*
- Hit the *Tab* key THREE times. The screen should be split with the bottom screen containing the three template names (*aistemp.sgm*, *ustemp.sgm*, and *hswptemp.sgm*)
- Highlight the appropriate template.
- Enter. The template will appear.

- And, like the *Word*-version of the finding aid, you'll need to copy the template (highlight by using the click-and-drag method),

Choose *Edit --> Copy --> File --> Open File*

- The minibuffer should appear at the bottom of the screen.
- Change the directory to "*T*" again (or to whatever drive contains the "*users on 'Ulsdr100'*" directory), slash, your folder name, the finding aid/file number, period, sgm.

**Example:** *T: jahibe/hsmss117.sgm*

- Enter. A blank screen will appear.
- Choose *Edit --> Paste*. The template for your appropriate repository/finding aid should appear.
- Please ensure that the colored tags appear on your *Emacs* version. If, for example, your file name doesn't include the *.sgm*, the opening and closing tags will not appear in color. Sometimes the lack of color could be the person who logged onto the computer used a different password or there may be a long delay in the fontifying process. But if the file name does include the *.sgm*, the fontifying process is done and the tags still are not colored, check with your supervisor.

### Curator Notes

While you are encoding, if you come across any questions regarding the finding aid-such as incomplete or missing information, the tabbing on the *Word*-version is confusing, etc., you need to make a curator note. Either make a note on the finding aid itself, write any questions you may have on a separate piece of paper, or keep an email open and add to it as you go through the finding aid-whichever method you choose, curator notes are very important!

It's imperative that you keep track of your questions because when you're done, you'll be sending your supervisor an email listing the questions you may have. This list will then be sent to the curator at the appropriate repository and s/he needs to know exactly what and where the question is. For example, if the folders in Box 22, Series III are out of numerical sequence, you need to include that information. Simply state, "Box 22, Series III, no folder 5 is listed."

### **Encode your finding aid.**

Encode the document according to the Style Guidelines at <http://nessie.library.pitt.edu/ead/guidelines.html>. *Remember: Save and save often!*

### **The pre-encoded MARC record (Control Access terms)** **Historical Society of Western Pennsylvania**

For the HSWP search page, log on to *Netscape Programs --> Network Communications --> Network Communicator Netscape Navigator -->* Use the bookmark "Historical Society of Western Pennsylvania" or type in the address:  
<http://nessie.library.pitt.edu/ead/hswpeadsearch.html>.  
A search screen will appear.

- Enter some basic search terms of the collection title (e.g., for the Records of the Pittsburgh Public School, enter Pittsburgh Public Schools).
- Click on *Search*. A list will appear (with a green background screen).
- Find the appropriate title for your collection. If the title is a common one, such as Pittsburgh Public Schools, a long list of search results may appear and you need to be careful that you pick the right one.

Check the dates of your collection versus the dates on the HSWP search results.

- Once you find the appropriate title, click on the *EAD Encoded MARC*.
- Use the information listed in step #2 <accessinfo> for your controlled access terms.
- Copy and paste the appropriate terms from the HSWP's pre-encoding to your EAD-version. Check the [Style Guidelines](#) for more detailed information.

### Archives Service Center/University of Pittsburgh

In most cases, you will be able to get a pre-encoded MARC record from the bookmark of "EAD Search Bibliography" or <http://nessie.library.pitt.edu/ead/eadbibl/eadsearch.html>

Another possibility to try is PITTCat Online Catalog. If you need help with PITTCat, please check with your supervisor.

### After Encoding . . .

- Before you exit *Emacs*--

When you finished with encoding and validating the EAD-version of your finding aid, the first thing to do is to save it in the proof directory.

Choose *Files --> Save Buffer As*

In the mini-buffer at the bottom of the page, type in (don't forget the double slash to change the directory):

**Example:** *Q:/proof/hsmss117.sgm*

After you've saved it to the "proof" file, you need to print out the EAD-version.

*Tools --> Print Buffer --> Postscript Buffer*

Exit *Emacs*.

- Converting EAD into HTML

Open the MS-DOS Command Prompt

*Programs --> Command Prompt*

A black screen/window will appear with a *C:* prompt.

- After the blinking cursor, type in the drive you wish to change it to (which will almost always be the "users\$ on 'Ulsdri00'[T:]") and a colon.

**Example:** *C:* \> *T:*

- Enter.
- The prompt will now read *T:*
- Enter the command **cd** (for "change directory") and the folder title in which the EAD finding aid is located (usually that will be your folder).

**Example:** *T:*\>**cd jahibe**

- Enter. The prompt will now read: *T:\foldername*
- Enter (without the word "space") **perl.exe** (space) **Q:/review/review.pl** (space) **filename**

**Example:** *T:\jahibe*>**perl.exe Q:/review/review.pl hsmss117.sgm**

- Enter.

If you correctly identified the pathname, "processing filename" with a blinking cursor will appear. When the computer is finished the converting process, the *T:* *|foldername|* prompt will appear again. The shorter the EAD-version, the quicker the processing time. If the finding aid is long, it might take awhile.

- Exit Command Prompt.
- Netscape/Print HTML version
  - Open *Netscape* again

*Programs --> Network Connections --> Network Communicator -->*

*Netscape Navigator --> File --> Open Page.*

A small window entitled *Open Page* will appear.

- Choose *File* (right hand side)
- Another small window *Open* will appear.
- Click on the small down arrow in the *Look in* box,
- Drag-and-click on the directory you wish (*users\$ on 'franny'*),
- Highlight the folder you wish to open. The HTML files you have processed should be listed (if nothing appears, check the *Files of type* box at the bottom of the *Open* box to ensure that "HTML files" is the type of file.)
- Open. Make sure a directory and file name appears in the *Open Page* box when the *Open Page* window reappears.

- Click open again. If you followed the steps correctly, the HTML version of your finding aid should appear.

*File --> Print* (a small window entitled "Print" should appear)  
*--> Properties --> Long Side* (bottom right) *--> Okay*  
(bottom right) *--> Okay* (bottom right).

Exit *Netscape*.

Now you're done printing and can pick up the HTML-version and EAD-version of the finding aid from the printer.

- Email, update database and curator notes

Send an email to your supervisor notifying him/her that you're finished encoding and your finding aid is ready for proofing. *Include the curator notes!* Also, the subject title of your email should include the collection number.

- Open the *Access* database again

Program --> Office97 --> Microsoft Access --> q:  
\admin\tracking

- Update the appropriate form for "Hours Encode" and "Encode Complete"
- Once you've completed all of these steps, you need to paperclip the following documents together: the EAD-version of the finding aid (stapled), the HTML-version of the finding aid (stapled), the original finding aid and the tracking sheet (with appropriate information completed). Place all items in your supervisor's box.

## Proofing Procedures

Make sure that you have all three required documents-the EAD printout, the HTML version and the original finding aid-as well as the tracking sheet. The easiest way to check for errors is to proof the HTML version first, then annotate the EAD printout. You need to proof BOTH, however, because there may be errors in the EAD that don't show up on the HTML (unitdate type, for example). And for the encoder correcting his/her mistakes, it's easier to correct from the EAD version so keep that in mind as you mark the corrections. Please make the corrections in an obvious manner (pen is best), and annotate them on the EAD version.

The proofer also will enter the amount of time it took on the tracking sheet and return all the documentation (including a printout of the curator notes from email) to the encoder for corrections.

### **Things to look for:**

- The obvious-typos, incorrect tagging, missing information, misspelled words, dates not entered correctly, etc.-and then the not-so-obvious: unitdate types, the dates of collection match the finding aid, boxes and folders are numbered sequentially, etc.
- Check to ensure there is an ID on the opening EAD tag (for alpha sorting).
- Make sure that all required dates have a "normal" attribute (with 8 numeric normalization).
- Review the container list in the HTML version against the original finding aid to verify if component levels are correct.
- Review encoding to ensure that unititles and dates are split correctly (i.e., with a space between them)
- Check to ensure that all collection level description information is included. It's easy to accidentally delete a word or phrase when copying and pasting information. Arrangement and organization

information, for example, should be deleted from the scopecontent notes.

- Look for empty elements that may not have been deleted (e.g., custodial history)
- Read the abstract and ask yourself, if you were the user, "would this information help or hinder me?" In other words, does the abstract give a very BRIEF overview of why the collection is important and what's in it?

### Corrections

The proofer will return the finding aid to the original encoder for corrections.

The encoder will make corrections to the EAD version. Upon completion, save the corrected version in *Q: corrected/filename*. Enter the relevant information on the tracing sheet and don't forget to update the *Access* database!

Notify your supervisor by email when the correction is completed. Return all papers to your supervisor.

### Final Modifications

When a batch of finding aids have been encoded, proofed and corrected, the supervisor sends the batch (along with curator notes) to the curator for review. When the finding aids return from the curator, the encoder will make the appropriate changes and modifications (entering the date and amount of time in Access database). If there are no modifications, the worker will record the date that it was returned and enter the name of the curator who reviewed into the EAD version of the finding aid in the <processinfo> section of the finding aid.