
EAD3 and the consequences of the new version

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APEx



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Overview

- Aims of revising EAD (Encoded Archival Description)
- Steps undertaken so far
- Current status of the revision process
- Use of EAD in the Archives Portal Europe
- Impact of the revision of EAD
 - On the Archives Portal Europe
 - On the Archives Portal Europe's content providers
- Outlook – aspects of defining apeEAD3

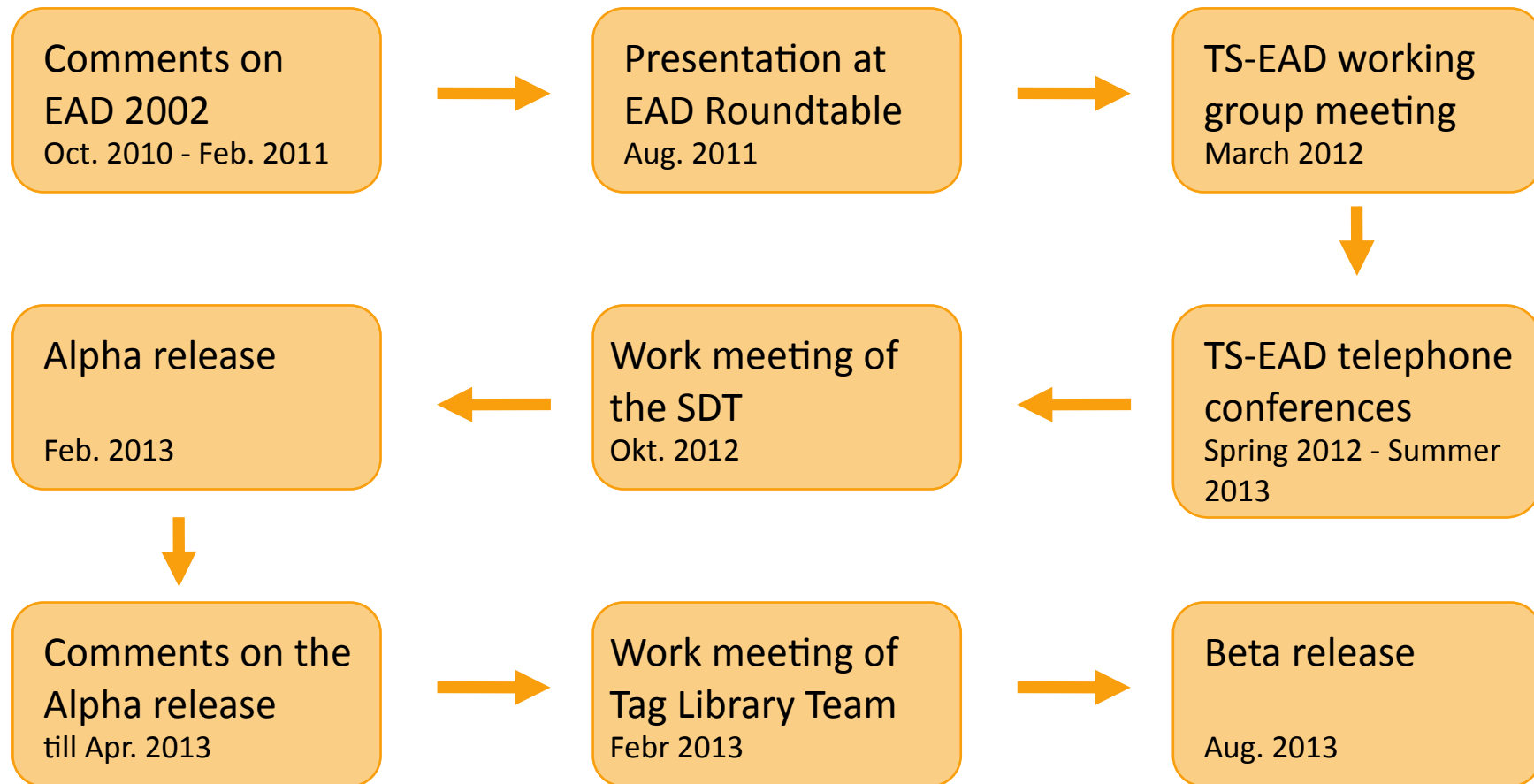
Aims of revising EAD

- Improve the interoperability with other archival standards
 - Especially with regard to
 - » EAC-CPF (Encoded Archival Context – Corporate Bodies, Persons, and Families)
 - » METS (Metadata Encoding and Transmission Standard)
 - » PREMIS (Preservation Metadata: Implementation Strategies)
 - That is
 - » To orientate a new version of EAD to solutions found when creating EAC-CPF
 - » To possibly include namespaces in a new version of EAD
 - » To define where and how documents in other standards can be linked, i.e. which element and which attribute would be used with which value

Aims for revising EAD

- Improve the exchange of EAD files
 - That is
 - » To be more definite on how to encode certain information
 - » To minimise the amount of elements in total
 - » To concentrate on encoding the data, not their presentation (question of elements like <head>, <table>, <emph>)
 - » To minimise options for mixed content
 - With regard to
 - » Multilingual environments
- Include respectively reference user generated content
- Define/ensure of the migration from previous versions of EAD

Steps undertaken so far



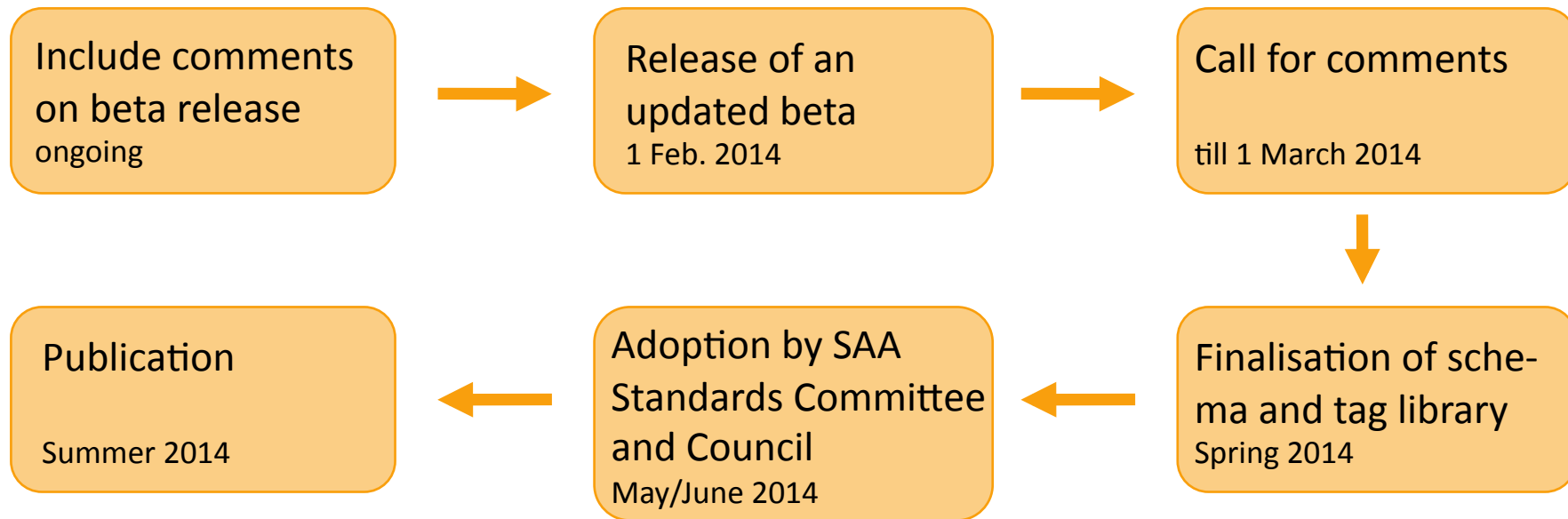
After the beta release

- August 2013:
 - New call for comments open until 1 October 2013
 - <https://github.com/SAA-SDT/EAD-Revision>
- Joint meeting of the TS-EAD and the TS on EAC-CPF (TS-EAC)
 - In the context of the Annual meeting of the SAA
 - » Presentation of the current status and timeline
 - » A name: EAD3
 - » Discussion of pending issues such as licencing of the schema and the tag library, <relations>, etc.

Current status

- Ongoing:
 - Several telephone and online conferences of the TS-EAD and its subgroups
 - » To review and discuss all bugs and comments received from the EAD-community, the TS-EAD list, and during the Tag Library meeting(s)
 - » To decide for solutions on pending issues
 - » To prepare for their integration in a beta release

Outlook



Information and current status at

<https://github.com/SAA-SDT/EAD-Revision>

Decisions so far (I)

- On certain elements
 - Numbered and unnumbered <c> elements
 - » Both will be maintained
 - <*name> and <*nameentry> elements
 - » With regard to indexing elements (e.g. <persname>, <geogname>, etc.)
 - » Alpha release contained distinction between elements for encoding names (<*name> elements) e.g. for searching and elements for referencing external vocabularies / ontologies (<*nameentry> elements)
 - » Beta release decided for **general use of <*name> elements for both**
 - » Available as subelements of <controlaccess>/<indexentry>, <origination>, <repository> and <p> etc.

Decisions so far (II)

- On certain data models
 - Structured/unstructured pairs
 - » E.g. <unitdate> and <unitdatestructured>, the latter similar to EAC-CPF
 - » E.g. <physdesc> and <physdescstructured>
 - » E.g. <langmaterial> and extensions for <origination> and <repository>
- With regard to reconciliation with EAC-CPF
 - Using <control> instead of <eadheader> for administrative data on the EAD file itself
 - <relations>
 - » Currently available on <archdesc> and <c> elements, plus as extra block
 - » Feedback on beta release welcome specifically with regard to use cases for relations in the one or the other context

Decisions so far (III)

- On general aspects
 - Naming of elements and attributes
 - » Alpha release contained „Camel notation“ for all elements and attributes
 - > raising the barrier for backwards compatibility
 - » decision to stick to small letter names
 - Documentation
 - » Feedback on alpha release also with respect to documentation of changes; not only via the Tag Library, but also within the schema itself
 - » Beta release was published together with updated Tag Library

Decisions so far (IV)

- Further aspects of the beta release
 - Unnesting certain elements
 - » E.g. <arrangement> no subelement of <scopecontent> anymore
 - » E.g. <legalstatus> no subelement of <accessrestrict> anymore, but uses in parallel
 - » E.g. <unitdate> no subelement of <unittitle> anymore
 - Naming of <*note> according to context
 - » <didnote>, <controlnote>, <descriptivenote>, <footnote>
 - Supporting multilingual encoding
 - » @lang and @script available for all elements containing text

Decisions so far (V)

- Elements no longer recommended for use
 - <frontmatter>
 - <eadgrp>, <archdescgrp>, <dscgrp>, <descgrp>, <daogrp>, <linkgrp>
 - <runner>
 - <note>
 - Subelements of <bibref> (i.e. <bibseries> and <imprint>)
- Further additions
 - <container@containerid>
 - <recordid@instanceurl>
 - <representation>

„Delivery package“ for EAD3

- Updated schema
- Update Tag Library
 - Introduction and information on the revision
 - Definition of elements and attributes
 - Crosswalks
 - Examples
- Stylesheets for migration from EAD 2002 to EAD3
- Additional Validationtools (Schematron), e.g. to validate against certain ISO standards (dates)

Use of EAD in the Archives Portal Europe

- Definition of a central EAD profile - apeEAD:
 - <http://www.archivesportaleurope.net/Portal/profiles/apeEAD.xsd>
 - Based on comparison of existing use and usage of EAD within the partner countries and institutions
 - Aiming at central presentation and functionalities
 - Used as
 - » Target format for conversion from local data formats
 - » Target format for validation
 - » Basis for central presentation
 - » Basis for central search index
 - » Basis for further conversion e.g. into the Europeana Data Model (EDM) for exchange of archival data

Impact of the revision of EAD on the Archives Portal Europe

- Question of moving to the new version of EAD once finalised:
 - The APEx being a Best Practise Network – most likely to adopt the new version
 - Depends on
 - » Finalisation schedule for EAD revision vs. lifetime of the project
 - » Advantages offered by the new version vs. workload resulting from its adaptation
 - » Possible impact not only on the central installation itself, but mainly on the content providers
 - APEx WP4 will in any case analyse the new version and define an updated apeEAD based on EAD3 in preparation for the actual technical changes

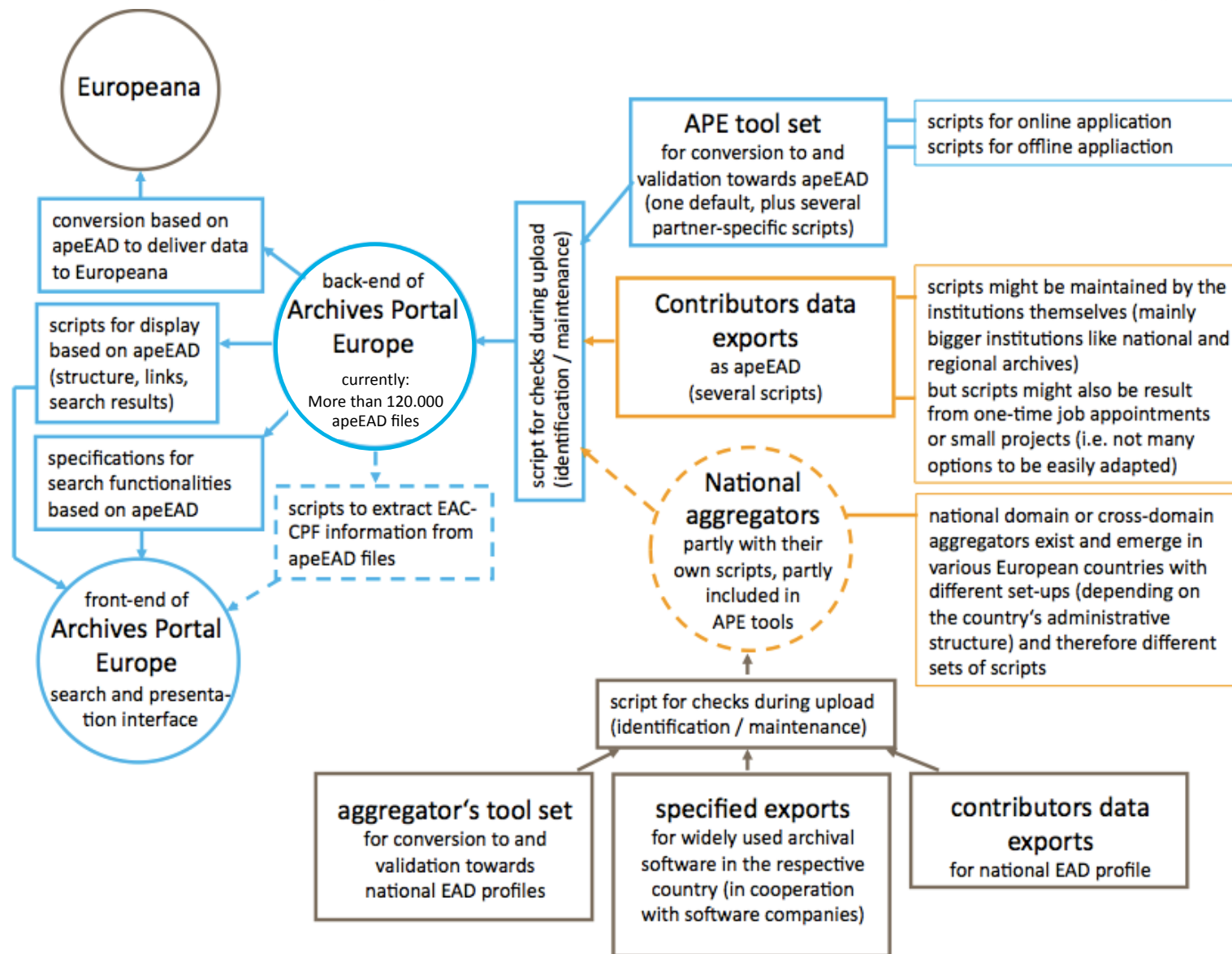
What's to be taken into account for possible adaptation of apeEAD?

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Definition of apeEAD in EAD3

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Aspects

- <eadheader> will get to be <control>
 - attributes from <ead> and <eadheader> are moved to different elements
 - elements will be named differently, e.g. <eadid> gets <recordid>
 - some mandatory elements are new, e.g. <maintenancstatus>
- > might be the main challenge as it affects maintenance data used in the backend of the Archives Portal Europe

Aspects

- some subelements of <did> have changed
 - <origination> gets mandatory subelements
 - <repository> gets mandatory subelements
 - <physdesc> gets structured and unstructured version
 - <unitdate> gets structured and unstructured version
 - smaller adaptations such as <note> getting <didnot>

Aspects

- siblings to <did> (e.g. <scopecontent>, <bioghist>)
 - remain mainly unchanged
 - structure for <table> is simplified
 - <extref> and <extptr> are not used anymore -> <ref> and <ptr>

Aspects

- EAD3 allows for multilingual content with @lang and @script
- EAD3 allows for more structured information
(remains to be seen, where that can be of advantage for the Archives Portal Europe)
- EAD3 allows for more structured relation(ship)s encoding
(remains to be seen, how (far) the Archives Portal Europe will make use of this option)

Questions?

Thank you very much for your attention 😊

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