Adding EAD-Encoded Finding Aids in CONTENTdm

This tutorial leads you through the steps for configuring collections for use with the Add Finding Aid functionality in the CONTENTdm Project Client, tips for creating finding aids encoded using Encoded Archival Description (EAD) that work smoothly with CONTENTdm, and using the Add Finding Aid wizard to add EAD encoded archival finding aids to CONTENTdm collections. To successfully complete this:

- The CONTENTdm Server must be running.
- You have one or more existing collections in CONTENTdm with metadata fields mapped to Dublin Core.

Learn About

Section 1: Overview

You can use the Project Client Add Finding Aid wizard to add archival finding aids encoded using Encoded Archival Description (EAD) to your CONTENTdm collections. The Project Client processes the EAD and enables you to:

- Define a metadata mapping for the EAD tags
- Select options for displaying the EAD as a compound object
- Select a custom Extensible Stylesheet Language (XSL) file to govern the display of the Full Finding Aid view
- Select a custom thumbnail
- Manage an archival copy of the EAD by using the Archival File Manager

When added to your Project Client project, the finding aid is converted to HTML and processed as a compound object. After you upload it to the server, and it is approved and indexed, end users can search the full text of the finding aid and see highlighted search results.

In this tutorial, we will process a sample finding aid by using the Add Finding Aid wizard and discuss options for customizing finding aid displays.

Section 2: Collection Configuration

Before adding finding aids, configure your collection for optimal use by designating a full text search metadata field into which the full text of the finding aid will be copied. For granular metadata mapping, map the metadata fields to Qualified Dublin Core.

For this tutorial, we have created the Finding Aids collection using the default Qualified Dublin Core template and an additional full text field.

For more information about setting field properties, see **Field Properties**. For more information about configuring your collection, see **Accessing and Editing Collection Configuration**.

If you would like to archive the original EAD XML for the finding aid, you may use the **Archival File Manager**. When used with finding aids, the Archival File Manager copies the original XML file to the current volume during import. (Note that stylesheets are not included in the volume.)

Section 3: Creating EAD Encoded Finding Aids for CONTENTdm

After your collection is configured, use the following tips to create an EAD file that can be processed by CONTENTdm.

- Make sure the EAD is a valid XML document. If the XML is badly formed, the EAD will not be processed.
- Make sure the EAD is encoded using UTF-8 or ANSI. If another form of encoding is used, the EAD will not be processed. To change the encoding, use an XML editor and save as UTF-8.
- Use absolute URLS. If the EAD refers to a file or page on the Web, use the complete URL instead of a relative path.
- Remove references to local files. If a reference to the local file is between the <xml> and <ead> tags, it will be removed, and the EAD will be processed without using the referenced file. If the reference to the local file is within the <ead></ead>, EAD processing will fail.

- Confirm all references to external XSD or DTD files are accessible. If the externally referenced XSD or DTD is available, the finding aid will be processed using it. If the externally referenced XSD or DTD is not available, the finding aid will be processed using the publicly available Library of Congress EAD XSD/DTD. If the Library of Congress EAD XSD/DTD is not available, EAD processing will fail.
- Use the following list of values for <container type= >. If a finding aid uses a value for <container type= > other than the values defined below, it may not display properly.

> carton
> box
> folder
> reel
> frame
> oversize
> reel-frame
> volume
> map-case
> box-folder
> page
> folio
> othertype

Section 4: Using the Add Finding Aid Wizard

Use the Add Finding Aid wizard in the Project Client to add single, EAD-encoded finding aids to your CONTENTdm collections.

Note: Before using the wizard, review your finding aid to be sure it complies with the processing rules in Section 3.

Note: If your EAD implementation uses the <thead> tag, you will need to change the CONTENTdm default stylesheets before using the wizard. See **Step 7** for instructions.

Step 1: Select a finding aid and corresponding thumbnail

1. Open an existing project in the Project Client. In this example, we are using the Finding Aids project and the Finding Aids collection.

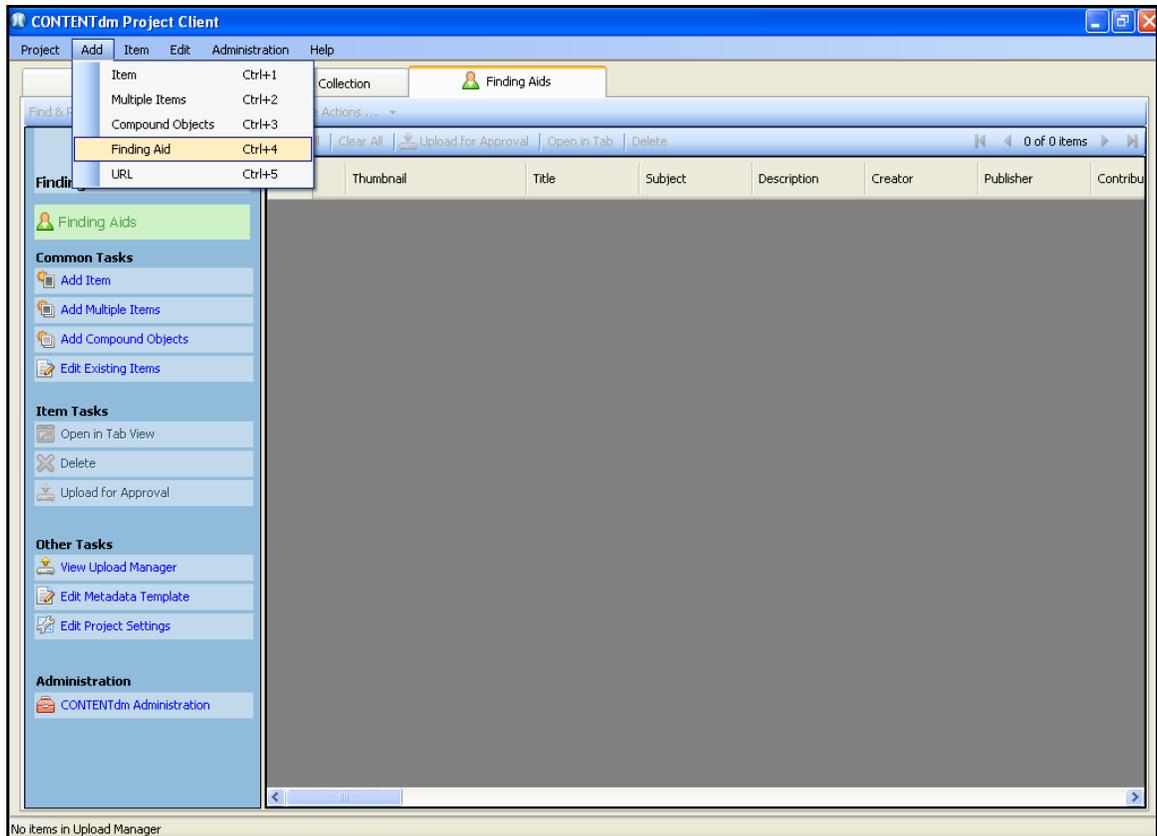2. From the **Add** menu, click **Finding Aid**.

Figure 1: Menu option, Add Finding Aid
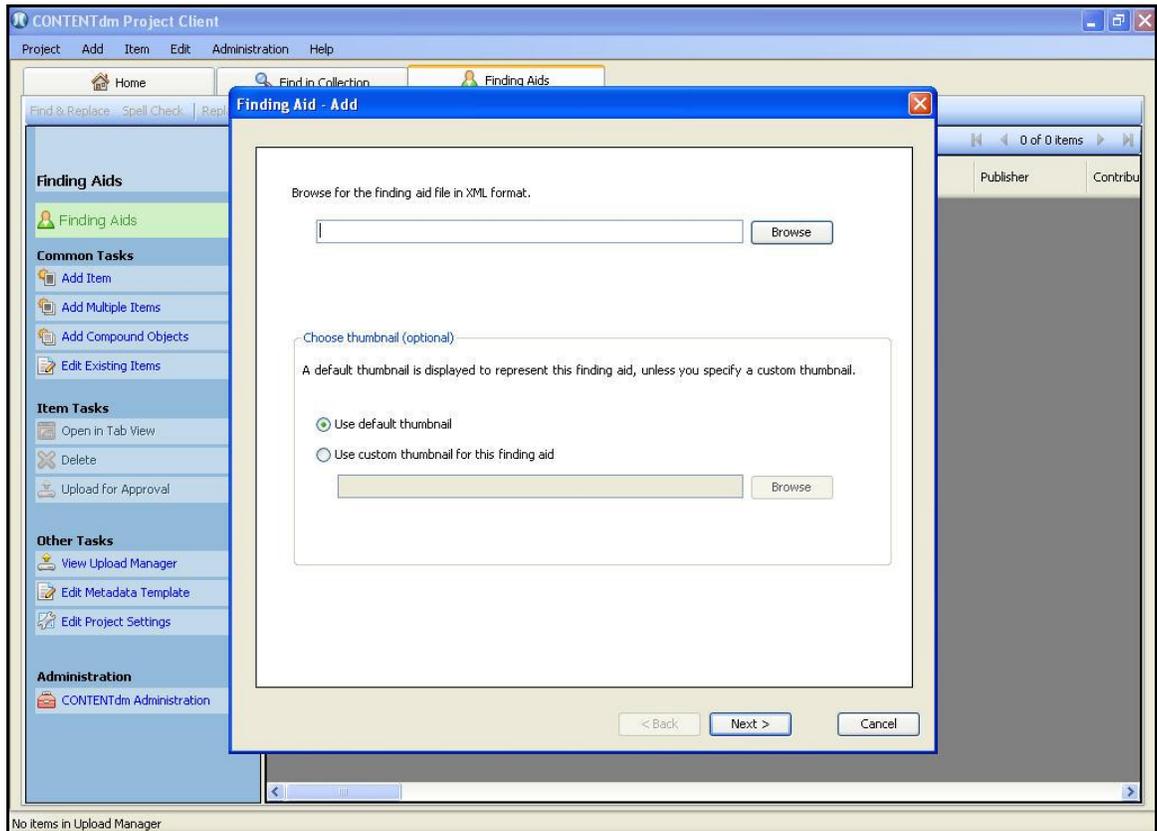
3. The Add Finding Aid wizard displays.

Figure 2: Add Finding Aid wizard

4. Click **Browse** to select the finding aid you want to add. In this case, the finding aid **"A Guide to the Curatorial Office Records of the Prints and Drawings Department, 1952-1996"** has been selected.
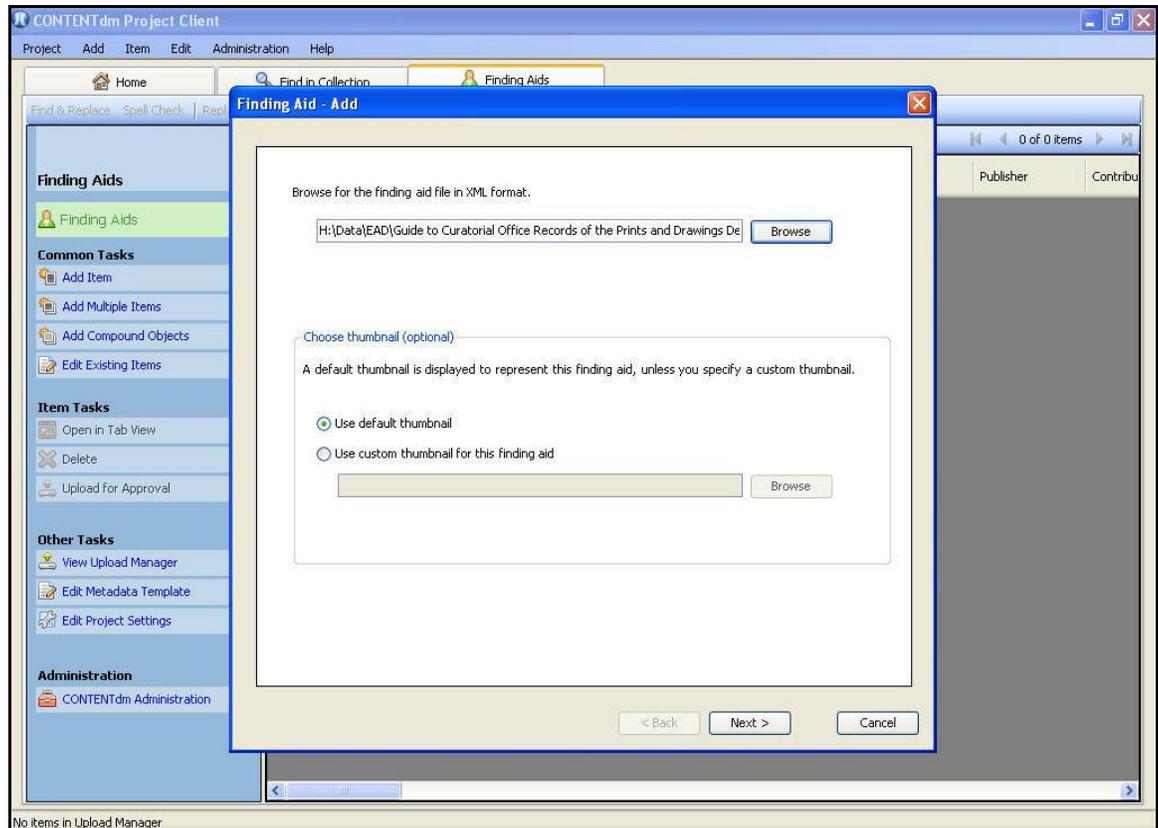
Figure 3: Select finding aid

You can use the default finding aid thumbnail, or a custom thumbnail.

5. If you want to use a custom thumbnail for this finding aid, select **Use custom thumbnail for the finding aid.** Then click **Browse** to select the custom thumbnail image you would like to use.
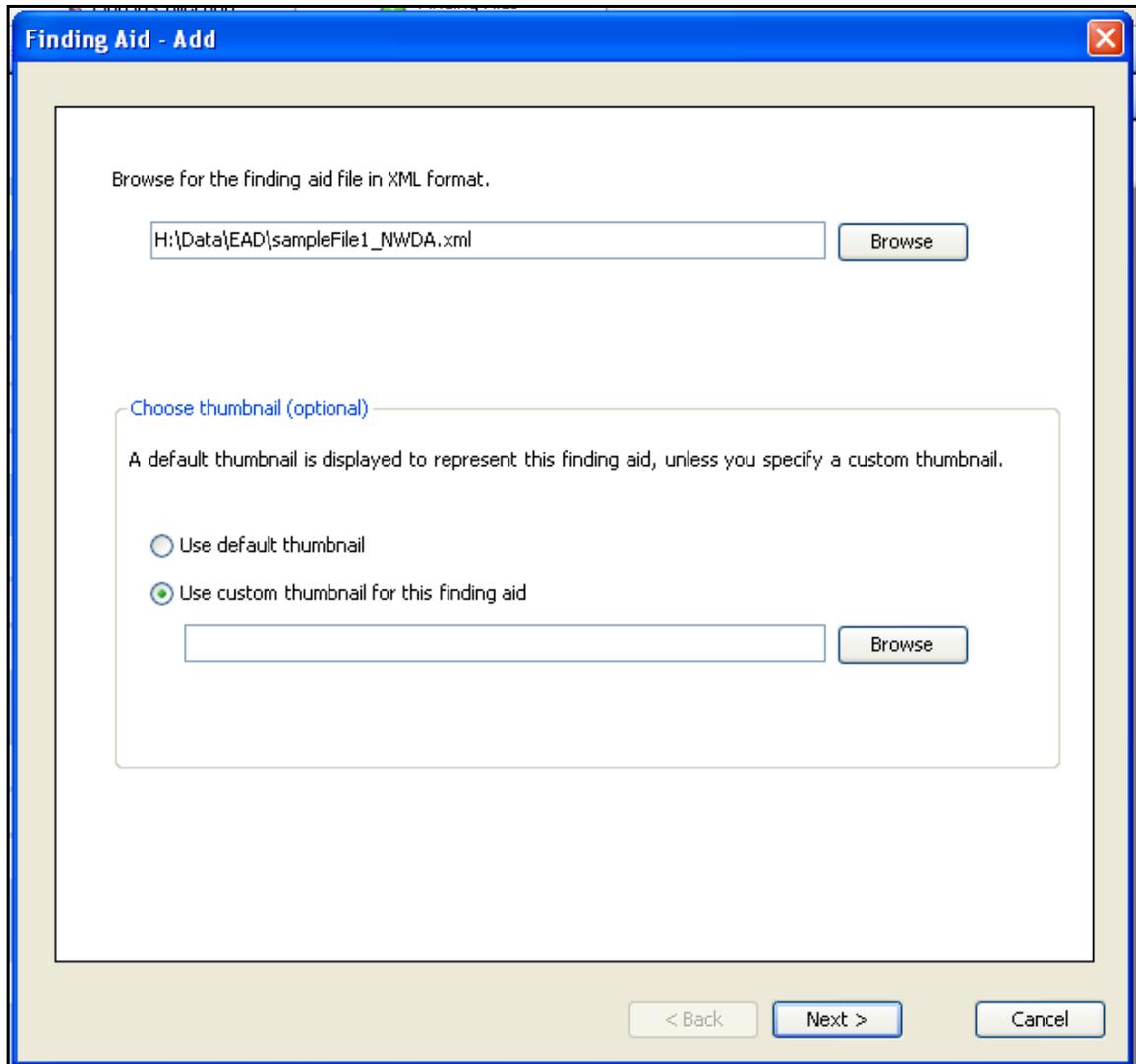
Figure 4: Use custom thumbnail

For the example in this tutorial, we have used the default thumbnail image.

6. Click **Next.** A progress screen displays while the finding aid is being processed.

Step 2: Map metadata fields

Note: This mapping applies to the compound object-level metadata only. Page-level metadata is not mapped.

On the left of the mapping interface, the wizard displays the mappable tags found in your finding aid, while the right side displays a drop-down list of the collection's metadata fields. Use the drop-down list to select a collection metadata field for the EAD tags you want mapped in your collection metadata. See **Available Tags for Metadata Mapping** for a list of the tags that can be mapped.

The first time you add a finding aid into your project, the wizard displays a default metadata mapping. If you change the default mapping, the wizard retains those settings for subsequent finding aid imports in this project. If any of the Dublin Core fields used in the default map do not exist in the CONTENTdm collection, the EAD field is mapped to None.

To edit a metadata mapping

1. Click the drop-down list for the appropriate collection field. A list of mappable fields displays.

2. Click the metadata field to which you want to map the EAD tag. In this case, we are mapping the <ead><archdesc><bioghist> tag to Dublin Core description. By doing this, we have mapped two tags to Description — the <bioghist> and the tags. The data from within both tags will be included in the Description field separated by a semi-colon.
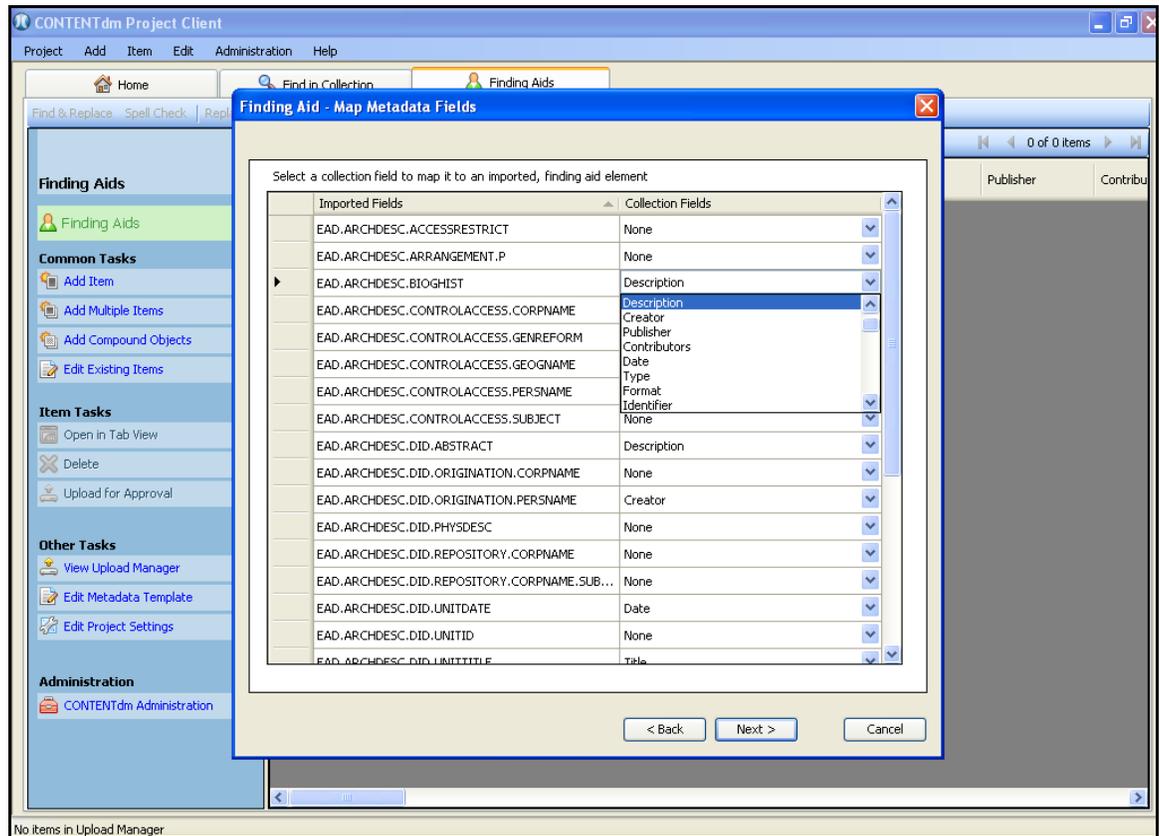
Figure 5: Customize the metadata mapping

Next, we want to remove the metadata mapping for the <ead.archdesc.did.unittitle> tag. The default mapping for this tag is to Dublin Core Title. However, we would like to use a different mapping for Title.

To unmap a field

1. Click the drop-down list in the corresponding Title field.

2. Scroll down the list of metadata fields and click **None**. This indicates there is no mapping for the <ead.archdesc.did.unittitle> tag.
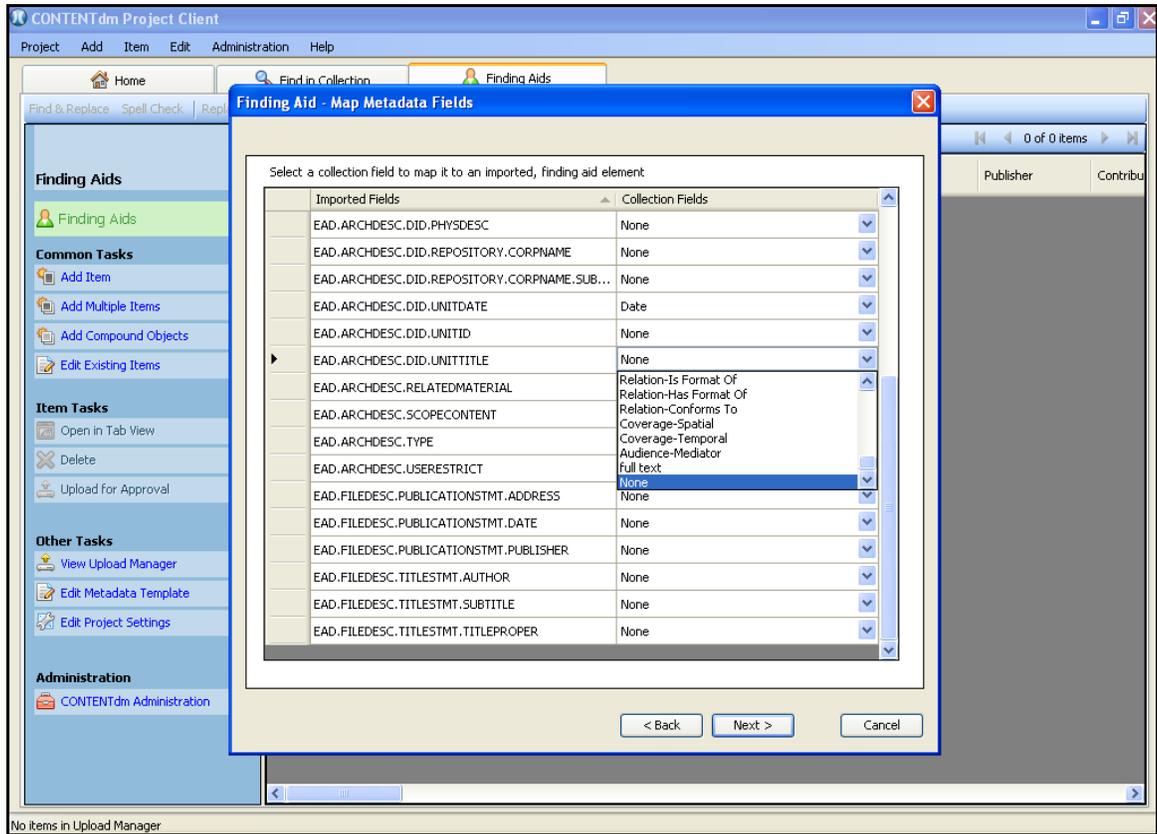
Figure 6: Unmapping a tag

3. Finally, we want to map the <ead.filedesc.titlestmt.titlepropoer> tag to the Dublin Core Title field. Click the drop-down list in the corresponding Collection field.

4. Scroll down the list of metadata fields and click **Title**.
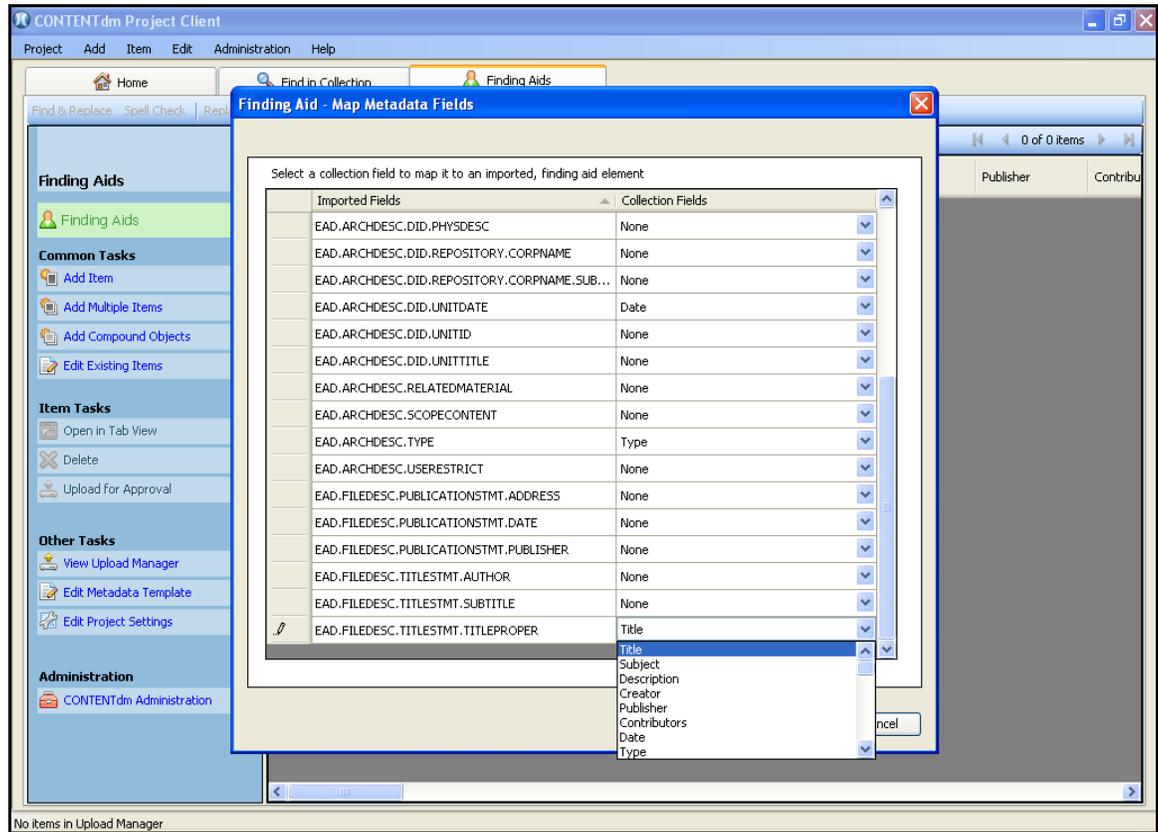
Figure 7: Adding a metadata mapping

5. When you are done editing the metadata mapping, click **Next**.

Note: The EAD tags are not included in the extracted data added to the metadata record for the finding aid; only the data from within the tags is displayed.

Step 3: Define the compound object for the Description section of the finding aid

The compound object finding aid display is made up of several HTML pages, depending on the settings you use for formatting. Within the Add Finding Aid wizard, the formatting options are divided into two sections, one for the Description and one for the Contents List.

The Description section displays data within the <eadheader> and <archdesc> tags.

There are two formatting options for the Description pages of the compound object.

- Display as single page
- Break into sections and display as separate pages

Display as single page generates a single compound object page using the data contained in the tags listed below:

Page #	Page Title	Data from these tags displayed in the HTML page
1	Generated from data within the <archdesc><did><unittitle> tag	<eadheader><filedesc> <eadheader><profiledesc> <archdesc><did> <archdesc>< <descgrp> <archdesc> <archdesc><accessrestrict> <archdesc><arrangement> <archdesc><prefercite> <archdesc><scopecontent> <archdesc><bioghist> <archdesc><controlaccess> <archdesc><relatedmaterial> <archdesc><userestrict> <archdesc><separatedmaterial>

Break into sections and display as separate pages generates multiple compound object HTML pages using the data contained in the tags listed below:

Page #	Page Title	Data from these tags displayed in the HTML pages
1	Collection overview	**If <frontmatter> exists, the following tags display:** <frontmatter> <archdesc level="collection"> <did> <archdesc level="collection"> <did><physdesc> <archdesc level=" "> <did><origination> <archdesc level=" "><custodhist> <archdesc level=" "><acqinfo> <archdesc level=" "><processinfo> <archdesc level=" "><altformavail> **If <frontmatter> does not exist, the following tags display:** <eadheader><filedesc> <titlestmt> <titleproper> <eadheader><filedesc> <titlestmt><author> <eadheader><filedesc><publicationstmt> <archdesc level=" "> <did><physdesc> <archdesc level=" "> <did> <archdesc level=" "> <did><origination> <archdesc level=" "><custodhist> <archdesc level=" "><acqinfo> <archdesc level="collection"><processinfo> <archdesc level="collection"><altformavail>
2	Biographical history*	<archdesc><bioghist>
3	Scope and content*	<archdesc><scopecontent>

4	Arrangement*	<archdesc><arrangement>
5	Using the Collection*	<archdesc><accessrestrict> <archdesc><userestrict> <archdesc><prefercite>
6	Related materials*	<archdesc><relatedmaterial>
7	Separated materials*	<archdesc><separatedmaterial>
8	Subject terms*	<archdesc><controlaccess>
9	About the finding aid	<eadheader><profiledesc> <archdesc level="collection"><descgrp><processinfo>

* If a finding aid file includes this tag in a location other than <archdesc>, it will not be processed as a page in the compound object.

Deciding which option to use

Finding aids with minimal data for the tags included in the Description section display best with the single page option. Finding aids with significant amounts of data may display best broken into several pages to reduce end-user scrolling through a very long Description page. You may want to experiment with both options to determine which option is appropriate for your finding aids and the end-user experience.

To select a Description display option:

1. Click the radio button for the Description compound object display option you want to choose.

    In this case, we are using the **Display as a single page** option.
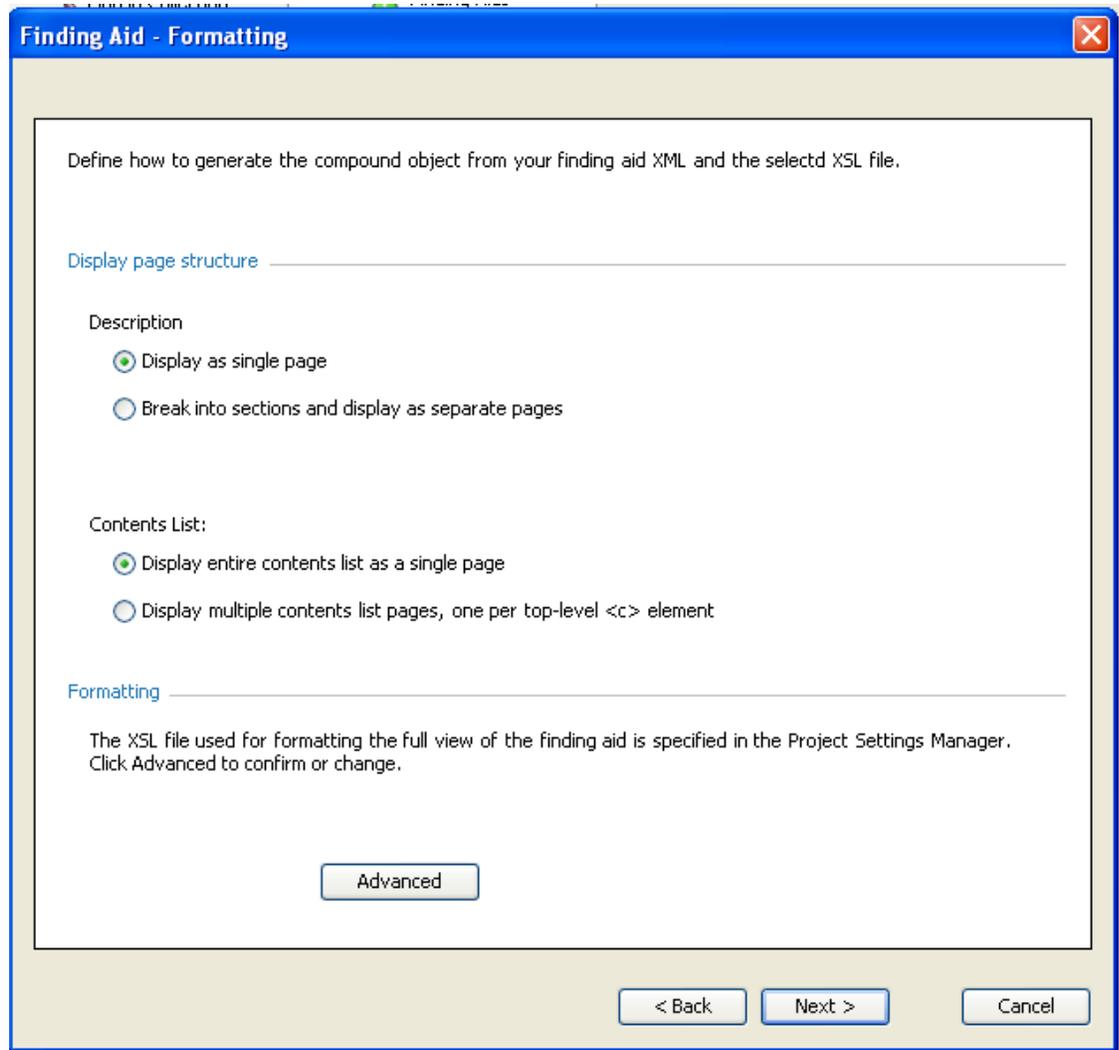
Figure 8: Display description as a single page

Step 4: Define the compound object for the Contents List section of the finding aid

The compound object finding aid display is made up of several HTML pages, depending on the settings you use for formatting. Within the Add Finding Aid wizard, the formatting options are divided into two sections, one for the Description and one for the Contents List.

The Contents List section refers to the data within the <archdesc><dsc> tag.

There are two formatting options for the Description pages of the compound object.

- Display entire Contents List as a single page
- Display multiple Contents List pages, one per top level <c> element (or <c01>)

Display entire Contents List as a single page generates a single compound object page from the Contents List that contains the following data:

Page #	Page Title	Data from these tags displayed in the HTML pages
1	Contents List	<archdesc><dsc>

Display multiple Contents List pages, one per top level <c> element (or <c01>) generates multiple compound object pages from the Contents List. One page is created for each level-one <c> tag:

Page #	Page Title	Data from these tags displayed in the HTML pages
1	Generated from data within the <c01><did><unitttitle> tag	<archdesc><dsc> data coded before the <c01> and all data within first <c01></c01>
2 and higher	Generated from data within the <c01><did><unitttitle> tag	Beginning with the second instance of <c01></c01>, one page is created per <c01>/c01>

To select a Contents List display option:

Select the radio button for the Contents List compound object display option you want. In this case, we are using the **Display entire contents list as a single page** option.
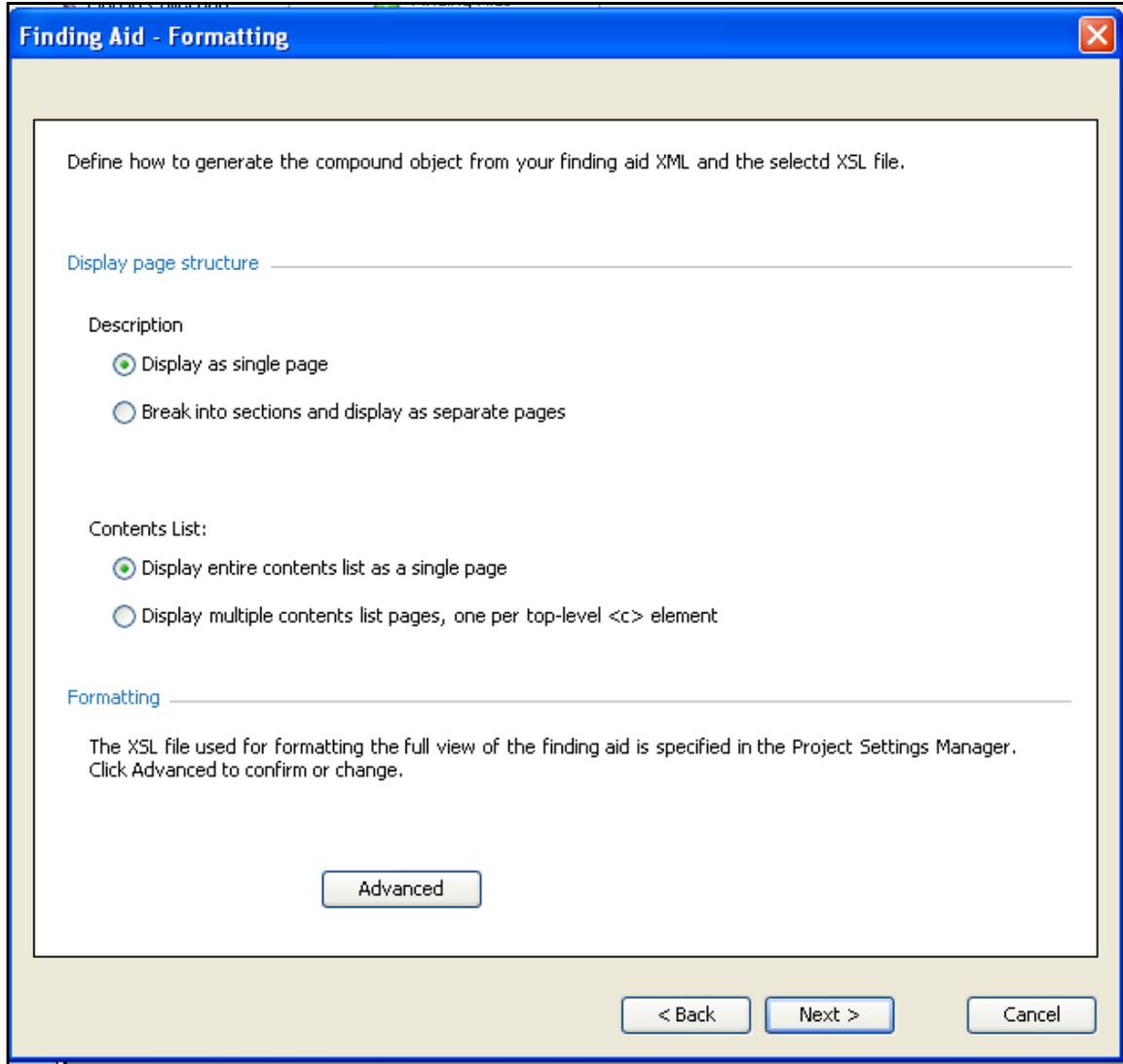
Figure 9: Display Contents List as a single page

Step 5: Use a custom stylesheet for the Full Finding Aid display (optional)

The finding aid processing not only creates the compound object view of the finding aid described in Step 4, but also generates a Full Finding Aid View. This view is an HTML representation of the entire finding aid and is generated using a default, full finding aid stylesheet. Alternatively, you have the option of using a custom stylesheet for the Full Finding Aid view.

To select and use a custom stylesheet for the Full Finding Aid View

1.   Click **Advanced** to select formatting for the full view of the finding aid. The Project Settings Manager displays the Processing Settings page.
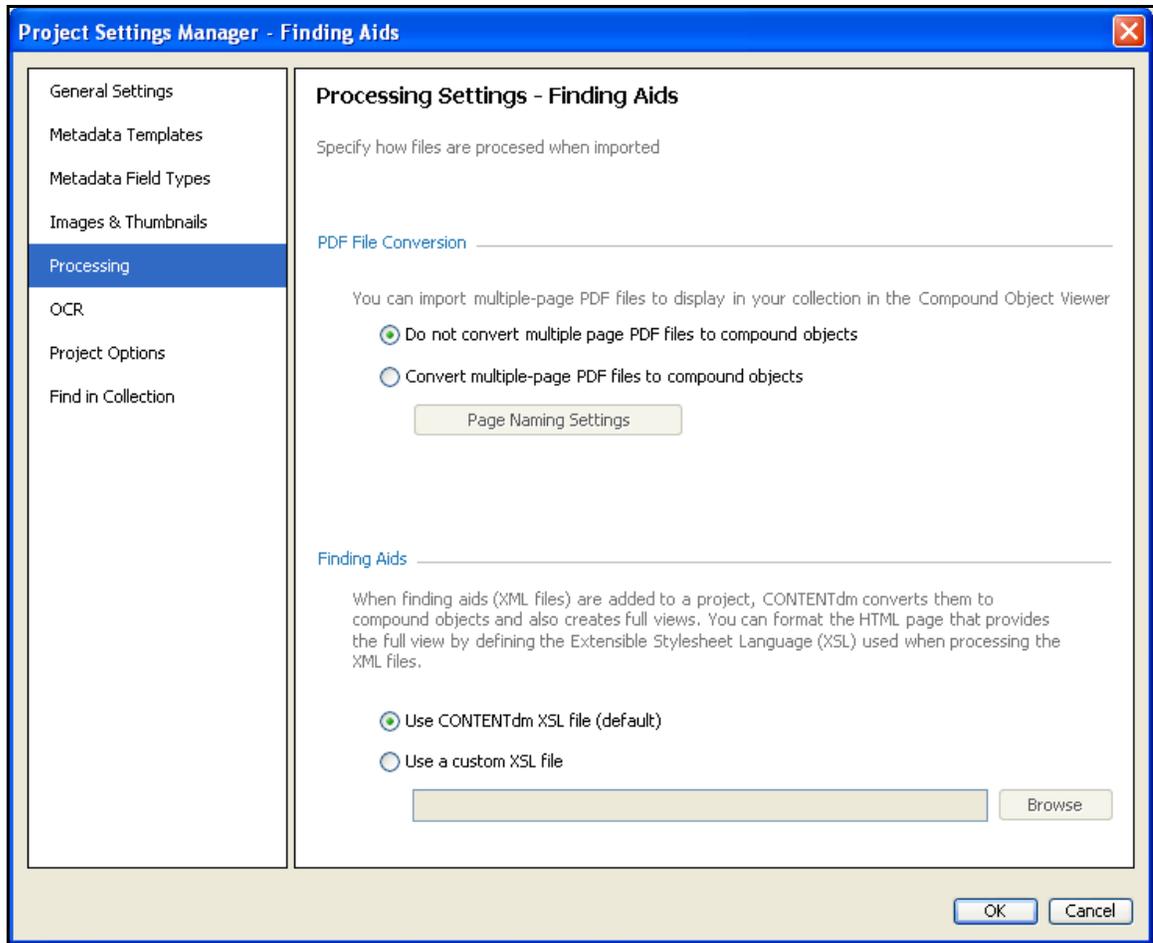
Figure 10: Use a custom XSL file

The default CONTENTdm XSL file is selected by default. You can choose a custom XSL file to customize the display of the full finding aid. Under the Finding Aid section, click **Use a Custom XSL File**.
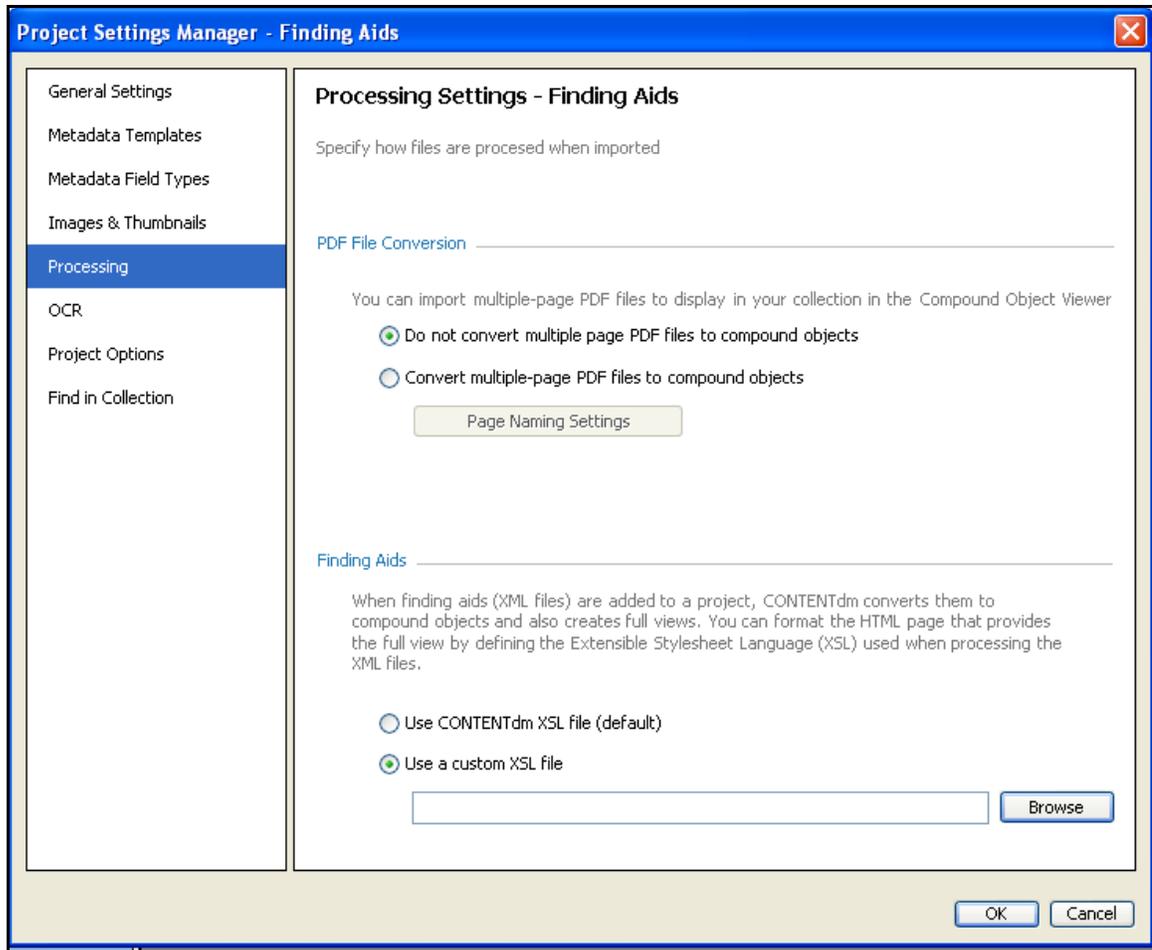
Figure 11: Use a custom XSL file

2. Browse to select the XSL file that you want to use, and click **Open**.
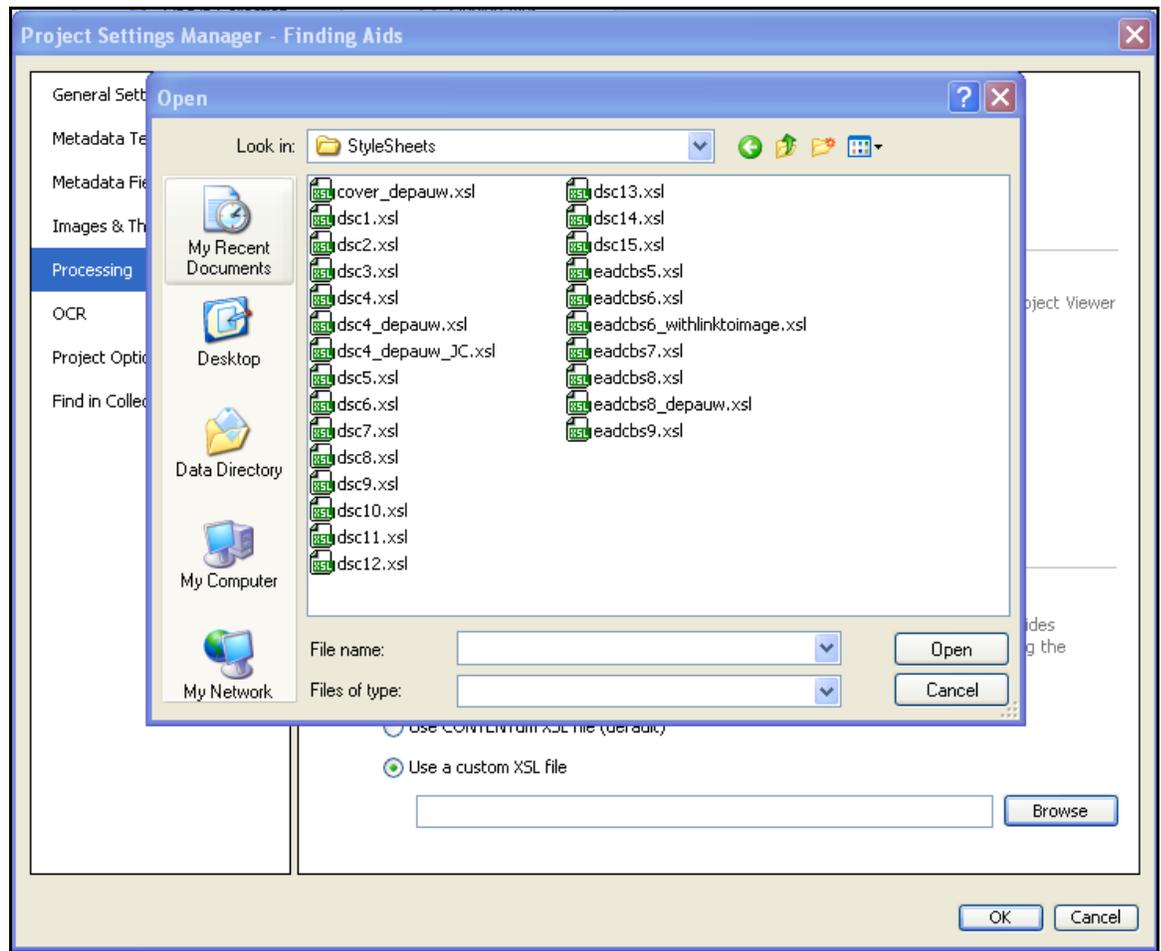
Figure 12: Select a custom XSL

3.   Click **OK** to save your settings and return to the Add Finding Aid wizard.
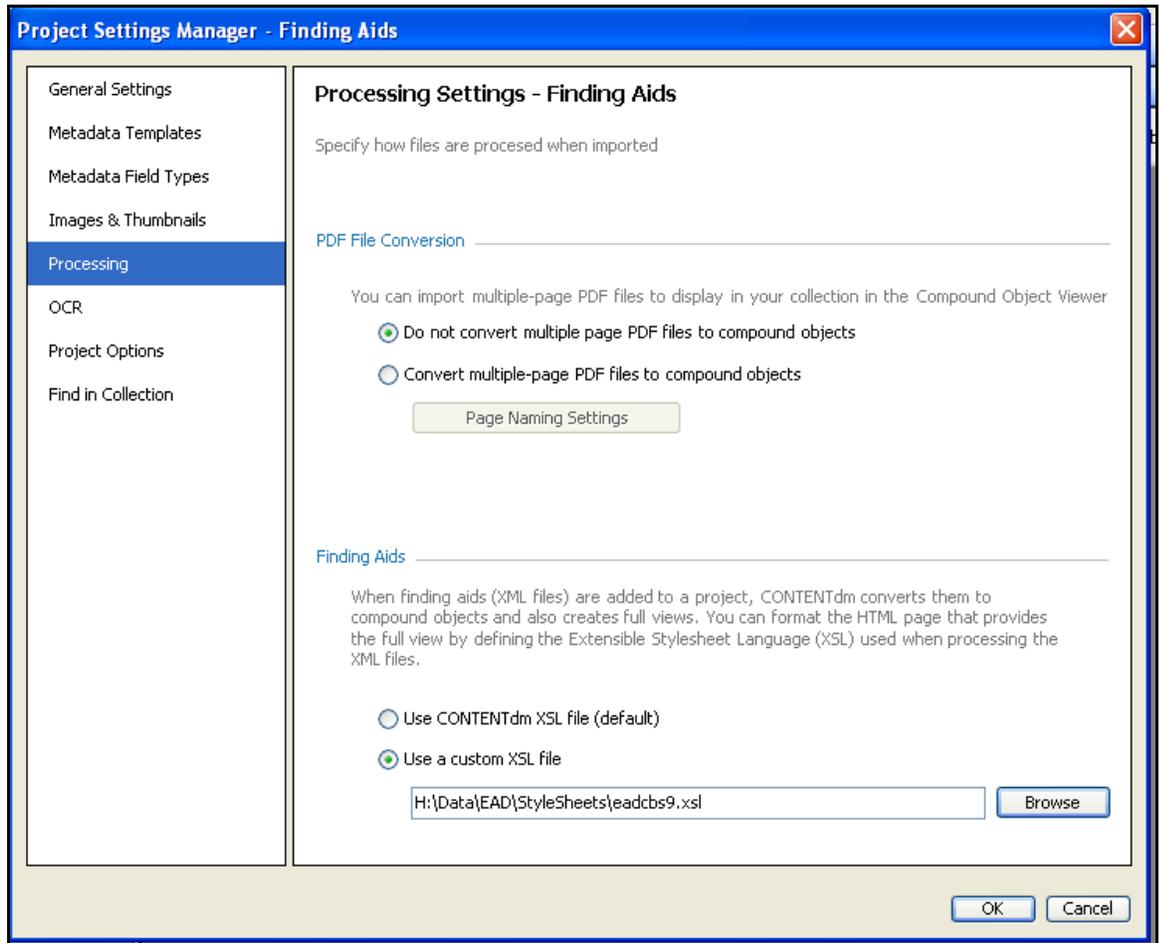
Figure 13: Custom XSL selected

4.　　Click **Next**. The Confirm Settings screen displays.

Finding Aid - Confirm Settings

Summary of settings for import.

Importing EAD file H:\Data\EAD\Guide to Curatorial Office Records of the Prints and Drawings Department, 1952-1996.xml
Use default thumbnail
Collection level description is displayed on single page
Contents list is displayed on single page
Use custom XSL file for full HTML display

[< Back]　[Finish]　[Cancel]
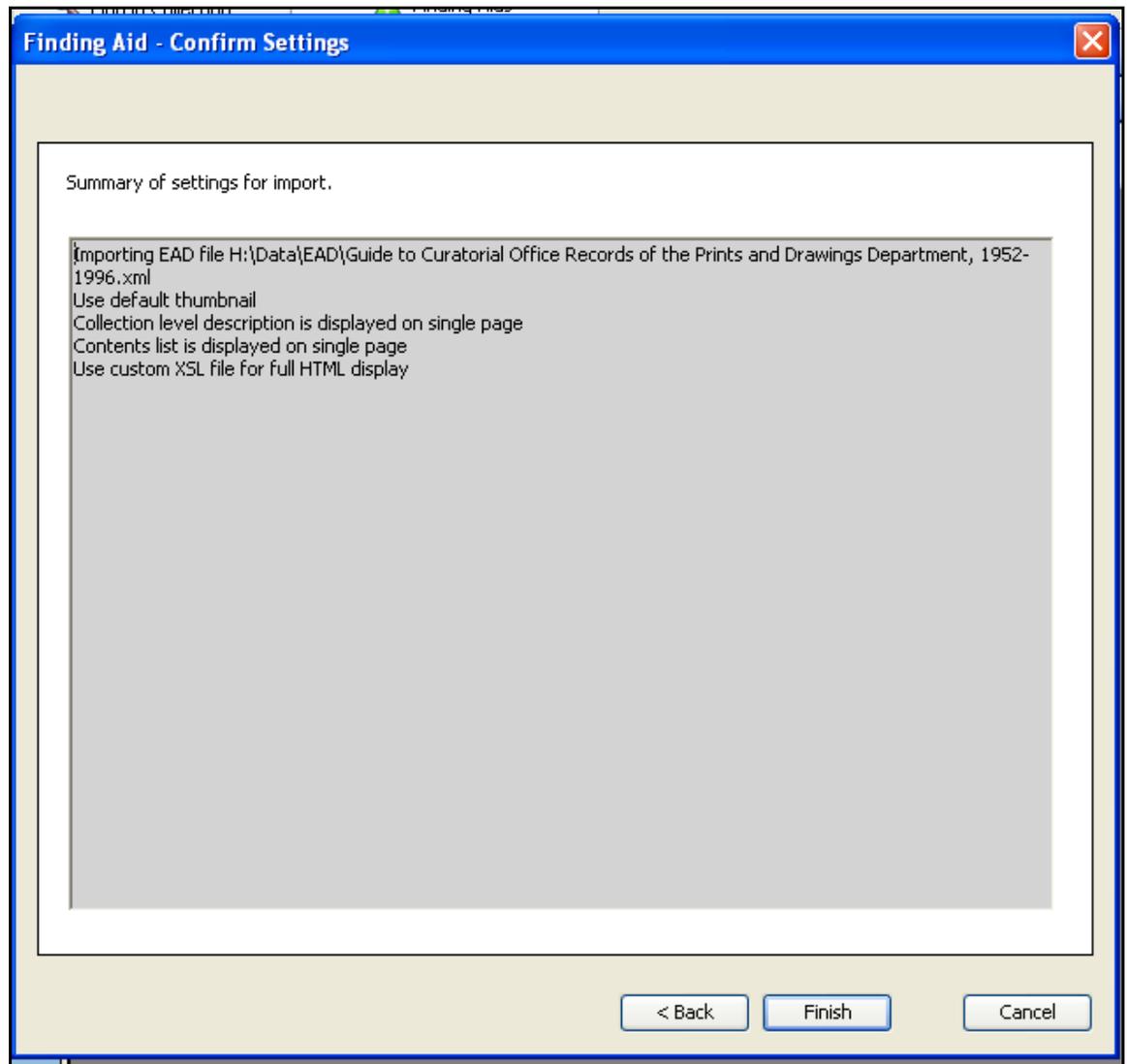
Figure 14: Confirm settings

5. Click **Finish** to complete the processing.
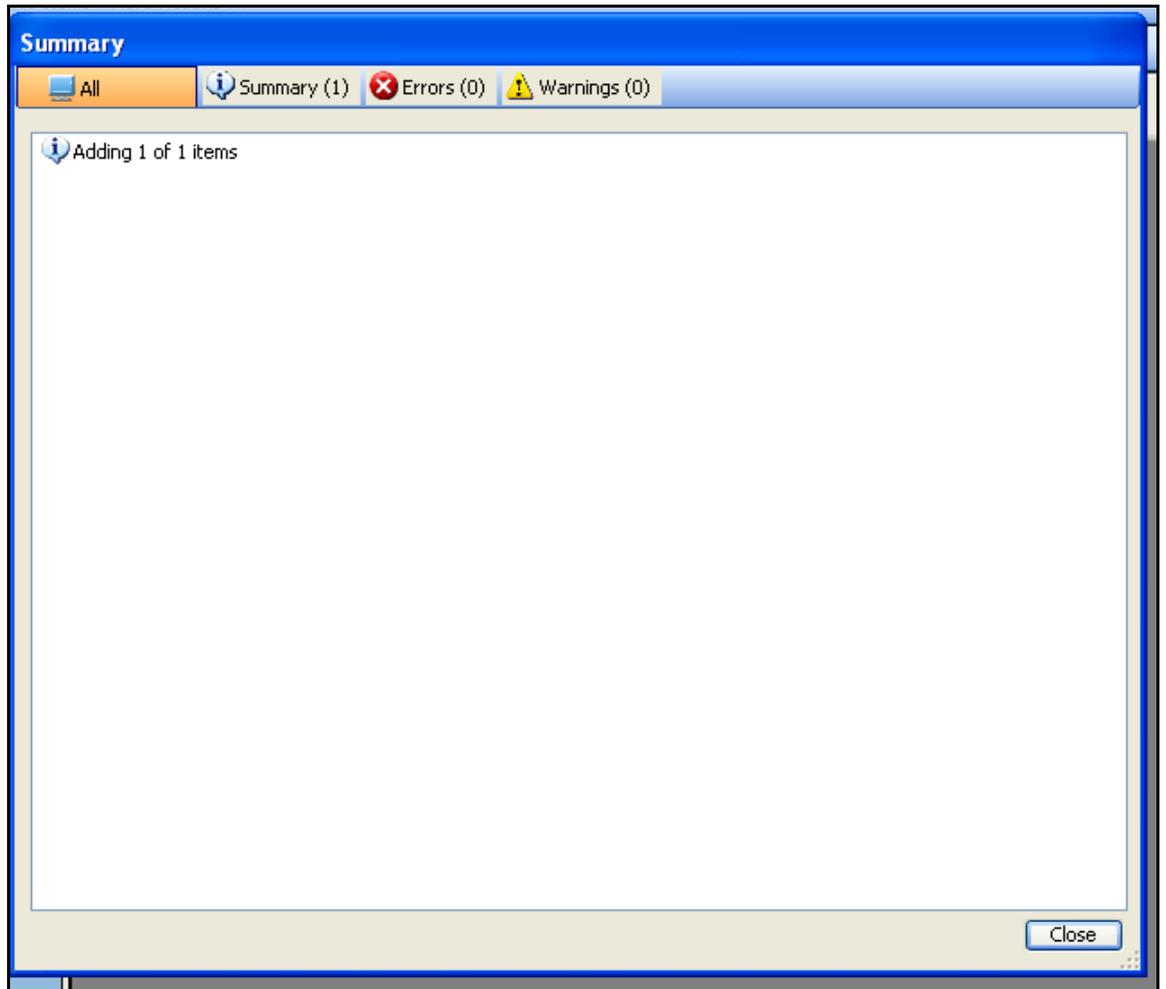
Figure 15: Summary of add finding aid

6. Click **Close** to complete the process and add the finding to the project. The finding aid displays in the Project Spreadsheet.
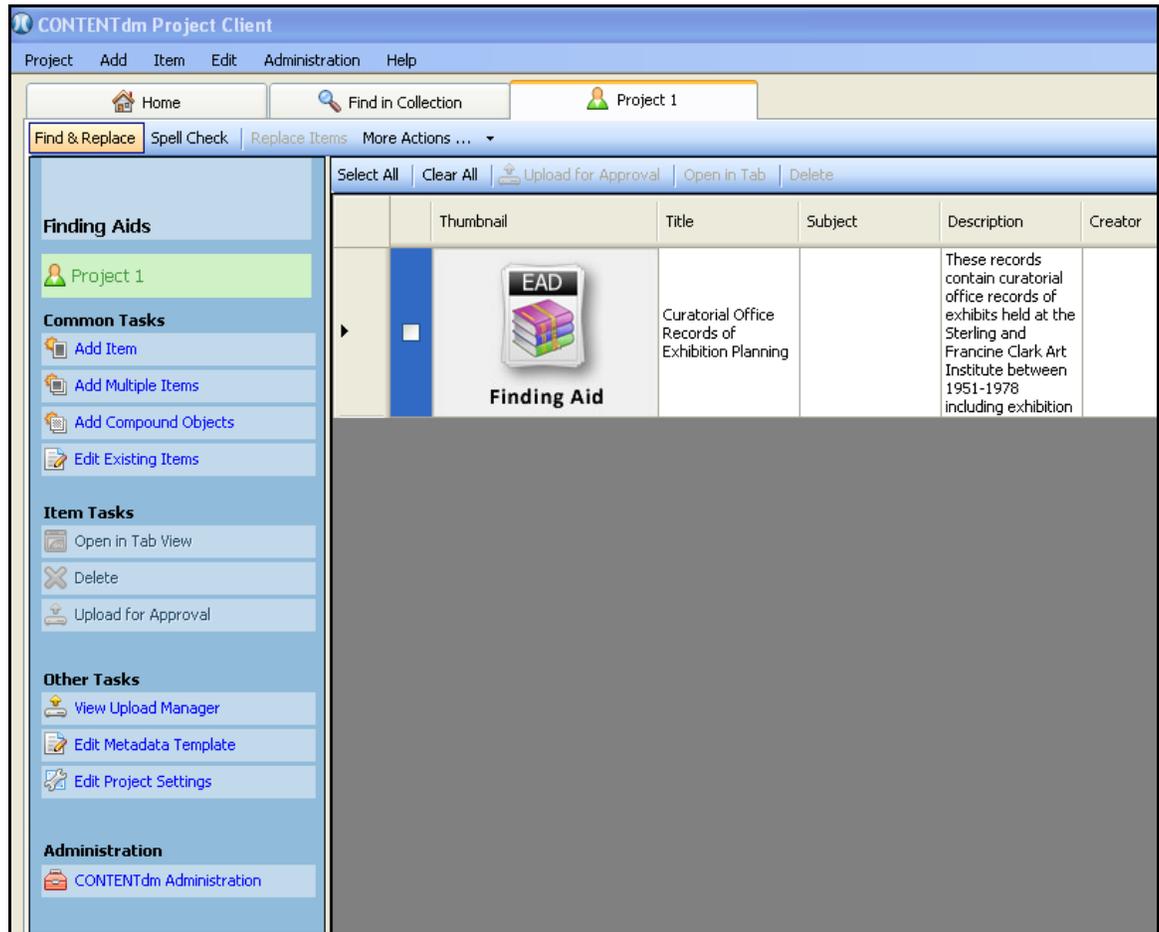
Figure 16: Finding aid added to the project

The finding aid has now been processed. You may do further metadata editing using the Project Client. Then you can upload to the server, and approve and index the collection as you would any other item in Project Client.

Note: You can edit both compound-object and page-level metadata for a finding aid.

Note: The structure of a finding aid compound object is not editable, but page names can be edited using the Project Client.

Note: For more information about editing finding aids (a kind of compound object), see **Editing Compound Objects**.

Step 6: Finding aids in the CONTENTdm end user interface

After uploading, approving and indexing, the finding aid is available to end users via your CONTENTdm end user interface. The default view of the finding aid is as a compound object. For the example finding aid, we set up processing to use a single page compound object for both the Description and Contents List pages. And we did not use a custom stylesheet for the full finding aid view.

Based on these settings, the default view of the finding aid displays as shown:

Figure 17: Compound object end user display

The Full Finding Aid view can be accessed in a new browser window by selecting **Open Finding Aid**:

Figure 18: Accessing the Full Finding Aid view

End users can view the metadata for the finding aid also by scrolling down or by clicking **View Description.**

The metadata record that is displayed was created from the metadata mapping we defined in the Add Finding Aid wizard. The **Object Description** shows the item-level metadata for the finding aid and **the Description** shows the page-level metadata for the particular page being viewed

Figure19: Viewing finding aid metadata

When searching, end users will see their search term highlighted in red in the compound object view of the finding aid.

Step 6: Editing the Default EAD Stylesheets (optional)

If the default stylesheets used to generate the compound object do not adequately display your finding aids, you can edit them to meet your needs.

To process an EAD finding aid, CONTENTdm uses three default stylesheets:

- description_default.xsl — Generates the Description section of the finding aid
- contentslist_default.xsl — Generates the Contents List section of the finding aid
- fullfindingaid_default.xsl — Generates the Full Finding Aid view

The Full Finding Aid stylesheet can be over-ridden by using the wizard, as well as by using this manual method. See **Step 5** above.

All of these files are located within the Project Client in the EAD folder (if you installed the Project Client in a folder other than ProgramFiles, you will need to locate that directory, then follow the rest of the path indicated below):

Drive or Network Location\ ProgramFiles\OCLC\CONTENTdm Project Client\EAD

To edit the Default Stylesheet files

1. Copy the default files to another location on your local system.
2. Before editing the default files, make a back-up copy of the original, unchanged default stylesheets.
3. Open the .xsl file you want to edit, and use an XML editor make your changes.
4. Save the edited files in their original location in the Project Client.

Note: the file names must retain their original names (see above) in order for processing to work correctly.

Step 7: Use the CONTENTdm <thead> alternative stylesheets (optional)

To more fully support EAD finding aids, we have provided the following alternative stylesheets that are compatible with CONTENTdm 5.1. They may be used in lieu of the default stylesheets.

These stylesheets work with EAD files that use the <thead> tag for formatting:

- **description_thead.xsl**
- **contentslist_thead.xsl**
- **fullfindingaid_thead.xsl**

To use these alternative stylesheets

1. Download the appropriate stylesheet.

2. Save the stylesheet(s) in the Project Client\EAD folder.

3. Rename the original default stylesheets located in the Project Client\EAD folder.

4. Rename the alternative stylesheets with the corresponding original default filename(s):

   description_default.xsl
   contentslist_default.xsl
   fullfindingaid_default.xsl

The next time you use the EAD wizard in Project Client, these alternative stylesheets will be used for finding aid processing.

Note: More alternative stylesheets will be made available in the future.

Step 8: Use customized stylesheets for the compound object display (optional)

You can replace the default CONTENTdm stylesheets with your own customized stylesheets. Note that CONTENTdm does not guarantee ongoing compatibility when you use your own customized stylesheets.

To replace the Default EAD Stylesheets with customized stylesheets

1. Copy and save the original default files as a back up.

   Move your replacement files into the Project Client EAD folder:

   Drive or Network Location\ ProgramFiles\OCLC\CONTENTdm Project Client\EAD

2. Name your replacement files as follows:

   description_default.xsl
   contentslist_default.xsl
   fullfindingaid_default.xsl

3. Test your stylesheets by using the Add Finding Aid wizard in the Project Client to process an EAD file.

4. Upload the finding aid to the server for approval and indexing.

5. View the finding aid in the collection to determine if the custom stylesheets are satisfactory.

To create Customized Stylesheets from the EAD Cookbook

If you are replacing the default stylesheets with EAD Cookbook stylesheets, note the following instructions detailing changes that you will need to make to the Cookbook files.

1. Using an XML editor, open the Cookbook stylesheet you want to use with CONTENTdm.

2. Edit the dsc file (dsc1.xsl - dsc15.xsl), by adding the following template above the "<!-- ....Section 1.................. -->" tag:

   ```
   <xsl:template match="/ead">
   <html>
   <head>
   <style type="text/css">
   h1, h2, h3, h4 {font-family: arial}
   td {vertical-align: top}
   </style>
   <title>
   <xsl:value-of select="eadheader/filedesc/titlestmt/titleproper"/>
   <xsl:text> </xsl:text>
   <xsl:value-of select="eadheader/filedesc/titlestmt/subtitle"/>
   </title>
   </head>
   <body>
   <xsl:apply-templates select="archdesc/dsc"/>
   </body>
   </html>
   </xsl:template>
   ```

3. Save the changes to the file(s).

4. Proceed with the instructions in the above section for replacing the default stylesheets.