Harvard EAD Guidelines

General Guidelines

- Keep punctuation together inside the tags with the word(s) it modifies... i.e. treat it as character information that belongs with the text, not as separate white space. Punctuation, meaning the symbols such as commas, periods, quotation marks, brackets, etc. and NOT meaning whitespace (tabs and blanks and carriage returns), will be normalized out of the indices so that users won't have to know the punctuation to retrieve documents.

- In general, do not use rendition attributes (<emph>, <lb>, etc.). Rely on the style sheet instead.

- The default style for the <title> tag is italic. If you want the text in quotes, use <title render="doublequote">. If you do not want it to display in italic, use <title altrender="normal">.

- Use a <head> element for information that helps the reader with navigation, or provides useful information, but should not be indexed, such as labels or folder summaries. For information that is there for retrieval purposes (i.e. should be indexed) use a title element such as the <unittitle> defined in the <c> element.

- The style sheet automatically display the default text "Series" for <c>s with level="series. Setting the altrender attribute to "normal" (as in, <c level="series" altrender="normal"> will NOT suppress the display.

- If you want dates to index correctly they must be in the four digit format, e.g. 1860-1865.

- If you use the "normal" attribute in a <unitdate> or <date>, you will need to use the date and date range subset of ISO 8601"Representation of Dates and Times."

- Please note that optional elements as presented in this template are not in a prescribed order and may be ordered at the repository's discretion.

Tagging Guide

<?xml version="1.0"?> **[REQUIRED]**
<ead xmlns:xlink="http://www.w3.org/1999/xlink"> **[REQUIRED]**

<eadheader> **[REQUIRED]**
"langencoding": Language encoding for EAD instances subscribes to ISO 639-2b, "Codes for the Representation of Names of Languages." This attribute is automatically associated with the <eadheader> element when your finding aid is ingested into the OASIS system.

<eadid identifier="HOLLISNUMBER">xxxnnnnn</eadid> **[REQUIRED]**
> *This is the unique eight-character ID for the finding aid. "xxx" is a three letter location code, such as "sch" for Schlesinger Library or "hou" for Houghton. The identifier employed must be the Hollis number associated with the collection.*

<filedesc><titlestmt><titleproper>title</titleproper></titlestmt></filedesc> **[REQUIRED]**
> *The title of the collection should be in format: Creator. Title of Collection, Dates: Finding Aid. This is the official name of your finding aid. The title of the collection should match what you put in the "titleproper" tag in the "frontmatter" section. (See below.)*

<profiledesc> <creation><date>yyyy-mm-dd</date>encoder's name</creation>
</profiledesc> **[REQUIRED]**
> *This is the date the encoded finding aid was created. (Providing the name of the encoder is optional.)`*

<revisiondesc><change><date>yyyy-mm-dd </date><item><name>encoder's name</name>reason for update</item></change></revisiondesc> **[OPTIONAL]**

> *This is the date the encoded finding aid was substantially revised. Providing the date the finding aid was revised is required; providing the name of the encoder and the reasons for why it was updated are optional.)*

</eadheader>

<frontmatter> **[REQUIRED]**
<titlepage> **[REQUIRED]**

<num>collection number or record group and series number or other number</num> **[REQUIRED]**
> *Collection number or record group and series number or other number.*

<titleproper>title of the collection</titleproper> **[REQUIRED]**

> *Title of the collection in format: Creator. Title of Collection, Dates: Finding Aid. This consists of the 1XX field of the corresponding HOLLIS record in sort order (for example: Last name, First name), followed by the exact wording from the 245 field and dates (dates are optional for both the 1XX and 245 fields). After the 245 field, type a colon and state type of descriptive material (for example: register, contents list, guide, inventory, or finding aid).*

> *The title of the collection should match what you have in the "titleproper" tag in the "filedesc" section. Examples:*
> > *1. When the creators name appears in the title: Gladding, Anna Spicer. Papers of Anna Spicer Gladding and Miriam Van Waters: An Inventory*
> > *2. When the creator's name doesn't appear in the title: James, William. Papers, 1803-1941: A Guide*
> > *3. When there is no creator: Trade cards, 1870-1900 (bulk): An Inventory*

<author>name of repository</author> **[REQUIRED]**

<publicationstmt><publisher>name of library or parent organization</publisher><address>publisher's address<address></publicationstmt> **[Publisher name REQUIRED, address is OPTIONAL]**

<p><extptr xlink:type="simple" xlink:href="http://nrs.harvard.edu/urn-3:HUL.OIS:fas_shield"></p> **[OPTIONAL]**
> *To insert shield or logo.*

<date>dd Month yyyy</date> **[OPTIONAL]**
> *Publication date.*

<p>© yyyy The President and Fellows of Harvard College</p> **[REQUIRED]**
> *Copyright statement.*

<edition>Last update dd Month yyy</edition>**[OPTIONAL]**

<sponsor>name of sponsor</sponsor> **[OPTIONAL]**
> *Name or person or organization sponsoring the processing and/or description of the collection.*

</titlepage>
</frontmatter>

<archdesc level="collection"> **[REQUIRED]**
> *Insert appropriate attribute level (usually "collection").*

<did> **[REQUIRED]**

<repository><extref xlink:href="https://yourrepositorylink.html"><corpname><subarea>name of library or archives</subarea>name of parent institution</corpname></extref></repository> [**REQUIRED**]
> *Provide link to repository. <subarea>is not required, if not applicable.*

<unitid countrycode="US" repositorycode="xxx-x"></unitid> [**OPTIONAL**]
> *"countrycode" is a unique code to indicate the country in which the materials being described are held. Codes are constrained to ISO 3166-1 code list "Codes for the Representation of Names of Countries, column A2. This attribute is available in the <eadid> and <unitid> elements.*
>
> *"repositorycode" is a unique code that you can put in a <unitid> indicating the repository responsible for intellectual control of the materials being described. The value for this attribute is now constrained to ISO 15511 (ISIL) "Codes for the Representation of Names of Countries and their Subdivisions."*
>
> *"mainagencycode" is a code that you can use as an attribute in any <eadid>; the value for this attribute is now constrained to ISO 15511, "Information and Documentation International Standard Identifier for Libraries and Related organizations (ISIL). Values should be supplied without the country code, which should be placed instead in the "countrycode" attribute.*

<physloc>shelving designation</physloc> [**OPTIONAL**]

<origination>creator(s)</origination> [**OPTIONAL**]
> *Creators of the collection, with or without dates. Tag can be used multiple times to indicate more than one creator.*

<unittitle>title of collection, series, etc.</unittitle> [**REQUIRED**]

<unitdate type="inclusive" normal="1234/1234">yyyy-yyyy (inclusive),</unitdate> [**OPTIONAL, normal attribute not required**]

<unitdate type="bulk" normal="1234/1234">yyyy-yyyy </unitdate>(bulk). [**OPTIONAL, normal attribute not required**]

<physdesc><extent>extent</extent></physdesc> [**OPTIONAL**]
> *Information about the size of a collection. Example: 8 cubic feet (7 records storage cartons and 1 legal document box). Optionally, you could use <num> to indicate a call number for a microfilm reel or other version.*

brief description of the contents of the collection [**OPTIONAL**]
> *"langcode" is the three-letter code for the language in which an abstract is written; it is an attribute for an . The attribute is also used to indicate the language of the finding aid and the language of the materials, and is associated with the <language> element. The codes are constrained to ISO 639-2b, "Codes for the Representation of Names of Languages."*
>
> *"scriptcode" is available as an attribute of the <language> element. It consists of a three letter code for the writing script used with a given language. The code is constrained to the ISO 15924 code list "Code for the Representation of Names of Scripts."*

<langmaterial>Collection materials are in <language langcode="eng">English.</language></langmaterial> [**OPTIONAL**]
> *Use to indicate the language of the materials being described, not the language employed to author the finding aid. <language langcode=""> can be used multiple times to indicate more than one language. Language codes, such as "eng" are constrained to ISO 639-2b, "Codes for the Representation of Names of Languages."*

</did>

<acqinfo> [**OPTIONAL**]
<p><num>accession number</num></p> [**OPTIONAL**]
<p><persname role="donor">personal name - immediate source of acquisition</persname></p> *OR*
<p><corpname role="donor">corporate name - immediate source of acquisition</corpname></p> *OR*
<p><famname role="donor">family name - immediate source of acquisition</famname></p> [**OPTIONAL**]
<p><date>dd Month yyyy</date></p> [**OPTIONAL**]
</acqinfo>

<custodhist><p>custodial history</p></custodhist> [**OPTIONAL**]

<processinfo><head>Processed by:</head><p><persname role="processor">name of
        processor</persname></p> **[OPTIONAL]**
<p><date>dd Month yyyy</date></p> **[OPTIONAL]**
<p>additional processing information</p></processinfo> **[OPTIONAL]**

<accessrestrict><p>access restrictions</p></accessrestrict> **[REQUIRED]**

<userestrict><p>use restrictions</p></userestrict> [**REQUIRED**]

<prefercite><head>Preferred Citation:</head><p>preferred citation statement</p></prefercite> **[OPTIONAL]**

<relatedmaterial><head>Related Material:</head><p>related material information</p></relatedmaterial>
[OPTIONAL]

<separatedmaterial><head>Separated Material:</head><p>separated material information</p></separatedmaterial>
[OPTIONAL]

<arrangement> **[OPTIONAL]**
<head>heading for arrangement section</head> **[OPTIONAL]**
Example: Series and Subseries in the Collection
        <list> **[OPTIONAL]**
        To create an outline of series and subseries with links to related sections in the finding aid, you may use
        <ref target> and include an ID in <c level>. Please see internal linking document.
        <list><item>1. Series </item>
        <list><item>A. Subseries</item></list>
        <item>2. Series</item>
        <item>3. Series</item></list>
</arrangement>

<bioghist> **[OPTIONAL]**
<head>Biographical Notes *OR* Historical Notes</head> **[OPTIONAL]**
    Pick one.
<p>text for biographical note or history of an organization, company, etc.</p> **[OPTIONAL]**
<chronlist> **[OPTIONAL]**
<head>heading for chronology</head> **[OPTIONAL]**
<chronitem><date>date</date><event>event</event></chronitem> **[OPTIONAL]**
</chronlist>
    In date - event format.
</bioghist>

<scopecontent> **[OPTIONAL]**
<head>Scope and Content</head> **[OPTIONAL]**
<p>scope and content note for collection</p></scopecontent> **[OPTIONAL]**

<controlaccess> **[OPTIONAL]**
Note: All <controlaccess> terms are under authority control.
<head>heading for control access list/terms</head> **[OPTIONAL]**
<list><item><persname>personal name</persname></item> **[OPTIONAL, repeatable]**
<item><corpname>corporate name</corpname></item> **[OPTIONAL, repeatable]**
<item><subject>subject</subject></item> **[OPTIONAL, repeatable]**
<item><geogname>geographic heading</geogname></item> **[OPTIONAL, repeatable]**
<item><genreform>genre term</genreform></item> **[OPTIONAL, repeatable]**
<item><occupation>occupation</occupation></item></list> **[OPTIONAL, repeatable]**
</controlaccess>

<dsc type="in-depth"> **[REQUIRED]**
<head>heading for collection-level info</head> **[OPTIONAL]**
> *Level is optional. The default assumption is that level=item, and that "items" are whatever is the lowest*
> *level of description that you have chosen to do.*

Option 1: Basic
<c level="series">
<did><head>heading for series or other descriptive level</head></did>
Option 2: Enhanced
<c level="series"
<did>
<unittitle>Series I, <unitdate normal="1234/1234">yyyy-yyyy.</unitdate></unittitle>
<physdesc><extent>[x] cubic feet in [x] records storage cartons, [x] document boxes, [x] oversized boxes, etc.
</extent></physdesc>
</did>
<note><acqinfo><p>acquisitions information particular to this series only.</p></acqinfo>
<custodhist><p>custodial history particular to this series only.</p></custodhist>
<accessrestrict><p>access restrictions particular to this series only.</p></accessrestrict>
<userestrict><p>user restrictions a researcher should know about that are particular to this series
only.</p></userestrict>
<bioghist><p>summarize the history of the event, problem, subagency, project, activity, etc. the series' existence is
attributable to. Provide historical information pertaining to this series only.</p></bioghist>
<scopecontent><p>scope note specific to this series only. </p></scopecontent>
<arrangement><p>indicate a filing order such as chronological or alphabetical that applies to this series
only.</p></arrangement>

> **Option 1: Basic**
> <c level="subseries">
> <did><head>heading for series or other descriptive level</head></did>
> </c>
> **Option 2: Enhanced**
> <c level="subseries">
> <did>
> <unittitle>A. Title of Subseries, <unitdate>yyyy-yyyy. </unitdate></unittitle>
> <physdesc><extent>[x] cubic feet in [x] records storage cartons, [x] document boxes, [x] oversized boxes,
> etc.</extent></physdesc>
> </did>
> <accessrestrict><p>access restrictions particular to this subseries only.</p></accessrestrict>
> <scopecontent><p>specific to this subseries only.</p></scopecontent>
> <arrangement><p>indicate a filing order such as chronological or alphabetical that applies to this subseries
> only.</p></arrangement>
> </c>

> > **Option 1: Basic**
> > <c level="subseries">
> > <did>
> > <head>heading for sub-subseries or other descriptive level</head></did>
> > </c>
> > **Option 2: Enhanced**
> > <c level="subseries">
> > <did>
> > <unittitle>1. Title of Sub-Subseries, <unitdate>yyyy-yyyy. </unitdate></unittitle>
> > <physdesc><extent>[x] cubic feet in [x] records storage cartons, [x] document boxes, [x]
> > oversized boxes, etc.</extent></physdesc>
> > </did>
> > <accessrestrict><p>access restrictions particular to this sub-subseries only.</p></accessrestrict>
> > <scopecontent><p>specific to this sub-subseries only. </p></scopecontent>

<arrangement><p>indicate a filing order such as chronological or alphabetical that applies to this sub-subseries only.</p></arrangement>
</c>

Option 1: Repeated container elements
<c level="item"><did><unittitle>Procedure for dances, <unitdate>1953-1971 </unitdate></unittitle><container>Box 10</container></did></c>
<c level="item"><did><unittitle>Notices and announcements, <unitdate> 1953-1971 </unitdate></unittitle><container>Box 10</container> </did></c>
Option 2: A single element for each container
<c level="otherlevel"><did><container>Box 10</container> </did></c>
<c level="item"><did><unitid>01</unitid><unittitle>Procedure for dances, <unitdate> 1953-1971 </unitdate></unittitle></did></c>
<c level="item"><did><unitid>02</unitid><unittitle>Notices and announcements, <unitdate> 1953-1971 </unitdate></unittitle></did></c>

Note: <unitdate> can be placed inside the <unittitle> if appropriate, and will display inline with the title. For other kinds of dates, use the <date> element inside the <unittitle> or other <c>-level subelement.

</c>

You may use <index>; please see the [Creating an Index document](#) for more information.

</dsc>
</archdesc>
</ead>