



# Arizona Archive Online

Guidelines to EAD Best Practices (version 3.1)

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**Best Practices Working Group**

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## Arizona Archives Online (AAO) Best Practices

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## EAD Guideline Tables

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## Purpose of Best Practices

- Ensure basic uniformity when encoding and submitting AAO finding aids
- Promote efficient uploading procedures to AAO web site
- Revise and realign best practices with other EAD consortium efforts
- Enhance access to archival descriptions for end users

## Encoding schemes

[Arizona Archives Online](#) (AAO) contains descriptions for much of the archival materials held by member repositories within the state of Arizona—from single items and small collections to complex, multilevel collections. Given this fact and that repositories work with different collecting focuses and operating constraints, it is impractical and inefficient to describe the entire range of archival materials to the same degree. Some similar types of materials that comprise the entirety of a collection, such as the minutes of a single committee or diaries of an individual, can be described at the collection level (i.e. a container list <dsc> section may not be necessary). Other collections comprised of multiple homogeneous series, such as the outgoing correspondence of an administrator or minutes of a committee, can be described at the series or subseries level. Consequently, not all archival description needs to contain in-depth information to the folder or item level.

### Encoding Levels

#### *Basic*

The basic scheme is used for guides that reflect a single level or nonhierarchical descriptive output. It can be used for homogenous archival materials described at any level, including collections, record groups, fonds, record series, or subseries. The basic scheme can also be used for small or single-item collections or “**hidden collections**” not yet fully processed or not expected to be processed for some time. (See discussion on “Hidden Collections” below).

Examples of collection where a Basic encoding level may be implemented:

- Small collections, including single-item collections
- Large homogeneous collections (e.g., the minutes of a committee, diaries of an individual)
- Collections not yet fully processed or not expected to be processed for some time.

Although repositories are generally encouraged to describe materials as completely as possible, these collections may not warrant component descriptions or a detailed listing of files or items <dsc> (i.e. container listings). In the case of “Hidden Collections”, detailed descriptions to the file and item level may not be available.

### *Full*

The full encoding level should be used for multilevel or hierarchical descriptive output. The <archdesc> description of archival materials can begin at any level, but most often multilevel description begins at the “collection” or general level to “series” “subseries” “file” (more specific) level.

Most fully-processed collections will use the <dsc> section to provide a detailed listing of archival materials at the “series” level and, subsequently, the “file” level. Some archival descriptions may provide description to the “item” level, but often the “file” level will suffice. This encoding scheme does not require that each subdivision in the collection be described to the file or item level, but all repositories are strongly encouraged to describe archival materials as completely as possible.

Examples of collections where a Full encoding level may be implemented:

- Records of a business, association, or organization
- Papers of a politician, civic leader, or family
- Record series of a political office or governmental agency

## Minimum Required Elements for Core AAO Finding Aid

Below is an example of the elements that have the status **Req** in the AAO Best Practice Guidelines.

This Core AAO Finding Aid provides for a basic level of description. This example is appropriate for in cases involving small collections or single items, larger homogenous collections, and hidden or unprocessed collections that will not be fully processed for some time. Other elements may be added where appropriate to provide additional information regarding the described materials.

For more on submitting Hidden or unprocessed collections to the AAO web site (see [Hidden Collections](#) section).

<ead>

<eadheader>

<eadid>

<filedesc>

<titlestmt>

<titleproper>

<date>

<titleproper> [Filing Title]

<publicationstmt>

<publisher>

<address>

<addressline>

<date>

<profiledesc>

<langusage>

<language>

<frontmatter>

<titlepage>

<titleproper>

```
<date>
<num>
<publisher>

<archdesc>
  <did>
    <unitid>
    <unittitle>
    <unitdate>
    <physdesc>
      <extent>
    <abstract>
    <langmaterial>
      <language>
    <repository>
      <corpname>
  </did>
  <scopecontent>
  <accessrestrict>
```

## Hidden Collections

In an effort to provide and alert end users of all primary resources held by Arizona repositories, member institutions are developing standards for encoding unprocessed collections. Finding aids for unprocessed collections convey basic descriptive and administrative information to users to promote resource discovery, explain terms of access, and contact information for users to request access to these archival materials. The Description of Subordinate Components or container list <dsc> element is not required when describing an unprocessed collection. If creating a <dsc> with the finding aid, encoding the LEVEL attribute to "analyticover" and supply summaries of subdivisions of an unprocessed collection.

Basic <archdesc> elements to be used when creating finding aids for a Hidden Collection include: <unitid>, <unittitle>, <unitdate>, <physdesc>, <abstract>, <repository>, <langmaterial>, <scopecontent>, and <accessrestrict>. In addition, nested elements for these elements should be used.

## Encoding Hierarchical vs. Flat Arrangement within the <dsc> element

Within the Description of Subordinate Components or container list <dsc> element, EAD uses a system of numbered <c0x> component tags to capture the organization and description of a collection. There is no fixed correspondence between a component tag and the intellectual level -- a component tag is merely a wrapper used to encode nested, hierarchical arranged descriptions. There can be variance between a <c02> element within the same guide (i.e. it may serve to encode a file in one section of a container list and an item in another section). When providing a hierarchical description, use the <c01> down to the necessary <c0x> component to describe each unit. Always used numbered component elements. The LEVEL attribute with an allowable value is required to distinguish each unit. The LEVEL value must be one of the following: class, collection, file, fonds, item, otherlevel, recordgrp, series, subfonds, subgrp, subseries. The use of these encoding guidelines will facilitate indexing, style sheet rendering, and display of the finding aid data.

If a collection has a "flat" arrangement, use <c01> tags to describe each unit. The LEVEL attribute with an allowable value is required to distinguish each unit. The LEVEL value must be one of the following: class, collection, file, fonds, item, otherlevel, recordgrp, series, subfonds, subgrp, subseries.

### Hierarchical arrangement

```
<c01 level="series">
  <did>
    <unitid>Series I</unitid>
    <unittitle>Re-election Records</unittitle>
    <unitdate>2008</unitdate>
  </did>
  <c02 level="subseries">
    <did>
      <unittitle>Donor Correspondence</unittitle>
      <unitdate>October 2008</unitdate>
```



```

    </did>
    <c03 level="file">
      <did>
        <container type="Box">1</container><container type="folder">1</container>
        <unittitle>Ohio donors</unittitle>
      </did>
    </c03>
    <c03 level="file">
      <did>
        <container type="Box">1</container><container type="folder">2</container>
        <unittitle>Oklahoma donors</unittitle>
      </did>
    </c03>
    <c03 level="file">
      <did>
        <container type="Box">1</container><container type="folder">3</container>
        <unittitle>Oregon donors</unittitle>
      </did>
    </c03>
  </c02>
</c01>

```

### Flat arrangement

```

<c01 level="file">
  <did>
    <container type="folder">1</container>
    <unitid>NAU.ARC.1996.5.1</unitid>
    <unittitle>Spring Football Camp</unittitle>
    <unitdate>1996</unitdate>
  </did>
</c01>
<c01 level="file">
  <did>

```

```

    <container type="folder">2</container>
    <unitid>NAU.ARC.1997.5.1</unitid>
    <unittitle>Spring Football Camp</unittitle>
    <unitdate>1997</unitdate>
  </did>
</c01>
<c01 level="file">
  <did>
    <container type="folder">3</container>
    <unitid>NAU.ARC.1999.5.1</unitid>
    <unittitle>Spring Football Camp</unittitle>
    <unitdate>1999</unitdate>
  </did>
</c01>

```

## Describing Archives: a Content Standard (DACS)

In order to promote interpretability within the AAO database of finding aids and beyond, AAO institutions are highly encouraged to observe the guidelines for describing archival materials regardless of format as provided for in [Describing Archives: a Content Standard](#), particularly when supplying archival description above the <dsc> section. The standard provides guidance on describing the content and context of archival materials, as well as instruction on describing creators and forming names (controlled vocabulary).

## Order of elements

The AAO Best Practice Guidelines present EAD elements in a preferred sequence. It is not required that repositories follow this sequence, it is encouraged that they follow the order in which the elements are listed in the tables to enhance the review and formatting of finding aids. The grouping, rendering and public display of the elements within a finding aid will be controlled by the AAO style sheet.

## Nesting and Repeating elements

EAD elements may be nested as allowed by the [EAD Tag Library](#) (see the “May contain” section of each element description). The repeatability of each element (i.e., more than one occurrence of an element may be used) is also stated in the *Status* column of the detailed element tables.

When the <p> (paragraph) element is allowed within another element, it may be repeated as often as necessary (e.g. <bioghist>, <scopecontent>, <accessrestrict>, <userrestrict>, <prefercite>, <relatedmaterial>, <arrangement>, etc.).

## Filing Titles

In order to insure that collection titles can be sorted and displayed alphabetically from the AAO web site, repositories are required to adopt the encoding practice of utilizing a second occurrence of the <titleproper> element in the EAD header to hold the filing title. See the <eadheader> Table (table 1) under <titleproper> for details and examples of using the second <titleproper> [filing title] element. The <titleproper> used for filing title has been inserted into each repository’s template.

Examples of filing title <titleproper> element:

- Personal name (invert last name and enclose first name in parenthesis):

- ❖ <titleproper type="filing" altrender="nodisplay">Udall (Morris K. and Stewart) Papers</titleproper>

- Family name (direct heading):

- ❖ <titleproper type="filing" altrender="nodisplay">Day Family Diaries</titleproper>

- Business, organization, or association name (direct heading):

❖ `<titleproper type="filing" altrender="nodisplay">Blue Moon Publishing Company Records</titleproper>`

## Entering dates

All `<unitdate>` Date elements *above* the `<dsc>` Description of Subordinate Components element must contain a NORMAL attribute for encoding normalized dates. For those `<unitdate>` elements above the `<dsc>` Description of Subordinate Components element, but within the `<archdesc>` element, use the four-digit year format ("YYYY") only.

The `<date>` element found within the `<eadheader>` element (i.e. `<filedesc>`, `<publicationstmt>`, `<profiledesc>`, `<revisiondesc>`, and `<frontmatter>`) can be normalized according to the [International Standard Organization \(ISO\) 8601](#) standard to the year, month and day. Designating the time of day is not necessary and should not be included.

*Example of encoded date(s):*

**Inclusive and Bulk dates – use TYPE attribute to distinguish between "inclusive" and "bulk" dates**

```
<unitdate type="inclusive" normal="1992">1992</unitdate>
```

```
<unitdate type="inclusive" normal="1980/1983">1980-1983</unitdate>
```

```
<unitdate type="bulk" normal="1970/1985">(bulk 1970-1985)</unitdate>
```

**Broken dates (e.g., "1900, 1905-1918") – use separate `</unitdate>` elements**

```
<unitdate type="inclusive" normal="1900">1900,</unitdate><unitdate type="inclusive" normal="1905/1918">1905-1918</unitdate>
```

**Open date spans – set NORMAL attribute to 9999 for [ongoing]**

```
<unitdate normal="1962/9999">1962-[ongoing]</unitdate>
```

### Approximate dates – use appropriate date span in the NORMAL attribute

```
<unitdate normal="1915/1925">ca. 1920</unitdate>  
<unitdate normal="1920/1929">1920s</unitdate>  
<unitdate normal="1901/2000">20th century</unitdate>
```

### Undated material – use approximate dates based on the earliest and latest dates the material were created

```
<unitdate normal="1888/1931">undated</unitdate>
```

### Heading <head> elements (i.e. labels)

Except within the <bioghist> element, the <head> element should not be utilized by AAO repositories. The finding aid's headers or section titles will be controlled by the AAO style sheet and NOT by the information encoded within the <head> element.

AAO repositories should select the appropriate <head> element within the <bioghist> based on whether the creator of the collection is an individual/family, business/association or governmental agency:

- <head>Biographical note</head>
- <head>Historical note</head>
- <head>Administrative history</head>

### Special character encoding

For all **special characters encoded in XML**, encode directly in UTF-8 Unicode, or use **Unicode decimal or hexadecimal character references**. Note that all decimal character references should begin with an ampersand (&) and/or pound sign (#), and end with a semicolon (;). More commonly used characters found in EAD finding aids including the following:

&	&amp;#x26;	(Ampersand)
<	&lt;	(Left angle bracket)
>	&gt;	(Right angle bracket)
©	&copy;	(Copy right symbol)

## Punctuation and Empty elements

*EAD markup should not generally include punctuation between the <unittitle> and <unitdate> elements.* The style sheet will add punctuation in those cases. Punctuation is acceptable within any other given element.

After completing the EAD markup process, but before loading finding aids to the AAO web site -- empty elements (i.e. tags containing no data) should be removed.

## Special formatting of text: <emph> and <title> elements and the use of the RENDER attribute

Bold, underline, italic, and other similar kinds of formatting should be represented using the EAD <emph> tag or the <title> tag with RENDER attribute set accordingly.

- <emph> for formatting a segment of text within a larger body of text.

EAD Markup:

```
<emph render="bold">Northern Arizona University</emph> defeated the University of Arizona in football.
```

Public Display:

**Northern Arizona University** defeated the University of Arizona in football.

- **<title>** for formatting the title of a book, journal, newspaper

EAD Markup:

```
The photographs were published in the Fall 2011 edition of <title
render="italic">Arizona Highways</title>.
```

Public Display:

The photographs were published in the Fall 2011 edition of *Arizona Highways*.

### Special formatting of text: **<list>** and **<item>** elements

Lists should be represented using the EAD **<list>** tag with nested **<item>** tags for each entry in the list. Lists can be inserted into elements contained within the **<archdesc>** (content, context, and extent of the entire body of the archival material) and **<dsc>** (detailed listing of files). Set the **<list>** TYPE attribute to select the type of list desired (i.e. "simple", "deflist", "marked", "ordered").

EAD Markup:

```
<arrangement>
<p>Collection consists of four series:
<list type="simple">
<item>I. Correspondence</item>
<item>II. Minutes</item>
<item>III. Reports</item>
<item>IV. Bank statements</item>
</list></p></arrangement>
```

Public Display (style sheet rendered):

**Arrangement and organization**

Collection consists of four series:

- I. Correspondence
- II. Minutes
- III. Reports
- IV. Bank statements

## Linking to digital objects and external content

Table Four provides guidelines for external linking to digital resources or associated digital objects that are and are not part of the materials being described by the finding aid.

Linking to Digital Objects from the finding aid

Use the `<daogrp>` Digital Archival Object Group element, with its child elements `<resource>` Resource, `<daoloc>` Digital Archival Object Location, and `<arc>` ARC, for references/links to digital representations of collection items described in the finding aid. The `<dao>` element allows for only one digital object, while `<daogrp>` allows for one or more digital objects to be nested. In order to maintain consistency, AAO recommends that institutions use the `<daogrp>` element approach to linking to one or more digital objects within a finding aid. The `<daogrp>` element should be nested with the following subelements: `<daodesc>`, `<resource>`, `<daoloc>`, and `<arc>`.

The `<daogrp>` elements may be included in the following EAD elements: `<archdesc>`, `<archdescgrp>`, `<archref>`, `<bioghist>`, any `<c0x>` component group, `<did>`, and `<scopecontent>`.

Example of linking digital object to finding aid:

```
<c02 level="file">
  <did>
    <unittitle>Photographs of Bruce Babbitt and family members</unittitle>
    <unitdate>1967-2004</unitdate>
```



```

<daogrp linktype="extended">
  <daodesc>
    <p>Sample digitized image from this file: Bruce Babbitt portrait,
      28 May 1988.</p>
  </daodesc>
  <resource linktype="resource" label="start"/>
  <daoloc entityref="babbitt_1tmb" linktype="locator" label="thumb"/>
  <daoloc entityref="babbitt_1ref" linktype="locator" label="reference"/>
  <arc linktype="arc" show="embed" actuate="onload" from="start" to="thumb"/>
  <arc linktype="arc" show="new" actuate="onrequest" from="thumb"
    to="reference"/>
</daogrp>
</did>
</c02>

```

External linking (pointers and reference tags)

All external linking should be encoded using the [<extptr>](#) Extended Pointer or the [<extref>](#) Extended Reference tags with the HREF attribute. While the [<archref>](#) and [<bibref>](#) elements found in the EAD.DTD do allow external linking, it is recommended the members use the [<extptr>](#) Extended Pointer or the [<extref>](#) Extended Reference tags with the HREF attributes instead.

The [<extptr>](#) element is an empty external linking tag, but the [<extref>](#) element can include text and subelements as part of its reference to an electronic object external to the finding aid. AAO repositories are strongly encouraged to use the HREF attribute. The use of the ENTITYREF attribute with an associated entity declaration at the top of the finding aid markup for establishing a destination for the link, such as a URL is not recommended.

For external linking elements, the AAO stylesheet default behavior will be to render links as SHOW="replace" (i.e., the linked resource will be displayed in the same browser window). The stylesheet will support SHOW="embed" for images only (i.e., the image will be displayed inline in the finding aid) and SHOW="new" (i.e., the linked resource will be displayed in a new browser window). Use of any other SHOW attribute will be rendered as the default SHOW="replace".

Example of [<extptr>](#) element as an empty external linking tag to a digital object:

```

<frontmatter>
  <titlepage>
    <titleproper>Grand Canyon River Guides Collection, 1955-2005</titleproper>
    <author>Processed by: Richard Quartaroli</author>
    <publisher>Cline Library. Special Collections and Archives Department.<lb/>
    <extptr linktype="simple" href="library.nau.edu/speccoll/naulogo.gif"
    title="Image of Northern Arizona University" actuate="onload"
    show="embed"><lb/>
    </publisher>
    <p> &copy; <date>2006 </date></p>
  </titlepage>
</frontmatter>

```

Example of **<extref>** element providing hypertext with an external link to external content (i.e. link to another AAO finding aid):

```

<relatedmaterial>
  <p>
    <extref linktype="simple"
    href="http://www.azarchivesonline.org/xtf/view?docId=ead/nau/Grand_Canyon_Trust
    .xml" title="Grand Canyon Trust finding aid" actuate="onrequest"
    show="new">Grand Canyon Trust Collection</extref>
  </p>
</relatedmaterial>

```

## Long guides

Each XML finding aid file must be a complete finding aid. Do not divide the finding aid into smaller subparts. Longer guides will be pre-processed and indexed for searchability on the AAO web site and viewable pdf documents will be delivered to end users.

## Validating and creating well-formed guides

To ensure compliance with the EAD.DTD, contributing repositories should validate and check that their new and updated finding aid files are well-formed prior to uploading to the AAO web site. While most invalid guides will load and index, poorly formed finding aid files will not. To maintain the integrity and effectiveness of the best practices, contributing repositories are strongly urged to validate their guides with software designed as an XML editor, such as [oXygen/> XML Editor](#) or [Adobe Dreamweaver](#).

## Naming, Saving, and Updating a finding aid file

After opening a new finding aid template file, it's a good idea to use the "save as" command and name the file immediately – to ensure that your institutional template is not altered. As a safeguard, a copy of each institution's template will be available from the [Arizona Archives Online](#) (AAO) web site.

The AAO best practices strongly encourages that institutions use a consistent naming convention for saving and submitting their finding aid files, such as incorporating an institutional abbreviation (i.e. "UA") or implementing the MARC code as a prefix with an underscore to uniquely identify their files.

If your institution does not have an existing MARC code, instructions for requesting a code for your institution can be found on the [Library of Congress MARC Code List for Organizations](#) web page. Existing MARC codes can be found at <http://www.loc.gov/marc/organizations/orgshome.html#searches>.

### ***Existing AAO Members MARC codes:***

Arizona Historical Society/Northern Arizona Division	AzFHi
Arizona Historical Society/Southern Arizona Division	AzTP
Arizona State Library, Archives, and Public Records	Az
Arizona State Museum	AzTuSM
Arizona State University	AzTeS
Center for Creative Photography	AzU-CCP
Heard Museum	AzPhBJB
Museum of Northern Arizona	AzFM
Northern Arizona University	AzFU

Postal History Foundation	AzTuPHF
Sharlot Hall Museum	AzPrSH
University of Arizona	AzU

#### *File Naming Reminders:*

Filenames must end with an .xml extension

Filenames may include upper and lowercase letters, numbers, and underscores

Filenames should contain no spaces or dashes. Spaces and dashes will affect the AAO indexing functionality!

Filename examples:

#### **AzFM\_MS608.xml**

*AzFM* is the MARC code for the Museum of Northern Arizona, *MS608* is the collection number assigned to the collection by the Museum of Northern Arizona.

## **Editing and Updating Existing Finding Aids**

If a finding aid file is edited or updated and resubmitted to the AAO web site, do not assign a new filename to the updated file (use the original or identical file name). If the updated finding aid file is intended to replace the previous version of the file -- it must have exactly the same filename. When uploading an edited guide with an ftp program, a dialog box should warn you that the existing file on the AAO web site will be overwritten. Click the 'yes' button to replace the original file residing on the AAO web site. The AAO index is updated automatically at night.

## **Note on Using EAD Guideline Tables**

*Elements/Attributes* – Encoded Archival Description tag and underlying attributes allowed for each tag.

*Status* -- The guidelines indicate whether an element is required or not by using one of the following four codes:

**Req** = Required. This EAD tag is required as described in the Notes column.

**MA** = Mandatory when applicable. This EAD tag is mandatory when the information is available or discernable as described in the Notes column.

Rec = Recommended. This EAD tag is strongly recommended in order to facilitate access to a collection as described in the Notes column.

Opt = Optional. The EAD tag may be used if desired.

*Repeatable?* – Column indicates whether element can (Y) or cannot (N) be repeated within the archival finding aid.

*Comments/Application Notes* – Explanation and examples of tag element and attribute use. In addition, it contains any special instructions or comments relevant to the element or attribute in question.

*Encoding Analogs* – Serves as 'crosswalks between EAD elements and the Describing Archives: A Content Standard (DACs).

Table 1: &lt;eadheader&gt; and &lt;frontmatter&gt;

Elements and Attributes	Status	Repeatable?	Comments/Application Notes	DACS
<i>Elements are surrounded by angle brackets and rendered in boldface.</i>			Req=Required MA=Mandatory, if applicable Rec=Recommended by best practices guidelines Opt=Optional	
<?xml version="1.0" encoding="utf-8"?>	<b>Req</b>		XML declaration, presence in all AAO templates.	
<i>stylesheet declaration</i>			A style sheet declaration <u>will not be part of the standard AAO template</u> . If you would like to render or view the finding aid in a web browser (Microsoft IE), it is possible to add a style sheet declaration to the template. <u>Please delete declaration after viewing and before uploading to the AAO web site.</u>  Example: <b>&lt;?xml-stylesheet type="text/xsl" href=" template.xsl" ?&gt;</b>  <i>Place the guide and the stylesheet (template.xsl) in the same directory to render in Microsoft Internet Explorer.</i>	
DOCTYPE declaration	<b>Req</b>		The DOCTYPE declaration points to the name, version, and location of the XML.DTD (document type definition) or rules used to create and valid the xml document. This declaration is presence in all AAO templates. Here is the declaration used in AAO templates:  <b>&lt;!DOCTYPE ead PUBLIC "-//ISBN 1-931666-00-8//DTD ead.dtd (Encoded Archival Description (EAD) Version 2002)//EN" "http://www.asu.edu/asuns/dtd/ead.dtd"&gt;</b>	
<b>&lt;ead&gt;</b>	<b>Req</b>	N	Parent or top "wrapper" element for an EAD finding aid.	
<b>&lt;eadheader&gt;</b>	<b>Req</b>	N	Wrapper element containing information about the finding aid document.	
langencoding="iso639b"	<b>Req</b>		Set to "iso639-2b". Conveys the standard used for language codes.	
scriptencoding="iso15924"	<b>Req</b>		Set to "iso15924". Conveys the standard used for script codes.	
relatedencoding="dc"	<b>Req</b>		Set to "dc". dc stands for "Dublin Core" Indications the metadata schema used	

			to map <eadheader> elements for indexing and discovery.	
repositoryencoding="iso15511"	Req		Set to "iso15511". Conveys the standard used for establishing repository codes.	
countryencoding="iso3166-1"	Req		Set to "iso31661." Conveys the standard used for country codes.	
dateencoding="iso8601"	Req		Set to "iso8601." Conveys the standard used for date formats.	
<eadid>	Req	N	EAD identifier. This element and its attributes are used to provide unique information about the specific EAD finding aid.	
countrycode="us"	Req		States the country code using the iso3166-1 format.	2.1.5
mainagencycode=	Req		Use the repository code supplied by the Library of Congress for your institution. The code should follow the iso15511 format. Repository codes and instructions for requesting a code for your institution can be found on the <a href="#">Library of Congress MARC Code List for Organizations</a> web page.	2.1.4
publicid			Enter the full name of the repository/institution where archival materials reside.	
encodinganalog="identifier"	Req		Maps <eadid> element to Dublin Core identifier field.	
<filedesc>	Req	N	Wrapper element for bibliographic information of finding aid.	
<titlestmt>	Req	N	Wrapper element for finding aid title information.	
<titleproper>	Req	N	Use for the official title of the finding aid (i.e. <b>Inventory of the Morris Udall Papers</b> ).	
encodinganalog="title"	Req		Maps <titleproper> element to Dublin Core title field.	
<date>	Req	N	The <date> element is used to convey the span of dates of described materials. The use <date> element should be within the <titleproper> element. (i.e. <titleproper>Inventory of the Morris Udall Papers <date>1933-1980.</date></titleproper>).	
era="ce"	Rec		Default value presence in AAO templates.	
calendar="gregorian"	Rec		Default value presence in AAO templates.	
normal=	Req		Enter normalized date span of described materials. Use the iso8601 format (e.g. normal="1933/1980").	
encodinganalog="date"	Req		Maps <date> element to Dublin Core date field.	
<titleproper> [filing title]	Req		This instance of <titleproper> is a modified form of the title used to alphabetically sort by collection titles. The filing title should start with a person's last name, followed by the first name and, if used, middle initial of the creator, collector, or associated individual in enclosed with parenthesis. Filing rules for corporate bodies (businesses, associations, or organizations) should be listed as they appear in the initial <titleproper> element.  Here are some examples of filing title for <titleproper> (without EAD elements):	

			<b>Udall (Morris K.) Papers</b> <b>Udall (Morris K. and Stewart) Papers</b> <b>Day Family Diaries</b> <b>Blue Moon Publishing Company Records</b> <b>United Indian Traders Association Photographs</b>	
type="filing"	<b>Req</b>		States that this <titleproper> element is intended for filing purposes.	
altrender="nodisplay"	<b>Req</b>		States that this <titleproper> element is not intended to be used for Web or print display.	
<author>	MA	N	Name of person(s) or institution responsible for creating the intellectual content of the finding aid.	8.1.5
encodinganalog="creator"	MA		Maps <author> element to the Dublin Core creator field.	
<publicationstmt>	<b>Req</b>	N	Wrapper element for information about publication of finding aid.	
<publisher>	<b>Req</b>	Y	Name of publisher of finding aid. Usually the name of the repository housing the archival collection.	
encodinganalog="publisher"	<b>Req</b>		Maps <publisher> element to the Dublin Core publisher field.	
<date>	<b>Req</b>	N	Date of publication of finding aid.	
era="ce"	Rec		Default value presence in AAO templates.	
calendar="gregorian"	Rec		Default value presence in AAO templates.	
normal=	<b>Req</b>		Enter normalized date, publication date, or copyright date for finding aid. Use the <a href="#">iso8601</a> format (e.g. normal="2011").	
encodinganalog="date"			Maps <date> element to the Dublin Core date field.	
<address>	<b>Req</b>	Y	Wrapper element for the address of the repository housing the described archival materials.	
<addressline>	<b>Req</b>	Y	The <addressline> element is repeatable as needed to list the repository name, street address, city, state, zip code, phone number, fax number, email address, and repository URL.	
<profiledesc>	<b>Req</b>	N	Wrapper element to record information about encoding version and the language(s) of the finding aid.	
<creation>	MA	N	Statement describing the creation or encoding of the finding aid. Lists name of encoder(s) and/or institution, if available.	8.1.5
<date>	Rec		Date of original encoding in EAD.	8.1.5
era="ce"	Rec		Default value presence in AAO templates.	
calendar="gregorian"	Rec		Default value presence in AAO templates.	
normal=	Rec		Enter normalized original date of encoding. Use the <a href="#">iso8601</a> format (e.g. If the original creation date for encoding of March 2011 should be entered like this:	



			<b>normal="2011-03").</b>  March 23, 2011 should be entered like this: <b>normal="20110323"</b>	
<b>&lt;language&gt;</b>	<b>Req</b>	N	Statement about the language(s) that are used in the encoded finding aid.	
<b>&lt;language&gt;</b>	<b>Req</b>	Y	Repeat the <language> element as needed to encode each language represented in the text of the finding aid.  <u>Do not confuse with the &lt;langmaterial&gt; element used in the &lt;archdesc&gt; section of the EAD guide used to specify the language(s) represented in the materials that comprise the collection being described.</u>	
encodinganalog="language"	<b>Req</b>		Maps <language> element to the Dublin Core language field.	
langcode="eng"	<b>Req</b>		Refer to <a href="#">iso639-2b</a> for the correct language code. AAO templates are set to default value: <b>langcode="eng"</b>	
scriptcode="latn"	<b>Req</b>		Refer to <a href="#">iso15924</a> for correct script code. AAO templates are set to default value: <b>scriptcode="latn"</b>	
<b>&lt;revisiondesc&gt;</b>	Rec	N	Record information about significant changes that were made to the original encoded finding aid. Use the <change> element to record each major revision. Each major revision should contain a description of the change using the <item> element and the date of the change using the <date> element.	
<b>&lt;change&gt;</b>	Rec	Y	Wrapper element containing descriptive information about the change, as well as the date of the revision.	
<b>&lt;item&gt;</b>	Rec	Y	Describes specific significant revision made to the original encoded finding aid.	8.1.5
<b>&lt;date&gt;</b>	Rec	Y	Date of revision (e.g. <b>April 2011</b> ).	8.1.5
era="ce"	Rec		Default value presence in AAO templates.	
calendar="gregorian"	Rec		Default value presence in AAO templates.	
normal=	Rec		Enter normalized date of significant revision to encoding. Use the <a href="#">iso8601</a> format (e.g. If the revision date for encoding of March 2011 should be entered like this: <b>normal="2011-03"</b> ).  March 23, 2011 should be entered like this: <b>normal="20110323"</b>	
<b>&lt;frontmatter&gt;</b>	<b>Req</b>	N	AAO templates will contain this wrapper element. The AAO style sheet will render and display the text encoded within the <frontmatter><titlepage> wrapper elements prominently at the beginning of each finding aid.	
<b>&lt;titlepage&gt;</b>	<b>Req</b>	N	The use of the wrapper element <titlepage> accommodates the display of the collection title, collection dates, local call number, and repository name.	
<b>&lt;titleproper&gt;</b>	<b>Req</b>	N	Duplicate the title of the finding aid from the <eadheader> section. (i.e.	

			<b>Inventory of the Morris Udall Papers</b> ). – not used for alphabetizing (do not invert).	
encodinganalog="245\$a"	<b>Req</b>		Maps <titleproper> element to MARC title field.	
<date>	<b>Req</b>	N	The <date> element is used to convey the inclusive span of dates of described materials. The use <date> element should be within the <titleproper> element. (i.e. <titleproper>Inventory of the Morris Udall Papers <date> <b>1933-1980.</b> </date></titleproper>).	
<num>	<b>Req</b>	N	The <num> element is used to convey the local call number(s) described in the finding aid. Use the <lb/> element to provide line breaks between multiple local call numbers. (i.e. <num> <b>NAU.MS.280&lt;lb/&gt;NAU.PH.99.10&lt;/num&gt;</b> ).	
<publisher>	<b>Req</b>	N	The <publisher> element is used to name of the repository housing the archival collection.	
<p>	<b>Req</b>	Y	Add a <p> wrapper paragraph element to convey the date the finding aid was initially published. (i.e. <b>©2002 Arizona Board of Regents. All rights reserved</b> ).	

Table 2: &lt;archdesc&gt;

Elements and Attributes	Status	Repeatable?	Comments/Application Notes	DACS
<i>Elements are surrounded by angle brackets and rendered in boldface.</i>			Req=Required MA=Mandatory, if applicable Rec=Recommended by best practices guidelines Opt=Optional	
<b>&lt;archdesc&gt;</b>	<b>Req</b>	<b>N</b>	Wrapper element for archival description of materials being described in the finding aid.	
level="collection"	<b>Req</b>		Attribute used to define portion of the materials being described in the finding aid.  AAO encourages the use of the following <u>level</u> attribute values: "collection" "recordgrp" "series" "subseries" "otherlevel"  <b>AAO templates will have the default value of "collection".</b>	Chap. 1
relatedencoding="marc21"	<b>Req</b>		Defines the encoding system (i.e. MARC for the 21 <sup>st</sup> Century) used to map <archdesc> elements.  <b>AAO templates will have the marc21 default values entered at the top level of the &lt;archdesc&gt; level.</b>	
<b>&lt;did&gt;</b>	<b>Req;</b>	N	Wrapper element for core information about the described collection/record group. <did> should be used at the top-level <archdesc> or at any component level <c0x>.	
<b>&lt;unitid&gt;</b>	<b>Req</b>	Y	This element is considered an essential element for data exchange by ISAD(G)v2. Enter local "call number" or "control number" used to identify archival materials being described.	2.1.3
encodinganalog="099"	Rec		<b>AAO templates will have the default value of "099".</b>	
countrycode="us"	<b>Req</b>		<b>AAO templates will have the default value of "us".</b>	2.1.5
repositorycode=	<b>Req</b>		<b>AAO templates will have the value of the repository.</b> The code should follow the iso15511 format. Repository codes and instructions for requesting a code for your institution can be found on the <a href="#">Library of Congress MARC Code List for Organizations</a> web page.	2.1.4

<b>&lt;origination&gt;</b>	MA	N	Wrapper element containing information about the individual or organization responsible for the creation, accumulation, or assembly of the described materials before their incorporation into an archival repository. This tag may be used to indicate records creators, collectors, and dealers.	2.6
<b>&lt;persname corpname famname &gt;</b>	MA	N	Information about the individual or organization responsible for the creation, accumulation, or assembly of the described materials before their incorporation into an archival repository. This tag may be used to indicate records creators, collectors, and dealers.  <persname> - use when an individual is the creator/collector of the materials. <famname>- use when a family is the creator/collector of the materials. <corpname>- use when a business or association is the creator/collector of the materials.	Chap. 9, 12, 14
encodinganalog="100 110 111"	Rec		Enter "100" for personal name; "100" for family name; "110" for corporate name; "111" for meeting or conference name. Note that both the name of an organization (MARC 110) and the name of a meeting or conference (MARC 111) are mapped to the EAD <corpname> element.	
role="creator collector photographer"	Rec		What is the defined role of the entity contained in the <origination> element.	
source="lcnaf"	Rec		If the name <i>was found in the LC Name Authority File</i> , enter "lcnaf" in the SOURCE attribute and <b>do not use the RULES attribute</b> (below).	
rules="aacr2 dacs"	Rec		If the name was <i>not found in the LC authority file</i> but was formulated using DACS or AACR2 rules, enter "dacs" or "aacr2" in the RULES attribute and do not use the SOURCE attribute (above).	
<b>&lt;unittitle&gt;</b>	<b>Req</b>	Y	The title [transcribed or supplied] of the described materials.  If the collection title includes within it the name of a publication, such as the title of a magazine, periodical, or newspaper, enclose the publication name in a <title> element, and set the <title> element's RENDER attribute to "italic".	2.3
encodinganalog="245\$a"	Rec		Default value presence in AAO templates, maps to the MARC title field.	
<b>&lt;unitdate&gt;</b>	<b>Req</b>	Y	US repository following APPM practice normally include <unitdate> as part of <unittitle>, whereas British and Canadian practice, following ISAD(G)v2 use <unitdate> at the same level as <unittitle>. Given the trend for further	2.4

			international standardization, separate title and date is preferred but both practices are permitted. DACS separates <unittitle> from <unitdate> and should be considered the descriptive standard for encoding. Repeat <unitdate> if both inclusive and bulk dates are given. This element is considered an essential element for data exchange by ISAD(G)v2. Use for the creation year, month, or day of the described materials.	
type="inclusive bulk"	Req		Use "inclusive" for the entire date range; use "bulk" only as a repeat <unitdate> instance where predominant dates are present and might give the user a better indication of the bulk or majority of the collection's dates.  <b>AAO templates will have the default value of "inclusive"</b> – but repositories should use a repeated instance of <unitdate> for "bulk" when they feel its' warranted.	
normal=	Req		Enter normalized date span of described materials. Use the <a href="#">iso8601</a> format (e.g. normal="1933/1980").	
encodinganalog="245\$f 245\$g"	Rec		"245\$f" for inclusive dates; "245\$g" for bulk dates.  <b>AAO templates will have the default value of "245\$f".</b>	
<physdesc>	Req	Y	A wrapper element for physical details about the described materials. Use subelements <extent>, <physfacet>, <dimensions>, and if desired, <genreform> to record the information.	2.5
<extent>	Req	Y	State extent of space occupied (in linear or cubic feet) and/or number of containers and/or items. If desired, include additional details concerning types and formats of material, as in the first example below. Use separate <extent> tags inside a single <physdesc> to state the same information in different ways (e.g., one <extent> element for cubic feet and another <extent> element for number of containers, both nested inside the same <physdesc> element).  For example: <physdesc> <extent>2.5 cubic feet, including textual materials, photographs, and videocassettes</extent> <extent>5 boxes</extent> </physdesc>  <physdesc> <extent>738 photographic prints</extent>	2.5

			<i>&lt;extent&gt;37 glass negatives&lt;/extent&gt;</i>	
encodinganalog="300\$a"	Rec		<b>AAO templates will have the default value of "300\$a".</b>	
<b>&lt;physfacet&gt;</b>	Opt	N	Use to record physical facet of material being described. For the proper terms and syntax for describing the physical aspects of specific types of non-textual materials, consult the appropriate list in DACS.  See EAD tag library for information on use of this element.	2.5 (Purpose and Scope); Appendix B
<b>&lt;dimensions&gt;</b>	Opt	N	Use to record the specific measurement for certain types of materials, such as the height and width of photographs or the size of audio and video tapes).  See EAD tag library for information on use of this element.	2.5 (Purpose and Scope); Appendix B
<b>&lt;materialspec&gt;</b>	Opt	N	Use to record other descriptive information about the material being described, such as the recording speed of reel-to-reel tapes or the projection used to create a map.  See EAD tag library for information on use of this element.	2.5 (Purpose and Scope); Appendix B
<b>&lt;abstract&gt;</b>	Req	N	User for brief descriptive information of collection contents at highest level, in addition to <scopecontent> for fuller discussion. At component level, use <scopecontent> rather than <abstract>.	3.1
encodinganalog="520"	Rec		<b>AAO templates will have the default value of "520".</b>	
<b>&lt;langmaterial&gt;</b>	Req	N	Wrapper element naming the language(s) found in the described materials. One or more language name(s) are enclosed in a nested <language> element.  If the collection, such as a photograph collection, contains no associated text, state that fact in <langmaterial> using wording similar to the following:  <i>&lt;langmaterial&gt;No textual or other language materials are included in the collection.&lt;/langmaterial&gt;</i>	
<b>&lt;language&gt;</b>	MA	Y	Nested within the <langmaterial> element, use to encode the language of the materials being described:  <i>&lt;langmaterial&gt;Diary entries written in &lt;language langcode="fre"&gt;French&lt;/language&gt; and &lt;language langcode="ger"&gt;German.&lt;/language&gt;</i>	

langcode="eng"	MA		Use <a href="#">ISO 6392b</a> to determine correct language code.  <b>AAO templates will have the default value of "eng".</b> – if another language, change to correct language code.	
encodinganalog="546"	Rec		<b>AAO templates will have the default value of "546".</b>	
<repository>	Req	N	Wrapper element for institution or repository that houses and provides access to the described materials.	
<corpname>	Req	N	Name of the repository (e.g. <b>Center for Creative Photography</b> or <b>Museum of Northern Arizona</b> ).	2.2.2
encodinganalog="852\$a"	Rec		<b>AAO templates will have the default value of "852\$a".</b>	
<subarea>	MA	Y	If there is a secondary administrative level within a repository, use the <subarea> to note the name of the secondary level. (e.g. <b>Arizona Collection</b> ).	2.2.2
encodinganalog="852\$b"	Rec		<b>AAO templates will have the default value of "852\$b"</b> – for repositories' templates where a secondary level exists.	
<address>	MA	Y	Wrapper element used to encode the address information for the repository.	2.2.3
<addressline>	MA	Y	Use one <addressline> element for each line of postal or other address information; repeat as many times as necessary to include all lines of address, if desired. May contain email address, contact phone number(s), etc.  For example: <i>&lt;addressline&gt;P.O. Box 6022 &lt;/addressline&gt; &lt;addressline&gt;Flagstaff, AZ 86011-6022&lt;/addressline&gt; &lt;addressline&gt;928-523-5551&lt;/addressline&gt; &lt;addressline&gt;special.collections@nau.edu&lt;/addressline&gt; &lt;addressline&gt; http://www.nau.edu/library/speccoll/ &lt;/addressline&gt;</i>	
<accessrestrict>	Req	N	Use to record Information about conditions that affect the availability of the described materials being described. May indicate the need for an appointment or the nature of the restrictions imposed by the donor, legal statute, repository, or other agencies. Should also include lack of restrictions (i.e. "No restrictions on access"). Do not confuse with conditions governing use.  Text should be enclosed in paragraph <p> tags </p>. If needed, the paragraph <p></p> tags are repeatable within the <accessrestrict>	4.1; 4.2

			element.	
encodinganalog="506"	Rec		<b>AAO templates will have the default value of "506".</b>	
<a href="#">&lt;userrestrict&gt;</a>	MA	N	Use to record information about conditions that affect use of the described materials after access has been granted. Examples include limitations, regulations, or special procedures imposed by a repository, donor, legal statue, or other agency regarding reproduction, publication, or quotation of the described materials. May also indicate the absence of restrictions.  Text should be enclosed in paragraph <p> tags </p>. If needed, the paragraph <p></p> tags are repeatable within the <userrestrict> element.	4.4
encodinganalog="540"	Rec		<b>AAO templates will have the default value of "540".</b>	
<a href="#">&lt;prefercite&gt;</a>	Rec	N	Use to record information about how users should identify the described materials when referring to them in published credits.  Text should be enclosed in paragraph <p> tags </p>. If needed, the paragraph <p></p> tags are repeatable within the <prefercite> element.	7.1.5
encodinganalog="524"	Rec		<b>AAO templates will have the default value of "524".</b>	
<a href="#">&lt;acqinfo&gt;</a>	MA	N	Use to record immediate source of the materials being described and the circumstances under which they were received., includes donations, transfers, purchases, and deposits.  Text should be enclosed in paragraph <p> tags </p>. If needed, the paragraph <p></p> tags are repeatable within the <acqinfo> element.	5.2
encodinganalog="541"	Rec		<b>AAO templates will have the default value of "541".</b>	
<a href="#">&lt;accruals&gt;</a>	Opt	N	Use to record information about anticipated or regular additions to described materials.  Text should be enclosed in paragraph <p> tags </p>. If needed, the paragraph <p></p> tags are repeatable within the <accruals> element.	5.4
encodinganalog="584"	Rec		<b>AAO templates will have the default value of "584".</b>	
<a href="#">&lt;custodhist&gt;</a>	Rec	N	Use to record Information about the chain of ownership of the materials being described before they reach the immediate source of acquisition.  Text should be enclosed in paragraph <p> tags </p>. If needed, the paragraph <p></p> tags are repeatable within the <custodhist> element.	5.1
encodinganalog="561"	Rec		<b>AAO templates will have the default value of "561".</b>	



<a href="#">&lt;appraisal&gt;</a>	Opt	N	Use to record information about the process determining the archival value and thus the disposition of records based upon their current administrative, legal, and fiscal use; evidential, intrinsic, and informational value; arrangement and condition; and relationship to other records.  See EAD tag library for information on use of this element.	
<a href="#">&lt;processinfo&gt;</a>	Rec	N	Use to record information about processing activities, such as accessioning, organizing, describing, preserving, and storing the described materials.  Text should be enclosed in paragraph <p> tags </p>. If needed, the paragraph <p></p> tags are repeatable within the <processinfo> element.	8.1
encodinganalog="583"	Rec		<b>AAO templates will have the default value of "583".</b>	
<a href="#">&lt;separatedmaterial&gt;</a>	Rec	N	Use to record information about materials that are associated by provenance to the described materials, but that have been physically separated or removed.  Text should be enclosed in paragraph <p> tags </p>. If needed, the paragraph <p></p> tags are repeatable within the <separatedmaterial> element.	6.3
encodinganalog="5440"	Rec		<b>AAO templates will have the default value of "5440".</b>	
<a href="#">&lt;relatedmaterial&gt;</a>	Rec	N	Element should be used to record relevant collections that are not physically or logically included within the materials described in the collection inventory (finding aid), but that may be of use to a researcher because of an association to the described materials. Materials designated by this element are not related to the described material by provenance, accumulation, or use.  Text should be enclosed in paragraph <p> tags </p>. If needed, the paragraph <p></p> tags are repeatable within the <relatedmaterial> element.	6.3
encodinganalog="5441"	Rec		<b>AAO templates will have the default value of "5441".</b>	
<a href="#">&lt;altformavail&gt;</a>	Rec	N	Use to record information about copies of materials being described, including the type of alternative form, significant control numbers, location, and source for ordering if applicable. The additional formats are typically microforms, photocopies, or digital reproductions.	6.2
encodinganalog="530"	Rec		<b>AAO templates will have the default value of "530".</b>	

<a href="#">&lt;otherfindaid&gt;</a>	Rec	N	<p>Use to record information about additional or alternative guides to the described materials, such as card files, dealers' inventories generated by the creator or compiler of the materials. It is used to indicate the existence of additional collection inventories; it is not designed to encode the contents of those guides.</p> <p>Text should be enclosed in paragraph &lt;p&gt; tags &lt;/p&gt;. If needed, the paragraph &lt;p&gt;&lt;/p&gt; tags are repeatable within the &lt;otherfindaid&gt; element.</p>	4.6
encodinganalog="555"	Rec		<b>AAO templates will have the default value of "555".</b>	
<a href="#">&lt;bioghist&gt;</a>	MA	Y	<p>Concise essay or chronology that places the archival material in context by providing information about their creator. Includes significant information about the life of an individual or family, or the administrative history of a corporate body.</p> <p>Text should be enclosed in paragraph &lt;p&gt; tags &lt;/p&gt;. &gt;. If needed, the paragraph &lt;p&gt;&lt;/p&gt; tags are repeatable within the &lt;bioghist&gt; element.</p>	
encodinganalog="545"	Rec		<b>AAO templates will have the default value of "545".</b>	2.7
<a href="#">&lt;head&gt;</a>	Rec	Y	<p>In order to distinguish a <i>biographical note</i> (biographical information about the person or family who created a collection of papers), from a <i>historical note</i> (background information about the organization or agency that created a collection of records), the &lt;head&gt; element may be used inside &lt;bioghist&gt; to record the appropriate heading.</p> <p>Either use one of the following: "Biographical Note" (person or family history); "Historical Note" (historical information about a business or organization); or "Administrative History" (government agency).</p> <p>This is the only &lt;head&gt; element in the &lt;archdesc&gt; portion of the finding aid. All other headings are defined by the style sheet.</p> <p><b>AAO templates will leave the &lt;head&gt; element blank.</b></p>	
<a href="#">&lt;scopecontent&gt;</a>	Req	N	<p>Use to provide a general description of the topical range and content, including notes on the document types and formats of the described materials. If the organization/arrangement information cannot readily be separated from the scope note, give as part of &lt;scopecontent&gt;. If separable, use &lt;arrangement&gt; and do not nest within &lt;scopecontent&gt;.</p>	3.1

			Text should be enclosed in paragraph <p> tags </p>. >. If needed, the paragraph <p></p> tags are repeatable within the <scopecontent> element.	
encodinganalog="520"	Rec		<b>AAO templates will have the default value of "520".</b>	
<arrangement>	MA	N	Use to record the filing sequence of the described material (e.g., alphabetical or chronological) and/or the manner in which the collection has been ordered (e.g., organized into series).  Text should be enclosed in paragraph <p> tags </p>. If needed, the paragraph <p></p> tags are repeatable within the <arrangement> element.	3.2
encodinganalog="351"	Rec		<b>AAO templates will have the default value of "351".</b>	
<bibliography>	Opt	N	Use to record citations to works that are based on, about, or of special value when using the materials being described, or works in which a citation to or brief description of the materials is available. The works could be books, articles, television programs, unpublished reports, web sites, or other forms of information.  Text should be enclosed in paragraph <p> tags </p>. If needed, the paragraph <p></p> tags are repeatable within the <bibliography> element.  See EAD tag library for information on use of this element.	6.4
encodinganalog="581"	Rec		<b>AAO templates will have the default value of "581".</b>	
<controlaccess>	MA	Y	Wrapper element that designates key access points for the described materials and enables authority-controlled searching and browsing across finding aids on a computer network.  Hundreds of names and subjects can appear in a finding aid. Prominence can be given to the major ones by bundling them together in a single place within the <archdesc>.  Each sub-element requires either a SOURCE -or- RULES attribute, as appropriate. Use a SOURCE attribute to encode the source (i.e., thesaurus, authority file) of an established list of indexing terms. If the term is not found in an established list, then do not use a SOURCE attribute. Use instead a RULES attribute to indicate the content standard by which the term is constructed, e.g., "lcsh", "aacr", "dacs". If the term is not	

			<p>constructed according to an established content standard, encode the RULES attribute value as "local".</p> <p>The &lt;list&gt; and &lt;item&gt;(s) elements, although not necessary, can nest the controlled access terms: &lt;persname&gt;, &lt;famname&gt;, &lt;corpname&gt;, &lt;subject&gt;, &lt;geogname&gt;, &lt;genreform&gt;, &lt;occupation&gt;, &lt;function&gt;, and &lt;title&gt;. AAO style sheet will format the controlled access terms together by type when guide is rendered in a web browser.</p> <p>Nested with &lt;list&gt; and &lt;item&gt; tags:</p> <pre>&lt;controlaccess&gt;   &lt;list type="simple"&gt;     &lt;item&gt;&lt;persname encodinganalog="600" source="lcnaf"&gt;Udall, Morris K., 1922-&lt;/persname&gt;&lt;/item&gt;     &lt;item&gt;&lt;persname encodinganalog="600" source="lcnaf"&gt;Abbey, Edward, 1927-1989-&lt;/persname&gt;&lt;/item&gt;     &lt;item&gt;&lt;subject encodinganalog="650" source="lcsch"&gt;Legislators-- Arizona&lt;/subject&gt;&lt;/item&gt;     &lt;item&gt;&lt;subject encodinganalog="650" source="lcsch"&gt;Authors-- Arizona&lt;/subject&gt;&lt;/item&gt;     &lt;item&gt;&lt;subject encodinganalog="650" source="lcsch"&gt;Environmental laws—United States&lt;/subject&gt;&lt;/item&gt;   &lt;/list&gt; &lt;/controlaccess&gt;</pre> <p>Without &lt;list&gt; and &lt;item&gt; tags:</p> <pre>&lt;controlaccess&gt;   &lt;persname encodinganalog="600" source="lcnaf"&gt;Udall, Morris K., 1922- &lt;/persname&gt;   &lt;persname encodinganalog="600" source="lcnaf"&gt;Abbey, Edward, 1927-1989- &lt;/persname&gt;   &lt;subject encodinganalog="650" source="lcsch"&gt;Legislators--Arizona&lt;/subject&gt;   &lt;subject encodinganalog="650" source="lcsch"&gt;Authors--Arizona&lt;/subject&gt;   &lt;subject encodinganalog="650" source="lcsch"&gt;Environmental laws—United States&lt;/subject&gt; &lt;/controlaccess&gt;</pre>	
<persname>	MA	Y	Access terms related to personal names of significant subjects and/or contributors of described materials.	2.6; 9; 12

			<p>Use the form of the name located in a standard naming authority file, such as the <a href="#">Library of Congress Name Authority File</a>. If a name does not appear in an authority file, establish the name according to a content standard such as DACS, or AACR2.</p> <p>Controlled subheadings for personal names should be separated by a double hyphen – (with no spaces between heading terms and hyphens). Except for a period needed for a middle initial in a personal name, do not end a personal name heading with a period (.) – the AAO style sheet will supply the ending period when required by AACR2.</p> <p><code>&lt;persname encodinganalog="600" source="lcnaf"&gt;Babbitt, Bruce E.&lt;/persname&gt;</code></p> <p><code>&lt;persname encodinganalog="600" rules="aacr2"&gt;Smith, Wilma, 1967-&lt;/persname&gt;</code></p>	
encodinganalog="600 700"	Rec		<p><b>AAO templates will have the default value of "600".</b> Change to encodinganalog="700", if &lt;persname&gt; in controlled access plays the role of contributor.</p>	
source=	MA		<p><b>AAO templates will leave the default value blank.</b></p> <p>If heading is found in the <a href="#">Library of Congress Name Authority File</a>, assign source="lcnaf".</p> <p>If heading is found in an existing or legacy local catalog system, assign source="local".</p> <p>If heading is not found in the Library of Congress Name Authority File, delete the source attribute and use the RULES attribute to indicate how the name is established.</p>	
rules=	MA		<p><b>AAO templates will leave the default value blank.</b></p> <p>If there is no name authority record available for a particular name, establish the name heading and use "aacr2" to indicate that the name has been formulated according to AACR2 rules. If the form of the name is not based on a content standard such as AACR2, use "local" instead.</p>	

			If the name is taken from a standard name authority file, delete the RULES attribute and identify the name authority source in the SOURCE attribute.	
<famname>	MA	Y	<p>Access terms related to family names of significant subjects and/or contributors of described materials.</p> <p>Since family names are not maintained by the Library of Congress Name Authority File, establish the name according to the DACS standard: State the family surname followed by the word "family." Base the decision on published works about the family or reference sources, where available.</p> <p>Controlled subheadings for family names should be separated by a double hyphen – (with no spaces between heading terms and hyphens). Do not end the heading with a period.</p> <p>&lt;famname encodinganalog="600" rules="dacs"&gt;Goldwater family-- Archives&lt;/famname&gt;</p>	2.6; 9; 12.29
encodinganalog="600 700"	Rec		<b>AAO templates will have the default value of "600".</b> Change to encodinganalog="700", if <famname> in controlled access plays the role of contributor.	
rules="dacs"	MA		<b>AAO templates will have the default value of "dacs".</b>	
<corpname>	MA	Y	<p>Access terms related to corporate names of significant subjects and/or contributors of described materials.</p> <p>Use the form of the name located in a standard naming authority file, such as the <a href="#">Library of Congress Name Authority File</a>. If a name does not appear in an authority file, establish the name according to a content standard such as AACR2.</p> <p>Controlled subheadings for corporate names should be separated by a double hyphen – (with no spaces between heading terms and hyphens).</p> <p>&lt;corpname encodinganalog="610" source="lcnaf"&gt;Babbitt Brothers Trading Company&lt;/corpname&gt;</p> <p>&lt;corpname encodinganalog="610" rules="aacr2"&gt;Black Bean Burrito Company&lt;/corpname&gt;</p>	2.6; 9; 14
encodinganalog="610 611 710 711"	Rec		<b>AAO templates will have the default value of "610".</b> If heading is a conference name, change to encodinganalog="611".	

			Change to encodinganalog="710", if <corpname> in controlled access plays the role of contributor. Change to encodinganalog="711", if <corpname> in controlled access is a conference name and plays the role of contributor.	
source=	MA		<p><b>AAO templates will leave the default value blank.</b></p> <p>If heading is found in the <a href="#">Library of Congress Name Authority File</a>, assign source="lcnaf".</p> <p>If heading is found in an existing or legacy local catalog system, assign source="local".</p> <p>If heading is not found in the Library of Congress Name Authority File, delete the source attribute and use the RULES attribute to indicate how the name is established.</p>	
rules=	MA		<p><b>AAO templates will leave the default value blank.</b></p> <p>If there is no name authority record available for a particular name, establish the name heading and use "acr2" to indicate that the name has been formulated according to AACR2 rules. If the form of the name is not based on a content standard such as AACR2, use "local" instead.</p> <p>If the name is taken from a standard name authority file, delete the RULES attribute and identify the name authority source in the SOURCE attribute.</p>	
<subject>	MA	Y	<p>The form of the heading should be taken from a standard thesaurus, such as the <a href="#">Library of Congress Subject Headings</a> (LCSH).</p> <p>&lt;subject encodinganalog="650" source="lcsch"&gt;Authors--Arizona&lt;/subject&gt; &lt;subject encodinganalog="650" source="lcsch"&gt;Environmental laws—United States&lt;/subject&gt;</p>	
encodinganalog="650"	Rec		<b>AAO templates will have the default value of "650".</b>	
source=	MA		<p><b>AAO templates will leave the default value blank.</b></p> <p>If heading is found in the <a href="#">Library of Congress Subject Headings</a>, assign source="lcsch".</p> <p>If heading is found in an existing or legacy local catalog system, assign</p>	

			source="local".	
<geogname>	MA	Y	<p>Access terms related to places, natural features, or political jurisdictions.</p> <p>Take the geographic term from a standard geographic authority file, such as <a href="#">Library of Congress Subject Headings</a> or the <a href="#">Getty Thesaurus for Geographic Names</a>. If a term does not appear in an authority file, establish the term according to a content standard such as DACS.</p> <p>Controlled subheadings may be added as needed, separated by a double hyphen -- (with no spaces between heading terms and hyphens). Controlled subheadings for geography names should be separated by a double hyphen – (with no spaces between heading terms and hyphens). Do not end the heading with a period.</p> <p>&lt;geogname encodinganalog="651" source="lcsch"&gt;Grand Canyon (Ariz.)&lt;/geogname&gt;</p>	Chap. 13
encodinganalog="651"	Rec		<b>AAO templates will have the default value of "651".</b>	
source=	MA		Use "lcsch" if name is established in LCSH. Use abbreviation or code for any other authority from which heading is taken, e.g., "tgn". If name is unestablished, delete SOURCE attribute and use RULES attribute.	
rules=	MA		If there is no authority record available for a particular place, feature, or jurisdiction name, use rules="scm" to indicate that the name has been formulated according to the LC Subject Cataloging Manual. Delete SOURCE attribute.	
<title>	MA	Y	<p>Access terms related to titles of published works to which a collection is related, such as monographs, serials, or paintings represented prominently in the collection. Do not end in a period unless the title ends in an initial. Set the RENDER attribute to "italic" to emphasize that the access term is a title of a published work.</p> <p>&lt;title render="italic" encodinganalog="630" source="lctah"&gt;Arizona republic&lt;/title&gt;</p>	
encodinganalog="630 730 740"	Rec		<b>AAO templates will have the default value of "630".</b>	
source=	MA		Use "lctah" when title is established in LC Title or <a href="#">LC Name/Title Authority Headings</a> file. Use abbreviation or code for any other authority from which heading is taken. If title is unestablished, delete the SOURCE attribute and use the RULES attribute instead.	



rules=	MA		Use "acr2" if the title is not taken from an authorized source as described above, but is formulated according to AACR2. If title is established in the LC Name/Title Authority Headings, delete the RULES attribute and use the SOURCE attribute instead.
<genreform>	Rec	Y	<p>Access terms related to genre or form terms. Use one or more &lt;genreform&gt; tags to list major genres and/or forms of material represented in the materials described. To enhance retrieval by form/genre, add &lt;genreform&gt; entries for photographs, moving images, sound recordings, scrapbooks, diaries, artifacts, and oral histories.</p> <p>Controlled subheadings may be added as needed, separated by a double hyphen -- (with no spaces between heading terms and hyphens). Controlled subheadings for geography names should be separated by a double hyphen – (with no spaces between heading terms and hyphens). Do not end the heading with a period.</p> <p><b>&lt;genreform encodinganalog="655" source="aat"&gt;Color slides&lt;/genreform&gt;</b></p>
encodinganalog="655"	Rec		<b>AAO templates will have the default value of "655".</b>
source=	MA		<p>If the source of the genre term is from the <a href="#">Art &amp; Architecture Thesaurus (AAT)</a>, set the SOURCE attribute to source="aat".</p> <p>If the source of the genre term is from the <a href="#">Library of Congress Thesaurus for Graphic Materials -- form/genre terms</a>, set the SOURCE attribute to source="lctgm".</p>
<occupation>	Opt	Y	<p>Access terms related to types of work or professions. Use one or more &lt;occupation&gt; tags. Occupation terms may be placed in the &lt;subject&gt; element rather than the &lt;occupation&gt; element.</p> <p>Controlled subheadings may be added as needed, separated by a double hyphen -- (with no spaces between heading terms and hyphens). Controlled subheadings for geography names should be separated by a double hyphen – (with no spaces between heading terms and hyphens). Do not end the heading with a period.</p> <p>See EAD tag library for information on use of this element.</p>
encodinganalog="656"	Rec		<b>AAO templates will not contain an &lt;occupation&gt; element.</b>
source=	MA		If the source of the genre term is from the <a href="#">Art &amp; Architecture Thesaurus</a>

			<p>(AAT), set the SOURCE attribute to source="aat".</p> <p>If the source of the genre term is from the <a href="#">Library of Congress Subject Headings (LCSH)</a>, set the SOURCE attribute to source="lcsh".</p>	
<function>	Opt	Y	<p>Access terms related to activities and/or processes that generated the described materials. Function terms may be placed in the &lt;subject&gt; element rather than the &lt;function&gt; element.</p> <p>Controlled subheadings may be added as needed, separated by a double hyphen -- (with no spaces between heading terms and hyphens). Controlled subheadings for geography names should be separated by a double hyphen – (with no spaces between heading terms and hyphens). Do not end the heading with a period.</p> <p>See EAD tag library for information on use of this element.</p>	
encodinganalog="657"	Rec		<b>AAO templates will not contain a &lt;function&gt; element.</b>	
source=	MA		<p>If the source of the genre term is from the <a href="#">Art &amp; Architecture Thesaurus (AAT)</a>, set the SOURCE attribute to source="aat".</p> <p>If the source of the genre term is from the <a href="#">Library of Congress Subject Headings (LCSH)</a>, set the SOURCE attribute to source="lcsh".</p>	

Table 3: &lt;dsc&gt;

Elements and Attributes	Status	Repeatable?	Comments/Application Notes	DACS
<i>Elements are surrounded by angle brackets and rendered in boldface.</i>			Req=Required MA=Mandatory, if applicable Rec=Recommended by best practices guidelines Opt=Optional	
<b>&lt;dsc&gt;</b>	MA	N	Use one <dsc> element to encode the component hierarchy. The <dsc> element is not required for finding aids. The <dsc> tag is a wrapper element that groups information that reflects the hierarchical arrangement of the described materials. The Description of Sub-components section nests the components of a collection (i.e. recordgrp, subgrp, series, subseries, file, item, and other level). This should be a reflection of the intellectual arrangement of the described materials.	
type="combined analyticcover in-depth"	MA		<b>AAO templates will have the default value of "combined".</b>  Use the default attribute value of "combined" when each major subdivision (ie. recordgrp, subgrp, series, or subseries) is described and followed by a container list of narrower levels (ie. file or item).  Use the attribute value of "analyticcover" when only providing users with a description of the major subdivisions (ie. recordgrp, subgrp, series, or subseries) without describing narrower levels (ie. file or item) in a container list. This value may be used when describing summaries of subdivisions of an unprocessed collection.  Use the attribute value of "in-depth" when only providing users with a container list of narrower levels (ie. file or item).	
<b>&lt;c0x&gt;</b>	MA	Y	Encoders must use numbered (<c01>-<c12>) component elements; it provides a clearer view of the hierarchical structure.  Nested <c0x>s should be used as needed to reflect the intellectual structure of the archival materials.  The full suite of subelements and attributes described are available at each component level (e.g., all elements described in the <archdesc>	

			table, may also be used as needed in each component described in <dsc>), although this table and the AAO template will only contain the most commonly used elements for subcomponent descriptions (ie. <container>, <unitid>, <unittitle>, <unitdate>, <physdesc>, <extent>, and <scopecontent> elements.	
level="recordgrp collection subgrp series subseries file item"  (if "otherlevel" is used) – use otherlevel attribute in addition.  otherlevel="accession sub-subseries"	MA	N	Component levels should generally be subordinate to the level set in the level attribute found in the <archdesc> element.  The assignment of sub-component levels should be a reflection of the collection's arrangement. If the arrangement is <u>hierarchical</u> , then subsequent components will be smaller units of the preceding component – (ie. "series" then "subseries" then "file").  <c01 level="series"> <c02 level="subseries"> <c03 level="file"> <c03 level="file"> <c03 level="file">  If the arrangement is <u>flat</u> , then the use of a single component is all that is required.  <c01 level="file"> <c01 level="file"> <c01 level="file">	Chap. 1
<did>	MA	N	Wrapper element for core information about the described collection/record group. <did> should be used at the top-level <archdesc> or at any component level <c0x>.	
<unitid>	MA	Y	Enter the component's identification number and/or name that is used to specify the group or section of archival materials being described.	2.1.3
encodinganalog="099"	Opt		<b>AAO templates will not contain this attribute. Add to element, if desirable.</b>	
<container>	MA	Y	Use to record the type of physical container and specific or assigned container numbers where the described materials reside. This is almost exclusively done for the component levels with a "file" and/or "item" designate.  For finding aids that contain <i>only</i> higher-level component descriptions,	

			<p>such as series or subseries-level data, container information may be provided at the appropriate broader level.</p> <p>As needed, one or two &lt;container&gt; elements may be used in a given &lt;c0x&gt; entry. An entry that contains more than two &lt;container&gt; elements will not display correctly with the AAO style sheet.</p>	
type=	MA		<p>Use this attribute to record the type(s) of physical containers where the described material is being housed. Use the most appropriate terms to reflect the container type, such as "box" "folder" "box-folder" "album" "scrapbook" "reel" "verticalfile". There is <u>no</u> controlled vocabulary, but repositories should be consistent locally with their use of container terms.</p> <p>Multiple containers with the same title materials may also be grouped together:</p> <p><b>&lt;container type="box"&gt;1&lt;/container&gt;&lt;container type="folder"&gt;1-8&lt;/container&gt;</b></p> <p>or</p> <p><b>&lt;container type="box-folder"&gt;1.1 - 1.8&lt;/container&gt;</b></p>	
<unittitle>	MA	Y	<p>The title [transcribed or supplied] of the described materials.</p> <p>If the collection title includes within it the name of a publication, such as the title of a magazine, periodical, or newspaper, enclose the publication name in a &lt;title&gt; element, and set the &lt;title&gt; element's RENDER attribute to "italic".</p>	2.3
encodinganalog="245\$a"	Opt		<b>AAO templates will not contain this attribute. Add to element, if desirable.</b>	
<unitdate>	MA	Y	<p>US repository following APPM practice normally include &lt;unitdate&gt; as part of &lt;unittitle&gt;, whereas British and Canadian practice, following ISAD(G)v2 use &lt;unitdate&gt; at the same level as &lt;unittitle&gt;. Given the trend for further international standardization, separate title and date is preferred but both practices are permitted. DACS separates &lt;unittitle&gt; from &lt;unitdate&gt; and should be considered the descriptive standard for encoding. Repeat &lt;unitdate&gt; if both inclusive and bulk dates are given. This element is considered an essential element for data exchange by</p>	2.4

			ISAD(G)v2. Use for the creation year, month, or day of the described materials.	
type="inclusive bulk"	Opt		Use "inclusive" for the entire date range; use "bulk" only as a repeat <unitdate> instance where predominant dates are presence and might give the user a better indication of the bulk or majority of the collection's dates.  <b>AAO templates will not contain this attribute. Add to element, if desirable.</b>	
normal=	Opt		Enter normalized date span of described materials. Use the <a href="#">iso8601</a> format (e.g. normal="1933/1980").  <b>AAO templates will not contain this attribute. Add to element, if desirable.</b>	
encodinganalog="245\$f 245\$g"	Opt		"245\$f" for inclusive dates; "245\$g" for bulk dates.  <b>AAO templates will not contain this attribute. Add to element, if desirable.</b>	
<physdesc>	Opt	Y	A wrapper element for physical details about the described materials. Use subelements <extent>, <physfacet>, <dimensions>, and if desired, <genreform> to record the information.  <b>AAO templates will not contain the elements &lt;physfacet&gt; and &lt;dimensions&gt;. Add these elements as necessary.</b>	2.5
<extent>	MA	Y	State extent of space occupied (in linear or cubic feet) and/or number of containers and/or items. If desired, include additional details concerning types and formats of material, as in the first example below. Use separate <extent> tags inside a single <physdesc> to state the same information in different ways (e.g., one <extent> element for cubic feet and another <extent> element for number of containers, both nested inside the same <physdesc> element).  For example: <physdesc> <extent>6 color prints</extent> </physdesc>	2.5
encodinganalog="300\$a"	Opt		<b>AAO templates will not contain this attribute. Add to element, if</b>	

			<b>desirable.</b>	
<code>&lt;langmaterial&gt;</code>	Rec	N	<p>Wrapper element naming the language(s) found in the described materials. One or more language name(s) are enclosed in a nested <code>&lt;language&gt;</code> element.</p> <p>If the collection, such as a photograph collection, contains no associated text, state that fact in <code>&lt;langmaterial&gt;</code> using wording similar to the following:</p> <p><i><code>&lt;langmaterial&gt;No textual or other language materials are included in the collection.&lt;/langmaterial&gt;</code></i></p> <p><b>AAO templates will not contain the element in the <code>&lt;dsc&gt;</code>. Add the element, if desirable.</b></p>	
<code>&lt;language&gt;</code>	Rec	Y	<p>Nested within the <code>&lt;langmaterial&gt;</code> element, use to encode the language of the materials being described:</p> <p><i><code>&lt;langmaterial&gt;Diary entries written in &lt;language langcode="fre"&gt;French&lt;/language&gt;&lt;/langmaterial&gt;</code></i></p> <p><b>AAO templates will not contain the element in the <code>&lt;dsc&gt;</code>. Add the element, if desirable.</b></p>	4.5
<code>langcode="eng"</code>	Opt		<p>Use <a href="#">ISO 6392b</a> to determine correct language code.</p> <p><b>AAO templates will not contain this attribute. Add to element, if desirable.</b></p>	
Close <code>&lt;/did&gt;</code>				

<code>&lt;scopecontent&gt;</code>	Rec	N	<p>Particularly at the higher component levels, such as the recordgrp or series level, the scope and content note should provide a general description of the topical range and content, including notes on the document types and formats of the described materials at the higher component level. Biographical or administrative historical information may also be included in this element.</p> <p>Text should be enclosed in paragraph <code>&lt;p&gt;</code> tags <code>&lt;/p&gt;</code>. <code>&gt;</code>. If needed, the paragraph <code>&lt;p&gt;&lt;/p&gt;</code> tags are repeatable within the <code>&lt;scopecontent&gt;</code> element.</p>	3.1
<code>encodinganalog="520"</code>	Opt		<b>AAO templates will not contain this attribute. Add to element, if desirable.</b>	
<code>&lt;accessrestrict&gt;</code>	MA	N	<p>Use to record Information about conditions that affect the availability of the described materials being described. May indicate the need for an appointment or restrictions imposed by the donor, legal statue, repository, or other agency. Do not confuse with conditions governing use.</p> <p><b>AAO templates will not contain the element in the <code>&lt;dsc&gt;</code>. Add the element, if necessary.</b></p>	4.1; 4.2
<code>encodinganalog="506"</code>	Opt		<b>AAO templates will not contain this attribute. Add to element, if desirable.</b>	
<code>&lt;userrestrict&gt;</code>	Rec	N	<p>Use to record information about conditions that affect use of the described materials after access has been granted. Examples include limitations, regulations, or special procedures imposed by a repository, donor, legal statue, or other agency regarding reproduction, publication, or quotation of the described materials. May also indicate the absence of restrictions.</p> <p><b>AAO templates will not contain the element in the <code>&lt;dsc&gt;</code>. Add the element, if necessary.</b></p>	4.4
<code>encodinganalog="540"</code>	Opt		<b>AAO templates will not contain this attribute. Add to element, if desirable.</b>	



Table 4: Digital objects and external links

Elements and Attributes	Status	Repeatable?	Comments/Application Notes	DACS
<i>Elements are surrounded by angle brackets and rendered in boldface.</i>			Req=Required MA=Mandatory, if applicable Rec=Recommended by best practices guidelines Opt=Optional	
<b>Linking to external pointers or resources from a finding aid</b>				
<b>&lt;extptr&gt;</b>	Req	Y	If desired, link to external digital objects, such as your institutional logo using this element. The attribute values below dictate how the link is made. The pointers can link to an institution's web page.  Element will not be part of AAO template and should be added to guide by repository where appropriate.  <extptr linktype="simple" href="http://library.nau.edu/speccoll" title="NAU logo" actuate="onload" show="embed">	
linktype="simple"			Set attribute to "simple".	
href=			Provide the complete URL path in this attribute.	
title=			Provide title of external digital object element.	
actuate="onload"			Set attribute to "onload".	
show="embed"			Set attribute to "embed".	
<b>&lt;extref&gt;</b>	Req	Y	Use to link to external resources (i.e. other finding aids, web sites, online resources). Use the TITLE attribute to enter text to be used as a hyperlink to external resource.  Element will not be part of AAO template and should be added to guide by repository where appropriate.  <extref linktype="simple" href="http://www.harveyhouses.net/" title="Fred Harvey houses" role="text/html" actuate="onrequest" show="replace">	
linktype="simple"			Set attribute to "simple".	
href=			Provide the complete URL path in this attribute.	
actuate="onrequest"			Set attribute to "onrequest".	
role="text/html"			Set attribute to "text/html".	

show="replace new"			show="replace" (i.e., the linked resource will be displayed in the same browser window).  show="new" (i.e., the linked resource will be displayed in a new browser window).	
<b>Linking to digital object(s) from a finding aid</b>				
<b>&lt;daogrp&gt;</b>	<b>Req</b>	Y	Wrapper element for linking to digital objects from finding aid.	
linktype="extended"			Set attribute to "extended".	
<b>&lt;daodesc&gt;</b>	Rec		Use to supply information about the contents or source of the digital objects.  Text should be enclosed in paragraph <p> tags </p>. >. If needed, the paragraph <p></p> tags are repeatable within the <scopecontent> element.	
<b>&lt;resource&gt;</b>	<b>Req</b>	N	Mark up creates textual hyperlink: <b>&lt;resource label="start"&gt;image of Barry M. Goldwater&lt;/resource&gt;</b>  Empty element mark up creates a link from an icon/thumbnail/image: <b>&lt;resource label="start"/&gt;</b> or <b>&lt;resource label="start"&gt;&lt;/resource&gt;</b>  Not repeatable within the same <daogrp> element.	
linktype="resource"			Set attribute to "resource".	
label="start"			Set attribute to "start".	
<b>&lt;daoloc&gt;</b>	<b>Req</b>	Y	Element provides the location, type, title, and role of the digital object(s) in an extended link.  If a repository wishes to embed an image in a finding aid document and then provide a link to a larger version of the same image – use two <daoloc> elements and two <arc> elements with their attributes, such as in the following example:  <b>&lt;daoloc label="thumbnail" href="http://archive.library.nau.edu/leesferry_thumb.jpg" title="thumbnail image of Lees Ferry, 1967" role="image/jpeg"/&gt; &lt;daoloc label="reference" href="http:// archive.library.nau.edu/leesferry_full.jpg " title="reference image of Lees Ferry, 1967" role="image/jpeg"/&gt; &lt;arc from="start" to="thumbnail" show="embed" actuate="onload"/&gt; &lt;arc from="thumbnail" to="expanded" show="new" actuate="onrequest"/&gt;</b>	

href=			Use to provide the URL of each digital object.  <daoloc label="reference" href=" http://archive.library.nau.edu/u/?cpa,16123" title="image of dog at Grand Canyon, ca. 1950" role="image/jpeg"/>	
label="thumbnail reference hi-res"			Use to identify if digital object is a thumbnail, reference, or high resolution file.  <daoloc label="reference" href=" http://archive.library.nau.edu/u/?cpa,16123" title="image of dog at Grand Canyon, ca. 1950" role="image/jpeg"/>	
title=			Use to provide the title of each digital object.  <daoloc label="reference" href=" http://archive.library.nau.edu/u/?cpa,16123" title="image of dog at Grand Canyon, ca. 1950" role="image/jpeg"/>	
role="image/gif image/jpeg image/tif"			Use to identify the mimetype of the digital object being used in the <daoloc> element.  <daoloc label="reference" href=" http://archive.library.nau.edu/u/?cpa,16123" title="image of dog at Grand Canyon, ca. 1950" role="image/jpeg"/>	
<arc>	Req	Y	Specifies the rules for traversal among the participating resources in an extended link. Arc uses the attributes to and from to define the traversal between named pairs of resources.	
from=			Set the attribute FROM to the identical value as the <resource> attribute LABEL (i.e. <resource label="start">). If the <arc> will be referring to a thumbnail as the beginning of an extended link, assign the FROM attribute to thumbnail (i.e. <resource label="thumbnail">). Here are two examples of uses of the FROM attribute (also see discussion within <daoloc> element:  <arc from="start" to="thumbnail" show="embed" actuate="onload"/>  <arc from="thumbnail" to="expanded" show="new" actuate="onrequest"/>	
to=			Use the attribute TO to define the destination of the extended link. Assigning the attribute TO to the value "expanded" will point to a different resource. Here are two examples of the use of the TO attribute:  <arc from="start" to="thumbnail" show="embed" actuate="onload"/>  <arc from="thumbnail" to="expanded" show="new" actuate="onrequest"/>	
show=			Use the attribute SHOW to define when the digital object will be embedded in the guide upon loading or replace/open a new resource upon request.	

			<p>Embed digital object in guide:  <code>&lt;arc from="start" to="thumbnail" <b>show="embed"</b> actuate="onload"/&gt;</code></p> <p>Request (replace existing browser page)  <code>&lt;arc from="thumbnail" to="expanded" <b>show="replace"</b> actuate="onrequest"/&gt;</code></p> <p>Request (open new browser page)  <code>&lt;arc from="thumbnail" to="expanded" <b>show="new"</b> actuate="onrequest"/&gt;</code></p>	
actuate=			<p>Use the attribute ACTUATE to define behavior of when to activate extended link.</p> <p>Activate when loading guide:  <code>&lt;arc from="start" to="thumbnail" show="embed" <b>actuate="onload"</b>/&gt;</code></p> <p>Activate when extended link is clicked:  <code>&lt;arc from="thumbnail" to="expanded" show="new" <b>actuate="onrequest"</b>/&gt;</code></p>	

## Appendix: Sample of finding aid based on AAO Best Practices

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          <addressline>Tucson, AZ 85721-0026</addressline>
          <addressline>Phone: 520-621-2970</addressline>
          <addressline>Fax: 520-621-2976</addressline>
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      activities with the Tucson Festival Society and Pascua Yaqui Association. Also
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<p>The Arizona State Museum may not own copyright to all parts of this collection. It is the responsibility of the user to obtain permission to publish from the owner of the copyright (the institution, the creator of the record, the author or his/her transferees, heirs, legates, or literary executors). The user agrees to indemnify and hold harmless the Arizona Board of Regents for the University of Arizona, Arizona State Museum, its officers, employees, and agents from and against all claims made by any person asserting that he or she is an owner of copyright.</p>

</userrestrict>

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<p>The Painter Collection came to the Arizona State Museum at Muriel Thayer Painter's death in 1975 except for several drafts of her Yaqui manuscript, which were at the University of Arizona Press or in the Spicer residence. These drafts were given to the Archives by Mrs. Spicer in 1987.</p>

</custodhist>

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<p>Muriel Thayer Painter Collection. Arizona State Museum Archives. Ms18.</p>

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<head>Biographical Note</head>

<p>Muriel Thayer was born in Minneapolis in 1892. She attended University of Minnesota and graduated from Wellesley in 1916 with a degree in social work. During 1938-39, Bronislaw Malinowski was a guest lecturer at the University of Arizona, Department of Anthropology. Muriel Thayer Painter joined Malinowski in observing the Yaqui Easter ceremony in Spring, 1939.</p>

<p>From the beginning, Muriel Painter's commitment to study the Easter ceremony, and eventually the entire ceremonial cycle, grew. Each year from 1939 through 1954 she attended most of the Holy Week observances and the processions during Lent. Her extensive notes documenting these observations were supplemented by interviews with Yaquis over a period of years from 1948 to 1975. Mrs. Painter was appointed chairperson of the Tucson Chamber of Commerce "Yaqui Committee" in 1942. In 1950, the Tucson Chamber of Commerce published her pamphlet on the Yaqui Easter Ceremony at Pascua, which was later updated and reprinted by the University of Arizona Press.</p>

<p>Since 1944, Muriel Painter was a research associate at the Arizona State Museum. She was program chairperson for the Tucson Festival Society which began organizing the annual San Xavier Fiesta in 1952. During the 1960s, she was chairperson of the Pascua Yaqui Association which sought to improve housing in Pascua Pueblo. The work

of this Association eventually gained recognition of the Yaquis as a tribe and funds for establishing New Pascua Pueblo.</p>

<p>When she died in 1975, Muriel Painter left her papers, including her unpublished manuscript, to the Arizona State Museum. Dr. Edward Spicer of the Department of Anthropology and Wilma Kaemlein, emeritus staff member of ASM, revised the manuscript and in 1986 it was published as <emph render="italic">With Good Heart</emph> by the University of Arizona Press.</p>

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<p>This collection is organized into four subgroups and 15 series</p>

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<item>Series 2: Pascua Field Notes by Subject and Miscellaneous Reading Notes </item>

<item>Series 3: Papago (O'odham) Field Notes </item>

<item>Series 4: Notes on Mexico and Miscellaneous </item>

<item>Subgroup 2: Publications </item>

<item>Series 1: Various Small Publications </item>

<item>Series 2: Yaqui Manuscript Research </item>

<item>Series 3: <emph render="italic">With Good Heart</emph>, First Draft </item>

<item>Series 4: <emph render="italic">With Good Heart</emph>, Second Draft </item>

<item>Series 5: <emph render="italic">With Good Heart</emph>, Final Draft </item>

<item>Subgroup 3: Refugio Savala Papers </item>

<item>Series 1: Original Savala Manuscripts </item>

<item>Series 2: Savala Manuscript Edited by Kay Sands </item>

<item>Subgroup 4: Community and Professional Activities </item>

<item>Series 1: Correspondence </item>

<item>Series 2: Tucson Festival Society </item>

<item>Series 3: Pascua Yaqui Development Project </item>

<item>Series 4: Other Activities </item>

</list>

</arrangement>

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<p>This collection relates to the years from 1939 to 1975 when Muriel Painter was active in the Pascua Yaqui community. Her papers include field notes on Pascua and San Xavier and materials relating to her community activities with the Tucson Festival Society and Pascua Yaqui Association.</p>



<p>Subgroup 1 is field notes, 1939-71; subgroup 2 is publication; subgroup 3 is the Refugio Savala papers; and subgroup 4 is community and professional activities.</p>

<p>Refugio Savala's manuscripts for <emph render="italic">Autobiography of a Yaqui Poet</emph> and other Savala papers are included in the Painter Collection because he was an important Yaqui contributor to her work. Mrs. Painter encouraged Refugio to start his autobiographical journal describing Yaqui customs as they were in his lifetime.</p>

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  <did>
    <container type="box">3</container>
    <container type="folder">50</container>
    <unittitle>Barrio Libre</unittitle>
  </did>
</c03>
<c03 level="file">
  <did>
    <container type="box">3</container>
    <container type="folder">51</container>
```

```
<unittitle>Notes on Refugio Savala</unittitle>
</did>
</c03>
</c02>
.....[rest of container list]
</c01>
</dsc>
</archdesc>
</ead>
```

## **Bibliography**

The best practices committee found the Encoded Archival Description (EAD) Version 2002 Official site maintained by the Library of Congress extremely useful when determining the application of specific EAD elements.

**[Library of Congress. Encoded Archival Description Version 2002 Official Site](#)**

The revised Arizona Archives Online best practices (version 3.1) were guided and vastly improved by consulting the following consortia EAD best practices documentation:

**[Northwest Digital Archives. Best Practice Guidelines for Encoded Archival Description \(version 3.3\)](#)**

**[Online Archive of California. Best Practice Guidelines for EAD \(version 2.0\)](#)**

**[Utah Manuscript Association. Encoded Archival Description Best Practices Guidelines \(version 1.2\)](#)**

When entering archival descriptive information above the <dsc> section of a finding aid, Archive Archives Online contributors should refer to the rules and conventions illustrated in **[Describing Archives: a Content Standard](#)**.