

# TARO 2.0: A guide to preparing for Finding Aid Migration

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TARO 2.0 development is well underway and the features we called for in our grant proposal require that we make some updates to the TARO finding aids as we prepare to migrate them to the new system. The developers and the Steering Committee are working on a variety of tools and assistance that should help with that process. One of those tools is a migration error checker that will identify issues with finding aids that need to be addressed as they are being prepared for migration. An ad hoc migration committee has been formed by the Steering Committee to coordinate guidance for those repositories that may require help.

This guide is intended to give information about the error checking tool, what it is looking for and how the issues it finds can be addressed.

**The importance of the Minimum Viable Product (MVP) requirements and the tool we will use to ensure they are in your finding aids.** The MVP is a document with specifications about the features and updates to TARO that are part of the TARO 2.0 project. See this [blog entry](#) to learn about TARO 2.0 development in general.

1. TARO 2.0 website requirements are largely based on the requirements described in the [TARO Best Practice Guidelines Version 3.0](#) created during the NEH planning grant. The best practice guidelines have been public since 2017 and serve as a ready-made tool to answer potential questions from repositories who may wonder the source of requirements.
2. It is the nature of data migrations from one system to another that data will need to be edited/cleaned up to meet requirements of a new system (i.e. TARO 2.0 website in this case).

3. Considering TARO's involvement in national initiatives like the [National Archival Finding Aid Network \(NAFAN\)](#), our finding aid data needs to be consistent at least within the TARO site.
4. Requirements are tied to website functionalities laid out in the NEH grant application and we need to meet our commitments per the grant.
5. TARO 2.0 element requirements are important to avoid creating or recreating inequity in the new website. Understandably there is concern that smaller repositories will need some guidance and support in this transition but it's better to help them now if we can rather than wait indefinitely and allow the data cleanup debt to continue to grow.
6. Migration preparation counts toward the cost share for the NEH grant. TARO 2.0 migration preparation work can be entered in the [NEH grant finding aid tracking spreadsheet](#).

Below, some elements are noted as Required or with Warning (preferred). The elements that will be Required are those fields that appear in the Collection Overview/Descriptive Summary sections of finding aids and/or are tied to MVP requirements.

*Please see the EAD Schema template that was created as part of the BPG if you have other questions about the elements that the migration will call for:*

<http://texastaro.pbworks.com/w/file/fetch/118104417/TARO-files-schema.zip>

## Timeline:

Beginning of TARO 2.0 Remediation Project	December 2020
Encodinganalog Addition Script	December 9, 2020
Migration error report refresh	February 3, 2021
Migration error report refresh	March 3, 2021
Migration error report refresh	April 7, 2021
Migration error report refresh	May 5, 2021
Soft launch of TARO 2.0 site (includes test migrations)	May 18, 2021
Legacy TARO processing freeze	September 1, 2021
End of TARO 2.0 Remediation Project	September 15, 2021

## Finding Aid Editing Tools

Oxygen (<https://www.oxygenxml.com/>)

Sublime (shareware)  
(<https://www.sublimetext.com/>)

### Other free options:

Notepad++ (<https://notepad-plus-plus.org/download/v7.7.html>)

Microsoft XML Notepad (<https://www.microsoft.com/en-us/download/details.aspx?id=7973>)

TextEdit (<https://softfamous.com/textedit/>)

## Error Checking After Editing

To resolve errors on files that you are editing, there will be access to a test ("qual"\*) environment.

### How to access test environment

- See the [instructions](#) for how to access the test/qual environment.
- Login information can be found [here](#). Please note that the link will expire in 1 month and it can reset as needed. **Note: Write down your login information to keep in a safe place!**

If you encounter an error message like the images shown below, send them to [C.Alvarez@austin.utexas.edu](mailto:C.Alvarez@austin.utexas.edu) so that she can share them with the website programmers.

Include this information with your message:

- Image of the error message
- XML file that caused error

## Errors discovered thus far during remediation testing:

**OVERALL:** Preferred errors will not show up until all Required errors are resolved. Users can expect to receive Preferred errors even after they've cleaned up all the Required.

**Note:** while these are common errors, an element-by-element and attribute-by-attribute list of potential changes can be found in the next section, [EAD Elements](#).

### <descgrp>

The <descgrp> wrapper tag can ONLY wrap around elements as defined in the Best Practice Guide. Those are acqinfo, processinfo, and prefercite. If <descgrp> surrounds any others, the script will create a unique error message *very* different from the “Required” or “Warning” errors.

Also, the <descgrp> tag can only occur once. An error will occur when there are multiple instances of the tag.

## Preferred errors not appearing in error checker

*You will not receive a ‘Warning’ error message (black text) until all Required (red text) errors are resolved.* After Required errors are resolved, a Preferred error message like the one below can appear:

- 00001.xml: Missing acqinfo, processinfo and/or prefercite tags in archdesc or descgrp tags.

### <scopecontent>

- 00001.xml: Incorrect attribute on scopecontent, should be 520\$b

This wants you to change the @encodinganalog attribute value to 520\$b. Often, the attribute is present, but does not contain the \$b.

## <author>

There is only one <author> tag viewed by the script, and it is in <titlestmt>. This error message will appear if the tag is not present, BUT ALSO if the tag contains **no free text**. It is not enough for just an empty tag to be present.

- 00001.xml: Missing author when trying to find the author.

## <publicationstmt>

Will receive Required errors if it is not present

- 00001.xml: Missing publicationstmt when trying to find the publisher.
- 00001.xml: Missing publicationstmt when trying to find the date.

Once it is present, if none of its child elements are present, then you will receive a new VALIDATION (not Compliance) error.

- 00001.xml: Does not pass EAD validation: Element '{urn:isbn:1-931666-22-9}publicationstmt': Missing child element(s). Expected is one of ( {urn:isbn:1-931666-22-9}publisher, {urn:isbn:1-931666-22-9}date, {urn:isbn:1-931666-22-9}address, {urn:isbn:1-931666-22-9}num, {urn:isbn:1-931666-22-9}p ), line 18

Once <publisher> OR <date> OR <address> (which requires at least one instance of child element <addressline> to validate) OR <num>, or any combination of those, are present, then the file will both Validate and Comply. This is true whether or not free text is present between any of these tags.

## <physdesc><extent>

<physdesc label="Extent:" encodinganalog="300"> is not sufficient to account for extent. The script is looking for the <extent> tag, which should appear between the <physdesc> tags.

Also, the error checker checks for a free text value between the <extent> tags. Free text **MUST** be present.

## **<persname> controlaccess vs. <persname> (or corpname or famname) origination**

If <origination>'s persname (or other) tag is not present, the Required error is:

- 00001.xml: Missing one of the following tag when looking for creator: persname, corpname, famname.

However: if @encodinganalog and @source attributes are missing in either <origination> or <controlaccess> tags, THE ERROR MESSAGES ARE THE SAME. Users cannot distinguish between the two without reviewing both <origination> and <controlaccess> in their finding aid.

## **<persname> (or corpname or famname -) in <origination>**

If present, but missing @encodinganalog and/or @source:

- 00001.xml: Missing attributes on persname, should have @encodinganalog.
- 00001.xml: Missing attributes on persname, should have @source.

If @source is present, but contains no value, then the file will not *Validate*, meaning that users will receive the validation error (described on page 45 of this guide.) This is because attributes in XML that contain no text are always invalid.

If @encodinganalog is present, but contains no numerical value, it also might not Validate. At the very least, it will provide the below error:

- 00001.xml: Incorrect attribute on persname, should be 100

**Note:** this does not point out that this is @encodinganalog value, but that is what it is looking for.

Also, if @encodinganalog is present and contains a value, the script will compare famname/persname/corpname for the @encodinganalog value that it should contain (100 for famname/persname, or 110 for corpname) and inform the user if it should be changed.

Finally, if the @source value (lcsh, local, etc.) is not present, the error below will appear. It must be identified by the archive and entered by hand.

- 00001.xml: Missing the source attribute on persname.

## **<persname> controlaccess**

<persname> or other controlaccess tag (i.e. geogname, subject, corpname) does not require any free text within it. A blank tag can exist (although it shouldn't) and will pass the error checker.

When missing encodinganalog or source, the following Required errors can occur:

- 00001.xml: Missing attributes on persname, should have @encodinganalog.
- 00001.xml: Missing attributes on persname, should have @source

If @source is present, but contains no value, then the file will not *Validate*, meaning that users will receive the validation error (described on page 45 of this guide.) This is because attributes in XML that contain no text are always invalid.

If @encodinganalog is present, but contains no value, it may not Validate. At the very least, it will provide the error below:

- 00001.xml: Incorrect attribute on persname, should include ('600', '700')

Note: <controlaccess> revisions at large are part of a larger, ongoing project to help repositories update their subject headings. Details of that work will be provided during Summer 2021.

## **<head> (archdesc > did > head)**

When <head> is not present:

- 00001.xml: Missing head when trying to find the head.

When present, it requires free text to be present, but provides the same error message:

- 00001.xml: Missing head when trying to find the head.

Recommended free text is "Collection Summary" if at all possible.

## **<unitid>**

- 00001.xml: Incorrect attribute on unitid, should be US-txltsw

This is a common error (14,000 finding aids), and must be corrected by hand, most likely via find/replace, in each repository.

### <unitdate>

Repositories with finding aids from the early 2000s may have unitdate inside of <unittitle> (in the <archdesc> section, not in the <dsc> or “inventory” section of the finding aid). This must be corrected.

## EAD Elements

The section that follows details Required and Preferred EAD elements that will impact the migration of finding aids to TARO 2.0. Each section will provide information on the element, its designation (Required or Preferred), that element's required attributes and values, and common issues that have been identified in the initial finding aid migration error check. EAD encoding examples in multiple environments are also provided.

***Please Note: Elements and attributes may not appear in existing XML files in the order provided below. The examples are real world examples and may contain required and preferred elements and attributes.***

### Click Element to Navigate

[eadheader](#) - [eadid](#) - [titleproper](#) - [author](#) - [sponsor](#) - [publisher](#) - [date](#) - [head](#) - [repository](#) - [extref](#) - [creator](#) - [unittitle](#) - [unitdate](#) - [unitid](#) - [abstract](#) - [physdesc](#) - [extent](#) - [language](#) - [bioghist](#) - [scopecontent](#) - [arrangement](#) - [accessrestrict](#) - [userrestrict](#) - [relatedmaterial](#) - [prefercite](#) - [acqinfo](#) - [processinfo](#) - [altformavail](#) - [separatedmaterial](#) - [dsc](#) - [controlaccess](#)



## eadheader:

EAD Tag	Status	Tag Location	Required Child Element
<eadheader>	Required	eadheader	eadid

EAD Tag	Attribute	Value
<eadheader>	langencoding	iso639-2b
<eadheader>	audience	internal
<eadheader>	repositoryencoding	iso15511
<eadheader>	countryencoding	iso3166-1
<eadheader>	scriptencoding	iso15924
<eadheader>	dateencoding	internal

### What Does the Best Practice Guidelines Say:

Wrapper element for information about the finding aid document, rather than the archival materials being described in the bulk of the finding aid.

### Examples:

1:

```
<eadheader langencoding="iso639-2b" audience="internal" countryencoding="iso3166-1"
dateencoding="iso8601" repositoryencoding="iso15511" scriptencoding="iso15924"
relatedencoding="MARC21">
```

2:

```
<eadheader langencoding="iso639-2b" audience="internal" countryencoding="iso3166-1"
dateencoding="iso8601" repositoryencoding="iso15511" scriptencoding="iso15924">
```

## Common Issues

If using a template, ensure that it meets current TARO standards and the <eadheader> tag is nested in the proper place.

### Purpose:

This is a valuable element in EAD that TARO has determined is required to meet community standards.

### eadid:

EAD Tag	Status	Tag Location	Required Child Element
<eadid>	Required	eadheader > eadid	

EAD Tag	Attribute	Value0
<eadid>	encodinganalog	856\$u
<eadid>	countrycode	US
<eadid>	mainagencycode	

### What Does the Best Practice Guidelines Say:

urn:taro:[TARO username].[file name] Encode your repository's TARO username. Encode the file name for the finding aid as a five-digit number assigned as a unique sequential file name within your repository.

## Examples

1:

```
<eadid encodinganalog="856$u" mainagencycode="US-txdtuna"
countrycode="US">urn:taro:unt.00026</eadid>
```

2:

```
<eadid mainagencycode="US-txau" countrycode="US">urn:taro:aushc.00423</eadid>
```

## Common Issues:

The value is not formatted correctly as instructed here:

<https://legacy.lib.utexas.edu/taro/admin/howdoi/namefiles.html>

- Two possible formats:
  - o urn:taro:[institution].[unit].[xxxxx]
  - o urn:taro:[institution].[xxxxx]

The message “Incorrectly formatted taro identifier field: Does not match file name” if the file name does not match the 5 digit assigned id required by TARO.

The **mainagencycode** can be found among Library of Congress library IDs on this site:

<https://www.loc.gov/marc/organizations/org-search.php>

## Purpose:

This <eadid> format requirement has been around since the beginning of TARO but requires enforcement from TARO members. The urn in eadid (which is validation, not compliance, related) is the only way for finding aids to show up on taro as it creates the URL on the site.

## titleproper:

EAD Tag	Status	Tag Location	Required Child Element
<titleproper>	Required	eadheader > filedesc > titlestmt > titleproper	

## What Does the Best Practice Guidelines Say:

Encode the formal title of the finding aid itself and not the title of the fonds or record group being described. This will be used to display the title of the finding aid and for fielded searching via a dc.title HTML metatag.

### Examples:

1.

`<titleproper>`Guide to the The Black Academy of Arts and Letters Records`</titleproper>`

### Purpose:

This element will be used for sort and filter simple and advanced search results by title; browse pages; and for Dublin Core (DC) mapping.

## author:

EAD Tag	Status	Tag Location	Required Child Element
<code>&lt;author&gt;</code>	Preferred*	filedesc > titlestmt > author	

*\*Will be treated as Warning*

## What Does the Best Practice Guidelines Say:

Encode the name of the person(s) or institution(s) responsible for the intellectual content of the encoded finding aid.

### Examples:

1:

`<filedesc>`

```

<titlestmt>
<titleproper>Guide to the Donald Chipman Papers</titleproper>
  <author>Finding Aid Authors: Perri Hamilton.</author>
</titlestmt>

```

2:

```

<filedesc>
  <titlestmt>
    <titleproper>Leonard Eck Papers</titleproper>
    <subtitle>An Inventory of the Collection</subtitle>
    <author>Finding aid prepared by Molly Hults.</author>
  </titlestmt>

```

### Common Issues:

If using a template, ensure that it meets current TARO standards and the <author> tag is nested in the proper place.

### Purpose:

This is a valuable element in EAD that TARO has determined is preferred to meet community standards.

### sponsor:

EAD Tag	Status	Tag Location	Required Child Element
<sponsor>	Preferred*	filedesc > titlestmt > sponsor	

*\*Will be treated as Warning*

EAD Tag	Attribute	Value
<sponsor>	encodinganalog	536

## What Does the Best Practice Guidelines Say:

Encode a statement acknowledging a donor or granting organization whose financial support helped to create the finding aid. Or, may use a generic statement such as, "This EAD finding aid was created in cooperation with Texas Archival Resources Online."

### Examples

1:

```
<titlestmt>
  <titleproper>Texas School for the Blind and Visually Impaired:</titleproper>
  <subtitle>An Inventory of School for the Blind and Visually Impaired Meeting Files at the
Texas State Archives</subtitle>
  <author>Finding aid by Tony Black and Anna M. Reznik</author>
  <sponsor encodinganalog="536$a">This EAD finding aid was created in cooperation with
Texas Archival Resources Online.</sponsor>
</titlestmt>
```

2:

### Common Issues:

If using a template, ensure that it meets current TARO standards and the <sponsor> tag is nested in the proper place.

### Purpose:

This is a valuable element in EAD that TARO has determined is preferred to meet community standards.

## **publisher:**

EAD Tag	Status	Tag Location	Required Child Element
<publisher>	Preferred*	filedesc > publicationstmt > publisher	

*\*Will be treated as Warning*

## What Does the Best Practice Guidelines Say:

Encode the name of your repository.

### Examples:

1:

```
<publicationstmt>
  <p>Copyright 2014 University of North Texas Special Collections. All rights reserved.</p>
  <date encodinganalog="260$c" type="publication" era="ce" calendar="gregorian"
normal="2014-03-24">2014-03-24</date>

  <address>
    <addressline>University of North Texas, Willis Library</addressline>
    <addressline>1155 Union Circle # 305190</addressline>
    <addressline>Denton, TX, 76203</addressline>
    <addressline>URL: https://library.unt.edu/special-collections/</addressline>
  </address>

</publicationstmt>
```

2:

```
<publicationstmt>
  <publisher>Austin History Center, Austin Public Library</publisher>
  <date calendar="gregorian" era="ce" normal="2014-06-18">June 18, 2014</date>
  <address>
    <addressline>810 Guadalupe</addressline>
    <addressline>PO BOX 2287</addressline>
    <addressline>Austin, TX 78768</addressline>
  </address>
</publicationstmt>
```

## Common Issues:

If using a template, ensure that it meets current TARO standards and the <publisher> tag is nested in the proper place.

## Purpose:

This is a valuable element in EAD that TARO has determined is preferred to meet community standards.

## date:

EAD Tag	Status	Tag Location	Required Child Element
<date>	Preferred*	filedesc > publicationstmt > date	

*\*Will be treated as Warning*

EAD Tag	Attribute	Value
<date>	era	ce
<date>	calendar	gregorian
<date>	normal	YYYY-MM-DD

## What Does the Best Practice Guidelines Say:

Encode the date of the initial encoding into EAD.

## Examples:

1:

<date calendar="gregorian" era="ce" normal="2020-11-05">November 5th, 2020</date>



2:

`<date calendar="gregorian" era="ce" normal="2014-06-18">June 18, 2014</date>`

## Common Issues:

Make sure that if you are using an EAD template for the creation of finding aids that they are current and that the `<publicationstmt>` and `<date>` and `<publisher>` child elements if formatted correctly.

XML snippet -

```
...
<publicationstmt>
    <publisher><!-- Enter name of your repository --></publisher>
    <date era="ce" calendar="gregorian"><!-- Encode the date the finding aid was published
(i.e. added to TARO server) --></date>
</publicationstmt>
```

## Purpose:

This is a valuable element in EAD that TARO has determined is preferred to meet community standards.

## head:

EAD Tag	Status	Tag Location	Required Child Element
<code>&lt;head&gt;</code>	Required	archdesc > did > head	

## What Does the Best Practice Guidelines Say:

It is recommended to use "Collection Summary" in the `<head>` element.

## Examples

1:

```
<archdesc level="collection" type="inventory" audience="external">
  <did>
    <head>Overview of the Collection</head>
```

2:

```
<archdesc level="collection" type="inventory" audience="external">
  <did>
    <head>Collection Summary</head>
```

## Common Issues:

The <head> tag does allow for a free text value to accommodate other repositories with different missions. The TARO EAD template (shown below) uses “Collection Summary” and it is highly encouraged for uniformity amongst TARO finding aids.

XML snippet -

```
...
<archdesc level="collection" type="inventory" audience="external">
  <did>
    <head>Collection Summary</head>
    <!-- Alternate: <head>Descriptive Summary</head> -->
  ...
```

## Purpose:

The <head> with label “Collection Overview”/”Descriptive Summary” is required because this is the first section of the table of contents. The Minimum Viable Product (MVP) document has the following requirement:

- Finding aid Display: Sticky Table of Contents

## repository:

EAD Tag	Status	Tag Location	Required Child Element
---------	--------	--------------	------------------------

<b>&lt;repository&gt;</b>	Required	archdesc > did > repository	None
---------------------------	----------	--------------------------------	------

EAD Tag	Attribute	Value
<b>&lt;repository&gt;</b>	label	Repository:
<b>&lt;repository&gt;</b>	encodinganalog	852\$a

## What Does the Best Practice Guidelines Say:

Wrapper for the institution or agency responsible for providing intellectual access to the materials being described.

### Examples:

1:

```
<repository encodinganalog="852$a" label="Repository">
  <extref xmlns:xlink="http://www.w3.org/1999/xlink" xlink:type="simple"
    xlink:show="new" xlink:actuate="onRequest"
    xlink:href="https://library.unt.edu/special-collections/">
    <corpname>University of North Texas Special Collections</corpname></extref>
  <address>
    <addressline>University of North Texas, Willis Library</addressline>
    <addressline>1155 Union Circle # 305190</addressline>
    <addressline>Denton, TX, </addressline>
  </address>
</repository>
```

2:

```
<repository label="Repository:" encodinganalog="852$a">
  <extref xmlns:xlink="http://www.w3.org/1999/xlink" xlink:type="simple" xlink:show="new"
    xlink:actuate="onRequest" xlink:href="http://library.austintexas.gov/ahc/about-us">
    <corpname><subarea>Austin History Center</subarea>, Austin Public
    Library</corpname>
  </extref>, <address>
    <addressline>810 Guadalupe, PO Box 2287, Austin, TX 78768</addressline>
```

</address>  
</repository>

## Common Issues:

Some errors may be caused because of missing attributes (e.g. @encodinganalog)

## Purpose:

The Minimum Viable Product (MVP) document has the following requirements:

- Ability to filter simple and advanced results by: Creator, Date, Language, **Repository**
- Ability to sort simple and advanced results by: Creator, Title, Date, **Repository**

## extref:

EAD Tag	Status	Tag Location	Required Child Element
<extref>	Required	archdesc > did > repository > extref	

EAD Tag	Attribute	Value
<extref>	xmlns:xlink	http://www.w3.org/1999/xlink
<extref>	xlink:type	simple
<extref>	xlink:show	new
<extref>	xlink:actuate	onRequest
<extref>	xlink:href	Link to repository

## What Does the Best Practice Guidelines Say:

Enter the URL for the repository web page that users should be directed to for more information about the repository.

### Examples:

1:

```
<repository encodinganalog="852$a" label="Repository">
<extref xmlns:xlink="http://www.w3.org/1999/xlink" xlink:type="simple" xlink:show="new"
xlink:actuate="onRequest" xlink:href="https://library.unt.edu/special-collections/">
<corpname>University of North Texas Special Collections</corpname></extref>
```

2:

```
<repository label="Repository:" encodinganalog="852$a">
  <extref xmlns:xlink="http://www.w3.org/1999/xlink" xlink:type="simple" xlink:show="new"
    xlink:actuate="onRequest" xlink:href="http://library.austintexas.gov/ahc/about-us">
    <corpname><subarea>Austin History Center</subarea>, Austin Public
Library</corpname>
  </extref>
```

### Common Issues:

Ensure that all extref tags are properly closed as shown below.

```
<repository label="Repository:" encodinganalog="852$a">
  <extref xmlns:xlink="http://www.w3.org/1999/xlink" xlink:type="simple" xlink:show="new"
    xlink:actuate="onRequest" xlink:href="http://www...">
```

### Purpose:

New TARO members are required to provide a proof of online presence and will apply to all repositories in the TARO 2.0 site (see requirements here:

<http://sites.utexas.edu/taro/about-taro/how-to-join/>). It would create an uneven user experience if some repositories didn't include this information.

### creator:

EAD Tag	Status	Tag Location	Required Child Element
<origination>	Required	archdesc>did>origination>	<persname> <famname> <corpname>

EAD Tag	Attribute	Value
<origination>	label	Creator:
<persname> <famname>	source	lcnaf viaf local  (Value can be a number of sources. See BPG 11-15)
<persname> <famname>	encodinganalog	100
<corpname>	source	lcnaf viaf local  (Value can be a number of sources. See BPG 11-15)
<corpname>	encodinganalog	110

### What Does the Best Practice Guidelines Say:

One of the child elements <persname>, <famname>, <corpname> is required. If the creator is unknown TARO suggests using "Unknown" with the encoding analog "100"; source set to "local".

## Examples:

1.

```
<origination label="Creator" encodinganalog="245$c">  
    <corpname encodinganalog="110" normal="The Black Academy of Arts and Letters"  
source="local" role="Collector">The Black Academy of Arts and Letters</corpname>  
    <persname encodinganalog="100" normal="Curtis L. King" source="local"  
role="Collector">Curtis L. King</persname>  
</origination>
```

2.

```
<origination label="Creator:">  
    <persname source="local" encodinganalog="100">Eck, Leonard</persname>  
</origination>
```

## Common Issues

A reminder that even if a creator is listed there can be errors if attributes are missing.

The compliance script will not distinguish in its error message for the child elements <persname>, <famname>, and <corpname> if the error occurs in the <origination> or <controlaccess>

If the creator is unknown TARO suggests using "Unknown" with the encoding analog "100"; source set to "local". "No attribution" is a more gentle way to say that the creator is unknown, particularly if repositories have internal policies that prevent them from listing their repository as the creator (<corpname> with @role="collector").

## Purpose:

This element will be used to sort simple and advanced search results by creator; browse by creator; and for Dublin Core (DC) mapping.

The Minimum Viable Product (MVP) document has the following requirements:

- Ability to filter simple and advanced results by: Creator, Date, Language, Repository

- Ability to sort simple and advanced results by: Creator, Title, Date, Repository

We need to have a default value, such as "Unknown", because TARO 2.0 users will be able to Search and Browse by Creator and Repository.

## unittitle:

EAD Tag	Status	Tag Location	Required Child Element
<b>&lt;unittitle&gt;</b>	Required	archdesc > did > unittitle	

EAD Tag	Attribute	Value
<b>&lt;unittitle&gt;</b>	label	Title:
<b>&lt;unittitle&gt;</b>	encodinganalog	245

## What Does the Best Practice Guidelines Say:

Encode the collection title, formulated according to DACS 2.3. Use one <unittitle> tag.

## Examples:

1:

```
<unittitle label="Collection Title" encodinganalog="245$a">Donald Chipman Papers
</unittitle>
```

2:

```
<unittitle label="Title:" encodinganalog="245$a">Leonard Eck Papers</unittitle>
```



## Common Issues:

In older finding aids <unitdate> may be found inside <unittitle>, which could produce an error of missing unitdate in the compliance script. Repositories can copy and paste the <unitdate> outside of the <unittitle> element to resolve the error.

## Purpose:

This element will be part of a set of elements that are required to have consistent data for a subset/portion of all finding aids in TARO.

## unitdate:

EAD Tag	Status	Tag Location	Required Child Element
<unitdate>	Required	archdesc > did > repository > extref	

EAD Tag	Attribute	Value
<unitdate>	label	Dates:
<unitdate>	encodinganalog	245\$f
<unitdate>	type	inclusive bulk
<unitdate>	era	ce
<unitdate>	calendar	gregorian
<unitdate>	normal	YYYY-MM-DD

## What Does the Best Practice Guidelines Say:

Use at least one tag for single or inclusive dates for the collection. Repeat the tag if both inclusive and bulk dates are given. Encode outside of <unittitle>.

### Examples:

1:

```
<unittitle label="Collection Title" encodinganalog="245$a">Donald Chipman Papers</unittitle>  
<unitdate label="Dates" encodinganalog="245$f" type="inclusive" normal="1961/1970"  
era="ce" calendar="gregorian">1961-1970</unitdate>
```

2:

```
<unittitle label="Title:" encodinganalog="245$a">Leonard Eck Papers</unittitle>
```

```
<unitdate label="Inclusive Dates:" type="inclusive" encodinganalog="245$f"  
normal="1882/1949" era="ce" calendar="gregorian">1882-1949</unitdate>
```

```
<unitdate label="Bulk Dates:" type="bulk" encodinganalog="245$g" normal="1882/1914"  
era="ce" calendar="gregorian">1882-1914</unitdate>
```

### Common Issues:

@era, @calendar, @type and @normal attributes are needed for <unitdate> (in the higher level <did> where collection dates are entered). See examples below:

```
<unitdate label="Dates:" type="inclusive" encodinganalog="245$f" normal="1959/2011"  
era="ce" calendar="gregorian">1959-2011, </unitdate>  
<unitdate label="Dates:" type="inclusive" encodinganalog="245$f" normal="2019" era="ce"  
calendar="gregorian">2019</unitdate>
```

```
<unitdate label="Dates:" type="inclusive" encodinganalog="245$f" normal="1991/2018"  
era="ce" calendar="gregorian">1991-2018</unitdate>  
<unitdate label="Dates (Bulk):" type="bulk" encodinganalog="245$g" normal="1991/2008"  
era="ce" calendar="gregorian">1991-2008</unitdate>
```

The attributes used in <unitdate> are very important because that's how we ensure that dates are machine readable. There are MVP requirements to allow sort and filter of simple and advanced search results by date. Again, this refers to the collection dates entered in the collection overview section not dates in the inventory section.

### Purpose:

The Minimum Viable Product (MVP) document has the following requirements:

- Ability to filter simple and advanced results by: Creator, **Date**, Language, Repository
- Ability to sort simple and advanced results by: Creator, Title, **Date**, Repository

### unitid:

EAD Tag	Status	Tag Location	Required Child Element
<unitid>	Required		

EAD Tag	Attribute	Value
<unitid>	label	Identification
<unitid>	countrycode	US
<unitid>	repositorycode	US-XXXX
<unitid>	encodinganalog	099

### What Does the Best Practice Guidelines Say:

Use to encode the unique identifier for the material being described, in alphanumeric format. For example, a collection code or number, or accession or call number(s).

## Examples

1:

```
<unitid encodinganalog="099" label="Identification" repositorycode="US-txdtuna"
countrycode="US">02/UG16</unitid>
```

2:

```
<unitid label="Accession number:" countrycode="US" repositorycode="US-txau"
encodinganalog="099">AR.1992.023</unitid>
```

## Common Issues:

Some errors are caused because of missing attributes or the value is incorrect. For example, all Benson Latin American Collection finding aids need to have the normalized MARC organization code in @repository (change from "TxU-LA" to "txula")

To find a Library of Congress library ID (MARC organization code), see Appendix 2, or search this site: <https://www.loc.gov/marc/organizations/org-search.php>

## Purpose:

This element will be part of a set of elements that are required to have consistent data for a subset/portion of all finding aids in TARO.

## abstract:

EAD Tag	Status	Tag Location	Required Child Element
<abstract>	Required	archdesc > did > abstract	

EAD Tag	Attribute	Value
<abstract>	label	Abstract:

<code>&lt;abstract&gt;</code>	encodinganalog	520\$a
-------------------------------	----------------	--------

## What Does the Best Practice Guidelines Say:

TARO's stylesheet supplies this label attribute value by default if the repository does not enter a different value. Entering the default value is preferred practice.

## Examples:

1.

```
<abstract encodinganalog="520$a" label="Abstract">The papers of History professor Donald Chipman.</abstract>
```

2:

```
<abstract label="Abstract:" encodinganalog="520$a">Leonard T. Eck and his family (including son Alvin A. Eck) came to Austin from Cedar Falls, Iowa in the late 1870s and established himself as a local businessman. The collection consists of records dating from 1882 to 1949 concerning Eck's real estate holdings and businesses as well as some personal legal materials and a few items belonging to other family members.</abstract>
```

## Common Issues:

Some finding aids may have encodinganalog="520" so the "\$a" will need to be added to the end of the encodinganalog attribute. See the examples for the correct encoding. For remediation purposes, repurpose the Scope/Content statement for the abstract element should one not exist.

## Purpose:

The abstract will be used for Dublin Core (DC) mapping and will be part of a set of elements that are required to have consistent data for a subset/portion of all finding aids in TARO. The TARO 2.0 display will show this abstract when displaying search results so that researchers and website visitors can better determine which finding aids to further review.

## physdesc:

EAD Tag	Status	Tag Location	Required Child Element
<code>&lt;physdesc&gt;</code>	Required	archdesc > did > physdesc	

EAD Tag	Attribute	Value
<code>&lt;physdesc&gt;</code>	label	Quantity:
<code>&lt;physdesc&gt;</code>	encodinganalog	300\$a

## What Does the Best Practice Guidelines Say:

TARO's stylesheet will supply this label attribute value by default if the repository does not enter a different value. Entering the default value is preferred practice.

## Examples

1:

```
<physdesc label="Physical Description" encodinganalog="300$a"><extent type="Boxes">26  
Boxes</extent></physdesc>
```

2:

```
<physdesc label="Quantity:" encodinganalog="300$a"><extent>0.4 linear feet</extent>  
(<extent>1 box</extent>)</physdesc>
```

## Common Issues:

In some cases physdesc might be missing entirely or missing the @encodinganalog attribute.  
sample errors:

- Missing physdesc when trying to find the extent.

- Missing attributes on physdesc, should have @encodinganalog.
- Missing the encodinganalog attribute on physdesc.

### Purpose:

This element will be part of a set of elements that are required to have consistent data for a subset/portion of all finding aids in TARO.

### extent:

EAD Tag	Status	Tag Location	Required Child Element
<extent>	Required	archdesc > did > physdesc > extent	<extent>

EAD Tag	Attribute	Value
<physdesc>	label	Quantity:
<physdesc>	encodinganalog	300\$a

### What Does the Best Practice Guidelines Say:

This element is required by the Best Practices Guidelines and should be formatted according to community standards.

### Examples:

1.

```
<physdesc label="Physical Description"><extent encodinganalog="300$a" type="Boxes">26  
Boxes</extent></physdesc>
```

2:

```
<physdesc label="Quantity:" encodinganalog="300$a"><extent>0.4 linear feet</extent>
(<extent>1 box</extent>)</physdesc>
```

## Common Issues:

Older finding aids may have an Extent label and Extent statement, but if there is no <extent> element tag, then the compliance checker will produce the error “Missing extent when trying to find the extent”. Properly open and close the <extent> element within <physdesc>.

## Purpose:

This element will be part of a set of elements that are required to have consistent data for a subset/portion of all finding aids in TARO.

## language:

EAD Tag	Status	Tag Location	Required Child Element
<b>&lt;language&gt;</b>	Required	archdesc > did > langmaterial>language	None

EAD Tag	Attribute	Value
<b>&lt;langmaterial&gt;</b>	label	Language:
<b>&lt;langmaterial&gt;</b>	encodinganalog	546\$a
<b>&lt;language&gt;</b>	langcode	<a href="#">Three letter ISO 639-2 language code</a>

## What Does the Best Practice Guidelines Say:



TARO's stylesheet supplies this label attribute value by default if the repository does not enter a different value. Entering the default value is preferred practice (BPG 39).

## Examples:

1:

```
<langmaterial encodinganalog="546$a" label="Language of Materials">
  <language encodinganalog="041" langcode="eng">English</language>
  <language encodinganalog="041" langcode="spa">Spanish;Castilian</language>
</langmaterial>
```

2:

```
<langmaterial label="Language:" encodinganalog="546$a">
  <language langcode="eng" scriptcode="Latn">English</language>
</langmaterial>
```

## Common Issues:

Some finding aids may have encodinganalog="546" so the "\$a" will need to be added to the end of the encodinganalog attribute. See the examples for the correct encoding.

## Purpose:

Tied to site functionality - The Minimum Viable Product (MVP) document has the following requirement:

- Ability to filter simple and advanced results by: Creator, Date, **Language**, Repository

## bioghist:

EAD Tag	Status	Tag Location	Required Child Element
< <i>bioghist</i> >	Preferred*	archdesc > bioghist	

*\*Will be treated as Warning*

EAD Tag	Attribute	Value
<b>&lt;bioghist&gt;</b>	encodinganalog	545

### What Does the Best Practice Guidelines Say:

Enter biographical information about the individual(s) or the administrative history of a corporate body represented in the collection in accordance with DACS Chapter 11.

### Examples

**1:**

*Example will be added in the future*

**2:**

Example will be added in the future

### Common Issues:

If using a template, ensure that it meets current TARO standards and the <bioghist> tag is nested in the proper place.

### Purpose:

This is a valuable element in EAD that TARO has determined is preferred to meet community standards.

### scopecontent:

EAD Tag	Status	Tag Location	Required Child Element
<b>&lt;scopecontent&gt;</b>	Preferred	archdesc > scopecontent	<head>

*\*Will be treated as Warning*

EAD Tag	Attribute	Value
<code>&lt;scopecontent&gt;</code>	encodinganalog	520\$b

## What Does the Best Practice Guidelines Say:

If `<scopecontent>` is used the encoding analog is required.

### Examples:

1:

```
<scopecontent encodinganalog= "520$b" id= "a3">
  <head>Scope and Contents</head>
  <p>The papers in this collection document the work on <emph
render="underline">The Dallas Cowboys and the NFL</emph>, a book Dr. Chipman wrote with
Dr. Randolph Campbell and Dr. Robert Calvert. This material contains drafts, notes, articles,
brochures, clippings, correspondence, galley sheets, interviews, and statistics.</p>
  <p>There are also papers that document Dr. Chipman's research on
Spanish Texas. His Spanish material consists of Spanish records microfilm and prints from
microfilm, which document materials that date from the 1530s.</p>
</scopecontent>
```

2:

```
<scopecontent encodinganalog= "520$b">
  <head>Scope and Contents</head>
  <p>The majority of the Leonard Eck Papers concerns the business and real estate dealings of
Leonard Eck. The Leonard Eck series (1882-1914) consists of business records such as an
account book that lists loans made and collateral received in return; promissory notes;
correspondence concerning payments dues; account charges; business licenses and legal
documents (Deeds Under Order of Sale, Bills of Cost and Deeds from the Sheriff). Real estate
materials include Warranty Deeds, General Land Office payment certificates, Abstracts of Title
and correspondence. His work as a "collateral broker" and his real estate investments
sometimes overlapped as customers occasionally used land as collateral.</p>
  <p>In addition to the Leonard Eck documents there are a few items attributed to other
members of the family. This series (1914, 1949, undated) includes Henry Eck's South Austin High
School report card, adoption papers allowing Henry Eck to adopt the three children of his
```

brother Alvin and his wife Agnes and a certificate of registry for a boar purchased by a relation of Mrs. Jennie Stewart (daughter of Leonard, sister to Henry and Alvin).</p>  
</scopecontent>

## Common Issues:

Ensure that the proper encodinganalog is applied as older finding aids may be missing the “\$b” at the end of “520”

## Purpose:

This is a valuable element in EAD that TARO has determined is preferred to meet community standards.

## arrangement:

EAD Tag	Status	Tag Location	Required Child Element
<arrangement>	Preferred*	archdesc > arrangement	

*\*Will be treated as Warning*

EAD Tag	Attribute	Value
<arrangement>	encodinganalog	351

## What Does the Best Practice Guidelines Say:

Enter the arrangement or organization, as appropriate.

## Examples

1:

```
<arrangement encodinganalog="351">
<p>Arranged in two series: <ref target="series1">1. Correspondence</ref>; 2. Subject files</p>
</arrangement>
```

2:

*Example will be added in the future*

### Common Issues:

If using a template, ensure that it meets current TARO standards and the <arrangement> tag is nested in the proper place.

### Purpose:

This is a valuable element in EAD that TARO has determined is preferred to meet community standards.

### accessrestrict:

EAD Tag	Status	Tag Location	Required Child Element
<accessrestrict>	Preferred	archdesc > accessrestrict	

*\*Will be treated as Warning*

EAD Tag	Attribute	Value
<accessrestrict>	encodinganalog	506

## What Does the Best Practice Guidelines Say:

If <accessrestrict> is used, the encoding analog is required.

### Examples:

1:

```
<accessrestrict encodinganalog="506">
  <head>Conditions Governing Access:</head>
  <p>This collection is not restricted.</p>
</accessrestrict>
```

2:

```
<accessrestrict id="a14" encodinganalog="506">
  <head>Restrictions on Access</head>
  <p>Open to all users.</p>
</accessrestrict>
```

### Common Issues:

If using a template, ensure that it meets current TARO standards and the <accessrestrict> tag is nested in the proper place.

### Purpose:

This is a valuable element in EAD that TARO has determined is preferred to meet community standards.

### userrestrict:

EAD Tag	Status	Tag Location	Required Child Element
<userrestrict>	Preferred	archdesc > userrestrict	

*\*Will be treated as Warning*

EAD Tag	Attribute	Value
<code>&lt;userrestrict&gt;</code>	encodinganalog	540

## What Does the Best Practice Guidelines Say:

If `<userrestrict>` is used the encoding analog is required.

## Examples:

1:

```
<userrestrict encodinganalog="540">
    <head>Conditions Governing Use:</head>
    <p>Reproduction and publication of materials in this collection are
    subject to the policies of the UNT Special Collections department.
    Copyright restrictions may apply.</p>
</userrestrict>
```

2:

```
<userrestrict encodinganalog="540" id="a15">
    <head>Restrictions on Use</head>
    <p>The Austin History Center (AHC) is the owner of the physical materials in the AHC
    collections and makes available reproductions for research, publication, and other uses. Written
    permission must be obtained from the AHC before any publication use. The AHC does not
    necessarily hold copyright to all of the materials in the collections. In some cases, permission for
    use may require seeking additional authorization from the copyright owners. Consult repository
    for more details.</p>
</userrestrict>
```

## Common Issues:

If using a template, ensure that it meets current TARO standards and the `<userrestrict>` tag is nested in the proper place.

## Purpose:

This is a valuable element in EAD that TARO has determined is preferred to meet community standards.

## relatedmaterial:

EAD Tag	Status	Tag Location	Required Child Element
<code>&lt;relatedmaterial&gt;</code>	Preferred*	archdesc > relatedmaterial	

*\*Will be treated as Warning*

EAD Tag	Attribute	Value
<code>&lt;relatedmaterial&gt;</code>	encodinganalog	544 1

## What Does the Best Practice Guidelines Say:

Enter information about related material/collections and the name of the holding-repository if applicable; may include <archref>; <extref>; <list>; etc.

## Examples

1:

```
<relatedmaterial encodinganalog="544">  
<p> <extref xlink:href="http://hdl.loc.gov/loc.mss/eadmss.ms006016"  
xlink:actuate="onrequest" xlink:type="simple" xlink:show="new">Lucy Kroll papers,  
Library of Congress</extref>  
</relatedmaterial>
```

2:

*Example will be added in the future*



## Common Issues:

If using a template, ensure that it meets current TARO standards and the <relatedmaterial> tag is nested in the proper place.

## Purpose:

This is a valuable element in EAD that TARO has determined is preferred to meet community standards.

## prefercite:

EAD Tag	Status	Tag Location	Required Child Element
<prefercite>	Required	archdesc > prefercite  OR  archdesc > descgrp > prefercite	

EAD Tag	Attribute	Value
<prefercite>	encodinganalog	524

## What Does the Best Practice Guidelines Say:

Enter preferred citation.

## Examples

1:

```
<prefercite encodinganalog="524">
<head>Preferred Citation:</head>
<p><emph render="italic">Donald Chipman Papers, </emph> University of North Texas Special
Collections</p>
</prefercite>
```

2:

```
<prefercite encodinganalog="524" id="a18">
  <head>Preferred Citation</head>
  <p>Leonard T. Eck Papers (AR.1992.023). Austin History Center, Austin Public Library,
Texas.</p>
</prefercite>
```

## Common Issues:

If using a template, ensure that it meets current TARO standards and the <prefercite> tag is nested in the proper place.

## Purpose:

The Minimum Viable Product (MVP) document has the following requirement:

- Generates basic citation and includes: Collection title, URL, repository, date access (today's date).

## acqinfo:

EAD Tag	Status	Tag Location	Required Child Element
<acqinfo>	Preferred	archdesc > acqinfo  OR archdesc > descgrp > acqinfo	

*\*Will be treated as Warning*

EAD Tag	Attribute	Value
<b>&lt;acqinfo&gt;</b>	encodinganalog	541

## What Does the Best Practice Guidelines Say:

Enter accession information. If <acqinfo> is used the encoding analog is required.

### Examples:

```
...
<acqinfo encodinganalog="541">
  <head>Acquisition Information</head>
  <p>Donation.<!-- or Purchase. --></p>
  <!-- <p>Accession numbers: [list the accession numbers for the collection]</p> -->
</acqinfo>
...
```

**1:**

```
<acqinfo encodinganalog="541">
  <head>Acquisition Information:</head>
  <p>Gift</p>
</acqinfo>
```

**2:**

```
<acqinfo encodinganalog="541" id="a19">
  <head>Acquisition Information</head>
  <p>Donor #: DO/1992/096</p>
  <p>Donation Date: 1992</p>
</acqinfo>
```

### Common Issues:

You can use language below if you don't know if the collection was acquired via gift/donation versus purchase.

```
<acqinfo encodinganalog="541">
  <head>Acquisition Information</head>
  <p>Information of acquisition method not available.</p>
  <!-- <p>Accession numbers: [list the accession numbers for the collection]</p> -->
```

</acqinfo>

### Purpose:

This is a valuable element in EAD that TARO has determined is preferred to meet community standards.

### processinfo:

EAD Tag	Status	Tag Location	Required Child Element
<processinfo>	Preferred	archdesc > processinfo  or archdesc > descgrp > processinfo	

*\*Will be treated as Warning*

EAD Tag	Attribute	Value
<processinfo>	encodinganalog	583

### What Does the Best Practice Guidelines Say

Enter processing information. If <processinfo> is used the encoding analog is required.

### Examples:

1:

```
<processinfo encodinganalog="583">  
  <head>Processing Information</head>  
  <p>Rachel Motes processed an accretion of one box [Box 27: Reel to Reel Tapes] to this  
collection on July 7, 2017.</p>  
</processinfo>
```

2:

```
<processinfo encodinganalog="583" id="a20">  
  <head>Processing Information</head>  
  <p>Finding aid created and encoded by Molly Hults in 2014.</p>  
</processinfo>
```

### Common Issues:

Use the language below if the collection is processed but the names of the person or group who processed the collection is not available.

```
<processinfo encodinganalog="583">  
  <head>Processing Information</head>  
  <p>Processing information not available.</p>  
</processinfo>
```

Use the language below when a preliminary finding aid was created but the collection is not processed.

```
<processinfo encodinganalog="583">  
  <head>Processing Information</head>  
  <p>Collection is unprocessed.</p>  
</processinfo>
```

This language is recommended but repositories may have their own generic data template for acqinfo and processinfo.

### Purpose:

This is a valuable element in EAD that TARO has determined is preferred to meet community standards.

### altformavail:

EAD Tag	Status	Tag Location	Required Child Element
---------	--------	--------------	------------------------

<b>&lt;altformavail&gt;</b>	Preferred*	archdesc > altformavail	
-----------------------------	------------	----------------------------	--

***\*Will be treated as Warning***

EAD Tag	Attribute	Value
<b>&lt;altformavail&gt;</b>	encodinganalog	530

## What Does the Best Practice Guidelines Say:

Enter other forms available.

## Examples

**1:**

```
<altformavail encodinganalog="530">
    <head>Other Formats for the Records</head>
    <p>The School for the Blind and Visually Impaired maintains current and archived
minutes and agenda on its website (<extref xmlns:xlink="http://www.w3.org/1999/xlink"
xlink:type="simple" xlink:show="new" xlink:actuate="onRequest"
xlink:href="http://www.tsbvi.edu/board-of-trustees-info-and-minutes-items">http://www.tsbvi.
edu/board-of-trustees-info-and-minutes-items</extref>).</p>
</altformavail>
```

**2:**

*Example will be added in the future*

## Common Issues:

If using a template, ensure that it meets current TARO standards and the <altformavail> tag is nested in the proper place.

## Purpose:

This is a valuable element in EAD that TARO has determined is preferred to meet community standards.

## separatedmaterial:

EAD Tag	Status	Tag Location	Required Child Element
<code>&lt;separatedmaterial&gt;</code>	Preferred*	archdesc > separatedmaterial	

*\*Will be treated as Warning*

EAD Tag	Attribute	Value
<code>&lt;separatedmaterial&gt;</code>	encodinganalog	544 0

### What Does the Best Practice Guidelines Say:

Enter separated material.

### Examples

**1:**

*Example will be added in the future*

**2:**

*Example will be added in the future*

### Common Issues:

If using a template, ensure that it meets current TARO standards and the `<separatedmaterial>` tag is nested in the proper place.

### Purpose:

This is a valuable element in EAD that TARO has determined is preferred to meet community standards.

## dsc:

EAD Tag	Status	Tag Location	Required Child Element
<code>&lt;dsc&gt;</code>	Preferred		

EAD Tag	Attribute	Value
<code>&lt;dsc&gt;</code>	type	in-depth combined

### What Does the Best Practice Guidelines Say

A wrapper element that bundles information about the hierarchical arrangement of the materials being described. The `<dsc>` element surrounds all other (subordinate) elements in the Description of Component Parts section of the finding aid. A single `<dsc>` should be used with nested components in which descriptions for subgrp, series, subseries, file, item, and other level (as reflected in the intellectual arrangement of the collection) are placed at the appropriate level in the component hierarchy.

@type value should be either in-depth or combined (verify this attribute value and change to combined when combining multiple `<dsc>` elements).

1:

```
<dsc type="combined">  
  <head>Detailed List of Contents</head>  
  <c01 level="series">
```

2:

```
<dsc type="combined" id="a23">  
  <head>Detailed Description of the Collection</head>
```



<c01 level="series">

## Common Issues:

In some cases the @type attribute is missing and is required if dsc is present.

### Purpose:

This is a valuable element in EAD that TARO has determined is preferred to meet community standards.

## controlaccess

*The <controlaccess> section will also be treated with a Warning instead of as a requirement for migration. A guide to creating and/or editing control access terms will be available in Summer 2021 after development of a controlled master term list is developed.*

## Attribute Errors:

Some of these errors were mentioned in their respective element sections, above.

@era, @calendar, @type and @normal attributes are needed for <unitdate> (in the higher level <did> where collection dates are entered). See examples below:

```
<unitdate label="Dates:" type="inclusive" encodinganalog="245$f" normal="1959/2011"
era="ce" calendar="gregorian">1959-2011, </unitdate>
<unitdate label="Dates:" type="inclusive" encodinganalog="245$f" normal="2019" era="ce"
calendar="gregorian">2019</unitdate>
```

```
<unitdate label="Dates:" type="inclusive" encodinganalog="245$f" normal="1991/2018"
era="ce" calendar="gregorian">1991-2018</unitdate>
<unitdate label="Dates (Bulk):" type="bulk" encodinganalog="245$g" normal="1991/2008"
era="ce" calendar="gregorian">1991-2008</unitdate>
```

The attributes used in <unitdate> are very important because that's how we ensure that dates are machine readable. There are MVP requirements to allow sort and filter of simple and advanced search results by date. Again, this refers to the collection dates entered in the collection overview section not dates in the inventory section.

**@source** is needed for subject entries in <controlaccess> and in other parts of the finding aid (for example with <persname>, <famname> or <corpname> in the Creator field – see notes above about requirements associated with Creator).

**@encodinganalog** used throughout finding aid and used to enter MARC field numbers

All the attributes are important because that's how we can ensure that finding aid data can be mapped to other standards. The ability to export finding aid metadata into other metadata standards (e.g. MARC, Dublin Core) will depend on consistent use of the attributes. For example, @encodinganalog is needed for the mapping to MARC metadata.

### **Why:**

Any elements / attributes that are Required are those that map to fields that appear in the Collection overview/Descriptive summary section and/or tied to MVP requirements.

All the attributes are important because that's how we can ensure that finding aid data can be mapped to other standards. The ability to export finding aid metadata into other metadata standards (e.g. MARC, Dublin Core) will depend on consistent use of the attributes. For example, @encodinganalog is needed for the mapping to MARC metadata.

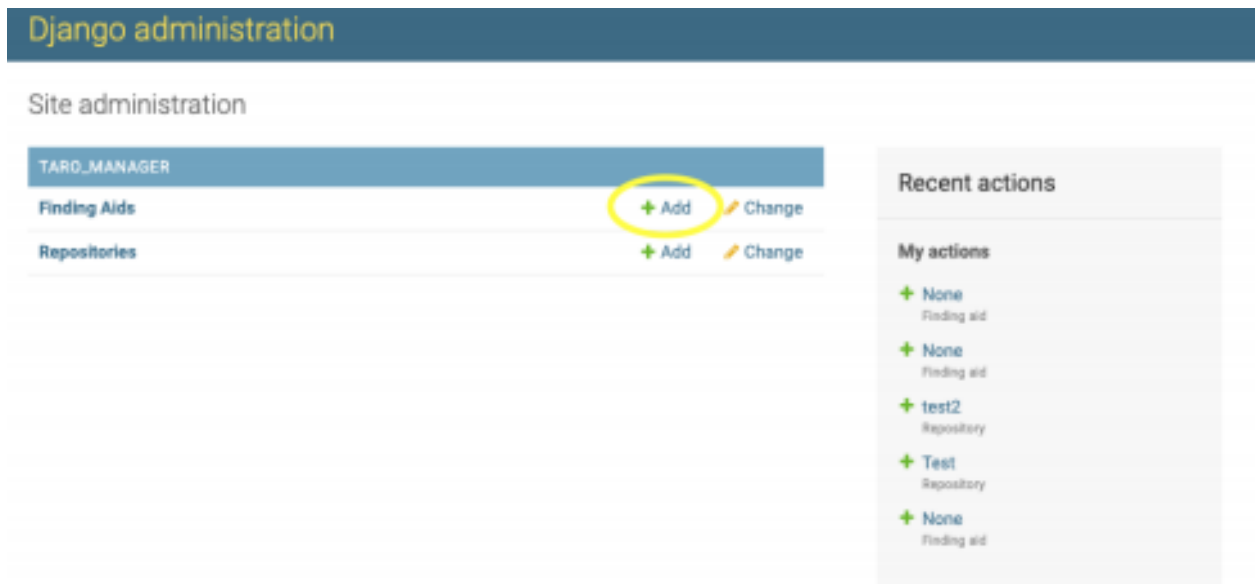
# Appendix 1:

## Accessing the TARO 2 QUAL website

The TARO 2 QUAL website is available for you to check if your finding aids pass the error check.

Please note that no file mount is attached which means that files will not persist on the site and will not be migrated to the production environment. To test your finding aids:

1. Navigate to <http://taro-qual.lib.utexas.edu/>.
2. Log in with the credentials accessible via the link in [Error Checking after Editing](#), above.
3. Select “Add” to add a new finding aid.



4. Click “Choose Files” to add one or more xml files from your computer.

Django administration

WELCOME, QWAL. VIEW SITE / CHANGE PASSWORD / LOG OUT

Home > Taro Manager > Finding Aids > Add finding aid

Add finding aid

File:  No file chosen

Repository:

5. Select the appropriate repository and click “SAVE.” Note: the file does not actually save so you can select any repository while testing in order to save time!

6. Upon upload, the finding aid will **first** be checked for **EAD validation**. This is the process that has always been in place for TARO finding aids, which ensures that the file’s baseline XML encoding is valid. If it fails, you will get the **error** message below and must fix the finding aid before proceeding.

Django administration

WELCOME, QWAL. VIEW SITE / CHANGE PASSWORD / LOG OUT

Home > Taro Manager > Finding Aids > Add finding aid

Add finding aid

Please correct the error below.

Provided XML file does not pass EAD validation: Element {urn:isbn:1-931666-22-9#ead}: This element is not expected, line 48

File:  No file chosen

Repository:

7. When the finding aid passes EAD validation, it is **next** checked for **Required fields**. If it fails the compliance check, you will get the **error** message(s) below and must fix the errors identified before re-uploading the finding aid to check your work.

Django administration WELCOME, QWAL: VIEW SITE / CHANGE PASSWORD / LOG OUT

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### Add finding aid

Please correct the error below:

- 00006.xml: Missing abstract when trying to find the abstract.
- 00006.xml: Missing the encodinganalog attribute on language.
- 00006.xml: Missing language when trying to find the language.
- 00006.xml: Missing the encodinganalog attribute on repository.
- 00006.xml: Missing author when trying to find the author.
- 00006.xml: Missing attributes on date, should have @iana.
- 00006.xml: Missing attributes on date, should have @calendar.
- 00006.xml: Missing head when trying to find the head.
- 00006.xml: Missing extref when trying to find the extref.
- 00006.xml: Missing the encodinganalog attribute on update.
- 00006.xml: Missing the era attribute on update.
- 00006.xml: Missing the calendar attribute on update.
- 00006.xml: Missing attributes on untitle, should have @encodinganalog.
- 00006.xml: Missing the encodinganalog attribute on physdesc.
- 00006.xml: Missing the encodinganalog attribute on scopecontent.

8. When the finding aid passes the compliance check, it is **last** checked for **Recommended fields**. Since these changes are only recommendations, you will see a **Warning** with a list of missing or changeable fields. You can select “Update Finding Aid and ignore warnings”, which allows you to move onto the next finding aid without correcting these non-mandatory errors. OR you may select “Do not create/update Finding Aid with warnings (this is the default),” which allows you to go back and fix the Warnings.

Django administration WELCOME, QWAL: VIEW SITE / CHANGE PASSWORD / LOG OUT

Home / Tools Manager / Finding Aids / Add finding aid

### Add finding aid

The uploaded finding aid has at least one warning. You may upload the file as it is or correct the issue(s) listed below. To upload the file, choose the file(s) to upload again and click the “Update Finding Aid and ignore warnings.” button, then click Save. Otherwise, correct the warnings in the XML file and reupload it.

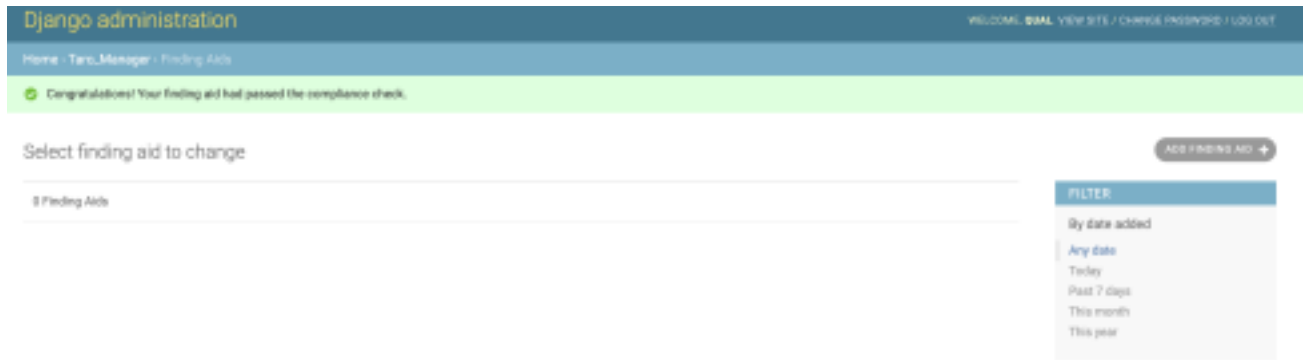
- 00004.xml: Missing publisher when trying to find the publisher.

File:  No file chosen

Repository:

Confirmation: ☐ Update Finding Aid and ignore warnings.  
☒ Do not create/update Finding Aid with warnings (this is the default).

9. When the finding aid passes the compliance check, you will receive a “Congratulations” message and can repeat the testing process as needed with other finding aids.



## Appendix 2:

### Library of Congress Repository Codes

African American Library at the Gregory School (aalgs)  
African American Museum (aam)  
Austin Presbyterian Theological Seminary (apts)  
Austin History Center, Austin Public Library (aushc)  
Baylor University, Armstrong Browning Library (bayabl)  
Baylor University, Keston Center for Religion, Politics, and Society (baykc)  
Baylor University, W.R. Poage Legislative Library (baypll)  
Baylor University, The Texas Collection (baytc)  
Catholic Archives of Texas (carcht)  
Concordia University (concordia)  
Dallas Historical Society (dalhs)

Dallas Public Library, TX/Dallas History and Archives Division (dalpub)  
 Daughters of the Republic of Texas Library at the Alamo (drtsa)  
 Fort Worth Jewish Archives (fwjarch)  
 El Paso Public Library, Border Heritage Center (epbhc)  
 Emily Fowler Central Library, part of the Denton Public Library (efcl)  
 Harris County Archives (hcarch)  
 Harlingen Public Library (harpl)  
 Houston Academy of Medicine Texas Medical Center Library, John P. McGovern Historical Collections and Research Center (hamtmc)  
 Houston Public Library, Houston Metropolitan Research Center (houpub)  
 Lamar University (lamar)  
 Menil Collection Archives (menil)  
 The Museum of Fine Arts, Houston (mfah)  
 Moore Memorial Public Library (mmpl)  
 Panhandle-Plains Historical Museum Research Center (pphmrc)  
 Robert E. Nail Archives at the Old Jail Art Center (ojac)  
 Rice University, Fondren Library, Woodson Research Center (ricewrc)  
 San Antonio Municipal Archives (sama)  
 San Antonio Public Library (sapl)  
 Albert and Ethel Herzstein Library, San Jacinto Museum of History (sjmh)  
 Southern Methodist University (smu)  
 Texas State Library and Archives Commission (tslac)  
 Texas Tech University, Southwest Collection/Special Collections (ttusw)  
 Texas Tech University, Audio/Visual Materials (ttuav)  
 Texas Tech University, Rare Books (tturb)  
 Texas Tech University, University Archives (ttuua)  
 Texas Tech University, Vietnam Center and Archive (ttuva)  
 Texas General Land Office Archives and Records (txglo)  
 Tyrrell Historical Library (tyrrell)  
 University of Texas at Austin. Alexander Architectural Archive (utaaa)  
 University of Texas at Austin. Briscoe Center (utcah)  
 Harry Ransom Center, University of Texas at Austin (uthrc)  
 UT Health Science Center San Antonio (uthscsa)  
 UT Human Rights Documentation Initiative (hrdi)  
 University of Texas at Austin. Benson Latin American Collection (utlac)  
 Tarlton Law Library, University of Texas at Austin (utlaw)  
 Texas A&M University (tamucush)  
 Texas A&M University-Corpus Christi (tamucc)  
 Texas A&M University-Kingsville (tamuk)  
 Texas Christian University's Special Collections (tcusp)  
 Texas State University, Wittliff Collections (tsusm)  
 Texas Women's University, the Women's Collection (twu)  
 University of Texas Arlington Special Collections (utarl)  
 H. J. Lutzer Stark Center, University of Texas at Austin (utlsc)

Truman G. Blocker, Jr. History of Medicine Collections, Moody Medical Library, University of Texas Medical Branch, Galveston (utmb)  
University of North Texas Archives (unt)  
University of North Texas Music Library Special Collections (untmlsc)  
University of Texas El Paso, including C. L. Sonnischen (utep)  
University of Texas M. D. Anderson Cancer Center (utmda)  
University of Houston Clear Lake (uhcl)  
University of Houston Libraries, Special Collections (uhsc)  
University of Houston Libraries, University Archives (uhua)  
University of Houston Women's Archive and Research Center (uhwarc)  
University of St. Thomas Archives (stthomas)  
University of Texas San Antonio Archives (utsa)  
University of Texas at Tyler Archives and Special Collections (uttyler)