



# TARO

Texas Archival  
Resources Online

## TEXAS ARCHIVAL RESOURCES ONLINE BEST PRACTICES GUIDELINES 2022

VERSION 4

Prepared and maintained by the TARO Standards Subcommittee

Version 1: 2001-mm-dd

Version 2: 2003-mm-dd

Version 3: 2017-03-16

Version 4 Beta: TARO 2.0 Remediation Updates: 2020-12-18

Version 4: 2022-04-26

# Contents

Introduction	6
Standards and Resources that inform our work	6
Tools and Help Available	7
User Accounts	7
Uploading finding aids	8
Acknowledgements and Statement of Responsibility	8
TARO Encoding information	8
Color coding	8
Terminology	9
Repeatability of Elements	11
Statement About Examples	12
Creating TARO Finding Aids	12
Top Matter	13
Encoded Archival Description - website required	13
EAD Header - website required	13
EAD Identifier - website required	13
Title Statement – website required	14
Title Proper - website required (child element of <titlestmt>)	14
Subtitle - website optional (child element of <titlestmt>)	14
Author - website warning (child element of <titlestmt>)	14
Sponsor-website warning (child element of <titlestmt>)	14
Publication Statement - website required	15
Publisher - website required (child element of <publicationstmt>)	15
Date - website required (child element of <publicationstmt>)	15
Profile Description - website optional	15
Creation - website optional (child element of <profiledesc>)	16
Language Usage - website optional (child element of <profiledesc>)	16
Descriptive rules - website optional (child element of <profiledesc>)	16
Revision Description - website optional	17
Change - website optional (child element of <revisiondesc>)	17
Collection Summary	18

Archival description – website required	18
Descriptive Information – website required (child element of <archdesc>)	18
Origination (Creator ) – website required	18
Personal Name, Corporation Name, Family Name – website required (child element of <origination>)	18
Title of unit– website required	20
Date of a unit – website required	20
Inclusive dates – website required	21
Bulk dates - optional	22
Abstract – website required	22
ID of unit – website required	23
Physical description - website required	23
Extent – website required (child element of <physdesc>)	24
Language of the materials– website required	24
Repository – website required	25
Collection Details	26
Biographical or Administrative History – website warning	26
Scope and content – website warning	26
Arrangement – website optional	27
Collection Restrictions	28
Access Restrictions – website warning	28
Use Restrictions – website warning	28
Physical Characteristics and Technical Requirements – website optional	29
Acquisition and Administrative Information	30
Preferred Citation – website required	30
Acquisition Information – website warning	30
Processing Information – website warning	31
Accruals – website optional	32
Alternative Form Available – website warning	32
Location of Originals – website optional	33
Other Resources	34
Related Materials – website warning	34
Separated Material – website warning	34

Other Finding Aid – website optional	35
Bibliography – website optional	35
Subject Terms	36
Controlled Access Headings – website warning	36
Child Elements of controlled access headings	37
Other Information	40
Other Descriptive Data – website optional	40
Inventory	40
Description of Subordinate Components – website warning	40
Component Levels – website warning (Child of the <dsc>)	40
Descriptive Identification (Child of the <dsc>)	41
More detailed elements outside the <did> - OPTIONAL	43
Generic Elements Used Within Finding Aid	45
Internal and External Linking	45
Extended reference	45
Reference and Pointer	45
Digital Archival Object	46
Formatting	47
List	47
Emphasis	48
Title	48
Special Characters	49
Appendix A—Revision History of the Best Practices Guidelines	50
Appendix B—Changes in Practice	51
Split Finding Aids	51
Description Group tag	51
Periods with Control Access Terms	51
Note tag	51
Appendix C- Guidelines Table	52

## INTRODUCTION

[Texas Archival Resources Online](#) (TARO) is a freely accessible platform for searching finding aids from repositories across Texas, including museums, governments, universities, and historical societies to name a few. The scope of primary source material discoverable on TARO is as historically rich and diverse as the state itself.

For some repositories, TARO provides the easiest way to put finding aids online. For others, it offers an additional access point beyond their local systems. Overall, TARO

- offers the benefit of aggregating these resources
- makes it easier for researchers
- reveals connections in collections across Texas
- provides tools and support for Texas repositories to make their collections discoverable
- promotes Texas repositories and their collections

This Best Practices Guidelines (BPG) exists to support the TARO goals named above and is intended to

- help repositories get their content online and promote discovery by offering best practices, website requirements, and encoding guidelines.
- make it easier for researchers to find things by promoting consistency in archival descriptions across repositories
- facilitate connections across collections by encouraging the use of controlled vocabularies (including the TARO Browse terms)

## STANDARDS AND RESOURCES THAT INFORM OUR WORK

Archival Description benefits from independently maintained standards and resources. TARO relies on standards both to ensure website functionality and to support the experience of users.

The Standards Subcommittee encourages TARO participants to both review relevant professional resources and to apply them in their finding aids to the extent possible. [Creating TARO Finding Aids](#) provides information regarding the application of these resources.

Key resources undergirding TARO include

- Describing Archives: A Content Standard (DACS) <https://saa-ts-dacs.github.io/>
- Encoded Archival Description <https://www.loc.gov/ead/> and <https://eadiva.com/>
- Controlled Vocabularies include
  - TARO Control Access Terms Browse and Advanced Lists  
<http://texastaro.pbworks.com/w/browse/#view=ViewFolder&param=Control%20Access%20List>

- Library of Congress Subject Headings (lcsch)  
<https://id.loc.gov/authorities/subjects.html>
- Library of Congress Name Authority File (lcnaf)  
<https://id.loc.gov/authorities/names.html>
- Faceted Application of Subject Terminology (fast)  
<https://www.oclc.org/research/areas/data-science/fast.html>
- Art & Architecture Thesaurus (aat)  
<https://www.getty.edu/research/tools/vocabularies/aat/>
- Library of Congress Thesaurus for Graphic Materials (lctgm)  
<http://www.loc.gov/pictures/collection/tgm/>
- RBMS Controlled Vocabularies - Genre Terms (gmgpc)  
[https://rbms.info/vocabularies/genre/alphabetical\\_list.htm](https://rbms.info/vocabularies/genre/alphabetical_list.htm)

## TOOLS AND HELP AVAILABLE

In addition to this BPG, TARO maintains a blog, [TARO Today](#), a listserv ([taro-lib@utlists.utexas.edu](mailto:taro-lib@utlists.utexas.edu)), and the [TARO wiki](#) to keep member repositories informed about how to participate in TARO, the maintenance of TARO, and new developments with TARO.

The TARO Standards Subcommittee maintains a [folder](#) of useful documents including

- the EAD Schema file
- the TARO 2.0 EAD Schema .xml template
- examples of TARO-compliant .xml files

More information about using these files is available on [TARO Today](#)

Further notes on using the TARO 2.0 EAD Schema .xml template are that

- The template includes notes to inform which elements are website required and website warnings. Elements enclosed in <!-- --> tags (ex. <!-- Highly preferred by TARO 2.0 -->) will not appear in your finding aid.
- Text in <head> can be changed to repository preference.
- If not using an element, delete the tags as any prepopulated <head> tags will appear on the finding aid.

## USER ACCOUNTS

To create/change user accounts, email anyone in the TARO Administration group. People in the Admin user group include the Steering Chair, Vice Chair, and Immediate Past Chair. You can find a current list of Steering members on the on [TARO Today](#). Send a name and email address when submitting user account changes.

## UPLOADING FINDING AIDS

A TARO user account is required to upload finding aids. See [TARO Today](#) for directions on how to submit finding aids to TARO.

## ACKNOWLEDGEMENTS AND STATEMENT OF RESPONSIBILITY

The BPG is maintained by the TARO Standards subcommittee, with guidance from the TARO Steering Committee. The 2021 Standards subcommittee wishes to acknowledge the work of past members of the subcommittee in creating and maintaining this document. In 2021-2022, the Standards Subcommittee undertook a reorganization of the BPG to align it with the updated requirements of the TARO 2.0. For BPG revision history, see the [Appendix](#).

## TARO ENCODING INFORMATION

TARO uses the EAD 2002 Schema (for more information about TARO and EAD3 see [TARO Today blog post](#)) for coding. The EAD Schema requires that certain elements be encoded in a particular sequence. TARO will accept finding aids with alternative order if the aid complies with the EAD Schema; however, this guide suggests TARO's preferred order of elements.

TARO recommends consistency in the element order both to assist with repository encoding workflow and to avoid confusion for encoders (at repositories and within TARO) who inherit files created by others. See the [EAD 2002 Schema documents](#) folder on the TARO wiki for a template that includes TARO's preferred order of elements.

## COLOR CODING

The following list explains the colors used in this section to delineate different aspects of the code. For more information about Elements and Attributes see [EADiva](#) or [Encoded Archival Description Tag Library - Version 2002 \(EAD Official Site, Library of Congress\) \(loc.gov\)](#)

- Elements are blue (Example: `<eadheader>`)
- Attributes are orange (Example: `langencoding`)
- The "value" of the attribute (text *inside* attributes) is **brown-ish**.
- Text between the open and close tags of the element will be black, normal appearing text. For Example: `<extent>1 Box (1.0 linear foot)</extent>` This space is for entering repository or collection-specific details.
- Examples
  - `<persname source="lcnaf" encodinganalog="100"> Wheelock, Edwin M. (Edwin Miller), 1829-1901</persname>`
  - `<accruals encodinganalog="584"><head>Additions</head>`
  - `<subject encodinganalog="650" source="lcsht">Music--Georgia--Dallas</subject>`

The color coding is only to assist with creating upload files; the colors themselves have no meaning. Depending on the XML editor you use, you may see like colors, or you may see none. The colors in this document are *purely a visual aid*.

## TERMINOLOGY

The following table explains coding terminology used throughout this guide.

<b>Table 1. Common terms used in encoding EAD</b>	
<b>Tag</b>	XML markers that enclose <i>elements</i> and name their type. A tag has two required parts, which delimit an element. start tag <code>&lt;...&gt;</code> and end tag <code>&lt;/...&gt;</code>
<b>Element</b>	An individual <i>EAD</i> datum, represented in mark-up by a start <i>tag</i> <code>&lt;...&gt;</code> and <i>end tag</i> <code>&lt;/...&gt;</code> . The value within the tags identifies the element's type. <code>&lt;language &gt;&lt;/language &gt;</code>
<b>Attribute</b>	Information within a <i>start tag</i> that qualifies or modifies an element. They are rendered using lowercase letters, followed by an "=" and the <i>data value</i> in quotation marks. <code>&lt;language attribute="..."&gt;&lt;/language &gt;</code>
<b>Encoding analog</b>	An attribute that maps an element to the analogous element in another metadata schema, such as MARC 21. <code>&lt;language encodinganalog="546\$a"&gt;&lt;/language &gt;</code>
<b>Wrapper</b>	"Wrapper element" indicates an element that cannot contain text directly; a second, nested element must be opened first. Wrapper elements designate sets of elements that comprise a distinctive section of a finding aid, for example, the Descriptive Identification <code>&lt;did&gt;</code> .



<b>Parent Element</b>	<p>Strings can include both <i>parent</i> and <i>child</i> elements. A parent element wraps around specific child elements but does not contain any text of its own, such as</p> <pre>&lt;ead xmlns="urn:isbn:1-931666-22-9" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:schemaLocation="urn:isbn:1-931666-22-9 ead.xsd" relatedencoding="MARC21"&gt; &lt;eadheader langencoding="iso639-2b" audience="internal" repositoryencoding="iso15511" countryencoding="iso3166-1" scriptencoding="iso15924" dateencoding="iso8601"&gt; &lt;eadid countrycode="US" mainagencycode="US-txsau" encodinganalog="852\$a"&gt;urn:taro:utsa.00405&lt;/eadid&gt;</pre> <p>&lt;ead&gt; is the parent/wrapper; only the child element &lt;eadid&gt; contains text.</p>
<b>Child Element</b>	<p>A subelement appearing within a parent element. Example: &lt;language &gt; is a child element of &lt;langmaterial&gt;:</p> <pre>&lt;langmaterial label="Language:" encodinganalog="546\$a"&gt; &lt;language langcode="eng" scriptcode="Latn" encodinganalog="546\$a"&gt;English&lt;/language &gt; and &lt;language langcode="spa" scriptcode="Latn" encodinganalog="546\$a"&gt;Spanish&lt;/language&gt; &lt;/langmaterial &gt;</pre>

Certain elements and attributes are required or highly recommended, as these will either cause upload to fail or may impede the uploading process.

The following table shows encoding requirements and how they are addressed in the templates.

<b>Table 2. Required and Recommended Content</b>	
<b>Website Required</b>	Item (element/attribute/attribute value) must be included for upload to the TARO website. If not included, the file upload will either fail or be impeded.
<b>Website Warning</b>	Items (element/attribute/attribute value) highly recommended by TARO. An item may be ignored, but a warning will appear prior to upload stating that the item is missing. The file will successfully upload if the warning is overridden. If the element is not relevant to your finding aid, do not use, and override the Website Warning when uploading the finding aid to TARO.
<b>Website Optional</b>	The element is entirely optional and will have no effect on upload/website functionality. Use as necessary for your finding aid.

Descriptions, as showing in the following image, will contain specific information about how to encode these elements, along with examples. **Appendix C – Guidelines Table** also contains a column indicating website requirements for quick reference.

TITLE PROPER - WEBSITE REQUIRED

**<titleproper>** Encode the formal title of the finding aid. This will be used to display the title of the finding aid in TARO 2.0

**Structure/Application:** [<titleproper> Title Proper of the Finding Aid | EADiva](#)

SUBTITLE - WEBSITE OPTIONAL

**<subtitle>** Used to encode the subtitle or other secondary name subordinate to <titleproper>. Element not included in the TARO 2.0 template but can be added. Displays without punctuation - consider adding if using subtitle.

**Structure/Application:** [<subtitle> Subtitle | EADiva](#)

## REPEATABILITY OF ELEMENTS

The EAD Schema allows most elements to be repeated; though, some may only be encoded once. TARO places some additional restrictions on which elements can be repeated. The status

of an element's repeatability is indicated in the third column of the Appendix C – Guidelines Table.

## STATEMENT ABOUT EXAMPLES

Examples provided below are meant to provide guidance but by no means are these examples prescriptive. TARO member repositories are welcome to create local standards for finding aid creation if the TARO Website requirements are met. Website required elements are indicated below and in the Appendix C – Guidelines Table.

Only the most used tags are outlined here; additional elements and attributes are allowed if EAD 2002 and Schema compliant. See the tag library at [About EADiva \(2002\) | EADiva](#) or [Encoded Archival Description Tag Library - Version 2002 \(EAD Official Site, Library of Congress\) \(loc.gov\)](#) for additional options.

The examples have a section header to identify where in the finding aid they exist, the <element> name with a definition, links about where you can learn more about the structure or how to apply this element, and informative notes about how the element has changed in the EAD3 rules (this may be helpful for TARO members who would like to pre-plan for any EAD3 conversion work).

## CREATING TARO FINDING AIDS

This section is the heart of the BPG. In the TARO templates, the content is divided into the following three areas:

- [Top Matter](#)—Includes high-level repository details
- [Collection Summary](#)
- [Collection Details](#)
- [Collection Restrictions](#)
- [Acquisition and Administrative Information](#)
- [Other Resources](#)
- [Subject Terms](#)
- [Other Information](#)
- [Inventory](#)
- [Generic Elements Used Within Finding Aid](#)

## TOP MATTER

### ENCODED ARCHIVAL DESCRIPTION - WEBSITE REQUIRED

**<ead>** Outermost wrapper element. [TARO2\\_EADSchemaTemplate.xml](#) is prepopulated.

**Structure/Application:** [<ead> Encoded Archival Description | EADiva](#)

### EAD HEADER - WEBSITE REQUIRED

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

[TARO2\\_EADSchemaTemplate.xml](#) is prepopulated with default ISO Standards.

**Structure/Application:** [<eadheader> EAD header | EADiva](#)

**EAD3 Notes:** Deprecated in EAD3

### EAD IDENTIFIER - WEBSITE REQUIRED

**<eadid>** Includes `countrycode="US"` and `mainagencycode` specific to your repository found [MARC Code List for Organizations \(Network Development and MARC Standards Office, Library of Congress\) \(loc.gov\)](#).

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

Your repository TARO username is provided when you join TARO. More information is available on the *TARO Today* website.

**Content Standard:** [2.1 Reference Code \(Required\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#)

**Structure/Application:** [<eadheader> EAD header | EADiva](#)

**EAD3 Notes:** Deprecated in EAD3

### Examples:

```
<eadid countrycode="US"
mainagencycode="US-txau">urn:taro:aushc.99998</eadid>
```

```
<eadid countrycode="US-txsau"
countrycode="US" encodinganalog="852$a">urn:taro:utsa.00060</eadid>
```

## TITLE STATEMENT – WEBSITE REQUIRED

**<titlestmt>** Wrapper element for the heading that displays at the top of the finding aid.

**Content Standard:** [2.3 Title \(Required\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#)

TITLE PROPER - WEBSITE REQUIRED (CHILD ELEMENT OF <TITLESTMT>)

**<titleproper>** Encode the formal title of the finding aid. This will be used to display the title of the finding aid in TARO 2.0.

**Structure/Application:** [<titleproper> Title Proper of the Finding Aid | EADiva](#)

SUBTITLE - WEBSITE OPTIONAL (CHILD ELEMENT OF <TITLESTMT>)

**<subtitle>** Used to encode the subtitle or other secondary name subordinate to <titleproper>. Element not included in the TARO 2.0 template but can be added. Displays without punctuation - consider adding if using subtitle.

**Structure/Application:** [<subtitle> Subtitle | EADiva](#)

AUTHOR - WEBSITE WARNING (CHILD ELEMENT OF <TITLESTMT>)

**<author>** Institution(s) or individual(s) responsible for compiling the intellectual content of the finding aid.

**Content Standard:** [8.1 Description Control \(Added Value\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#)

**Structure/Application:** [<author> Author | EADiva](#)

SPONSOR-WEBSITE WARNING (CHILD ELEMENT OF <TITLESTMT>)

**<sponsor>** Encode a statement acknowledging a donor or granting organization whose financial support helped to create the finding aid, if applicable. If the element is not relevant to your finding aid, do not use, and override the Website Warning when uploading the finding aid to TARO. ENCODINGANALOG attribute not required.

**Structure/Application:** [<sponsor> Sponsor | EADiva](#)

**Examples:**

```
<titlestmt>  
<titleproper>Austin Lesbian and Gay Political Caucus  
Records</titleproper>  
<subtitle>An Inventory of the Collection</subtitle>  
<author>Finding aid prepared by Molly Hults</author>  
</titlestmt>
```

```
<titlestmt>
<titleproper>A Guide to the Stewart Title Company Records, 1870-
1965</titleproper>
</titlestmt>

<titlestmt>
<titleproper>Texas Attorney-General Crawford C. Martin
Audiotape:</titleproper>
<subtitle>An Inventory of the Attorney General Crawford C. Martin
Audiotape at the Texas State Archives</subtitle>
<author>Finding aid by Angela Swift</author>
<sponsor encodinganalog="536">This EAD finding aid was created in
cooperation with Texas Archival Resources Online.</sponsor>
</titlestmt>
```

#### PUBLICATION STATEMENT - WEBSITE REQUIRED

**<publicationstmt>** Wrapper element that bundles information regarding the publication and distribution of the encoded finding aid.

**Structure/Application:** [<publicationstmt> Publication Statement | EADiva](#)

PUBLISHER - WEBSITE REQUIRED (CHILD ELEMENT OF <PUBLICATIONSTMT>)

**<publisher>** Name of the party responsible for issuing/distributing the encoded finding aid.

**Structure/Application:** [<publisher> Publisher | EADiva](#)

DATE - WEBSITE REQUIRED (CHILD ELEMENT OF <PUBLICATIONSTMT>)

**<date>** Encode the date the finding aid was published. When <date> is used, the attributes ERA, CALENDAR, and NORMAL are website required.

**Structure/Application:** [<date> Date | EADiva](#)

#### Examples:

```
<publicationstmt>
<publisher>Nettie Lee Benson Latin American Collection</publisher>
<date era="ce" calendar="gregorian" normal="2021">2021</date>
</publicationstmt>
```

#### PROFILE DESCRIPTION - WEBSITE OPTIONAL

**<profiledesc>** Wrapper that bundles information concerning the person, date, language, and guidelines used to create the encoded finding aid. Unpublished element. TARO Standards recommends using this element to track administrative metadata about the finding aid.

**Content Standard:** [8.1 Description Control \(Added Value\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#)

**Structure/Application:** [<profiledesc> Profile Description | EADiva](#)

CREATION - WEBSITE OPTIONAL (CHILD ELEMENT OF <PROFILEDESC>)  
<creation> Information about the creation of the encoded finding aid. Can include <date> element. When <date> is used the attributes ERA, CALENDAR, and NORMAL are website required.

**Structure/Application:** [<creation> Creation | EADiva](#)

LANGUAGE USAGE - WEBSITE OPTIONAL (CHILD ELEMENT OF <PROFILEDESC>)  
<langusage> and <language > Encode the language of the finding aid itself, not the materials in the collection. Template pre-populated with "Finding aid written in English."

**Structure/Application:** [<langusage> Language Usage | EADiva](#)

**EAD3 Notes:** Deprecated in EAD3; replaced by <language declaration>

DESCRIPTIVE RULES - WEBSITE OPTIONAL (CHILD ELEMENT OF <PROFILEDESC>)  
<descrules> Describes standards used in preparing the finding aid

**Structure/Application:** [<descrules> Descriptive Rules | EADiva](#)

**Examples:**

```
<profiledesc>
<creation>Finding Aid was generated by The Keston Center for Religion,
Politics, and Society staff, using the STAR Knowledge Center for Archives
(SKCA) task that automatically creates EAD files from the Archive's SKCA
catalog records. </creation>
<langusage>
<language langcode="eng">English</language>
</langusage>
</profiledesc>
```

```
<profiledesc>
  <creation>Molly Hults <date normal="2017-07-05" era="ce"
calendar="gregorian">July 05, 2017</date>
  </creation>
  <langusage>Finding aid written in <language langcode="eng"
scriptcode="Latn">English.</language></langusage>
  <descrules>Describing Archives: A Content Standard
```

(DACS)</descrules>  
</profiledesc>

## REVISION DESCRIPTION - WEBSITE OPTIONAL

<revisiondesc> Wrapper element to encode information about changes or updates made to the finding aid.

**Content Standard:** [8.1 Description Control \(Added Value\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#)

**Structure/Application:** [<revisiondesc> Revision Description | EADiva](#)

**EAD3 Notes:** Deprecated in EAD3; replaced by <maintenancehistory>

CHANGE - WEBSITE OPTIONAL (CHILD ELEMENT OF <REVISIONDESC>)

<change> Subelement used to create a list of changes. Describe each change/update using <date> and <item> elements. Repeat as necessary

**Structure/Application:** [<change> Change | EADiva](#)

### Examples:

```
<revisiondesc>
  <change>
    <date normal="2018-03-01" era="ce" calendar="gregorian">March
01, 2018</date>
    <item> This finding aid has been updated to reflect contemporary,
culturally responsive language. "Disabled" has been updated to "person
with a disability."</item>
  </change>

  <change>
    <date normal="2016-03-12" era="ce" calendar="gregorian">March
12, 2016</date>
    <item> Digital files processed and integrated into finding aid by Nikki
Koehlert.</item>
  </change> </revisiondesc>
```



## COLLECTION SUMMARY

### ARCHIVAL DESCRIPTION – WEBSITE REQUIRED

**<archdesc>** Wrapper element for the majority of the EAD document that describes the “content, context, and extent of a *body* of archival materials, including administrative and supplemental information that facilitates use of the materials.” TARO .xml template is prepopulated with preferred attributes but can be changed. It is recommended to use “Collection Summary” in the <head> element.

**Content Standard:** [Chapter 1 - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#)

**Structure/Application:** [<archdesc> Archival Description | EADiva](#)

### DESCRIPTIVE INFORMATION – WEBSITE REQUIRED (CHILD ELEMENT OF <ARCHDESC>)

**<did>** Used to bundle other elements identifying core information about the described materials. Called “high level <did>” in the <archdesc>. Required element of <archdesc>.

**Structure/Application:** [<did> Descriptive Identification | EADiva](#)

### Examples:

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

### ORIGINATION (CREATOR) – WEBSITE REQUIRED

**<origination>** Wrapper element that provides the name of the person, family or organization that is responsible for creating or assembling (in the case of artificial collections) the collection. TARO .xml template is prepopulated with LABEL attribute “Creator”.

**Content Standard:** [2.6 Name of Creator\(s\) \(Required, If Known\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#)

**Structure/Application:** [<origination> Origination - EADiva | EADiva](#)

### PERSONAL NAME, CORPORATION NAME, FAMILY NAME – WEBSITE REQUIRED (CHILD ELEMENTS OF <ORIGINATION>)

**<origination>** must contain one or more child elements along with the SOURCE (authority such as lcnaf, fast, or local) and ENCODINGANALOG attributes

**<persname>** - encodes the proper noun designation for an individual. encodinganalog="100"

**Structure/Application:** [<persname> Personal Name | EADiva](#)

**<corpname>** proper noun name that identifies an entity—either an organization or a group of people. encodinganalog="110"

**Structure/Application:** [<corpname> Corporate Name | EADiva](#)

**<famname>** - proper noun designated by a group of persons closely related by blood or forming a household. encodinganalog="100"

**Structure/Application:** [<famname> Family Name | EADiva](#)

**Examples:**

```
<persname source="lcnaf" encodinganalog="100"> Wheelock, Edwin M.
(Edwin Miller), 1829-1901</persname>
<famname source="local" encodinganalog="100">Benson
family</famname>
<corpname source="local" encodinganalog="110">Austin Lesbian and
Gay Political Caucus</corpname>
```

If there are multiple Creators, put all in the same <origination> tag using separate child elements.

```
<origination label="Creator:">
  <persname source="local" encodinganalog="100">Bedichek, Jane
  Gracy</persname>
  <persname source="local" encodinganalog="100">Gracy, John
  A.</persname>
  <persname source="local" encodinganalog="100">Gracy, Bessie
  Wells</persname>
</origination>
```

If the creator is unknown, TARO suggests using the following:

```
<origination label="Creator:">
  <persname source="local"
  encodinganalog="100">Unknown</persname>
</origination>
```

**TITLE OF UNIT— WEBSITE REQUIRED**

**<unittitle>** Element provides a word or phrase by which the material being described is known or can be identified. A title may be devised or formal. ENCODINGANALOG attribute required. TARO does not allow for <unitdate> to be nested in <unittitle>, the updated template structure reflects this change.

**Content Standards:** [2.3 Title \(Required\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](https://github.com/saa-ts-dacs)

**Structure/Application:** [<unittitle> Title of the Unit | EADiva](#)

**Examples:**

`<unittitle label="Title:" encodinganalog="245$a">Ruth Harris Papers</unittitle>`

`<unittitle label="Title:" encodinganalog="245$a">Texas Conference of Churches Records</unittitle>`

`<unittitle label="Title:" encodinganalog="245$a">Jewish Federation of Fort Worth and Tarrant County Collection</unittitle>`

`<unittitle label="Title:" encodinganalog="245$a">Mission San Jose Scrapbook</unittitle>`

**DATE OF A UNIT — WEBSITE REQUIRED**

**<unitdate>** Identifies and records the date(s) that pertain to the creation and/or accumulation of the materials being described. Inclusive dates are required. Bulk dates are optional.

TARO requires that all <unitdate> date elements **above** the <dsc> Description of Subordinate Components element contain the ENCODINGANALOG, NORMAL, TYPE, ERA, and CALENDAR attributes.

- ENCODINGANALOG – “245\$f” – inclusive dates (required) or “245\$g” – bulk dates (optional)
- NORMAL – ISO 8601 Standard “YYYY/YYYY” or “YYYY” or “YYYY-MM” or “YYYY-MM-DD”
- TYPE – “inclusive” (required) or “bulk” (optional)
- ERA – TARO .xml template is prepopulated “ce” for common era
- CALENDAR – TARO .xml template prepopulated “gregorian”
- NORMAL attribute values are machine readable and do not display to the user. These values will be used for the sort and filter results on the TARO website.

DACS recommends that all terms reflecting estimation (use circa, before, or after) be spelled out rather than abbreviated; spell out *Undated* whenever it is use. This standard allows for broader understanding by all users. Open date spans are not permitted by DACS.

**Content Standard:** [2.4 Date \(Required\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](https://saa-ts-dacs.github.io/2.4-Date-Required)

**Structure/Application:** <https://eadiva.com/unitdate/>

**EAD3 Notes:** EAD3 will allow for date characterization with @datechar attribute that will allow for better description of the nature of the date.

#### INCLUSIVE DATES – WEBSITE REQUIRED

Earliest and latest dates of the materials being described. This can be a range, series, or single date.

#### Examples:

**Date range:** If there are multiple dates in the collection, this can be represented by a simple date range.

```
<unitdate label="Inclusive Dates:" type="inclusive" encodinganalog="245$f"
normal="1978/2003" era="ce" calendar="gregorian">1978-2003</unitdate>
```

**Date series or broken date spans:** If only 2 or 3 dates are represented (1878, 2003) or there is a large gap in dates in a collection (1878, 1979-2003) and entering a date range would be misleading, the dates must be entered separately to facilitate normalization.

```
<unitdate label="Inclusive Dates:" type="inclusive" encodinganalog="245$f"
normal="1878" era="ce" calendar="gregorian">1878,</unitdate>
```

```
<unitdate label="Inclusive Dates:" type="inclusive" encodinganalog="245$f"
normal="2003" era="ce" calendar="gregorian">2003</unitdate>
```

```
<unitdate label="Inclusive Dates:" type="inclusive" encodinganalog="245$f"
normal="1878" era="ce" calendar="gregorian">1878,</unitdate>
```

```
<unitdate label="Inclusive Dates:" type="inclusive" encodinganalog="245$f"
normal="1979/2003" era="ce" calendar="gregorian">1979-2003</unitdate>
```

**Single dates:** Express these as year-month or year-month-day.

```
<unitdate label="Inclusive Dates:" type="inclusive" normal="1975-03">1975
March</unitdate>
```

```
<unitdate label="Inclusive Dates:" type="inclusive" normal="1975-03-12">1975
March 12</unitdate>
```

**Estimated dates or undated:** Add certainty="approximate" attribute before the "normal" attribute. For estimated single dates, estimate the nearest year, decade, or other interval as precisely as possible. To normalize undated materials, state undated but provide an estimate if possible; normalize as an interval, perhaps using the collection dates, or life of creator, etc. Otherwise, leave as template default "0000/0000".

```
<unitdate label="Inclusive Dates:" type="inclusive" encodinganalog="245$f"
certainty="approximate" normal="1978/2003" era="ce"
calendar="gregorian">circa 1978-2003</unitdate>
```

```
<unitdate label="Inclusive Dates:" type="inclusive" encodinganalog="245$f"
certainty="approximate" normal="1970/1979" era="ce"
calendar="gregorian">circa 1970s</unitdate>
```

```
<unitdate label="Inclusive Dates:" type="inclusive" encodinganalog="245$f"
certainty="approximate" normal="0000/0000" era="ce"
calendar="gregorian">undated</unitdate>
```

#### BULK DATES - OPTIONAL

Only used if most of the collection is dated within a narrower timeframe than listed in the Inclusive Dates. Delete the element from the TARO .xml template if not used. If used, ENCODINGANALOG, NORMAL, TYPE, ERA, and CALENDAR attributes are required.

#### Examples:

```
<unitdate label="Bulk Dates:" type="bulk" encodinganalog="245$g"
normal="1978/1990" era="ce" calendar="gregorian">1978-1990</unitdate>
```

#### ABSTRACT – WEBSITE REQUIRED

**<abstract>** Brief summary of the materials being described. This information will display in the search results page of TARO. TARO requires the ENCODINGANALOG attribute.

**Content Standards:** [3.1 Scope and Content \(Required\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](https://saa-ts-dacs.github.io/3.1-Scope-and-Content-Required-Describing-Archives-A-Content-Standard)

**Structure/Application:** [<abstract> Abstract | EADiva](#)

#### Examples:

`<abstract label="Abstract:" encodinganalog="520$a">`The Roscoe and O’Neta Cavitt Collection consists of documents, correspondence, financial records, minutes, meetings and conferences, photographs, news clippings, and press releases pertaining to the business and operations of the Houston Negro Chamber of Commerce. Also contained are personal files and records of Roscoe and O’Neta Cavitt.`</abstract>`

`<abstract label="Abstract:" encodinganalog="520$a">`Stanley Rothwell was a British physical culturist and educator best known as a writer, fitness model, bodybuilder, boxer, and wrestler. Rothwell wrote extensively about health and fitness, mining, war, philosophy, politics, and himself. The collection focuses on physical culture in British society from the mid-1920s to the 1950s through records documenting Rothwell’s personal art and writing, and physical culture careers. This collection comprises writings and notes, newspaper clippings, photographs, personal correspondence, and other printed material and ephemera.`</abstract>`

#### ID OF UNIT – WEBSITE REQUIRED

`<unitid>` Unique local identifier for the material being described. If the repository does not utilize a unique identifier, the 5-digit TARO file name may be used. COUNTRYCODE, REPOSITORYCODE (same as MAINAGENCYCODE in `<eadid>`), ENCODINGANALOG attributes are required. LABEL attribute value set at “Identification” in TARO .xml template but can be changed according to local practice.

**Content Standard:** [2.1 Reference Code \(Required\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](https://saa-ts-dacs.github.io)

**Structure/Application:** `<unitid>` ID of a Unit | EADiva

#### Examples:

`<unitid label="Accession number:" countrycode="US" repositorycode="US-txau" encodinganalog="099">`AR.Z.018`</unitid>`

`<unitid label="Identification:" countrycode="US" repositorycode="US-txaucat" encodinganalog="099">`catx-00061`</unitid>`

#### PHYSICAL DESCRIPTION - WEBSITE REQUIRED

`<physdesc>` Wrapper element that includes the extent and the physical/digital nature of the materials being described. LABEL attribute set to the preferred “Quantity” but can be changed according to local practice. ENCODINGANALOG attribute required.

**Content Standard:** [2.5 Extent \(Required\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](https://saa-ts-dacs.github.io)

**Structure/Application:** [<physdesc> Physical Description | EADiva](#)

**EAD3 Notes:** EAD3 will make this element significantly more structured. Those who wish to record formally structured elements of physical description to enable consistent machine processing and data exchange will want to use <physdescstructured> instead of <physdesc>.

EXTENT – WEBSITE REQUIRED (CHILD ELEMENT OF <PHYSDESC>)

**<extent>** Child element of <physdesc> used to encode information about the quantity of materials described or an expression of the physical space they occupy.

**Structure/Application:** [<extent> Extent | EADiva](#)

**EAD3 Notes:** deprecated in EAD3, <quantity> will become a required child element of <physdescstructured>.

**Examples:**

```
<physdesc label="Quantity:" encodinganalog="300$a"><extent>1.2 linear feet</extent> </physdesc>
```

```
<physdesc label="Quantity:" encodinganalog="300$a"><extent>1.2 linear feet</extent> (<extent>3 boxes</extent>); <extent>3.24 GB</extent> (<extent>1,256 digital files </extent>) </physdesc>
```

```
<physdesc label="Quantity:" encodinganalog="300$a"><extent>9 linear feet<extent> (<extent>approximately 19,000 photographs<extent>)</physdesc>
```

```
<physdesc label="Quantity:" encodinganalog="300$a"><extent>1.2 linear feet</extent> (<extent>3 boxes and 6 scrapbooks</extent>)</physdesc>
```

LANGUAGE OF THE MATERIALS— WEBSITE REQUIRED

**<langmaterial> and <language >** Wrapper and child element enumerating the languages represented in the materials being described. TARO requires LANGCODE (ISO 639-2 language code), ENCODINGANALOG attributes. SCRIPTCODE (ISO 15924 script code) is preferred but not required. Use separate <language > tags within <langmaterial> wrapper for each language represented.

**Content Standard:** [4.5 Languages and Scripts of the Material \(Required\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#)

**Structure/Application:** [<langmaterial> Language of the Material | EADiva](#); [<language > Language | EADiva](#)

**List of Language Codes:** [ISO 639-2 Registration Authority - Library of Congress \(loc.gov\)](#)

**Examples:**

```
<langmaterial encodinganalog="546$a" label="Language">
<language encodinganalog="041" langcode="eng">English</language>
</langmaterial>
```

```
<langmaterial label="Language:" encodinganalog="546$a">Majority of the
collection is in
<language langcode="eng" scriptcode="Latn">English</language> with some
<language langcode="spa" scriptcode="Latn">Spanish</language>
</langmaterial>
```

**REPOSITORY – WEBSITE REQUIRED**

**<repository>** Wrapper element describes the institution responsible for providing intellectual and physical access to the materials being described. Must include a <extref> link to the repository website. TARO requires the ENCODINGANALOG and XLINK attributes. The TARO .xml template is prepopulated with these values.

**Content Standards:** [2.2 Name and Location of Repository \(Required\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#)

**Structure/Application:** [<repository> Repository | EADiva](#)

**Examples:**

```
<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="
https://www.lib.utexas.edu/about/locations/benson">
<corpname><subarea>Benson Latin American Collection</subarea>, The University
of Texas at Austin</corpname>
</repository>
```



## COLLECTION DETAILS

### BIOGRAPHICAL OR ADMINISTRATIVE HISTORY – WEBSITE WARNING

**<bioghist>** Element provides historical and other descriptive information about the individual or agency that created the records. The goal of this element is to put the collection in historical context. Heading **<head>** may be changed to reflect if the information is about an individual or family (Biographical Sketch), an organization or business (Administrative History), or an artificial collection (Creator Note). If element is used, TARO requires the ENCODINGANALOG attribute. Paragraph tags **<p>** are required.

**Content Standard:** [2.7 Administrative/Biographical History \(Optimum\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#)

**Application/Structure:** [<bioghist> Biography or History | EADiva](#)

#### Examples:

```
<bioghist encodinganalog="545"><head>Biographical Sketch </head>
<p>Sigmund Joel Aronson was born on February 9, 1918 in Sour Lake, Texas, to
Bernhard and Leah Aronson. Aronson's family moved from....</p>
<p>Aronson had an avid interest in the theater arts and was a member of the
Austin Civic Theatre (now the ZACH Theatre). He served as ACT's
president....</p>
```

```
<bioghist encodinganalog="545"><head> Administrative History</head>
<p> Organized in 1866, New Hope Baptist Church is one of the oldest African
American churches in Waco, Texas... </p>
<p> After the end of the American Civil War, emancipation came to the African
American people in the Waco community. Though the enslaved people of the
area had been allowed limited worship opportunities at First Baptist Church of
Waco, the newly liberated people of the community looked to form their own
church.....</p>
```

```
<bioghist encodinganalog="545"><head>Creator Note</head>
<p>This project was first conceived by Gloria Espitia, Mexican American
Neighborhood Liaison at the Austin History Center, in 2008, in an effort to
educate and promote the importance of preserving,... </p>
<p>Between 2008 and 2010, materials were collected through the auspices of
the Austin History Center in conjunction with a 5 month exhibit at the
AHC....</p>
```

### SCOPE AND CONTENT – WEBSITE WARNING

**<scopecontent>** Element documents the type, nature, date, and approximate number of materials to help a researcher judge the collection's potential relevance. Describe and analyze the substance of the records in a narrative format highlighting materials that

have significant research value. If element is used, TARO requires the ENCODINGANALOG attribute. Paragraph tags <p> are required.

**Content Standards:** [3.1 Scope and Content \(Required\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#)

**Structure/Application:** [<scopecontent> Scope and Content | EADiva](#)

**Examples:**

```
<scopecontent encodinganalog="520$b">
<head>Scope and Contents</head>
<p>The [Waco] New Hope Baptist Church records begin in 1875 and ends in 1986.
The Literary Productions series is by far the largest....</p>
```

#### ARRANGEMENT – WEBSITE OPTIONAL

**<arrangement>** Element describes the overall organization of the collection if the materials have been subdivided into smaller units such as series either by the creator (original order) or the archivist (imposed order). Local practice dictates if this is displayed in a narrative or list format. If element is used, TARO requires the ENCODINGANALOG attribute. Paragraph tags <p> are required.

**Content Standards:** [3.2 System of Arrangement \(Added Value\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#)

**Structure/Application:** [<arrangement> Arrangement | EADiva](#)

**Examples:**

```
<arrangement encodinganalog="351$b" id="a5">
<head>Arrangement</head>
<p><list type="simple"><head>Collection is arranged into five series:</head>
<item>Steering Committee</item>
<item>Correspondence</item>
<item>Press Releases and Publicity</item>
<item>Projects and Community Issues</item>
<item>Other Civil Rights/LGBTQ Organizations</item>
</list>
</p>

<arrangement encodinganalog="351$b">
<head>Arrangement</head>
<p>Currently, the collection is arranged in five series: I. Correspondence, II. Legal Documents, III. Financial Documents, IV. Literary Productions, and V. Photographic Materials.</p>
```

## COLLECTION RESTRICTIONS

### ACCESS RESTRICTIONS – WEBSITE WARNING

**<accessrestrict>** Information about conditions that affect the availability of the materials being described due to the nature of the information in the collection, the physical nature of the materials, or the restrictions imposed by the donor, the repository, or statutory/regulatory requirements. If element is used, TARO requires the ENCODINGANALOG attribute. Paragraph tags <p> are required.

**Content Standard:** [4.2 Physical Access \(Added Value\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#)

**Structure/Application:** [<accessrestrict> Conditions Governing Access | EADiva](#)

**EAD3 Notes:** In EAD3, <accessrestrict> loses child elements <address>, <legalstatus>, and <note>. TARO users may want to discontinue use of these elements.

#### Examples:

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

```
<accessrestrict encodinganalog="506">
<head>Access Restrictions</head>
<p>Birth records in this collection are subject to Texas Senate Bill 861 which restricts
all birth records for 75 years.</p>
</accessrestrict>
```

### USE RESTRICTIONS – WEBSITE WARNING

**<userrestrict>** Information about restrictions on reproduction and/or publication, after access has been provided. (Use <accessrestrict> for restrictions on access.) Restrictions may be based on copyright, donor restrictions, or repository policy. If element is used, TARO requires the ENCODINGANALOG attribute. Paragraph tags <p> are required.

**Content Standard:** [4.4 Conditions Governing Reproduction and Use \(Added Value\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#)

**Structure/Application:** [<userrestrict> Conditions Governing Use | EADiva](#)

**EAD3 Notes:** In EAD3, <userrestrict> loses child elements <address> and <note>. TARO users may consider discontinuing use of these elements.

#### Examples:

```
<userrestrict encodinganalog="540">
<head>Use Restrictions</head>
<p> There are no use restrictions on this collection. Publisher is responsible for
complying with copyright law.</p>
</userrestrict>
```

```
<userrestrict encodinganalog="540">
<head>Use Restrictions</head>
<p> Documents containing personal information are restricted due to privacy
concerns during the lifetime of individuals mentioned in the documents. At the
request....</p>
</userrestrict>
```

### PHYSICAL CHARACTERISTICS AND TECHNICAL REQUIREMENTS – WEBSITE OPTIONAL

**<phystech>** Description of important physical conditions or technical requirements that affect the storage, preservation, or use of the materials described. If element is used, TARO requires the ENCODINGANALOG attribute. Paragraph tags <p> are required.

**Content Standard:** [4.2 Physical Access \(Added Value\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#) and [4.3 Technical Access \(Added Value\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#)

**Structure/Application:** [<phystech> Physical Characteristics and Technical Requirements | EADiva](#)

**EAD3 Notes:** In EAD3, <phystech> loses child elements <address> and <note>. TARO users may want to discontinue use of these elements.

#### Examples:

```
<phystech encodinganalog="340" >
<head>Physical Characteristics or Technical Requirements</head>
<p> Collection is housed in the UNT Music Library. Advance notice for use is
required. Please contact the Music Library for further information. <p>
</phystech>
```

```
<phystech encodinganalog="340">
<head>Physical Characteristics</head>
<p>Forty-eight hours' advance notice is required for access because drawings
are rolled and need to be relaxed before viewing. Please consult the
Architectural Archives Archivist for more details.</p>
</phystech>
```

## ACQUISITION AND ADMINISTRATIVE INFORMATION

Information about appraisal, custodial history, administrative interventions, restrictions, reformatting, or any other activity that has the power to change users' understanding of records' content or context should be faithfully documented and presented to the user.

### PREFERRED CITATION — WEBSITE REQUIRED

**<prefercite>** Specification on how users should cite the collection. TARO requires the ENCODINGANALOG attribute. Paragraph tags <p> are required.

**Content Standard:** [7.1 Notes \(Added Value\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#)

**Structure/Application:** [<prefercite> Preferred Citation | EADiva](#)

**EAD3 Notes:** In EAD3, <prefercite> loses child elements <address> and <note>. TARO users may want to discontinue use of these elements.

#### Examples:

```
<prefercite encodinganalog="524">
  <head>Preferred Citation</head>
  <p>[Photo Identification Number], Bank of the Southwest Collection of Frank
Schleuter Photographs; MSS 0100; Houston Metropolitan Research Center, Houston
Public Library.</p>
</prefercite>
```

### ACQUISITION INFORMATION — WEBSITE WARNING

**<acqinfo>** Immediate source of the materials being described. If method of acquisition is unknown, this can also be acknowledged. If element is used, TARO requires the ENCODINGANALOG attribute. Paragraph tags <p> are required.

**Content Standard:** [5.2 Immediate Source of Acquisition \(Added Value\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#)

**Structure/Application:** [<acqinfo> Acquisition Information | EADiva](#)

**EAD3 notes:** <acqinfo> will lose child elements <address> and <note>. TARO users may want to discontinue use of these elements. <acqinfo> will not nest within <custodhist>.

#### Examples:

```
<acqinfo encodinganalog="541">
  <head>Acquisition Information</head>
  <p>Transferred from Dr. Cady's possession in 1982.</p>
</acqinfo>
```

```
<acqinfo encodinganalog="541" id="a19">
  <head>Acquisition Information</head>
  <p>COA Department: Parks and Recreation Department</p>
  <p>Transfer Date: 2015</p>
</acqinfo>

<acqinfo encodinganalog="541">
  <head>Acquisition Information</head>
  <p>Information of acquisition method not available. </p>
</acqinfo>
```

### PROCESSING INFORMATION – WEBSITE WARNING

**<processinfo>** Information about accessioning, arranging, describing, and otherwise preparing the described materials. Use for basic information, additional details can be encoded at the series, sub-series, or file level in the <dsc>. If information is unknown, this can also be acknowledged. If element is used, TARO requires the ENCODINGANALOG attribute. Paragraph tags <p> are required.

**Content Standards:** [7.1 Notes \(Added Value\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#) and [8.1 Description Control \(Added Value\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#)

**Structure/Application:** [<processinfo> Processing Info | EADiva](#)

**EAD3 Notes:** <processinfo> will lose child elements <address> and <note>. TARO users may want to discontinue use of these elements. @type will change to @localtype, but current TARO functionality still uses @type, so this should not be changed yet.

### Examples:

```
<processinfo encodinganalog="583">
  <head>Processing Information</head>
  <p>Original donation arranged by Tim Wilder in 1991. Additions integrated,
  finding aid created and encoded by Mallori White in 2017.</p>
</processinfo>
```

```
<processinfo encodinganalog="583">
  <head>Processing Information</head>
  <p>Project numbers for sets of architectural drawings were generated in-
  house when the information was not provided by the creator. These numbers
  were created using the last 2 numbers of the year the drawings were created
  and then a sequential 2 digit number. For example: BAR-9801 (drawings were
  created in 1998 and this was the first set of unnumbered drawings).</p>
</processinfo>
```

**ACCRUALS – WEBSITE OPTIONAL**

**<accruals>** Information about anticipated additions to the materials being described. May provide specific details about the frequency and/or reason for additions. If element is used, TARO requires the ENCODINGANALOG attribute. Paragraph tags <p> are required.

**Content Standard:** [5.4 Accruals \(Added Value\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](https://saa-ts-dacs.github.io)

**Structure/Application:** [<accruals> Accruals | EADiva](#)

**EAD3 Notes:** <accruals> will lose child elements <address> and <note>. TARO users may want to discontinue use of these elements. @type will change to @localtype. Since @type is not required in EAD2002, TARO users may opt to omit this element in preparation for EAD3. TARO does not currently accept @localtype.

**Examples:**

```
<accruals encodinganalog="584"><head>Additions</head>
<p>The Austin Poetry Society donates administrative records, newsletters and
member anthologies on a regular basis.</p></accruals>
```

```
<accruals encodinganalog="584"><head>Additions</head>
<p>Additional department records deemed historic will be added as materials
reach the retention period as outlined by the department control
schedule.</p></accruals>
```

**ALTERNATIVE FORM AVAILABLE – WEBSITE WARNING**

**<altformavail>** Information about copies of the materials being described, if applicable. Most often used when the original is very fragile or in a format that is not easily accessible. If the element is used, TARO requires the ENCODINGANALOG attribute. Paragraph tags <p> are required. If the element is not relevant to your finding aid, do not use, and override the Website Warning when uploading the finding aid to TARO.

**Content Standard:** [6.2 Existence and Location of Copies \(Added Value\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](https://saa-ts-dacs.github.io)

**Structure/Application:** [<altformavail> Alternative Form Available | EADiva](#)

**EAD3 Notes:** In EAD3, <altformavailable> loses child elements <address> and <note>. TARO users may want to discontinue use of these elements.

**Examples:**

```
<altformavail encodinganalog="530"> >
<head>Alternative Form Available</head>
<p> Graduate Council meeting minutes, bylaws, and other records are available
electronically through the University of Texas at San Antonio website:
<extref xmlns:xlink="http://www.w3.org/1999/xlink" xlink:type="simple" xlink:a
ctuate="onRequest" xlink:show="new" xlink:href="http://www.utsa.edu/gradua
te/GraduateCouncil/index.html">http://www.utsa.edu/graduate/GraduateCoun
cil/index.html</extref>(Accessed April 2, 2009).</p>
</altformavail>
```

**LOCATION OF ORIGINALS – WEBSITE OPTIONAL**

**<originalsloc>** Information about the existence, location, availability, and/or the destruction of originals where the materials being described consist of copies. Paragraph tags `<p>` are required.

**Content Standard:** [6.1 Existence and Location of Originals \(Added Value\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#)

**Structure/Application:** [<originalsloc> Location of Originals | EADiva](#)

**EAD3 Notes:** In EAD3, `<originalsloc>` loses child elements `<address>` and `<note>`. TARO users may want to discontinue use of these elements.

**Examples:**

```
<originalsloc encodinganalog="535">
<head>Location of Originals</head>
<p> The materials in this collection are duplicates and photocopies. The original
materials are owned by the Southern Rural Welfare Association, Inc., and are on
loan to The Southern Historical Collection of the University of North Carolina at
Chapel Hill Library.</p>
</originalsloc>
```



## OTHER RESOURCES

### RELATED MATERIALS — WEBSITE WARNING

**<relatedmaterial>** Information about materials that are not physically or logically included in the material described in the finding aid but that may be of use to a researcher because of an association to the described materials, if applicable. Examples include materials in other collections, vertical files, etc. If the element is used, TARO requires the ENCODINGANALOG attribute. Paragraph tags <p> are required. If the element is not relevant to your finding aid, do not use, and override the Website Warning when uploading the finding aid to TARO.

**Content Standards:** [6.3 Related Archival Materials \(Added Value\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#)

**Structure/Application:** [<relatedmaterial> Related Material | EADiva](#)

#### Examples:

```
<relatedmaterial encodinganalog="544 1">
<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>
```

```
<relatedmaterial encodinganalog="544 1">
<p> See also the Helen Hargrave World War II Collection, 1941-1946 at the Dolph
Briscoe Center for American History, The University of Texas at
Austin.</p></relatedmaterial>
```

### SEPARATED MATERIAL — WEBSITE WARNING

**<separatedmaterial>** Information about materials associated by provenance to the described materials but that have been physically separated or removed, if applicable. These items may have been destroyed (including duplicates), moved to another area of the repository/another repository, or returned to the creator. If element is used, TARO requires the ENCODINGANALOG attribute. If the element is not relevant to your finding aid, do not use, and override the Website Warning when uploading the finding aid to TARO. Paragraph tags <p> are required.

**Structure/Application:** [<separatedmaterial> Separated Material | EADiva](#)

#### Examples:

```
<separatedmaterial encodinganalog="544 0">
  <head>Separated Material</head>
  <p>Published material have been added to the General Collection. See list of
call numbers below:</p>
</separatedmaterial>
```

#### OTHER FINDING AID – WEBSITE OPTIONAL

**<otherfindaid>** Allows for the listing of additional guides to the described materials, such as indexes or lists generated by the creator or compiler of the materials. Paragraph tags `<p>` are required.

**Content Standard:** [4.6 Finding Aids \(Added Value\) - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](https://saa-ts-dacs.github.io/4.6-Finding-Aids-Added-Value-Describing-Archives-A-Content-Standard/)

**Structure/Application:** [<otherfindaid> Other Finding Aid | EADiva](#)

**EAD3 Notes:** In EAD3, `<otherfindaid>` loses child elements `<address>`, `<extref>`, `<linkgrp>`, and `<note>`. TARO users may want to discontinue use of these elements.

#### Examples:

```
<otherfindaid encodinganalog="555">
  <p> Card files in the Benson Latin American Collection Rare Books and
Manuscripts describe the items in the collection.</p>
</otherfindaid>
```

#### BIBLIOGRAPHY – WEBSITE OPTIONAL

**<bibliography>** Citing works based on, about, or of special value to using the materials being described

**Structure/Application:** [<bibliography> Bibliography | EADiva](#)

#### Examples:

```
<bibliography encodinganalog="510" id="a10">
  <head>Bibliography</head>
  <bibref>
    <persname encodinganalog="100">Carter, Robert G. </persname>
    <title render="italic">On the Border with Mackenzie. </title>
    1935.
  </bibref>
</bibliography>
```

## SUBJECT TERMS

### CONTROLLED ACCESS HEADINGS – WEBSITE WARNING

**<controlaccess>** Wrapper element that designates key access points for the described materials and enables authority-controlled searching across finding aids. TARO strongly encourages repositories to use <controlaccess> elements in their finding aids. If you use <controlaccess> the ENCODINGANALOG and SOURCE attributes are required. The source attribute value can be a controlled vocabulary standard such as LCNAF, or “local” if it is a term used locally by your repository.

Note: <controlaccess></controlaccess> must be used repeatedly as subelements nested within an overall <controlaccess></controlaccess> for each set of subelements identified by a <head>.

Historically TARO has placed periods at the end of all <controlaccess> terms. In 2021, Standards Subcommittee, in consultation with the TARO grant funded Metadata Analyst, decided to end the practice of placing periods at the end of <controlaccess>, unless the last word is an abbreviation.

Assign as many controlled access points as needed to represent the names, topics, places, etc., that are determined to be significant in the collection. Controlled subheadings, such as those approved for use with Library of Congress (LOC) subject headings, may be added as needed, separated by a double hyphen -- (with no spaces between heading terms and hyphens).

The public-facing TARO website includes the ability to browse a limited list of subject and geographical terms. To help users to discover your collections, use these FAST subject terms when adding <controlaccess> elements. The list of browse terms is available online <https://txarchives.org/browse/subject>.

Where the FAST term differs from the LCSH or other thesauri used by your repository, consider adding the FAST term in addition to the one used under the cataloging standards for your repository. To suggest an addition to the list of browse terms, contact the TARO Steering Committee Chair and Vice-Chair. Additions will be reviewed on a semiannual basis by the Authorized Terms. The current list of Steering Committee members is available on [TARO Today](#).

For more information read the blog post on TARO Today: [Control Access Terms/Browse List release! | TARO Today \(utexas.edu\)](#)

**Content Standard:** [9 Archival Authority Records - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#); [10 Form of the Name - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#); [11 Description of the Person, Family, or Corporate Body - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#)

**Structure/Application:** [<controlaccess> Controlled Access Headings | EADiva](#)

**Examples:**

```
<controlaccess>
  <head>Index Terms</head>
  <controlaccess>
    <head>Personal Names</head>
    <persname encodinganalog="600" source="lcnaf">Houston, Sam, 1793-
1863</persname>
    <famname encodinganalog="600" source="local">Steinfeldt
family</famname>
    <persname encodinganalog="700" source="local">Steinfeldt, John
M.</persname>
  </controlaccess>
  <controlaccess>
    <head>Organizations</head>
    <corpname source="local" encodinganalog="610">San Antonio College of
Music</corpname>
  </controlaccess>
  <controlaccess>
    <head>Subjects</head>
    <subject encodinganalog="650" source="local">Composers--Texas--San
Antonio</subject>
    <subject encodinganalog="650" source="lcsb">Music--Texas--San
Antonio</subject>
  </controlaccess>
</controlaccess>
```

## CHILD ELEMENTS OF CONTROLLED ACCESS HEADINGS

Several child elements exist, including

- <persname>
- <corpname>
- <famname>
- <subject>
- <geogname>
- <genreform>
- <function>
- <occupation>
- <title>

**Content Standard:** [9 Archival Authority Records - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#); [10 Form of the Name - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#); [11 Description of the Person, Family, or Corporate Body - Describing Archives: A Content Standard \(saa-ts-dacs.github.io\)](#)

**Structure/Application:** [<controlaccess> Controlled Access Headings | EADiva](#)

**Examples:**

`<persname> encodinganalog="600" or "700"`

At the very least, this should be the creator of the collection if the creator is an individual. Also list the names of people whose papers form part of the collection. Additionally, index the names of people who are important subjects of the collection, including major correspondents. Add birth and death dates if known.

```
<controlaccess>
<head>Persons</head>
<persname source="local" encodinganalog="700">Brackenridge, George
Washington, 1832-1920</persname>
<persname source="local" encodinganalog="600">Bode, Mary Jane</persname>
<persname source="lcnaf" encodinganalog="600"> Hobby, Oveta Culp, 1905-
1995–Photographs</persname>
<persname source="lcnaf" encodinganalog="700">Navarro, José Antonio, 1795-
1871–Correspondent
</controlaccess>
```

`<corpname> encodinganalog="610" or "710"`

Names of businesses, corporations, agencies, etc. with major representation in the collection. At the very least, this should be the creator if the creator is an organization.

```
<controlaccess>
<head>Organizations</head>
<corpname source="local" encodinganalog="610">San Antonio College of
Music</corpname>
<corpname source="lcnaf" encodinganalog="710">American Red
Cross</corpname>
<corpname source="lcnaf" encodinganalog="610">Philosophical Society of
Texas</corpname>
<corpname source="lcnaf" encodinganalog="710">Waco (Tex.). Parks and
Recreation Department</corpname>
</controlaccess>
```

```

<famname> encodinganalog="600"
<controlaccess>
  <head>Personal Names</head>
  <famname encodinganalog="600" source="local">Steinfeldt
family</famname>
</controlaccess>

```

```

<subject> encoding analog="650"
<controlaccess>
  <head>Subjects</head>
  <subject encodinganalog="650" source="lcsht">Composers--Texas--San
Antonio</subject>
<subject encodinganalog="650" source="lcsht">Music--Texas--San
Antonio</subject>
<subject encodinganalog="650" source="fast">American Civil War (United States
: 1861-1865</subject>
<subject encodinganalog="650" source="local">Native Americans</subject>
</controlaccess>

```

```

<geogname> encodinganalog="651"
<controlaccess>
<head>Places</head>
<geogname source="lcnaf" encodinganalog="651">Austin (Tex.)--Social
conditions</geogname>
<geogname source="lcnaf" encodinganalog="651">Texas--History--1846-
1950</geogname>
<geogname source="lcnaf" encodinganalog="651">Waco (Tex.)--Photographs<
geogname>
</controlaccess>

```

```

<genreform> encoding analog="655"
Types of materials being described.
<controlaccess>
<head>Document Types</head>
<genreform source="aat" encodinganalog="655">Administrative
records</genreform>
<genreform source="rbgenr" encodinganalog="655">Advertisements--Texas--
Houston </genreform>
<genreform source="aat" encodinganalog="655">Agendas</genreform>
<genreform source="aat" encodinganalog="655">Clippings</genreform>
<genreform source="aat" encodinganalog="655">Flash drives</genreform>
<genreform source="lctgm" encodinganalog="655">Tintypes</genreform>
</controlaccess>

```

## OTHER INFORMATION

### OTHER DESCRIPTIVE DATA – WEBSITE OPTIONAL

**<odd>** For recording additional information about the described materials that is not easily incorporated into one of the other named elements. Can be used instead of, or to replace, the **<note>** tag (deprecated in EAD3) for information that does not fit into any other element. Paragraph tags **<p>** are required.

**Structure/Application:** [<odd> Other Descriptive Data | EADiva](#)

#### Examples:

```
<odd>
  <head>Community Descriptors - the following are index terms generated by the
  donor:</head>
  <p>Terms generated by the donor:</p>
  <list type="simple">
    <item>Chicanos</item>
    <item>Chicanas</item>
  </list></odd>
```

## INVENTORY

### DESCRIPTION OF SUBORDINATE COMPONENTS – WEBSITE WARNING

**<dsc>** - wrapper element for subordinate components in the archival hierarchy (series, subseries, files, etc.) that make up the inventory of the collection. TYPE attribute is required. The TARO .xml template is prepopulated with the commonly used value “combined” for TYPE, which is used when the description of a series is followed immediately by a listing of the contents of that series. Other value options are: “analyticover,” “in-depth,” and “othertype.” See Structure/Application link below for further information.

**Structure/Application:** [<dsc> Description of Subordinate Components | EADiva](#)

#### Example:

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

#### COMPONENT LEVELS – WEBSITE WARNING (CHILD OF THE <DSC>)

**<c01> through <c12>** - the inventory is structured hierarchically from the broadest level of organization of the collection to successively narrower levels within the **<dsc>**. Each level is represented in the inventory by a numbered component level with **<c01>** at the broadest level, **<c02>** at the next level of specificity, and so on to the narrowest level of organization of the collection.

From one <c01> to a possible twelve <c12> nested levels. Do not use unnumbered <c> component tags. To accommodate for the TARO website display it is recommended that <c01> is used for series, subseries, or collection name. For a flat collection arrangement (only files), use <c01> tags to describe the entire collection and <c02> for file names.

Use the LEVEL attribute to assign the archival unit. No direct correlation exists between a particular component level and an archival unit (i.e., series does not = <c01>) even within a single collection. For example, <c02> could be assigned LEVEL "subseries" in one series and "file" in another series. Even within a single series the LEVEL can be assigned a different archival unit.

**Structure/Application:** [<c> Component | EADiva](#) and [<c01> to <c12> Components, first to twelfth level | EADiva](#)

**Examples:**

```
<c01 level="series"> Broadest level
  <c02 level="subseries"> Narrower level
    <c03 level="file"> Narrowest level</c03>
    <c03 level="file"> Narrowest level</c03>
    <c03 level="file"> Narrowest level</c03>
  </c02>
</c01>
```

**DESCRIPTIVE IDENTIFICATION (CHILD OF THE <DSC>)**

**<did>** Wrapper that encloses other elements that provide core information about the described material and is intended for brief statements of information. Within the component levels, certain elements are allowed inside the <did>, while other, more detailed elements must be placed outside the <did>. Commonly used elements in the inventory that are inside the <did> are

- <container>
- <unittitle>
- <unitdate>

Other elements include

- <unitid>
- <dao>
- <origination>
- <abstract>
- <physdesc>



- <physloc>
- <langmaterial>

**Structure\Application:** [<did> Descriptive Identification | EADiva](#) and [<container> Container | EADiva](#) and [<unittitle> Title of the Unit | EADiva](#) and [<unitdate> Date of a Unit | EADiva](#)

Examples:

### **<container>**

Contributes to locating the described materials by providing information about the type of container and identifying any sequential numbers assigned to containers. A TYPE attribute is required in all <container> elements, and this attribute value will be displayed on the TARO website. It is recommended that component tags used as headings (such as series or subseries heading) within the inventory not contain a <container> element, while each component tag that represents a portion of the materials being described should contain a <container> element.

Repositories may create their own list of possible TYPE attribute values for <container>, keeping in mind that no whitespace (space between characters) is allowed in this attribute value. The TYPE attribute value used needs to pair logically with the text entered in <container>. Two <container> elements may be used within a component tag to show a second level of container location.

Possibilities for a single container inventory include box, oversize-box, volume, reel, microfiche, map-case, audio, video, artifact. Inventories using two <container> elements within a component tag might use these combinations: box, folder; box, photo; map-case, folder. A TYPE attribute value can refer to a digital repository as well. It is at the discretion of each repository whether to capitalize the TYPE attribute value or not.

### **<unittitle>**

Series, subseries, file, or item name depending upon the level of organization being described. Generally, the title references the function/purpose of the materials being described.

### **<unitdate>**

Creation year, month, or day of the described materials. See <unitdate> in Collection Summary section for further details on expressing dates. Normalizing dates (making dates machine readable in the 0000/0000 format) not required at the <dsc> level.

```

<c01 level="series">
  <did>
    <unittitle>Steering Committee, </unittitle>
    <unitdate>1978-1990</unitdate>
  </did>
  <c02 level="subseries">
    <did>
      <unittitle>Financial records</unittitle>
      <unitdate>1980-1989</unitdate>
    </did>
    <c03 level="file">
      <did>
        <container type="Box">1</container>
        <container type="Folder">5</container>
        <unittitle>Monthly receipts and expenditures</unittitle>
        <unitdate>1980-1989</unitdate>
      </did>
    </c03>
    <c03 level="file">
      <did>
        <container type="Box">1</container>
        <container type="Folder">6</container>
        <unittitle>Fundraiser receipts and expenditures</unittitle>
        <unitdate>1980-1989</unitdate>
      </did>
    </c03>
    <c03 level="file">
      <did>
        <container type="Box">1</container>
        <container type="Folder">7</container>
        <unittitle>Secretary of State reports</unittitle>
        <unitdate>1986 December</unitdate>
      </did>
    </c03>
  </c02>
</c01>

```

#### MORE DETAILED ELEMENTS OUTSIDE THE <DID> - OPTIONAL

The following tags may be used at the series, subseries, and file level and must be placed outside the <did> element. These elements require the use of <p> tags.

- <scopecontent>
- <bioghist>
- <arrangement>
- <altformavail>

- <phystech>
- <originalsloc>
- <userrestrict>
- <odd>
- <accessrestrict>

**Examples:**

```
<c01 level="series">
  <did>
    <unittitle>Steering Committee, </unittitle>
    <unitdate>1978-1990</unitdate>
  </did>
  <scopecontent><p>The Steering Committee series
contains.....</p></scopecontent>
<c02 level="subseries">
  <did>
    <unittitle>Financial records, </unittitle>
    <unitdate>1980-1989</unitdate>
  </did>
  <odd><p>End-of-year financial reports are integrated into the meeting
minutes.... </p></odd>
```

## GENERIC ELEMENTS USED WITHIN FINDING AID

### INTERNAL AND EXTERNAL LINKING

#### EXTENDED REFERENCE

**<extref>** Linking element to reference electronic documents or images external to the EAD finding aid. To point to another location within the finding aid, use **<ref>**.

#### Attributes:

- SHOW - defines whether a remote resource that is the target of a link appears at the point of the link (embed), replaces the existing link (replace), or appears in a new window (new)
- ACTUATE - indicate when the link activates automatically (onload) or must be requested by the user (onRequest)
- HREF - the locator of the remote source such as the internet address

**Structure/Application:** [<extref> Extended Reference | EADiva](#)

**EAD3 Notes:** removed from EAD3. **<ref>** will be used to provide link to content that may be internal or external to the finding aid.

#### Examples:

```
<extref xmlns:xlink="http://www.w3.org/1999/xlink" xlink:type="simple"
xlink:show="new" xlink:actuate="onRequest"
xlink:href="https://texashistory.unt.edu/explore/partners/ASPL/#collecti
ons">Portal of Texas History</extref>
```

*Replace the yellow highlighted text with desired web address.*

#### REFERENCE AND POINTER

**<ref>** Internal linking element for movement from one place in the finding aid to another. Use with a TARGET attribute to establish a source for a link; the TARGET value must match the NAME value of the Anchor tag generated by the stylesheet for the HTML rendering of the file. For instance, each (usually level="series") in a file is assigned an Anchor tag in numerical order according to its position in the file. The first will be assigned, and so on. Use **<ref>** when the referenced object needs to be described.

**Structure/Application:** [<ref> Reference | EADiva](#)

**EAD3 Notes:** **<ref>** will be the tag that is used to provide a link to content that may be internal or external to the finding aid.

#### Example:

```
<arrangement encodinganalog="351">
<head>Organization of Collection</head>
<list type="simple">
<item><emph render="bold">
<ref target="ser1">Series 1. Organizational Files</ref>
</emph>
</item>
<item>1.1 Administrative</item>
<item>1.2 Correspondence</item>
<item><emph render="bold"><ref target="ser2">Series 2. Department
Files</ref></emph>
</item>
<item>2.1 Field Organizing</item>
<item>2.2 Legal Department</item>
<item>2.3 Research</item>
```

#### DIGITAL ARCHIVAL OBJECT

**<dao>** Linking element that uses the attribute HREF to connect the finding aid information to electronic representations of the described materials. The element allows digital representations including graphic images, audio or video clips, images of text pages, and electronic transcriptions of text to be incorporated in the finding aid.

#### Attributes are TARO required:

- SHOW - defines whether a remote resource that is the target of a link appears at the point of the link (embed), replaces the existing link (replace), or appears in a new window (new)
- ACTUATE - indicate when the link activates automatically (onload) or must be requested by the user (onRequest)
- HREF - the locator of the remote source such as the internet address
- TITLE - Information that serves as a viewable caption and appears when the mouse hovers over the link. Allows for improved accessibility (alt text needed as description for screen readers). If the attribute is not included in <dao> then an embedded image will not be embedded. The URL will display with the label "Link to digital object: [URL]"

**Structure/Application:** [<dao> Digital Archival Object | EADiva](#)

#### Examples:

This example will display as a URL users can read as text and click on. The new TARO site displays the text "Digital Archival Object" and includes the phrase "Link to digital object:" before the URL that is listed in the href.

```

<c02 level="item">
<did>
<container type="box"> SMS 01 </container>
<container type="folder"> 1 </container>
<container type="box"> DCD </container>
<unittitle>Nurses Home. Jeff Davis</unittitle>
<unitid countrycode="US" repositorycode="US-txham">MS236-
001</unitid>
<unitdate id="atom_579677_event" normal="1948/1948" era="ce"
calendar="gregorian">1948</unitdate>
<dao xlink:type="simple" xlink:role="master" xlink:actuate="onRequest"
xlink:show="embed" xlink:href="https://archiveslibrarytmcedu-
001a.s3.us-east-2.amazonaws.com/MS236/MS236-001.jpg"/>
</did>
<scopecontent>
<p>View of Jefferson Davis Hospital Nurses' Home, as well as the
courtyard, parking lot, cars, and passersby. The photograph was taken
from the rooftop of Jefferson Davis Hospital on Buffalo Drive.</p>
</scopecontent></c02>

```

This example will display as a hyperlinked phrase “view Contents” that users can click on. The new TARO site displays the text “Digital Archival Object” and includes the phrase “Link to digital object titled: View Contents” because this <dao> has that as a title.

```

<c02>
<did>
<container type="Box">1</container>
<unittitle>Assessment of Archaeological Resources in Certain Areas of the
Allens Creek Watershed, Austin County, Texas, ASR No. 1,
<unitdate>1974</unitdate></unittitle>
<dao xlink:type="simple" xlink:actuate="onRequest" xlink:show="new"
xlink:title="View Contents"
xlink:href="http://digital.utsa.edu/cdm/ref/collection/p15125coll8/id/35
8"/></did>
</c02>

```

## FORMATTING

### LIST

**<list>** Formatting element that contains a series of <items>. A <head> tag may be added. TARO prefers that the TYPE attribute be defined

TYPE attribute: Possible values are: simple, deflist, marked, and ordered. TARO prefers the use of list type “simple”.

Web display of all list types is governed by TARO.

**Structure/Application:** [<list> List | EADiva](#)

**Examples:**

```
<p><list type="simple">
<head>Arranged into 3 series:</head>
<item>Project Files</item>
<item>Architectural Drawings</item>
<item>General Correspondence</item>
</list></p>
```

**EMPHASIS**

**<emph>** Formatting element used to mark words or phrases which should be stressed or emphasized for linguistic effect. TARO requires the RENDER attribute. Options for RENDER value are: bold, bolddoublequote, bolditalic, boldsinglequote, boldsmcaps, boldunderline, doublequote, italic, nonproport, singlequote, smcaps, sub, super, and underline.

**Structure/Application:** [<emph> Emphasis | EADiva](#)

**Examples:**

```
<unittitle label="Title:" encodinganalog="245$a"><emph
render="italic">Vietnam to Austin: Restoring Community</emph> Exhibit
Collection</unittitle>
```

**TITLE**

**<title>** Encodes the formal name of a work listed in the finding aid. Format anything that would normally be italicized or underlined, such as titles of books, periodicals, and other titles, by enclosing the title within <title> tags. Set the RENDER attribute to "italic". Newspaper or magazine article titles are still enclosed in quotation marks (using <emph>) following accepted title punctuation practice.

**Exception:** The <titleproper> element in the <eadheader> may not contain a <title> element. Use the <emphasis> element with the RENDER attribute set to italics.

**Structure/Application:** [<title> Title | EADiva](#)

**Examples:**

```
<bibref>
A 741.5973 HU AA Sam Hurt,
```

```
<title render="italic">I'm Pretty Sure I've Got My Death-ray in Here  
Somewhere: An Eyebeam Book.</title>  
</bibref>
```

### SPECIAL CHARACTERS

Characters reserved for XML markup delimiters (ampersand, left angle bracket, and right-angle bracket) need to be replaced with the following entity references:

Character	Character Name	Type this string to render in XML
&	Ampersand	&amp;
<	Left angle bracket	&lt;
>	Right angle bracket	&gt;

For more information, look at [Entity References from the W3C XML Tutorial](#). Some XML authoring programs (e.g., Oxygen) provide a Character Map and allow the encoder to choose the desired special character from a chart.



## **APPENDIX A—REVISION HISTORY OF THE BEST PRACTICES GUIDELINES**

TARO’s original encoding guidelines were created in 2001 for the EAD 1.0 DTD standard and were updated in 2003 to conform to the EAD 2002 DTD standard. During TARO’s NEH planning grant period (September 2015 to August 2016), its Standards subcommittee wrote a revision of the guidelines to conform to the EAD 2002 Schema standard for TARO repositories to use starting in 2016, when TARO completed its conversion to that standard. Grant consultant Jodi Allison-Bunnell will create a version of these guidelines to conform to the EAD3 Schema standard, which TARO will convert to in the future.

In 2016, using guidance provided by documentation that other EAD consortia have made available online, especially the best practice guidelines published by the Online Archive of California, the Orbis Cascade Alliance Content Creation & Dissemination Program (for Archives West), and the Library of Congress, the BPG underwent a major revision. TARO Steering Committee co-chairs Amy Bowman and Amanda Focke provided invaluable input, as did TARO’s NEH grant project manager Leigh Grinstead and grant project consultant Jodi Allison-Bunnell. Minnie Rangel, who served as TARO’s technical support staff at the University of Texas Libraries, provided essential, expert guidance. Standards co-chair emeritus Donna Coates (2013-2015) helped in the planning stages of this document before her retirement from the Alexander Architectural Archives-UT Austin. Standards Subcommittee co-chairs, Carla Alvarez (UT Libraries - Benson Latin American Collection) and Rebecca Romanchuk (Texas State Library and Archives Commission), along with the assistance of the subcommittee members Maristella Feustle (University of North Texas), Cynthia Franco (Southern Methodist University), Molly Hults (Austin History Center), Benna Vaughan (Baylor University - Texas Collection) and Jeffry Warner (Rice University - Woodson Research Center), published Version 3 in 2016.

In 2021-2022, recognizing that TARO members were not utilizing the Best Practices Guidelines (BPG), the TARO Standards Subcommittee revamped the BPG to provide more linear guidance for encoding finding aids according to the new standards established by the 2020-2022 TARO redesign. Standards Subcommittee members Julianna Barrera-Gomez (The University of Texas at San Antonio), Molly Hults (Austin History Center), Matthew Richardson (Texas Medical Center Library), Elliot Williams (The University of Texas, Texas Digital Library) , Robert Weaver (Texas Tech University), Lisa Struthers (San Jacinto Museum of History), Susannah Broyles (Texas State University), and Kristi Nedderman (Dallas Municipal Archives), published Version 4 in 2022.

## APPENDIX B—CHANGES IN PRACTICE

### SPLIT FINDING AIDS

TARO initially limited the file size to 500 kilobytes (K) for finding aids uploaded to the server hosted by the University of Texas Libraries. If a member repository had a finding aid that exceeded the file size, the finding aid was divided into parts. This is no longer the case; as of April 2011, member repositories can contribute finding aids that exceed 500K. Member repositories are encouraged to discontinue the practice of splitting files.

### DESCRIPTION GROUP TAG

**<descgrp>** Wrapper element that exists solely to support formatting and presentation. Tag can ONLY wrap around the `acqinfo`, `processinfo`, and `prefercite` elements. The `<descgrp>` tag can only occur once. `<descgrp>` is deprecated (not included) in EAD3, so although it is allowed in TARO under the conditions outlined above, best practice is to stop using the tag.

### PERIODS WITH CONTROL ACCESS TERMS

Historically TARO has placed periods at the end of all `<controlaccess>` terms. In 2021, Standards Subcommittee, in consultation with the TARO grant-funded Metadata Analyst, decided to end the practice of placing periods at the end of `<controlaccess>`, unless the last word is an abbreviation.

### NOTE TAG

`<note>` - TARO is encouraging repositories to move away from using the `<note>` tag because it is deprecated (not included) in EAD3. Use more specific elements if possible.

Elements and Attributes highlighted in Orange are specifically required by the TARO website, and if missing will result in a failed upload to TARO. Element sub-attributes are included in a thick box outline		Elements and Attributes highlighted in Blue are highly preferred by the TARO website. A warning message will appear, but your finding aid will be displayed on TARO		Other elements with a Status indicating Required are required for conformance to the TARO EAD Best Practices Guidelines Version 4 (2022); however, only those highlighted orange are technically required for upload to the TARO website	
Elements and Attributes	Status	Repeatable?	MARC	Comments / Application notes	EAD3 migration notes
<?xml version="1.0" encoding="UTF-8"?>	Required	N		XML declaration, required to validate as XML.	DACS Version 2021.0.0.1
<ead>	Required	N		Outermost wrapping element for an EAD-encoded finding aid.	
xmlns="urn:isbn:1-931866-22-9"	Required	N			
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"	Required	N			
xsi:schemaLocation="urn:isbn:1-931866-22-9 ead.xsd"	Required	N			
relatedencoding="MARC21"	Required	N			
<eadheader>	Website Required; DACs Required	N		<a href="#">MARC 21 Format for Bibliographic Data</a> Wrapper element for information about the finding aid document, rather than the archival materials being described in the bulk of the finding aid.	
language="iso639-2b"	Required	N		Refers to the standard being used for language codes.	
findaidstatus="edited-full-draft"	Optional	N		Enter a descriptive term for the status of the finding aid. If using multiple words, use hyphens between them (no spaces allowed).	
audience="internal"	Required	N		Refers to the standard being used for script codes.	
scriptencoding="iso15924"	Required	N		Refers to the standard being used for authoritative date formats.	
dateencoding="iso8601"	Required	N		Refers to the standard being used for authoritative country codes.	
countryencoding="iso3166-1"	Required	N		Refers to the standard being used for authoritative organization code for the repository.	
repositoryencoding="iso15811"	Required	N		urn:arj:[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.]	<a href="#">DACS 2.1</a>
<eadid>	Website Required; DACs Required	N			
countrycode="US"	Website Required	N		Use uppercase "US" for TARO institutions located in the United States of America.	<a href="#">DACS 2.1</a>
mainagencycode=	Website Required	N		Encode your repository code supplied by the Library of Congress (must begin with uppercase "US-"). Ask the Library of Congress to establish a repository code if none exists. Repository codes and instructions for requesting a new code may be found on the Library of Congress MARC Code List for Organizations web page. <a href="http://www.loc.gov/marc/organizations/">http://www.loc.gov/marc/organizations/</a> .	<a href="#">DACS 2.1</a>
publicid=	Optional	N		Recommended practice is to encode a Formal Public Identifier (FPI) for the finding aid.	
identifier=	Optional	N		Recommended practice is to encode a machine-readable unique identifier for the finding aid.	
<filedesc>	Website Required	N		Wrapper element, must be included with <titleproper> element.	
<titlestmt>	Website Required	N		Wrapper element, must be included with <titleproper> element.	
<titleproper>	Website Required	N		Encode the <i>formal title</i> 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. Other EAD consortia use a second <titleproper> (with type="filing") as a <i>filing title</i> in abbreviated form to appear in consortia browsing lists (with proper names in indirect order to alphabetize by last name).	
<subtitle>	Optional	N		Usually formed as: An inventory of [creator] [record type] at the [repository]. This is also used to display the finding aid title.	
<author>	Website Warning; DACs Preferred	N		Encode the name of the person(s) or institution(s) responsible for the intellectual content of the encoded finding aid.	<a href="#">DACS 8.1.5</a>
<sponsor>	Website Warning	N	<a href="#">5.36</a>	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."	
<publicationstmt>	Website Warning	N		Wrapper element, must be included with <publisher> element.	

Elements and Attributes	Status	Repeatable?	IMARC	Comments / Application notes	EAD3 migration notes
<b>Elements and Attributes highlighted in Orange</b> are specifically required by the TARO website, and if missing will result in a failed upload to TARO. Element sub-attributes are included in a thick box outline					
<b>Other elements with a Status highlighted in Blue</b> are highly preferred by the TARO website. A warning message will appear, but your finding aid will be displayed on TARO					
<b>Elements and Attributes with a Status indicating Required</b> are required for conformance to the TARO EAD Best Practices Guidelines Version 4 (2022); however, only those highlighted orange are technically required for upload to the TARO website					
<b>Elements and Attributes</b>					
<a href="#">&lt;publisher&gt;</a>	Optional	Y		Encode the name of your repository.	
<a href="#">&lt;date&gt;</a>	Optional	Y		Encode the date the finding aid was published. If <date> element is used the following attributes are required.	
era="ce"	Optional				
calendar="gregorian"	Optional				
normal="	Optional			If you also use a "normal" attribute in this tag, the date format inside that attribute can be: "YYYY" or "YYYY/YYYY" or "YYYY-MM" or "YYYY-MM-DD", but it cannot be blank like this: ", " and it cannot have a simple run of unpunctuated numbers like this: normal="YYYYMMDD" or this: normal="YYYYMM". The range of years accepted as valid in EAD 2002 is -2999 (equates to 3000 BCE) through 2999 CE.	
<a href="#">&lt;profiledesc&gt;</a>	Optional	N		Wrapper element.	
<a href="#">&lt;creation&gt;</a>	Optional	N		Encode a statement about the encoding of the finding aid	
<a href="#">&lt;date&gt;</a>	Optional	Y		Encode the date of the <i>initial</i> encoding into EAD. If this element is used the following attributes are required.	DACS 8.1.5
era="ce"	Optional				
calendar="gregorian"	Optional				
normal="	Optional			If you also use a "normal" attribute in this tag, the date format inside that attribute can be: "YYYY" or "YYYY/YYYY" or "YYYY-MM" or "YYYY-MM-DD", but it cannot be blank like this: ", " and it cannot have a simple run of unpunctuated numbers like this: normal="YYYYMMDD" or this: normal="YYYYMM". The range of years accepted as valid in EAD 2002 is -2999 (equates to 3000 BCE) through 2999 CE.	
<a href="#">&lt;language&gt;</a>	Optional	N		Use one <language> tag to encode language(s) significantly represented in the text of the finding aid. Do not confuse this with the <langmaterial> tag, which is used to specify the language(s) significantly represented within collection materials.	Deprecated in EAD3. See EAD3 <languagedeclaration> for migration option.
<a href="#">&lt;language&gt;</a>	Optional	Y		Use as many <language> tags as necessary to encode languages predominantly represented in the text of the finding aid.	
langcode="eng"	Optional			English language is used here as an example	
scriptcode="Latin"	Optional	N		Script name must be capitalized to be Schema-compliant. The code for Latin script is used here to match with the example of the English language.	
<a href="#">&lt;describes&gt;</a>	Optional	N		Identifies the rules used in preparing the finding aid. TARO recommends the following wording/tagging: <describes>Finding aid based on DACS (<title render="italic">Describing Archives: A Content Standard</title>) Not mandatory in legacy finding aids if the descriptive rules used by the original author(s) are not known.	
<a href="#">&lt;revisiondesc&gt;</a>	Optional	N		Used to record information about significant changes or alterations that have been made to the encoded finding aid after its initial EAD encoding. It is not used to note minor changes such as correction of typos, spelling, etc. The revisions should be recorded as a series of <change> elements, each containing a <date> and an <item> element.	Deprecated in EAD3. See EAD3 <maintenancehistory> for migration option.
<a href="#">&lt;change&gt;</a>	Optional	Y		Wrapper that holds information about notable change to a finding aid; contains <date> and <item> elements. Use one <change> element set for each change described.	
<a href="#">&lt;date&gt;</a>	Optional	N		Date of change.	
era="ce"					
calendar="gregorian"					

Elements and Attributes		Status	Repeatable?	MARC	Comments / Application notes	EAD3 migration notes
<p>normal=</p> <p>Elements and Attributes highlighted in Orange are specifically required by the TARO website, and if missing will result in a failed upload to TARO. Element sub-attributes are included in a thick box outline</p> <p>Other elements and Attributes highlighted in Blue are highly preferred by the TARO website. A warning message will appear, but your finding aid will be displayed on TARO</p> <p>Elements with a Status indicating Required are required for conformance to the TARO EAD Best Practices Guidelines Version 4 (2022); however, only those highlighted orange are technically required for upload to the TARO website</p> <p>DACS Version 2021.0.0.1</p>						
<p>Elements and Attributes</p>						
<p>normal=</p>						
<p>Optional</p>						
<p>Brief narrative description of change.</p>						
<p><b>Close &lt;eadheader&gt;</b></p>						
<archdesc>	Website Required	N			Required wrapper element for website, element attributes for this tag are not required.	
level="collection   fonds   class   recordgrp   series   subfonds   subgrp   subseries   file   item   otherlevel"	Optional				Use one of the following terms in the attribute: "collection" "recordgrp" "series" "subgrp" "subseries" "otherlevel" The TARO encoding template defaults to "collection" but this may be changed to another term.	<a href="#">DACS Part I, Chapter 1</a>
type="inventory"	Optional				Use one of the following terms in the attribute: "guide" "inventory" "register" or "accession". The TARO encoding template defaults to "inventory" but this may be changed to another term.	
audience="external"	Optional					
<idid>	Website Required	N			Wrapper element for core information about the described collection/record group. <idid> may be used at the top-level <archdesc> or at any component level <cdx>	
<head>	Website Required	N			Recommended to use "Collection Summary" as the <head> contents.	
<repository>	Website Required; DACS Required	N			Wrapper element for the institution or agency responsible for providing intellectual access to the materials being described.	<a href="#">DACS 2.2</a>
label="Repository."					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.	
encodinganalog="852\$a"	Website Required					
<extref>	Website Required	N			Child of <repository> element.	
xmlns:xlink="http://www.w3.org/1999/xlink"	Website Required					
xlink:type="simple"	Website Required					
xlink:show="new"	Website Required					
xlink:actuate="onRequest"	Website Required					
xlink:href=	Website Required				Enter the URL for the repository web page that users should be directed to for more information about the repository.	
<originat>	Website Required; DACS "Required, if Known"	N			Creator. One of the child elements <pername>, <famname>, <corname> is required. If creator is unknown, TARO suggests using "Unknown" with the encoding analog "100"; source set to "local"	<a href="#">DACS 2.6 and Part II, Chapters 9-12</a> the child element <title> deprecated in EAD3
label="Creator."	Preferred				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.	
<pername>	One child required	Y				
<famname>	One child required	Y				
<corname>	One child required	Y				
encodinganalog=	Website Required				Enter as appropriate depending on whether <pername>, <famname>, <corname> is used.	
source=	Website Required				Enter authority source code.	
<subarea>	Optional	Y			Can occur within <corname> to indicate a secondary or subsidiary level within the organization name.	
<unititle>	Website Required; DACS Required	N			Encode the collection title, formulated according to DACS 2.3. Use one <unititle> tag.	<a href="#">DACS 2.3</a>
label="Title."	Preferred				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.	
encodinganalog="245"	Website Required; DACS Required	Y			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 <unititle>.	<a href="#">DACS 2.4</a>

Elements and Attributes highlighted in Orange are specifically required by the TARO website, and if missing will result in a failed upload to TARO. Element sub-attributes are included in a thick box outline		Elements and Attributes highlighted in Blue are highly preferred by the TARO website. A warning message will appear, but your finding aid will be displayed on TARO		Other elements with a Status indicating Required are required for conformance to the TARO EAD Best Practices Guidelines Version 4 (2022); however, only those highlighted orange are technically required for upload to the TARO website		Comments / Application notes		EAD3 migration notes	
label="Dates:"	Status	Repeatable?	MARC	IMARC	Comments / Application notes	EAD3 migration notes			
label="Dates:"	Preferred				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.				
encodinganalog="245\$f"	Website Required			<b>245\$f</b>					
type="Inclusive"	Website Required								
era="cg"	Website Required								
calendar="gregorian"	Website Required								
normal=	Website Required				If you also use a "normal" attribute in this tag, comply with the ISO 8601 standard for forming the date information. The date format inside this attribute can be: "YYYY" or "YYYY/YYYY" or "YYYY-MM" or "YYYY-MM-DD", but it cannot be blank like this: "7" and it cannot have a simple run of unpunctuated numbers like this: normal="YYYYMMDD" or this: normal="YYYYMM". The range of years accepted as valid in EAD 2002 is -2999 (equates to 3000 BCE) through 2999 CE.				
<unitid>	Optional	Y			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. Prior to 2017, when (Bulk) was added to the default label, repositories preceded the date text entry with "bulk" to differentiate it from the inclusive dates. If this element is used, the following attributes are required.				
label="Dates (Bulk):"	Preferred				Attribute value should be "bulk."				
encodinganalog="245\$g"				<b>245\$g</b>					
type="bulk"									
era="cg"									
calendar="gregorian"									
normal=					If you also use a "normal" attribute in this tag, the date format inside that attribute can be: "YYYY" or "YYYY/YYYY" or "YYYY-MM" or "YYYY-MM-DD", but it cannot be blank like this: "7" and it cannot have a simple run of unpunctuated numbers like this: normal="YYYYMMDD" or this: normal="YYYYMM". The range of years accepted as valid in EAD 2002 is -2999 (equates to 3000 BCE) through 2999 CE.				
<unitid>	Website Required; DACS Required	Y			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). If repository does not utilize a unique identifier the 5 digit TARO file name may be used (example: 00045)				
label="Identification:"	Preferred				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 unless a more specific value is appropriate, such as Accession No., OCLC Record No., Record Group No., etc.				
repositorycode=	Website Required				Must be in the same format as mainagencycode to be Schema-compliant. Specifies the ISO 15511 code for the institution that has custody of the materials described.				
countrycode=	Website Required				Provides the ISO 3166-1 code for the country in which the institution that has custody of the materials described is located.				
encodinganalog=	Website Required			<b>099</b>	Use 099 if the value is a local free-text call number. If using a value that correlates to another MARC field, use the appropriate field code, such as 001 for an OCLC Record Control Number.				
identifier=	Optional				A machine-readable unique identifier containing a value similar to the text in the <unitid> element.				
type=	Optional				May be used to indicate the system from which the <unitid> was derived, e.g., accessioning system, record group classification scheme, records retention scheduling system, etc.				
<abstract>	Website Required	N							<b>DACS 3.1 commentary</b>

Elements and Attributes highlighted in Orange are specifically required by the TARO website, and if missing will result in a failed upload to TARO. Element sub-attributes are included in a thick box outline		Elements and Attributes highlighted in Blue are highly preferred by the TARO website. A warning message will appear, but your finding aid will be displayed on TARO		Other elements with a Status indicating Required are required for conformance to the TARO EAD Best Practices Guidelines Version 4 (2022); however, only those highlighted orange are technically required for upload to the TARO website		EAD3 migration notes	
Elements and Attributes	Status	Repeatable?	MARC	Comments / Application notes	Comments / Application notes	Comments / Application notes	EAD3 migration notes
label="Abstract;"	Preferred			TARO's styleshet will supply this label attribute value by default if the repository does not enter a different value. Entering the default value is preferred practice.			
encodinganalog="520\$a"	Website Required		520\$a				
<physdesc>	Website Required; DACS Required	N					Continues in EAD3, but see new EAD3 element <physdescstructured> for migration alternative.
label="Quantity;"	Preferred			TARO's styleshet will supply this label attribute value by default if the repository does not enter a different value. Entering the default value is preferred practice.			
encodinganalog="300\$a"	Website Required	Y	300\$a				Deprecated in EAD3. See EAD3 <quantity> for migration option.
<extent>	Website Required; DACS Required	Y		Use as child of <physdesc>.			
<genreform>	Optional	Y		Use as child of <physdesc>.			
<physloc>	Optional	N					
<langmaterial>	Website Required	N		Wrapper element for <language> element.			
label="Language;"	Preferred			TARO's styleshet will supply this label attribute value by default if the repository does not enter a different value. Entering the default value is preferred practice.			
encodinganalog="546\$a"	Website Required	Y	546\$a				
<language>	Website Required	Y		Use as child of <langmaterial> element.			
lancode=	Website Required			Use three-letter ISO 639-2 language code.			
scriptcode=	Optional	N		Script name must be capitalized to be Schema-compliant. Use four-letter ISO 15924 script code.			
Close <did>.							
<bioghist>	Optional	Y	545	DACS Ch. 11 also applies			DACS 2.7
<head>				Child element of <bioghist>: Biographical Sketch, Organizational History, or as appropriate.			
<scopecontent>	Website Warning; DACS Required	Y	520\$b	If <scopecontent> is used the encodinganalog attribute is required.			DACS 3.1
<head>				Child element of <scopecontent>. Scope and Contents Note.			
encodinganalog="520\$b"							
<arrangement>	Optional	N	351				DACS 3.2
<head>				If not using this, delete this element from your template to avoid an upload error.			
<accessrestrict>	Website Warning; DACS Required	N	506	If <accessrestrict> is used the encodinganalog is required.			DACS 4.1
<head>				Restrictions on Access.			
encodinganalog="506"							
<userestrict>	Website Warning	N	540	If <userestrict> is used the encodinganalog is required.			DACS 4.4
<head>				Restrictions on Use.			
encodinganalog="540"							
<phystech>	Optional	N	340				DACS 4.3
<head>				Technical Requirements.			
<controlaccess>	Website Warning	Y		This is a wrapper tag for various index term elements, each type of which is also wrapped in a <controlaccess> element nested within this one. TARO2 encourages use of <controlaccess> for Subject browsing.			DACS Ch. 9 thru 13
<head>				Index Terms.			
<persname>	Preferred	Y		Correspondents (or) Other Names (or) Personal Names.			as above
<head>							
encodinganalog="700"	Required		700				
source=	Required			See list of allowed authorities for codes.			as above
<famname>	Preferred	Y		Family Names.			
<head>							
encodinganalog="700"	Required		700				
source=	Required			See list of allowed authorities for codes.			as above
<corpname>	Preferred	Y		Corporate Names (or) Organizations.			
<head>							
encodinganalog="710"	Required		710				
source=	Required	Y		See list of allowed authorities for codes.			as above
<corpname>	Preferred			Meeting Names.			
<head>							
encodinganalog="711"	Required		711				
source=	Required			See list of allowed authorities for codes.			as above
<persname>	Preferred	Y		Subjects (Persons).			
<head>							
encodinganalog="600"	Required		600				

Elements and Attributes		Status	Repeatable?	MARC	Comments / Application notes	EAD3 migration notes
source=		Required			See list of allowed authorities for codes.	
<familyname>		Preferred	Y		Subjects (Families).	as above
<head>						
encodinganalog="600"		Required		600		
source=		Required			See list of allowed authorities for codes.	
<corpname>		Preferred	Y		Subjects (Organizations).	as above
<head>						
encodinganalog="610"		Required		610		
source=		Required			See list of allowed authorities for codes.	
<corpname>		Preferred	Y		Subjects (Meetings).	as above
<head>						
encodinganalog="611"		Required		611		
source=		Required			See list of allowed authorities for codes.	as above
<subject>		Preferred	Y		Subjects.	
<head>						
encodinganalog="650"		Required		650		
source=		Required			See list of allowed authorities for codes.	as above
<geogname>		Preferred	Y		Places.	
<head>						
encodinganalog="651"		Required		651		
source=		Required			See list of allowed authorities for codes.	as above
<genreform>		Preferred	Y		Document Types.	
<head>						
encodinganalog="655"		Required		655		
source=		Required			See list of allowed authorities for codes.	as above
<occupation>		Optional	Y		Occupations.	
<head>						
encodinganalog="656"		Required		656		
source=		Required			See list of allowed authorities for codes.	as above
<title>		Optional	Y		Titles.	
<head>						
encodinganalog="630"		Required		630		
source=		Required			See list of allowed authorities for codes.	as above
<function>		Optional	Y		Functions.	
<head>						
encodinganalog="657"		Required		657		
source=		Required			See list of allowed authorities for codes.	
<relatedmaterial>		Website Warning	Y	544 1	DACS Ch.14 also applies Related Materials	DACS 6.3
<head>					This is a wrapper tag for various administrative information elements that follow.	
<desgrp>		Optional	N			
<prefercite>		Website Required; DACS "Added Value"	N	524		DACS 7.1.5
<head>					Preferred Citation.	
encodinganalog="524"						
<acinfo>		Website Warning	N	541	If <acinfo> is used the encodinganalog is required. Accession Information.	DACS 5.2
<head>						
encodinganalog="541"		Website Warning	N	583	If <processinfo> is used the encodinganalog is required. Processing Information.	DACS 8.1.5
<processinfo>						
<head>						
encodinganalog="583"		Website Warning	N	530	Other Forms Available.	DACS 6.2
<altformavail>						
<head>						
encodinganalog="583"		Optional	N	583	Appraisal Information.	DACS 5.3
<appraisal>						
<head>						
encodinganalog="584"		Optional	N	584	Accruals.	DACS 5.4
<accruals>						
<head>						
encodinganalog="544 0"		Website Warning	N	544 0	Separated Material.	
<separatedmaterial>						
<head>						
encodinganalog="510"		Optional	N	510	Bibliography.	
<bibliography>						
<head>						
encodinganalog="500"		Optional	N	500	Index.	
<index>						
<head>						
encodinganalog="500"		Optional	N	500	Form heading as appropriate.	
<codd>						
<head>						



Elements and Attributes highlighted in Orange are specifically required by the TARO website, and if missing will result in a failed upload to TARO. Element sub-attributes are included in a thick box outline			
Elements and Attributes highlighted in Blue are highly preferred by the TARO website. A warning message will appear, but your finding aid will be displayed on TARO			
Other elements with a Status indicating Required are required for conformance to the TARO EAD Best Practices Guidelines Version 4 (2022); however, only those highlighted orange are technically required for upload to the TARO website			
Elements and Attributes	Status	Repeatable?	IMARC
<desc>	Website Warning	N	Comments / Application notes
type=			If <desc> is used the type attribute is required. A wrapper element that bundles information about the hierarchical arrangement of the materials being described. The <desc> element surrounds all other (subordinate) elements in the Description of Component Parts section of the finding aid. A single <desc> 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.
<col1>	Optional	Y	Value is in-depth, combined, analytical/cover, other type (verify this attribute value and change to combined when combining multiple <desc> elements)
level=	Optional		Numbered <col1> through <col12> components are required; do not use the unnumbered <c> component. Nested <colx>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.
id=	Optional		Component levels should generally be subordinate to the level set in <archdesc>.
<idid>	Optional	N	For each <c> component with attribute level, series, id attributes may be added, for example: ser1, ser2, in numerical order to aid in encoding workflow, or another system of the repository's choosing.
<container>	Optional	Y	A required wrapper element that bundles other elements identifying core information about the described materials. Use one or more. If <col1> is above file level, then normally <container> will first be used at <col2> level, or lower.
type=	Optional		If <container> elements are used of two types: Box and Folder; in order to display the correct sequence of box and folder numbers, it is necessary to repeat the <container> element with attribute type=Box for each <container> with attribute type=Folder within that box.
<unitid>	Optional	N	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).
audience=	Optional	N	Required: Use "external" as the attribute value if the information in <unitid> is intended for public viewing. Recommended but not required: Use "internal" as the attribute value if the information in <unitid> is not intended for public viewing; be aware that the information will still be visible in the Raw XML online file.
<unitfile>	Optional	N	
<physdesc>	Optional	Y	
<extent>	Optional	N	
<scopecontent>	Optional	Y	
<arrangement>	Optional	N	
<head>	Optional	N	Arrangement or Organization, as appropriate
<prefercite>	Optional	N	Preferred Citation
<actinfo>	Optional	N	Accession Information
<callformavail>	Optional	N	Other Forms Available
<accessrestrict>	Optional	N	Restrictions on Access
<userrestrict>	Optional	N	Restrictions on Use
<physreel>	Optional	N	Technical Requirements
<head>			

Elements and Attributes highlighted in Orange are specifically required by the TARO website, and if missing will result in a failed upload to TARO. Element sub-attributes are included in a thick box outline			
Other elements with a Status indicating Required are required for conformance to the TARO EAD Best Practices Guidelines Version 4 (2022); however, only those highlighted orange are technically required for upload to the TARO website			
Elements and Attributes		Repeatable?	IMARC
Status	Comments / Application notes		EAD3 migration notes
Optional	Numbered <id> through <id2> components are required; do not use the unnumbered <c> component. Nested <id>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.	Y	DACS Version 2021.0.0.1
Optional	Component levels should generally be subordinate to the level set in <archdesc>.		
Optional	A required wrapper element that bundles other elements identifying core information about the described materials.	N	
Optional	Use one or more. Do not assign an ID attribute to <container> since doing so will prevent display of this element by TARO's stylesheet.	Y	
Optional	If <container> elements of two types are used, Box and Folder, in order to display the correct sequence of box and folder numbers, it is necessary to repeat the <container> element with attribute type=Box for each <container> with attribute type=Folder within that box.		
Optional	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).	N	<a href="#">DACS 2.1</a>
Optional	Required: Use "external" as the attribute value if the information in <unitid> is intended for public viewing. Recommended but not required: Use "internal" as the attribute value if the information in <unitid> is not intended for public viewing; be aware that the information will still be visible in the Raw XML online file.	N	
Optional	It is strongly recommended that titles be used at the component level, if a title is not provided because it has already been stated in a previous entry (and is meant to be "inherited" by succeeding entries), but dates are provided, a <unititle> element is not required; rather, it is acceptable to place the date(s) inside <unitdate>. E.g., for a series entitled "Correspondence", subseries titles are not required if "Correspondence" is assumed to apply to all entries in the series. Dates or date spans would be encoded in <unitdate> at the subseries level. To insure compliance with ISAD(G), do not nest <unitdate> inside <unititle>.	N	<a href="#">DACS 2.3</a>
Optional	Strongly recommended if a more specific creation date can be provided for a component than given in its parent description. Such entries provide a fuller description of a unit for researchers and improve searching by date. If multiple date ranges are present, each should be encoded with its own <unitdate>. If no date is available or applicable for a particular component, use the term "undated" inside the <unitdate> tags. Where no <unititle> content exists (or if a <unititle> is meant to be "inherited" by succeeding entries), but dates are provided, do not include a <unititle> element; instead, simply place the date(s) inside <unitdate>. To insure compliance with ISAD(G), do not nest <unitdate> inside <unititle>.	Y	<a href="#">DACS 2.4</a>