

Library of Congress
Encoded Archival Description
Best Practices

Presented by
EAD Practices Working Group

Washington, D.C. 2008

URL:<http://www.loc.gov/rr/ead/lcp/lcp.pdf>

Table of Contents

| | |
|--|-----|
| Introduction | 4 |
| Conventions | 5 |
| Practices | 7 |
| 2.1 Generic Text and Formatting Elements..... | 7 |
| 2.1.1 Heading..... | 8 |
| 2.1.2 Paragraph..... | 9 |
| 2.1.3 Note..... | 11 |
| 2.2 Linking Elements..... | 12 |
| 2.2.1 Internal Linking..... | 13 |
| 2.2.2 External Linking..... | 14 |
| 3.1 EAD Header..... | 18 |
| 3.1.1 Unique File Identifier..... | 21 |
| 3.1.2 File Description..... | 23 |
| 3.1.3 Profile Description..... | 25 |
| 3.1.4 Revision Description..... | 26 |
| 3.2 Title Page and Prefatory Matter..... | 27 |
| 3.3 Collection-Level Information (Archival Description)..... | 30 |
| 3.3.1 Basic Description: The High-Level <did>..... | 32 |
| 3.3.1.1 Title of the Unit..... | 35 |
| 3.3.1.2 Date of the Unit..... | 37 |
| 3.3.1.3 ID of the Unit..... | 40 |
| 3.3.1.4 Origination..... | 41 |
| 3.3.1.5 Physical Description..... | 44 |
| 3.3.1.6 Language of the Material..... | 46 |
| 3.3.1.7 Repository..... | 47 |
| 3.3.1.8 Abstract..... | 49 |
| 3.3.1.9 Note..... | 51 |
| 3.3.1.10 Physical Location..... | 52 |
| 3.3.1.11 Digital Archival Object Group..... | 53 |
| 3.3.2 Controlled Vocabulary Terms..... | 55 |
| 3.3.2.1 Use of Attributes in <controlaccess> Subelements..... | 57 |
| 3.3.2.2 Personal, Corporate, Family, and Geographic Names..... | 58 |
| 3.3.2.3 Form and Genre Terms..... | 60 |
| 3.3.2.4 Function and Occupation Terms..... | 61 |
| 3.3.2.5 Subjects and Titles..... | 62 |
| 3.3.2.6 Use of Grouped Controlled Vocabulary Terms..... | 63 |
| 3.3.2.7 Use of Controlled Vocabulary Outside of <controlaccess>..... | 68 |
| 3.3.3 Administrative Information..... | 69 |
| 3.3.3.1 Acquisition Information..... | 73 |
| 3.3.3.2 Custodial History..... | 74 |
| 3.3.3.3 Accruals..... | 75 |
| 3.3.3.4 Processing Information..... | 76 |
| 3.3.3.5 Appraisal..... | 79 |
| 3.3.3.6 Conditions Governing Use..... | 80 |
| 3.3.3.7 Conditions Governing Access..... | 82 |
| 3.3.3.8 Alternate Form of the Materials Available..... | 83 |
| 3.3.3.9 Preferred Citation of the Material..... | 86 |
| 3.4 Biographical Sketches and Agency Histories..... | 87 |
| 3.5 Scope and Content Note..... | 92 |
| 3.6 Arrangement..... | 94 |
| 3.7 Description of Subordinate Components..... | 96 |
| 3.7.1 What is a Component?..... | 102 |

| | |
|--|---------------------|
| 3.3.7.2 Unnumbered Versus Numbered Components..... | 106 |
| 3.3.7.3 Basic Description of Each Component..... | 107 |
| 3.3.7.3.1 Unit Title..... | 108 |
| 3.3.7.3.2 Unit Date..... | 109 |
| 3.3.7.3.3 Physical Description..... | 111 |
| 3.3.7.3.4 Abstracts..... | 112 |
| 3.3.7.3.5 ID Numbers..... | 113 |
| 3.3.7.3.6 Physical Location Information..... | 115 |
| 3.3.7.3.7 Container Information..... | 116 |
| 3.3.7.4 Expanded Description of Components..... | 122 |
| 3.3.8 Adjunct Descriptive Data..... | 127 |
| 3.3.8.1 Bibliographies..... | 128 |
| 3.3.8.2 File Plans..... | 131 |
| 3.3.8.3 Indexes..... | 132 |
| 3.3.8.4 Other Finding Aids..... | 136 |
| 3.3.8.5 Related Material..... | 137 |
| 3.3.8.6 Separated Material..... | 139 |
| 3.3.9 Other Descriptive Data..... | 141 |

Introduction

LC EAD Best Practices documents the practices and policies followed by the Library of Congress for the creation of its EAD finding aids. These guidelines draw on archival standards and procedures established by the Library and other archival institutions. Additions and changes are maintained by the Library's EAD Technical Team.

These practices are intended to be used with the [EAD Tag Library](#), published by the [Society of American Archivists](#) and the [Library of Congress](#). They conform with the [RLG Best Practice Guidelines for Encoded Archival Description](#) and the [EAD Application Guidelines \(Version 1.0\)](#).

Please direct questions or requests for information to the Library of Congress EAD Technical Team at llead@loc.gov.

Conventions

LC EAD Best Practices contains individually numbered sections — or "practices" — arranged according to the order of EAD 2002 elements found in the Library's archival finding aids. Each LC practice includes required and optional sections.

Required Sections:

- **Name**
The textual identifier for the practice. Usually an EAD element name.
- **Library of Congress Practice Number**
An LC-assigned number for the practice. Practice numbers reflect the EAD element order recommended by LC's guidelines and the *EAD 2002 DTD*. This number is displayed before each practice name.
- **Description**
A brief summary of the practice, including information on relevant EAD elements and their use by the Library (e.g., required or recommended). Fuller EAD element descriptions are available in the [EAD Tag Library](#).
- **Revision Date**
Date the practice was last revised. Provides version control for the practice.

Optional Sections:

- **Tag**
The predominant EAD elements discussed in the practice. EAD element names appear in angle brackets (for example, <[acqinfo](#)>).
- **See Also**
References to related LC practices. Note: *EAD Tag Library* references are not found in this section but are documented elsewhere in a practice, where appropriate.
- **Labels/Heads**
LC's recommended configurations for LABEL and HEAD attributes. LABEL provides consistent EAD displays across Library finding aids; HEAD helps both navigation and displays. An element (such as <[did](#)> subelements) may use the LABEL attribute or the element may include <[head](#)> as a subelement — both techniques, however, are never used for the same element.
- **Encoding Analog**
LC's recommended MARC 21 configurations for the ENCODINGANALOG attribute (LC uses on only MARC 21 mappings in ENCODINGANALOG). [Appendix A.3 of the EAD Tag Library](#) provides a crosswalk between MARC 21 and EAD. Note that, while MARC indicators and subfields may be optionally be supplied for EAD elements, the cost of doing so must be weighed against probable utility and the ability to include such information accurately in a template. Therefore, LC:
In ENCODINGANALOG, LC uses a single space to separate a numeric MARC tag from its indicators and MARC indicators from subfields. The graphic symbol # identifies blank or undefined indicators, and the graphic symbol \$ represents subfield delimiters. For example:
 - Provides specific MARC subfield(s) only when the element for which the encoding analog is given contains complete MARC subfield data (e.g., 260\$c for <[unitdate](#)>).
 - Does not list every MARC subfield in the element when the element contains an entire MARC field (e.g., 600 for <[persname](#)>).
 - Includes MARC indicators only when necessary to distinguish among elements. For instance, the encoding analog for <[relatedmaterial](#)> is 544 1, and the encoding analog for <[separatedmaterial](#)> is 544 0.
 - encodinganalog="222 #3 \$a"
(first indicator undefined; only one subfield)

- encodinganalog="245 04 \$abc"
(both indicators have values; multiple subfields)
- encodinganalog="544 1# \$3abcden"
(second indicator undefined; multiple subfields)
- **Other Attributes**
LC's recommended use and configuration of any relevant remaining attributes for EAD elements discussed in the practice. Note: the *EAD Tag Library* includes complete lists of all element attributes and their possible content, discussing each attribute at length in the "EAD Attributes" section. LC recommends:
 - Setting the NORMAL attribute for both `<date>` and `<unitdate>`. LC date normalization follows ISO 8601 in YYYYMMDD format.
 - Setting the SCRIPTCODE attribute for `<language>` within `<langusage>` and `<langmaterial>` using ISO 15924 only if non-Roman scripts need to be noted.
 - Using as SOURCE attribute values in `<controlaccess>` the terms found in the semiclosed list from the [EAD Tag Library \(Version 1.0\)](#): aat, aacr2, cdwa, dot, gmGPC, lenaf, lesh, lctgm, local, mesh, mim, ncarules, nmc, rad, rbgenr, tgn, ulan.
- **Subelements**
Child elements for the broader parent EAD elements found in the practice. For example, elements used within the wrapper element `<eadheader>` are listed as subelements. Subelements are listed in LC-prescribed order and include information on whether the Library requires or recommends their use. When necessary, subelements may be described in a separate LC practice.
- **Examples**
Illustrations of recommended LC markup for the practice. Each tagging example includes display examples that could be generated from the tagging markup, depending on output specifications. **For clarity, display examples do not include formatting features** (such as bold, italics, underlining, graphics, font, colors), although formatting is an essential component of EAD output stylesheets.
- **Comments**
Additional recommendations and discussions related to LC's implementation of the practice.
- **Repeatable**
A "yes/no" flag indicating whether an EAD element is repeatable. Also notes whether an element is recursive (may be used within itself, e.g., `<controlaccess>` within a broader `<controlaccess>`).
- **Order**
LC's recommended order for EAD elements discussed in the practice. Includes order recommendations between elements ("following `<userrestrict>` and preceding `<altformavail>`") as well as order within the parent element ("within `<descgrp>`").

Best Practice Guidelines

2.1 Generic Text and Formatting Elements

Description:

Use judgment in deciding when to place punctuation in an encoded document and when to let a style sheet supply the punctuation; see the Application Guidelines for further guidance.

Remember that finding aids viewed externally using a different style sheet or HTML encoding scheme may not supply the punctuation your internal style sheet does, and determine whether this is an acceptable risk. Also remember that if some finding aids include the punctuation and others supply by style sheet, it will be difficult to program the HTML transformation consistently to avoid double punctuation where it is already present.

If container lists are created in a database, it is more logical to assume that commas don't need to be included. If the document already exists in a word processing format, the commas are already present and extra work is required to strip them out. If in doubt, omit punctuation.

Subelements:

`<head>` See Section 2.1.1, Heading

`<p>` See Section 2.1.2, Paragraph

`<note>` See Section 2.1.3, Note

Tagging Example 1:

Whitespace outside the element for inline title element

```
<p>The publication of <title>A Walk in the Woods</title> in 1996 resulted in ...</p>
```

Display Of Tagging Example 1:

```
The publication of A Walk in the Woods in 1996 resulted in ...
```

Tagging Example 2:

Punctuation outside the element for inline emph element

```
<p>On the good ship <emph render="italic">Lollipop</emph>, life was easy.</p>
```

Display Of Tagging Example 2:

```
On the good ship Lollipop, life was easy.
```

Tagging Example 3:

Period included at end of inline title element as required by editorial practice

```
<p>Shirley Jackson wrote <title render="doublequote">The Lottery.</title></p>
```

Display Of Tagging Example 3:

```
Shirley Jackson wrote "The Lottery."
```

Comments:

- Put whitespace outside the element for inline element. See Example 1.
- Put punctuation outside the element for inline element. See Example 2.
- Include punctuation at end of inline element when editorial practice dictates. See Example 3.

Revision Date: 05/07/03

2.1.1 Heading**Tag:**

```
<head>
```

Description:

- Headings are used to identify blocks of text within a finding aid for display and navigation (where `<head>` is not available, the label attribute is used to identify text but not to aid in navigation).
- Heads always appear as the first subelement within a section of text, and should be used to ensure that a direct link to that section is included in the navigator or table of contents for the finding aid.
- Heads are not used within components in the `<dsc>`; in that instance, `<unittitle>` elements for components with LEVEL attribute set to "series" or "subseries" may be pulled into the navigation frame.

Tagging Example 1:

Heads provided for both Administrative Information Section and provenance paragraph

```
<descgrp type="admininfo">
  <head>Administrative Information</head>
  <acqinfo encodinganalog="541">
    <head>Provenance</head>
    <p>
      The papers of Susan Q. Archivista, archivist and philanthropist, were
      given to the Library of Congress by Josiah Quincy and Sally Rae
      Archivista in 1978. An addition to the collection includes items
      purchased by the Library in 1998.
    </p>
  </acqinfo>
</descgrp>
```

Display Of Tagging Example 1:

Heads provided for both Administrative Information Section and provenance paragraph

```
Archivista Papers          | Administrative Information
  *Collection Summary      |
  *Administrative Information | Provenance
    *Provenance            | The papers of Susan Q. Archivista,
                          | archivist and philanthropist, were
                          | given to the Library of Congress
                          | by Josiah Quincy and Sally Rae
```



```
| Archivista in 1978. An addition
| to the collection includes items
| purchased by the Library in 1998.
```

Display of heads in navigator illustrated: provenance head is subordinate to that for [<descgrp>](#)

Comments:

Headings are illustrated for each element for which they are valid.

Repeatable: no

Order: first element within any section where valid

Revision Date: 05/07/03

2.1.2 Paragraph

Description:

The paragraph element is an important structural element within EAD. It must be used within many elements before text can be inserted, and can be used to format text within those elements into one or multiple units. Within paragraph, many other elements are available for use within text, including reference and linking elements, formatting elements, controlled access elements, and some [<did>](#) subelements.

Tagging Example 1:

Paragraph used within [<separatedmaterial>](#); linking and controlaccess elements available within [<p>](#)

```
<separatedmaterial encodinganalog="544 0">
  <p>An extensive collection of additional Olmsted Associates
  records, including graphic material related to this collection, is
  located at the Frederick Law Olmsted National Historical Site in
  Brookline, Massachusetts. Records for the period 1870-1910 also are
  included in the Subject File of the <archref href="&eadmss.ms001019;" show="new"
  actuate="onload"><origination>Frederick Law Olmsted</origination>
  Papers</archref> in the Library of Congress.</p>
</separatedmaterial>
```

Display Of Tagging Example 1:

Paragraph used within [<separatedmaterial>](#); linking and controlaccess elements available within [<p>](#)

```
An extensive collection of additional Olmsted Associates records,
including graphic material related to this collection, is located at
the Frederick Law Olmsted National Historical Site in Brookline,
Massachusetts. Records for the period 1870-1910 also are included in
the Subject File of the Frederick Law Olmsted Papers in the Library of
Congress.
```

Tagging Example 2:

Less detailed tagging: published titles tagged with [<title>](#) and no attribute. Single and double quotes from keyboard used rather than [<title>](#) tagging for names of poems and [<emph>](#) for Hoosier poet.

```
<p>
James Whitcomb Riley was born in Greenfield, Indiana, and is known as
the "Hoosier poet." He was on the staff of the <title>Indianapolis
```

```
Journal,</title> 1877-1885, and his contributions to that newspaper
established his fame as a poet. Typescript poems in the papers include
"The Name of Old Glory," "The Lisper," "The Young Old Man," and "At
'The Literary.'"
</p>
```

Display Of Tagging Example 2:

Display is identical with that of Example 3

```
James Whitcomb Riley was born in Greenfield, Indiana, and is known as
the "Hoosier poet." He was on the staff of the Indianapolis Journal,
1877-1885, and his contributions to that newspaper established his
fame as a poet. Typescript poems in the papers include "The Name of
Old Glory," "The Lisper," "The Young Old Man," and "At 'The
Literary.'"

```

Tagging Example 3:

More detailed tagging: published titles tagged with `<title>` and render attribute. Double quotes from keyboard deleted in favor of `<title>` tagging for names of poems and `<emph>` for Hoosier poet.

```
<p>
James Whitcomb Riley was born in Greenfield, Indiana, and is known as
the <emph render="doublequote">Hoosier poet.</emph> He was on the staff of
the <title render="italic">Indianapolis Journal</title>, 1877-1885,
and his contributions to that newspaper established his fame as a
poet. Typescript poems in the papers include <title render="doublequote">
The Name of Old Glory,</title> <title render="doublequote">The
Lisper,</title> <title render="doublequote">The Young Old Man,</title> and
<title render="doublequote">At <emph render="singlequote">The Literary.</emph>
</title>
</p>
```

Display Of Tagging Example 3:

Display is identical with that of Example 2

```
James Whitcomb Riley was born in Greenfield, Indiana, and is known as
the "Hoosier poet." He was on the staff of the Indianapolis Journal,
1877-1885, and his contributions to that newspaper established his
fame as a poet. Typescript poems in the papers include "The Name of
Old Glory," "The Lisper," "The Young Old Man," and "At 'The
Literary.'"

```

Comments:

- Although paragraphs can be used in many places on their own, be sure to encode the text as specifically as is appropriate for consistency in display and retrieval. For example, you may need to use `<note><p>` rather than `<p>` alone.
- Titles (such as titles of published works) are among the data and elements found with paragraphs. By standard practice at LC and elsewhere, an encoded `<title>` displays as italic unless otherwise specified. See Example 2.
- Titles of unpublished works and other titles customarily given in double quotes may be handled in one of two ways: they need not be encoded as titles, and keyboarded double quotes ("") may be retained in the XML document. Single

and double quotation marks may be keyboarded in rather than using the Unicode numeric character references such as ' (left single quote) and ” (right double quote.) See Example 2.

- Alternately, one may explicitly encode `<title render="italic">` for published titles and `<title render="doublequote">` for unpublished or other quoted titles. See Example 3. Although the second alternative is most precise, it need not be considered if there is no anticipated use of the `<title>` tag for searching or building a browse list of titles.

Repeatable: yes

Revision Date: 05/24/04

2.1.3 Note

Tag:

`<note>`

Description:

The note element is available in many places as explanatory text. This element is used for supplementary data such as footnotes and should not be used when more specific elements are available.

See Also:

Section 3.3.1.9, Note (within high-level `<did>`) [Go To Section](#)

Encoding Analog: 500\$a

Other Attributes:

Use as appropriate when notes should appear as footnotes, endnotes, or linked notes:

- `actuate="onload"` or `"onrequest"`
- `type="footnote"` or `"endnote"`
- `show="embed"` or `"new"`

See Tag Library for full list of attributes and their values.

Subelements:

`<p>`

See Tag Library for full list of valid subelements.

Tagging Example 1:

Note is short explanatory text; no special display required

```
<c02 level="file">
<did>
<unittitle encodinganalog="245$a">Diary, author unknown</unittitle>
<note encodinganalog="500">
<p>
A study of this item in 1982 concluded that it came from the Shaker
community at Union Village, Ohio, and not Pleasant Hill.
</p>
</note>
</did>
</c02>
```

Display Of Tagging Example 1:

Note is short explanatory text; no special display required

Diary, author unknown
 A study of this item in 1982 concluded that it came from the Shaker community at Union Village, Ohio, and not Pleasant Hill.

Comments:

- The display of notes as footnotes or endnotes may be controlled by use of the ACTUATE and SHOW attributes which control linking behavior. Setting the TYPE attribute as "footnote" or "endnote" may facilitate the placement of the notes by the stylesheet used for printing.

Repeatable: yes

Revision Date: 05/07/03

2.2 Linking Elements**Description:**

There are seventeen elements in EAD that can be used to establish links: fifteen manage links directly, while two (<daogrp> and <linkgrp>) are wrapper elements that consolidate multiple, related links. Linking elements are discussed here under the general categories of internal links (with the EAD document) and external links (to other documents.)

See Also:

Section 2.2.1, Internal Linking [Go To Section](#)

Section 2.2.2, External Linking [Go To Section](#)

Subelements:

- <arc> See 2.2.1 Internal Linking and 2.2.2, External Linking
- <archref> See 2.2.2, External Linking
- <bibref> See 2.2.2, External Linking
- <dao> See 2.2.2, External Linking
- <daogrp> See 2.2.2, External Linking
- <daoloc> See 2.2.2, External Linking
- <extptr> See 2.2.2, External Linking
- <extptrloc> See 2.2.2, External Linking
- <extref> See 2.2.2, External Linking
- <extrefloc> See 2.2.2, External Linking
- <linkgrp> See 2.2.1, Internal Linking
- <ptr> See 2.2.1, Internal Linking
- <ptrloc> See 2.2.1, Internal Linking
- <ref> See 2.2.1, Internal Linking
- <refloc> See 2.2.1, Internal Linking

<resource> See 2.2.1 Internal Linking and 2.2.2, External Linking

<title> See 2.2.2, External Linking

Comments:

- Extensive information about linking can be found in Chapter 7 of the EAD Application Guidelines. Remember to check the EAD 2002 Tag Library for current values of attributes.

Revision Date: 05/01/08

2.2.1 Internal Linking

Description:

Internal linking enhances the ability to navigate a finding aid via explicit links between related information appearing in different places in the finding aid. Extensive information about linking can be found in Chapter 7 of the EAD Application Guidelines.

LC Practice requires the use of the TARGET, ACTUATE, and SHOW attributes with internal linking elements, and recommends the use of <ref> over <ptr> for internal linking.

See Also:

Section 3.3.8.3, Indexes [Go To Section](#)

Section 2.2.2, External Linking [Go To Section](#)

Other Attributes:

- target (value of id assigned to target of link) **Required**
- actuate="onrequest" (means user needs to click on link for target to be displayed) **Required**
- show="replace" (target is displayed in place of the text just viewed) **Required**

See Tag Library for full list of attributes and their values.

Subelements:

Simple linking within the finding aid:

<ref> (links with text)

<ptr> (empty links --no text) may be bundled using <ptrgrp>

Additionally, <indexentry> may be used within the index to bundle <ref>, <ptr>, or <ptrgrp>.

Extended linking within the finding aid (must be bundled using <linkgrp>)

<arc> (rules for traversal among resources in extended link)

<refloc> (locator links with text)

<ptrloc> (empty locator links --no text)

<resource> (local resource participating in extended link)

Tagging Example 1:

Cross-reference from Hart linked to target (Rodgers)

```
<c02 level="file">
<did>
```

```

<container type="box">135</container>
<unittitle encodinganalog="245$a">Hart, Lorenz <ref show="replace" actuate="onrequest"
target="rodgers176">See Container 176, Rodgers,
  Richard</ref>
</unittitle>
</did>
</c02>
<c02 level="file">
<did>
<container type="box">176</container>
<unittitle id="rodgers176" encodinganalog="245$a">Rodgers,
  Richard, and Lorenz Hart, <title>I Married an Angel,</title>
<unitdate encodinganalog="245$f" normal="1938" type="inclusive">[1938]</unitdate>
</unittitle>
</did>
</c02>

```

Display Of Tagging Example 1:

Cross-reference from Hart linked to target (Rodgers)

| | |
|---------|---|
| Box 135 | Hart, Lorenz See Container 176, Rodgers, Richard |
| Box 176 | Rodgers, Richard, and Lorenz Hart, I Married an Angel, [1938] |

Comments:

- All links must have targets. Set the TARGET attribute for a reference with a brief unique alpha or alphanumeric identifier for the object of the link; id's must begin with an alphabetic character. For example, a container list cross reference, "See Container 17, Smith, Anna" might have attribute target="smith17". To make the link work, set the attribute id="smith17" for the <unittitle> in Container 17 to which the link should go. See Example 1.
- See Section 3.3.8.3 for a discussion of <ptrgrp>, <ptr>, and <ref> in relation to indexes.
- See the Application Guidelines, 7.2.3 for an explanation of the extended linking and elements <refloc> and <ptrloc>. Remember to check the EAD 2002 Tag Library for new elements <arc> and <resource>, and for current values of attributes for linking elements.

Revision Date: 1/26/08

2.2.2 External Linking

Description:

External linking refers to links from a finding aid to another electronic resource, which may be another encoded finding aid, a digital archival object (<dao>), an external image or file not from the archival collection (e.g., the LC seal or an illustration), or a web page. Extensive information about linking can be found in Chapter 7 of the EAD Application Guidelines.

LC practice requires the use of the HREF, ACTUATE, and SHOW attributes with external linking elements.

See Also:

Section 2.1.2, Paragraph (use of linking elements within) [Go To Section](#)

Section 2.2.1, Internal Linking [Go To Section](#)

Section 3.1.2, File Description (<extptr> to LC seal) [Go To Section](#)

Section 3.3.1.11, Digital Archival Object Group [Go To Section](#)

Section 3.3.3.8, Alternate Form of the Materials Available (examples of <extref> to URLs, discussion of <daogrp>) [Go To Section](#)

Section 3.3.7.4, Expanded Description of Components (<daogrp> at component level) [Go To Section](#)

Section 3.3.8.1, Bibliographies (<bibref> and <archref> as linking elements) [Go To Section](#)

Section 3.3.8.5, Related Material (<bibref> and <archref> as linking elements) [Go To Section](#)

Section 3.3.8.6, Separated Material (<bibref> and <archref> as linking elements) [Go To Section](#)

Other Attributes:

Simple linking:

- href (target of link) **Required**
- actuate="onrequest" (means user needs to click on link for target to be displayed) or "onload" (means target displayed automatically, e.g., LC seal) **Required**
- show="new" (target resource displayed in a new browser window) or "embed" (target resource displayed at point of link) **Required**

See Tag Library for full list of attributes and their values.

Extended linking (<daoloc>):

- href (target of link) **Required**
- role (MIME type of target)

See Tag Library for full list of valid attributes and their values for this and for other extended linking elements.

Subelements:

Simple linking:

use <extptr> for the LC seal (in <eadheader>) or any illustrative matter which should be displayed inline and is not from the collection described

use <extref> for external links such as to a Library web page

use <archref> to link to other archival collections. For instance, this may be another finding aid (preferably EAD), or to a web page, database, or catalog record for the archival collection.

use <bibref> to link from a bibliographic citation to an online version of the work

use <title> to link to a title to an online version of the work

Extended linking:

use <arc> to specify rules for traversal among resources in an extended link

use <daoloc> for an object within <daogrp>. <daogrp> is used as a wrapper for one or more archival objects.

rather than using <dao> for a single archival object, use <daoloc> within <daogrp> instead..

use <extrefloc> for external reference extended references

use <extptrloc> for external pointer extended references

use <resource> to specify local resources participating in an extended link

Tagging Example 1a:

XML prolog with entity declarations, linking elements for Hannah Arendt Papers

```
<?xml version="1.0" encoding="utf-8"?>
<!DOCTYPE ead PUBLIC "-//ISBN 1-931666-00-8//DTD ead.dtd (Encoded Archival Description
(EAD) Version 2002)//EN" "http://lcweb2.loc.gov/xmlcommon/dtds/ead2002/ead.dtd"
[
<!ENTITY arendthome "http://memory.loc.gov/ammem/arendthtml/">
<!ENTITY eadmss.mhafol02 "http://memory.loc.gov/ammem/arendthtml/
mharendtFolderP02.html">
<!ENTITY eadmss.mhafol03 "http://memory.loc.gov/ammem/arendthtml/
mharendtFolderP03.html">
<!ENTITY lcseal SYSTEM "http://lcweb2.loc.gov/xmlcommon/lcseal.jpg" NDATA jpeg>
]>
<ead>[Beginning of EAD finding aid]</ead>
```

Tagging Example 1b:

`<daoloc>` has href value as an entity declared in prolog for Arendt

```
<c01 level="series">
  <did>
    <unittitle id="clcorr" encodinganalog="245$a">Correspondence,
      <unitdate encodinganalog="245$f" normal="1938/1976" type="inclusive">1938-1976</unitdate>
    </unittitle>
    <daogrp>
      <daoloc href="&eadmss.mhafol02;">
        <daodesc>
          <p>Items available online.</p>
        </daodesc>
      </daoloc>
    </daogrp>
  </did>
</c01>
```

Display Of Tagging Example 1b:

`<daoloc>` link goes to American memory presentation of series contents

```
Correspondence, 1938-1976
  Items available online.
```

Tagging Example 2a:

XML prolog with entity declarations and link to external 'bell.ent' entity file for Bell papers

```
<?xml version="1.0" encoding="utf-8">
<!DOCTYPE ead PUBLIC "-//ISBN 1-931666-00-8//DTD ead.dtd (Encoded Archival Description
(EAD) Version 2002)//EN" "http://lcweb2.loc.gov/xmlcommon/dtds/ead2002/ead.dtd"
[
<!ENTITY lcseal SYSTEM "http://lcweb2.loc.gov/xmlcommon/lcseal.jpg" NDATA jpeg>
<!ENTITY % links SYSTEM "bell.ent">
```



```
%links;

]>
<ead>[Beginning of EAD finding aid]</ead>
```

Tagging Example 2b:

Partial content of external 'bell.ent' entity file; handle registered for each entity

```
<!ENTITY eadmss.mb003001 "http://hdl.loc.gov/loc.mss/eadmss.mb003001">
<!ENTITY eadmss.mb004001 "http://hdl.loc.gov/loc.mss/eadmss.mb004001">
<!ENTITY eadmss.mb004102 "http://hdl.loc.gov/loc.mss/eadmss.mb004102">
<!ENTITY eadmss.mb005003 "http://hdl.loc.gov/loc.mss/eadmss.mb005003">
```

Tagging Example 2c:

Shows `<daoloc>` with href value an entity declared in external entity file for Bell

```
<c03 level="file">
  <did>
    <unittitle encodinganalog="245$a">Family
    correspondence</unittitle>
    <daogrp>
      <daoloc href="&eadmss.mb003001;">
        <daodesc>
          <p>Items available online.</p>
        </daodesc>
      </daoloc>
    </daogrp>
  </did>
</c03>
```

Display Of Tagging Example 2c:

`<daoloc>` link resolves via handle server to search results linking to contents of partially digitized folder

```
Family correspondence
  Items available online.
```

Comments:**EAD linking elements**

- Use the HREF attribute to set the target of the link from each linking element.
- Declare and use an entity for each link target rather than just embedding the URL in the HREF attribute of the linking element. For instance, in Example 1a, name the home page for the Hannah Arendt home page in American Memory as "arendthome". In the link from the `<daoloc>` in Example 1b, the name of the entity is preceded by an ampersand and followed by a semicolon. The entity declaration in the prolog (at the top of the finding aid) in Example 1a contains the information that the entity named "&arendthome;" is found at the URL "http://memory.loc.gov/ammem/arendhtml/".

XML prolog

- All finding aids should have information included in the XML prolog (the portion of the document which precedes the opening `<ead>` tag) in order to permit external linking. This information is included in the templates, and the full text of the prolog is provided in Examples 1a and 2a.

- The entity declaration, "<!ENTITY lseal SYSTEM ...>" enables linking to the LC seal, which is stored in the ITS file system and is displayed with every LC finding aid.
- If links are made to nine or fewer external entities, include the entity declarations in the document prolog. If there are ten or more entities, they will comprise a separate file to be stored in the same directory as the finding aid and its helper files, named with a .ent extension. See the EAD Technical Web page for further information on file structure and helper files.

Handles and external entities:

- If the target of a link is another EAD finding aid, a handle will be registered for the finding aid as part of standard procedures. See the EAD Technical Web page for an example of batch handle files for finding aids.
- If the target of a link is a stable web page, the entity declaration will include its URL, and there is no need to register a handle.
- If the target of a link is not a stable URL, for instance the response to a cgi-bin query, consider registering a handle. In Example 2b, handles should be registered for each entity, which would resolve to a URL that sends a search to InQuery, e.g., "http://lcweb2.loc.gov/cgi-bin/query/S?ammem/magbell:@field(DOCID+@range(magbell37500200+magbell37500299))".

Conversion from SGML to XML:

- In converting existing SGML finding aids to XML, processing instructions such as <?ATTLINK EXTPTR HREF URI> which were present in the SGML finding aids to enable external linking in the Panorama application have been converted to XML format in those finding aids, e.g. <?ATTLINK EXTPTR HREF URI?>. These instructions may be retained in a converted XML document; however, they should not be added to newly encoded finding aids.
- In the process of document conversion, the values of the declared entities are extracted from the declarations and appear as the value of the HREF attribute, and the entity declaration is no longer present (i.e., HREF="&arendthome;" will be changed to HREF="http://memory.loc.gov/ammem/arendthtml/".) This result for converted finding aids is acceptable, but newly encoded finding aids should continue to implement the practice described above concerning use of external entities.

Revision Date: 05/01/08

3.1 EAD Header

Tag:

<eadheader>

Description:

The <eadheader> comprises a set of metadata about the finding aid that serves to identify each EAD instance, and is based on the TEI header.

LC Practice requires the inclusion of <eadheader> and its subelements; <eadheader> and two of its subelements, <eadid> and <filedesc>, are required by the EAD DTD. Consistent formulation of its information is essential.

See Also:

Section 3.2, Title Page and Prefatory Matter [Go To Section](#)

Other Attributes:

- relatedencoding="MARC21" **Required**
- langencoding="iso639-2b" **Required**
- scriptencoding="iso15924" **Required**

- repositoryencoding="iso15511" **Required**
- countryencoding="iso3611-1" **Required**
- dateencoding="iso8601" **Required**

See Tag Library for full list of attributes and their values.

Subelements:

Listed in order required by DTD. Required elements must be included to conform with LC practice.

<eadid> **Required by DTD** See 3.1.1, Unique File Identifier

<filedesc> **Required by DTD** See 3.1.2, File Description

<profiledesc> **Required** See 3.1.3, Profile Description

<revisiondesc> **Required if applicable** See 3.1.4, Revision Description

Tagging Example 1:

Fully encoded <eadheader> element

```
<ead>
  <eadheader relatedencoding="MARC21" langencoding="iso639-2b" scriptencoding="iso15924"
  repositoryencoding="iso15511" countryencoding="iso3166-1" dateencoding="iso8601">
    <eadid countrycode="us" mainagencycode="dlc" identifier="hdl:loc.gov/loc.mss/eadmss.ms001004"
  encodinganalog="856$u">http://hdl.loc.gov/loc.mss/eadmss.ms001004</eadid>
    <filedesc>
      <titlestmt>
        <titleproper encodinganalog="245$a">Charles and Ray
  Eames Papers</titleproper>
        <subtitle>A Register of the Collection in the Library of
  Congress</subtitle>
        <author encodinganalog="245$c">Prepared by Margaret H. McAleer
  with the assistance of Thelma Follette, Lisa Madison, and
  Robert A. Vietrogoski</author>
      </titlestmt>
      <publicationstmt>
        <publisher encodinganalog="260$b">
          <extptr href="lcseal" show="embed" actuate="onload"/> Manuscript Division, Library of Congress
        </publisher>
        <address>
          <addressline>Washington, D.C.</addressline>
        </address>
        <date encodinganalog="260$c" normal="1995">1995</date>
      </publicationstmt>
      <seriesstmt>
        <titleproper>Registers of Papers in the Manuscript Division of
  the Library of Congress</titleproper>
      </seriesstmt>
    </filedesc>
    <profiledesc>
      <creation>Text converted and initial EAD tagging provided by
  Apex Data Services, <date normal="1999-01">January 1999;</date>
  encoding completed by Manuscript Division, <date normal="1999-11">November 1999</date></creation>
      <language encodinganalog="546">Finding aid written in <language langcode="eng"
  encodinganalog="041">English</language> and <language langcode="ita"
  encodinganalog="041">Italian</language>
    </language>
  </profiledesc>
```

```

<revisiondesc>
<change encodinganalog="583">
  <date normal="2000-04">2000 April</date>
  <item>Linked to digital content</item>
</change>
<change encodinganalog="583">
  <date normal="1999-11">1999 November</date>
  <item>Revised to EAD version 1</item>
</change>
</revisiondesc>
</eadheader>
</ead>

```

Display Of Tagging Example 1:

If header used to generate display, header should not be set to audience='internal'

```

                Charles and Ray Eames Papers
            A Register of the Collection in the Library of Congress

                Prepared by Margaret H. McAleer
            with the assistance of Thelma Follette, Lisa Madison,
                and Robert A. Vietrogoski

                Manuscript Division, Library of Congress
                Washington, D.C.

                [LC seal graphic]

                1995

```

Text converted and initial EAD tagging provided by Apex Data Services,
January 1999; encoding completed by Manuscript Division, November 1999

2000 April Linked to digital content
1999 November Revised to EAD version 1

Note: display of series statement and language code suppressed

Comments:

- The predominant practice for finding aids at the Library of Congress has used data from the `<eadheader>` to generate a title-page display, although some divisions had previously encoded a separate `<titlepage>` element in `<frontmatter>` in order to present elements in an order not permitted by the DTD.. LC HTML displays are generated from the `<eadheader>` rather than the `<titlepage>`. XSLT stylesheets can reorder the display of elements and insert textual formatting that need not be included in `<eadheader>`; such as the finding aid URL (EADID handle). However, the LC seal is still provided through a link within the `<publisher>` element in `<eadheader>`.
- Set the RELATEDENCODING analog both at the `<eadheader>` and `<archdesc>` levels, since different encoding schemes may be used for the two major sections in future.

Repeatable: no

Order: first element within `<ead>`

Revision Date: 05/06/08

3.1.1 Unique File Identifier

Tag:

<eadid>

Description:

The <eadid> is an element required by the DTD that includes a unique alphanumeric identifier for each separate EAD finding aid. The <eadid> for a finding aid remains constant no matter how many times the finding aid may be revised or expanded.

LC Practice requires the <eadid>, which should be formulated according to the scheme described below.

Encoding Analog: 856\$u

Other Attributes:

- countrycode="us" **Required**
- mainagencycode="dlc" **Required**
- identifier=LC handle preceded by "hdl:" (do not include the LC handle proxy server address "http://hdl.loc.gov") **Required**

Tagging Example 1:

<eadid> for the fourth Manuscript Division finding aid created in 2001

```
<eadheader>
  <eadid countrycode="us" mainagencycode="dlc" identifier="hdl:loc.gov/loc.mss/eadmss.ms001004"
  encodinganalog="856$u">http://hdl.loc.gov/loc.mss/eadmss.ms001004</eadid>
</eadheader>
```

Display Of Tagging Example 1:

<eadid> for the fourth Manuscript Division finding aid created in 2001

```
http://hdl.loc.gov/loc.mss/eadmss.ms001004
```

Note: display of <eadid> is usually suppressed in HTML and XML versions

Comments:

Assumptions:

- The <eadid> identifies the "work" (i.e., the intellectual content), whether fixed or dynamic in nature. Finding aids are by nature dynamic works; they can reflect additions to collections they describe, increased granularity of descriptions (especially with digital collections), and for encoded finding aids, increased levels of tagging.
- A new <eadid> is assigned only for a new work, not simply when the finding aid is updated.
- The <eadid> is a published identifier; it is not functionally similar to a PIN.
- Even if only part of a collection is initially processed and described, the EAD finding aid reflects the complete collection (in the header, scope and contents, etc.). The finding aid content should skeletally describe the complete collection and more completely describe the part of the collection being worked on. This should allow the finding aid to be expanded without requiring the <eadid> to change.

- If a finding aid is subdivided into physical parts, a unique <eadid> will not be assigned to each separate physical part (this whole/part information will be incorporated into "structural metadata" associated with EADs stored in a repository)

EAD ID structure:

- The Library of Congress bases its <eadid> practice on the persistent identifier naming scheme used for LC handles. The <eadid> is used by LC divisions when they register handles for finding aids.
- An LC <eadid> consists of two parts: the naming authority and the finding aid item identifier.
 - The **naming authority** identifies the LC division maintaining the finding aid (which may or may not be the LC division which created the finding aid). Because an LC <eadid> is also a persistent identifier, the naming authority is assigned at the time the <eadid> is created -- and will not change if the maintaining division changes its name. The naming authority is unique within LC. (Example: loc.pnp.eadpnp *or* loc.mss)
 - The finding aid **item identifier** is a two-part name. The first part is a stable "aggregate" name beginning with "ead." Each LC division uses the same aggregate name for all finding aids it maintains. (Example: eadrbc *or* eadmbrs). The second part is an eight-character number assigned by the maintaining division. This number is structured as follows: the first two characters (lower case) identify the maintaining division, the next three digits identify an abbreviated date of creation for the finding aid, and the last three digits are a one-up ID number assigned to finding aids created within that year (Example: ms001004 is the fourth finding aid created by the Manuscript Division in 2001).
- The content of the <eadid> contains an LC handle resolved through LC's handle proxy server (<http://hdl.loc.gov>). The actual LC handle is recorded in the <eadid> IDENTIFIER attribute.
 - Set the <eadid> IDENTIFIER attribute to the LC handle (Example: "hdl:loc.afc/eadafc.af999001"). RLG Best Practice Guidelines state that <eadid> should include at least one of the following attributes: PUBLICID, IDENTIFIER, or URL. URN has been added as an option in EAD 2002. However, because handles are not yet valid type of URN, LC believes that IDENTIFIER is the attribute best suitable for handles. ("URI" is not a valid attribute in EAD 2002).
 - Set the content of the <eadid> to the URL for the LC handle resolved through LC's handle proxy server (Example: <http://hdl.loc.gov/loc.afc/eadafc.af999001>)
 - Examples of <eadid> content are:
 - AFC: <http://lcweb.loc.gov/hdl/afc/eadafc.af999001>
 - General Collections: <http://hdl.loc.gov/loc.gdc/eadgdc.gc006001>
 - G&M: <http://lcweb.loc.gov/hdl/gmd/eadgmd.gm001001>
 - MBRS/MI: <http://hdl.loc.gov/loc.mbrsmi/eadmbrsmi.mi007001>
 - MBRS/RS: <http://lcweb.loc.gov/hdl/mbrsrs/eadmbrsrs.rs000001>
 - MSS: <http://lcweb.loc.gov/hdl/mss/eadmss.ms001028>
 - MUSIC: <http://lcweb.loc.gov/hdl/music/eadmusic.mu999001>
 - P&P: <http://lcweb.loc.gov/hdl/pnp/eadpnp.pp996001>
 - RBC: <http://lcweb.loc.gov/hdl/rbc/eadrbc.rb998001>
 - Other institutions and consortia assign <eadid> values using a variety of schemes. Many use the <eadid> PUBLICID attribute. EAD 2002 permits use of multiple types of identifiers; see Tag Library, <eadid>, for an example setting both PUBLICID and URL attributes.

Repeatable: no

Order: first element within <ead>

Revision Date: 05/01/08

3.1.2 File Description

Tag:

<filedesc>

Description:

Bibliographic information about the intellectual content of the encoded finding aid is bundled in the required element <filedesc>, in which elements such as the finding aid's title, subtitle, author, and publisher are encoded in a series of subelements.

LC Practice requires the inclusion of <filedesc>, which is a mandatory element required by the EAD DTD.

Subelements:

Listed in recommended order. Encoding analogs listed below are required.

<titlestmt> **Required by DTD**

<titleproper encodinganalog="245\$a"> **Required by DTD**

<subtitle>

<author encodinganalog="245\$c"> **Recommended**

<editionstmt>

<edition>

<publicationstmt> **Required**

<publisher encodinganalog="260\$b"> **Required**

<extptr> **Required**

<address> **Required**

<date encodinganalog="260\$c" normal="(ISO 8601 normalized date)"> **Required**

<seriesstmt>

<titleproper>

<num>

<notestmt>

<note>

Tagging Example 1:

File description including series statement

```
<filedesc>
  <titlestmt>
    <titleproper encodinganalog="245$a">Charles and Ray
    Eames Papers</titleproper>
    <subtitle>A Register of the Collection in the Library of
    Congress</subtitle>
```

```

<author encodinganalog="245$c">Prepared by Margaret H. McAleer
with the assistance of Thelma Follette, Lisa Madison, and Robert
A. Vietrogoski</author>
</titlestmt>
<publicationstmt>
  <publisher encodinganalog="260$b">
    <extptr href="lcseal" show="embed" actuate="onload"/>
    Manuscript Division, Library of Congress
  </publisher>
  <address>
    <addressline>Washington, D.C.</addressline>
  </address>
  <date encodinganalog="260$c" normal="1995">1995</date>
</publicationstmt>
<seriesstmt>
  <titleproper>Registers of Papers in the Manuscript Division of
the Library of Congress</titleproper>
</seriesstmt>
</filedesc>

```

Display Of Tagging Example 1:

Title display generated from file (series statement display suppressed)

```

          Charles and Ray Eames Papers
    A Register of the Collection in the Library of Congress

          Prepared by Margaret H. McAleer
    with the assistance of Thelma Follette, Lisa Madison,
          and Robert A. Vietrogoski

          [LC seal graphic]

    Manuscript Division, Library of Congress
          Washington, D.C.

          1995

```

Comments:

- Remember that the finding aid title may be different from the name of the collection.
- Each division should follow its own guidelines for the formulation of titles and in deciding whether series titles are to be used (for instance, the Manuscript Division has discontinued use of series titles). Finding aid titles may be formulated without subtitles, as is done by Music Division and American Folklife Division.
- Date normalization will follow ISO standard 8601. Follow this normalization standard also for <unitdate> elements normalized in the <did> and component levels.

Repeatable: no

Order: first element within <ead> following <eadid>

Revision Date: 05/01/08

3.1.3 Profile Description

Tag:

<profiledesc>

Description:

The <profiledesc> element bundles information about the creation of the encoded finding aid.

LC Practices requires the inclusion of <profiledesc>, as it establishes initial version control for the finding aid.

Subelements:

<creation> **Required**

<date> (set normal attribute) **Required**

<langusage encodinganalog="546"> **Required**

<language langcode="eng" encodinganalog="041"> **Required**

Set the SCRIPTCODE attribute for <language> using ISO 15924 only if nonroman script needs to be noted.

Tagging Example 1:

Creation description explicitly naming encoder/s; multiple languages in finding aid

```
<profiledesc>
  <creation>Finding Aid encoded by Morgan Cundiff and Paul Fraunfelter, <date normal="2001">2001</date>
</creation>
  <langusage encodinganalog="546">Finding aid written in
    <language langcode="eng" encodinganalog="041">English</language> and <language langcode="fre"
encodinganalog="041">French</language>
  </langusage>
</profiledesc>
```

Display Of Tagging Example 1:

Title display generated from creation description (language statement display suppressed)

```
Finding Aid encoded by Morgan Cundiff and Paul Fraunfelter, 2001
```

Tagging Example 2:

Finding aid initially encoded by vendor

```
<profiledesc>
  <creation>Text converted and initial EAD tagging provided by Apex
Data Services, <date normal="1999-01">January 1999;</date> encoding
completed by Manuscript Division, <date normal="1999-11">November
1999</date>
</creation>
  <langusage encodinganalog="546">Finding aid written in
    <language langcode="eng" encodinganalog="041">English</language>
  </langusage>
</profiledesc>
```

Display Of Tagging Example 2:

Finding aid initially encoded by vendor (language statement display suppressed)

Text converted and initial EAD tagging provided by Apex Data Services, January 1999; encoding completed by Manuscript Division, 1999

Comments:

- Each division should follow its own guidelines on giving names of encoders. It will be useful to record conversions performed in whole or part by outside agencies.
- Use natural language for a statement of the language or languages in which the finding aid is written; use the LANGCODE attribute with value taken from ISO 639-2 for the language code in `<language>`, which will normally be "eng".
- Use the ENCODINGANALOG attribute "546" for `<langusage>` and "041" for `<language>`; the latter maps most precisely to the LANGCODE attribute on `<language>`. Note that this differs from the current version of RLG Best Practice Guidelines for Encoded Archival Description, which sets "546" as ENCODINGANALOG for `<langusage>`.

Repeatable: no

Order: follows `<filedesc>` and precedes `<revisiondesc>`

Revision Date: 05/01/08

3.1.4 Revision Description

Tag:

`<revisiondesc>`

Description:

The `<revisiondesc>` element contains information about substantial changes that have been made to the encoded finding aid.

LC Practice requires the inclusion of `<revisiondesc>` when applicable.

Subelements:

`<change encodinganalog="583">`

`<date>` (set normal attribute)

`<item>`

Tagging Example 1:

Finding aid revised and expanded (first revision of encoded finding aid)

```
<revisiondesc>
  <change encodinganalog="583">
    <date normal="1999-07">1999 July</date>
    <item>Finding aid revised to incorporate additional materials,
    December 18, 1998, and re-encoded by John Smith.</item>
  </change>
</revisiondesc>
```

Display Of Tagging Example 1:

Finding aid revised and expanded (first revision of encoded finding aid)

```
Latest revision: 1999-07
```

Tagging Example 2:

Only date of last revision displayed

```
<revisiondesc>
  <change encodinganalog="583">
    <date normal="2004-05-18">2004-05-18</date>
    <item>converted from EAD 1.0 to EAD 2002</item>
  </change>
  <change encodinganalog="583">
    <date normal="2000-04">2000 April</date>
    <item>linked to digital content</item>
  </change>
</revisiondesc>
```

Display Of Tagging Example 2:

Only date of last revision displayed

```
Latest revision: 2004-05-18
```

Comments:

- Remember that revisions to finding aids that take place before first conversion to EAD are listed in [<filedesc><authorstmt>](#) and [<processinfo>](#) rather than in the [<eadheader>](#).
- There is no need to record minor changes or corrections in [<revisiondesc>](#). File dates (in the short term) and repository management software (in the long run) will be used to track such changes.
- Provide sufficient information about each major change to identify the nature of the change. Name or identify the parties responsible for changes to the electronic finding aid if different from those already recorded under [<creation>](#). See Example 1.
- Give year and month, or year, month, and date for each change; list the date before the change. List changes in reverse chronological order. See Example 2.
- When finding aids are converted from version 1.0 to EAD 2002, the [<change>](#) element will automatically be added to an existing [<revisiondesc>](#) (see Example 2) or as a new [<revisiondesc>](#) for a finding aid which has not previously been revised.

Repeatable: yes

Order: follows [<profiledesc>](#)

Revision Date: 5/24/04

3.2 Title Page and Prefatory Matter

Tag:

```
<frontmatter>
```

Description:

The `<frontmatter>` element is a wrapper for publication-type structures, `<titlepage>` and `<div>`. The `<titlepage>` element groups bibliographic details about the encoded finding aid in an order and format optimized for display. The `<div>` element is a generic textual element that can be used to encode a forward, acknowledgements, introduction, or other prefatory material which does not pertain to the content of the specific finding aid or collection.

LC Practice discourages use of `<titlepage>` in favor of generating title page displays from the EAD header. A `<div>` may be used for common generic information, but such data which may pertain to repository policies, access, and reproduction is usually available on the division's Web site and may be linked to from the appropriate part of the finding aid instead.

See Also:

Section 3.1, EAD Header [Go To Section](#)

Subelements:

`<titlepage>`

`<div>`

Tagging Example 1:

Generic introduction to finding aids and contact information using external entity

```
<frontmatter>
  <div>
    <head>Introduction</head>
    <p>A finding aid or register is a descriptive access tool
    prepared to assist researchers in locating materials relevant to
    their research; it usually contains far more detail about a
    collection than can be captured in a catalog record. The finding
    aid often provides information about a collection's provenance
    and the conditions under which it may be accessed or copied;
    biographical or organizational histories related to the
    collection; a note describing the scope and content of the
    collection; and progressively detailed descriptions of the parts
    or components of the collection together with the corresponding
    call numbers, container numbers, or other means for researchers
    to identify and request the physical entities of interest to
    them. Detailed inquiries must be satisfied through a
    researcher's examination of the collection itself.</p>
    &contactinfo;
  </div>
</frontmatter>
```

Note: the full text of "contactinfo.sgm", commented out here, is stored externally to the finding aid

Display Of Tagging Example 1:

Generic introduction and contact information using external entity

Introduction

A finding aid or register is a descriptive access tool prepared to assist researchers in locating materials relevant to their research; it usually contains far more detail about a collection than can be captured in a catalog record. The finding aid often provides information about a collection's provenance and the conditions under which it may be accessed or copied; biographical

or organizational histories related to the collection; a note describing the scope and content of the collection; and progressively detailed descriptions of the parts or components of the collection together with the corresponding call numbers, container numbers, or other means for researchers to identify and request the physical entities of interest to them. Detailed inquiries must be satisfied through a researcher's examination of the collection itself.

Contact Information
 Manuscript Division
 Library of Congress
 101 Independence Ave., SE
 Washington, D.C. 20540-4680
 Phone: 202 707-5383
 Fax: 202 707-6336

Tagging Example 2:

Contact information within `<div>` (no entity used)

```
<div>
  <list type="simple">
    <item>
      <emph render="bold">Contact Information</emph>
    </item>
    <item>Manuscript Division</item>
    <item>Library of Congress</item>
    <item>101 Independence Ave., SE</item>
    <item>Washington, D.C. 20540-4680</item>
    <item>Phone: 202 707-5383</item>
    <item>Fax: 202 707-6336</item>
  </list>
</div>
```

Display Of Tagging Example 2:

Contact information within `<div>` (no entity used)

Contact Information
 Manuscript Division
 Library of Congress
 101 Independence Ave., SE
 Washington, D.C. 20540-4680
 Phone: 202 707-5383
 Fax: 202 707-6336

Comments:

- Title page displays at the Library of Congress are generated using `<eadheader>`. XSLT stylesheets permit the elements to display in different order or in an abbreviated fashion, and allow data such as the finding aid URL to be inserted without being encoded in the finding aid.
- The use of `<div>` as generic text, illustrated above, is not recommended for online finding aids. If such data must be included, care should be taken to distinguish generic introductory text from that belonging in more specific elements such as `<userrestrict>` or `<prefercite>`.

- A special situation may exist for brief contact information that would be helpful in a copy of the finding aid printed from the Web. On the other hand, this additional information is repetitive from finding aid to finding aid, and occupies screen real estate which may be at a premium when frames are used for display.
- If contact information is desired in the `<frontmatter><div>`, it may be generated by means of an external entity, as illustrated in Example 1, or keyed directly into the `<div>`, as in Example 2. External entities are a more efficient way of storing the information, so that it need only be updated in one location. However, use of external entities is problematic in XML. In any case, however, entities should be resolved before finding aids are exported to an outside system.

Repeatable: no

Order: following `<eadheader>` and before `<archdesc>`

Revision Date: 05/01/08

3.3 Collection-Level Information (Archival Description)

Tag:

`<archdesc>`

Description:

This wrapper element holds together the text of the archival finding aid, encompassing everything that is not included in the header or front matter. A required LEVEL attribute identifies the highest level of description represented by the finding aid, and other attributes may be set as well.

See Also:

Section 3.3.1.6, Language of the Material [Go To Section](#)

Section 3.3.1.11, Digital Archival Object Group [Go To Section](#)

Section 3.3.9, Other Descriptive Data [Go To Section](#)

Other Attributes:

The most common attribute values are listed below:

- `level="collection"` (entire collection described in finding aid) **REQUIRED BY DTD**
- `type="register"` (for standard archival register) **Recommended**
- `relatedencoding="MARC21"` **Recommended**

Subelements:

These most significant subelements are listed in recommended order:

`<did>` **Required by DTD** See 3.3.1, Basic Description: The High-level `<did>`

`<controlaccess>` **Recommended** See 3.3.2, Controlled Vocabulary Terms

`<descgrp type="admininfo">` **Required** See 3.3.3, Administrative Information

`<bioghist>` **Recommended** See 3.3.4, Biographical Sketches and Agency Histories

`<scopecontent>` **Required** See 3.3.5, Scope and Content Note

`<arrangement>` **Recommended** See 3.3.6, Arrangement

`<dsc>` **Required** See 3.3.7, Description of Subordinate Components

<descgrp type="add"> See 3.3.8, Adjunct Descriptive Data

See Tag Library for full list of valid subelements.

Tagging Example 1:

All major subelements include head tags

```
<archdesc level="collection" type="register" relatedencoding="MARC21">
  <did>
    <head>Collection Summary</head>
  </did>
  <controlaccess>
    <head>Selected Search Terms</head>
  </controlaccess>
  <descgrp type="admininfo">
    <head>Administrative Information</head>
  </descgrp>
  <bioghist>
    <head>Biographical Note</head>
  </bioghist>
  <scopecontent>
    <head>Scope and Content Note</head>
  </scopecontent>
  <arrangement>
    <head>Organization and Arrangement of Papers</head>
  </arrangement>
  <dsc type="combined">
    <head>Container List</head>
  </dsc>
  <descgrp type="add">
    <head>Appendix</head>
  </descgrp>
</archdesc>
```

Display Of Tagging Example 1:

```
Collection Summary
Selected Search Terms
Administrative Information
Biographical Note
Scope and Content Note
Organization and Arrangement of Papers
Container List
Appendix
```

Table of Contents generated from headings of major archdesc subelements

Comments:

Attributes:

- The LEVEL attribute, required by the DTD, is usually set as level="collection", as when entire collection is described in the finding aid. If only one series of the collection is described in the finding aid, use level="series". See Tag Library for full list of values.
- Set the attribute type="register" for a standard archival register as created at LC. See Tag Library for full list of values.

- Set the related encoding attribute to relatedencoding="MARC21".

Recommended order:

- Exceptions will occur in the recommended order, as listed above. For instance, most elements formerly subordinate to <add>, such as indexes and bibliographies, are most commonly found at the end of a finding aid. Other such elements, like <relatedmaterial> and <separatedmaterial>, may be more appropriate to the front part of the finding aid, and can be used where most appropriate. This new version of the EAD DTD (EAD 2002) accommodates more flexible order by unbundling the <add> and <admininfo> subelements, but puts more demand on output specifications in handling a great number of element configurations.

Subelements:

- A number of elements are available at the <archdesc> level but are also commonly appropriate at the component level. These include <note>, <odd>, and <arrangement>.
- The <daogrp> element can also be used at the <archdesc> level. This might be an image concordance for all <dao> elements in the finding aid. An image sampler would be encoded at the Collection Summary level, and component-level archival objects would be encoded at the appropriate level. See Sections 3.3.1.11, Digital Archival Object Group, and 3.3.7.4, Expanded Description of Components for treatment of <daogrp> in these cases.

Repeatable: no

Order: follows <eadheader> and optional <frontmatter>

Revision Date: 05/01/08

3.3.1 Basic Description: The High-Level <did>

Tag:

<did>

Description:

This wrapper element contains the basic building blocks of description of archival components at any level. At the collection level (or <archdesc><did>), the content of these elements should enable a researcher to determine quickly the relevance of collection materials. It is important to include at least the first eight elements in any collection summary.

LC Practice requires the inclusion of the Collection Summary <did>, which is a mandatory element required by the EAD DTD.

Labels/heads:

Recommended content of required <head>:

Collection Summary

Subelements:

Listed in recommended order. Required elements must be included to conform with LC practice.

<head> **Required**

<unittitle> **Required** See 3.3.1.1, Title of the Unit

<unitdate> **Required** See 3.3.1.2, Date of the Unit

<unitid> **Required** See 3.3.1.3, ID of the Unit

<origination> **Required** See 3.3.1.4, Origination

<physdesc> **Required** See 3.3.1.5, Physical Description

- <materialspec> See Tag Library
- <langmaterial> **Required** See 3.3.1.6, Language of the Material
- <repository> **Required** See 3.3.1.7, Repository
- <abstract> **Required** See 3.3.1.8, Abstract
- <note> See 3.3.1.9, Note
- <physloc> See 3.3.1.10, Physical Location
- <daogrp> See 3.3.1.11, Digital Archival Object Group

Tagging Example 1:

All subelements used

```
<did>
  <head>Collection Summary</head>
  <unittitle label="Title" encodinganalog="245$a">Carrie Chapman Catt Papers
    <unitdate label="Span Dates" type="inclusive" encodinganalog="245$f"
normal="1848/1950">1848-1950</unitdate>
    <unitdate label="Bulk Dates" type="bulk" encodinganalog="245$g"
normal="1890/1920">(bulk 1890-1920)</unitdate>
  </unittitle>
  <unitid label="ID No." encodinganalog="590" countrycode="us" repositorycode="dlc">MSS15404</unitid>
  <origination label="Creator">
    <persname encodinganalog="100" source="LCNAF">Catt, Carrie
    Chapman, 1859-1947</persname>
  </origination>
  <physdesc label="Extent">
    <extent encodinganalog="300">9,500 items including 24 maps</extent>
    <extent encodinganalog="300">31 containers</extent>
    <extent encodinganalog="300">12.4 linear feet</extent>
    <extent encodinganalog="300">18 microfilm reels</extent>
  </physdesc>
  <materialspec label="Scale" encodinganalog="255">1:1,00,000</materialspec>
  <langmaterial label="Language" encodinganalog="546">Collection material in
  <language encodinganalog="041" langcode="eng">English.</language>
</langmaterial>
  <repository label="Repository" encodinganalog="852">
  <corpname>
    <subarea>Manuscript Division</subarea> Library of
    Congress</corpname>
  <address>
    <addressline>Washington, D.C.</addressline>
  </address>
</repository>
  <abstract label="Abstract" encodinganalog="520$a">Feminist, lecturer,
  and author. Correspondence, diaries (1911-1923), drafts of speeches
  and articles, subject files, biographical papers, newspaper
  clippings, printed material, and other papers, chiefly 1890-1920,
  relating primarily to Carrie Chapman Catt's efforts on behalf of the
  women's suffrage movement, feminism, and the cause of international
  peace.</abstract>
  <note label="Note" encodinganalog="500$a">
  <p>Although this finding aid provides contextual information about
  the entire collection of Catt papers, the Scope and Content Note,
  Description of Series, and Container List describe Part II only.
  The register for Part I is published and is available in the
  Manuscript Division Reading Room.</p>
</note>
</did>
```

```

</note>
<physloc label="Location" encodinganalog="852$z">The Carrie
Chapman Catt Papers are stored off-site. Please contact the
Manuscript Reading Room several days in advance of your visit to
assure that the containers you wish to consult will be available when
you arrive.</physloc>
<daogrp>
  <daodesc>
    <head>Image Sampler</head>
    <p>Explanatory paragraph about representative images from collection.</p>
  </daodesc>
  <daoloc href="&lbphotos.box199;">
    <daodesc>
      <p>Carrie Chapman Catt, head-and-shoulders portrait,
      ...</p>
    </daodesc>
  </daoloc>
</daogrp>
</did>

```

Display Of Tagging Example 1:

All subelements used

Collection Summary

Title: Carrie Chapman Catt Papers
 Span Dates: 1848-1950
 Bulk Dates: (bulk 1890-1920)
 ID No.: MSS15404
 Creator: Catt, Carrie Chapman, 1859-1947
 Extent: 9,500 items including 24 maps; 31 containers;
 12.4 linear feet; 18 microfilm reels
 Scale: 1:100,000
 Language: Collection material in English
 Repository: Manuscript Division, Library of Congress,
 Washington, D.C.
 Abstract: Feminist, lecturer, and author. Correspondence,
 diaries (1911-1923), drafts of speeches and articles, subject
 files, biographical papers, newspaper clippings, printed
 material, and other papers, chiefly 1890-1920, relating primarily
 to Carrie Chapman Catt's efforts on behalf of the women's
 suffrage movement, feminism, and the cause of international
 peace.
 Note: Although this finding aid provides contextual
 information about the entire collection of Catt papers, the
 Scope and Content Note, Description of Series, and Container
 List describe Part II only. The register for Part I is
 published and is available in the Manuscript Division Reading
 Room.
 Location: The Carrie Chapman Catt Papers are stored
 off-site. Please contact the Manuscript Reading Room several
 days in advance of your visit to assure that the containers
 you wish to consult will be available when you arrive.

Image Sampler

Explanatory paragraph about representative images from collection.

[Image of Catt]

Carrie Chapman Catt, head-and-shoulders portrait, ...

Image sampler is part of Collection Summary although it appears to be a new section

Comments:

- Since the components of the high-level <did> are key features of indexing and display of LC finding aids, uniformity of practice in this area is particularly desirable in order to achieve the most predictable results.

Repeatable: no

Order: first element within <archdesc> (required by DTD)

Revision Date: 05/01/08

3.3.1.1 Title of the Unit

Tag:

<unittitle>

Description:

Title of materials being described, usually the collection title or title of highest level being described in the finding aid.

LC Practice requires the inclusion of <unittitle> information within the Collection Summary <did>.

See Also:

Section 3.3.1.2, Date of the Unit [Go To Section](#)

Labels/heads:

- Label="Title"

Encoding Analog:

245\$a (include other subfields if they are part of the title transcription).

Subelements:

<unitdate>

See Tag Library for full list of valid subelements.

Tagging Example 1:

Examples of collection titles

```
<unittitle label="Title" encodinganalog="245$a">
Susan B. Anthony Papers</unittitle>
<unittitle label="Title" encodinganalog="245$a">
MacDowell Colony Records</unittitle>
<unittitle label="Title" encodinganalog="245$a">
Pierre and Jacques Dupuy Collection</unittitle>
<unittitle label="Title" encodinganalog="245$a">
William Duane Letters</unittitle>
<unittitle label="Title" encodinganalog="245$a">
National Urban League Southern Regional Office Records</unittitle>
```

```
<unittitle label="Title" encodinganalog="245$a">
Job Pierson Family Papers</unittitle>
<unittitle label="Title" encodinganalog="245$a">
Key-Cutts-Turner Family Papers</unittitle>
<unittitle label="Title" encodinganalog="245$a">
Ken McCormick Collection of Doubleday & Company Records</unittitle>
<unittitle label="Title" encodinganalog="245$a">
Herndon-Weik Collection of Lincolniana</unittitle>
<unittitle label="Title" encodinganalog="245$a">
Walt Whitman Papers in the Charles E. Feinberg Collection</unittitle>
```

Display Of Tagging Example 1:

Examples of collection titles

```
Title:      Susan B. Anthony Papers
Title:      MacDowell Colony Records
Title:      Pierre and Jacques Dupuy Collection
Title:      William Duane Letters
Title:      National Urban League Southern Regional Office Records
Title:      Job Pierson Family Papers
Title:      Key-Cutts-Turner Family Papers
Title:      Ken McCormick Collection of Doubleday & Company Records
Title:      Herndon-Weik Collection of Lincolniana
Title:      Walt Whitman Papers in the Charles E. Feinberg Collection
```

Tagging Example 2:

Inclusive dates given as subelement within `<unittitle>`

```
<unittitle label="Title" encodinganalog="245$a">Carrie Chapman Catt Papers
  <unitdate label="Dates" type="inclusive" encodinganalog="245$f" normal="1848/1950">1848-1950</unitdate>
</unittitle>
```

Display Of Tagging Example 2:

Inclusive dates given as subelement within `<unittitle>`

```
Title: Carrie Chapman Catt Papers, 1848-1950
```

Style sheet uses label from `<unittitle>` and supplies comma at end; suppresses display of unitdate label and displays both fields on one line

Tagging Example 3:

Inclusive dates given as subelement within `<unittitle>`

```
<unittitle label="Title" encodinganalog="245$a">MacDowell Colony Records
  <unitdate label="Dates" type="inclusive" encodinganalog="245$f" normal="1869/1970">1869-1970
</unitdate>
</unittitle>
```

Display Of Tagging Example 3:

Inclusive dates given as subelement within `<unittitle>`

| | |
|--------|--------------------------|
| Title: | MacDowell Colony Records |
| Dates: | 1869-1970 |

Style sheet uses labels from `<unittitle>` and `<unitdate>` and displays each on separate line

Comments:

- Titles should be descriptive enough to stand as the primary access element (e.g., "Shirley Jackson Papers" rather than "Papers") Give the collection title in direct order, unless your cataloging practice varies. If the collection consists of only one type of material, that format may be reflected in the title. See Example 1 for aggregated list of illustrative titles.
- `<unitdate>` may be used outside the `<unittitle>`, but LC practice mandates its inclusion within `<unittitle>`. The date may be displayed on the same line as the title (Example 2) or on different lines (Example 3) depending on the stylesheet used.
- No punctuation should be supplied between `<unittitle>` and its component `<unitdate>`, although a space should be left before the `<unitdate>` for cases when both will display on one line. Experience shows that the placement of `<unittitle>` and `<unitdate>` information in the Collection Summary varies considerably in Library and outside implementation, and omission of punctuation between the two elements is least likely to result in inappropriate display. See Example 2 and Example 3.

Order: First element after `<head>` in Collection Summary

Revision Date: 05/01/08

3.3.1.2 Date of the Unit**Tag:**

`<unitdate>`

Description:

Dates of the materials comprising the collection; the dates may be given as inclusive, bulk, or both.

LC Practice requires the inclusion of unitdate information within the Collection Summary `<did>`.

Labels/heads:

Suggested content:

- Label="Dates" (may be used for any type)
- Label="Span Dates" (type="inclusive")
- Label="Bulk Dates" (type="bulk")

Encoding Analog:

260\$c (for any type dates, according to visual material cataloging practice); 245\$f (type="inclusive" or type="single"), according to DACS cataloging practice; or 245\$g (type="bulk") according to DACS cataloging practice

Other Attributes:

- type="inclusive" or "bulk" **Required**
- normal (normalize according to ISO8601 in yyyy-mm-dd format) **Required**

- calendar="gregorian" Default value
- era="ce" Default value for common/Christian era
- datechar="creation" **Recommended**

See Tag Library for full list of valid subelements and their attributes.

Tagging Example 1:

Illustrates use of inclusive and bulk dates, encoded separately with encoding analogs from MARC record for DACS cataloging

```
<unittitle label="Title" encodinganalog="245$a">Wilbur and Orville Wright Papers
<unitdate label="Span Dates" type="inclusive" encodinganalog="245$f" normal="1932/1970"
datechar="creation">1932-1970</unitdate>
<unitdate label="Bulk Dates" type="bulk" encodinganalog="245$g" normal="1944/1955"
datechar="creation">(bulk 1944-1955)</unitdate>
</unittitle>
```

Display Of Tagging Example 1a:

Style sheet displays `<unitdate>` on same line as unittitle without `<unitdate>` labels

```
Title: Wilbur and Orville Wright Papers, 1932-1970 (bulk 1944-1955)
```

Display Of Tagging Example 1b:

Style sheet displays each `<unitdate>` on separate line using label attribute

```
Title: Wilbur and Orville Wright Papers
Span Dates: 1932-1970
Bulk Dates: (bulk 1944-1955)
```

Display Of Tagging Example 1c:

Style sheet displays `<unitdate>` on separate line from `<unittitle>`, using label display for the first (inclusive) dates.

```
Title: Wilbur and Orville Wright Papers
Span Dates: 1932-1970, (bulk 1944-1955)
```

Tagging Example 2:

Illustrates use of span and bulk dates; encoding analog follows visual material cataloging practice

```
<unittitle label="Title" encodinganalog="245$a">Visual Materials from
the National Association for the Advancement of Colored People Records
<unitdate label="Span Dates" type="inclusive" encodinganalog="260$c" normal="1838/1969"
datechar="creation">circa 1838-1969</unitdate>
<unitdate label="Bulk Dates" type="bulk" encodinganalog="260$c" normal="1944/1955"
datechar="creation">bulk 1944-1955</unitdate>
</unittitle>
```

Display Of Tagging Example 2:

Style sheet displays `<unitdate>` on same line as `unittitle` without `<unitdate>` labels; parentheses are supplied around `<unitdate type="bulk">`

```
Title: Visual Materials from the National Association for the
Advancement of Colored People Records, circa 1838-1969 (bulk 1944-1955)
```

Tagging Example 3:

Illustrates use of inclusive attribute value and `encodinganalog` as 260

```
<unittitle label="Title" encodinganalog="245$a">The Juan B. Rael Collection
<unitdate label="Dates" type="inclusive" encodinganalog="260$c" normal="1940"
datechar="creation">1940</unitdate>
</unittitle>
```

Display Of Tagging Example 3:

Style sheet displays `<unitdate>` on separate line using label attribute

```
Title: The Juan B. Rael Collection
Dates: 1940
```

Comments:

- Always give span and bulk dates in separate `<unitdate>` fields in order to supply the appropriate TYPE, LABEL, ENCODINGANALOG, and NORMAL attributes. It is still possible to display the dates on the same line as the `<unittitle>` and without labels, and offers the broadest range of display and retrieval options. See Example 1 for practice using DACS and Example 2 for practice using visual material cataloging rules.
- Use only one `<unitdate>` when there is only one date (Example 3) or when there are no bulk dates to accompany the inclusive dates.
- Do not put a comma between `<unittitle>` and `<unitdate>`, but make sure there is a space before the opening `<unitdate>` tag. It is equally possible to display the two elements on the same line (omitting the label for `<unitdate>`) and to put them on different lines (labeling the `<unitdate>`).
- Always supply a label for dates. However, it is not necessary to supply a label for bulk dates if there is no desire to display them on a separate line from inclusive dates.
- Set the TYPE attribute for all `<unitdate>` elements. The most common value, "inclusive", can be set as the default value in creation and conversion tools.
- Set the NORMAL attribute to take advantage of date searching (not yet implemented at LC). It may take some time to develop date normalization tools and macros.
- Normalize dates following ISO 8601 in yyyy-mm-dd format. Follow this normalization standard also for `<date>` elements normalized in the `<eadheader>` and elsewhere as appropriate. Note that examples in the current EAD Tag Library do not illustrate the use of this standard.
- It is not necessary to set attributes CALENDAR and ERA explicitly for `<unitdate>` elements at the Collection Summary level, as default values are supplied by the DTD. Set these attributes if their values differ from the defaults of Gregorian calendar and common/Christian era.
- Set the DATECHAR attribute with value "creation". Creation dates are "the date(s) at which the unpublished documents in the unit being described were originally created or captured in some material form," in contrast with other categories such as dates of reproduction or of publication.

Repeatable: yes

Order: Following/within <unittitle> and before <unitid> in Collection Summary

Revision Date: 05/01/08

3.3.1.3 ID of the Unit

Tag:

<unitid>

Description:

Identifying number or alphanumeric string used for control or citation purposes. Supply according to divisional practices. When no such ID is appropriate, use this element to supply unique country and repository codes by means of attribute values; the element will have no other content.

LC Practice requires the inclusion of the unitid element within the Collection Summary <did>.

Labels/heads:

Label should be appropriate to content. Do not supply label if unitid element has no content.

- label="Call No."
- label="Collection No."
- label="ID No."

Encoding Analog:

050, 090, 099, 590, or other MARC field as appropriate (see catalog record). Do not set an ENCODINGANALOG if element contains boilerplate language.

Other Attributes:

- countrycode="US" (Source: ISO 3166) **Required**
- repositorycode="DLC" (Source: ISO15511, which accommodates codes used in MARC Code List for Organizations) **Required**

Tagging Example 1:

American Folklife Center ID number

```
<unitid label="Call No." encodinganalog="090" countrycode="US"
repositorycode="DLC">AFC 1940/002</unitid>
```

Display Of Tagging Example 1:

American Folklife Center ID number

```
Call No.:   AFC 1940/002
```

Tagging Example 2:

Prints & Photographs 050 content

```
<unitid label="Call No." encodinganalog="050" countrycode="US" repositorycode="DLC">
```


Guide Record</unitid>

Display Of Tagging Example 2:

Prints & Photographs 050 content

Call No.: Guide Record

Tagging Example 3:

MSS ID number from 590 note

```
<unitid label="ID No." encodinganalog="590" countrycode="US" repositorycode="DLC">MSS84292</unitid>
```

Display Of Tagging Example 3:

MSS ID number from 590 note

ID No.: MSS84292

Comments:

- Use this element in order to conform to the ISAD-G international archival standard in supplying required country and repository codes.
- If no identification number is given, use appropriate boilerplate language.

Order:

following <unittitle><unitdate> and preceding <origination> in Collection Summary

Revision Date: 05/01/08

3.3.1.4 Origination

Tag:

<origination>

Description:

The origination element names, in authorized form, the individual/s or organization/s responsible for the creation, accumulation, or assembly of the described materials before their incorporation into an archival repository. There will in almost all cases be an <origination> element, whether or not a cataloging record for the materials uses main entry as a personal or corporate name or enters under title with added entries for the originator/s.

LC Practice requires the inclusion of origination information within the Collection Summary <did>, except in cases listed below.

See Also:

Section 3.3.2.1, Use of Attributes in <controlaccess> Subelements [Go To Section](#)

Labels/heads:

(choose as appropriate)

- Label="Creator"

- Label="Collector"

Encoding Analog:

Encodinganalog should be set for the subelement <persname>, <famname>, or <corpname> with the following values: 100 (personal or family name main entry), 110 (corporate name main entry), 600 (personal/family name subject entry), 700 (personal/family name added entry), 710 (corporate name added entry).

Other Attributes:

- Use role="collector" for <persname>, <famname>, or <corpname> when label="Collector" in <origination>
- Use the SOURCE attribute for <persname>, <famname>, or <corpname> in <origination> (value is usually "LCNAF")

Subelements:

Use of one of the following subelements is required:

<persname>

<famname>

<corpname>

Tagging Example 1:

One origination (cataloging record has 1xx field for originator)

```
<origination label="Collector">
  <persname encodinganalog="100" role="collector"
  source="LCNAF">Cushing, Caleb, 1800-1879, collector</persname>
</origination>
```

Display Of Tagging Example 1:

One origination (cataloging record has 1xx field for originator)

```
Collector: Cushing, Caleb, 1800-1879, collector
```

Note: includes subfield e for role as collector

Tagging Example 2:

Multiple originators, but one predominates

```
<origination label="Creator">
  <persname encodinganalog="100" source="LCNAF">Roosevelt, Kermit,
  1889-1943</persname>
</origination>
```

Display Of Tagging Example 2:

Multiple originators, but one predominates

```
Creator: Roosevelt, Kermit, 1889-1943
```

Papers of Kermit and Belle Roosevelt; Belle Roosevelt (700) listed in <controlaccess> section.

Tagging Example 3:

Bob Fosse/Gwen Verdon Collection: title main entry with 7xx entry for each originator

```
<origination label="Creator">
<persname encodinganalog="700" source="LCNAF">Fosse, Bob,
1927-1987</persname>
</origination><origination label="Creator">
<persname encodinganalog="700" source="LCNAF">Verdon,
Gwen</persname>
</origination>
```

Display Of Tagging Example 3:

Bob Fosse/Gwen Verdon Collection: title main entry with 7xx entry for each originator

```
Creator: Fosse, Bob, 1927-1987
Creator: Verdon, Gwen
```

Tagging Example 4:

No <origination>; family names recorded in <controlaccess> only

```
<unittitle>Key-Cutts-Turner family papers, 1808-1975</unittitle>
```

Display Of Tagging Example 4:

No <origination>; family names recorded in <controlaccess> only

```
Key-Cutts-Turner family papers, 1808-1975
```

Tagging Example 5:

No origination given (do not record LC as collector)

```
<unittitle label="Title">California travel diaries, 1849-1851</unittitle>
```

Display Of Tagging Example 5:

No origination given (do not record LC as collector)

```
Title: California travel diaries, 1849-1851
```

Comments:

- Use the form of name found in the LC Name Authority File as it appears (usually indirect order), with the content of all subfields included, including role (\$e) when given. See Example 1.
- When there are multiple originators, but one person or group can be identified as the primary originator, provide the first name (1xx in catalog record) under origination, and include secondary originators. Consult cataloging rules for guidance in making this determination. See Example 2.
- When two or more originators are of equal importance (i.e., catalog record has title main entry with 7xx entry for each originator), record each originator within an <origination> tag with appropriate attributes. See Example 3. If

there are two originators known to be of equal importance but the catalog entry selects one as main entry, record each originator within an `<origination>` tag with ENCODINGANALOG set to "100".

- When there are a number of originators of equal importance, it may be more appropriate to omit the origination field in Collection Summary and give the originator's names only in the `<controlaccess>` area. See Example 4.
- When no originator can be identified, usually an artificial collection (a topical or format-oriented collections aggregated by the institution), where the catalog record has title main entry, there will be no `<origination>` and no creator identified in the `<controlaccess>` area). See Example 5.

Repeatable: yes

Order: After `<unitid>` and before `<physdesc>` in Collection Summary

Revision Date: 09/17/03

3.3.1.5 Physical Description

Tag:

`<physdesc>`

Description:

Statement or series of statements of extent regarding holdings of the collection.

LC Practice requires the inclusion of physical description information within the Collection Summary `<did>`.

Labels/heads:

- label="Extent"
- label="Physical Description"

Subelements:

`<extent encodinganalog="300">`

See Tag Library for full list of valid subelements and their attributes.

Tagging Example 1:

Multiple views of one collection given as extents within one `<physdesc>`

```
<physdesc label="Extent">
<extent encodinganalog="300">22 linear feet</extent>
<extent encodinganalog="300">1600 items</extent>
<extent encodinganalog="300">16 containers</extent>
<extent encodinganalog="300">14 reels</extent>
</physdesc>
```

Display Of Tagging Example 1:

Multiple views of one collection given as separate extents within one `<physdesc>`; stylesheet displays on one line with label for `<physdesc>` and supplies semicolons and spaces dividing each `<extent>`

```
Extent: 22 linear feet; 1600 items; 16 containers; 14 reels
```

Tagging Example 2:

Separate descriptions of positive and negative elements comprising collections given as extents within `<physdesc>`

```
<physdesc label="Physical Description" encodinganalog="300">
<extent>4,596 items; photographic prints, photomechanical prints,
lithographs, engravings, and drawings, most b&w, a few color ;
various sizes, most 8 x 10 in. or smaller, some as large as 76 x 61
cm.</extent>
<extent>200 photographic negatives</extent>
</physdesc>
```

Display Of Tagging Example 2:

Separate descriptions of positive and negative elements comprising collections given as extents within `<physdesc>`

```
Physical Description: 4,596 items; photographic prints,
photomechanical prints, lithographs, engravings, and drawings, most
b&w, a few color ; various sizes, most 8 x 10 in. or smaller, some
as large as 76 x 61 cm.; 200 photographic negatives
```

Tagging Example 3:

Description of elements comprising collections given as single extent within `<physdesc>`

```
<physdesc label="Extent">
<extent encodinganalog="300">Twenty hours of sound recordings,
fourteen linear inches of manuscript materials, approximately 130
linear feet of microfilm, fourteen photographic prints, and one
moving image.
</extent>
</physdesc>
```

Display Of Tagging Example 3:

Description of elements comprising collections given as single extent within `<physdesc>`

```
Extent: Twenty hours of sound recordings, fourteen linear inches of
manuscript materials, approximately 130 linear feet of microfilm,
fourteen photographic prints, and one moving image.
```

Comments:

- Information may be encoded within `<physdesc>` and its subelements at varying levels of complexity. If more specificity is desired for purposes of retrieval or display, follow the guidance of the Tag Library and Application Guidelines in the use of the additional subelements `<physfacet>`, `<dimensions>`, and `<genreform>`.
- Descriptive practice within physical description generally consists of multiple views of the collection as a whole (Example 1), or description of the types of material in the collection (Examples 2 and 3).
- When presenting multiple views of the collection, the order and content of the statements will generally reflect that of the catalog record, where each statement is found in a separate 300 field. (Examples 1 and 2).
- The physical description and extent statements may be broken into separate categories, as for positive and negative photographic media (Example 2).

- The content of the ENCODINGANALOG attribute should be "300" without subfields, as the MARC subfields do not map precisely to subelements of [<physdesc>](#).

Repeatable: yes

Order:

Following [<origination>](#) and before [<langmaterial>](#) in Collection Summary

Revision Date: 09/30/03

3.3.1.6 Language of the Material

Tag:

langmaterial

Description:

Use the [<langmaterial>](#) element with its subelement/s [<language>](#) to indicate the language or languages of the material represented in the collection.

LC Practice requires the use of [<langmaterial>](#) at the [<archdesc>](#) level.

Labels/heads:

Choose as appropriate:

- Language:
- Languages:

Encoding Analog: 546

Subelements:

[<language encodinganalog="041" langcode="eng">](#) (or appropriate language code) **Required**

Tagging Example 1:

Multiple languages found in papers

```
<langmaterial label="Languages" encodinganalog="546">Collection material in
<language encodinganalog="041" langcode="eng">English,</language>
<language encodinganalog="041" langcode="ger">German,</language>
and <language encodinganalog="041" langcode="ita">Italian.</language>
</langmaterial>
```

Display Of Tagging Example 1:

Multiple languages found in papers

```
Languages: Collection material in English, German, and Italian.
```

Comments:

- Use the ENCODINGANALOG attribute "546" for [<language>](#) and "041" for [<language>](#); the latter maps most precisely to the LANGCODE attribute on [<language>](#).
- Set the SCRIPTCODE attribute for [<language>](#) within [<language>](#) and [<langmaterial>](#) using ISO 15924 only if nonroman script needs to be noted.

- Do not confuse `<langmaterial>` with `<language>`, the `<eadheader>` element describing the language of the finding aid.

Repeatable: no

Order: After `<physdesc>` and before `<repository>`

Revision Date: 05/01/08

3.3.1.7 Repository

Tag:

`<repository>`

Description:

The institution or agency responsible for providing intellectual access to the materials being described. At the Library of Congress, the repository usually will be the custodial unit or division where the material is available for use.

LC Practice requires the inclusion of repository information within the Collection Summary `<did>`.

Labels/heads:

Label="Repository"

Encoding Analog: 852

Subelements:

`<corpname>`

`<subarea>`

`<address>`

`<addressline>`

Tagging Example 1:

Illustrates single subarea within LC

```
<repository label="Repository" encodinganalog="852">
  <corpname>
    <subarea>Prints and Photographs Division</subarea>
    Library of Congress
  </corpname>
  <address>
    <addressline>Washington, D.C.</addressline>
  </address>
</repository>
```

Display Of Tagging Example 1:

Illustrates single subarea within LC

```
Repository: Prints and Photographs Division, Library of Congress,
           Washington, D.C.
```

Tagging Example 2:

Illustrates multiple terms within one subarea element

```
<repository label="Repository" encodinganalog="852">
  <corpname>
    <subarea>Archive of Folk Culture, American Folklife Center</subarea>
    Library of Congress
  </corpname>
  <address>
    <addressline>Washington, D.C.</addressline>
  </address>
</repository>
```

Display Of Tagging Example 2:

Illustrates multiple terms within one subarea element

```
Repository: Archive of Folk Culture, American Folklife Center, Library
            of Congress, Washington, D.C.
```

Tagging Example 3:

Multi-divisional finding aid

```
<repository label="Repository" encodinganalog="852">
  <corpname>
    <subarea>Archive of Folk Culture, American Folklife
    Center</subarea> Library of Congress
  </corpname>
  <address>
    <addressline>Washington, D.C.</addressline>
  </address>
</repository>
<repository label="Repository" encodinganalog="852">
  <corpname>
    <subarea>Motion Picture, Broadcasting and Recorded Sound Division</subarea>
    Library of Congress
  </corpname>
  <address>
    <addressline>Washington, D.C.</addressline>
  </address>
</repository>
<repository label="Repository" encodinganalog="852">
  <corpname>
    <subarea>Music Division</subarea>
    Library of Congress</corpname>
  <address>
    <addressline>Washington, D.C.</addressline>
  </address>
</repository>
<repository label="Repository" encodinganalog="852">
  <corpname>
    <subarea>Prints and Photographs Division</subarea>
    Library of Congress
  </corpname>
  <address>
    <addressline>Washington, D.C.</addressline>
```



```
</address>
</repository>
```

Display Of Tagging Example 3:

Multi-divisional finding aid

```
Repository:    Archive of Folk Culture, American Folklife Center,
                Library of Congress, Washington, D.C.
Repository:    Motion Picture, Broadcasting and Recorded Sound Division,
                Library of Congress, Washington, D.C.
Repository:    Music Division, Library of Congress, Washington, D.C.
Repository:    Prints and Photographs Division, Library of Congress,
                Washington, D.C.
```

Comments:

- Always encode as `<subarea>` the reading room where the material is available. This information is displayed as part of search results, and its correct encoding will facilitate the future ordering of search results by `<subarea>`. See Examples 1-2 for encoding of `<subarea>`.
- Use `<address>` at its most general form, "Washington, D.C.," for the convenience of users who may be searching a multi-national database.
- Use of punctuation: do not include a comma between elements. Rely on stylesheets instead to needed punctuation and spaces between the elements. See Examples 1-3.
- For a multi-divisional finding aid, use a new repository tag for each section. See Example 3.

Repeatable: yes**Order:** After `<langmaterial>` and before `<abstract>` in Collection Summary**Revision Date:** 05/01/08**3.3.1.8 Abstract****Tag:**

```
<abstract>
```

Description:

A brief statement about the creator or collector and the scope of the materials.

LC Practice requires the inclusion of abstract information within the Collection Summary `<did>`.

See Also:

Section 3.3.1.9, Note [Go To Section](#)

Labels/heads:

- label="Abstract"
- label="Summary"

Encoding Analog:

Generally use 520\$a, although some information may be also derived from 545.

Tagging Example 1:

Abstract for personal papers (Caleb Cushing)

```
<abstract label="Abstract" encodinganalog="520$a">
U.S cabinet official and representative from Massachusetts, army
officer, diplomat, and lawyer. Correspondence, memoranda, diaries,
journals, writings, speeches, notes, notebooks, legal file, business
papers, biographical material, newspaper clippings, printed material,
maps, photographs, and other papers reflecting Cushing's role in
national and international affairs of the mid-nineteenth century.
</abstract>
```

Display Of Tagging Example 1:

Abstract for personal papers (Caleb Cushing)

```
Abstract: U.S cabinet official and representative from Massachusetts,
army officer, diplomat, and lawyer. Correspondence, memoranda,
diaries, journals, writings, speeches, notes, notebooks, legal file,
business papers, biographical material, newspaper clippings, printed
material, maps, photographs, and other papers reflecting Cushing's
role in national and international affairs of the mid-nineteenth
century.
```

Tagging Example 2:

Abstract for organizational records (Leadership Conference on Civil Rights)

```
<abstract label="Abstract" encodinganalog="520$a">
The Leadership Conference on Civil Rights, a national association of
civil rights organizations, was founded 1949-1950 by Roy Wilkins
(chairman), A. Philip Randolph, and Arnold Aronson. The records
include correspondence, memoranda, minutes, notes of meetings,
position papers, reports, financial records, congressional testimony,
clippings, printed material, and other records documenting efforts by
the organization to lobby for and monitor enforcement of civil rights
legislation at the national level.
</abstract>
```

Display Of Tagging Example 2:

Abstract for organizational records (Leadership Conference on Civil Rights)

```
Abstract: The Leadership Conference on Civil Rights, a national
association of civil rights organizations, was founded 1949-1950 by
Roy Wilkins (chairman), A. Philip Randolph, and Arnold Aronson. The
records include correspondence, memoranda, minutes, notes of meetings,
position papers, reports, financial records, congressional testimony,
clippings, printed material, and other records documenting efforts by
the organization to lobby for and monitor enforcement of civil rights
legislation at the national level.
```

Comments:

- Use for quick overview of contents of collection; when needed, use `<note>` for overview of contents of finding aid itself.
- The abstract may be drawn from the `<bioghist>` and `<scopecontent>`, or from the 545 and 520 fields of the collection-level catalog record.

Order: Following `<repository>` and preceding `<note>` in Collection Summary

Revision Date: 07/11/03

3.3.1.9 Note**Tag:**

`<note>`

Description:

Generic explanatory text. In Collection Summary, may be used to indicate that the materials described in the high-level `<did>` are a component of a larger body of materials not described by the finding aid.

Labels/heads:

- label="Note"

Encoding Analog: Generally use 500\$a.

Tagging Example 1:

Note about finding aid as work in progress

```
<note label="Note" encodinganalog="500$a">
<p>Both the finding aid and the collection itself are currently to
be considered works in progress. Rather than wait until the entire
collection is processed before making it generally available to
researchers--our usual practice--we have decided to make each series
available as it is completed; the music will be the last series in
the collection to be processed.
</p>
</note>
```

Display Of Tagging Example 1:

Note about finding aid as work in progress

```
Note: Both the finding aid and the collection itself are currently to
be considered works in progress. Rather than wait until the entire
collection is processed before making it generally available to
researchers--our usual practice--we have decided to make each series
available as it is completed; the music will be the last series in the
collection to be processed.
```

Tagging Example 2:

Note about partial coverage of online finding aid

```
<note label="Note" encodinganalog="500$a">
<p>Although this finding aid provides contextual information about
```

the entire collection of National Urban League records, the Scope and Content note, Description of Series, and Container List describe Part II only. The register for Part I is published and is available in the Manuscript Division Reading Room.

</p>
</note>

Display Of Tagging Example 2:

Note about partial coverage of online finding aid

Note: Although this finding aid provides contextual information about the entire collection of National Urban League records, the Scope and Content note, Description of Series, and Container List describe Part II only. The register for Part I is published and is available in the Manuscript Division Reading Room.

Comments:

- The note element should not be used when more specific elements are available.
- Although the encoding analog for <note> is 500\$a, not every 500 field in the catalog record need be repeated in the finding aid or may be appropriate to this particular element.

Repeatable: yes

Order: after <abstract> and before <physloc> in Collection Summary

Revision Date: 08/09/02

3.3.1.10 Physical Location

Tag:

<physloc>

Description:

Information identifying the place where the described materials are stored. Do not confuse with <container> or <repository>. Use of this element is optional.

Labels/heads:

- label="Location"

Encoding Analog: 852\$z, 090, or other MARC field as appropriate (see catalog record)

Other Attributes:

Audience: set to "internal" if not for public display (for instance, shelf number for staff retrieval)

Tagging Example 1:

Public note alerting readers to storage issues affecting their access to the material.

<physloc label="Location" encodinganalog="852\$z">
The John Doe Papers are stored off-site. Please contact the Manuscript Reading Room several days in advance of your visit to assure that the containers you wish to consult will be available when you arrive.

```
</physloc>
```

Display Of Tagging Example 1:

Public note alerting readers to storage issues affecting their access to the material.

```
Location:      The John Doe Papers are stored off-site.  Please contact
the Manuscript Reading Room several days in advance of your visit to
assure that the containers you wish to consult will be available when
you arrive.
```

Tagging Example 2:

Note for staff use only giving shelving location of material for retrieval. AUDIENCE attribute set to 'internal.'

```
<physloc label="Location" encodinganalog="090" audience="internal">
0331L
</physloc>
```

Display Of Tagging Example 2:

Note for staff use only giving shelving location of material for retrieval. AUDIENCE attribute set to 'internal' resulting in blank display for public.

```
[No display for empty element]
```

Comments:

- Since the [<physloc>](#) element is repeatable both the usages illustrated in Examples 1 and 2 may apply to a given finding aid.
- Use the [<physloc>](#) element at this level to note that all material in the custody of one division is in the physical custody of another division (i.e., should be used in another reading room than that of the repository). This information would more commonly be recorded at the component level; see Section 3.3.7.3.6, Physical Location Information, for more information.

Repeatable: yes

Order: Following [<note>](#) and before [<daogrp>](#) in Collection Summary

Revision Date: 05/01/08

3.3.1.11 Digital Archival Object Group

Tag:

```
<daogrp>
```

Description:

A wrapper element for two or more related digital archival objects which should be thought of as a group and share a common description. In the collection summary area, used for "image samplers", or other visual or multimedia overviews of the collection consisting of selected images or other digital versions of collection material.

Use [<daogrp>](#), [<daoloc>](#), and [<dao>](#) only to point to electronic versions of material from the collection being described; links to external materials will be made using other tags, and are not appropriate for the [<archdesc>](#)[<did>](#).

<dao> elements may be used at many points in the finding aid, both at the component level (container list) and in the other major components (<bioghist>, <scopecontent>). The examples given illustrate one particular usage.

See Also:

Section 2.2.2, External Linking [Go To Section](#)

Section 3.3.7.4, Expanded Description of Components [Go To Section](#)

Labels/heads:

Image Sampler

Subelements:

<daodesc>

<head>

<p>

<daoloc> (set attribute HREF; fixed attribute LINKTYPE has value "locator")

<daodesc>

<p>

See Tag Library for full list of attributes and their values.

Tagging Example 1:

Representative images from NAACP visual materials collection

```
<daogrp>
  <daodesc>
    <head>Image Sampler</head>
    <p>Explanatory paragraph</p>
  </daodesc>
  <daoloc href="&lbphotos.box199;">
    <daodesc>
      <p>Ella Baker, head-and-shoulders portrait</p>
    </daodesc>
  </daoloc>
</daogrp>
```

Display Of Tagging Example 1:

```
Image Sampler

Explanatory paragraph

[ACTUAL IMAGE]
Ella Baker, head-and-shoulders portrait
```

Comments:

- Use <daogrp> and its subelement <daoloc> for one or more archival objects. This practice conforms to the RLG Best Practice Guidelines.
- See Section 2.2.2 for instructions on naming and declaring entities for external linking.

Order: Last element in Collection Summary

Revision Date: 05/01/08

3.3.2 Controlled Vocabulary Terms

Tag:

`<controlaccess>`

Description:

A wrapper element that groups key access points for the described materials and enables authority-controlled searching across finding aids in a computer network. These elements can be provided in a single list or be grouped into categories as appropriate. Discussion of attributes, groupings, individual `<controlaccess>` subelements, and the use of these subelements elsewhere within the finding aid will be found in Sections 3.3.2.1-3.3.2.7.

LC Practice recommends inclusion of controlled vocabulary terms to promote resource discovery when searching the finding aid database and in browsing name and subject lists generated from these terms.

See Also:

Section 3.3.1.4, Origination [Go To Section](#)

Section 3.3.1.5, Physical Description [Go To Section](#)

Section 3.3.4, Biographical Sketches and Agency Histories [Go To Section](#)

Section 3.3.5, Scope and Content Note [Go To Section](#)

Labels/heads:

Choose appropriate `<head>` for overall section, such as:

- Selected Search Terms
- Key Subjects
- Key Subjects and Formats
- Search Terms

Subelements:

All elements are repeatable except `<head>`. Inclusion of all subject and added entry terms from the collection-level catalog record is recommended.

`<head>` **Required**

`<note>` **Recommended**

`<persname>` See 3.3.2.2, Personal, Corporate, Family, and Geographic Names

`<corpname>` See 3.3.2.2, Personal, Corporate, Family, and Geographic Names

`<famname>` See 3.3.2.2, Personal, Corporate, Family, and Geographic Names

`<geogname>` See 3.3.2.2, Personal, Corporate, Family, and Geographic Names

`<name>` See 3.3.2.2, Personal, Corporate, Family, and Geographic Names

`<genreform>` See 3.3.2.3, Form and Genre Terms

`<function>` See 3.3.2.4, Function and Occupation Terms

<occupation> See 3.3.2.4, Function and Occupation Terms

<subject> See 3.3.2.5, Subjects and Titles

<title> See 3.3.2.5, Subjects and Titles

Tagging Example 1:

Single list of <controlaccess> terms at collection level

```
<controlaccess>
<head>Key Subjects and Formats</head>
<note>
  <p>The following terms have been used to index the description of
  this collection in the Library's online catalog:</p> </note>
  <subject source="lctgm" encodinganalog="650">Civil rights
  leaders.</subject>
  <corpname source="lcnaf" encodinganalog="610"
  role="subject">National Association for the Advancement of Colored
  People.</corpname>
  <genreform source="gmgpc" encodinganalog="655">Portraits.</genreform>
  <geogname source="lcsb" encodinganalog="651">United States--Race
  relations.</geogname>
</controlaccess>
```

Display Of Tagging Example 1:

Single list of <controlaccess> terms at collection level

```
Key Subjects and Formats

The following terms have been used to index the description of this
collection in the Library's online catalog:

Civil rights leaders.
National Association for the Advancement of Colored People.
Portraits.
United States--Race relations.
```

Comments:

- Controlled access terms are an important means of providing uniform searchability of encoded finding aids. At a minimum, the same controlled access terms should be encoded in EAD as in the MARC record for the collection. Failure to include such terms will result in the omission of key names and subjects from browse lists for LC finding aids, and will hinder searching based on the presence of such terms.
- Controlled access terms are most commonly listed at the collection level in a collection-level finding aid. They may also be assigned to their most specific descriptive level, as multilevel description allows. For instance, subject access may be provided at the series level when that topic is represented in only that series. However, the added expenses in identifying these specific headings and maintaining them in multiple locations in a finding aid make this option less attractive than it might be from a purely intellectual standard.
- Consider the order of terms used within a single list or a grouped list. See 3.3.2.6 for discussion of grouped access terms. Terms might be sorted alphabetically, in order by MARC encoding analog and alphabetically therein, or by preponderance within the collection. Listings should not be confusing to researchers in having no apparent order. On the other hand, major manipulation of order given in the MARC catalog record adds to encoding overhead.

- An introductory note explaining the nature and source of the search terms will aid researchers in understanding this potentially confusing list. This note may be put directly within paragraph tags but preferred practice is to encode as a note, for better manipulation of its display. See Example 1.

Repeatable: yes (and recursive)

Order: following <did> and preceding <descgrp type="admininfo">

Revision Date: 2/26/03

3.3.2.1 Use of Attributes in <controlaccess> Subelements

Description:

Using the SOURCE, ENCODINGANALOG, and ROLE attributes will increase the precision and usability of information recorded in <controlaccess> subelements such as <persname>, <subject>, etc. by permitting better crosswalks and mapping of data between finding aids and MARC catalog records, as well as more precise indexing.

See Also:

Section 3.3.1.4, Origination [Go To Section](#)

Other Attributes:

- source (code list of values: aat, cdwa, dot, gmGPC, lcnaf, lcsh, lctgm, local, mesh, mim, ncarules, nmc, rbgenr, tgn, ulan) **Required**, except when RULES are given instead
- encodinganalog **Required**
- role (can use role="subject" to distinguish names used as subjects, i.e., 6xx fields, from names used as added entries, i.e., 7xx fields. Use role="collector" for names of originators acting as collectors and role="creator" for originators acting as creators, whether personal or corporate, and whether main or added entry) **Recommended**
- rules (code list of values: aacr2, rad) **Recommended** in lieu of SOURCE as appropriate

See Tag Library for full list of attributes and their values.

Tagging Example 1:

Attributes used are SOURCE, ENCODINGANALOG, ROLE, and RULES

```
<controlaccess>
<head>Selected Search Terms</head>
<persname source="lcnaf" encodinganalog="100" role="creator">Astin,
Allen Varley, 1904-1984.</persname>
<famname source="lcnaf" encodinganalog="600" role="subject">Astin
family.</famname>
<persname source="lcnaf" encodinganalog="700">Astin,
John. Papers.</persname>
<persname source="local" rules="aacr2" encodinganalog="700">Biv, Roy
G., 1951- . Papers.</persname>
<geogname source="lcsh" encodinganalog="651" role="subject">Great
Britain--Armed Forces.</geogname>
<occupation source="itoamc" encodinganalog="656">Physicists</occupation>
<subject source="lcsh" encodinganalog="650">Proximity
fuzes.</subject>
<subject source="lcsh" encodinganalog="650">Science--International
cooperation.</subject>
<persname source="lcnaf" encodinganalog="600" role="subject">Sikorsky, Igor Ivan,
1889-1972--Correspondence.</persname>
<corpname source="lcnaf" encodinganalog="610" role="subject">United
```

```
States. National Bureau of Standards.</corname>
</controlaccess>
```

Display Of Tagging Example 1:

Attributes used are SOURCE, ENCODINGANALOG, ROLE, and RULES

Selected Search Terms

```
Astin, Allen Varley, 1904-1984.
Astin family.
Astin, John. Papers.
Biv, Roy G., 1951- . Papers.
Great Britain--Armed Forces.
Physicists.
Proximity fuzes.
Science--International cooperation.
Sikorsky, Igor Ivan, 1889-1972--Correspondence.
United States. National Bureau of Standards.
```

Comments:

- As the purpose of <controlaccess> is to enable searching by terms used nationally and internationally, make every effort to use controlled vocabulary as index terms.
- In most cases, the value of the SOURCE attribute will come from the standard authority sources listed above. If subject terms must be used which are not found in these sources, set the SOURCE attribute to name the other thesaurus, which may be locally maintained. Please report such values to the EAD Technical Group to be added to LC templates and other local tools.
- If subject terms must be used which are not found in any extant thesaurus, set the value on the SOURCE attribute as "local."
- The ROLE attribute may be set to indicate relationships expressed in relator terms (e.g., collector, contributor) as well as that a name is functioning as a subject. See Section 3.3.1.4 for discussion of using the ROLE attribute in for creators and collectors in <origination> in conjunction with or in place of recording the relator terms as PCDATA.
- The RULES attribute can be used to specify the descriptive rules followed when formulating the term, such as "acr2" or "rad". This attribute is optional and should be used only when the term is not already found in a standard authority list or thesaurus identified with the SOURCE attribute, such as a term formulated following the provisions of AACR2 but not found in the LCNAF.
- Note: since the RELATEDENCODING attribute has already been set to "MARC21" at the <archdesc> level, it is not necessary to include "MARC21" as part of the ENCODINGANALOG attribute.

Revision Date: 05/05/08

3.3.2.2 Personal, Corporate, Family, and Geographic Names**Tag:**

```
<persname>
<corname>
<famname>
<geogname>
```

<name>

Description:

Personal names, corporate names, family names, and geographic names in their authorized form (as found in the LC Name Authority File, LCSH, or other sources) are encoded exactly as found in that source in the <controlaccess> section, whether in a single alphabetical list or grouped into categories. A nonspecific element, <name>, may also be used when a name seems particularly significant, but it is not known what kind of name is being described (e.g., personal, corporate, or geographic). Since a name being specifically encoded can be identified by type using the authority files, use of this element should be rare, especially within <controlaccess>.

See Also:

Section 3.3.2.1, Use of Attributes in <controlaccess> Subelements [Go To Section](#)

Encoding Analog:

100, 600, or 700 with <persname> or <famname> (main, subject, or added entry); 110, 610, or 710 with <corpname> (main, subject, or added entry); 611 with <corpname> (conference or meeting subject entry); 651 with <geogname>

Other Attributes:

- source="lcnaf" (in most cases) **Required**
- role="subject" (if 6xx field) **Recommended**
- role="creator" or "collector" (if originator) **Recommended**
- rules

See Tag Library for full list of attributes and their values.

Tagging Example 1:

Attributes used are SOURCE, ENCODINGANALOG, and ROLE

```
<head>Selected Search Terms</head>
<persname source="lcnaf" encodinganalog="100" role="creator">Astin,
Allen Varley, 1904-1984.</persname>
<famname source="lcnaf" encodinganalog="600" role="subject">Astin
family.</famname>
<persname source="lcnaf" encodinganalog="700">Astin,
John. Papers.</persname>
<persname source="lcnaf" encodinganalog="600" role="subject">Bunche,
Ralph J. (Ralph Johnson), 1904-1971.</persname>
<geogname source="lcnaf" encodinganalog="651" role="subject">Great
Britain--Armed Forces.</geogname>
<persname source="lcnaf" encodinganalog="600" role="subject">Sikorsky,
Igor Ivan, 1889-1972--Correspondence.</persname>
<corpname source="lcnaf" encodinganalog="610" role="subject">United
States. Dept. of State. Bureau of African Affairs.</corpname>
<corpname source="lcnaf" encodinganalog="610" role="subject">United
States. National Bureau of Standards.</corpname>
```

Display Of Tagging Example 1:

Attributes used are SOURCE, ENCODINGANALOG, and ROLE

```
Selected Search Terms

Astin, Allen Varley, 1904-1984.
```

```
Astin family.
Astin, John. Papers.
Bunche, Ralph J. (Ralph Johnson), 1904-1971.
Great Britain--Armed Forces.
Sikorsky, Igor Ivan, 1889-1972--Correspondence.
United States. Dept. of State. Bureau of African Affairs.
United States. National Bureau of Standards.
```

Tagging Example 2:

Corporate names with subdivisions encoded using `<subarea>`

```
<head>Selected Search Terms</head>
<corpname source="lcnaf" encodinganalog="610$a" role="subject">United States.<subarea
encodinganalog="610$b">Dept. of State. Bureau of African Affairs.</subarea></corpname>
<corpname source="lcnaf" encodinganalog="610$a" role="subject">United States. <subarea
encodinganalog="610$b">National Bureau of Standards.</subarea></corpname>
```

Display Of Tagging Example 2:

Corporate names with subdivisions encoded using `<subarea>`

```
Selected Search Terms

United States. Dept. of State. Bureau of African Affairs.
United States. National Bureau of Standards.
```

Comments:

- Use the complete form of the name as it appears in the authority record (inverted order, birth and death dates if given, titles of address, etc.). Note also that titles of works associated with personal names are not separately encoded. See Example 1.
- Repeat the main entry (1xx field) from `<origination>` to ensure that the browse list of names built from `<controlaccess>` includes all important terms. Use all the attributes specified for use in `<controlaccess>`, which will be more than are required within `<origination>`. See Example 1.
- It is possible to use `<subarea>` within `<corpname>` for corporate names with subordinate units. Unlike the `<repository>` area, where use of `<subarea>` is required because of its immediate usefulness, this specific coding is an option in `<controlaccess>`. See Example 1 for `<corpname>` not using `<subarea>`. Please note in Example 2, which uses `<subarea>`, that appropriate MARC subfields must be specified in the ENCODINGANALOG in this case.

Repeatable: yes

Order: within `<controlaccess>`

Revision Date: 3/5/03

3.3.2.3 Form and Genre Terms

Tag:

```
<genreform>
```

Description:

Controlled vocabulary terms for describing collections by type of material or physical characteristics. Sources for these form and genre terms may come from specialized thesauri, such as those for graphic materials, or from LCSH.

See Also:

Section 3.3.2.1, Use of Attributes in <controlaccess> Subelements [Go To Section](#)

Encoding Analog: 655**Other Attributes:**

source="aat", "gmgpc", "lch", or other as appropriate **Required**

See Tag Library for full list of attributes and their values.

Tagging Example 1:

Genre terms taken from Thesaurus for Graphic Materials II

```
<controlaccess>
  <head>Selected Search Terms</head>
  <genreform source="gmgpc" encodinganalog="655">Portrait photographs--1860-1970.</genreform>
  <genreform source="gmgpc" encodinganalog="655">Group portraits--1860-1970.</genreform>
  <genreform source="gmgpc" encodinganalog="655">Photographic prints--1860-1970.</genreform>
  <genreform source="gmgpc" encodinganalog="655">Posters.</genreform>
</controlaccess>
```

Display Of Tagging Example 1:

Genre terms taken from Thesaurus for Graphic Materials II

```
Selected Search Terms

Portrait photographs--1860-1970.
Group portraits--1860-1970.
Photographic prints--1860-1970.
Posters.
```

Repeatable: yes

Order: within <controlaccess>

Revision Date: 09/17/03

3.3.2.4 Function and Occupation Terms

Tag:

<[function](#)>

<[occupation](#)>

Description:

Function terms <[function](#)>, describing the spheres of activities and organizational processes that generated the described records, are useful in corporate, government, and institutional archives, but have not been used at the Library. Occupation terms <[occupation](#)> identify the profession, business, or avocation of individuals in personal papers and are used at the Library.

See Also:

Section 3.3.2.1, Use of Attributes in <controlaccess> Subelements [Go To Section](#)

Encoding Analog: 656 for <occupation>; 657 for <function>

Other Attributes:

- source="lclsh", "itoamc" (an occupation thesaurus locally maintained by the Manuscript Division), or other as appropriate **Required**
- rules

See Tag Library for full list of attributes and their values.

Tagging Example 1:

Occupations of originator listed using local Manuscript Division thesaurus

```
<controlaccess>
<head>Selected Search Terms</head>
<occupation source="itoamc" encodinganalog="656">Abolitionists.</occupation>
<occupation source="itoamc" encodinganalog="656">Diplomats.</occupation>
<occupation source="itoamc" encodinganalog="656">Journalists.</occupation>
</controlaccess>
```

Display Of Tagging Example 1:

```
Selected Search Terms

Abolitionists.
Diplomats.
Journalists.
```

Repeatable: yes

Order: within <controlaccess>

Revision Date: 7/11/03

3.3.2.5 Subjects and Titles**Tag:**

<[subject](#)>

<[title](#)>

Description:

Topical subjects and titles of works in their authorized form (as found in the LCSH, the LC Name Authority File, or other sources) are encoded exactly as found in that source in the <[controlaccess](#)> section, whether in a single alphabetical list or grouped into categories. Remember that names when used as subjects are encoded as <[persname](#)> etc., with the ROLE attribute set to "subject."

See Also:

Section 3.3.2.1, Use of Attributes in <controlaccess> Subelements [Go To Section](#)

Section 3.3.2.2, Personal, Corporate, Family and Geographic Names [Go To Section](#)

Encoding Analog: 630 with <title>; 650 with <subject>

Other Attributes:

- source="lcs" , "lctgm" , "gmGPC" , "lcnaf" for <subject> **Required**
- source="lcnaf" for <title> or other as appropriate **Required**
- rules

See Tag Library for full list of attributes and their values.

Tagging Example 1:

Attributes used are SOURCE and ENCODINGANALOG

```
<controlaccess>
<head>Selected Search Terms</head>
<subject source="lcs" encodinganalog="650">Afro-American
newspapers--New York (State)--Rochester.</subject>
<subject source="lctgm" encodinganalog="650">Civil rights
leaders.</subject>
<title source="lcnaf" encodinganalog="630">North star (Rochester,
N.Y.)</title>
</controlaccess>
```

Display Of Tagging Example 1:

Attributes used are SOURCE and ENCODINGANALOG

```
Selected Search Terms

Afro-American newspapers--New York (State)--Rochester.
Civil rights leaders.
North star (Rochester, N.Y.)
```

Repeatable: yes

Order: within <controlaccess>

Revision Date: 7/31/03

3.3.2.6 Use of Grouped Controlled Vocabulary Terms

Description:

Controlled vocabulary terms may be given in a single list of terms, or may be grouped according to the needs of the collection and the needs of the division by means of nesting <controlaccess> clusters within a single <controlaccess>. Each division may choose a usual pattern of grouping, or may modify the groups at need for each finding aid. Explanatory notes may be attached to each grouping to explain its contents and purpose.

See Also:

Section 3.3.2.1, Use of Attributes in <controlaccess> Subelements [Go To Section](#)

Labels/heads:

Use the <head> elements appropriate to each grouping under the parent <controlaccess> which has its own head, (e.g., "Selected Search Terms"). The two examples below illustrate how headings may be used with particular groupings.

Example 1:

- Names (100, 600, 610, 611, 700, 710, 711)
- Subjects (630, 650, 651, 655)
- Occupations (656)

Example 2:

- Personal Names (100, 600)
- Organizations (110, 111, 610, 611)
- Subjects (650)
- Locations (651)
- Related Names (7xx)
- Genres (655)
- Occupations (656)

Tagging Example 1:

Controlled access terms alphabetically listed as names, subjects, and occupations

```

<controlaccess>
<head>Selected Search Terms</head>
<note>
<p>The following terms have been used to index the description of
this collection in the Library's online catalog. They are grouped
alphabetically by name of person, family, or organization, by
topical subject or place, and by occupation.</p>
</note>
<controlaccess>
<head>Names:</head>
<corpname source="lcnaf" encodinganalog="610" role="subject">American
Anti-Slavery Society.</corpname>
<persname source="lcnaf" encodinganalog="700">Anthony, Mary
S. Mary S. Anthony papers</persname>
<persname source="lcnaf" encodinganalog="100" role="creator">Anthony,
Susan B. (Susan Brownell), 1820-1906.</persname>
<famname source="lcnaf" encodinganalog="600" role="subject">Blackwell
family.</famname>
<persname source="lcnaf" encodinganalog="600" role="subject">Bloomer, Amelia
Jenks, 1818-1894.</persname>
<corpname source="lcnaf" encodinganalog="710">Doubleday and Company,
inc. Doubleday and Company records.</corpname>
<corpname source="lcnaf" encodinganalog="711">Inter-American Conference
for the maintenance of peace, Buenos Aires, 1936. Records.</corpname>
<persname source="lcnaf" encodinganalog="600" role="subject">Lincoln, Abraham,
1809-1865--Assassination.</persname>
<persname source="lcnaf" encodinganalog="600" role="subject">Mott, Lucretia,
1793-1880.</persname>
<corpname source="lcnaf" encodinganalog="610" role="subject">National American
Woman Suffrage Association.</corpname>
<corpname encodinganalog="611" role="subject">Pan-American Conference (1933 :
Montevideo, Uruguay)</corpname>
</controlaccess>
<controlaccess>
<head>Subjects:</head>

```



```

<subject source="lcsh" encodinganalog="650">Afro-Americans--Suffrage.</subject>
<subject encodinganalog="630" source="lcnaf">Lexington observer and reporter.</subject>
<genreform encodinganalog="655" source="gmgpc">Portraits.</genreform>
<subject source="lcsh" encodinganalog="650">Temperance.</subject>
<geogname source="lcsh" encodinganalog="651">United
States--Politics and government--19th century.</geogname>
<subject source="lcsh" encodinganalog="650">Women--Suffrage.</subject>
<subject source="lcsh" encodinganalog="650">Women's rights.</subject>
</controlaccess>
<controlaccess>
<head>Occupations:</head>
<occupation source="itoamc" encodinganalog="656">Reformers.</occupation>
<occupation source="itoamc" encodinganalog="656">Suffragists.</occupation>
</controlaccess>
</controlaccess>

```

Display Of Tagging Example 1:

Controlled access terms alphabetically listed as names, subjects, and occupations

Selected Search Terms

The following terms have been used to index the description of this collection in the Library's online catalog. They are grouped alphabetically by name of person, family, or organization, by topical subject or place, and by occupation.

Names:

American Anti-Slavery Society.
 Anthony, Mary S. Mary S. Anthony papers.
 Anthony, Susan B. (Susan Brownell), 1820-1906.
 Blackwell family.
 Bloomer, Amelia Jenks, 1818-1894.
 Doubleday and Company, inc. Doubleday and Company, inc. records.
 Inter-American Conference for the maintenance of peace, Buenos Aires, 1936. Records.
 Lincoln, Abraham, 1809-1865--Assassination.
 Mott, Lucretia, 1793-1880.
 National American Woman Suffrage Association.
 Pan-American Conference (1933 : Montevideo, Uruguay)

Subjects:

Afro-Americans--Suffrage.
 Lexington observer and reporter.
 Portraits.
 Temperance.
 United States--Politics and government--19th century.
 Women--Suffrage.
 Women's rights.

Occupations:

Reformers.
 Suffragists.

Tagging Example 2:

Controlled access terms alphabetically listed in numerous groups

```

<controlaccess>
<head>Selected Search Terms</head>
<note>
<p>The following terms have been used to index the description of
this collection in the Library's online catalog. They are grouped
by name of person, organization, subject, location, related names,
genres, and occupations and listed alphabetically therein.</p>
</note>
<controlaccess>
<head>Personal Names:</head>
<famname source="lcnaf" encodinganalog="100" role="creator">Blackwell
family.</famname>
<persname source="lcnaf" encodinganalog="600" role="subject">Bloomer, Amelia Jenks,
1818-1894.</persname>
<persname source="lcnaf" encodinganalog="600" role="subject">Lincoln, Abraham,
1809-1865--Assassination.</persname>
<persname source="lcnaf" encodinganalog="600" role="subject">Mott, Lucretia,
1793-1880.</persname>
</controlaccess>
<controlaccess>
<head>Organizations:</head>
<corpname source="lcnaf" encodinganalog="610" role="subject">American Anti-Slavery
Society.</corpname>
<corpname source="lcnaf" encodinganalog="610" role="subject">National American
Woman Suffrage Association.</corpname>
<corpname source="lcnaf" encodinganalog="611" role="subject">Pan-American
Conference (1933 : Montevideo, Uruguay)</corpname>
</controlaccess>
<controlaccess>
<head>Subjects:</head>
<subject source="lcsb" encodinganalog="650">Afro-Americans--Suffrage.</subject>
<subject source="lcsb" encodinganalog="650">Antislavery
movements.</subject>
<subject source="lcsb" encodinganalog="650">Temperance.</subject>
<subject source="lcsb" encodinganalog="650">Women--Suffrage.</subject>
<subject source="lcsb" encodinganalog="650">Women's rights.</subject>
</controlaccess>
<controlaccess>
<head>Locations:</head>
<geogname source="lcsb" encodinganalog="651">Kentucky--Politics
and government--1792-1865.</geogname>
<geogname source="lcsb" encodinganalog="651">Kentucky--Politics
and government--1865-1951.</geogname>
<geogname source="lcsb" encodinganalog="651">Russia--Foreign
relations--United States.</geogname>
<geogname source="lcsb" encodinganalog="651">United
States--Foreign relations--Russia.</geogname>
<geogname source="lcsb" encodinganalog="651">United
States--Politics and government--19th century.</geogname>
</controlaccess>
<controlaccess>
<head>Related Names:</head>
<persname source="lcnaf" encodinganalog="700">Anthony, Mary
S. Mary S. Anthony papers.</persname>
<persname source="lcnaf" encodinganalog="700">Breckinridge, Joseph
Cabell, 1842-1920. Joseph Breckinridge Cabell papers.</persname>

```

```

<persname source="lcnaf" encodinganalog="700">Breckinridge,
Katherine Carson. Katherine Carson Breckinridge papers.</persname>
<corpname source="lcnaf" encodinganalog="710">Doubleday and
Company, inc. Doubleday and Company, inc. Records.</corpname>
<corpname source="lcnaf" encodinganalog="711">Inter-American
Conference for the maintenance of peace, Buenos Aires,
1936. Records.</corpname>
</controlaccess>
<controlaccess>
<head>Genres:</head>
<genreform source="gmgpc" encodinganalog="655">Portrait
photographs--1860-1970.</genreform>
<genreform source="gmgpc" encodinganalog="655">Group
portraits--1860-1970.</genreform>
</controlaccess>
<controlaccess>
<head>Occupations:</head>
<occupation source="itoamc" encodinganalog="656">Reformers.</occupation>
<occupation source="itoamc" encodinganalog="656">Suffragists.</occupation>
</controlaccess>
</controlaccess>

```

Display Of Tagging Example 2:

Controlled access terms alphabetically listed in numerous groups

Selected Search Terms

The following terms have been used to index the description of this collection in the Library's online catalog. They are grouped by name of person, organization, subject, location, related names, genres, and occupations and listed alphabetically therein.

Personal Names:

Blackwell family.
 Bloomer, Amelia Jenks, 1818-1894.
 Lincoln, Abraham, 1809-1865--Assassination.
 Mott, Lucretia, 1793-1880.

Organizations:

American Anti-Slavery Society.
 National American Woman Suffrage Association.
 Pan-American Conference (1933 : Montevideo, Uruguay)

Subjects:

Afro-Americans--Suffrage.
 Antislavery movements.
 Temperance.
 Women--Suffrage.
 Women's rights.

Locations:

Kentucky--Politics and government--1792-1865.
 Kentucky--Politics and government--1865-1951.
 Russia--Foreign relations--United States.
 United States--Foreign relations--Russia.
 United States--Politics and government--19th century.

Related Names:

Anthony, Mary S. Papers.
Breckinridge, Joseph Cabell, 1842-1920. Joseph Cabell Breckinridge papers.
Breckinridge, Katherine Carson. Katherine Carson Breckinridge papers.
Doubleday and Company, inc. Doubleday and Company, inc. records.
Inter-American Conference for the maintenance of peace, Buenos Aires, 1936. Records.

Genres:

Portrait photographs--1860-1970.
Group portraits--1860-1970.

Occupations:

Reformers.
Suffragists.

Comments:

- When grouping access terms, consider whether a smaller or larger group is most appropriate. For instance, one may use a small number of groups where access terms are not numerous or are of relatively few types. See Example 1.
- If the list is longer and more complex, and if considerable work might be needed to move terms into an understandable order within a few groups, consider using more groups. See Example 2.
- The examples of groupings given are illustrative rather than prescriptive and care should be taken in determining divisional practice for such groupings.
- Consider the order of terms within each group. They might be sorted alphabetically by term, in order by MARC encoding analog and alphabetically therein, or by preponderance within the collection. Listings should not be confusing to researchers in having no apparent order. On the other hand, major manipulation of order given in the MARC catalog record adds to encoding overhead.
- An introductory note explaining the nature and source of the search terms will aid researchers in understanding this potentially confusing list. This note may be put directly within paragraph tags, but the preferred practice is to encode as a note, for better manipulation of its display. See Example 1 and Example 2. There might be one note at the beginning of the section, and a note about the contents of each group within that group, if desired.

Repeatable: yes

Revision Date: 2/26/03

3.3.2.7 Use of Controlled Vocabulary Outside of <controlaccess>

Description:

It is possible to encode names and subjects (i.e., <persname>, <geogname>, <subject>) in context in portions of the finding aid beyond the special <controlaccess> section provided for their use.

LC Practice recommends that key access terms need not be encoded as such outside the <controlaccess> section; see comments below. Exceptions are to encode repository as <corpname> and originator as <persname>, <famname> or <corpname> in Collection Summary.

See Also:

Section 3.3.8.3, Indexes [Go To Section](#)

Tagging Example 1:

ROLE attributes given for <geogname> exported from a database to the Container List

<c02>

```

<did>
<unittitle>
<geogname role="city">Cannon Beach</geogname>
<geogname role="county">Clatsop County</geogname>
<unitdate normal="1990-08">8/1990</unitdate>
<unitdate normal="1998-08">8/1998</unitdate>
</unittitle>
</did>
</c02>

```

Display Of Tagging Example 1:

ROLE attributes given for `<geogname>` exported from a database to the Container List

```

Cannon Beach Clatsop County
8/1990
8/1998

```

Comments:

- If names and subjects are already identified as such in the source data (e.g., a database with fielded data easily mapped to `<persname>`, `<corpname>`, or `<geogname>`), this data may be exported using the appropriate tags. In these cases, access terms are tagged and NORMAL attributes are supplied, if needed. No other attributes need be given in circumstances where it is easy to identify names as such but harder to provide authorized forms. Example 1 illustrates a container list of material organized geographically which has been exported from a database; other databases may contain personal names and corporate names as fielded data.
- Names may also be encoded in indexes when circumstances warrant. See Section 3.3.8.3.
- Most but not all significant names and subjects should already be included in the catalog record and encoded in `<controlaccess>`. If desired, additional names and subjects can be added to `<controlaccess>` in their authorized forms with SOURCE and ENCODINGANALOG attributes set. Remember that current browse lists are one form of output of `<controlaccess>`; in a print version, indexes might be generated from the normalized tagged data.

Revision Date: 05/01/08

3.3.3 Administrative Information

Tag:

```
<descgrp type="admininfo">
```

Description:

This wrapper element assembles background information that users may need to gain access to the archival materials, place the materials in context, and make use of the information contained therein. This information also assists repositories in some aspects of collection management. Administrative information may have been recorded in multiple places in legacy finding aids but should be pulled together in the EAD finding aid.

Elements listed below fall into several general groups, which may be thought of describing the collection in the following terms:

- Where it came from: `<acqinfo>`, `<custodhist>`, `<accruals>`
- What the repository did with it: `<processinfo>`, `<appraisal>`
- What users can do with it: `<userrestrict>`, `<accessrestrict>`
- Formats available for use: `<altformavail>`

- How to cite: <prefercite>

LC Practice requires the inclusion of administrative information within the generic grouping element <descgrp type="admininfo"> bundle in LC finding aids. Although EAD 2002 makes these elements available directly within <archdesc>, we have found it useful to hold this key information together in a labelled section of the finding aid. The new elements <originalsloc> and <phystech> may be grouped within this <descgrp> as well as used within components.

See Also:

Section 3.3.7.4, Expanded Description of Components [Go To Section](#)

Labels/heads:

Recommended content of required <head>:

- Administrative Information

Subelements:

Recommended order. Use of subelements should follow divisional policies. All subelements except <head> may be repeated.

<head> **Required**

<acqinfo> **Required** See 3.3.3.1, Acquisition Information

<custodhist> **Recommended if applicable** See 3.3.3.2, Custodial History

<accruals> See 3.3.3.3, Accruals

<processinfo> See 3.3.3.4, Processing Information

<appraisal> See 3.3.3.5, Appraisal

<userrestrict> **Required if applicable/Recommended** See 3.3.3.6, Conditions Governing Use

<accessrestrict> **Required if applicable/Recommended** See 3.3.3.7, Conditions Governing Access

<phystech> See Tag Library

<altformavail> **Required if applicable** See 3.3.3.8, Alternate Form of the Materials Available

<originalsloc> See Tag Library

<prefercite> **Recommended** See 3.3.3.9, Preferred Citation of the Material

Tagging Example 1:

Heads provided for subelements

```
<descgrp type="admininfo">
  <head>Administrative Information</head>
  <acqinfo encodinganalog="541">
    <head>Provenance</head>
    <p>The papers of Susan Q. Archivista, archivist and philanthropist, were given to the Library of Congress by Josiah Quincy and Sally Rae Archivista in 1978. An addition to the collection includes items purchased by the Library in 1998.</p>
  </acqinfo>
  <custodhist encodinganalog="561">
    <head>Custodial History</head>
    <p>The collection consists essentially of those papers which were in Archivista's library at the time of her death in 1980. They relate principally to her career during and after the
```

Cold War. Of her earlier papers, the bulk was destroyed when her house in Rochester, New York, exploded in 1972.</p>
</custodhist>
<accruals encodinganalog="584">
<head>Accruals</head>
<p>No further accruals are expected to this collection.</p>
</accruals>
<processinfo encodinganalog="583">
<head>Processing History</head>
<p>Part I of the papers of Susan Q. Archivista was processed and described in 1978. Additional material received in 1998 was processed as Part II in 1999. A description of the Archivista Papers appears in <title>Library of Congress Information Bulletin, </title> 48 (18 September 1989), pp. 321-322.</p>
</processinfo>
<separatedmaterial encodinganalog="544 0">
<head>Transfers</head>
<p>Some photographs have been transferred to the Library's Prints and Photographs Division where they are identified as a part of these papers.</p>
</separatedmaterial>
<appraisal encodinganalog="583\$a">
<head>Appraisal</head>
<p>Duplicates and extraneous material have been returned to the donor in accordance with the instrument of gift.</p>
</appraisal>
<userrestrict encodinganalog="540">
<head>Copyright Status</head>
<p>The status of copyright in the unpublished writings of Susan Q. Archivista is governed by the Copyright Law of the United States (Title 17, U.S.C.).</p>
</userrestrict>
<userrestrict encodinganalog="540">
<head>Restrictions</head>
<p>Restrictions apply concerning the use, photoduplication, or publication of items in this collection. Consult a reference librarian in the Manuscript Division for information concerning these restrictions.</p>
</userrestrict>
<accessrestrict encodinganalog="506">
<head>Security Classified Documents</head>
<p>Government regulations control the use of security classified material in this collection. Manuscript Division staff can furnish information concerning access to and use of classified items.</p>
</accessrestrict>
<phystech encodinganalog="538">
<head>System Requirements</head>
<p>IBM-compatible PC; 4MB RAM; Windows 3.1 or higher; CD-ROM drive with Microsoft extensions (MSCDEX 2.1 or greater); 12MB free hard disk space.</p>
</phystech>
<altformavail encodinganalog="530">
<head>Microfilm</head>
<p>A microfilm edition of these papers is available on seventeen reels. Consult a reference librarian in the Manuscript Division concerning availability for purchase or interlibrary loan.</p>
</altformavail>
<originalsloc encodinganalog="535">
<head>Location of Originals</head>

```

<p>The collection includes microfilmed Archivista correspondence
with Roy G. Biv reproduced from the Biv Papers at the University
of Ashtabula.</p>
</originalsloc>
<prefercite encodinganalog="524">
  <head>Preferred Citation</head>
  <p>Researchers wishing to cite this collection should include
the following information: Container number, Susan Q. Archivista
Papers, Manuscript Division, Library of Congress, Washington,
D.C.</p>
</prefercite>
</descgrp>

```

Display Of Tagging Example 1:

Heads provided for subelements; colons following heads supplied by stylesheet

Administrative Information

Provenance: The papers of Susan Q. Archivista, archivist and philanthropist, were given to the Library of Congress by Josiah Quincy and Sally Rae Archivista in 1978. An addition to the collection includes items purchased by the Library in 1998.

Custodial History: The collection consists essentially of those papers which were in Archivista's library at the time of her death in 1980. Of her earlier papers, the bulk was destroyed when her house in Rochester, New York, exploded in 1972.

Accruals: No further accruals are expected to this collection.

Processing History: Part I of the papers of Susan Q. Archivista was processed and described in 1978. Additional material received in 1998 was processed as Part II in 1999. A description of the Archivista Papers appears in the Library of Congress Information Bulletin, 48 (18 September 1989), pp. 321-322.

Transfers: Some photographs have been transferred to the Library's Prints and Photographs Division where they are identified as a part of these papers.

Appraisal: Duplicates and extraneous material have been returned to the donor in accordance with the instrument of gift.

Copyright Status: The status of copyright in the unpublished writings of Susan Q. Archivista is governed by the Copyright Law of the United States (Title 17, U.S.C.).

Restrictions: Restrictions apply concerning the use, photoduplication, or publication of items in this collection. Consult a reference librarian in the Manuscript Division for information concerning these restrictions.

Security Classified Documents: Government regulations control the use of security classified material in this collection. Manuscript Division staff can furnish information concerning access to and use of classified items.

System Requirements: IBM-compatible PC; 4MB RAM; Windows 3.1 or higher;

CD-ROM drive with Microsoft extensions (MSCDEX 2.1 or greater); 12MB free hard disk space.

Microfilm: A microfilm edition of these papers is available on seventeen reels. Consult a reference librarian in the Manuscript Division concerning availability for purchase or interlibrary loan.

Location of Originals: The collection includes microfilmed correspondence between Archivista and Roy G. Biv reproduced from the Biv Papers at the University of Ashtabula.

Preferred Citation: Researchers wishing to cite this collection should include the following information: Container number, Susan Q. Archivista Papers, Manuscript Division, Library of Congress, Washington, D.C.

Comments:

- Administrative information elements, normally enclosed within the `<descgrp>` wrapper, may also be tagged separately. For example, if there were a need for `<accessrestrict>` to appear after the collection summary but for the `<custodhist>` to appear after the `<bioghist>`, each of those elements could be entered directly or included in a `<descgrp>` wrapper which includes any elements except those subordinate to `<dsc>` or `<did>`.
- Similarly, other elements such as those formerly subordinate to `<add>` may be included in the `<descgrp>` wrapper used for administrative information. For example, `<separatedmaterial>` describing transfers to other Library divisions could be included in this wrapper.
- Administrative elements may be repeated to provide appropriate heads for each paragraph, such as a copyright statement and other restrictions on use. It is recommended but not required that these elements occur sequentially. See Example 1.
- Administrative information subelements may also be used at the component level, for instance to indicate that a particular series is available on microfilm. See also 3.3.7.4, Expanded Description of Components.

Repeatable: yes (and recursive)

Order: following `<did>` and preceding `<bioghist>`

Revision Date: 5/2/08

3.3.3.1 Acquisition Information

Tag:

`<acqinfo>`

Description:

Information about the immediate source of collection materials and the circumstances (e.g., gift, transfer, purchase, deposit) under which materials were received.

LC practice requires the inclusion of acquisition information within `<descgrp type="admininfo">`.

Labels/heads:

Recommended content of required `<head>`:

- Provenance

Encoding Analog: 541

Tagging Example 1:

Materials acquired by various methods

```
<acqinfo encodinganalog="541">
<head>Provenance</head>
<p>The papers of Caleb Cushing, lawyer, author, and diplomat, were given to
the Library of Congress by his niece, Margaret W. Cushing,
1935-1942. Several small additions have been acquired through purchase,
gift, and transfer, 1906-1995.</p>
</acqinfo>
```

Display Of Tagging Example 1:

Materials acquired by various methods

Provenance: The papers of Caleb Cushing, lawyer, author, and diplomat, were given to the Library of Congress by his niece, Margaret W. Cushing, 1935-1942. Several small additions have been acquired through purchase, gift, and transfer, 1906-1995.

Comments:

Do not confuse with [<custodhist>](#), which describes the physical and intellectual custody of collection materials prior to their receipt by the repository.

Order: first subelement within `<descgrp type="admininfo">`

Revision Date: 03/05/03

3.3.3.2 Custodial History**Tag:**

[<custodhist>](#)

Description:

Information about the previous chain of custody of the collection materials described; this may describe both physical possession and intellectual custody of materials that may assist a researcher in determining the authenticity and interpretation of such materials. This description supplements information pertaining to the receipt of collection material at LC, which is recorded in [<acqinfo>](#).

LC practice recommends the inclusion of custodial history where applicable within `<descgrp type="admininfo">`.

Labels/heads:

Recommended content of required [<head>](#):

- Custodial History

Encoding Analog: 561

Tagging Example 1:

Illustrating relationship between [<acqinfo>](#) and [<custodhist>](#)

```
<acqinfo encodinganalog="541">
<head>Provenance</head>
<p>The papers of Frederick Douglass, abolitionist, orator, journalist,
```

diplomat, and public official, were acquired by the Library of Congress by transfer and gift. In response to a request from the Librarian of Congress, the Park Service transferred the papers to the Library of Congress between 1972 and 1974. A small addition given to the Library by Fannie Douglass in 1973 was organized and described with the main collection received from the Park Service.

...</p>

</acqinfo>

<custodhist encodinganalog="561">

<head>Custodial History</head>

<p>The collection consists essentially of those papers which were in Douglass's library at the time of his death in 1895. They relate principally to his career during and after the Civil War. Of his earlier papers, the bulk was destroyed when his house in Rochester, New York, burned in 1872. ...</p>

</custodhist>

Display Of Tagging Example 1:

Illustrating relationship between <acqinfo> and <custodhist>

Provenance

The papers of Frederick Douglass, abolitionist, orator, journalist, diplomat, and public official, were acquired by the Library of Congress by transfer and gift. In response to a request from the Librarian of Congress, the Park Service transferred the papers to the Library of Congress between 1972 and 1974. A small addition given to the Library by Fannie Douglass in 1973 was organized and described with the main collection received from the Park Service. ...

Custodial History

The collection consists essentially of those papers which were in Douglass's library at the time of his death in 1895. They relate principally to his career during and after the Civil War. Of his earlier papers, the bulk was destroyed when his house in Rochester, New York, burned in 1872. ...

Comments:

This element has not yet been used at LC.

Order: following <acqinfo> and preceding <accruals>

Revision Date: 3/5/03

3.3.3.3 Accruals

Tag:

<accruals>

Description:

Information about anticipated additions to the materials being described, such as date, frequency, or quantity of anticipated additions. Repositories may wish to indicate simply that future additions to a collection are expected, or conversely, that no further additions are expected.

LC practice requires that if this element is used, it should be bundled within `<descgrp type="admininfo">`.

Labels/heads:

Recommended content of required `<head>`:

- Accruals

Encoding Analog: 584

Tagging Example 1:

Collection is complete (accruals not expected)

```
<accruals encodinganalog="584">
  <head>Accruals</head>
  <p>No further accruals are expected to this collection.</p>
</accruals>□
```

Display Of Tagging Example 1:

```
Accruals:          No further accruals are expected to this collection.
```

Comments:

- Used primarily for archival records; may be useful in other situations such as collections which accrue ongoing donations from a living donor or collections where new materials is received on a regular basis.

Repeatable: yes

Order: following `<custodhist>` and preceding `<processinfo>`

Revision Date: 3/05/03

3.3.3.4 Processing Information

Tag:

`<processinfo>`

Description:

Information about accessioning, arranging, describing, preserving, storing, or otherwise preparing the described materials for research use. This information may include:

- who processed the original collection materials
- who created the finding aid (intellectual content)
- what sorts of data migration or reformatting took place

LC Practice requires that if this element is used, it should be bundled within `<descgrp type="admininfo">`.

See Also:

Section 3.3.3.8, Alternate Form of the Materials Available [Go To Section](#)

Section 3.3.8.6, Separated Materials [Go To Section](#)

Labels/heads:

Choose or formulate required `<head>` appropriate to content, e.g.

- Processing History
- Location of Materials
- Reformatted Materials

Encoding Analog: 583**Tagging Example 1:**

Initial processing, additions, and published LC description

```
<processinfo encodinganalog="583">
  <head>Processing History</head>
  <p>The papers of Caleb Cushing were initially arranged and described
  between 1961 and 1962. Additional material was incorporated into the
  collection in 1984 and in 1999. A description of the Caleb Cushing
  Papers appeared in the <title>Report of the Librarian of Congress,
  1936,</title> p. 33.</p>
</processinfo>
```

Display Of Tagging Example 1:

Initial processing, additions, and published LC description

```
Processing History:

The papers of Caleb Cushing were initially arranged and described
between 1961 and 1962. Additional material was incorporated into the
collection in 1984 and in 1999. A description of the Caleb Cushing
Papers appeared in the Report of the Librarian of Congress, 1936,
p. 33.
```

Tagging Example 2:

Notes processing of collection and revision of finding aid; names processors

```
<processinfo encodinganalog="583">
  <head>Processing History</head>
  <p>Robin Fanslow accessioned, arranged, and processed this
  collection. She curated the online presentation and prepared the
  pre-EAD collection guide for all original and additional materials
  in June 1999. Nora Yeh revised this finding aid during the process
  of encoding.</p>
</processinfo>
```

Display Of Tagging Example 2:

Notes processing of collection and revision of finding aid; names processors

```
Processing History:

Robin Fanslow accessioned, arranged, and processed this
collection. She curated the online presentation and prepared the
pre-EAD collection guide for all original and additional materials in
June 1999. Nora Yeh revised this finding aid during the process of
```

encoding.

Tagging Example 3:

Identifies conversion of sound recordings unavailable for public use

```
<processinfo encodinganalog="583">
<head>Reformatted Materials</head>
<p>Reference copies of audio materials on 10-inch reel-to-reel tape
have been made for service in the AFC reading room. The original 36
12-inch acetate-on-aluminum discs (AFS 3905-3940) and the 5 10-inch
preservation reel-to-reel tape copies (LWO 4872: reels 255-259) are
stored in the Motion Picture, Broadcasting and Recorded Sound
Division, Library of Congress.</p>
</processinfo>
```

Display Of Tagging Example 3:

Identifies conversion of sound recordings unavailable for public use

Reformatted Materials

Reference copies of audio materials on 10-inch reel-to-reel tape have been made for service in the AFC reading room. The original 36 12-inch acetate-on-aluminum discs (AFS 3905-3940) and the 5 10-inch preservation reel-to-reel tape copies (LWO 4872: reels 255-259) are stored in the Motion Picture, Broadcasting and Recorded Sound Division, Library of Congress.

Tagging Example 4:

Notes reformatting of electronic data via WordPerfect to paper form

```
<processinfo encodinganalog="583">
<head>Reformatted Materials</head>
<p>Speeches and other documents created using MORE 3.0, an
outlining/text editing program for Apple computers that is no
longer commercially available or supported, have been converted to
WordPerfect 8.0 files and printed during the processing of the
collection. No attempt was made to recover original formatting or
typographic elements. The print copies note the file date of the
version received as part of the collection, as well as the date
they were printed by the repository.</p>
</processinfo>
```

Display Of Tagging Example 4:

Notes reformatting of electronic data via WordPerfect to paper form

Reformatted Materials

Speeches and other documents created using MORE 3.0, an outlining/text editing program for Apple computers that is no longer commercially available or supported, have been converted to WordPerfect 8.0 files and printed during the processing of the collection. No attempt was made to recover original formatting or typographic elements. The

print copies note the file date of the version received as part of the collection, as well as the date they were printed by the repository.

Comments:

- The data recorded in this element will vary according to divisional policies. For instance, Manuscript Division uses [<processinfo>](#) to record dates and types of major processing activities (e.g., additions to the collection) only after initial processing and guide creation has taken place. It also records information about LC publications that further describe the collection. See Example 1.
- Processing information may include names of processors and dates of processing as well as any notable or unusual processing activities. The [<processinfo>](#) element may be used to describe original processing or further processing later in time. Routine processing need not be recorded and use of this element is not always required if it repeats information already available in header and title page display. Follow local practice in what's recorded here. See Example 2.
- In the past, [<processinfo>](#) was used to describe the transfer of material to other Library divisions. Current LC practice is to encode such information as [<separatedmaterial>](#); a brief listing may still be included in the administrative [<descgrp>](#) (see Section 3.3.3, Administrative Information, Example 1) while a detailed listing of transferred material might be listed elsewhere with other adjunct information (see Section 3.3.8.6, Separated Material, Example 2).
- Processing information for electronic records may include information about reformatting or migration of data which does not result in alternate forms available for public use, such as when the original is not usable or data has been migrated to a usable form. See Example 3 and Example 4. If original material is still available for public use, these newly formatted versions would be listed in [<altformavail>](#) instead.)

Repeatable: yes**Order:** following [<accruals>](#) and preceding [<appraisal>](#)**Revision Date:** 05/02/08

3.3.3.5 Appraisal

Tag:[<appraisal>](#)**Description:**

Information about criteria for determining the archival value of documentary material for acquisition or retention by an archival repository. ("Appraisal" in this sense does **not** pertain to determining monetary value of collection material.) This element can be used to document both original appraisal decisions and reappraisals that resulted in significant weeding or deaccessioning.

LC Practice requires that if this element is used, it should be bundled within [<descgrp type="admininfo">](#).

Labels/heads:

Recommended content of required [<head>](#):

- Appraisal
- Retention Criteria

Encoding Analog: 583\$a

Tagging Example 1:

Disposition of material not retained as result of appraisal decision

```
<appraisal encodinganalog="583$a">
<head>Appraisal</head>
<p>Duplicates and extraneous material have been returned to the
donor in accordance with the instrument of gift.</p>
</appraisal>
```

Display Of Tagging Example 1:

```
Appraisal:

Duplicates and extraneous material have been returned to the donor in
accordance with the instrument of gift.
```

Comments:

Used primarily for archival records; unlikely to be used at LC.

Repeatable: yes**Order:** following <processinfo> and before <userrestrict>**Revision Date:** 03/05/03**3.3.3.6 Conditions Governing Use****Tag:**

<userrestrict>

Description:

Information about conditions that affect use of the described materials after access has been granted, such as limitations, regulations, or special procedures regarding reproduction, publication, or quotation of the materials. This element may also indicate the absence of restrictions, such as when copyright or literary rights have been dedicated to the public.

LC practice requires the inclusion of information about the presence of restrictions on use within <descgrp type="admininfo">. If there are no restrictions on use, it is recommended that this be noted.

See Also:Section 3.3.3.7, Conditions Governing Access [Go To Section](#)**Labels/heads:**

Choose or formulate required <head> appropriate to content, e.g.

- Restrictions
- Copyright Status

Encoding Analog: 540

Tagging Example 1:

Generic statement of restrictions on use

```
<userrestrict encodinganalog="540">
<head>Restrictions</head>
<p>Restrictions apply concerning the use, photoduplication, or
publication of items in this collection. Consult a reference
librarian in the Manuscript Division for information concerning
these restrictions.</p>
</userrestrict>
```

Display Of Tagging Example 1:

Generic statement of restrictions on use

```
Restrictions: Restrictions apply concerning the use, photoduplication,
or publication of items in this collection. Consult a reference
librarian in the Manuscript Division for information concerning these
restrictions.
```

Tagging Example 2:

Copyright notice (status of copyright is unknown)

```
<userrestrict encodinganalog="540">
<head>Copyright Status</head>
<p>The status of copyright in the unpublished writings of John Doe
is governed by the Copyright Law of the United States (Title 17,
U.S.C.).</p>
</userrestrict>
```

Display Of Tagging Example 2:

Copyright notice (status of copyright is unknown)

```
Copyright Status

The status of copyright in the unpublished writings of John Doe is
governed by the Copyright Law of the United States (Title 17, U.S.C.).
```

Tagging Example 3:

Copyright retained by creator

```
<userrestrict encodinganalog="540">
<head>Restrictions</head>
<p>The National Broadcasting Company retains the rights governing
subsequent use of materials in the collection. For permission to quote
or republish materials from the collection contact the National
Broadcasting Company.</p>
</userrestrict>
```

Display Of Tagging Example 3:

Copyright retained by creator

Restrictions:
The National Broadcasting Company retains the rights governing subsequent use of materials in the collection. For permission to quote or republish materials from the collection contact the National Broadcasting Company.

Comments:

Do not confuse with `<accessrestrict>`, which deals with conditions governing access to collection materials rather than the use that may be made of them once access is obtained.

Repeatable: yes

Order: following `<appraisal>` and preceding `<accessrestrict>`

Revision Date: 3/5/03

3.3.3.7 Conditions Governing Access**Tag:**

`<accessrestrict>`

Description:

Information about conditions that affect the availability of the materials described in the finding aid. Such restrictions may include those imposed by donors or by government security classification. This element can also be used to state the absence of any access restrictions.

LC practice requires the inclusion of information about the presence of restrictions on access within `<descgrp type="admininfo">`. If there are no restrictions on access, it is recommended that this be noted.

See Also:

Section 3.3.3.6, Conditions Governing Use [Go To Section](#)

Labels/heads:

Choose or formulate required `<head>` appropriate to content, e.g.

- Access
- Security Classified Documents

Encoding Analog: 506

Tagging Example 1:

Security restrictions on access

```
<accessrestrict encodinganalog="506">
<head>Security Classified Documents</head>
<p>Government regulations control the use of security classified
material in this collection. Manuscript Division staff can furnish
information concerning access to and use of classified items.</p>
</accessrestrict>
```

Display Of Tagging Example 1:

Security restrictions on access

```
Security Classified Documents: Government regulations control the use
of security classified material in this collection. Manuscript
Division staff can furnish information concerning access to and use of
classified items.
```

Tagging Example 2:

Access is unrestricted

```
<accessrestrict encodinganalog="506">
<head>Access</head>
<p>Listening and viewing access to the collection is
unrestricted. Listening copies of the recordings are available at
the Folklife Reading Room as well as online.</p>
</accessrestrict>
```

Display Of Tagging Example 2:

Access is unrestricted

```
Access: Listening and viewing access to the collection is
unrestricted. Listening copies of the recordings are available at the
Folklife Reading Room as well as online.
```

Comments:

This element should not be confused with [<userrestrict>](#), which deals with conditions governing the use a researcher may make of the papers once access has been obtained.

Repeatable: yes

Order: following [<userrestrict>](#) and preceding [<altformavail>](#)

Revision Date: 03/05/03

3.3.3.8 Alternate Form of the Materials Available**Tag:**

[<altformavail>](#)

Description:

Availability of all or part of the collection material in multiple formats for patrons to use, such as microform, digital, paper facsimile, or reformatted audio or video materials. Information about the material might include the format of the alternate form, its extent, identifying codes, and the source/procedure for ordering copies. This is not the place to record all forms of content contained within the collection.

If copies exist in more than one format, [<altformavail>](#) may be repeated with a head appropriate to its content.

LC practice requires the inclusion of information about alternate forms of material if such exist within [<descgrp type="admininfo">](#).

See Also:

Section 3.3.7.4, Expanded Description of Components (discussion of <daogr>) [Go To Section](#)

Labels/heads:

Choose or formulate required <head> appropriate to content, e.g.

- Microform
- Microfilm
- Electronic Format

Encoding Analog: 530**Tagging Example 1:**

Extent and terms of availability of microfilm edition of entire collection

```
<altformavail encodinganalog="530">
<head>Microfilm:</head>
<p>A microfilm edition of these papers on eighteen reels is
available from the Library's Photoduplication Service for purchase
subject to the Copyright Law of the United States (Title 17,
U.S.C.). This microfilm edition may also be requested on
interlibrary loan through the Library's Loan Division. No more than
ten reels may be requested for each loan period of one month. A
copy of the register of the John Doe Papers is available on reel one
of the microfilm edition.</p>
</altformavail>
```

Display Of Tagging Example 1:

Extent and terms of availability of microfilm edition of entire collection

```
Microfilm:
A microfilm edition of these papers on eighteen reels is available
from the Library's Photoduplication Service for purchase subject to
the Copyright Law of the United States (Title 17, U.S.C.). This
microfilm edition may also be requested on interlibrary loan through
the Library's Loan Division. No more than ten reels may be requested
for each loan period of one month. A copy of the register of the
John Doe Papers is available on reel one of the
microfilm edition.
```

Tagging Example 2:

Availability of part of collection in digitized form

```
<altformavail encodinganalog="530">
<head>Electronic Format:</head>
<p>Selected items from the papers of the Alexander Graham Bell
family are available on the Library of Congress Web site at <extref href="&bellhome;" show="new"
actuate="onrequest">
http://memory.loc.gov/ammem/bellhtml/</extref>. Of
the 4,700 items selected for digitization, 4,650 items are currently
available in digital format via links provided in the container list
of this register.</p>
```

```
</altformavail>
```

Display Of Tagging Example 2:

Availability of part of collection in digitized form

```
Electronic Format: Selected items from the papers of the Alexander
Graham Bell family are available on the Library of Congress Web site
at http://memory.loc.gov/ammem/bellhtml/. Of the 4,700 items selected
for digitization, 4,650 items are currently available in digital
format via links provided in the container list of this register.
```

location of digitized version given as hot link using `<extref>` tag

Tagging Example 3:

Link to Web includes information about availability of reproductions

```
<altformavail encodinganalog="530">
<head>Electronic Format</head> <p>See "Hispano Music and Culture of
the Northern Rio Grande: The Juan B. Rael Collection" at <extref href="&raelhome;" show="new"
actuate="onrequest">
http://memory.loc.gov/ammem/rhtml/rghome.html</extref> which
includes information about ordering audio and photographic
reproductions.</p>
</altformavail>
```

Display Of Tagging Example 3:

Link to Web includes information about availability of reproductions

```
Electronic Format

See "Hispano Music and Culture of the Northern Rio Grande: The Juan
B. Rael Collection" at http://memory.loc.gov/ammem/rhtml/rghome.html/
which includes information about ordering audio and photographic
reproductions.
```

location of digitized version given as hot link using `<extref>` tag

Comments:

- If a collection is available in multiple formats (for instance, microform and electronic), separate paragraphs with appropriate headings should be used. See Examples 1 and 2.
- Information about how to order copies, restriction and reproduction of alternate forms, how to view etc., may be included as part of `<altformavail>`. If such statements are lengthy or are common to many of a division's finding aids, it may be better to make a link to an external entity such as a web site where such information is available. See Example 3.
- Two scenarios may apply in the use of `<altformavail>` for electronic content:
 - 1. Electronic forms of collection material are available in a separate presentation (e.g., Rael collection in American Memory). The finding aid does not contain specific links to collection material at a folder level.
 - Action required:
 - Include `<altformavail>` note which links to overall presentation

- No further links are required
- 2. Electronic forms of collection materials are available in a separate presentation (e.g., Bernstein collection in American Memory). The finding aid includes specific links to digitized collection material at a folder level.
- Action required:
 - Include `<altformavail>` note which links to overall presentation
 - Include `<dao>` links from folder listings (or from another level of hierarchy, such as series or subseries) in container list
 - Optional: include image concordance `<daogrp>` providing `<daoloc>` links to all digital images linked to in the finding aid. This is done directly under `<archdesc>`, rather than as part of `<archdesc><did>` as would be done for an illustrative "image sampler."

Repeatable: yes

Order: following `<accessrestrict>` and preceding `<prefercite>`

Revision Date: 03/05/03

3.3.3.9 Preferred Citation of the Material

Tag:

`<prefercite>`

Description:

Standard statement supplied by the repository to be used in citing its holdings. This may be a generic citation (which may be provided as an entity file) or a citation specific to the collection. If there are varying preferred citation formats for different original media or modes of publication, examples of all the citations relevant to the collection should be provided.

LC practice recommends the inclusion of information about the form of preferred citation within `<descgrp type="admininfo">`.

Labels/heads:

Recommended content of required `<head>`:

- Preferred Citation

Encoding Analog: 524

Tagging Example 1:

Manuscript Division citation form

```
<prefercite encodinganalog="524">
<head>Preferred Citation</head>
<p>Researchers wishing to cite this collection should include the
following information: container number, Susan B. Anthony Papers,
Manuscript Division, Library of Congress, Washington, D.C.</p>
</prefercite>
```

Display Of Tagging Example 1:

Manuscript Division citation form

```
Preferred Citation: Researchers wishing to cite this collection should
include the following information: container number, Susan B. Anthony
Papers, Manuscript Division, Library of Congress, Washington, D.C.
```

Tagging Example 2:

American Folklife Center citation form

```
<prefercite encodinganalog="524">
<head>Preferred Citation</head>
<p>Researchers wishing to cite this collection should include the
following information: The Juan B. Rael Collection, Archive of
Folk Culture, American Folklife Center, Library of Congress.</p>
</prefercite>
```

Display Of Tagging Example 2:

American Folklife Center citation form

```
Preferred Citation

      Researchers wishing to cite this collection should include
the following information: The Juan B. Rael Collection, Archive of
Folk Culture, American Folklife Center, Library of Congress.
```

Comments:

- Do not use this element for bibliographic citations of published material (MARC encoding analog 510); these should be tagged using [<bibref>](#).
- It is recommended that each custodial division in LC provide a preferred citation for its materials. This is particularly useful to ensure that researchers find cited material in the correct custodial division, and to distinguish similarly named collections (such as the multiple Walt Whitman collections).

Order:

following [<altformavail>](#); final element within [<descgrp type="admininfo">](#)

Revision Date: 03/05/03

3.3.4 Biographical Sketches and Agency Histories**Tag:**

```
<bioghist>
```

Description:

Contextual information about the creation or formation of a body of archival materials in the form of a creator sketch which provides background information about the individual, family, or organization which created or collected the materials. The information may be presented as a narrative text and/or as a chronology.

LC practice recommends inclusion of biographical data about the originator/s (creator/collector) in the [<bioghist>](#) element.

Labels/heads:

Choose or formulate required [<head>](#) appropriate to content, e.g.,

- Biographical Note
- Organizational History
- Genealogy Chart

Encoding Analog: 545**Subelements:**

[<chronlist>](#)

[<listhead>](#)

[<head01>](#)

[<head02>](#)

[<eventgrp>](#)

[<date>](#)

[<event>](#)

Generic text formatting elements such as [<p>](#), [<list>](#), and [<table>](#) can also be used under [<bioghist>](#). See Tag Library for full list of valid subelements.

Tagging Example 1:

Narrative text for Rael Collection

```
<bioghist encodinganalog="545">
<head>The Collector</head>
<p>Linguist and folklorist Juan Bautista Rael, highly regarded for
his pioneering work in collecting and documenting the Hispano folk
stories, plays, and religious traditions of northern New Mexico and
southern Colorado, was born on August 14, 1900, in Arroyo Hondo, New
Mexico. His bachelor's degree, from St. Mary's College in Oakland in
1923, led to a master's degree from the University of California at
Berkeley in 1927. After deciding on a university career of teaching
and research, Rael relinquished his family inheritance in land,
cattle, and sheep to his three brothers and his sister. He had
realized that the wealth in northern New Mexico that most interested
him was the vast repertory of folk narrative, song, and custom that
had scarcely been documented.</p>
<p>While teaching at the University of Oregon, Rael returned to
Arroyo Hondo in the summer of 1930 to begin compiling his famous
collection of over five hundred New Mexican folk tales ...</p>
</bioghist>
```

Display Of Tagging Example 1:

Narrative text

The Collector

Linguist and folklorist Juan Bautista Rael, highly regarded for his pioneering work in collecting and documenting the Hispano folk

stories, plays, and religious traditions of northern New Mexico and southern Colorado, was born on August 14, 1900, in Arroyo Hondo, New Mexico. His bachelor's degree, from St. Mary's College in Oakland in 1923, led to a master's degree from the University of California at Berkeley in 1927. After deciding on a university career of teaching and research, Rael relinquished his family inheritance in land, cattle, and sheep to his three brothers and his sister. He had realized that the wealth in northern New Mexico that most interested him was the vast repertory of folk narrative, song, and custom that had scarcely been documented.

While teaching at the University of Oregon, Rael returned to Arroyo Hondo in the summer of 1930 to begin compiling his famous collection of over five hundred New Mexican folk tales ...

Tagging Example 2:

Chronological list for Shaker Collection (single <bioghist>)

```
<bioghist encodinganalog="545">
<head>Organizational History</head>
<chronlist>
  <listhead>
    <head01>Date</head01>
    <head02>Event</head02>
  </listhead>
  <chronitem>
    <date>1774</date>
    <event>Ann Lee (born 1736, Manchester, England), leader of the
    Shakers, sailed from Liverpool, England, to New York with eight
    companions, eventually settling at Niskeyuna (later called
    Watervliet), N.Y.</event>
  </chronitem>
  <chronitem>
    <date>1781</date>
    <event>Shaker community (City of Union) founded at Enfield, Conn. </event>
  </chronitem>
  <chronitem>
    <date>1781-1783</date>
    <event>Ann Lee and other Shakers traveled in Massachusetts and
    Connecticut spreading Shaker doctrine</event>
  </chronitem>
  <chronitem>
    <date>1784</date>
    <eventgrp>
      <event>Death of Ann Lee </event>
      <event>James Whittaker assumed leadership (died 1787)</event>
    </eventgrp>
  </chronitem>
</chronlist>
</bioghist>
```

Display Of Tagging Example 2:

Organizational History

1774

Ann Lee (born 1736, Manchester, England), leader of the Shakers, sailed from Liverpool, England, to New York with eight companions, eventually settling at Niskeyuna (later called Watervliet), N.Y.

1781

Shaker community (City of Union) founded at Enfield, Conn.

1781-1783

Ann Lee and other Shakers traveled in Massachusetts and Connecticut spreading Shaker doctrine

1784

Death of Ann Lee

James Whittaker assumed leadership (died 1787)

Non-tabular display with list headings suppressed

Tagging Example 3:

Chronological list for Papers of Wilbur and Orville Wright (multiple bioghist elements)

```
<bioghist encodinganalog="545">
<head>Biographical Notes</head>
<bioghist>
<head>Wilbur Wright</head>
<chronlist>
<listhead>
<head01>Date</head01>
<head02>Event</head02>
</listhead>
<chronitem>
<date>1867, Apr. 16</date>
<event>Born, Millville, Ind.</event>
</chronitem>
<chronitem>
<date>1889</date>
<event>Began publication of the West Side News (weekly
newspaper), Dayton, Ohio.</event>
</chronitem>
</chronlist>
</bioghist>

<bioghist>
<head>Orville Wright</head>
<chronlist>
<listhead>
<head01>Date</head01>
<head02>Event</head02>
</listhead>
<chronitem>
<date>1871, Aug. 19</date>
<event>Born, Dayton, Ohio</event>
</chronitem>
<chronitem>
<date>1896-1903</date>
<event>Made aerial experiments with kites and gliders</event>
</chronitem>
</chronlist>
</bioghist>
```

```
</bioghist>
```

Display Of Tagging Example 3:

Chronological list (multiple bioghist elements)

| Biographical Notes | |
|--------------------|--|
| Wilbur Wright | |
| Date | Event |
| 1867, Apr. 16 | Born, Millville, Ind. |
| 1889 | Began publication of the West Side News (weekly newspaper), Dayton, Ohio |
| Orville Wright | |
| Date | Event |
| 1871, Aug. 19 | Born, Dayton, Ohio |
| 1896-1903 | Made aerial experiments with kites and gliders |

Tagging Example 4:

Genealogical chart with nested lists

```
<bioghist encodinganalog="545">
  <head>Genealogy Chart, Piccard Family</head>
  <list type="simple">
    <item>Jules Piccard, m. Helene (Haltenhoff)
      <list type="simple">
        <item>Auguste, m. Marianne (Denis)
          <list type="simple">
            <item>Denise</item>
            <item>Jacques, m. Marie-Claude</item>
            <item>Marianne</item>
            <item>Helene</item>
            <item>Genevieve</item>
          </list>
        </item>
      </list>
    </item>
  </list>
</bioghist>
```

Display Of Tagging Example 4:

Genealogical chart with nested lists

| |
|---------------------------------------|
| Genealogy Chart, Piccard Family |
| Jules Piccard, m. Helene (Haltenhoff) |

```

Auguste, m. Marianne (Denis)
  Denise
  Jacques, m. Marie-Claude
  Marianne
  Helene
  Genevieve

```

Comments:

- Biographical information in `<bioghist>` may be expressed as a narrative text (Example 1), as a chronological list (Examples 2-3), or as a simple list (Example 4).
- When `<chronlist>` tagging is used, be sure to include list head tagging that are required for proper accessibility in a Web display. See `<listhead>` in Example 2.
- When multiple biographical notes/agency histories are appropriate to the content of a single finding aid (for example, the papers of Wilbur and Orville Wright, or the Herndon-Weik Collection of Lincolniana), `<bioghist>` elements may be created for each individual or organization which needs contextual information (e.g., Charles Eames, Ray Eames; or, William Henry Herndon, Jesse William Weik, Abraham Lincoln). It does not matter whether these are in narrative form, chronology form, or both. It is suggested that each `<bioghist>` be bundled under one overall `<bioghist>`. Within each `<bioghist>`, use a `<head>` which indicates the person or organization being described. See Example 3.
- If biographical information is neither narrative nor a chronological list, e.g., a genealogical chart, use appropriate text formatting such as `<list>` or `<table>`. See Example 4.
- LC practice recommends the inclusion of `<bioghist>`, as this element is required by ISAD-G. If little is known about an individual or organization, provide a brief description in the format desired (e.g., narrative or chronlist). Conversely, if the individual or organization is very well known and a full `<bioghist>` is not desired in the finding aid, provide at least the information available in the 545 field (Biographical/Historical Note) and cite a standard reference source if desired.

Repeatable: yes (and recursive)

Order: following `<descgrp type="admininfo">` and preceding `<scopecontent>`

Revision Date: 09/30/03

3.3.5 Scope and Content Note

Tag:

`<scopecontent>`

Description:

Summary overview of the range and topical coverage of the collection, often mentioning their form and organization, and naming significant individuals, organizations, events, places, and subjects represented in the materials.

LC Practice requires inclusion of a scope and content note. While a description of the organization or arrangement of the collection as a whole forms a natural part of the Scope and Content Note, LC practice recommends formally encoding this information separately in an `<arrangement>` section in view of emerging community practice.

Labels/heads:

Recommended content of required `<head>`:

- Scope and Content Note

Encoding Analog: 520

Subelements:`<head>``<p>` (repeatable)**Tagging Example 1:**

Scope and Content Note with head and paragraphs

```

<scopecontent encodinganalog="520">
  <head>Scope and Content Note</head>
  <p>The Blackwell Family Papers span the years 1759-1960, with the
  bulk of the material dating from 1845 to 1890. The collection
  features the papers of Lucy Stone; her husband, Henry Browne
  Blackwell; and their daughter, Alice Stone Blackwell, all of whom
  were prominent in the woman's rights movement. Also included are
  papers of Elizabeth Blackwell, Henry Browne Blackwell's sister who
  as a doctor pioneered in the role of women in medicine. The
  collection is organized in seven series: Alice Stone Blackwell
  Papers, Elizabeth Blackwell Papers, Henry Browne Blackwell Papers,
  Kitty Barry Blackwell Papers, Lucy Stone Papers, Other Blackwell
  Family Papers, and Addition.</p>
  <p>The Alice Stone Blackwell Papers contain ...</p>
</scopecontent>

```

Display Of Tagging Example 1:

Scope and Content Note with head and paragraphs

Scope and Content Note

The Blackwell Family Papers span the years 1759-1960, with the bulk of the material dating from 1845 to 1890. The collection features the papers of Lucy Stone; her husband, Henry Browne Blackwell; and their daughter, Alice Stone Blackwell, all of whom were prominent in the woman's rights movement. Also included are papers of Elizabeth Blackwell, Henry Browne Blackwell's sister who as a doctor pioneered in the role of women in medicine. The collection is organized in seven series: Alice Stone Blackwell Papers, Elizabeth Blackwell Papers, Henry Browne Blackwell Papers, Kitty Barry Blackwell Papers, Lucy Stone Papers, Other Blackwell Family Papers, and Addition.

The Alice Stone Blackwell Papers contain ...

Comments:

Summary overview information is also presented in a series-by-series description in the Description of Subordinate Components. Judgement should be used in determining the fullness of description in the overall Scope and Content Note with that given in the `<scopecontent>` for each series in the `<dsc>`.

The `<scopecontent>` is recursive; separate `<scopecontent>` elements may be nested within a single `<scopecontent>`, for example,

- for a multi-divisional finding aid with different discussions for holdings of each division
- for a collection organized and described in parts

- to enable the extraction of the first paragraph for use as content in a MARC record (see Application Guidelines for example).

While a description of the organization or arrangement of the collection as a whole forms a natural part of the Scope and Content Note, LC practice recommends formally encoding this information separately in an [<arrangement>](#) section. See Section 3.3.6 for further guidance.

Repeatable: yes (and recursive)

Order: following [<bioghist>](#) and preceding [<dsc>](#)

Revision Date: 03/05/03

3.3.6 Arrangement

Tag:

[<arrangement>](#)

Description:

The Arrangement element records statements about the organization or arrangement of the collection as a whole.

LC practice recommends encoding this information separately in an [<arrangement>](#) section in view of emerging community practice. This element may also be used at the component level to explain the organization or arrangement of papers within that component.

See Also:

Section 3.3.5, Scope and Content Note [Go To Section](#)

Section 3.3.7.4, Expanded Description of Components [Go To Section](#)

Labels/heads:

Choose or formulate required [<head>](#), e.g.:

- Organization of the Papers (organization)
- List of Series (organization)
- Arrangement of the Papers (arrangement)

Encoding Analog:

Encoding analog 351\$a (organization); encoding analog 351\$b (arrangement); 351 if intermingled

Subelements:

[<head>](#)

[<p>](#)

[<list>](#)

[<item>](#)

Tagging Example 1:

Organization statement

```
<arrangement encodinganalog="351$a">
  <head>Organization of the Papers</head>
  <p>The Blackwell Family Papers are organized in seven series:</p>
```

```

<list>
  <item>
    <ref target="clalice" show="replace" actuate="onrequest">Alice Stone Blackwell Papers, 1848-1951</ref>
  </item>
  <item>
    <ref target="cleliz" show="replace" actuate="onrequest">Elizabeth Blackwell Papers, 1836-1946</ref>
  </item>
  <item>
    <ref target="clhenry" show="replace" actuate="onrequest">Henry Browne Blackwell Papers, 1834-1909</ref>
  </item>
  <item>
    <ref target="clkitty" show="replace" actuate="onrequest">Kitty Barry Blackwell Papers, 1855-1938</ref>
  </item>
  <item>
    <ref target="cllucy" show="replace" actuate="onrequest">Lucy Stone Papers, 1759-1960</ref>
  </item>
  <item>
    <ref target="clother" show="replace" actuate="onrequest">Other Blackwell Family Papers, 1834-1958</ref>
  </item>
  <item>
    <ref target="cladd" show="replace" actuate="onrequest">Addition, 1854-1958</ref>
  </item>
</list>
</arrangement>

```

Display Of Tagging Example 1:

Organization statement

Organization of the Papers

The Blackwell Family Papers are organized in seven series:

Alice Stone Blackwell Papers, 1848-1957
 Elizabeth Blackwell Papers, 1836-1946
 Henry Browne Blackwell Papers, 1834-1909
 Kitty Barry Blackwell Papers, 1855-1938
 Lucy Stone Papers, 1759-1960
 Other Blackwell Family Papers, 1834-1958
 Addition, 1854-1958

Tagging Example 2:

Arrangement statement

```

<arrangement encodinganalog="351$b">
  <head>Arrangement of the Papers</head>
  <p>The Charles Wellington Reed Papers are arranged alphabetically
  by type of material with oversize items located at the end of the
  collection.</p>
</arrangement>

```

Display Of Tagging Example 2:

Arrangement statement

Arrangement of the Papers

The Charles Wellington Reed Papers are arranged alphabetically by type of material with oversize items located at the end of the collection.

Comments:

- Encode as `<arrangement encodinganalog="351$a">` the manner in which the collection has been ordered (e.g., organized into series; see Example 1), and as `<arrangement encodinganalog="351$b">` the filing sequence of the material (e.g., alphabetical or chronological; see Example 2). Encode as `<arrangement encodinganalog="351">` if statements about organization and arrangement are intermingled.
- Arrangement statements may also be encoded as such within `<scopecontent>`, although this option is not followed at LC.
- Information on the organization or arrangement of each subordinate component such as series or subseries should be encoded at the component level.
- Consider creating links from a list of series to the series title in the container list. This may be done with `<ref>` tags, as illustrated in Example 1, or with a stylesheet, as described in the EAD Cookbook.

Repeatable: yes (and recursive)

Order: Following `<scopecontent>` and preceding `<dsc>`

Revision Date: 05/02/08

3.3.7 Description of Subordinate Components

Tag:

`<dsc>`

Description:

The Description of Subordinate Components is a required wrapper for the description of individual components. The required attribute TYPE selected defines whether the `<dsc>` is simply a container listing (type="in-depth"), a brief summary at the series level (type="analyticover"), combines these two "views" into one (type="combined"), or is of some other type (type="othertype"). These views are frequently displayed in the form of a table listing container numbers and contents.

LC Practice is to use only one `<dsc>`, most commonly with TYPE attribute set to "in-depth". (Use type="in-depth" for small collections not arranged into series, type="analyticover" for collections for which only series descriptions are available, or type="other" for rare cases in which some other method of description is provided).

Labels/heads:

Choose or formulate required `<head>`, e.g.,

- Container List (for type="in-depth" or "combined")
- Description of Series (for type="analyticover")
- Supply `<head>` for type="othertype" based on content

Other Attributes:

Set required attribute TYPE:

- type="combined"
- type="analyticover"

- type="in-depth"
- type="othertype"

Subelements:

<thead>

<row>

<entry>

Tagging Example 1:

Combined <dsc>: Container List includes description of series

```
<dsc type="combined">
<head>Container List</head>
<c01 level="series">
<did>
<container type="box">1-16</container>
<container type="reel">1-8</container>
<unittitle encodinganalog="245$a" id="cor">Correspondence,
<unitdate encodinganalog="245$f" type="inclusive" normal="1800/1874">1800-1874</unitdate></unittitle>
</did>
<scopecontent encodinganalog="520">
<p>Letters to Webster and letters by and about him. </p>
</scopecontent>
<arrangement encodinganalog="351$b">
<p>Arranged in groups as general correspondence, invitations,
and selected transcripts and chronologically therein.</p>
</arrangement>
<c02 level="file">
<did>
<container type="box">1</container>
<container type="reel">1</container>
<unittitle encodinganalog="245$a">General</unittitle></did>
<c03 level="file">
<did>
<unittitle encodinganalog="245$a"><unitdate encodinganalog="245$f" type="inclusive"
normal="1804-03-18/1825-06-13">1804, Mar. 18 -1825,
June 13</unitdate></unittitle>
</did>
</c03>
<c03 level="file">
<did>
<container type="box">2</container>
<container type="reel">1</container>
<unittitle encodinganalog="245$a"><unitdate encodinganalog="245$f" type="inclusive"
normal="1825-07-17/1829-12-28">1825, July 17-1829,
Dec. 28</unitdate></unittitle>
</did>
</c03>
<c03 level="file">
<did>
<container type="box">3</container>
<container type="reel">2</container>
<unittitle encodinganalog="245$a"><unitdate encodinganalog="245$f" type="inclusive"
normal="1830-01-02/1833-03-27">1830, Jan. 2-1833,
Mar. 27</unitdate></unittitle>
</did>
</c03>
```

```

</c02>
</c01>
</dsc>

```

Note: mandatory column headings omitted from example

Display Of Tagging Example 1:

Combined [<dsc>](#): Container List includes description of series

| Container List | | |
|----------------|----------|--|
| Box 1-16 | Reel 1-8 | Correspondence, 1800-1874 |
| | | Letters to Webster and letters by and about him. |
| | | Arranged in groups as general correspondence, invitations, and selected transcripts and chronologically therein. |
| Box 1 | Reel 1 | General |
| | | 1804, Mar. 18-1825, June 13 |
| Box 2 | Reel 1 | 1825, July 17-1829, Dec. 28 |
| Box 3 | Reel 2 | 1830, Jan. 2-1833, Mar. 27 |

Tagging Example 2:

Small collection without series (Container List only)

```

<dsc type="in-depth">
<head>Container List</head>
<c01 level="file">
<did>
<container type="box">1</container>
<unittitle encodinganalog="245$a">Diaries,
<unitdate encodinganalog="245$f" type="inclusive" normal="1843">1843</unitdate>, <unitdate
encodinganalog="245$f" type="inclusive" normal="1849/1896">1849-1896</unitdate>
</unittitle>
<physdesc>
<extent encodinganalog="300">(4 folders)</extent>
</physdesc>
</did>
</c01>
<c01 level="file">
<did>
<container type="box">1-5</container>
<unittitle encodinganalog="245$a">Family correspondence</unittitle>
</did>
<c02 level="file">
<did>
<container type="box">1</container>
<unittitle encodinganalog="245$a"><unitdate encodinganalog="245$f" type="inclusive"
normal="1803-05/1832-04">1803 May-1832
Apr.</unitdate></unittitle>
<physdesc>
<extent encodinganalog="300">(5 folders)</extent>
</physdesc>
</did>

```

```

</c02>
<c02 level="file">
  <did>
    <container type="box">2</container>
    <unittitle encodinganalog="245$a"><unitdate encodinganalog="245$f" type="inclusive"
normal="1832-05/1835-03">1832 May-1835
      Mar.</unitdate></unittitle>
    <physdesc>
      <extent encodinganalog="300">(6 folders)</extent>
    </physdesc>
  </did>
</c02>
</c01>
</dsc>

```

Note: mandatory column headings omitted from example

Display Of Tagging Example 2:

Small collection without series (Container List only)

| Container List | |
|----------------|---|
| Box 1 | Diaries, 1843, 1849-1896 (4 folders) |
| Box 1-5 | Family correspondence |
| Box 1 | 1803 May-1832 Apr. (5 folders) |
| Box 2 | 1832 May-1835 Mar. (6 folders) |

Tagging Example 3:

Series Description only

```

<dsc type="analyticcover">
  <head>Description of Series</head>
  <c01 level="series">
    <did>
      <container type="box">1-16</container>
      <container type="reel">1-8</container>
      <unittitle encodinganalog="245$a" id="cor">Correspondence,
      <unitdate encodinganalog="245$f" type="inclusive" normal="1800/1874">1800-1874</unitdate></unittitle>
    </did>
    <scopecontent encodinganalog="520">
      <p>Letters to Webster and letters by and about him. </p>
    </scopecontent>
    <arrangement encodinganalog="351$b">
      <p>Arranged in groups as general correspondence, invitations,
      and selected transcripts and chronologically therein.</p>
    </arrangement>
  </c01>
</dsc>

```

Note: mandatory column headings omitted from example

Display Of Tagging Example 3:

Series Description only

| Description of Series | | |
|-----------------------|----------|--|
| Box 1-16 | Reel 1-8 | Correspondence, 1800-1874 |
| | | Letters to Webster and letters by and about him. |
| | | Arranged in groups as general correspondence, invitations, and selected transcripts and chronologically therein. |

Tagging Example 4:

Headings for tabular display

```
<dsc type="in-depth">
<head>Container List</head>
<thead>
<row>
<entry>Box</entry>
<entry>Reel</entry>
<entry>Contents</entry>
</row>
</thead>
<c01 level="file">
<did>
<container type="box">1</container>
<container type="reel">1</container>
<unittitle encodinganalog="245$a" id="cor">Correspondence, <unitdate encodinganalog="245$f"
type="inclusive" normal="1898/1975">1800-1874, n.d.</unitdate></unittitle>
</did>
<c02>
<did>
<container type="box">1</container>
<container type="reel">1</container>
<unittitle encodinganalog="245$a">General</unittitle>
</did>
</c02>
</c01>
</dsc>
```

Display Of Tagging Example 4:

Headings for tabular display

| Container List | | |
|----------------|--------|---------------------------|
| Box | Reel | Contents |
| Box 1 | Reel 1 | Correspondence, 1800-1874 |
| Box 1 | Reel 1 | General |

Tagging Example 5:

Collection organized in parts using single `<dsc>`

```
<dsc type="in-depth">
  <head>Container List</head>
  <c01 level="series">
    <did>
      <container type="box">I: A1-A10</container>
      <unittitle encodinganalog="245$a" id="perscorl">Part I: Personal Correspondence, <unitdate
encodinganalog="245$f" type="inclusive" normal="1930/1976">1930-1976</unitdate>
</unittitle>
    </did>
    <scopecontent encodinganalog="520">
      <p>Letters received and copies of letters sent.</p>
    </scopecontent>
    <arrangement encodinganalog="351$b">
      <p>Arranged chronologically by year.</p>
    </arrangement>
  </c01>

  <c01 level="series">
    <did>
      <container type="box">II: 1-4</container>
      <unittitle encodinganalog="245$a" id="corll">Part II: Correspondence, <unitdate encodinganalog="245$f"
type="inclusive" normal="1956/1991">1956-1991</unitdate></unittitle>
    </did>
    <scopecontent encodinganalog="520">
      <p>Family, general, and special correspondence.</p>
    </scopecontent>
    <arrangement encodinganalog="351$b">
      <p>Arranged chronologically.</p>
    </arrangement>
  </c01>
</dsc>
```

Note: mandatory column headings and components below series level omitted from example

Display Of Tagging Example 5:

Collection organized in parts using single `<dsc>`

| Container List | |
|----------------|--|
| I: A1-A10 | Part I: Personal Correspondence, 1930-1976. Letters received and copies of letters sent. Arranged chronologically by year. |
| II: 1-4 | Part II: Correspondence, 1956-1991, n.d. Family, general, and special correspondence. Arranged chronologically. |

Note: components below series level omitted from example

Comments:

- Current encoding practice for collections organized into series is to use the `dsc type="combined"` for the combined description of series and container list. See Example 1. This approach prevents duplication of information in terms

of both encoding and searching, and the need to lead researchers through layers of the finding aid. XSL stylesheets can present data encoded using this combined approach to display either as combined, broken out into Description of Series and Container List, or both.

- When a collection is not organized into series (typically a small collection), the `<dsc>` type will be "in-depth" for a container list. See Example 2.
- It is also conceivable that a finding aid might be encoded for a collection which has not been described to the item level, but stops at the series level. This would have a dsc only at the "analyticover" level. See Example 3.
- Use "othertype" for an alternative view of the components in addition to the usual "combined", or in other situations as appropriate.
- When a tabular display is intended, as in Examples 1-5, use table heading tags (`<thead>` and its subelements,) as shown in Example 4 to provide HTML versions of the finding aid with headings for each column. This is required to meet accessibility requirements for users of text browsers, voice recognition software, etc. The contents of these tags should match what is being described.

Repeatable: yes

Revision Date: 05/06/08

3.3.7.1 What is a Component?

Tag:

`<c>`

Description:

Components are wrapper elements that designate a subordinate part of the archival materials being described. They may be used to designate common units such as series, subseries, file, and item, or any intervening levels of hierarchical arrangement. Components may be represented as nested `<c>` elements or components may be numbered (`<c01>`, `<c02>` etc.).

LC Practice mandates the use of components in the Description of Subordinate Components `<dsc>` and recommends setting the LEVEL attribute for all component levels.

See Also:

Section 3.3.7.2, Unnumbered versus Numbered Components [Go To Section](#)

Other Attributes:

- level="series"
- level="subseries"
- level="file"
- level="item"

See Tag Library for full list of valid attribute values for LEVEL.

Subelements:

`<did>` See 3.3.7.3, Basic Description of Each Component **Required**

former `<admininfo>` subelements See 3.3.7.4, Expanded Description of Components

`<bioghist>` See 3.3.7.4, Expanded Description of Components

`<scopecontent>` See 3.3.7.4, Expanded Description of Components

former <add> subelements See 3.3.7.4, Expanded Description of Components

<originalsloc> See Tag Library

<phystech> See Tag Library

<odd> See 3.3.7.4, Expanded Description of Components

Tagging Example 1:

Collection with series and some subseries

```
<c01 level="series">
  <did>
    <unittitle encodinganalogue="245$a">FAMILY PAPERS, <unitdate encodinganalogue="245$f" type="inclusive"
normal="1872/1892">1872-1892</unitdate></unittitle>
  </did>
  <c02 level="file">
    <did>
      <unittitle encodinganalogue="245$a">Diaries, <unitdate encodinganalogue="245$f" type="inclusive"
normal="1872">1872</unitdate></unittitle>
    </did>
  </c02>
  <c02 level="file">
    <did>
      <unittitle encodinganalogue="245$a">Notebooks, <unitdate encodinganalogue="245$f" type="inclusive"
normal="1875/1892">1875-1892</unitdate></unittitle>
    </did>
  </c02>
</c01>
<c01 level="series">
  <did>
    <unittitle encodinganalogue="245$a">CORRESPONDENCE, <unitdate encodinganalogue="245$f" type="inclusive"
normal="1938/1976">1938-1976</unitdate>, <unitdate>n.d.</unitdate></unittitle>
  </did>
  <c02 level="subseries">
    <did>
      <unittitle encodinganalogue="245$a">General, <unitdate encodinganalogue="245$f" type="inclusive"
normal="1938/1976">1938-1976</unitdate></unittitle>
    </did>
    <c03 level="file">
      <did>
        <unittitle encodinganalogue="245$a">Adams, John, <unitdate encodinganalogue="245$f" type="inclusive"
normal="1944/1945">1944-1945</unitdate></unittitle>
      </did>
    </c03>
  </c02>
  <c02 level="subseries">
    <did>
      <unittitle encodinganalogue="245$a">Organizations, <unitdate encodinganalogue="245$f" type="inclusive"
normal="1943/1976">1943-1976</unitdate>, <unitdate>n.d.</unitdate></unittitle>
    </did>
  </c02>
</c01>
```

Display Of Tagging Example 1:

Collection with series and some subseries

FAMILY PAPERS, 1872-1892

Diaries, 1872
 Notebooks, 1875-1892

CORRESPONDENCE, 1938-1976, n.d.
 General, 1938-1976
 Adams, John, 1944-1945
 Organizations, 1943-1976, n.d.

Tagging Example 2:

Collection with complex subseries arrangement

```
<c01 level="series">
  <did>
    <unittitle encodinganalog="245$a"> SPECIAL FILES: PUBLIC SERVICE,
      <unitdate encodinganalog="245$f" type="inclusive" normal="1918/1986">1918-1986</unitdate>
    </unittitle>
  </did>
  <c02 level="subseries">
    <did>
      <unittitle encodinganalog="245$a">WORLD WAR II FILES,
        <unitdate encodinganalog="245$f" type="inclusive" normal="1941/1981">1941-1981</unitdate>
      </unittitle>
    </did>
    <c03 level="subseries">
      <did>
        <unittitle encodinganalog="245$a">Harriman Mission,
          <unitdate encodinganalog="245$f" type="inclusive" normal="1941/1946">1941-1946</unitdate>
        </unittitle>
      </did>
      <c04 level="file">
        <did>
          <unittitle encodinganalog="245$a">Folder title,
            <unitdate encodinganalog="245$f" type="inclusive" normal="1944">1944</unitdate>
          </unittitle>
        </did>
      </c04>
    </c03>
    <c03 level="subseries">
      <did>
        <unittitle encodinganalog="245$a">Moscow Files,
          <unitdate encodinganalog="245$f" type="inclusive" normal="1943/1949">1943-1949</unitdate>
        </unittitle>
      </did>
      <c04 level="file">
        <did>
          <unittitle encodinganalog="245$a">Folder title,
            <unitdate encodinganalog="245$f" type="inclusive" normal="1943/1946">1943-1946</unitdate>
          </unittitle>
        </did>
      </c04>
    </c03>
  </c02>
  <c02 level="subseries">
    <did>
      <unittitle encodinganalog="245$a">TRUMAN ADMINISTRATION,
        <unitdate encodinganalog="245$f" type="inclusive" normal="1943/1963">1943-1963</unitdate>
      </unittitle>
    </did>
```



```
</c02>
</c01>
```

Display Of Tagging Example 2:

Collection with complex subseries arrangement

```
SPECIAL FILES: PUBLIC SERVICE, 1918-1986
  WORLD WAR II FILES, 1941-1981

  Harriman Mission, 1941-1946
    Folder title, 1944
  Moscow Files, 1943-1949
    Folder title, 1943-1946

  TRUMAN ADMINISTRATION, 1943-1963
```

Tagging Example 3:

Small collection with no series

```
<c01 level="file">
  <did>
    <unittitle encodinganalog="245$a">Journal and diaries, <unitdate encodinganalog="245$f"
type="inclusive" normal="1843">1843</unitdate>, <unitdate encodinganalog="245$f" type="inclusive"
normal="1849/1896">1849-1896</unitdate></unittitle>
  </did>
</c01>
<c01 level="file">
  <did>
    <unittitle encodinganalog="245$a">Correspondence</unittitle>
  </did>
  <c02 level="file">
    <did>
      <unittitle encodinganalog="245$f"><unitdate encodinganalog="245$f" type="inclusive"
normal="1803-05/1832-04">May 1803-Apr. 1832</unitdate></unittitle>
    </did>
  </c02>
</c01>
```

Display Of Tagging Example 3:

Small collection with no series

```
Journal and diaries, 1843, 1849-1896
Correspondence
  May 1803-Apr. 1832
```

Comments:

- Set LEVEL attributes of "series" or "subseries" for components whose titles should be displayed in a navigator, e.g. series and subseries.
- Set LEVEL attributes of "file" or "item" for all other components.
- If a collection is arranged into series, set attribute `<c01 level="series">`. If a collection is arranged into series and subseries (subgroups worthy of separate overall description and placement in a navigator), set attributes `<c01`

level="series"> and <c02 level="subseries">. Set LEVEL attributes of "file" or "item" for other components as appropriate. See Example 1, second series.

- Not all series have subseries; in series that do not, <c02> elements have attribute level="file" (or, in unusual cases, level="item"). See Example 1, first series.
- If a collection is arranged into series, subseries (subgroups worthy of separate overall description and placement in a navigator), and other subgroups worthy of separate overall description, set attributes <c01 level="series"> and <c02 level="subseries">; set each subsequent important subdivision as <c03 level="subseries">, <c04 level="subseries">. Subordinate components would be set for level file or item, as appropriate. This practice would be needed only for very large and complex collections. See Example 2.
- If a collection is not arranged into series (small collections especially), set <c01 level="file"> and subordinate levels at file or item, as appropriate. See Example 3.
- Set encoding analogs for component subelements as they are set at higher elements, e.g., <unittitle> is "245\$a" whether in the Collection Summary or a subseries title. This will benefit future searching and interoperability without detracting from the ability to extract a pseudo-MARC record from the non-<dsc> portions of the finding aid. Consider supplying these post-encoding using search-and-replace, macros, or xsl stylesheets as possible.
- See RLG Best Practice Guidelines for discussion of archival levels with links to definitions of these levels. Note that an alternate practice to that followed at LC is to use the OTHERLEVEL attribute to identify intermediate levels such as sub-subseries and subfiles.

Repeatable: yes (and recursive)

Order: within <dsc>

Revision Date: 05/06/08

3.3.7.2 Unnumbered Versus Numbered Components

Tag:

<c>

Description:

LC practice is to use numbered components. Remember that the numbers carry no intellectual significance and that a particularly numbered component level may correspond to a variety of intellectual levels. Intellectual distinctions are made using the LEVEL attribute (see EAD Application Guidelines 3.5.2.2 for full discussion).

See Also:

Section 3.3.7.1, What is a Component? (for discussion of the LEVEL attribute and examples of the use of numbered components and the LEVEL attribute) [Go To Section](#)

Other Attributes:

- level="series"
- level="subseries"
- level="file"
- level="item"

See Tag Library for full list of valid attribute values for LEVEL.

Comments:

- If a collection is arranged into series, set attributes <c01 level="series">

- The decision to use numbered components at LC is a pragmatic choice between two equally valid alternatives; one early finding aid was encoded using unnumbered components. Numbered and unnumbered components must never be mixed in a single finding aid.
- LEVEL attributes should be set whether or not components are numbered.

Revision Date: 03/18/03

3.3.7.3 Basic Description of Each Component

Tag:

`<did>`

Description:

This wrapper element contains the basic building blocks of description of archival components at any level

LC Practice requires the use of `<did>` as a wrapper for the required and recommended descriptive elements listed below.

Subelements:

- `<unittitle>` **Required** See 3.3.7.3.1, Unit Title
- `<unitdate>` **Required if available** See 3.3.7.3.2, Unit Date
- `<origination>` See comment below
- `<physdesc>` **Recommended if available** See 3.3.7.3.3, Physical Description
- `<materialspec>` See 3.3.7.4, Expanded Description of Components
- `<langmaterial>` See comment below
- `<abstract>` See 3.3.7.3.4, Abstracts
- `<unitid>` **Recommended if available** See 3.3.7.3.5, ID Numbers
- `<physloc>` See 3.3.7.3.6, Physical Location Information
- `<container>` **Recommended** See 3.3.7.3.7, Container Information
- `<note>` See 3.3.7.4, Expanded Description of Components
- `<daogrp>` See 3.3.7.4, Expanded Description of Components

See Tag Library for full list of valid subelements.

Comments:

- Consider using `<origination>` at the series level when the creator/collector differs from that described in the Collection Summary, e.g., when the John Doe, Sr. papers comprise a series of the John Jay Doe Papers.
- Use `<langmaterial>` at the component level only if the material being described is in a language different from that already specified at the `<archdesc>` level.

Repeatable: yes (and recursive)

Order: within `<dsc>`

Revision Date: 09/17/03

3.3.7.3.1 Unit Title

Tag:

<unittitle>

Description:

Title of component materials being described. This may be the title of a series, of a folder, or of any intermediate level of description.

LC Practice requires the inclusion of unittitle information within each component <did>. Dates of component material are encoded as <unitdate> within the <unittitle>.

See Also:

Section 3.3.1.1, Title of the Unit (at <archdesc> level) [Go To Section](#)

Section 3.3.2.7, Use of Controlled Vocabulary Outside of <controlaccess> [Go To Section](#)

Section 3.3.7.3.2, Unit Date [Go To Section](#)

Encoding Analog:

245\$a (include other subfields if they are part of the title transcription).

Other Attributes:

- id (use if the <unittitle> is the target of a link, e.g., from another component or from the Scope and Content note).

Subelements:

<unitdate>

See Tag Library for full list of valid subelements, e.g., <title> for published works named in the <unittitle>.

Tagging Example 1:

<unittitle> for series includes ID attribute since links have been made to the series title

```
<c01 level="series">
  <did>
    <unittitle encodinganalog="245$a" id="cloffice">OFFICE FILE, <unitdate type="inclusive"
normal="1933/1988">1933-1988</unitdate>, <unitdate>n.d.</unitdate></unittitle>
  </did>
  <c02 level="file">
    <did>
      <container type="box">1</container>
      <unittitle encodinganalog="245$a">Abramovitz, Gerald, <unitdate type="inclusive"
normal="1968/1975">1968-1975</unitdate>, <unitdate type="single" normal="1985">1985</unitdate></unittitle>
    </did>
  </c02>
</c01>
```

Display Of Tagging Example 1:

<unittitle> for series includes ID attribute since links have been made to the series title

OFFICE FILE, 1933-1988, n.d.

Box 1 Abramovitz, Gerald, 1968-1975, 1985

Tagging Example 2:

<imprint> and <bibseries> within <unittitle>

```
<c03 level="file">
<did>
<unittitle encodinganalog="245$a">Eastern Asia 1:1,000,000. Canton
<imprint>
<geogname role="Place of Pub" encodinganalog="260$a">Washington, D.C.</geogname>
<publisher encodinganalog="260$b">United States Army</publisher>
</imprint>
<unitdate encodinganalog="260$c" normal="1945" type="inclusive">1945</unitdate>
<bibseries encodinganalog="490">Sheet <num>NF 49</num>, "Canton", 1st Edition-AMS 3
A.M.S. 5301</bibseries>
</unittitle>
</did>
</c03>
```

Display Of Tagging Example 2:

<imprint> and <bibseries> within <unittitle>

```
Eastern Asia 1:1,000,000. Canton
Washington, D.C. : United States Army, 1945.
Sheet NF 49, "Canton", 1st Edition-AMS 3 A.M.S. 5301
```

Comments:

- EAD permits the use of <unitdate> either as a subelement of <unittitle> or used at the same level as <unittitle>. LC follows United States practice based on the cataloging guidance of APPM, which regarded date information as part of the title. European and Canadian practice, following ISAD-G, regards <unitdate> as an independent element. DACS permits either usage. It is important that these practices never be mixed in a single document.
- Finding aids for collections largely comprised of published material may take advantage of the availability within <unittitle> of <title>, <edition>, <bibseries>, and <imprint> to more precisely encode bibliographic-style data. See Example 2.
- See Section 3.3.2.7 for discussion of including <persname>, <corpname>, and other controlled access tags within <unittitle> and elsewhere.

Repeatable: yes

Order: within <c><did>

Revision Date: 05/05/08

3.3.7.3.2 Unit Date**Tag:**

<unitdate>

Description:

Dates of the materials comprising each component; the dates may be given as inclusive, bulk, or both.

LC Practice requires the inclusion of unitdate information at appropriate component levels within the Description of Subordinate Components.

See Also:

Section 3.3.1.2, Date of the Unit [Go To Section](#)

Encoding Analog:

260\$a (for any type dates, according to visual material cataloging practice); 245\$f (type="inclusive"), according to manuscript cataloging practice; or 245\$g (type="bulk") according to manuscript cataloging practice

Other Attributes:

- type= "inclusive" or "bulk" **Recommended**
- normal (normalize according to ISO 8601 in yyyy-mm-dd format) **Recommended**

Tagging Example 1:

<unitdate> encoded at all component levels; TYPE, NORMAL, ENCODINGANALOG attributes set

```
<c01 level="series">
<did>
  <unittitle encodinganalog="245$a" id="cljournals">Journals and
  Notebooks,
  <unitdate encodinganalog="245$f" type="inclusive" normal="1908/1946">circa 1908-1946</unitdate>
</unittitle>
</did>
<c02 level="file">
<did>
  <container type="box">2</container>
  <unittitle encodinganalog="245$a">
  <unitdate encodinganalog="245$f" type="inclusive" normal="1941">1941</unitdate>
  </unittitle>
</did>
<c03 level="file">
<did>
  <unittitle encodinganalog="245$a">
  <unitdate encodinganalog="245$f" type="inclusive" normal="1941-04/1941-05"> Apr.-May</unitdate>
  , trip to England</unittitle>
</did>
</c03>
<c03 level="file">
<did>
  <unittitle encodinganalog="245$a">
  <unitdate encodinganalog="245$f" type="inclusive" normal="1941-07/1941-08"> July-Aug</unitdate>
  , Roosevelt-Churchill Conference, Placentia Bay,
  Newfoundland</unittitle>
</did>
</c03>
</c02>
</c01>
```

Display Of Tagging Example 1:

<unitdate> encoded at all component levels; TYPE, NORMAL, ENCODINGANALOG attributes set

```
Journals and Notebooks, circa 1908-1946

Box 2      1941
           Apr.-May, trip to England

           July-Aug., Roosevelt-Churchill Conference, Placentia Bay,
```

Newfoundland

Comments:

- Date information is important for good descriptive practice; while this information is not always readily available (especially in legacy finding aids), every effort should be made to include this information.
- All material date information should be encoded as `<unitdate>`, no matter what the component level. This may be readily incorporated when container list information is captured in a database, but may take a while to phase in in other conversion routines.
- All `<unitdate>` elements should have the TYPE attribute set. As the most common value will be "inclusive", it may be possible to build this default into creation and conversion tools and modify where appropriate.
- Normalization attributes should be set for dates to take advantage of date searching (not yet implemented at LC). As it may take some time to develop date normalization tools and macros, normalization is required only at the collection level but recommended at the series and subseries level, where it can be easily coded by hand.
- Date normalization will follow ISO standard 8601. Follow this normalization standard also for `<date>` elements normalized in the `<eadheader>` and elsewhere as appropriate. See RLG Best Practice Guidelines for a fuller discussion of date normalization.
- Note that some `<unittitle>` elements consist solely of `<unitdate>` information. See Example 1.

Repeatable: yes**Order:** within `<c><did><unittitle>`**Revision Date:** 05/05/08

3.3.7.3.3 Physical Description

Tag:`<physdesc>`**Description:**

Statement of extent regarding an individual component, such as folder or volume count.

LC Practice recommends the inclusion of physical description information as appropriate to indicate when a single intellectual component includes more than one physical component. Include folder and volume counts within the `<extent>` subelement of `<physdesc>`.

See Also:

Section 3.3.1.5, Physical Description [Go To Section](#)

Section 3.3.7.4, Expanded Description of Components [Go To Section](#)

Subelements:

```
<extent encodinganalog="300">
```

See Tag Library for discussion of other subelements `<dimensions>`, `<genreform>`, and `<physfacet>`.

Tagging Example 1:

Folder count and volume count both encoded as `<physdesc><extent>`

```
<c02 level="file">
<did>
```

```

<unittitle encodinganalog="245$a">Correspondence,
<unitdate encodinganalog="245$f" type="inclusive" normal="1960/1965">1960-1965</unitdate>
</unittitle>
<physdesc>
  <extent encodinganalog="300">(2 folders)</extent>
</physdesc>
</did>
</c02>
<c02 level="file">
  <did>
    <unittitle encodinganalog="245$a">Diaries,
    <unitdate encodinganalog="245$f" type="inclusive" normal="1902">1902</unitdate>
    </unittitle>
    <physdesc>
      <extent encodinganalog="300">(3 vols.)</extent>
    </physdesc>
    </did>
  </c02>

```

Display Of Tagging Example 1:

```

Correspondence, 1960-1965
      (2 folders)
Diaries, 1902
      (3 vols.)

```

Comments:

- Past practice varied among divisions as to whether extent information was included directly under the <physdesc> tag or within <extent> tags in <physdesc>. Future finding aids will be encoded using <physdesc><extent>, since extent is a required element in ISAD-G.

Repeatable: yes

Order: within <c><did>

Revision Date: 03/18/03

3.3.7.3.4 Abstracts

Tag:

<abstract>

Description:

In the past, <abstract> has been used in the container list for brief, summary information about the contents of a component, e.g., list of selected correspondents.

LC Practice now recommends using <scopecontent> for all description of component contents rather than distinguishing between <abstract> and <scopecontent>.

See Also:

Section 3.3.1.8, Abstract [Go To Section](#)

Section 3.3.7.4, Expanded Description of Components [Go To Section](#)

Comments:

- Past practice at LC attempted to distinguish between the uses of `<abstract>` and `<scopecontent>` for component-level description. The `<abstract>` element was added to the EAD DTD to allow for brief summary description of the collection as a whole; while it is valid at the component level, evolving community standards deprecate this use. Instead, `<scopecontent>`, an ISAD-G element, should be used in component descriptions.

Repeatable: yes**Revision Date:** 03/18/03**3.3.7.3.5 ID Numbers****Tag:**`<unitid>`**Description:**

At the component level, `<unitid>` is used for unique logical identifiers associated with that component, such as a file number or lot number; it should not be confused with the `<container>` element, which is used to identify physical housing aspects such as boxes, folders, and reels of microfilm. Both container numbers and ID numbers may be used in a single container list.

LC Practice recommends the use of `<unitid>` for identifying numbers assigned either by the repository or by the creator of the collection materials. When numbers are assigned by the repository and used for the retrieval of collection material, repeat identification numbers at each component level.

See Also:

Section 3.3.1.3, ID of the Unit [Go To Section](#)

Labels/heads:

label="Call no.:" (or another appropriate label; use no label if output display not desired)

Encoding Analog:

050, 090, 099, or other MARC field as appropriate (see catalog record). Creator-supplied identification numbers may have no encoding analog.

Tagging Example 1:

Lot numbers assigned by repository using `<unitid>` given at each component level

```
<c01 level="series">
  <did>
    <unittitle encodinganalog="245$a">PEOPLE AND GROUPS, <unitdate encodinganalog="260$a"
type="inclusive" normal="1884/1967">ca. 1884-1967</unitdate></unittitle>
    <unitid encodinganalog="050" label="Call no.:">LOT 13074</unitid>
  </did>
  <c02 level="file">
    <did>
      <unittitle encodinganalog="245$a">Identified individual portraits</unittitle>
      <unitid encodinganalog="050" label="Call no.:">LOT 13074</unitid>
    </did>
    <c03 level="file">
      <did>
        <unittitle encodinganalog="245$a">Adams, A., Mr.</unittitle>
        <unitid encodinganalog="050" label="Call no.:">LOT 13074, no. 1 (F)</unitid>
      </did>
```

```

</c03>
<c03 level="file">
  <did>
    <unittitle encodinganalog="245$a">Adams, Oscar</unittitle>
    <unitid encodinganalog="050" label="Call no.:">LOT 13074, no. 2 (F)</unitid>
  </did>
</c03>
<c03 level="file">
  <did>
    <unittitle encodinganalog="245$a">Addington, Wendell</unittitle>
    <unitid encodinganalog="050" label="Call no.:">LOT 13074, no. 3 (F)</unitid>
  </did>
</c03>
</c02>
</c01>

```

Display Of Tagging Example 1:

Lot numbers assigned by repository using `<unitid>`

```

PEOPLE AND GROUPS, ca. 1884-1967
Call no.: LOT 13074
  Identified individual portraits      Call no.: LOT 13074
    Adams, A., Mr.      Call no.: LOT 13074, no. 1 (F)
    Adams, Oscar      Call no.: LOT 13074, no. 2 (F)
    Addington, Wendell      Call no.: LOT 13074, no. 3 (F)

```

Tagging Example 2:

Case numbers assigned by creator using `<unitid>` in Container List also having container elements

```

<c02 level="subseries">
  <did>
    <container type="box">I:267</container>
    <unittitle encodinganalog="245$a">Case Files, <unitdate encodinganalog="245$f" type="inclusive"
normal="1971/1975">1971-1975</unitdate></unittitle>
  </did>
  <c03 level="file">
    <did>
      <unittitle encodinganalog="245$a">Opinions</unittitle>
    </did>
    <c04 level="file">
      <did>
        <unitid>71-237</unitid>
        <unittitle encodinganalog="245$a">Mancusi v. Stubbs</unittitle>
      </did>
    </c04>
    <c04 level="file">
      <did>
        <unitid>71-244</unitid>
        <unittitle encodinganalog="245$a"><emph>In re</emph> Little</unittitle>
      </did>
    </c04>
  </c03>
</c02>

```

Display Of Tagging Example 2:

Case numbers assigned by creator using `<unitid>` in Container List also having container elements

```
Box I: 267 Case Files, 1971-1975
        Opinions
          71-237 Mancusi v. Stubbs
          71-244 In re Little
```

Comments:

- In order to identify the location of components within a container list for retrieval purposes, some divisions use `<unitid>` predominantly in their container lists (e.g., P&P, for lot numbers) . When `unitid` is the identifier by which collection material is retrieved, repeat this information at every component level for better search results, data extraction, and navigation of long lists of headings. See Example 1.
- Other divisions use `<container>` predominantly (e.g., MSS, for box and reel numbers), depending on the nature of the retrieval system used. In some situations both `<unitid>` and `<container>` numbers will be appropriate within a single collection. See Example 2.
- See Tag Library and Application Guidelines for further clarification of the differences between `<unitid>` and `<container>`.

Repeatable: yes

Order: within `<c><did>`

Revision Date: 05/05/08

3.3.7.3.6 Physical Location Information**Tag:**

`<physloc>`

Description:

At the component level, `<physloc>` is used to specify a physical location for that component which differs from the rest of the collection (such as offsite storage, or housing in a separate custodial unit).

See Also:

Section 3.3.1.10, Physical Location [Go To Section](#)

Encoding Analog: 852\$z, 090, or other MARC field as appropriate (see catalog record)

Tagging Example 1:

`<physloc>` indicates repository material physically housed elsewhere in Library

```
<c01 level="series">
  <did>
    <unittitle encodinganalog="245$a" id="series2">SERIES II: SOUND
    RECORDINGS</unittitle>
    <physloc encodinganalog="852$z">The originals and preservation
    masters are located in Motion Picture, Broadcasting, and
    Recorded Sound (M/B/RS) at the Library of Congress. See
    Collection Concordance by Format.</physloc>
  </did>
```

`</c01>`**Display Of Tagging Example 1:**`<physloc>` indicates repository material physically housed elsewhere in Library

SERIES II: SOUND RECORDINGS

The originals and preservation masters are located in Motion Picture, Broadcasting, and Recorded Sound (M/B/RS) at the Library of Congress. See Collection Concordance by Format.

Repeatable: yes**Order:** within `<c><did>`**Revision Date:** 03/18/03**3.3.7.3.7 Container Information****Tag:**`<container>`**Description:**

Container numbers and control numbers are used to identify physical housing aspects such as boxes, folders, and reels of microfilm. Setting the correct attribute type to identify variety of container will allow appropriate displays to be generated. Labels may be used to provide further information specific to the container.

The arrangement of the physical collection into containers is less important than the intellectual order; therefore, the nesting of components within the container list is based on intellectual order. When container information is given in a finding aid, it should be associated with each component level to provide the clearest association between the intellectual description and information required for physical retrieval.

LC Practice recommends as minimum best practice that container information such as box, box/folder, or reel numbers given in a finding aid should be repeated at the lowest (e.g., folder) level for better search results, data extraction, and navigation of long lists of headings.

LC practice also requires that the TYPE attribute be set for each container as its value is used to correctly label container number displays.

See Also:

Section 3.3.7.3.5, ID Numbers [Go To Section](#)

Labels/heads:

Use only as appropriate, e.g.:

- label="Restricted"
- label="Not filmed"

Other Attributes:

Choose required TYPE attribute as appropriate. Typical values would be:

- type="box"

- type="folder"
- type="reel"
- type="frame"
- type="box-folder"
- type="box/folder"
- type="item"
- type="mss"

Tagging Example 1:

TYPE attribute set; container numbers repeated

```
<c02 level="file">
  <did>
    <container type="box">1</container>
    <container type="folder">1</container>
    <container type="reel">1</container>
    <unittitle encodinganalog="245$a">Correspondence, <unitdate encodinganalog="245$f" type="inclusive"
normal="1912/1962">1912-1962</unitdate></unittitle>
  </did>
</c02>
<c02 level="file">
  <did>
    <container type="box">1</container>
    <container type="folder">2</container>
    <container type="reel">1</container>
    <unittitle encodinganalog="245$a">Diaries, <unitdate encodinganalog="245$f" type="inclusive"
normal="1955/1962">1955-1962</unitdate></unittitle>
  </did>
</c02>
```

Display Of Tagging Example 1a:

TYPE attribute used to generate display label for container numbers in left column

```
Box 1 Folder 1 Reel 1 Correspondence, 1912-1962
      Folder 2          Diaries, 1955-1962
```

Note: display of repeated container numbers suppressed

Display Of Tagging Example 1b:

TYPE attribute used to generate display label for container numbers in left column

```
Box 1 Folder 1 Reel 1 Correspondence, 1912-1962
Box 1 Folder 2 Reel 1 Diaries, 1955-1962
```

Note: all container numbers displayed

Display Of Tagging Example 1c:

TYPE attribute used to generate display label

```
Correspondence, 1912-1962 [Box 1 Folder 1 Reel 1]
```

```
Diaries, 1955-1962 [Box 1 Folder 2 Reel 1]
```

Note: container information display subordinates the container information by placement to right of text and with smaller font

Tagging Example 2:

TYPE attribute set for multiple container types

```
<c02 level="file">
  <did>
    <container type="box">5</container>
    <container type="item">1</container>
    <unittitle encodinganalog="245$a">Diary, <unitdate encodinganalog="245$f" type="inclusive"
normal="1912">1912</unitdate></unittitle>
  </did>
</c02>
<c02 level="file">
  <did>
    <container type="box">5</container>
    <container type="item">2</container>
    <unittitle encodinganalog="245$a">Journal, <unitdate encodinganalog="245$f" type="inclusive"
normal="1924/1925">1924-1925</unitdate></unittitle>
  </did>
</c02>
<c02 level="file">
  <did>
    <container type="box">5</container>
    <container type="item">3</container>
    <unittitle encodinganalog="245$a">Scrapbook, <unitdate encodinganalog="245$f" type="inclusive"
normal="1917">1917</unitdate></unittitle>
  </did>
</c02>
```

Display Of Tagging Example 2:

TYPE attribute set for multiple container types

```
Box 5 Item 1      Diary, 1912
Box 5 Item 2      Journal, 1924-1925
Box 5 Item 3      Scrapbook, 1917
```

Tagging Example 3:

Box/folder numbers and oversize identified with less specific attribute value 'box'

```
<c03 level="file">
  <did>
    <container type="box">328/1-28</container>
    <unittitle encodinganalog="245$a"><unitdate encodinganalog="245$f" type="inclusive"
normal="1983-10/1987-10">October 1983-October 1987</unitdate></unittitle>
  </did>
</c03>
<c03 level="file">
  <did>
    <container type="box">OV 1</container>
    <unittitle encodinganalog="245$a"><unitdate encodinganalog="245$f" type="inclusive"
normal="1988-01/1992-12">January 1988-December 1992</unitdate></unittitle>
```

```
</did>
</c03>
```

Display Of Tagging Example 3:

Box/folder numbers and oversize identified with less specific attribute value 'box'

```
Box 328/1-28      October 1983-October 1987
Box OV 1         January 1988-December 1992
```

Tagging Example 4:

TYPE and LABEL attributes set

```
<c02 level="file">
  <did>
    <container type="box" label="Restricted">26</container>
    <unittitle encodinganalog="245$a">Financial records, <unitdate encodinganalog="245$f" type="inclusive"
normal="1986/1995">1986-1995</unitdate></unittitle>
  </did>
</c02>
```

Display Of Tagging Example 4:

TYPE and LABEL attributes set

```
Box 26 (Restricted)      Financial records, 1986-1995
```

Tagging Example 5:

LABEL attribute value displays where no container number given

```
<c02 level="file">
  <did>
    <container type="box">61</container>
    <container type="reel">43-44</container>
    <unittitle encodinganalog="245$a">United States Post Office
patronage, political and postmaster lists, <unitdate encodinganalog="245$f" type="inclusive"
normal="1860/1865">1860-1865</unitdate></unittitle>
  </did>
</c02>
<c02 level="file">
  <did>
    <container type="box">62</container>
    <container label="Not filmed"/>
    <unittitle encodinganalog="245$a">Financial papers</unittitle>
  </did>
</c02>
```

Display Of Tagging Example 5:

LABEL attribute value displays where no container number given

```
Box 61      Reel 43-44      United States Post Office patronage, political
and postmaster lists, 1860-1865
```

| | | |
|--------|------------|------------------|
| Box 62 | Not filmed | Financial papers |
|--------|------------|------------------|

Tagging Example 6:

Contents of lowest-level component spans containers (preferred descriptive practice in Example 7)

```
<c04 level="file">
  <did>
    <container type="box">16-17</container>
    <unittitle encodinganalog="245$a">Reviews, <unitdate encodinganalog="245$f" type="inclusive"
normal="1955/1957">1955-1957</unitdate></unittitle>
    <container type="box">16</container>
    <physdesc>
      <extent encodinganalog="300">(2 folders)</extent>
    </physdesc>
    <container type="box">17</container>
    <physdesc>
      <extent encodinganalog="300">(3 folders)</extent>
    </physdesc>
  </did>
</c04>
```

Display Of Tagging Example 6:

Contents of lowest-level component spans containers (preferred descriptive practice in Example 7)

| | |
|-----------|--------------------------|
| Box 16-17 | Reviews, 1955-1957, n.d. |
| Box 16 | (2 folders) |
| Box 17 | (3 folders) |

Tagging Example 7:

Preferred practice to create subordinate component levels where container breaks occur

```
<c04 level="file">
  <did>
    <container type="box">16-17</container>
    <unittitle encodinganalog="245$a">Reviews</unittitle>
  </did>
  <c05 level="file">
    <did>
      <container type="box">16</container>
      <unittitle encodinganalog="245$a">
        <unitdate encodinganalog="245$f" normal="1955/1956">1955-1956</unitdate>
      </unittitle>
      <physdesc>
        <extent encodinganalog="300">(2 folders)</extent>
      </physdesc>
    </did>
  </c05>
  <c05 level="file">
    <did>
      <container type="box">17</container>
      <unittitle encodinganalog="245$a">
```



```

<unitdate encodinganalog="245$f" normal="1957">1957</unitdate>
</unittitle>
<physdesc>
  <extent encodinganalog="300">(3 folders)</extent>
</physdesc>
</did>
</c05>
</c04>

```

Display Of Tagging Example 7:

Preferred practice to create subordinate component levels where container breaks occur

```

Reviews    [Box 16-17]
  1955-1956 [Box 16]
    (2 folders)

  1957    [Box 17]
    (3 folders)

```

Note: display subordinates container information by placement to right of text and smaller font

Comments:

Repeated container information:

- When container information is listed in a finding aid, it should be given at each component level to clearly associate intellectual description with information needed for retrieval. Past practice has been to give container numbers only at the component level for the first component housed in that container, and using visual cues to imply that container numbers remain the same until the next number is given at the beginning of the following container. This practice is useful only when the visual display of the finding aid reflects established print practice but is unclear if component information is given in any other context, and even when lengthy listings within a container make extensive scrolling necessary to determine information necessary for the retrieval of the physical item.
- When container information is given in a finding aid, the minimum acceptable practice is the prior practice above; the minimum best practice is to repeat container information such as box, box/folder, or reel numbers at the lowest (e.g., folder) level. The examples above give container information (a single number or range of numbers) at every component level.
- The ease of including container information in finding aids being authored and encoded will depend on the encoding method used: immediate change will not be possible in all cases.
- Some display options for repeated information are to display as encoded, suppress repeated information, or to subordinate the container information to the intellectual descriptions. See display options in Examples 1 and 7.
- When box and folder numbers are included in a finding aid, it is also possible to use the "parent" attribute of the container element to associate folder numbers with a box number without repeating the box number. For more information see Section 7.2.5 of the Application Guidelines.

TYPE attribute:

- The TYPE attribute should be set in order to generate a display constant to accompany the container number (e.g., Box 17, Folder 2, Reel 4, etc.) Multiple types of containers may be indicated. See Examples 1 and 2.
- Do not include information as part of the container number value which is already expressed as part of the attribute value. If you encode <container type="folder">Folder 1</container>, your display will be FOLDER Folder 1.
- While the TYPE attribute should be used to indicate the basic nature of the storage device, it is not necessary to use the most specific type available when the display need not be labeled as such. For instance, box/folder numbers

in Music Division finding aids could be coded as `<container type="box-folder">2/16</container>` but could also validly be encoded as `<container type="box">2/16</container>` and displayed as "Box 2/16". Similarly, an oversized container could be encoded `<container type="oversize">2</container>` to display as "Oversize 2", but could also be encoded as `<container type="box">OV 2</container>` with display "Box OV 2." See Example 3.

LABEL attribute:

- LABEL attributes can be used to record information about containers in addition to the type value: for instance `<container type="box" label="restricted">13</container>` could be displayed as Box 13 (Restricted). See Example 4.
- In some cases container-type information can be recorded as a LABEL attribute to an empty `<container>` tag. In this case, no type attribute would be set. Example: `<container label="not filmed"></container>` would display as "Not filmed" in lieu of a container number. See Example 5.

Container numbers and box breaks:

- If the lowest component level is broken between two or more containers, statements of extent for the contents of each container and the container numbers will be recorded within the same component and `<did>`. See Example 6 for this discouraged but sometimes unavoidable practice. Best practice in arranging and describing such components creates subordinate components based on the arrangement, when possible. See Example 7 for a possible resolution to problem illustrated in Example 6.

Repeatable: yes

Revision Date: 05/05/08

3.3.7.4 Expanded Description of Components

Description:

Elements which are available to describe the collection as a whole may also be used outside the `<did>` at the component level to which they best apply. Such elements include `<scopecontent>` and `<arrangement>`, as well as elements formerly subordinate to `<admininfo>` and `<add>`. Other `<did>` subelements not separately described in the Application Guidelines are also illustrated here.

See Also:

Section 2.1.3, Note [Go To Section](#)

Section 3.3.1.8, Abstract [Go To Section](#)

Section 3.3.1.9, Note [Go To Section](#)

Section 3.3.1.11, Digital Archival Object Group [Go To Section](#)

Section 3.3.3, Administrative Information [Go To Section](#)

Section 3.3.4, Biographical Sketches and Agency Histories [Go To Section](#)

Section 3.3.5, Scope and Content Note [Go To Section](#)

Section 3.3.6, Arrangement [Go To Section](#)

Section 3.3.8, Adjunct Descriptive Data [Go To Section](#)

Section 3.3.9, Other Descriptive Data [Go To Section](#)

Section 3.3.3, for encoding analogs of former `<admininfo>` subelements [Go To Section](#)

Encoding Analog: 520 (scopecontent), 500 (note, odd).

Tagging Example 1:

Component described with `<scopecontent>` (2 paragraphs)

```
<c02 level="file">
<did>
<container type="folder">998</container>
<unittitle encodinganalog="245$a">NBC Network Affiliates,
<unitdate encodinganalog="245$f" type="inclusive" normal="1935/1989">1935-1989.</unitdate>
</unittitle>
</did>
<scopecontent encodinganalog="520">
<p>Original, onionskin, mimeographed, and photocopied letters,
memoranda, reports, maps, press releases, and telegrams related to
the NBC network and affiliates.</p>
<p>Highlights: February 5, 1937, 42-page "Report on the Study for
Improving National Broadcasting Company Network Facilities." April
17, 1939, NBC network facilities map. June 28, 1934, 3-page letter
from WSYR of Syracuse, New York to NBC complaining of NBC's
neglect of the Blue Network in favor of the Red Network. May, 1951
4-page report on the growth and development of the NBC television
network.</p>
</scopecontent>
</c02>
```

Display Of Tagging Example 1:

Component described with `<scopecontent>` (2 paragraphs)

```
998          NBC Network Affiliates, 1935-1989

          Original, onionskin, mimeographed, and photocopied letters, memoranda,
reports, maps, press releases, and telegrams related to the NBC
network and affiliates.

          Highlights: February 5, 1937, 42-page "Report on the Study for
Improving National Broadcasting Company Network Facilities." April 17,
1939, NBC network facilities map. June 28, 1934, 3-page letter from
WSYR of Syracuse, New York to NBC complaining of NBC's neglect of the
Blue Network in favor of the Red Network. May, 1951 4-page report on
the growth and development of the NBC television network.
```

Tagging Example 2:

`<note>` within `<did>`

```
<c02 level="file">
<did>
<container type="box">3</container>
<unittitle encodinganalog="245$a">Computer diskettes containing
documents generated during collection processing, documents/files
used to build the online presentation, and backup
copies</unittitle>
<note encodinganalog="500">
<p>Note: Disk directories can be found in Folder #1 with the
Collection Guide.</p>
</note>
</did>
```

```
</c02>
```

Display Of Tagging Example 2:

`<note>` within `<did>`

Box 3

Computer diskettes containing documents generated during collection processing, documents/files used to build the online presentation, and backup copies

Note: Disk directories can be found in Folder #1 with the Collection Guide.

Tagging Example 3:

`<materialspec>` and `<odd>` for map elements

```
<c03 level="file">
  <did>
    <unittitle encodinganalog="245$a">Eastern Asia 1:1,000,000. Canton</unittitle>
    <physdesc>
      <extent>1 map</extent>
      <dimensions>660 x 710 cm.</dimensions>
    </physdesc>
    <materialspec type="scale" encodinganalog="255">1:100,000</materialspec>
    <materialspec type="projection" encodinganalog="255">Modified Polyconic</materialspec>
  </did>
  <odd type="notes" encodinganalog="500">
    <p>Accompanied by graphic flight line index (incomplete).</p>
    <p>Sortie 35PR 4MH 29. Height 30,000 ft.</p>
  </odd>
</c03>
```

Display Of Tagging Example 3:

`<materialspec>` and `<odd>` for map elements

```
Eastern Asia 1:1,000,000. Canton
  1 map; 660 x 710 cm.
  Scale: 1:100,000
  Projection: Modified Polyconic
  Notes: Accompanied by graphic flight line index (incomplete).
         Sortie 35PR 4MH 29. Height 30,000 ft.
```

Tagging Example 4:

Includes `<scopecontent>`, `<arrangement>`, and `<altformavail>`

```
<c01 level="series">
  <did>
    <container type="box">1-3</container>
    <unittitle encodinganalog="245$a" id="diary">Diaries, <unitdate encodinganalog="245$f" type="inclusive"
normal="1910/1945">1910-1945.</unitdate></unittitle>
  </did>
```

```

<scopecontent encodinganalog="520">
  <p>Holograph and typewritten diaries, bound and unbound.</p>
</scopecontent>
<arrangement encodinganalog="351$b">
  <p>Arranged in two groups, original and annotated transcripts,
  and therein chronologically.</p>
</arrangement>
<altformavail encodinganalog="520">
  <p>The diary for Sept. 24-Mar. 5, 1943, is available on
  microfilm. Shelf no. 20,613.</p>
</altformavail>
</c01>

```

Display Of Tagging Example 4:

Includes `<scopecontent>`, `<arrangement>`, and `<altformavail>`

| | |
|---------|--|
| Box 1-3 | Diaries, 1910-1945. Holograph and typewritten diaries, bound and unbound. |
| | Arranged in two groups, original and annotated transcripts, and therein chronologically. |
| | The diary for Sept. 24-Mar. 5, 1943, is available on microfilm. Shelf no. 20,613. |

Tagging Example 5:

Restricted container noted at component level and as container attribute

```

<c02 level="subseries">
  <did>
    <container type="box">50-56</container>
    <unittitle encodinganalog="245$a">Financial Papers, <unitdate encodinganalog="245$f" type="inclusive"
    normal="1936/1969">1936-1969</unitdate></unittitle>
  </did>
  <scopecontent encodinganalog="520">
    <p>Correspondence, accounting statements, reports, and printed
    matter concerning financial contributions and other fund-raising
    activities as well as the general financial situation of the
    colony.</p>
  </scopecontent>
  <arrangement encodinganalog="351$b">
    <p>Arranged alphabetically by subject.</p>
  </arrangement>
  <accessrestrict encodinganalog="506">
    <p>Container 56 is <emph render="bold">restricted</emph> until 1999.</p>
  </accessrestrict>
  <c03 level="file">
    <did>
      <container label="restricted" type="box">56</container>
      <unittitle encodinganalog="245$a">Financial
      problems</unittitle>
    </did>
    <c04 level="file">
      <did>
        <unittitle encodinganalog="245$a">Finance Committee, <unitdate encodinganalog="245$f" type="inclusive"
        normal="1957/1967">1957-1967</unitdate></unittitle>

```

```

</did>
</c04>
</c03>
</c02>

```

Display Of Tagging Example 5:

Restricted container noted at component level and as container attribute

```

Box 50-56      Financial Papers, 1936-1969

                Correspondence, accounting statements, reports, and
                printed matter concerning financial contributions
                and other fund-raising activities as well as the
                general financial situation of the colony.

                Arranged alphabetically by subject.
                Container 56 is restricted until 1999.

Box 56 (Restricted)  Financial problems
                    Finance Committee, 1957-1967

```

Tagging Example 6:

<daogrp> link at folder level to hit list of digitized items

```

<c02 level="file">
  <did>
    <unittitle encodinganalog="245$a" id="clgencorr">Photograph album</unittitle>
    <daogrp>
      <daoloc href="&mcc051;">
        <daodesc>
          <p>Items available online.</p>
        </daodesc>
      </daoloc>
    </daogrp>
  </did>
</c02>

```

Display Of Tagging Example 6:

<daogrp> link at folder level to hit list of digitized items

```

Photograph album
  Items available online.

```

Link leads to presentation page for navigable album of cartes des visites

Comments:

- Use <scopecontent> rather than <abstract> or <note> for summary descriptions of the contents of a component. Scopecontent may be very brief or may contain multiple paragraphs. See Example 1.
- When <note> is appropriate, use inside the <did> rather than outside for convenience in generating displays. See Example 2.

- Use `<odd>` for component information which does not correspond to another element's definition, for information of mixed content, when additional narrative description is included, and when more specific tagging would be too burdensome or costly. See Example 3.
- Use `<scopecontent>` and `<arrangement>` at the series level to describe contents of the series and arrangement or organization therein. Although `<arrangement>` is available inside the `<scopecontent>`, we recommend encoding at the same level as `<scopecontent>`. See Example 4. Sometimes arrangement will be inextricably intertwined with scope information and cannot be marked separately.
- The use of elements formerly subordinate to `<admininfo>` at the component level will usually be a supplement to general information already given at the collection level. See Examples 4 and 5. For instance, the collection-level `<descgrp>` will have an `<accessrestrict>` statement that some material within the collection is restricted. At the appropriate component level (e.g., within `<c01>` for a restricted series), you may note within `<accessrestrict>` that the series is restricted.
- Use `<daogrp>` and its subelement `<daoloc>` for one or more archival objects. Former LC practice was to use `<dao>` instead for a single digital archival object. See the RLG Best Practice Guidelines for discussion of this practice.
- Use `<daogrp>` in components at the folder or item level when digitization has taken place selectively. Even if links are made to single intellectual items, the `<daoloc>` link will probably point to a presentation mechanism which allows options between various versions of the object (jpeg, tif, etc.), or navigation among the parts of an object (pages of a multipage document). Direct links to single digital files are possible but not encouraged: it is better to stay within the framework of digital file storage and navigation already established at the Library. See Example 6.
- Use `<daogrp>` at the series (or subseries) level when most or all of a collection or series has been digitized and there are external navigational aids, such as the American Memory interface, which mirrors the arrangement in the container list.
- When multiple items in a folder are digitized and description stops at the folder level, the `<daoloc>` will probably point to a hit list whose links point to the items within the folder, probably not in the order found in the physical folder.

Repeatable: yes

Order: within `<c>` or `<c><did>`

Revision Date: 05/05/08

3.3.8 Adjunct Descriptive Data

Tag:

`<descgrp type="add">`

Description:

This wrapper element can be used to assemble supplemental information that facilitates the use of the materials being described in the finding aid. These additional access tools, such as indexes, file plans, other finding aids, and descriptions of related and separated materials, may occur as "back-of-book" materials directly under `<archdesc>`, or may be used at the most appropriate component level. Adjunct data which does not fit into the major subelements below should be encoded as other descriptive data (`<odd>`).

LC Practice permits use of adjunct descriptive data as needed, whether bundled or treated as individual elements, to facilitate the use of collection materials. Adjunct descriptive data subelements are directly available within `<archdesc>` and within components. Alternatively, these elements may be pulled together within a generic descriptive group `<descgrp>` element with TYPE attribute set to "add".

See Also:

Section 3.3.7.4, Expanded Description of Components [Go To Section](#)

Section 3.3.9, Other Descriptive Data [Go To Section](#)

Labels/heads:

Choose or formulate required `<head>` appropriate to content, e.g.:

- Appendix (general purpose; can use for overall `<add>` if multiple separate elements)

Subelements:

All elements are repeatable and may be used in any order. Do not use generic text formatting elements such as `<p>`, `<list>` and `<table>` directly under `<descgrp>` except to supplement these subelements as appropriate.

`<bibliography>` See 3.3.8.1, Bibliographies

`<fileplan>` See 3.3.8.2, File Plans

`<index>` See 3.3.8.3, Indexes

`<otherfindaid>` See 3.3.8.4, Other Finding Aids

`<relatedmaterial>` See 3.3.8.5, Related Material

`<separatedmaterial>` See 3.3.8.6, Separated Material

Comments:

- Adjunct descriptive data that applies to a portion of the collection material may be given at that component level, but this is not a strict requirement. For instance, a lengthy index to a correspondence series might appear after the entire container list as long as it is labelled as such. This would prevent a break in the "flow" of the container list. Note, however, that there is tension between this practice and the principle of multi-level description as described in ISAD-G.
- Adjunct descriptive data that applies to the entire collection (e.g., a bibliography or file plan) is considered "back-of-the-book" material but need not appear at the end of the finding aid. After the collection-level `<did>` (Collection Summary), the order of elements is not fixed and adjunct descriptive data may appear wherever needed. For instance, a description of related material might be as appropriately placed after `<scopecontent>` as at the end of the container list.

Repeatable: yes (and recursive)

Order: following `<dsc>`

Revision Date: 05/05/08

3.3.8.1 Bibliographies

Tag:

`<bibliography>`

Description:

The bibliography element can be used to group citations to works of any type, such as books, articles, sound recordings, etc., that are about, based on, or would be helpful to researchers using the described materials. Formatting subelements such as `<list>` and `<table>` can be used but are not necessary since formatting can be controlled using style sheets. As with other adjunct descriptive data elements, it can be used at the collection level as well as at the appropriate component level.

LC Practice recommends that bibliographies at the `<archdesc>` level appear after the Container List.

See Also:

Section 3.3.7.4, Expanded Description of Components [Go To Section](#)

Labels/heads:

Choose or formulate required [<head>](#) appropriate to content, e.g.:

- Bibliography
- Major Works of Archibald MacLeish

Subelements:

[<bibref>](#)

[<archref>](#)

Generic text formatting elements such as [<note>](#), [<list>](#) and [<table>](#) can also be used directly under [<bibliography>](#). See Tag Library for full list of valid subelements.

Tagging Example 1:

[<bibliography>](#) at [<archdesc>](#) level; [<title>](#) is only subelement under [<bibref>](#)

```
<bibliography>
<head>Bibliography</head>
<bibref>
<title>Claire Van Vliet, Printmaker and Printer: a Selection of Prints
and Illustrated Books from the Janus Press at the Rutgers University
Art Gallery in New Brunswick, New Jersey, from November 5 to December
17, 1978.</title> New Brunswick, N.J.: Rutgers University Art Gallery,
1978.
</bibref>
<bibref>Fine, Ruth.
<title>Claire Van Vliet--Landscape Paperworks, Dolan/Maxwell Gallery,
Philadelphia, Pa., November 1984, Mickelson Gallery, Washington, D.C.,
February-March 1985.</title> Dalton, Mass.: Studley Press, c1984.
</bibref>
<archref>Van Vliet, Claire. King Lear Archive: preparatory
materials for an illustrated edition of King Lear, 1984-86. Rare
Book and Special Collections Division, Library of Congress.
</archref>
</bibliography>
```

Display Of Tagging Example 1:

[<bibliography>](#) at [<archdesc>](#) level; [<title>](#) is only subelement under [<bibref>](#)

Bibliography

Claire Van Vliet, Printmaker and Printer: a Selection of Prints and Illustrated Books from the Janus Press at the Rutgers University Art Gallery in New Brunswick, New Jersey, from November 5 to December 17, 1978. New Brunswick, N.J.: Rutgers University Art Gallery, 1978.

Fine, Ruth. Claire Van Vliet--Landscape Paperworks, Dolan/Maxwell Gallery, Philadelphia, Pa., November 1984, Mickelson Gallery, Washington, D.C., February-March 1985. Dalton, Mass.: Studley Press, c1984.

Van Vliet, Claire. King Lear Archive: preparatory materials for an illustrated edition of King Lear, 1984-86. Rare Book and Special Collections Division, Library of Congress.

Tagging Example 2:

<bibliography> at <archdesc> level arranged by imprint date

```
<descgrp type="add">
<head>Appendix</head>
<bibliography>
<head>Major Works of Archibald MacLeish</head>
<bibref>
<imprint>
<date>1924</date>
</imprint>
<title>The Happy Marriage, and Other Poems</title> (Boston and
New York: Houghton Mifflin. 79 pp.)
</bibref>
<bibref>
<imprint>
<date>1925</date>
</imprint>
<title>The Pot of Earth</title> (Boston and New York: Houghton
Mifflin. 44 pp.)
</bibref>
</bibliography>
</descgrp>
```

Display Of Tagging Example 2:

<bibliography> at <archdesc> level arranged by imprint date

```

Appendix

Major Works of Archibald MacLeish

1924

The Happy Marriage, and Other Poems (Boston and New York: Houghton
Mifflin. 79 pp.)

1925

The Pot of Earth (Boston and New York: Houghton Mifflin. 44 pp.).
```

Comments:

- Bibliographies are most commonly composed of bibref and/or archref elements but may also contain explanatory notes or additional formatting.
- A variety of elements are available in <bibref>. Generally speaking, the only one that should always be used is the <title> element which should be displayed in a typographically distinct fashion (i.e., in italics). See Example 1.
- Additional subelements of <bibref> may be used if there is a reason based on searching or display for the elements to be rendered distinctly. For instance, if a bibliography is arranged chronologically, you may wish to separately

encode the imprint date. See Example 2. Alternately, this could have been encoded without using `<bibref>` as a `<chronlist>` within `<bibliography>`. See Tag Library under `<chronlist>`.

- Both `<bibref>` and `<archref>` can be used to link to the materials described if they are available online. See Section 2.2 for further information on linking elements.

Repeatable: yes (and recursive)

Order: following `<dsc>`

Revision Date: 4/15/03

3.3.8.2 File Plans

Tag:

`<fileplan>`

Description:

The `<fileplan>` element is used to encode any filing scheme used by the creator of the collection materials. This may be within a list, table, or any generic formatting elements.

See Also:

Section 3.3.7.4, Expanded Description of Components [Go To Section](#)

Labels/heads:

Choose or formulate required `<head>` appropriate to content, e.g.

- File Plan
- Headings Used in Card File Subject Index

Subelements:

Generic text formatting elements such as `<note>`, `<p>`, `<list>` are used directly under `<fileplan>`. See Tag Library for full list of valid subelements.

Tagging Example 1:

`<fileplan>` at `<archdesc>` level

```
<fileplan>
<head>Headings Used in Card File Subject Index</head>
<note>
<p>Listed exactly as arranged, which is generally
  alphabetically:</p>
</note>
<list type="simple">
<item>Accounting</item>
<item>Agricultural societies, congresses, etc.</item>
<item>Allston's self-portrait</item>
</list>
</fileplan>
```

Display Of Tagging Example 1:

<[fileplan](#)> at <[archdesc](#)> level

Headings Used in Card File Subject Index

Listed exactly as arranged, which is generally alphabetically:

Accounting
Agricultural societies, congresses, etc.
Allston's self-portrait

Repeatable: yes (and recursive)

Order: following <dsc>

Revision Date: 05/07/03

3.3.8.3 Indexes**Tag:**

<[index](#)>

Description:

The <[index](#)> element is used to encode any list of key terms and reference pointers that has been compiled to facilitate access to the materials. The index enables linking to container numbers or other descriptors in the finding aid, but hypertext links are not required.

LC Practice encourages the encoding of pre-existing indexes which provide names and terms not found elsewhere in the container list, e.g., correspondents in a series arranged chronologically which does not list individual names. An index which links to page numbers of a paper register or one which simply lists alphabetically names easily found with a keyword search may not be worth the trouble to encode and may be omitted from the EAD finding aid.

See Also:

Section 2.2.1, Internal Linking [Go To Section](#)

Section 3.3.2.7, Use of Controlled Vocabulary Outside of <controlaccess> [Go To Section](#)

Section 3.3.7.4, Expanded Description of Components [Go To Section](#)

Labels/heads:

Choose or formulate required <[head](#)> appropriate to content, e.g.

- Index of Correspondents
- Photographs, Index II, Places and Events

Subelements:

<[indexentry](#)>

Generic text formatting elements such as <p>, <list> and <table> can also be used directly under <[index](#)>. See Tag Library for full list of valid subelements of <[index](#)>, <[indexentry](#)>, and <[namegrp](#)>.

Tagging Example 1:

Nonlinking index using specific `<controlaccess>` tags

```
<index>
<head>Names and Titles</head>
<indexentry>
  <persname>Abbado, Claudio</persname>
  <ref>78A/016-26, 88D</ref>
</indexentry>
<indexentry>
  <persname>Abbott, George</persname>
  <ref>53A/092</ref>
</indexentry>
<indexentry>
  <title>Atlantic monthly</title>
  <ref>62A/043</ref>
</indexentry>
</index>
```

Display Of Tagging Example 1:

Nonlinking index using specific `<controlaccess>` tags

```
Names and Titles

Abbado, Claudio
  78A/016-26, 88D
Abbott, George
  53A/092
Atlantic monthly
  62A/043
```

Note: in order to make this example link to the container numbers listed, it would be necessary to split apart the two numbers in the first `<ref>` and code as two refs within `<ptrgrp>`, and to set target attributes for each `<ref>`

Tagging Example 2:

Linking index entries using nonspecific `<name>` tag and including `<ptrgrp>`

```
<indexentry>
  <name>Age Studio:</name>
  <ref target="LOT13074" actuate="onrequest" show="new">LOT 13074</ref>
</indexentry>
<indexentry>
  <name>Air Force Photo:</name>
  <ptrgrp>
    <ref target="LOT13103" actuate="onrequest" show="new">LOT 13103;</ref>
    <ref target="LOT13105" actuate="onrequest" show="new">LOT 13105</ref>
  </ptrgrp>
</indexentry>
```

Display Of Tagging Example 2:

Linking index entries using nonspecific `<name>` tag and including `<ptrgrp>`

```
Age Studio:
LOT 13074
```

```
Air Force Photo:
LOT 13103; LOT 13105
```

Tagging Example 3:

Normalization attribute supplied for name given in direct order in index entry

```
<indexentry>
<persname id="barjacq">Barenboim, Daniel</persname> and
<persname normal="DuPre, Jacqueline">Jacqueline (DuPre)</persname>
<ref>73A/267-268, 270</ref>
</indexentry>
```

Display Of Tagging Example 3:

Normalization attribute supplied for name given in direct order in index entry

```
Barenboim, Daniel and Jacqueline (DuPre)
73A/267-268, 270
```

Tagging Example 4:

Multiple names in index term encoded in <namegrp>

```
<indexentry>
<namegrp>
  <persname source="LCNAF" encodinganalog="700">Barenboim, Daniel</persname>
  <persname source="LCNAF" encodinganalog="700">DuPre, Jacqueline</persname>
</namegrp>
<ref>73A/267-168, 270</ref>
</indexentry>
```

Names under authority control

Display Of Tagging Example 4:

Multiple names in index term encoded in <namegrp>

```
Barenboim, Daniel
DuPre, Jacqueline
73A/267-268, 270
```

Names under authority control

Tagging Example 5:

Multiple names in index term encoded in single <name> and cross-references made

```
<indexentry>
<name>Barenboim, Daniel</name>
<ref target="barjacq" actuate="onrequest" show="new">See Barenboim,
Daniel and Jacqueline (DuPre)</ref>
</indexentry>
<indexentry>
<name id="barjacq">Barenboim, Daniel and Jacqueline (DuPre)</name>
<ref>73A/267-268, 270</ref>
```

```

</indexentry>
<indexentry>
  <name>DuPre, Jacqueline</name>
  <ref target="barjacq" actuate="onrequest" show="new">See Barenboim,
    Daniel and Jacqueline (DuPre)</ref>
</indexentry>

```

Display Of Tagging Example 5:

Multiple names in index term encoded in single `<name>` and cross-references made

```

Barenboim, Daniel
    See Barenboim, Daniel and Jacqueline (DuPre)

Barenboim, Daniel and Jacqueline (DuPre)
    73A/267-268, 270

DuPre, Jacqueline
    See Barenboim, Daniel and Jacqueline (DuPre)

```

Comments:

- Indexes consist primarily of index entries, which are composed of a key term or terms and a reference pointer or pointers. Explanatory notes and additional formatting elements such as lists and tables may be included, but don't use them as a substitute for index entries.
- Key terms in an index entry may be specific to its content, e.g. `<persname>`, `<corpname>`, `<subject>`, or `<title>`, or may be encoded as a nonspecific `<name>` element.
- Whether or not a key term is under authority control, it will usually appear in a normalized (inverted order) form. Use `<persname>`, `<famname>`, etc. if these can readily be determined (see Examples 1, 3, and 4). If names are under authority control, set attributes for SOURCE and ENCODINGANALOG. See Example 4. One may also use the less specific `<name>` element, if it is not desired or easy to separate personal, corporate, and other names. See Examples 2 and 5.
- The name group `<namegrp>` element can be used to bundle access element entries, e.g., several `<famname>` and `<persname>` elements, that share the same `<ref>`, `<ptr>`, or `<ptrgrp>` element. See Example 4.
- However, if punctuation and connecting words must be included between the names, it is possible to tag multiple names in an index term within a single name tag and include a cross reference from the full form of the names. See Example 5.
- An index entry can link using the `<ref>` element to surround the container numbers or other location information that the index entry references. Less commonly used at LC is the pointer `<ptr>` element, which contains no text; it is less clear to users where clicking on an arrow might lead them.
- Use the pointer group `<ptrgrp>` element to bundle several `<ref>` or `<ptr>` links to a single access term. See Example 2.
- See Section 2.2.1 for more information on creating internal links.

Repeatable: yes (and recursive)

Order: following `<dsc>`

Revision Date: 05/05/08

3.3.8.4 Other Finding Aids

Tag:

`<otherfindaid>`

Description:

The `<otherfindaid>` describes additional or alternative guides to the collections being described by the finding aid, such as a card file in the reading room, or a published guide to the collection. This element does not encode the contents of those guides. Links to or lists of finding aids to other collections (related by subject or provenance) should not be encoded as `<otherfindaid>` but as `<relatedmaterial>` or `<separatedmaterial>`, respectively.

See Also:

Section 3.3.7.4, Expanded Description of Components [Go To Section](#)

Labels/heads:

Choose or formulate required `<head>` appropriate to content, e.g.

- Other Finding Aids
- Additional Guides to the XYZ Papers

Encoding Analog: 555

Subelements:

Generic text formatting elements such as `<p>`, `<list>` and `<table>` are used directly under `<otherfindaid>`. See Tag Library for full list of valid subelements.

Tagging Example 1:

`<otherfindaid>` following `<scopecontent>`

```
<otherfindaid encodinganalog="555">
<head>Additional Guides</head>
<p>An annotated inventory describing each item in the collection,
but in an order different from the current arrangement, and a
negative photostatic copy of the inventory with fewer annotations
may be found in the Manuscript Division Reading Room reference
collection. Special card file indexes for the collection exist but
are housed separately from the items themselves. A microfilm
version of these indexes may be found on reel 15 of this
series. To use the original indexes consult the reference staff in
the Manuscript Division Reading Room.</p>
</otherfindaid>
```

Display Of Tagging Example 1:

`<otherfindaid>` following `<scopecontent>`

Additional Guides:

An annotated inventory describing each item in the collection, but in an order different from the current arrangement, and a negative photostatic copy of the inventory with fewer annotations may be found in the Manuscript Division Reading Room reference collection. Special card file indexes for the collection exist but are housed separately from the items themselves. A microfilm version of these indexes may be found on reel 15 of this series. To use the original indexes consult

the reference staff in the Manuscript Division Reading Room.

Comments:

- This element which applies to the entire collection is considered "back-of-the-book" material but need not appear at the end of the finding aid. Information about other finding aids might be given in conjunction with either administrative information or the scope and content note as appropriately as at the end of the container list.

Repeatable: yes (and recursive)

Order: following <dsc>

Revision Date: 4/15/03

3.3.8.5 Related Material**Tag:**

<[relatedmaterial](#)>

Description:

The <[relatedmaterial](#)> element is used to encode information about collections which may be of interest to users of the collection in hand but are not connected by provenance. These collections may be in the same repository, in other institutions, or both.

See Also:

Section 3.3.8.6, Separated Material [Go To Section](#)

Labels/heads:

Choose or formulate head appropriate to content, e.g.

- Related Material
- Related Archival Collections at the Library of Congress

Encoding Analog: 544 1

Subelements:

<[bibref](#)>

<[archref](#)>

Generic text formatting elements such as <[note](#)>, <[list](#)> and <[table](#)> can also be used directly under <[relatedmaterial](#)>. See Tag Library for full list of valid subelements.

Tagging Example 1:

Related material encoded in definition list format

```
<relatedmaterial encodinganalog="544 1">
<head>Related Archival Collections Beyond the Library of
Congress</head>
<list type="deflist">
<defitem>
<label>
<archref>National Broadcasting Company Records at the
Wisconsin State Historical Society
</archref>
```

```

</label>
<item>The State Historical Society of Wisconsin in Madison
maintains archival NBC records for 1929-1969: 564 boxes,
3,264 discs, 21 tapes and 72 reels of microfilm. The
Wisconsin collection includes central files, office files
and a library of scripts and recordings which complement the
NBC Archives at the Library of Congress.</item>
</defitem>
</list>
</relatedmaterial>

```

Display Of Tagging Example 1:

Related material encoded in definition list format

```

                Related Archival Collections Beyond the Library of Congress

National Broadcasting Company Records at the Wisconsin State
Historical Society

        The State Historical Society of Wisconsin in Madison maintains
archival NBC records for 1929 - 1969: 564 boxes, 3,264 discs, 21 tapes
and 72 reels of microfilm. The Wisconsin collection includes central
files, office files and a library of scripts and recordings which
complement the NBC Archives at the Library of Congress.

```

Tagging Example 2:

Related material encoded in paragraph narrative with embedded linking archrefs

```

<relatedmaterial encodinganalog="544 1">
<head>Related Material</head>
<p>Collections in the Manuscript Division supplementing the
Olmsted Papers include <archref href="http://hdl.loc.gov/loc.mss/eadmss.ms001018" show="new"
actuate="onrequest">records of the <origination>Olmsted
Associates,</origination></archref> landscape architects, of
Brookline, Massachusetts, the successor to the firm established by
Frederick Law Olmsted and Calvert Vaux in 1858 and the files of
<archref href="http://hdl.loc.gov/loc.mss/eadmss.ms001020" show="new"
actuate="onrequest"><origination>Laura Wood
Roper,</origination></archref> Olmsted's biographer, which contain
original Olmsted material and Olmsted Associates
correspondence.</p>
</relatedmaterial>

```

Display Of Tagging Example 2:

Related material encoded in paragraph narrative with embedded linking archrefs

```

Related Material

        Collections in the Manuscript Division supplementing the Olmsted
Papers include records of the Olmsted Associates, landscape
architects, of Brookline, Massachusetts, the successor to the firm
established by Frederick Law Olmsted and Calvert Vaux in 1858 and the
files of Laura Wood Roper, Olmsted's biographer, which contain

```

original Olmsted material and Olmsted Associates correspondence.

Comments:

- Related material may consist of a list (see Example 1), a table, or paragraphs which include `<archref>` or `<bibref>` elements (see Example 2), as well as of `<archref>` or `<bibref>` elements. See the Application Guidelines for an example of `<relatedmaterial>` which consists of a list of `<archref>` elements without additional formatting.
- Archival references (`<archref>`) may be encoded within any of these formatting elements. Since `<archref>` is a linking element, links to online finding aids or web sites for the archival resource being referenced may be easily made at the point of encoding or in the future.

Repeatable: yes (and recursive)

Order: following `<dsc>`

Revision Date: 4/15/03

3.3.8.6 Separated Material

Tag:

`<separatedmaterial>`

Description:

The `<separatedmaterial>` element is used to encode information about materials that are associated by provenance to the materials described in the finding aid but that have been physically separated, either by the repository or before they were received.

See Also:

Section 3.3.3.4, Processing Information [Go To Section](#)

Labels/heads:

Choose or formulate head appropriate to content, e.g.

- Transferred Material
- Material Cataloged Separately
- Olmsted Associate Records in Other Institutions

Encoding Analog: 544 0

Other Attributes:

n/a/

Subelements:

`<bibref>`

`<archref>`

Generic text formatting elements such as `<note>`, `<list>` and `<table>` can also be used directly under `<separatedmaterial>`. See Tag Library for full list of valid subelements.

Tagging Example 1:

Separated material at LC and elsewhere in paragraph format

```
<separatedmaterial encodinganalog="544 0">
<head>Olmsted Associates Records in Other Institutions</head>
<p>An extensive collection of additional Olmsted Associates
records, including graphic material related to this collection, is
located at the Frederick Law Olmsted National Historical Site in
Brookline, Massachusetts. Records for the period 1870-1910 also
are included in the Subject File of the <archref href="http://hdl.loc.gov/loc.mss/eadmss.ms001019" show="new"
actuate="onrequest"><origination>Frederick Law Olmsted</origination>
Papers</archref> in the Library of Congress.</p>
</separatedmaterial>
```

Display Of Tagging Example 1:

Separated material at LC and elsewhere in paragraph format

Olmsted Associates Records in Other Institutions

An extensive collection of additional Olmsted Associates records, including graphic material related to this collection, is located at the Frederick Law Olmsted National Historical Site in Brookline, Massachusetts. Records for the period 1870-1910 also are included in the Subject File of the Frederick Law Olmsted Papers in the Library of Congress.

Tagging Example 2:

Detailed description of transfers within the Library

```
<separatedmaterial encodinganalog="544 0">
<head>Transferred Material</head>
<p>Some material received with this collection has been
transferred to other divisions of the Library, where they have
been identified as part of these papers. Photographs, slides, and
drawings have been transferred to the Prints and Photographs
Division. Maps of Germany, Berlin, Dessau, Hessen, Thuringen,
central European railways, central Europe and the Berlin Crisis of
1960, and fighting fronts of World War II have been transferred to
the Geography and Map Division An audiotape of a lecture by
Dearstyne on the Bauhaus has been transferred to the Motion
Picture, Broadcasting and Recorded Sound Division. Books,
articles, and pamphlets on a variety of topics have been
transferred to the Rare Book and Special Collections Division.</p>
</separatedmaterial>
```

Display Of Tagging Example 2:

Detailed description of transfers within the Library

Transferred Material

Some material received with this collection has been transferred to other divisions of the Library, where they have been identified as part of these papers. Photographs, slides, and drawings have been

transferred to the Prints and Photographs Division. Maps of Germany, Berlin, Dessau, Hessen, Thuringen, central European railways, central Europe and the Berlin Crisis of 1960, and fighting fronts of World War II have been transferred to the Geography and Map Division. An audiotape of a lecture by Dearstyne on the Bauhaus has been transferred to the Motion Picture, Broadcasting and Recorded Sound Division. Books, articles, and pamphlets on a variety of topics have been transferred to the Rare Book and Special Collections Division.

Comments:

- Separated material may consist of paragraphs (Examples 1-2) or be in list or table format; it also may consist exclusively of `<archref>` elements which need no further formatting.
- In the past, `<processinfo>` was used to describe the transfer of material to other Library divisions. Current LC practice is to encode such information as `<separatedmaterial>`; a brief listing may still be included in the administrative `<descgrp>` (see Section 3.3.3, Administrative Information, Example 1) while a detailed listing of transferred material might be listed elsewhere with other adjunct information (see Example 2 above).

Repeatable: yes (and recursive)

Order: following `<dsc>` or within `<descgrp type="admininfo">`

Revision Date: 05/05/08

3.3.9 Other Descriptive Data

Tag:

`<odd>`

Description:

The `<odd>` element is a generic catchall element used primarily for descriptive information not fitting into any existing tags. It is particularly useful in the conversion of retrospective finding aids, where descriptive elements have been mixed (for instance, administrative information with scope note) and cannot be readily teased apart, and can also be used in other situations in which the burden of more specific tagging cannot be justified.

See Also:

Section 3.3.7.4, Expanded Description of Components [Go To Section](#)

Labels/heads:

Choose or formulate required `<head>` appropriate to content for `<odd>` at the `<archdesc>` level, e.g.

- Collection Concordance by Format
- Introduction

Encoding Analog: 500 (use at `<archdesc>` level)

Other Attributes:

Use type attributes for `<odd>` elements at the `<archdesc>` level to indicate regularly occurring structures that do not fit into any other element, e.g.

- `type="Format Concordance"`

Tagging Example 1:

Format concordance coded as table

```

<odd type="format concordance" encodinganalog="500">
<head>Collection Concordance by Format</head>
<table>
<tgroup cols="3">
<colspec colnum="1" colname="1" colwidth="20"/>
<colspec colnum="2" colname="2" colwidth="50"/>
<colspec colnum="3" colname="3" colwidth="50"/>
<thead>
<row>
<entry>Numbers</entry>
<entry>Physical Description</entry>
<entry>Location Numbers</entry>
</row>
</thead>
<tbody>
<row>
<entry>
<emph render="bold">Sound Recordings</emph>
</entry>
<entry> </entry>
<entry> </entry>
</row>
<row>
<entry>36</entry>
<entry>12-inch acetate-on-aluminum discs</entry>
<entry>AFS 3905-3940 (original field recordings)</entry>
</row>
<row>
<entry>5</entry>
<entry>10-inch DT reels</entry>
<entry>LWO 4872: reels 255-259 (preservation copies)</entry>
</row>
<row>
<entry>
<emph render="bold">Graphic Images</emph>
</entry>
<entry> </entry>
<entry> </entry>
</row>
<row>
<entry>1</entry>
<entry>black-and-white photoprint</entry>
<entry>AFC 1940/002:P1</entry>
</row>
<row>
<entry>1</entry>
<entry>copy negative</entry>
<entry>AFC 1940/002:P1-p1</entry>
</row>
</tbody>
</tgroup>
</table>
</odd>

```

Display Of Tagging Example 1:

Format concordance coded as table

| Collection Concordance by Format | | |
|----------------------------------|-----------------------------------|--|
| Numbers | Physical Description | Location Numbers |
| Sound Recordings | | |
| 36 | 12-inch acetate-on-aluminum discs | AFS 3905-3940 (original field recordings) |
| 5 | 10-inch DT reels | LWO 4872: reels 255-259 (preservation copies) |
| Graphic Images | | |
| 1 | black-and-white photoprint | AFC 1940/002:P1 |
| 1 | copy negative | AFC 1940/002:P1-p1 |

Tagging Example 2:`<odd>` for miscellaneous information at component level

```

<c03>
<did>
<unittitle>A short alleluia</unittitle>
</did>
<odd>
<p>Photocopy of holograph choral (SSAA) score with red pencil
annotations (2 copies); 2 p. Note: In caption: The Byrn Mawr
College Chorus</p>
</odd>
</c03>

```

Display Of Tagging Example 2:`<odd>` for miscellaneous information at component level

```

A short alleluia

Photocopy of holograph choral (SSAA) score with red pencil
annotations (2 copies); 2 p. Note: In caption: The Byrn Mawr
College Chorus

```

Tagging Example 3:`<odd>` for map information at component level

```

<c03 level="file">
<did>
<unittitle encodinganalog="245$a">Eastern Asia 1:1,000,000. Canton</unittitle>
</did>
<odd type="notes" encodinganalog="500">
<p>Accompanied by graphic flight line index (incomplete).</p>

```

```
<p>Sortie 35PR 4MH 29. Height 30,000 ft.</p>
</odd>
</c03>
```

Display Of Tagging Example 3:

<odd> for map information at component level

```
Eastern Asia 1:1,000,000. Canton
Notes: Accompanied by graphic flight line index (incomplete).
Sortie 35PR 4MH 29. Height 30,000 ft.
```

Comments:

- Use <odd> for descriptive elements which fit no existing EAD tag, such as concordances by format compiled by the American Folklife Center and cartographic details described by Geography and Map Division. Set the TYPE attribute to indicate the nature of the content and indicate the appropriate ENCODINGANALOG (usually 500). See Examples 1 and 3.
- Scattered miscellaneous descriptive data within components in the container list may be encoded as <odd> when the burden of more specific tagging for this data cannot be justified. See Example 2.
- When encoding retrospective finding aids, encoders are encouraged to work with finding aid authors to separate collection-level information into the more specific tags rather than encoding mixed descriptive data as <odd>. Encoding data with more specific tags enables more uniformity in the searching and display of finding aids in the LC and other databases. Finding aid creators are encouraged to avoid the unnecessary commingling of descriptive elements.

Repeatable: yes (and recursive)

Revision Date: 05/09/03