



# TS EAS

This meeting is being recorded!

Wednesday 26th: 9pm PST / 10pm MST / 11pm CST

Thursday 27th: 0am EST / 5am UTC / 6am CET / 7am

EET, CAT, SAST / 10.30am IST / 1pm CST / 4pm AEDT



**TS-EAS 2024-2025**





# Notes

Yogita

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# Co-Chairs

Karin and Mary

# Timeline

Co-chairs

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# Revision cycles

- Revision cycles
  - Step one: alignment of our standards: EAC-CPF, EAC-F and EAD
    - DONE! Coordinate teams and timelines
  - Step two: hand over package to Standards -> Council
  - Step three: Prepare request for major revision looking into RiC
  - Step four: Revision with alignment according to our assessment of RiC



# Timeline info

- Google Sheets Timelines demo
  - Example 1: TS EAS Timeline
  - Example 2: TS EAS Functions Timeline
  - Summary; Request for feedback
- I am happy to make this timeline visualization for other subteams. Please write an email to Yogita and include:
  - Link to your subteam's latest timeline
  - Contact info. of a subteam member in case I have any questions

# Memberships

Co-chairs







# Memberships

- Update on membership submission to SAA
  - Sent in for 4 re-appointments and 2 new appointments on January 24, 2024
  - There were no slots available for new international members
  - Didn't get many applicants from the U.S.
  - No hard date as to when we may hear back from SAA Appointments committee
    - Start date of term is 1 September 2025

# Annual meeting 2025

Co-chairs





# SAA annual meeting 2025

- Funding request for our meeting at the Annual meeting has been sent by Standards to Council 17th of October 2024
  - Was not on the agenda in November 2024 neither on the agenda in February 2025
  - In December 2024, co-chairs had discussion with our council liaison Lydia Tang and SAA President Tomaro Taylor
  - SAA Chief Executive Officer Jacqueline Price Osafo will give some sort of response by end of January
    - The response: Have not been received one as of 21st of February

SAA annual meeting Sunday 24 -  
Wednesday 27 August, Anaheim, CA



# TS EAS meeting 2025

- We need to decide our next steps
  - Online?
    - We end up with the timezone questions
    - Using US Eastern as the time to create the schedule for the meeting is the co-chairs' suggestion
  - F2F? (We plan for online attendance to be possible)
    - Where?
      - Goal should be to make it easy for people to get there
        - Co-chairs' suggestion is the East coast
        - A free room/rooms equipped with all needed for a F2F and Hybrid setting
        - Moderate cost for hotel
        - Easy to get from hotel to meeting room
        - Easy to get to the location (airport/train station/greyhound bus terminal)
  - Dates?
    - July (will have impact on the timeline)
    - August

We need to make a decision! A form will be sent out with a short turnaround so all can give their opinion!



# Invitations

- Co-chairs are working on getting SAA to send invitations
  - Is invitations from the co-chairs enough?
    - Part of the survey

Invitations will be sent out no matter the meetings form!

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# Reports and status updates

Team leads and liaisons

# Lara: Standards Committee

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# Standards Committee

- Dan has been working tirelessly on nominations issues. See mostly resolved.
- Standards Committee is in the process of creating a survey to send out to the archival community asking for input on the use of existing standards and on wishes for future standards work.
- In the SAA strategic plan, SAA leadership asked the SAA Standards Committee to “identify the need for new standards, guidelines, and best practices and lead or participate in their development.”
- The survey will help the Standards Committee focus its energies and efforts to ensure that the creation and maintenance of archival standards continues to serve the evolving needs of archival workers and institutions.
- Should be distributed in the next few weeks.



# Janaya: SAA EAS Section

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## EAS Section

No news

**Karin: EAC-F**

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# Encoded Archival Context - Functions

- Consists of 4 members, US-based & international
- Meets biweekly via Zoom, Mondays, 3:00 pm CET
- Timeline ready, aim ready with all texts by June 9th
  - Huge aid from EAC-CPF team and Ailie since we share many elements and attributes!
- Notes:  
<https://github.com/SAA-SDT/TS-EAS-subteam-notes/tree/master/functions-subteam/meeting-minutes>

~~Marie~~ Karin: EAC-CPF

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## EAC-CPF subteam

- Encoded Archival Context - Corporate Bodies, Persons, Families
- Responsible for schema (files) & documentation
- Consists of 6 members, US-based & international
- Meets monthly via Zoom  
1st Thursday, 11:00am/12:00pm UTC  
(i.e. 7:00am EDT/EST, 10:00pm AEST/11:00pm AEDT)



# EAC-CPF subteam

## Team “departures”

- Kerstin to focus on EAD team–thank you!
- Iris to focus on Tag Library/Best Practices Task Force–thank you!



# EAC-CPF subteam

## Team timeline

- The EAC-CPF-specific timeline currently extends only until the 2025 meeting.
- Our main task is to make any changes required for EAC-CPF / EAD4 alignment.
- After the EAD4 comments periods, we will have more tasks.

## Documentation

- <https://github.com/SAA-SDT/TS-EAS-subteam-notes/tree/master/eaccpf-subteam>
- <https://eac.staatsbibliothek-berlin.de/>



**Kerstin: EAD**

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# The team

- Responsible for defining the EAS standard in alignment with the originating ICA standard, which includes
  - Conceptually defining the elements and attributes found in the EAS standard (current focus: finalising EAD 4.0)
  - Creating the Tag Library content and providing input to the Schema Team
  - Ensuring alignment with Functions and EAC-CPF
- Consists of 10 active members (more international than US-based)
  - **Huge thank you to Marie and Mark**, who will be concentrating on their own team lead assignments following the re-organisation
- Monthly meetings
  - Currently: **fourth** Friday each month; usually 1.5 hours, 1pm UTC
- **Always open for new members with fresh eyes and new perspectives**



# What happened since October

- Four monthly meetings to continue discussing the remaining comments received during spring and early summer 2024
  - Add all variations of ISO standards for country and language codes in @...Encoding attributes within <control>; change Schematron to check with regular expressions rather than specific value lists against these external standards
  - Remove <physLoc> and use <place> instead
  - Rename <materialSpec> to <otherIdentificationData>
    - Seems to currently be used as a “catch all” element; having a generic element eases the transformation route
    - Introduce a new element <recordTypeSpecificationStatement> next to <physicalOrTechnicalRequirements>, allowing for <objectXMLWrap> next to the narrative elements for more detailed encoding of information specific to certain types of records



# What happened since October

- Extend the model for `<formAvailable>` to also group together all individual aspects of archival description that relate to a specific instantiation rather than the intellectual entity of an archival record
  - Allow `<extent>` also in `<formAvailable>` and move `<dimensions>` and `<physFacet>` from `<identificationData>` to `<formAvailable>` only; `<genreForm>` remains in `<identificationData>` only
  - Add date elements, `<role>`, and a new `<formAvailableId>` to `<formAvailable>`, as well as a new `@formAvailableType`
  - Allow the following elements also in `<formAvailable>` (next to `<c>/<archDesc>`): `<accessConditions>`, `<accruals>`, `<arrangement>`, `<custodHist>`, `<processInfo>`, `<separatedMaterial>`, `<sourceOfAcquisition>`, `<useConditions>`
  - Move `<physicalOrTechnicalRequirements>` to only being in `<formAvailable>`
  - Use `<descriptiveNote>` instead of `<abstract>`, `<p>`, `<formattingExtension>`



## Urgent: we need a <container>-based example

- Part of the suggested changes for <formAvailable> is moving <container> from <identificationData> to <formAvailable> only
- <container> is mainly used in the US and only very rarely in other parts of the world, hence we are currently missing an example that would allow us to evaluate the potential impact of such a change
- **If you have an example from your own organisation, please share with Kerstin ideally by 28 February**



# What happened since October

- Postponed suggestions:
  - Issues relating to further alignments with RiC have been postponed to the next joint revision of the EAS with regard to their relation to RiC
- Rejected suggestions:
  - We won't add `<legalStatuses>` in EAD as `<legalStatus>` is not considered an entity element in this context
  - We won't allow `<span>` to be nested in `<span>`, following the general decision to remove nesting and the focus of the EAS on encoding information rather than encoding how information is formatted for display



# What's next

- A few pending decisions
- Finalisation of schema and Tag Library for second call for comments by end of March
- Call for comments open between 7 April and 9 May
- Review and decisions upon receipt of further comments
- See complete timeline for all details

# Mark: Schema

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# Schemas Subteam

- 5 team members, US-based & International
  - Welcome to Eric Sonnenberg who joined this calendar year
  - Many thanks (and future testing requests!) due to Kerstin Arnold and Martin Critelli who rotated off this year in order to focus on EAD4
- Meet every third Friday of the month at 10 a.m. EST via Zoom
- Finalized new timeline to ensure that all 3 schemas (EAD4, EAC-CPF, EAF) will be ready to launch this year
  - Extra meetings scheduled in March and June to create new schema releases for testing
- Internal meeting notes in a Google Drive
- Everything else on GitHub at:
  - <https://github.com/SAA-SDT/eas-schemas/tree/development>
  - <https://github.com/SAA-SDT/eas-schematrons/tree/development>
  - <https://github.com/SAA-SDT/eas-transformations/tree/development>

# Task Force: Tag Library/Best Practices

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# TL & BPG: User-friendly documentation

- Home base: GitHub
  - [Tag Library](#)
    - Defines the use and constraints of elements and attributes within an EAS standard
  - [Best Practice Guide](#)
    - Living resource providing helpful explanations, guidelines and examples for encoding descriptions across EAS schemas
    - Community-driven practices representing the best of all of us!
      - Submit examples: <https://github.com/SAA-SDT/EAS-Best-Practices/issues>
      - Want to contribute? Email Iris!
- Task Force Team:
  - Ailie Smith, University of Melbourne
  - Alex Duryee, Harvard University
  - Iris Lee, AMNH Library

# Cory: Outreach and Communications

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## Recent activity

- Meeting recording from SAA annual meeting posted
- Ongoing coordination for upcoming Collection Management Section Spring webinar
- Available to assist other teams in revision process

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**Full committee  
discussion points or updates**



# Survey will be sent afterwards!

- A survey will be sent afterwards to TS EAS for decision making on the presented agenda items.

# Shared value lists and their suggested values

Prepared by the EAD team

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# A quick reminder

- What's the idea?
  - Previous versions of the EAS included predefined value lists for certain attributes directly in the schemas, e.g. @level in EAD
  - We want to change this towards a vocabulary-based and potentially linked data approach
  - This will enable the use of other lists instead of the ones predefined by TS-EAS
    - Those other lists should then be referenced in <conventionDeclaration> same as any other standards or rules followed during the creation/edition of the archival descriptions



# How it works

- The mechanism for doing this are optional @...Encoding attributes within <control>
  - These come with two possible values: “EASList” or “other...Encoding”
  - When someone intends to use the related attributes within the description parts of the EAS, they should specify whether they use the EAS list of values or not
  - EAS lists can be validated against via the general Schematron, other lists would need to be validated by the users in their own set-ups
- Note 1: this is different from the @...Encoding attributes for ISO standards
- Note 2: the majority of attributes with value lists are @...Type attributes



## Several EAS

addressLineType  
audience  
contactLineType  
detailLevel  
maintenanceEventType  
maintenanceStatus  
publicationStatus  
status  
**agentType** (review)  
**targetType** (review)  
**relationType** (review)  
**placeType** (new)  
**functionType** (new)  
legalStatusType (*to be decided*)

## EAD only

coverage  
descriptionOfComponents  
Type  
**extentType** (renamed)  
**formAvailableType** (new)  
level  
**unitDateType** (review)  
subjectType

## EAC-CPF only

identityType  
demographicDescription  
Type (*to be decided*)  
languageUsedType (*to be decided*)  
localDescriptionType (*to be decided*)  
mandateType (*to be decided*)  
occupationType (*to be decided*)

Note: <entityType>  
remains an element  
(*needs confirmation*)

## EAC-F only

functionStatus (*maybe?*)

Note:  
targetRelationship with  
targetRelationshipType  
was replaced by  
targetType (*needs review*)

Note: <functionType> is  
defined as an element  
here (*needs review*)



# Decisions needed

- Confirmation of values to be included and finalisation of description for each value
  - Shared attributes need input from all standard teams in this context
  - See <https://github.com/SAA-SDT/EAS-Best-Practices/tree/main/docs/value-lists> and <https://docs.google.com/spreadsheets/d/1iFrBrSOapUGV9WYnfiwnWqnU3kFHeyUNRiMw3CrkTA/edit?gid=0#gid=0>
- For EAC-CPF
  - Whether the remaining singular elements follow the same approach as <function> and <place> - can be decided when alignment for EAC-CPF is discussed
  - Solid explanation as to why <entityType> remains an element (along with <otherEntityType>) - can be decided when alignment for EAC-CPF is discussed



# Decisions needed

- For EAC-F
  - Following up from the previous point, solid explanation along the same lines for <functionType>; if kept, this also requires a revision of the element's name - ***needs a decision now*** as it impacts EAD 4.0 draft
  - Whether @functionStatus could be used with an EAS list - can be decided when alignment for EAC-F is discussed
  - Confirmation regarding <target Relation> and @targetRelationType - ***needs a decision now*** as it impacts EAD 4.0 draft

# The attribute `localType`, its name and usage

Prepared by the EAD team

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# A quick reminder

- Current Tag Libraries (EAD3 and EAC-CPF 2.0)
  - Narrows the semantics of an element, or provides semantics for elements that are primarily structural or semantically weak.
  - Value may be from a local or generally used external vocabulary; may be any string, though, it is recommended that the value be a URI
  - Local conventions or controlled vocabularies used in @localType may be declared in <localTypeDeclaration> within <control>
- The issue
  - The interpretation of “local” → **possible alternative:** “other”, “alternative”
  - The interpretation of “type” → **possible alternative:** “descriptor”
  - The usage as a catch-all attribute



# Application in the context of other changes

- Elements with context-specific @...Type attributes
  - Use values from the relevant EAS list; other - local - lists can be defined in the related @...Encoding attribute of <control> and by using <conventionDeclaration>
  - This fulfils the same requirements as @localType is meant to address
  - No need for @localType with those elements anymore





# Application in the context of other changes

- Elements that allow for the three (new) vocabulary attributes
  - Ideally aimed at external vocabularies, but can also be locally managed vocabularies
  - Technically, such locally managed vocabulary would not be required to be accessible online (use of @vocabularySource instead of @vocabularySourceURI; use of @valueURI a (local) alphanumeric identifier)
  - As such, the vocabulary attributes could be used for local types
  - However: vocabulary attributes mean to represent an element's content, not type the element
  - Question: do we consider that linking to vocabularies helps an element's potential semantic weakness, i.e. if vocabulary attributes are used, @localType is not necessary anymore?
- All elements now allow for the addition of attributes from other namespaces
  - Question: Could this provide an alternative solution instead of @localType?



## Decisions needed

- Suggestion:
  - Elements that have a context-specific type attribute should NOT have @localType
    - Consider renaming @unitDateType to @dateType and use it more extensively with the general date elements (<date>, <dateRange>, <dateSet>, <fromDate>, <toDate>)
  - Plural wrapper elements (that cannot be repeated) should NOT have @localType
    - Counter argument: in aggregation contexts, differently typed plural elements might still be useful/valuable
  - Entity elements and singular elements are considered semantically strong enough that they do NOT need @localType
    - Possible exceptions: <legalStatus> (shared), <genreForm>, <title> (all EAD only), <demographicDescription>, <localDescription> (both EAC-CPF only)



## Decisions needed

- Suggestion:
  - Name elements should KEEP @localType, as they could benefit from semantic narrowing
  - Any catch-all element including the term “other” in its name should KEEP @localType, as they would be considered semantically weak
    - Possible exceptions: <otherEntityType> (EAC-CPF), <otherFunction> (EAC-F) as they are conceptually meant to cater for other, local types already
  - Elements meant to encode narrative information should KEEP @localType, as they are primarily structural
  - This only leaves a few elements that would not fall into any of the above categories:
    - <address>, <contact>, <identityId>, <part>, <reference>, <span> (shared); <provenanceEvent>, <relationship> (new and shared)
    - <archDesc>, <container>, <dimensions>, <physFacet>, <unitId>, <unitTitle> (EAD only)
    - <componentEntry>, <existDates> (EAC-CPF only)
    - <classification>, <legislation> (EAC-F only)

# Overview and suggested actions (all details)

Elements with @localType in EAD 4.0 draft 0.1	Shared?	Has vocabulary attributes	Notes	Suggestion re @localType	Comments
abstract	Yes	No	Narrative element, primarily structural	Keep	
accessConditions	No	Yes	Narrative element, primarily structural	Keep	
accruals	No	No	Narrative element, primarily structural	Keep	
address	Yes	No		Keep	
agent	Yes	Yes	Does not have @localType in EAC-CPF; @localType should be removed, as local types can be covered by using @agentType / @agentTypeEncoding with "otherAgentTypeEncoding"	Remove	
agentName	Not yet	Irrelevant	Will be replaced by <label>	Not applicable	
agentRole	Not yet	Irrelevant	Will be replaced by <role>; in this context, @localType is removed to help the distinction between roles and types; in EAD3 and EAD 2002, role was captured via an attribute, so local typing has never been a requirement	Not applicable	
agents	No	No	Plural wrapper element; cannot be repeated; @localType should be removed	Remove	
agentType	Not yet	Irrelevant	Will become an attribute	Not applicable	
appraisal	No	No	Narrative element, primarily structural	Keep	
archDesc	No	Yes		Keep	
arrangement	No	No	Narrative element, primarily structural	Keep	
biogHist	Yes	No	Narrative element, primarily structural	Keep	
contact	Yes	No		Keep	

**Addition of a(n) shared  
attribute/element in control  
and/or in the description for  
stating use of AI**

Prepared by the co-chairs

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# Statement of use of AI and reparative updates

- It is becoming apparent that more data is being generated by AI. The data can be the document itself, the description of the content, or both.
- Concurrently, an increasing number of cultural heritage professionals across different domains are engaging in reparative description. Currently there is no element or suite of elements to document this effort.
- How do we best communicate these to our user community?
  - Are we at a point that we need to be transparent about the use of AI in description?
  - Should it be possible to include a statement for the whole document and to be able to give information in all elements?
  - Are we at a point that we need to be more transparent about reparative efforts?
  - If new efforts are developed in the future, is there a holistic way to capture these efforts without creating new elements?
- To be discussed is if these different types of statements need to be separated or if they can be in the same element



# Suggestion to be used for the whole description

- In control addition of an element creationUpdateStatements containing creationUpdateStatement with agent, date(s) and p's which can contain text where a textual description can be given regarding the use of AI in creation or if reparative updates of the EAD/EAC-CPF/EAC-F have been made concerning the whole document
  - Suggestion is that the name of the element cover both AI creation/updates and reparative updates (and other coming needs) for the whole document
- Example on next page
- When doing an update a maintenance event also needs to be created



# Example

```
<creationUpdateStatements>
  <creationUpdateStatement>
    <date>Date of the statement</date>
    <agent>Agent writing the statement</agent>
    <p>This document was created using the AI "AIMaster"</p>
  </creationUpdateStatement>
  <creationUpdateStatement>
    <date>Date of the statement</date>
    <agent>Agent writing the statement</agent>
    <p>This document has undergone reparative updates</p>
  </creationUpdateStatement>
</creationUpdateStatements>
```





## Suggestion to be used for all elements

- In control addition of an element `creationUpdateStatementDeclaration` which contains same elements as the other declaration elements. The important part is that it can contain the text where the textual description can be given regarding the use of AI in creation or updates or if reparative updates of the EAD/EAC-CPF/EAC-F have been made
  - Having a declaration element created for each of these creations or updates means that the statement can be thoroughly described and given an ID which then can be referenced in the description in the elements where AI has been used or reparative updates have been made
  - In the common attributes for all elements an addition of the optional attribute `creationUpdateStatementReference` with which a reference is made to the ID used for the relevant `creationUpdateStatementDeclaration` following the attributes with the same use
- This element and attribute set follows all the other declarations. It has no “controlling” attribute.
- When doing an update a maintenance event also needs to be created

**Control to be the same in all  
the EAS standards with  
exception of the “value list”  
control attributes**

Prepared by the co-chairs

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# Decision needed

- Control will be the same in all the EAS standards following the shared attributes and elements principle
  - Currently needs removal of <localControl> and <representation> from EAC-CPF and EAC-F
- However, there will be one exception: the value list controlling attributes will differ (as not all attributes using a value list are available in all EAS (e.g. @levelEncoding for EAD or @identityTypeEncoding for EAC-CPF))
- We need to have a decision noted for this exception of the rule
- Needs to be present in our design principles

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# Any other business items?

All

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# Thank you!

TS-EAS meets:

- May
- SAA Annual meeting
- October
- February (aim: time better for members in the timezones with more than +5 from GMT)