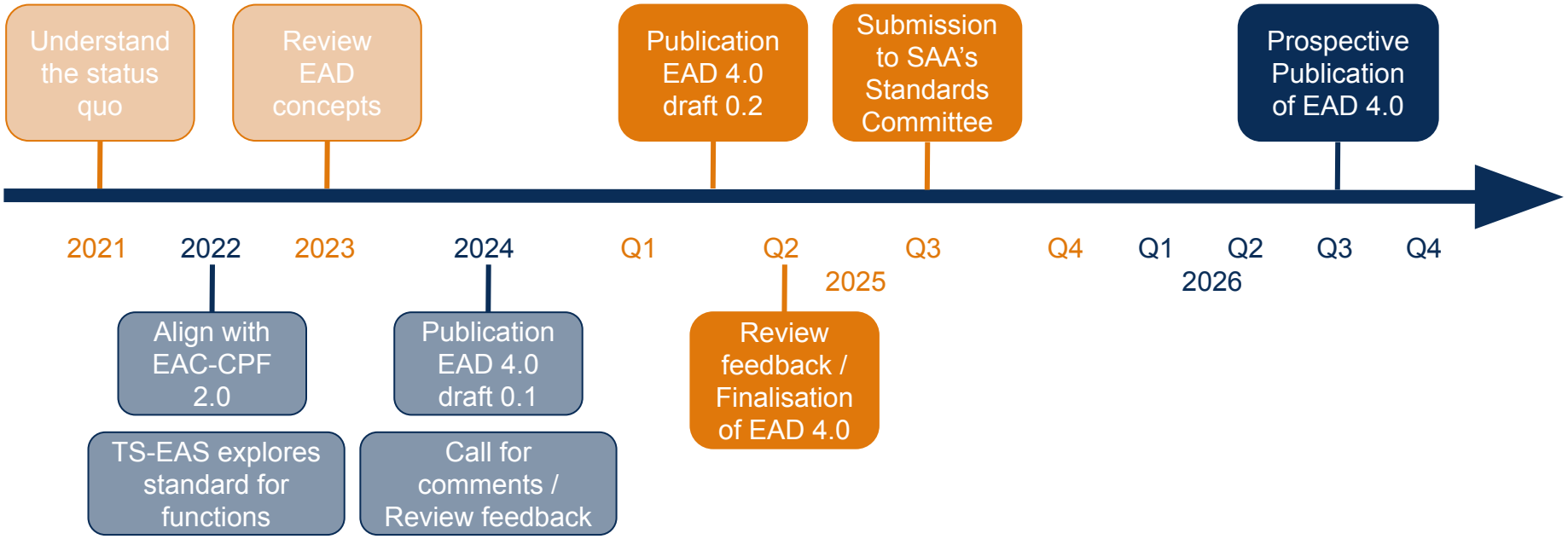
SOCIETY OF American Archivists

Technical Subcommittee on Encoded Archival Standards

Be part of the major revision of the Encoded Archival Description (EAD)

Final Call for Comments, 7 April to 9 May 2025

Updated timeline of the revision



Benefits of EAD 4.0

Benefits of EAD 4.0

Developed by and for cultural heritage professionals around the world.

1 Interoperable

Aligns EAD with EAC-CPF 2.0.

Enhances interoperability across standards.

Allows greater data reuse.

2 Sustainable

Implements the latest archival concepts and models.

Improves linking between descriptive elements.

Supports richer relations between records and agents.

3 Exchangeable

Focuses on EAD as a data encoding and exchange standard.

Enhances linked data support.

Supports relations comprehensively.

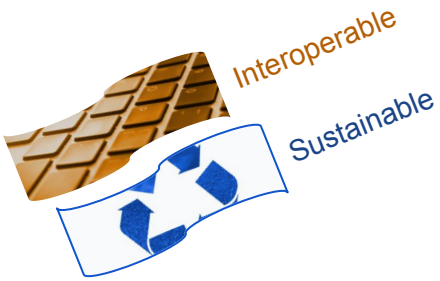
4 Extensible

Streamlines specific elements into reusable ones.

Enables reuse of external formatting schemas.

Limits mixed content to three built-in elements.

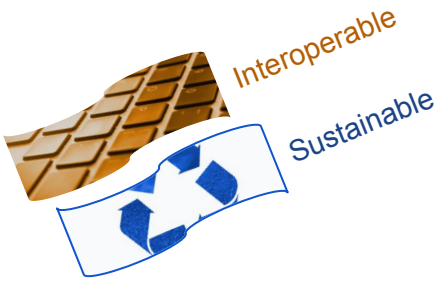
The main differences between draft 0.1 and 0.2



<formAvailable>

Archival records and their instantiations

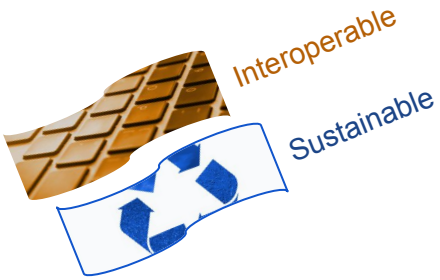
- The basic content model of <formAvailable> is now closer to the other entity elements (e.g. <agent>) than to the narrative elements (e.g. <scopeContent>)
- It includes <label>, <role>, <placeName>, the date elements, <descriptiveNote> and a @formAvailableType attribute



<formAvailable>

Archival records and their instantiations

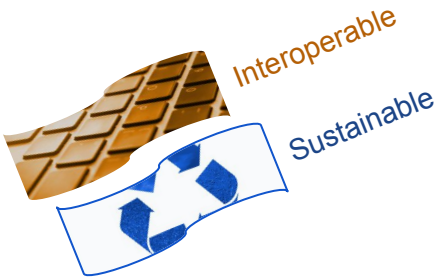
- <formAvailable> retains the full <relations> element to emphasise its importance in the relation of archival records and their instantiations
- This is different from the other entity elements which include a simpler <relationship> element



<formAvailable>

Archival records and their instantiations

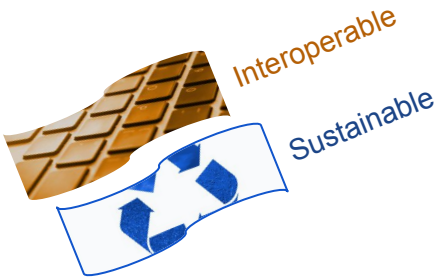
- Representing all and any instantiations of an archival record, <formAvailable> now includes all elements that might differ from one instantiation to another (e.g. analogue or digital, but also .jpg or .tiff and high resolution image or thumbnail)
- First and foremost, this includes elements of physical description (i.e. <dimensions>, <extent>, <physFacet>, <physicalOrTechnical Requirements>)
- Apart from <extent>, these are now only available in <formAvailable>



<formAvailable>

Archival records and their instantiations

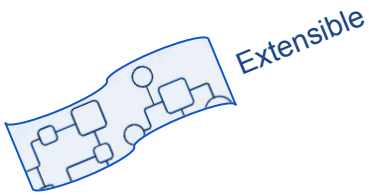
- Additionally, <formAvailable> now includes elements of identification (<container>, <formAvailableId>) and narrative elements (<accessConditions>, <accruals>, <arrangement>, <custodHist>, <processInfo>, <separatedMaterial>, <sourceOfAcquisition>, <useConditions>)
- These also remain available in <archDesc> and <c>



<formAvailable>

Archival records and their instantiations

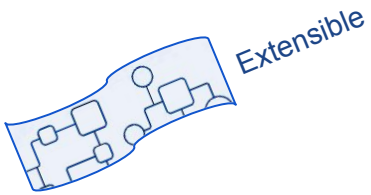
- With this, anyone starting fresh with EAD 4.0 can use <formAvailable> to more completely encode information about different instantiations and is now closer to the relevant entity in Records in Contexts
- Anyone coming from a previous version of EAD can still encode most information in <archDesc> and the <c> elements, while using the <relations> element of <formAvailable> for interoperability
- This approach can then be extended step by step to the full encoding of instantiations



Roles and types

Alignment across
all entity elements

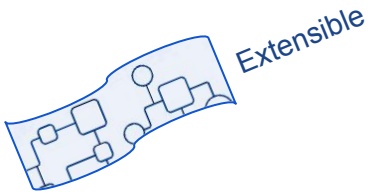
- The encoding of roles and types of related entities (agents, functions, places, subjects, plus instantiations via <formAvailable>) has now been aligned
- To make a clearer distinction between the type of entity and the role that this entity has towards the archival records being described, types are now encoded in context-specific attributes, while roles are encoded in elements



Roles and types

Alignment across
all entity elements

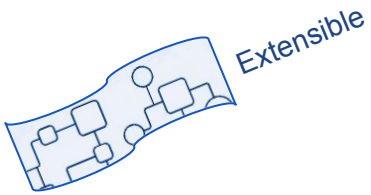
- As a result of this, <agent>, <function>, <place>, and <subject> now all include a generic <role> element
- Context-specific type attributes were added (@agentType, @functionType, @placeType, and @subjectType)
- The values of these can be managed in <control>, which is why @localType has been removed



Roles and types

Alignment across
all entity elements

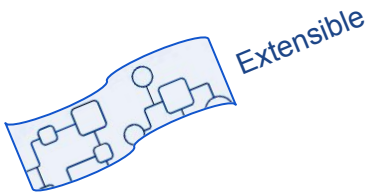
- Additionally, the names or titles of these related entities is now encoded in a generic <label> element
- Furthermore, the element to encode the relation between the related entity and the archival records described has been renamed to <relationship> in line with the general changes around roles and types



Roles and types

Alignment across
all entity elements

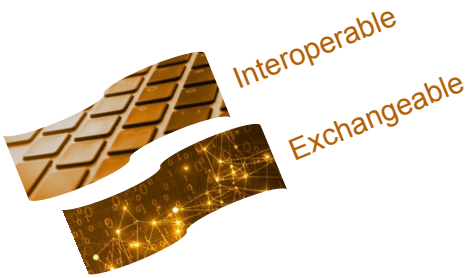
- These changes also have been applied to the singular <relation> element
- This now also includes the generic <label> and <role> elements, while @targetType and @relationType are now encoded using attributes
- Additionally, <relation> now also only uses the simple <placeName> element for any geographic characterisation



Roles and types

Alignment across
all entity elements

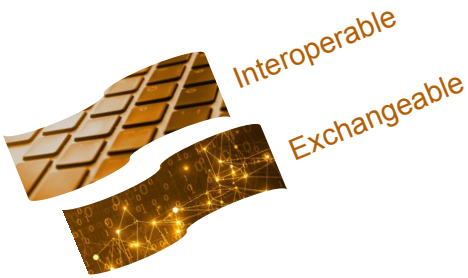
- A final change in line with this revision is the addition of new attributes (@referredEntityType and @referredEntityRelationship) to <referringString>
- As <referringString> remains an element to be used in mixed content scenarios, however, no further sub-elements or attributes were added



Encoding of physical description and dates

Alignment and focus on one way of encoding

- The variety of <physDesc>, <physDescStructured>, and <physDesc> has been removed
- Instead, the former sub-elements for encoding physical description are now reinstated (i.e. <extent>, <dimensions>, <genreForm>, and <physFacet>)
- In this context, the encoding of amounts and units of measurement in <extent> and <dimensions> has been aligned to using <quantity> and the renamed <unitOfMeasurement>



Encoding of physical description and dates

Alignment and focus on one way of encoding

- Similarly, the variety of <unitDate> and <unitDateStructured> has been removed
- There is now only one element to encode the date of creation of the archival record, which is simply named <unitDate>
- This includes the triad of <date>, <dateRange>, and <dateSet> and a new element called <textualDate> for encoding dates that cannot, or at least not easily, be expressed in a standardised way

Other changes in draft 0.2

Renamed, replaced and new elements

- <otherFindAid> is now more generally named <otherDescription> to encompass the variety of potentially existing other descriptions of the same archival records
- <materialSpec> has been found to be too imprecise respectively too generically used as a catch-all element
- It is hence replaced by a generic <otherIdentificationData> element to capture any information that cannot be encoded in other elements within <identificationData>

Renamed, replaced and new elements

- Additionally, a new <recordTypeSpecificStatement> is introduced which allows for encoding more specific details depending on the record type
- Next to narrative sub-elements, <recordTypeSpecificStatement> also includes <objectXMLWrap> to enable the integration of information specific to certain types of records, but encoded in other standard formats

Renamed, replaced and new elements

- Similarly, <objectXMLWrap> has been enabled as an optional sub-element of <descriptiveNote>
- <physLoc> has been removed in favor of using the new <place> element
- <descriptiveNote> is now used instead of <identificationDataNote> which aligns with the <identity> element in EAC-CPF and the future EAC-F

Changes in attributes

- @localType and @localTypeDeclarationReference have been enabled in <reference>
- @parent has been removed from <container> in favor of the generic @target attribute
- Instead of a TS-EAS version of @base, @xml:base is recommended to be used in <ead>, <control>, <archDesc>, <sources>, <relations> and the numbered and unnumbered <c> elements if a base URI is to be defined

Changes in attributes

- The changes around encoding types have resulted in the addition of further @...TypeEncoding attributes in <control>
- These will point to EAS lists with values for types of agents, extents, functions, instantiations, places, referred entities in mixed content contexts, relations, subjects, and target entities
- The list of ISO standards that can be referred to for encoding countries and languages has been extended

Where to find more information

Find all information on the SAA website

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Call for Comments: Revision of Encoded Archival Description

Roster

The Technical Subcommittee on Encoded Archival Standards (TS-EAS) is pleased to release Encoded Archival Description (EAD) 4.0, a draft updated version of the standard for public review and comment. To ensure the greatest possible input from EAD users around the world, the subcommittee is calling for comments on the proposed changes to the current version, EAD3 (deprecated), schema and tag library, and the previous version, EAD 2002, DTD, schema, and tag library. The deadline for comments on the change proposals is Sunday, 28 July 2024. An introductory webinar on how to contribute to this call for comments is scheduled for 24 April (twice with the same content to accommodate different time zones around the world) at 10am UTC (open for registration) and 4pm UTC (open for registration). We are looking forward to seeing you there!

Technical Subcommittee on Encoded Archival Standards (TS-EAS)

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TS-EAS AT WORK

GitHub workspace
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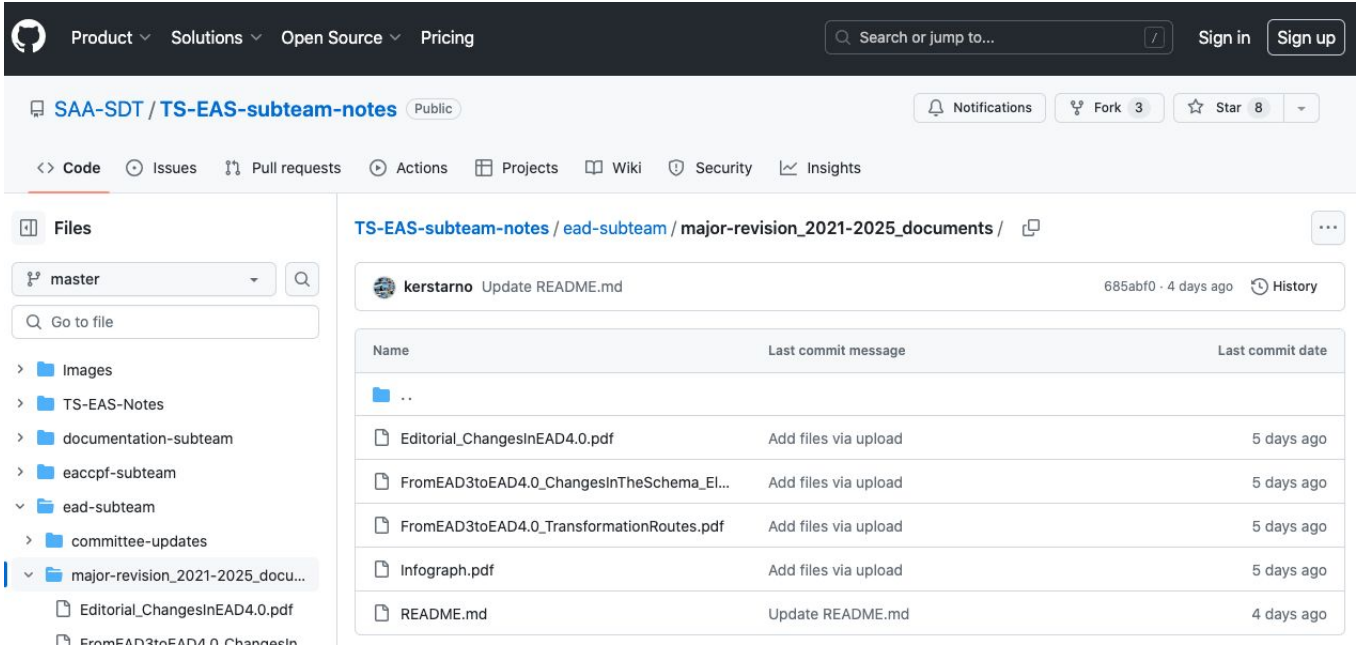
Submit an EAD or EAC-CPF issue or feature request via our webform
Meetings

TS-EAS STANDARDS

Official EAD Website
Official EAC-CPF Website

https://www2.archivists.org/groups/technical-subcommittee-on-encoded-archival-standards-ts-eas/call-for-comments-revision-of-e-0

Find all information on the TS-EAS GitHub page



https://github.com/SAA-SDT/TS-EAS-subteam-notes/tree/master/ead-subteam/major-revision_2021-2025_documents