



**ARCHIVES • RECORDS 2025**  
**Society of American Archivists**  
**89th Annual Meeting & Expo**

## Update from TS-EAS Technical Subcommittee – Encoded Archival Standards



**Technical Subcommittee on  
Encoded Archival Standards**





# TS-EAS

This meeting is being recorded!

Thursday 14th of August



# Agenda for this meeting

- Short recap: TS-EAS
- TS-EAS annual meeting 2025
  - Day 1
  - Day 2
  - Day 3
  - Day 4
- Q&A
- Closing of the TS-EAS annual meeting and this session

---

# Short recap: Introduction to TS-EAS

Mary and Karin



# Introduction to TS-EAS

- By-laws  
(<https://www2.archivists.org/governance/handbook/section7/groups/Standards/TS-EAS>)
- Consists of up to 25 members
  - Both SAA and international members
- + two co-chairs (SAA and international)
- + early career member, liaisons and ex-officios

If you want to join TS-EAS as an SAA member or as an international member, keep an eye out for the call being sent out later this fall by SAA!

SYDARK/VERA.

Kerstin Arnold (Archives Portal Europe)

Carmen Friedrichberg, Sydarkerivera (she, her, hers, and herself)

Sergio Mueller

Dan Michelson

Yipanti (Dial) Kyta

Marie Elia

Kolbe Rasmick

Yogita Sharma

Cory Nimer

Mary Samouelian

Yidia Tang (she/her)

Yanlin Li

Andrew James

Alicia Smith

Ylira Michalis (she/her)

Alexander Duryee (he/him)

Elizabeth Russey Rolke (she/her)

Venkat

Eric Sonnenberg

Jiankai Kizile

Mark Custer

Martin Critelli

Iris Lee

Otshidile Patience Tshagatsang

Glenn

# TS-EAS 2024-2025





## Introduction to TS-EAS cont'd

- Considers and implements requests from the community following the rolling revision cycle for minor revisions (annually) of the EAS standards
- Leads the major revision of EAS standards following SAA's and the Standards Committee recommendation for general review every 5 years





# Introduction to TS-EAS cont'd

- Four committee-wide meetings per year
- Multiple subteams
  - <https://github.com/SAA-SDT/TS-EAS-subteam-notes/wiki/Sub-Teams-and-Charges#current-standing-sub-teams>



# EAC-CPF subteam

- Encoded Archival Context - Corporate Bodies, Persons, Families
- Cares about
  - Schema (files)
  - Documentation
- Consists of 6 members
  - Both US-based and international members
- Meets monthly via Zoom, first Thursday, 11:00am/12:00pm UTC  
(i.e. 7am New York, 1pm Stockholm, 7pm Beijing, 9pm Melbourne)
- Documentation
  - <https://github.com/SAA-SDT/TS-EAS-subteam-notes/tree/master/eaccpf-subteam>
  - <https://eac.staatsbibliothek-berlin.de/>



## EAC-F subteam

- Encoded Archival Context - Functions
- Cares about
  - Schema (files)
  - Documentation
- Consists of 4 members
  - Both US-based and international members



# EAD subteam

- Encoded Archival Description
- Cares about
  - Schema (files)
  - Documentation
- Consists of 10 members
  - Mostly international members with 2 US-based members
- Notes
  - <https://github.com/SAA-SDT/TS-EAS-subteam-notes/tree/master/ead-subteam>



# Schema subteam

- Cares about
  - Schemas
    - Addressing requests from allied subgroups, i.e. EAC-CPF, Functions, and EAD teams
    - Responding to schema-related bug reports
    - Creating new schemas as required
  - Documentation
    - Creating, maintaining, and updating Tag Libraries and Best Practices Guide (Task Force)
  - Maintaining and revising any (technical) documentation created during the course of its work (e.g., guidelines on design patterns used in the schema-authoring process)
- Consists of 6 members
  - Mostly US-based with 2 international members



# Outreach subteam

- Cares about
  - Promoting broader awareness of TS-EAS' activities and its work plans, across a range of key stakeholders and audiences
  - Liaising with the EAS Section and Collection Management Section leadership on communications, education, and outreach plans
  - <https://bit.ly/ts-eas-oc>
- Team membership
  - Smaller group this year, with three appointed members
  - Also includes liaisons from the affiliated SAA sections



## Introduction to TS-EAS cont'd

- Handbook (<https://github.com/SAA-SDT/TS-EAS-subteam-notes/wiki/Meeting-Policies-and-Procedures>)
- Our webpage (<https://www2.archivists.org/groups/technical-subcommittee-on-encoded-archival-standards-ts-eas>)



## Links to web pages and email list

- Handbook: <https://github.com/SAA-SDT/TS-EAS-subteam-notes/wiki/Meeting-Policies-and-Procedures>
- Our SAA webpage: <https://www2.archivists.org/groups/technical-subcommittee-on-encoded-archival-standards-ts-eas>
- EAC-CPF Official Home Page: <http://eac.staatsbibliothek-berlin.de/>
- EAD Official Home Page: <http://www.loc.gov/ead/>
- EAS (EAD/EAC-CPF) Listserv (electronic discussion list)  
<https://listserv.loc.gov/cgi-bin/wa?A0=EAD>
- EAS (EAD/EAC-CPF) List Subscription Settings  
<http://listserv.loc.gov/cgi-bin/wa?SUBED1=ead&A=1>



---

# TS-EAS 2025 annual meeting

Mary and Karin



# TS-EAS and meetings

- Close to the SAA annual meeting TS-EAS meets for a longer meeting
- This year we met online for four days

Summary from our meetings this week to follow after we have talked some about the current on-going revision!



# Revision recommendations and schedule up until now

- Each standard had its own revision cycle
  - Considers and implements requests from the community following the rolling revision cycle for minor revisions (annually) of the Encoded Archival Standards (EAS)
  - Leads the major revision of the EAS following SAA's and the Standards Committee's recommendation for general review every 5 years
- Revision cycles for EAD and EAC-CPF were staggered
  - Has led to misalignment and discrepancies between the two standards, particularly with the shared elements
- Introduction of a third standard EAC-F would create yet another revision cycle



# Moving forward

- We will still follow the revision cycle guidelines
  - Considers and implements requests from the community following the rolling revision cycle for minor revisions (annually) of the EAS
  - Leads the major revision of the EAS following SAA's and the Standards Committee recommendation for general review every 5 years
- However, all the EAS, i.e. EAC-CPF, EAC-F and EAD, will be treated as a suite of standards
  - Major revision will be happening for all at the same time
  - Minor revisions will happen yearly for them as needed and requested by the community



## Focus of our meeting was to be ready to:

- Handover the revision of EAD (EAD4) and the new EAC-F and an update to EAC-CPF
  - To get them all on the same page



## Ensure:

- That we are following the [TS-EAS Design Principles](#)



# Schema principles

1. Simplicity comes first.
2. Community needs are tied with (and tied to) the first principle.
3. The schemas exist, first and foremost, to allow the Community to validate and share archival description, which should in turn adhere to archival descriptive standards.
4. Readability matters, especially since our Community is a community of people.
5. Since our Community is an international community, the schemas support internationalization.
6. The schemas permit customizations, acknowledging that local requirements exist, without sacrificing interoperability.
7. Value lists populated from external sources will be maintained for the current version only.
8. The schemas are free to use without restrictions on their use.
9. The schemas will be revised, not in isolation, but in the context of related standards as well as changing technologies.
10. Only the current version is supported.



# Documentation principles

Documentation should/will:

1. Be published online and made available under the terms of an open licence.
2. Include encoding examples.
3. Be accessible, adhering to established standards and best practices.
4. Be published in English as its primary language.
5. Comprehensively reflect the most current version of the schemas.
6. Be transparent.
7. Be useful for both technical implementers and metadata creators.



# Day 1

---



# Outstanding Standards Decisions discussion

- EAC-F: no outstanding issues
- EAC-CPF: remaining issues
  - [GitHub issue #238](#) - Rename <provenanceEvent> and its content model
    - Resolution:
      - Rename <provenanceEvent> to <narrativeEvent>
      - All sub-elements are repeatable
  - [GitHub issue # 267](#) - Attributes for <multipleIdentities>
    - Resolution:
      - Treat <multipleIdentities> in the same way we are treating all elements in all three EAS.
      - Extra: Detailed examples are needed in Best Practices Guide to clearly explain the multiple identities element.



# Outstanding Standards Decisions discussion cont'd

- EAD: remaining issues
  - Element <function> in EAD
    - We are going to have EAC-F. How does the EAD element <function> fit into the picture?
      - In EAC-CPF <functions> -> <functionsPreformed> and <function> -> <functionPreformed> to differentiate from EAC-F but still be able to give a brief description of the function that was performed by the described entity.
    - Background information was provided for <function> in EAD including comparison to EAC-CPF 2.0.1 and EAF 1.0. Note the distinction that the <function> element in EAD is to document the relationship between a function and the described materials it generated.
      - Resolution:
        - Retain <function> as it currently is for EAD 4.0 with a possibility to a brief description or a reference to a EAC-F document.
        - Detailed examples are needed in Best Practices Guide to clearly explain the <function> element.



# Overall conclusions

- We will be asking for examples of descriptions of functions and activities that are recorded from institutions using for example AtoM but also other systems from the larger community.
- The new EAS standard EAC-F will be promoted with different types of outreach like webinars and email to inform about why and when to use it!



# Our Best Practices Guide

- An addition from the last revision of EAC-CPF was the Best Practices Guide (BPG)
- We will now get an introduction to the BPG!



# Best Practices Guide (BPG)

TS-EAS Annual Meeting, 14 August 2025, Iris Lee

---

# Overview

Background and Rationale

@id

ID [toc]

## Summary:

A unique identifier to name the element.

## Description and Usage:

An identifier that must be unique within the current document and is used to so that it can be referred to, or referenced from, somewhere is building links between the element and other resources.

tionDeclarationReference, localTypeDeclarationReference, Reference, or sourceReference to link to an id attribute within the EAC-CPE instance.

ata Type

xample

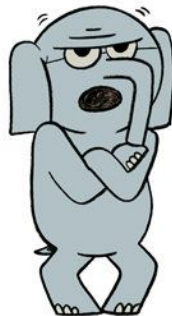
```
<occupation>  
<term>Assistant  
III</term>  
<placeName  
target="#place1"  
>  
</occupation>  
</occupations>  
</es>  
<place id="place1"  
<placeName>Bern<
```

```
<role>Place of work</placeRole>
```

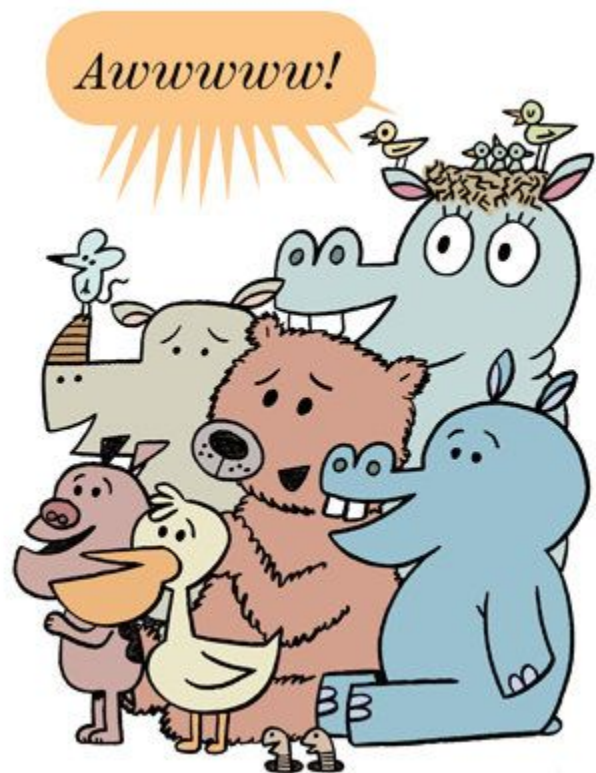
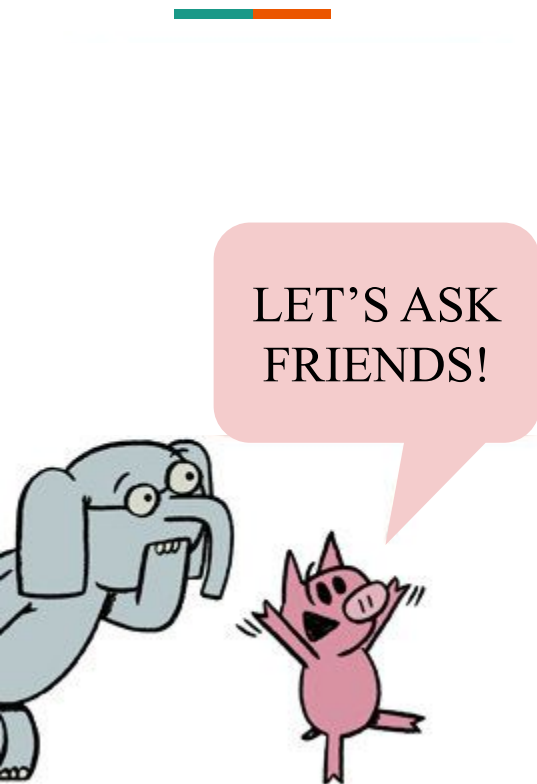
I do not understand  
this @id @target  
business

I have read the Tag  
Library over and over  
and over and I still  
DO NOT GET IT

I have an  
idea!









# The Best Practices Guide (BPG) – What is it? Why do we need one? Who is going to write it?

- Initially developed in 2022 as a shared document to describe and provide examples of the concepts and encodings of (then) newly revised EAC-CPF 2.0
- Goals:
  - Provide context around certain topics in archival description
  - Share real use cases with example encodings
  - Promote wider adoption and comfort in employing standards
  - Describe usage in natural language
  - Create a unified format that would include all EAS (EAD and EAC-F)
  - ***Build a living resource, built by and for our professional community***



# Tag Library vs. BPG

## Tag Library

- Written, approved and published by schema committee
- Defines elements and attributes in metadata schema (alphabetical order)
- Documents values and constraints generally
- Reference for creating valid metadata for schema releases

## BPG

- Produced by committee with open contributions, with on-going additions as needed
- Describes elements and attributes in context, not element-by-element explanations
- Documents examples of valid encodings for specific use cases
- Reference for creating valid metadata based on schema releases



# @id, @target Tag Library vs. BPG

**@id**      **ID** [\[toc\]](#)

**Summary:**      A unique identifier to name the element.

## Description and Usage:

An identifier that must be unique within the current document and is used to name the element so that it can be referred to, or referenced from, somewhere else. This facilitates building links between the element and other resources.

Use target, conventionDeclarationReference, localTypeDeclarationReference, maintenanceEventReference, or sourceReference to link to an id attribute within the EAC-CPF instance.

**Data Type:**      ID

## Example:

```
<occupations>
  <occupation>
    <term>Assistant examiner – level
      III</term>

    <placeName
      target="#place1">Bern</placeName>

  </occupation>
</occupations>

<places>
```

## References

### Internal References

**Schema:** EAC-CPF

**Context:** Creating a reference from one element to another element in a single EAC-CPF instance.

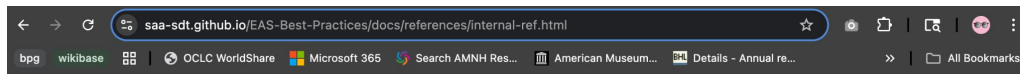
**Description:** It is possible to create internal references from one element to another element within a single EAC-CPF instance. For example, you may wish to reference a detailed <place> element from <placename> elsewhere in the EAC-CPF instance. The @id and @target attributes are used to create these internal references.


The @id attribute is available on all elements to assign an identifier to an element that is unique within the instance. The @target attribute is available on all elements, except <eac>, and can be used to refer to the @id of another element. To create the reference, use the @target attribute on the element you wish to create a reference from, and enter the value of the @id attribute on the element you wish to refer to, preceded by #. It is possible to refer to more than one element from a single element.

## Examples:

```
<occupation>
  <term>Assistant examiner - level III</term>
  <placeName target="#place1">Bern</placeName>
</occupation>
<place id="place1">
  <placeName>Bern</placeName>
  <placeRole>Place of work</placeRole>
  <address>
    <addressLine addressLineType="street">Stauffacherstrasse 65/59g</addressLine>
    <addressLine addressLineType="postalCode">3003</addressLine>
    <addressLine addressLineType="country">Switzerland</addressLine>
```

# @id, @target explained online





[Home](#)  
[Dates](#)  
[Names](#)  
[Relations](#)  
[References](#)  
[Internal references](#)  
[Referencing external vocabularies, ontologies, etc.](#)  
[Referencing external sources](#)  
[Chronological list](#)  
[Places and geographic features](#)  
[Locally defined value lists](#)  
[Lists as part of narrative description](#)  
[Entity types](#)  
[Identifiers](#)  
[Control](#)  
[EAS Value Lists](#)  
[Examples](#)

## Internal references

**Schema:** EAC-CPF 2.0

**Context:** Creating a reference from one element to another element in a single EAC-CPF instance.

**Description:** It is possible to create internal references from one element to another element within a single EAC-CPF instance. For example, you may wish to reference a detailed `<place>` element from `<placeName>` elsewhere in the EAC-CPF instance. The `@id` and `@target` attributes are used to create these internal references.

The `@id` attribute is available on all elements to assign an identifier to an element that is unique within the instance. The `@target` attribute is available on all elements, except `<eac>`, and can be used to refer to the `@id` of another element. To create the reference, use the `@target` attribute on the element you wish to create a reference from, and enter the value of the `@id` attribute on the element you wish to refer to, preceded by `#`. It is possible to refer to more than one element from a single element.

### Examples

```
<occupation>
  <term>Assistant examiner - level III</term>
  <placeName target="#place1">Bern</placeName>
</occupation>

<place id="place1">
  <placeName>Bern</placeName>
  <placeRole>Place of work</placeRole>
  <address>
    <addressLine addressLineType="street">Stauffacherstrasse 65/59g</addressLine>
    <addressLine addressLineType="postalCode">3003</addressLine>
```

GitHub Pages:  
<https://saa-sdt.github.io/EAS-Best-Practices/>



# Centralized EAS schema resource

## Tag Libraries for EAS schemas



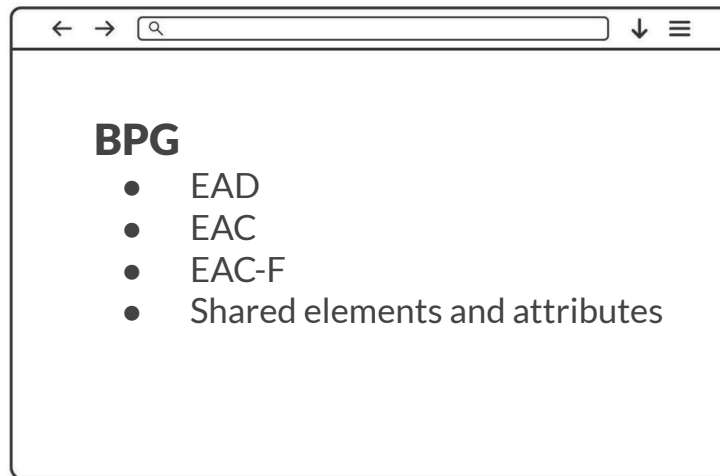
EAD



EAC

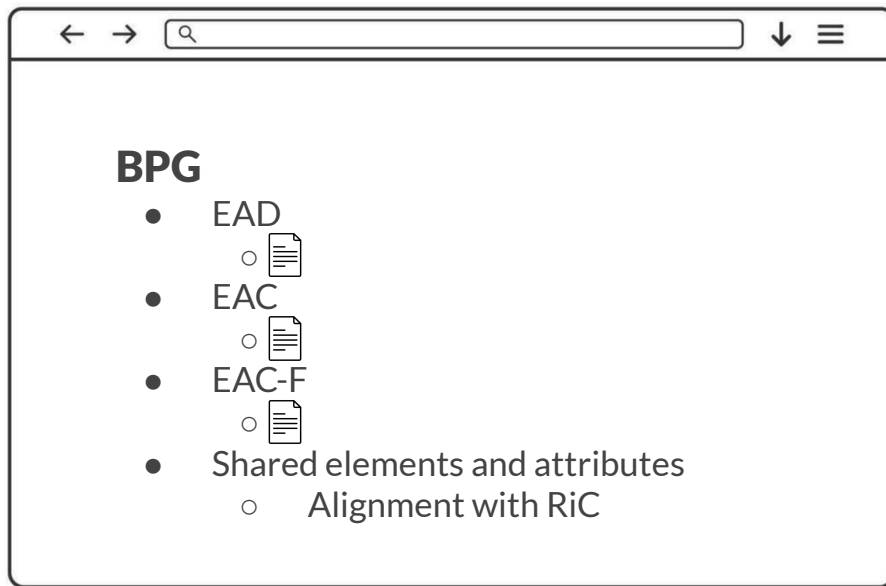


EAC-F





# Centralized EAS schema resource





# Encoded examples: basic and complex

The most simple encoding option for an agent

```
<agent>  
  
<label>National Association for the Advancement of Colored People</label>  
  
  
  
  
  
  
  
  
  
</agent>
```

The most complex encoding option (linking to EAC-CPF)

```
<agent agentType="group"  
valueURI="http://n2t.net/ark:/99166/w6k17w53"  
vocabularySource="SNAC">  
  <label>National Association for the Advancement of Colored People</label>  
  <dateRange>  
    <fromDate standardDate="1842">1842</fromDate>  
    <toDate standardDate="2019">2019</toDate>  
  </dateRange>  
  <placeName valueURI="https://www.geonames.org/4347820/city-of-baltimore.html" vocabularySource="GeoNames">Baltimore, Maryland  
  </placeName>  
  <role valueURI="https://www.ica.org/standards/RiC/ontology#isAuthorOf"  
vocabularySourceURI="https://www.ica.org/standards/RiC/ontology/">  
  <relationship valueURI="https://www.ica.org/standards/RiC/ontology/#CreationRelation" vocabularySourceURI="https://www.ica.org/standards/RiC/ontology/">  
</agent>
```



---

# BPG Online

Using GitHub Pages



# GitHub Pages for web publishing

- <https://pages.github.com/>
- Website built from GitHub repository using Jekyll
  - Jekyll is a static site generator with built-in support for GitHub Pages
  - Not the only way to build a GitHub site, but probably the easiest
- Many open-source Jekyll themes to choose from
  - <https://jekyllthemes.io/free>
- BPG uses [Just the Docs](#) theme
  - Free
  - Simple, no fuss site
  - Customizable



# Markdown

- Easy to learn, easy to use
- Perfect for publishing snippets of code
- Once a format is established, pages can be generated quickly

Preview

Code

Blame

```
1 ---
2 layout: default
3 title: Uncertain dates
4 parent: Dates
5 nav_order: 1
6 ---
7
8 ✓ # Uncertain dates
9 **Schema:**
10 EAC-CPF 2.0
11
12 **Context:**
13 Encoding uncertain dates in `<date>`, `<toDate>`, `<
14
15 **Description:**
16 The attributes `@certainty`, `@notBefore` and `@notA
17
18 EAC-CPF will also enable the use of the Extended Dat
19
20 **Example**
21 ```xml
```



# Markdown guide

Should you want to explore more on your own:

<https://www.markdownguide.org/>

---

# Formatting Content

Keep it Simple, Keep it Consistent



# Simple, consistent

- Unified format. Think: TEMPLATE
- Accommodate all the EAS standards
- Provide content for more than one standard on a page
- Ensure this can be a growing resource with multiple users publishing content to site
- Goals:
  - Easily shared
  - Easily updated
  - Easily understood
- *Caveat: Not there yet, but will be undergoing major restructuring during EAS schema approvals*



# Levels of content

## First Level

- Appears in left navigation
- Contains subpages
- Main body contains
  - Title of topic
  - Description of topic
  - Table of contents
- *Caveat: Not all first level pages have descriptions, yet.*

Relations ✓

References ✓

Chronological list ✓

Places and geographic features ✓

Locally defined value lists ✓

Lists as part of narrative description ✓

Entity types ✓

Identifiers ✓

Control ✓

### EAS Value Lists

addressLineType

audience

contactLineType

coverage

descriptionOfComponentsType

detailLevel

extentType

identityType

level

maintenanceEventTvoe

This site uses [Just the Docs](#), a documentation theme for Jekyll.

## EAS Value Lists

Value lists are provided as controlled terms defined by TS-EAS. EAC-CPF 2.0 has these value lists defined in the schema; EAD 4.0 asks for an indication with `<control>` as to whether the EAS lists are used or whether the values are taken from another list. When elements or attributes have constrained data values, in EAC-CPF 2.0 or when EAD 4.0 is used with “EASList” as the encoding source, choose the appropriate term as defined in the EAS tag libraries. Some examples can be found below.

### TABLE OF CONTENTS

- [addressLineType](#)
- [audience](#)
- [contactLineType](#)
- [coverage](#)
- [descriptionOfComponentsType](#)
- [detailLevel](#)
- [extentType](#)
- [identityType](#)
- [level](#)
- [maintenanceEventType](#)
- [maintenanceStatus](#)
- [publicationStatus](#)
- [status](#)

# Levels of content

## Second Level (most pages)

- Appears in left navigation
- May contain subpages
- Main body contains
  - Title of topic
  - Related schema
  - Context for topic
  - Description of topic
  - Encoded example(s)

[Home](#)[Dates](#)[Uncertain dates](#)[Unknown or ongoing date ranges](#)[Names](#)[Relations](#)[References](#)[Chronological list](#)[Places and geographic features](#)[Locally defined value lists](#)[Lists as part of narrative description](#)[Entity types](#)[Identifiers](#)[Control](#)[EAS Value Lists](#)[Examples](#)[Crosswalks](#)[Dates](#) / [Uncertain dates](#)

## Uncertain dates

**Schema:** EAC-CPF 2.0**Context:** Encoding uncertain dates in `<date>`, `<toDate>`, `<fromDate>`

**Description:** The attributes `@certainty`, `@notBefore` and `@notAfter` can be used with the `<date>`, `<toDate>`, `<fromDate>` elements to express the level of certainty of a particular date. `@notBefore` and `@notAfter` can be used to indicate the earliest and latest possible dates that an uncertain date might fall between. `@certainty` can be used to encode a term such as approximate, circa, or uncertain to indicate the level of certainty of the date provided. The `@calendar` and `@era` attributes are also available to provide additional information about the date.

EAC-CPF will also enable the use of the Extended Date/Time Format (EDT) which has been included in the latest version of the ISO 8601 standard. This allows for the encoding of dates as 'uncertain' (?), 'approximate' (~), and 'uncertain and approximate' (%) within the machine-processable date in the `@standardDate` attribute for `<date>`, `<fromDate>` and `<toDate>`.

### Example

```
<dateRange>
  <fromDate notBefore="1971" notAfter="1975">around 1973</fromDate>
  <toDate standardDate="1992">1992</toDate>
</dateRange>
```



# Levels of content

## Second Level (value lists)

- Appears in left navigation
- Main body contains
  - Title of list type
    - Scope note
    - Citations (optional)
    - Encoded example(s) (optional)
  - Value term (## term in md)
    - Scope note
    - Citations (optional)
- **## term** values can be harvested which is why bolded subsections are preferred throughout.

## addressLineType

**Scope Note:** To identify the different parts of a physical address, e.g., for public access or to contact and/or communicate with someone by postal services.

Resources consulted for value terms and scope notes include:

- Encoded Archival Guide (EAG): <http://www.apex-project.eu/index.php/en/outcomes/standards/eag-2012/tag-library>
- ISDIAH chapter 5.2.1 Location and address(es), [https://www.ica.org/app/uploads/2023/12/CBPS\\_2008\\_Guidelines\\_ISDIAH\\_rst-edition\\_EN.pdf](https://www.ica.org/app/uploads/2023/12/CBPS_2008_Guidelines_ISDIAH_rst-edition_EN.pdf)

@addressLineType is an attribute used to specify the type of address in <addressLine>. Accepted values for @addressLineType are listed below with scope notes.

### Example

```
<addressLine addressLineType="postalCode">10024</addressLine>  
<addressLine addressLineType="country">United States</country>
```

## county

**Scope Note:** Second-level administrative division where a geographic location or feature is located; in a specific national context, this could be a canton, a commune, a county, a department, a district, a prefecture, a province, a

ture, etc.; note that a term used for a second-level administrative



# Levels of content

## Third Level

- To be determined
- Expect same formatting decisions

---

# Restructuring

To Better Accommodate EAS



# Growth and change

With EAD4 and EAC-F being finalized, it was time to rethink how users would navigate the site

High level draft revisions include:

- Update general text for inclusion of EAD and specifically EAC-F plus EAS alignment
- Add section for shared elements and attributes
- Add page to orient users and provide useful information about how to use the site
- Reorganize content into fewer main sections
- Create different issue templates for making suggestions and proposing new content

## Home

Dates



Names



Relations



References



Chronological list

Places and geographic  
features

Locally defined value lists

Lists as part of narrative  
description

Entity types



Identifiers



Control



EAS Value Lists



Examples



Crosswalks



# Encoded Archival Standards: Best Practices Guide

The Encoded Archival Standards: Best Practices Guide is a resource that describes and provides explanations and examples of complex encodings and concepts in Encoded Archival Context – Corporate Bodies, Persons and Families (EAC-CPF) and Encoded Archival Description (EAD).

Created and maintained by the Society of American Archivists, Technical Subcommittee on Encoded Archival Standards (TS-EAS), the guide is intended to be a growing resource that will be built on and developed over time based on user community feedback and as use cases emerge.

The Best Practices Guide will complement the existing EAC-CPF and EAD Tag Libraries. While the Tag Libraries describe each element and attribute individually, the Best Practices Guide provides more in-depth explanations of sets of elements and attributes being used together to fulfill a variety of use cases. These are accompanied by best practice examples for different use cases, where possible based on real usage, to clarify the encoding. For detailed information about individual elements and attributes, see the [EAC-CPF Tag Library](#) or the [EAD Tag Library](#).

EAC-CPF is based on the International Standard Archival Authority Record for Corporate Bodies, Persons and Families (ISAAR-CPF). Revisions to the EAD and EAC-CPF standards are being undertaken by the Technical Subcommittee on Encoded Archival Standards (TS-EAS) based on the requirements of the Society of American Archivists' standards maintenance schedule and policies, and are not tied to ongoing development of standards by the ICA, though keeping close connections to the ICA Experts Group on Archival Description as a related standards body. For this reason, the EAC-CPF 2.0 continues to be based on ISAAR(CPF) rather than the draft versions of Records in Contexts. We anticipate that future versions of EAC-CPF and other standards maintained by TS-EAS will take the Records in Contexts – Conceptual Model into account once it is finalized and approved.

# Simplify Main Navigation

[Home](#)[Dates](#)[Names](#)[Relations](#)[References](#)[Chronological list](#)[Places and geographic features](#)[Locally defined value lists](#)[Lists as part of narrative description](#)[Entity types](#)[Identifiers](#)[Control](#)[EAS Value Lists](#)[Examples](#)[Crosswalks](#)

🔍 Search Encoded Archival Standards Best Practices Guide

[EAS BPG on GitHub](#)

## Encoded Archival Standards: Best Practices Guide

The Encoded Archival Standards: Best Practices Guide is a resource that describes and provides explanations and examples of complex encodings and concepts in Encoded Archival Context – Corporate Bodies, Persons and Families (EAC-CPF) and Encoded Archival Description (EAD).

Created and maintained by the Society of American Archivists, Technical Subcommittee on Encoded Archival Standards (TS-EAS), the guide is intended to be a growing resource that will be built on and developed over time based on user community feedback and as use cases emerge.

The Best Practices Guide will complement the existing EAC-CPF and EAD Tag Libraries. While the Tag Libraries describe each element and attribute individually, the Best Practices Guide provides more in-depth explanations of sets of elements and attributes being used together to fulfill a variety of use cases. These are accompanied by best practice examples for different use cases, where possible based on real usage, to clarify the encoding. For detailed information about individual elements and attributes, see the [EAC-CPF Tag Library](#) or the [EAD Tag Library](#).

EAC-CPF is based on the International Standard Archival Authority Record for Corporate Bodies, Persons and Families (ISAAR-CPF). Revisions to the EAD and EAC-CPF standards are being undertaken by the Technical Subcommittee on Encoded Archival Standards (TS-EAS) based on the requirements of the Society of American Archivists' standards maintenance schedule and policies, and are not tied to ongoing development of standards by the ICA, though keeping close connections to the ICA Experts Group on Archival Description as a related standards body. For this reason, the EAC-CPF 2.0 continues to be based on ISAAR(CPF) rather than the draft versions of Records in Contexts. We anticipate that future versions of EAC-CPF and other standards maintained by TS-EAS will take the Records in Contexts – Conceptual Model into account once it is finalized and approved.



# Collapsing topics into sections

## Current:

- Home
- Dates
- Names
- Relations
- References
- Chronological list
- Places and geographic features
- Locally defined value lists
- Lists as part of narrative description
- Entity types
- Identifiers
- Control
- EAS Value Lists
- Examples
- Crosswalks

## New:

- Home
- About BPG
- About EAD
- About EAC-CPF
- About EAC-F
- Shared elements
- Control
- Names or Identity
- Description
- Function
- Relations
- References
- Crosswalks

# Collapsing topics into sections

Current:

- Home
- Dates
- Names
- Relations
- References
- Chronological list
- Places and geographic features
- Locally defined value lists
- Lists as part of narrative description
- Entity types
- Identifiers
- Control
- EAS Value Lists
- Examples
- Crosswalks

New:

- Home
- About BPG
- About EAD
- About EAC-CPF
- About EAC-F
- Shared elements
- Control
- Names or Identity
- Description
- Function
- Relations
- References
- Crosswalks

Overview and how to use site

Focus on schemas

Sections within descriptive record

Important concept across schemas

Helpful related information



# Collapsing topics into sections

Current:

- Home
- Dates
- Names
- Relations
- References
- Chronological list
- Places and geographic features
- Locally defined value lists
- Lists as part of narrative description
- Entity types
- Identifiers
- Control
- EAS Value Lists
- Examples
- Crosswalks

New:

- Home
- About BPG
- About EAD
- About EAC-CPF
- About EAC-F
- Shared elements
- Control
- Names or Identity
- Description
- Function
- Relations
- References
- Crosswalks

Links from topic  
pages to schema

Links from schema  
pages to topics

---

# Collaboration and working documents

# Collaboration



**Iris Lee**  
deletedname  
Cataloging and Metadata Librarian

*Iris created the site, but Iris did not write the content on the site.*

The BPG is a cooperative effort within TS-EAS. Content is provided by:

- TS-EAS Working Groups
  - EAC-CPF Team
  - EAD Team
  - EAC-F Team
  - EAS Schema Team





# Collaboration

Subteams may have existing drafts for the BPG. They can:

- Keep them until content is finalized
  - Topic paper
  - Spreadsheet or data table
- Move working drafts into a shared BPG folder

Drafts that are ready to be published (approved by Team chair), can submit a GitHub Issue and upload a copy of the final draft in a designated folder (to come) in the GitHub repository.



# Contributions outside TS-EAS

We welcome feedback and requests from the wider community! They can submit:

- GitHub Issues (templates for different needs to come)
- Email [ts-eas@archivists.org](mailto:ts-eas@archivists.org)

Visibility, engagement and support will be needed! Some ideas:

- Outreach and communications to send a call out to the public regularly
- Publish links to BPG on SAA site, Tag Libraries, other publications

The BPG is a living document for creators of archival descriptions. People from the community are invited to propose content or highlight issues to tackle in EAS. Contributions will be vetted by EAS Teams for inclusion in the site.



# Iterations, releases and archives

May 2023 to today -- *Encoded Archival Standards Best Practices Guide v0.1 (beta)*

- Mostly refers to EAC-CPF 2.0
- Includes working pages for EAS value lists (not yet approved)
- Not wholly realized

February 2026 -- *Encoded Archival Standards Best Practices Guide v1.0*

- Will cover EAC-CPF 3.0, EAC-F, EAD4
- Draft new release in new branch starting October 2025 (or sooner)
- Will include links to archived pages as reference for EAC-CPF 2.0

March 2026 to August 2026 -- Gather user feedback

Intervening years between major schema revisions

- Documentation Task Force will continue to meet quarterly and review additions and changes

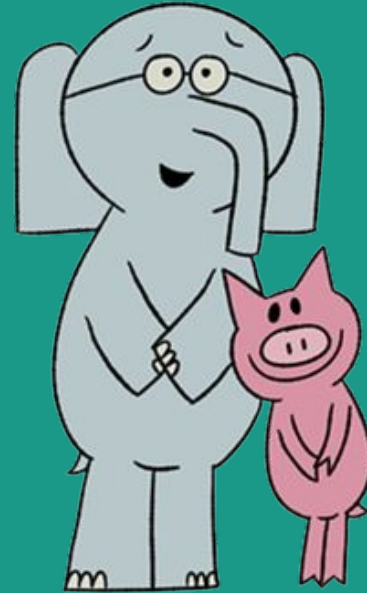


**Thank you!**

---

# Thank you!

[Elephant and Piggie series on Goodreads](https://www.goodreads.com/author/show/Mo_Willems/Elephant_and_Piggie)



**Elephant &  
Piggie**

By Mo Willems - <https://mowillemsworkshop.com/catalog/books/collection/elephant-and-piggie>,  
Fair use, <https://en.wikipedia.org/w/index.php?curid=79219364>



# Day 2

---



# Shared elements and attributes

- Moving forward we have introduced the concept of shared elements and attributes.
  - These are described in the upcoming new Tag Libraries and conforms to the TS-EAS Design Principles, emphasizing Principle 1, “each element will be defined once.”
  - What we lacked was a formal decision. (This feels so natural....).
    - Resolution: the entire TS-EAS membership formally agreed that the aligned EAS should include shared elements and attributes. Members also suggested that the TL/BPG should highlight where elements/attributes are shared and why they are shared.



# Examples

- We also talked about encoding examples both in the Best Practices Guide and the Tag Libraries
  - A way to show how elements and attributes look
  - Give guidance on usage
  - Resolution: A working group was formed to look into how this should be accomplished, with an eye towards meeting community needs



# Our Tag Libraries

- The Tag Libraries (TL's) are evolving and are the authoritative document
- We will now get an introduction to the TL's!



# Tag Library Update

TS-EAS Annual Meeting, 14 August 2025, Alex Duryee



# Introduction to the Tag Libraries

- All TS-EAS tag libraries are managed in GitHub
  - <https://github.com/SAA-SDT/EAS-TagLibraries/>
- Tag libraries encoded in TEI XML
  - One XML file per attribute/element
  - Top-level XML file per standard
- Build process generates PDF + HTML



# Introduction to the Tag Libraries

- Content is managed by respective subteams
- TL/BPG Task Force manages the rest
  - Approving changes
  - Resolving conflicts between versions
  - Squashing bugs
  - Enhancing PDF/HTML generation
- Task Force has been very busy this summer!



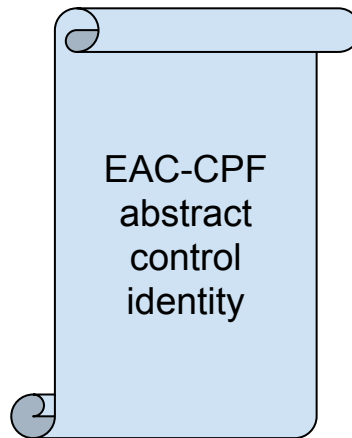
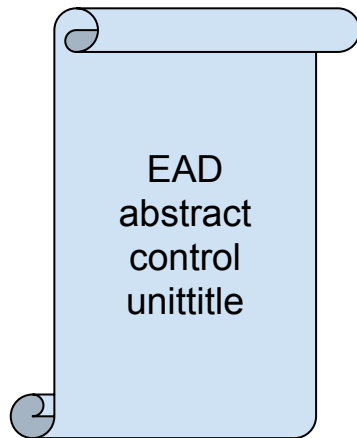
# TL/BPG Task Force

- Alex Duryee, Iris Lee, Ailie Smith
- Created this winter to formally manage documentation
- Oversees GitHub repository, TL/BPG policy

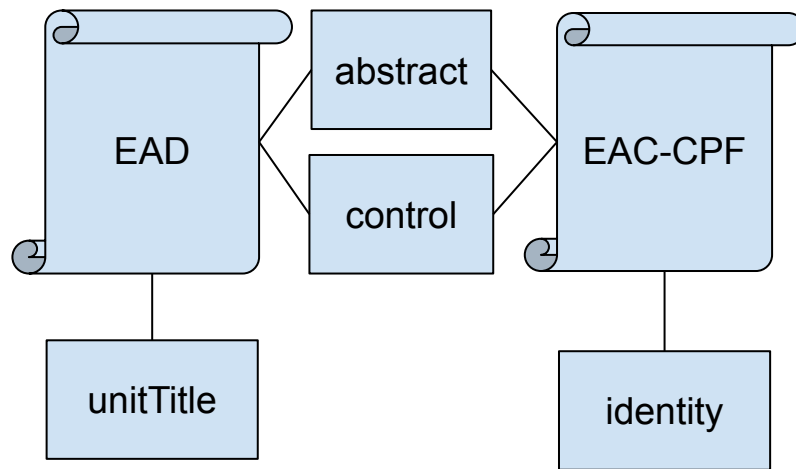




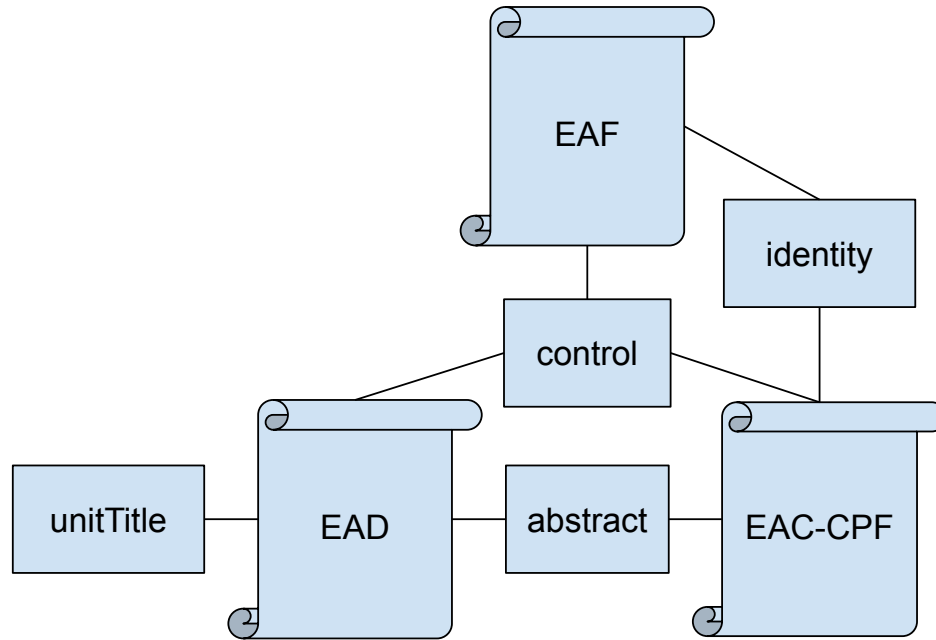
# The Bad Old Days



# Shared Pages



## ...Now With EAF





# Shared Pages

- Ensures alignment across standards
- Update once = update everywhere
- Simplifies management of the tag libraries
- Directory structure
  - shared/ for shared pages
  - ead4, eac3, eaf1 for specific pages
  - Subdirectory for language (en/ for now)

```
<xi:include href="shared/en/ele-abstract.xml"
<xi:include href="shared/en/ele-address.xml"
<xi:include href="shared/en/ele-addressLine.x
<xi:include href="shared/en/ele-agencyCode.xml
<xi:include href="shared/en/ele-agencyName.xml
<xi:include href="shared/en/ele-agent.xml" pa
<xi:include href="eac3/en/ele-alternativeSet.
<xi:include href="shared/en/ele-biogHist.xml"
<xi:include href="shared/en/ele-citedRange.xml
<xi:include href="eac3/en/ele-componentEntry.
<xi:include href="shared/en/ele-contact.xml"
<xi:include href="shared/en/ele-contactLine.x
<xi:include href="shared/en/ele-control.xml"
```



# Managing Shared Elements And Attributes

- EAC, EAD, and EAF aren't completely aligned
  - e.g. a shared element may contain different elements
- Using XML attributes to flag what text goes to what standard

```
<p type="ead">A required child element of <gi>agent</gi>, <gi>formAvailable</gi>,  
<p type="eac">A required child element of <gi>agent</gi>, <gi>place</gi>, and <gi>  
<p type="eaf">A required child element of <gi>agent</gi> and <gi>relation</gi> th
```



## Recommendations regarding transparency in descriptive practices

- In the EAS standards there is an emerging need to be able to describe when Artificial Intelligence (AI)/DEI/Harmful language needs to be documented, we aim for now to solve this using the elements we already have.
- A topic paper have been created and was discussed:
  - How to use the <control> elements <conventionDeclaration> and <maintenanceEvent> to describe when and where this has been utilised to create or enhance the EAS document or a related resource
    - In combination with using @conventionDeclarationReference and @maintenaceEventReference
  - How to use the EAD element <accessConditions> to inform about accessibility depending on for example physical size of a record
  - For content warnings there is a lot of dependencies, one being the evolution of your content standard and how it recommends handling these types of warnings
- TS-EAS agreed that this recommendation will be part of the Best Practices Guide!

# Day 3

---



# The day for breakout rooms!

- Sometimes we need to solve things in smaller groups.
- Breakout rooms to the rescue!





# Breakout #1: Relations

- **Overall goal:**
  - Have as many examples of the practical application of relations for the three standards and how relations work among the three standards.
- **Result:**
  - Using the relation elements gives an opportunity to be more specific in describing a relation than just having a textual note
  - Use cases have been developed that will be reused as examples in the BPG



## Breakout #2: Alignment of standards – EAS “one pager”

- **Overall goal:**
  - Create a “one pager” summarizing the alignment of the three standards, similar to the infographic we produced for EAD 4.0. This could include bullet points, graphics, etc. but should explain the purpose and benefits of the alignment. Will also be used in the submission package to the Standards Committee and then SAA Council.
- **Result:**
  - Misalignment by design -> Alignment by design
  - We had standards with similar elements and attributes being in their own silos, now we are sharing and reusing our elements and attributes!
  - Text has been created that will become text in the BPG and an infographic



## Breakout #3: Tag library and shared elements

- **Overall goal:**
  - Create a “one pager” about the shared elements (including what they are, importance of, impact on community, etc.) This will serve as the introduction to shared elements in the Best Practices Guide. Will also be used in the submission package to the Standards Committee and then SAA Council.
- **Result:**
  - The benefits of sharing is so obvious but we have not until now really taken the advantage of sharing
  - Technical and structural differences between standards may prevent perfect alignment, but these are not conceptual mismatches—core elements remain consistent and reusable
  - A text has been created that will be reused as an introduction and explanation in the BPG

# Day 4

---



# The submission packet

- Our next step is to finalise our submission packet to the Standards Committee who after approval sends it to SAA Council for final approval
- Part of the submission
  - Textual document describing the submission and the work leading up to the authoritative submission
  - The authoritative submission is the TL's
    - Aid for being able to express the TL's the different types of XML-schemas
- More about this work in the following slides!

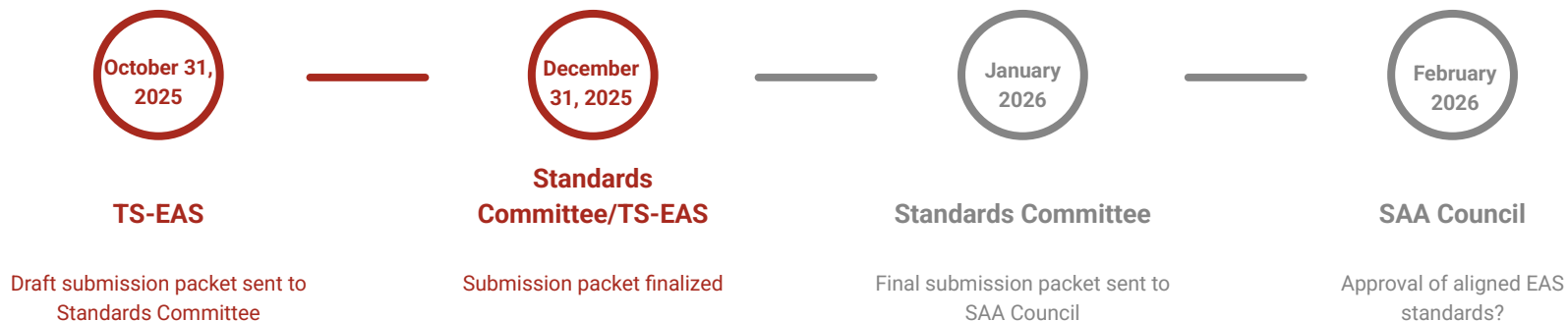


# The submission packet components

A	B
<b>Introductory Narrative</b>	<b>Completed</b>
Purpose or objective of proposed standard/revision	
Specific audiences, circumstances, or techniques to which the standard is directed	
Background and supplementary information, as necessary, that might provide context for how the standard was developed and how it is/will be used	
History and methodology of the standard's development/revision	
List of who participated in the development process	
Relationship to predecessor documents, if applicable	
Discussion of significant changes from earlier versions, if applicable	
Illustrations for examples of how the standards can be applied	
Glossary or definitions of terms, if necessary	
Bibliography, if necessary	
<b>Documentation of the Consultation Process</b>	
Copies of correspondence from other organizations supporting the proposed standard	
Clippings from publications/websites that publicized the project	
Copies of correspondence discussing areas of dispute	
Explanations of efforts made by the development group to accommodate expressed concern and/or justification for approving the standard in the absence of universal agreement	
<b>Maintenance and Review Plan</b>	
Development team should recommend a plan for maintenance and review of the standard	
<b>Full Text of Standard</b>	



# The submission packet timeline





# Planned companions to the submission packet

- SAA 2026
  - Submit a proposal for a session at SAA 2026
- Outreach and communication to plan and do
  - Webinars
  - Posts or articles in professional journals



---

# Q&A

Co-chairs and Teamleads



# What questions do you have to TS-EAS?

- About the result of our meetings this week?
- About the different standards?
- About .....?



# So to start the discussion

There were a call for comment on EAD this spring, what happened?



# EAD revision - Call for Comments

- Reviewing and deciding upon feedback received during call for comments
  - Ran from 14 April to 16 May 2025
  - Based on EAD 4.0 draft 0.2, which included changes following feedback received from the community in Spring/early Summer 20204
  - Received 16 new comments in total (two via webform, the rest via GitHub)
  - 9 related to the schema (1 identified as irrelevant afterwards),
  - 7 related to the tag library (2 were straightforward bugs and have been set to “implement” already; 1 required clarification from the issue submitter)
  - There are various issues around clarifying the use of formAvailable for specific existing use cases of (digital) instantiations plus a handful of issues dealing with other single elements

# EAD revision - Call for Comments

Comment	Comment type	Comment target	Submitted via	GitHub issue	Status	Discussed at EAD team meeting in	Reasoning for rejection and other comments
EAD4 should include @action and @type for <formAvailable> -> Include encoding example using the fields of DiacCM (especially the ACTION and TYPE fields)	Feature request	ead-archDesc	GitHub	#202 #176	Implement	June 2025	Transferred to Tag Library repository; will also be addressed in the BPG
EAD4 should allow for dual human- and machine-readable notes and encode that relationship as different representations of the same thing -> Include examples illustrating the parallel encoding of human- and machine-readable versions of the same information plus Include examples illustrating varying access conditions for individual <formAvailable> elements	Feature request	ead-archDesc	GitHub	#204 #185 #186	Implement	June 2025	Transferred to Tag Library repository; branched out into two individual issues (one about access to instantiations, one about human- and machine-readable notes); will also be addressed in the BPG
EAD4 <otherDescription> - possibility to use an equivalent of <num> in EAD 2002 to indicate an identifier in another system -> EAD4 - Review descriptions of attributes with type anyURI and the element <id> for their use with simple identifiers/numbers/codes	Feature request	Models and shared elements	GitHub	#206 #168	Implement	May 2025	Encoding options suggested; transferred to Tag Library repository (for clarification in the description of @valueURI); will also be addressed in the BPG
EAD4 - [draft0.2] formAvailable - Difference between SCHEMA and TAG LIBRARY	Bug	ead-archDesc	GitHub	#207	Closed		Was found to be a testing error resulting in the issue being retrieved.
EAD4 - [draft0.2] formAvailable - Origin and traceability -> EAD4 - formAvailable - Origin and traceability per instantiation	Feature request	ead-archDesc	GitHub	#208 #187 #12	Implement	June 2025	Transferred to Tag Library repository, then to BPG repository
EAD4 - [draft0.2] add @normal-attribute to referringString -> EAD4 (draft0.2) - Add a new attribute @normalizedForm to referringString	Feature request	Models and shared elements	GitHub	#209	Implement	May 2025	
EAD4 - [draft0.2] Single way of declaring controlled vocabularies within CONTROL	Feature request	Models and shared elements	GitHub	#212 #169	Implement	May 2025	Transferred to Tag Library repository; will also be addressed in the BPG
EAD4 - [draft0.2] Embedding other schema within <physicalOrTechnicalRequirements> -> Include examples for encoding additional information on instantiations based on other standards	Feature request	ead-archDesc	GitHub	#214 #188	Implement	June 2025	Transferred to Tag Library repository; will also be addressed in the BPG

[https://github.com/SAA-SDT/TS-EAS-subteam-notes/blob/master/ead-subteam/major-revision\\_2021-2025\\_documents/FeedbackReceived\\_2ndCallForComments\\_EAD4.0.pdf](https://github.com/SAA-SDT/TS-EAS-subteam-notes/blob/master/ead-subteam/major-revision_2021-2025_documents/FeedbackReceived_2ndCallForComments_EAD4.0.pdf)



# EAD revision - Call for Comments

- Resulting changes
  - Eventually only two issues resulting in schema changes:
    - We have added a new attribute @normalizedForm to <referringString> enabling the inclusion of a normalized way to state the name of an entity that is tagged as part of a longer narrative text
    - We revised our decision to remove a wrapper element for physical description statements and re-added <physicalDescription> to allow for bundling of <extent>, <dimensions>, and <physicalFacet>
  - All other issues have been addressed by adapting the texts in the Tag Library and/or will be picked up in new respectively extended articles in the Best Practices Guide (including encoding examples)

**Thanks very much for your attention  
and your questions / comments!**

**The recording will be published at the SAA YouTube channel and we will send out  
information when it is available!**

