

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

Call for Comments Open Sessions Series, Session 1, 24 April 2024

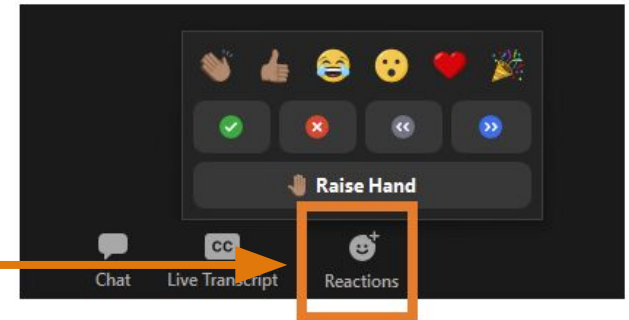
Call-in numbers: <https://zoom.us/join/83277593984>
Meeting ID: 832-7759-3984

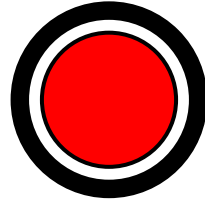
All lines are **muted**



Use **chat** for questions

Raise your hand to request to unmute





This webinar is being recorded and
will be available on YouTube:

<https://www.youtube.com/user/saastaff>

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Presenters

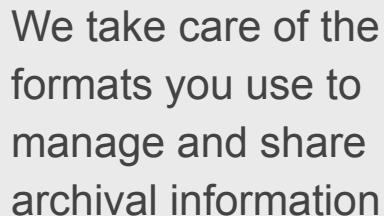
Karin Bredenberg, Kommunalförbundet Sydarkivera (SE), co-chair TS-EAS

Mary Samouelian, Harvard Business School (US), co-chair TS-EAS

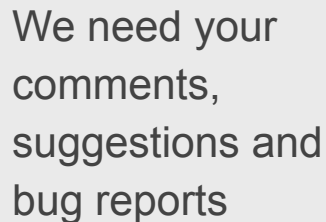
Kerstin Arnold, Archives Portal Europe Foundation (DE), EAD team lead

TS-EAS

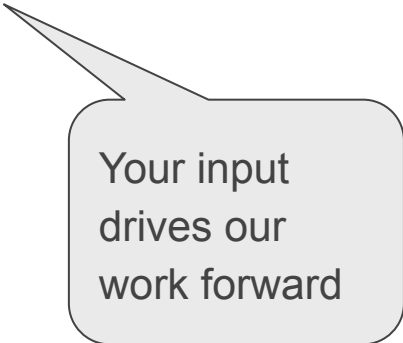
- Technical Subcommittee on Encoded Archival Standards at the Society of American Archivists (SAA)
- Background and work covered in this presentation:
 - <https://youtu.be/9NXNyx9py-I> (status of April 2020)



We take care of the formats you use to manage and share archival information



We need your comments, suggestions and bug reports



Your input drives our work forward

Where you can find more

TS EAS

<https://www2.archivists.org/groups/technical-subcommittee-on-encoded-archival-standards-ts-eas>



TS-EAS on GitHub

<https://github.com/SAA-SDT>



EAD publication

<http://www.loc.gov/ead/index.html>



EAC publication

<https://eac.staatsbibliothek-berlin.de/>



Our mailing list

EAD@LISTSERV.LOC.GOV

Reporting an issue via SAA

<https://www2.archivists.org/standards/TS-EAS-report-an-issue>



Standards revision

Annual rolling revision cycle for minor releases

(see more on GitHub:

<https://github.com/SAA-SDT/TS-EAS-subteam-notes/blob/master/rolling-revision-cycle.md>)

Evaluate standards for potential major revision every five years following guidelines by SAA's Standards Committee (see more:

<https://www2.archivists.org/governance/handbook/section7/groups/Standards/Development-and-Review>)



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The major revision of EAD



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Overall timeline



Benefits of EAD 4.0



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Benefits of EAD 4.0

*Developed by and for cultural heritage
professionals around the world.*



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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 Call for Comments - The basics



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Find all information on the SAA website



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COMMENTS: REVISION OF ENCODED ARCHIVAL DESCRIPTION

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)

ABOUT TS-EAS

[Roster](#)
[Subteams](#)
[Handbook](#)
[Contact us](#)

TS-EAS AT WORK

[GitHub workspace](#)
[Submit an EAD or EAC-CPF issue or feature request via GitHub](#)
[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>



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Find all information on the TS-EAS GitHub page

The screenshot shows the GitHub interface for the repository **SAA-SDT / TS-EAS-subteam-notes**. The repository is public and has 3 forks and 8 stars. The navigation bar includes links for Code, Issues, Pull requests, Actions, Projects, Wiki, Security, and Insights. The left sidebar shows the file structure, with the **major-revision_2021-2025_documents** folder selected. The main content area displays the commit history for the **ead-subteam / major-revision_2021-2025_documents** path. A commit by **kerstarno** is shown, updating **README.md** (commit 685abf0, 4 days ago). Below this, a table lists the files in the directory and their commit history.

Name	Last commit message	Last commit date
..		
Editorial_ChangesInEAD4.0.pdf	Add files via upload	5 days ago
FromEAD3toEAD4.0_ChangesInTheSchema_EL...	Add files via upload	5 days ago
FromEAD3toEAD4.0_TransformationRoutes.pdf	Add files via upload	5 days ago
Infograph.pdf	Add files via upload	5 days ago
README.md	Update README.md	4 days ago

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



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How and where to start

- Believe us: we know that there is a lot to go through
 - And: there is even more to come
 - A draft Tag Library
 - New chapters to the [Best Practices Guide](#)
 - More examples
 - Why? We want to offer the information about the new version in different formats to - hopefully - enable all community members to contribute
- Furthermore: encoded standards work is detailed work
 - There are parts of our documentation that provide a general overview
 - But if you want to, you can dig deep

In short

- Start at the level, you feel most comfortable with
 - General
 - Detailed
 - Somewhere in between
- Wait until other types of documentation become available that might meet your needs better
- Remember: not every type of documentation will work in the same way for everyone, and not everybody will (need to) engage with everything to the same extent and at the same level

The Call for Comments - The documentation



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Currently available documentation on EAD 4.0

- Posts on the [Descriptive Notes](#) blog
- Editorial
- Revision notes
- The EAD 4.0 draft schema
- Transformation routes
- Changes in the schema
- Example files

The Descriptive Notes blog

- Series of five posts
 - Two have been published so far
- Introducing the general lines of the revision process and the new version
- Starting from the perspective of archival description
- Adding details on encoded archival description where suitable
- Keeping it light
- Providing links for further, more detailed reading and engagement

Shape the Future of EAD: A Call to Action – Part II

[#saadescription](#) • [April 27, 2024](#) • [Section updates](#) • [EAD: is-eas](#)



By Kerstin Arnold, Cory Nimer, and Mary Samouellan

In our [first blog post](#), we introduced you to the major revision of the Encoded Archival Description (EAD) standard. We gave an insider's look into the revision process, including why the standard is being revised, how it is being revised, and what actions you can take to participate. This post, the second in a series of five, examines the work that has been done to align EAD 4.0 with its sibling standard, [Encoded Archival Context – Corporate Bodies, Persons, and Families \(EAC-CPF\)](#).



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The Editorial

- Textual description of the **main aspects** of the **new version**
 - What were the drivers behind a change?
 - What did the change result in?
 - Providing an overview
 - Going into some more detail where necessary and useful
 - Linking to single GitHub issues including all the details
- Use the Table of Contents to navigate to the sub-chapter that interests you

Major revision of EAD

- [1. Introduction](#)
- [2. A general note to start with](#)
- [3. Alignment with EAC-CPF](#)
 - [3.1. Introduction of camelCase spelling](#)
 - [3.2. Aligning the definition of shared elements](#)
 - [3.2.1. <control>](#)
 - [3.2.2. Date elements <date>, <dateRange>, and <dateSet>](#)
 - [3.2.3. Elements to encode places and place names](#)
 - [3.2.4. <relations> and shared entity elements](#)
 - [3.2.5. In-line tagging for shared elements](#)
 - [3.3. Aligning the definition of shared attributes](#)
 - [3.3.1. Attributes for internal and external referencing](#)
 - [3.3.2. Other changes regarding attributes](#)
- [4. Describing various instances of a finding aid](#)
- [5. Relations and relationships](#)
- [6. Formatting and in-line tagging](#)
- [7. Additional changes for existing elements](#)

1. Introduction

The revision of the [Encoded Archival Description \(EAD\)](#) was approved by the Society of American Archivists' (SAA) Council according to the SAA's standards revision cycle at the end of 2020. The work of revising EAD is being carried out by a team of the Technical Subcommittee on Encoded Archival Standards (TS-EAS), a group supported by SAA and overseen by their Standards Committee. The EAD team has been working on the revision since early 2021 to the current date (end of February 2024), which has led to the creation of an initial draft for EAD 4.0.



The Editorial

Mentions the main elements relevant for a specific encoding aspect and explains what type of information they are meant to encode

Describes the encoding options as defined in the draft for EAD 4.0 by listing sub-elements and attributes and describing their use

3.2.3. Elements to encode places and place names

EAD 4.0 introduces the element `<place>` as a broader concept of encoding places, their names, roles, types, geographic location and further details ([#42](#)). `<place>` will require at least one of the following sub-elements to be present, though leaves it to the users of EAD to decide which of these they make use of: `<placeName>`, `<placeRole>` (e.g. place of creation or place of access), `<placeType>` (e.g. implementing the [feature codes used by GeoNames](#), such as "populated place" or "first-order administrative division"), `<geographicCoordinates>` (thereby elevated to being a sibling rather than a sub-element of the element used to encode the name of a place), `<address>` (for any physical address details), and the new element `<contact>` (for any digital contact details).

`<placeName>`, `<placeRole>`, and `<placeType>` all allow for a literal expression of the name, role or type of place, but also include the three new vocabulary attributes `@valueURI`, `@vocabularySource`, and `@vocabularySourceURI` (see more in sections [3.3. New optional attributes for internal and external referencing](#) and [5. Relations and relationships](#)). `<geographicCoordinates>` remains more or less unchanged, apart from the camelCase spelling and some new optional attributes. The new `<contact>` element has the same set-up as the existing `<address>` element with a `<contactLine>` sub-element and the only difference, that `<contactLine>` also allows for the linking attributes `@href`, `@linkRole`, and `@linkTitle`.

`<place>` will be available to its full extent within `<findAidDesc>` (see section [4. Describing various instances of a finding aid](#)) and `<relations>` (see section [5. Relations and relationships](#)), while `<placeName>` will be used in other contexts of EAD 4.0 instead of the element `<geogname>` of EAD3. Contrary to `<geogname>`, `<placeName>` will hold any literal text directly, without the sub-element `<part>`. Furthermore, the plural element `<places>` has been adopted from EAC-CPF and is available next to the other entity elements as described in section [5. Relations and relationships](#).

Includes links to relevant GitHub issues with more information

Includes links to other chapters of the editorial that describe related topics

The Revision notes

- Textual description of the **changes compared to EAD3**
 - Providing details of the revision
 - Explaining what has changed
 - Listing elements and attributes affected by a specific change
 - Grouping type of changes
 - Following the structure of an EAD instance for element-specific changes
- Use the Table of Contents to navigate to the sub-chapter that interests you

Revision notes

[Version control](#)

[Deprecated elements and attributes of EAD3](#)

[Spelling and naming of elements and attributes](#)

[List of removed, renamed or replaced elements and attributes](#)

[Elements](#)

[Removed elements](#)

[Replaced elements](#)

[Elements with camelcase spelling applied](#)

[Renamed elements](#)

[Attributes](#)

[Removed attributes](#)

[Attributes replaced by encoding from other namespaces](#)

[Replaced attributes](#)

[Attributes with camelcase spelling applied](#)

[Renamed attributes](#)

[List of new elements and attributes](#)

[New elements](#)

[New attributes](#)

[Common schema principles](#)

[Elements](#)

The Revision notes

Starts with a short introduction of the elements and/or attributes in questions

Explains how the elements and/or attributes work and where they come from (e.g. renamed EAD elements, adopted from EAC-CPF etc.)

Provides further information about the context in which the elements and/or attributes are available

Referencing external vocabularies, thesauri, or authority files

To support interoperability with linked data EAD 4.0 now includes the attribute group of

@valueURI, @vocabularySource and @vocabularySourceURI @valueURI replaces @identifier to avoid confusion with the general @id attribute mentioned above;

@vocabularySource replaces @source following the [TS-EAS design principle](#) #4, according to which the same name should not be reused for both an attribute and an element.

All three attributes of this group **have been adopted from and are shared with EAC-CPF**

They serve as optional attributes in all elements that can contain any kind of entity, identifier, code, role or type etc. where links to vocabularies, thesauri, or authority files might be useful. EAD 4.0 thereby extends the linked data support significantly from 16 to 52 elements.

EAD 4.0 elements with @valueURI, @vocabularySource, @vocabularySourceURI

accessConditions, agencyCode, agencyName, agent, agentName, agentRole, agentType, archDesc, c, c01 to c12, container, conventionDeclaration, formAvailable, legalStatus, localTypeDeclaration, maintenanceAgency, materialSpec, otherAgencyCode, otherFindAid, otherRecordId, physFacet, place, placeName, placeRole, placeType, publicationNote, referringString, relatedMaterial, relationType, rightsDeclaration, separatedMaterial, source, subject, targetEntity, targetRole, targetType, title, unitId, unitTitle, unitType, useConditions

The EAD 4.0 draft schema

- The technical expression of the draft for the new version of EAD
- Available in three file formats
 - .xsd
 - .nvdI (to combine EAD 4.0 and XHTML validation)
 - .rng (wrapped into the zip and tar.gz packages)
- Comes with a schematron for more specific validation

→ Download your preferred schema type or get the GitHub URL (e.g. [.xsd](#))

This release includes the following schemas for testing:

- ead-4-dev.xsd: This is the w3c XSD serialization of the EAD 4.0 draft schema.
- ead.nvdI: If you would like to experiment with the XHTML embedding options in EAD 4.0, start here. For more about NVDL, see https://en.wikipedia.org/wiki/Namespaced_validation_dispatching_language
- ead.sch: This is the draft version of the EAD 4.0 schematron, which we recommend using to ensure that machine-readable dates are encoded correctly.

To get started, rather than creating an EAD 4.0 file from scratch, we suggest that you copy the following EAD 4.0 test file, which is pre-associated with both the draft schema and schematron: https://raw.githubusercontent.com/SAA-SDT/EAS-Best-Practices/examples/_examples/ead4-call-for-comments/ead4-starter-file.xml

▼ Assets 5

 ead-4-dev.xsd	153 KB	3 weeks ago
 ead.nvdI	808 Bytes	3 weeks ago
 ead.sch	132 KB	3 weeks ago
 Source code (zip)		3 weeks ago
 Source code (tar.gz)		3 weeks ago



The EAD 4.0 draft schema - Option 1

- For the hand-coders and hands-on reviewers
- Open an existing EAD XML file (either EAD3 or EAD 2002) in your XML editor
 - Start with a short file first and maybe move on to a longer file in a next step if wanted
- Associate your EAD XML file with the EAD 4.0 schema, by changing from

```
<ead xmlns="urn:isbn:1-931666-22-9" xmlns:xlink="http://www.w3.org/1999/xlink"
      xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
      xsi:schemaLocation="urn:isbn:1-931666-22-9 http://www.loc.gov/ead/ead.xsd
      http://www.w3.org/1999/xlink http://www.loc.gov/standards/xlink/xlink.xsd"
      audience="external" relatedencoding="MARC21">
```

to

```
<ead xmlns="https://archivists.org/ns/ead/v4" xmlns:xlink="http://www.w3.org/1999/xlink"
      xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
      xsi:schemaLocation="https://archivists.org/ns/ead/v4
      https://raw.githubusercontent.com/SAA-SDT/eas-schemas/release_2024_03/xml-schemas/ead/ead-4-dev.xsd"
      http://www.w3.org/1999/xlink http://www.loc.gov/standards/xlink/xlink.xsd"
      audience="external" relatedencoding="MARC21">
```


The EAD 4.0 draft schema - Option 1

- Your XML editor will start showing you those elements and attributes in your existing file that do not conform to the new version
- Your XML editor will also show you what might need to be changed
- Follow the validation messages step by step, including comments about your changes, until you get to a valid EAD 4.0 file

```
<?xml version="1.0" encoding="UTF-8"?>
<!-- Downloaded on 22 April 2024 from https://www.riamco.org/render?eadid=US-RPD-02.10 -->
<ead xmlns="https://archivists.org/ns/ead/v4" xmlns:xlink="http://www.w3.org/1999/xlink"
  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xsi:schemaLocation="https://archivists.org/ns/ead/v4
  https://raw.githubusercontent.com/SAA-SDT/eas-schemas/release_2024_03/xml-schemas/ead/ead-4-dev.xsd
  http://www.w3.org/1999/xlink http://www.loc.gov/standards/xlink/xlink.xsd"
  audience="external" relatedencoding="MARC21">
  <eadheader audience="exte
    scriptencoding="iso15
    langencoding="iso639-
  <eadid countrycode="U
    511"
    0-02.10</eadid>
```

Validierung:

❗ Attribute 'relatedencoding' is not allowed to appear in element 'ead'.

The EAD 4.0 draft schema - Option 1

```
<ead xmlns="https://archivists.org/ns/ead/v4" xmlns:xlink="http://www.w3.org/1999/xlink"
  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xsi:schemaLocation="https://archivists.org/ns/ead/v4
    https://raw.githubusercontent.com/SAA-SDT/eas-schemas/release_2024_03/xml-schemas/ead/ead-4-dev.xsd
    http://www.w3.org/1999/xlink http://www.loc.gov/standards/xlink/xlink.xsd"
  audience="external">
  <!-- Changed eadheader to control and applied according changes to sub-elements and attributes;
    applied camelCasing; moved filedesc into findAidDesc; removed @relatedencoding -->
  <control audience="external" countryEncoding="iso3166-1" dateEncoding="iso8601" [46 lines]
  <findAidDesc href="02.10.xml" > [4 lines]
  <findAidDesc> [31 lines]
  <!-- Applied camelCasing and changes in names to <archDesc> and its sub-elements -->
  <!-- Removed @relatedencoding -->
  <archDesc level="collection" localType="inventory">
    <!-- Renamed -->
    <identificationData> [24 lines]
    <agents> [19 lines]
    <formsAvailable> [4 lines]
    <scopeContent> [7 lines]
    <!-- Changed @encodinganalog to @marc21:tag and added MARC21 namespace; applied formattingExtension -->
    <biogHist xmlns:marc21="http://www.loc.gov/MARC21/slim" marc21:tag="545"> [36 lines]
    <!-- <descgrp type="descriptive">
      <head>Collection information</head> -->
    <accessConditions xmlns:marc21="http://www.loc.gov/MARC21/slim" marc21:tag="506"> [3 lines]
    <useConditions xmlns:marc21="http://www.loc.gov/MARC21/slim" marc21:tag="540"> [5 lines]
    <preferCite xmlns:marc21="http://www.loc.gov/MARC21/slim" marc21:tag="524"> [2 lines]
    <scopeContent xmlns:marc21="http://www.loc.gov/MARC21/slim" marc21:tag="520"> [23 lines]
    <arrangement xmlns:marc21="http://www.loc.gov/MARC21/slim" marc21:tag="351"> [12 lines]
    <!-- </descgrp>
    <descgrp type="administrative">
      <head>Administrative information</head> -->
    <sourceOfAcquisition xmlns:marc21="http://www.loc.gov/MARC21/slim" marc21:tag="541"> [3 lines]
    <!-- </descgrp>
  </archDesc>
```

Manually adapted EAD 2002 XML file now valid against the EAD 4.0 draft schema

Note that adapting an EAD 2002 XML file will, by default, also require the changes that would already apply for a transformation to EAD3, e.g. changing from eadheader to control

The EAD 4.0 draft schema - Option 2

- For the technically well versed
- Search for an element of interest in the EAD 4.0 draft schema and compare its definition with the one in EAD3 or EAD 2002

```
<xs:complexType name="unitId" mixed="true">
  <xs:choice minOccurs="0" maxOccurs="unbounded">
    <xs:element type="ead:reference" name="reference"/>
    <xs:element type="ead:referringString" name="referringString"/>
    <xs:element type="ead:span" name="span"/>
  </xs:choice>
  <xs:attribute name="audience" type="xs:token"/>
  <xs:attribute name="id" type="xs:ID"/>
  <xs:attribute name="target" type="xs:IDREFS"/>
  <xs:attribute name="languageOfElement" type="xs:token"/>
  <xs:attribute name="scriptOfElement" type="xs:token"/>
  <xs:attribute name="localType" type="xs:token"/>
  <xs:attribute name="localTypeDeclarationReference" type="xs:IDREFS"/>
  <xs:attribute name="vocabularySource" type="xs:token"/>
  <xs:attribute name="vocabularySourceURI" type="xs:anyURI"/>
  <xs:attribute name="valueURI" type="xs:anyURI"/>
  <xs:attribute name="conventionDeclarationReference" type="xs:IDREFS"/>
  <xs:attribute name="maintenanceEventReference" type="xs:IDREFS"/>
  <xs:attribute name="sourceReference" type="xs:IDREFS"/>
  <xs:attribute name="countryCode" type="xs:token"/>
  <xs:attribute name="repositoryCode" type="xs:token"/>
  <xs:anyAttribute namespace="##other" processContents="lax"/>
</xs:complexType>
```

```
<xs:complexType mixed="true" name="unitid">
  <xs:group maxOccurs="unbounded" minOccurs="0" ref="m.phrase.basic"/>
  <xs:attributeGroup ref="a.common"/>
  <xs:attribute name="label"/>
  <xs:attribute name="type"/>
  <xs:attributeGroup ref="am.countrycode"/>
  <xs:attribute name="repositorycode" type="xs:NMTOKEN"/>
  <xs:attribute name="identifier"/>
  <xs:attribute name="encodinganalog"/>
</xs:complexType>
```

<unitId> in EAD 4.0 (left side) versus
<unitid> in EAD 2002 (right side)

The Transformation routes table

- Tabular and detailed overview of how a specific element needs to be transformed to get from EAD3 (deprecated) to EAD 4.0
 - Listing all EAD3 elements in alphabetical order and naming their EAD 4.0 equivalents
 - Providing a transformation route for each element, its content, and attributes
- Search for an the element of interest to see which changes would need to be applied to adapt it to EAD 4.0

conventiondeclaration	conventionDeclaration	Apply camelCasing Rename sub-elements abbr to shortCode and citation to reference Apply camelCasing to sub-element descriptiveNote Make sure sub-element reference comes first, followed by shortCode (if existing) and descriptiveNote (if existing)	Remove @encodinganalog and include a comment about the removal; if control or ead indicates a relatedencoding according to MARC21, add the MARC21 namespace and use the attribute @marc21:tag in conventionDeclaration to include the value of @encodinganalog (xmlns:marc21="http://www.loc.gov/MARC21/slim" marc21:tag="...") Remove @localtype and include a comment about the removal
-----------------------	-----------------------	--	--

The Changes in the schema table

- Tabular and detailed overview of how the definition of a specific element changes in EAD 4.0 compared to EAD3 (deprecated)
 - Listing all EAD3 elements in alphabetical order and naming their EAD 4.0 equivalents
 - If an element is replaced by or integrated with another and thereby removed from the EAD 4.0 schema, consult the Transformation routes table for more details
 - Also listing all new EAD 4.0 elements
 - Including some statistical counters e.g. about attribute groups and their usage across EAD 4.0 or about the coverage of specific content models
 - Linking to relevant GitHub issues that document these schema changes
- Search for an the element of interest to see how its definition changes in EAD 4.0 compared to its definition in EAD3 (deprecated)

The Changes in the schema table

- Less technical version of Option 2 for reviewing the EAD 4.0 draft schema
- Note that “removing” an element and attribute from the schema does not necessarily mean that there is no transformation route for it
 - Always check the Transformation routes table to get the full picture

function	function (referringString)	Y	Y	Y	Move function out of controlaccess, indexentry, and namegrp and make it an entity element within the plural functions element (note that if function is used as a mixed content element, an alternative transformation route to referringString applies, see Transformations tab for details) Adapt to content model of EAC-CPF Replace the required and repeatable sub-element part with the required and repeatable sub-element term Add an optional choice between date, dateRange, and dateSet Add placeName, targetType, targetRole, and relationType as optional and repeatable sub-elements Add descriptiveNote as optional, not repeatable sub-element Replace @identifier with @valueURI and @source with @vocabularySource Add @vocabularySourceURI Remove @rules (replaced by @conventionDeclarationReference) Remove @normal Remove @relator (replaced by targetRole) Remove @encodinganalog	#61 ; #68 ; #63 ; #69
	functions				Add functions Allow for the attributes as indicated in columns I to O and Q	

The Example files

- [ead4-starter-file.xml](#)
 - An EAD 4.0 file including all mandatory elements with some test information
 - Already associated with the .nvd1 schema and the schematron for validation
 - Use for some hand-coding to get a feeling for EAD 4.0 from scratch
- [LoC_EAD3exampleAdapted.xml](#)
 - An EAD3 file downloaded from the LoC catalogue on 24 January 2024
 - For the current version of the EAD3 source file, see:
https://findingaids.loc.gov/exist_collections/ead3master/mss/2003/ms003077.xml
 - Manually adapted to EAD 4.0 (same approach as in Option 1 for reviewing the EAD 4.0 draft schema)
 - Changes have been commented in the file itself
 - Review the comments to get an understanding of how a transformation to EAD 4.0 could look like
-

The Example files (EAD3 example adapted)

```
<!-- Moving <filedesc> out of <control>, renaming it to <findAidDesc> and adapting its content model -->
```

Comments on changes applied to an element (moving, renaming, etc.)

```
<!-- <filedesc> -->
<findAidDesc>
  <!-- <titlestmt>
    <titleproper encodinganalog="245$a" -->
    <!-- Adding @tag from the MARC21 namespace -->
    <title xmlns:marc21="http://www.loc.gov/MARC21/slim" marc21:tag="245$a">
      <part>National Woman's Party Records</part>
    </title>
    <!-- </titleproper> -->
    <!-- <subtitle> -->
    <!-- Adding @localType -->
    <title localType="subtitle" localTypeDeclarationReference="1TD1">
      <part>A Finding Aid to the Collection in the Library of Congress</part>
    </title>
    <!-- </subtitle> -->
    <!-- <author encodinganalog="245$c" -->
    <!-- Adding @tag from the MARC21 namespace -->
    <agent xmlns:marc21="http://www.loc.gov/MARC21/slim" marc21:tag="245$c">
      <agentName><!-- Prepared by -->Manuscript Division Staff</agentName>
      <agentRole>author (prepared by)</agentRole>
    </agent>
    <!-- </author>
  </titlestmt> -->
```

Removed elements are commented out (i.e. kept for reference)

Comments about new or alternative encoding options having been added

Some of these changes are only suggestions and there might be other ways, too

The Call for Comments - Submitting a comment



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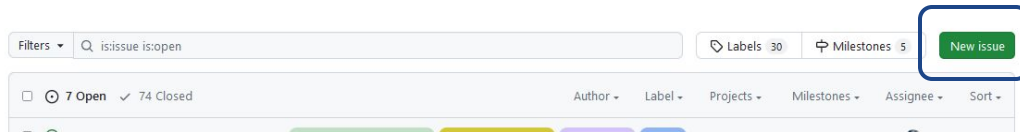
How you can contribute

There are three ways to contribute to the Call for Comments, i.e. three ways to submit a comment on the draft of EAD 4.0.

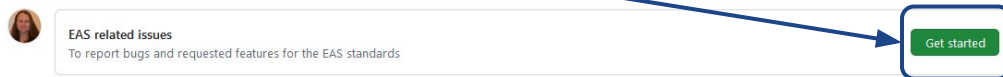
- Two formal options, if you want to **report a bug or request a feature**:
 - Submitting a comment on GitHub
 - Submitting a comment via our web form
- One informal option, if you have a **general comment or question**:
 - Sending us your comment via email

A comment submitted on GitHub

Go to <https://github.com/SAA-SDT/eas-schemas/issues> and click the button "New issue"



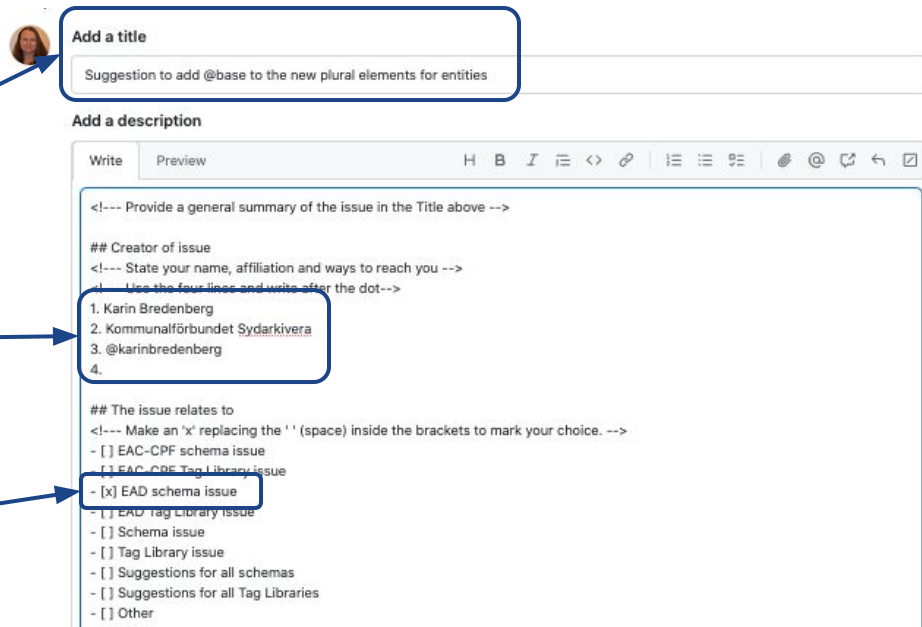
In the next step, click the button "Get started"



A comment submitted on GitHub

This will open our "New issue" template

- Make sure to add a title (otherwise you won't be able to save the issue)
- Add your name, your organisation, and some way to contact you like an email address or your GitHub name (in case we have follow-up questions)
- Use an "x" to replace the whitespace inside the brackets saying "EAD schema issue" (once you save the issue, this will be displayed as a checked check-box)



The screenshot shows the GitHub 'New issue' template interface. A blue box highlights the 'Add a title' section, which contains the text 'Suggestion to add @base to the new plural elements for entities'. A blue arrow points from the first bullet point of the list to this box. Another blue box highlights the 'Add a description' section, which contains a list of contact information: '1. Karin Bredenberg', '2. Kommunalförbundet Sydskånera', '3. @karinbredenberg', and '4.'. A blue arrow points from the second bullet point of the list to this box. A third blue box highlights the 'The issue relates to' section, which contains a list of options: 'EAC-CPF schema issue', 'EAC-CPF Tag Library issue', 'EAD schema issue', 'EAD Tag Library issue', 'Schema issue', 'Tag Library issue', 'Suggestions for all schemas', 'Suggestions for all Tag Libraries', and 'Other'. A blue arrow points from the third bullet point of the list to this box, specifically to the 'EAD schema issue' option which is marked with an 'x'.

Add a title

Suggestion to add @base to the new plural elements for entities

Add a description

Write Preview

<!-- Provide a general summary of the issue in the Title above -->

Creator of issue

<!-- State your name, affiliation and ways to reach you -->

Use the four lines and write after the dot-->

1. Karin Bredenberg
2. Kommunalförbundet Sydskånera
3. @karinbredenberg
4.

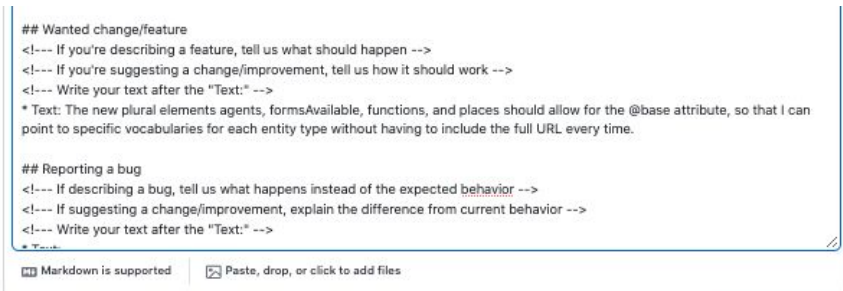
The issue relates to

<!-- Make an 'x' replacing the ' ' (space) inside the brackets to mark your choice. -->

- [] EAC-CPF schema issue
- [x] EAC-CPF Tag Library issue
- [x] EAD schema issue
- [] EAD Tag Library issue
- [] Schema issue
- [] Tag Library issue
- [] Suggestions for all schemas
- [] Suggestions for all Tag Libraries
- [] Other

A comment submitted on GitHub

- In the lower part of the template you will find various sections that allow you to describe the feature you want to suggest or the bug you have found
- These sections include pointers of what type of information you might want to include
- Not each of these sections will apply to the comment you would want to make - you can simply leave those sections empty
- The more precise or detailed you can be, the easier it will be for TS-EAS to address your comment
- Once you are content with your comments, click the "Submit new issue" button



Wanted change/feature

<!-- If you're describing a feature, tell us what should happen -->

<!-- If you're suggesting a change/improvement, tell us how it should work -->

<!-- Write your text after the "Text:" -->

* Text: The new plural elements agents, formsAvailable, functions, and places should allow for the @base attribute, so that I can point to specific vocabularies for each entity type without having to include the full URL every time.

Reporting a bug

<!-- If describing a bug, tell us what happens instead of the expected behavior -->

<!-- If suggesting a change/improvement, explain the difference from current behavior -->

<!-- Write your text after the "Text:" -->

Markdown is supported

Paste, drop, or click to add files

Submit new issue

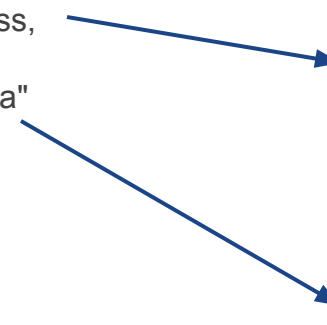
A comment submitted via our web form

Go to <https://www2.archivists.org/standards/TS-EAS-report-an-issue>

- You will find the same fields in this form as in the GitHub issue template
- Start with providing your name and email address, so that we can contact you in case of questions
- Then click the radio button next to "EAD Schema"

TS-EAS Report an Issue Form

Please complete the form below to report a bug or suggest a change.



Your Name: *

Email: *

Affiliation:

Issue Category: *

- ☐ EAC-CPF Schema
- ☐ EAC-CPF Tag Library
- ☒ EAD Schema
- ☐ EAD Tag Library
- ☐ Schema
- ☐ Tag Library
- ☐ Suggestions for all schemas
- ☐ Suggestions for all tag libraries
- ☐ Other



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A comment submitted via our web form

- In the lower part of the web form you will find the fields "Description" and "Details" to add a short statement or title for your comment and provide some more details about the feature you want to suggest or the bug you have found
- Following these fields, there are some more sections that allow you to add further details as applicable
- Once you are content with your comments, click the "Submit" button

Description: *

Suggestion to add @base to the new plural elements for entities

Brief description of the issue.

Details: *

The new plural elements agents, formsAvailable, functions, and places should allow for the @base attribute, so that I can point to specific vocabularies for each entity type without having to include the full URL every time.

For a bug, please tell us what happens instead of the expected behavior.
For change/feature request, explain the difference from current behavior.

Suggested Solution:

Suggest a fix/reason for bug or ideas about how to implement change/feature.

Steps to Reproduce (for Bugs):

Provide a link to a live example, or an unambiguous set of steps to reproduce this bug. Include code to reproduce if relevant.

Context:

How has this issue affected you? What are you trying to accomplish? Providing context helps us come up with a solution that is most useful in the real world.

Your Environment:

Your environment can be a clue to a bug. Include as many relevant details about the environment in which you experienced the bug (Version, Browser, OS, desktop/mobile, etc.)

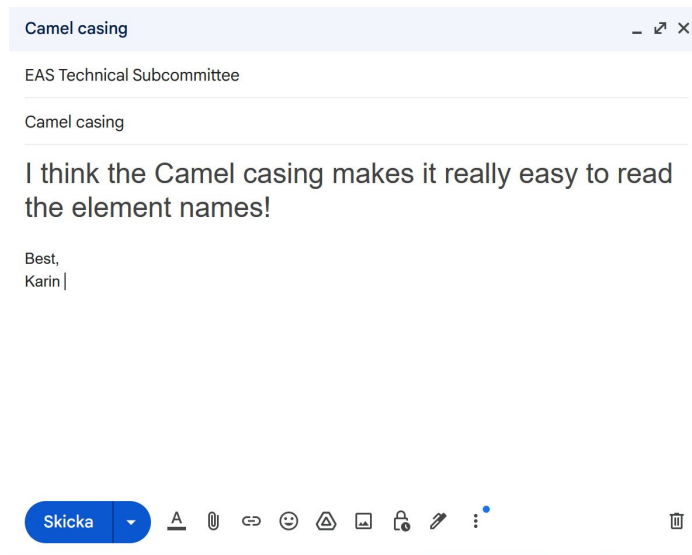
Submit



A comment sent via email

- For general comments or questions or any type of "I just wanted to say..." feedback, you can also send us an email at ts-eas@archivists.org

For a general recap on submitting a bug report or feature request see our ["How to..." video](#)



What happens next?

- Whichever way you have chosen to submit your comment, TS-EAS will let you know it's been received
 - On GitHub, we will simply comment on your issue and let you know the next steps
 - For submissions via the web form or email, we will reply to you via email
 - We will aim to do so within two weeks from when you submitted your comment
- All comments will be transformed into GitHub issues
 - This is our central hub for all aspects of the revision and internal management tool
 - We will add the issue to the "Major revision project", assign it to a specific milestone, add labels to indicate which part of EAD it refers to (e.g. <control> or <archDesc>) and at which stage it is (all issues will start under "Review")

What happens next?

- The EAD team of TS-EAS will review and discuss all comments submitted step-by-step during their monthly meetings (the last Friday of every month)
- Once decided, the GitHub issues will be updated with the decision and put into the next processing stage if confirmed
- If rejected, the update on GitHub will include the EAD team's reasoning and potentially an alternative solution
 - For comments submitted via the web form or email, we will provide this reasoning via email to you directly as well, so that you are kept in the loop

What happens next?

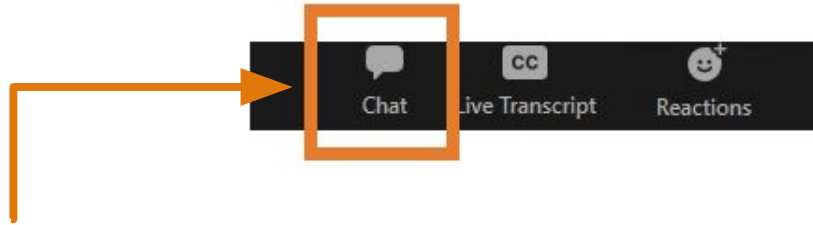
- While GitHub is our central tool, we will aim to provide an overview of comments received and their status in regular intervals also in a non-GitHub context
- Keep an eye on our page at the SAA website for news in this regard:
<https://www2.archivists.org/groups/technical-subcommittee-on-encoded-archival-standards-ts-eas/call-for-comments-revision-of-e-0>

Questions?



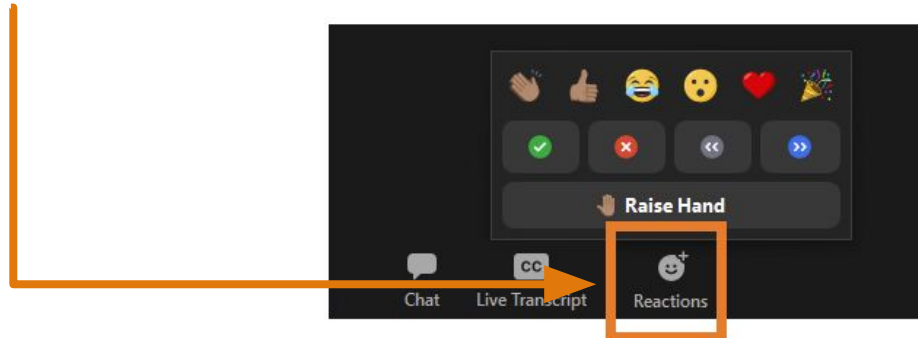
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Use **chat** for questions

Raise your hand to request to unmute



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

More Open Sessions as part of the Call for Comments
are planned on:

Wednesday, 22 May, 8am UTC

Tuesday, 18 June, 6am UTC

Tuesday, 9 July, 4pm UTC

Registration information will be shared the week commencing 29 April.



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