Steps for validating and importing EAD finding aids into CONTENTdm

Step 1: Encode EAD encoded finding aid using method (a), (b), or (c) below:

- a. Create new finding aids by entering data into the X-EAD template *The template encodes the data into XML and EAD (<u>Schema</u>).*
- b. Encode existing older legacy finding aids using EAD (<u>Schema</u>) and XML *Use a XML editor to check & validate XML encoding.*
- c. Convert old EAD 2002 DTD finding aids to EAD Schema.
 Finding aids encoded <u>before</u> 2008 probably were encoded using the EAD 2002
 DTD instead of the more recent Schema. *If this is the case, they need to be converted to the EAD Schema using an XML editor or other conversion method.*

Save the EAD Schema encoded finding aid files into a folder for use in Step 2.

Step 2: Validate all files to check EAD encoding

Check the EAD Schema finding aids using the BPG validator based on Berkeley's BPGilyzer. Go to <u>http://net.lib.byu.edu/umaead/uma_ead_bpgilyzer_0.9_setup.exe</u> to download the validator and save it to your desktop. This is what the icon looks like:



Double click on this icon to open it, then follow the steps given in the Validator's Wizard to install it; another icon (shown in fig. 2) will appear on your desktop after installation.



One at a time, click on the saved EAD finding aid files and drag each **into** the UMA EAD BPG validator icon (fig. 2) and wait while it validates. A black screen will open for a few seconds and then an error report (fig. 3) will appear. Repeat until all files are validated. Fix *errors marked in red* for each of the files before proceeding to Step 3.

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Figure 3: Error report

Step 3: Save all validated XML EAD files into one folder. Into this same folder, put a copy of the *ead_extract_to_dc.vbs file* (available from Nathan Pugh at University of Utah's Marriott Library).

Step 4: Double click on the *ead_extract_to_dc.vbs file* and wait a few seconds until a dialog box reports how many files were processed. Click **OK** when prompted. This step creates a tab-delimited spreadsheet in which the XML EAD fields from your EAD files are mapped to Dublin Core fields for ingestion by CONTENTdm.

Step 5: Import into CONTENTdm using the usual import procedures for importing tab-delimited files.

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a. Open Acquisitions Station and click Import, Multiple Files

- b. Select **Import using a tab-delimited text file** and use the **Browse** button to find the tab-delimited spreadsheet file created in Step 4 above. Click **Next**.
- c. Select the Import files from a directory and use the Browse button to find the folder that contains the XML EAD file(s) you wish to import. This should be in the same folder from which you obtained the tab-delimited file in (b) above. Click Next.

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d. Make sure the **Imported Fields** line up with corresponding **Collection Fields**, using the drop-down boxes to adjust the **Collection Fields** as needed.

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Before adjustment

After adjustment

e. Click **Next**, then **Finish**. The files should import and appear in the Acquisition Station Project window.

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f. More data can be entered into the metadata fields at this point if needed. When the record(s) are ready, click on the **Upload** button at the bottom right corner.

Step 6: Approve & reindex

- a. Once the records are uploaded, click on **Administration**, and **CONTENTdm Administration** to bring up the *Item Administration* menu.
- b. From the Item Administration menu, click Approve, then Approve all

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c. The approval process is finished when a red **Completed** appears.

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d. Click Index, then Start Index. Completion of the indexing will be indicated in red.

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Index	
Index the collection once you have added or deleted items, or changed metadata within a collection. Indexing may take several minutes. Wait for the completion message before accessing other administration pages.	
start inder	

The finding aids are now in the collection, ready for searching and viewing.

What a user sees in an EAD Finding Aids Collection:

During the CONTENTdm import process, two different products are created: a Dublin Core metadata record describing the finding aid and the XML EAD finding aid itself which has been converted by a XSLT stylesheet into an easy-to-read display.

A browse list of finding aids records in a CONTENTdm collection looks like this:



Clicking on a particular finding aid displays the XML EAD finding aid in an easy-to-read format according to specifications provided by a XSLT style sheet:

