

Instructions for Using Excel to Encode EAD v. 2002 Inventories

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Introduction

These instructions explain how to enter data into a spreadsheet that can be easily converted into an xml file encoded as the detailed description portion of an EAD inventory.

The steps below are useful for typists who have not learned EAD as well as for very quick data entry by those who do know EAD.

The steps that make up these procedures form a set of building blocks whereby any given step may be performed by any member of a processing team to produce a final EAD inventory.

For more specific guidelines regarding abbreviations, capitalization, punctuation, and date or quantity expressions, refer to the inventory style sheet.

Required Files

1. EAD2002.Excel.DataEntry.xlt

A spreadsheet template that is used to enter standard data about the contents of a collection.

2. EAD2002.Excel.Tagging.xlt

A second template that is used to automatically generate EAD tags when a completed data entry spreadsheet is pasted into it.

Note: Before you can use the EAD tagging template, the security level in Excel must be set to Low. See page 11 for details on how to change the security level.

3. EADExcelClean.vbcode.txt

A Visual Basic script that is used as a Word macro to delete tabs and clean up punctuation in the EAD tagging before the data can become an xml file.

Note: The Visual Basic script must be copied into a Word macro on the computer you are using.

4. EAD2002_template.xml

An EAD template that contains the most frequently used elements and boilerplate text for an EAD inventory.

Data Entry

Enter information about collection containers and content in the data entry template (*EAD.Excel.DataEntry.xlt*). Use a separate row to list each component in a collection.

As you enter data, rows may be inserted where needed.

If you wish to distinguish particular boxes or series, you may increase the width of a row or add a fill color, but do not enter any blank rows. Blank rows that are left in a data sheet will cause validation errors.

Data Fields

Column	Data	Descriptive Information
A	Locator	Shelf locations or call numbers: 12.A.1.1B +112 A2/ov5 M660 P1218 SAM27
B	Box Number	Box or other container numbers.
C	Container Type	Containers that are not boxes: "drawer" "folder" "reel" "tube"
D	Component Level	"series" or "subseries" or blank
E	Level 1 Title	Series or file title.

F	Level 2 Title	Sub-series or file title.
G	Level 3 Title	File or folder title.
H	Level 4 Title	Folder or item title.
I	Level 5 Title	Sub-folder or item title.
J	Date	Inclusive date range: Month DD, YYYY - Month DD, YYYY
K	Quantity	Number of folders or other type of material: 1 videocassette. VHS-C format.
L	Scope Note	Summary note describing scope and content.

Column A. Locator

EAD tag = <physloc>

Enter the shelf location or call number of a component whenever a location number changes from the previous row.

Column B. Box Number

EAD tag = <container>

Enter the box or container number of a component whenever a number changes from the previous row.

Leave this column blank when box or container numbers have not been assigned.

Column C. Container Type

EAD tag = <container type="x">

When the material you are describing is not contained within a box, enter the specific type of container. Enclose the type in quotation marks, e.g. "reel".

Column D. Component Level

EAD tag = <c0n level="x">

Data that is entered in Column D triggers how an inventory is displayed.

MHS uses three different tabular styles to display inventories. These different styles are used to express the complex hierarchy of the components within a collection.


Simple Collections

EAD tag = <c0r>

Collections that are very simple or that are very minimally listed are considered to be flat collections without a deep hierarchy.

A simple collection with a flat arrangement may be wholly listed at only one or two levels.

The example below illustrates how a collection with a very flat structure is displayed. In this example all the components were coded as Level 1 file titles.



Location	Box	
148.D.2.8F	6	Minneapolis Brewing Company: General Ledger, 1935-1960. Grain Belt Breweries, Inc.: Cash Receipts, 1973. Golden Grain Stock Certificates.
148.D.3.1B	7	Grain Belt Breweries, Inc.: Analysis of Accounts, 1975-1976. Minneapolis Brewing Company: Appraisal, 1962. 4 volumes. Storz Brewery, Omaha: Appraisal Report, 1972. Notes, 1927.
148.D.3.2F	8	Scrapbooks, 1933-1939; 1941-1947; 1945-1970. 8 volumes.
148.H.6.4F	9	Grain Belt Breweries: Ledger, 1971.

For simple collections, no component level is listed and Column D is left blank.

Location and box numbers are always given for the very first title that is listed and thereafter whenever a new location or box number is entered.

A simple collection of files described in two levels:

LEVEL 2 TITLE						
A	B	C	D	E	F	G
XYZ Association Records						
		CONTAINER TYPE Enter the type of container when the container is not a box. Enclose the type in quotation marks, e.g. "reel" or "folder"	COMPONENT LEVEL Enter "series" or "subseries" for highly complex descriptions -- when no physloc or container is recorded at the component level. Enclose the level in quotation marks.			
LOCATOR NUMBER	BOX NUMBER			LEVEL 1 TITLE	LEVEL 2 TITLE	LEVEL 3 TITLE
112.A.1.1B	1			Annual reports,		
				Articles of incorporation,		
				Bylaws,		
112.A.1.3B	3			Financial information:		
					Annual reports,	
					Audits,	
112.A.1.1B	1			Minutes,		
112.A.1.2F	2			Minutes,		

Collections with Series

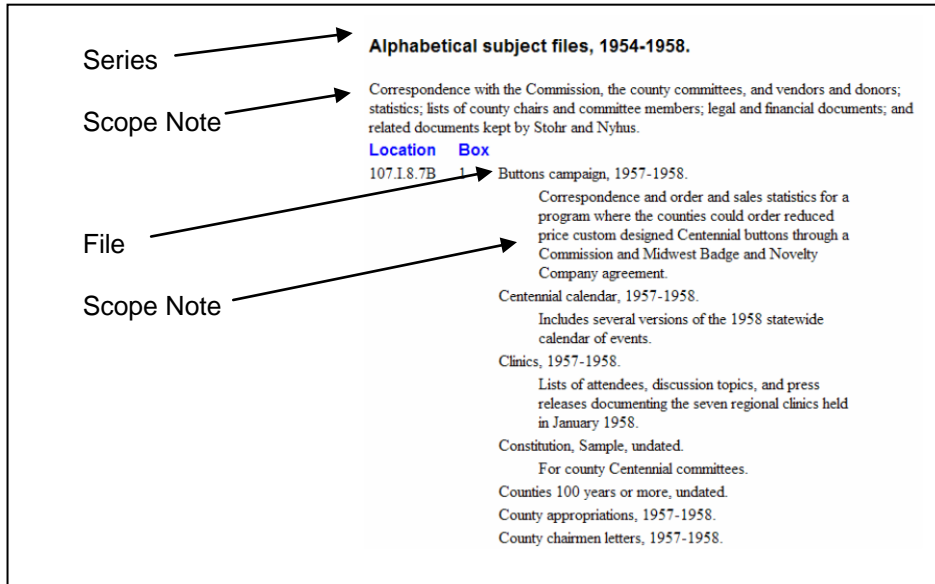
EAD tag = <c01 level="series">

Complex collections have parts that are organized into discrete series. Each series contains file sets that may or may not be further nested within the series.

A complex collection might evidence the following hierarchy:

- Level 1. Series title
- Level 2. File title
- Level 3. Folder title

The example below illustrates how a collection with series is displayed. Scope notes are included at both the series and file levels.



For complex collections, enter the word “series” in Column D. Use lower case and enclose the word “series” in quotation marks.

Enter the title of the series in Column E as a Level 1 title.

Do not enter a locator number in Column A or a box number in Column B. Location and container numbers are not entered until the next row down when a level 2 title is entered.

A collection with series and files:

Microsoft Excel - EAD2002.Excel.DataEntry1						
A	B	C	D	E	F	G
XYZ Association Records						
		CONTAINER TYPE Enter the type of container when the container is not a box. Enclose the type in quotation marks, e.g. "reel" or "folder"	COMPONENT LEVEL Enter "series" or "subseries" for highly complex descriptions -- when no physloc or container is recoded at the component level. Enclose the level in quotation marks.			
	LOCATOR NUMBER	BOX NUMBER		LEVEL 1 TITLE	LEVEL 2 TITLE	LEVEL 3 TITLE
2			"series"	Administrative Files:		
3					Articles of incorporation, Bylaws, Annual reports, Board of Directors:	
4	112.A.1.1B	1				Minutes,
5						Minutes,
6						
7						
8						
9	112.A.1.2F	2				

Collections with Series and Subseries

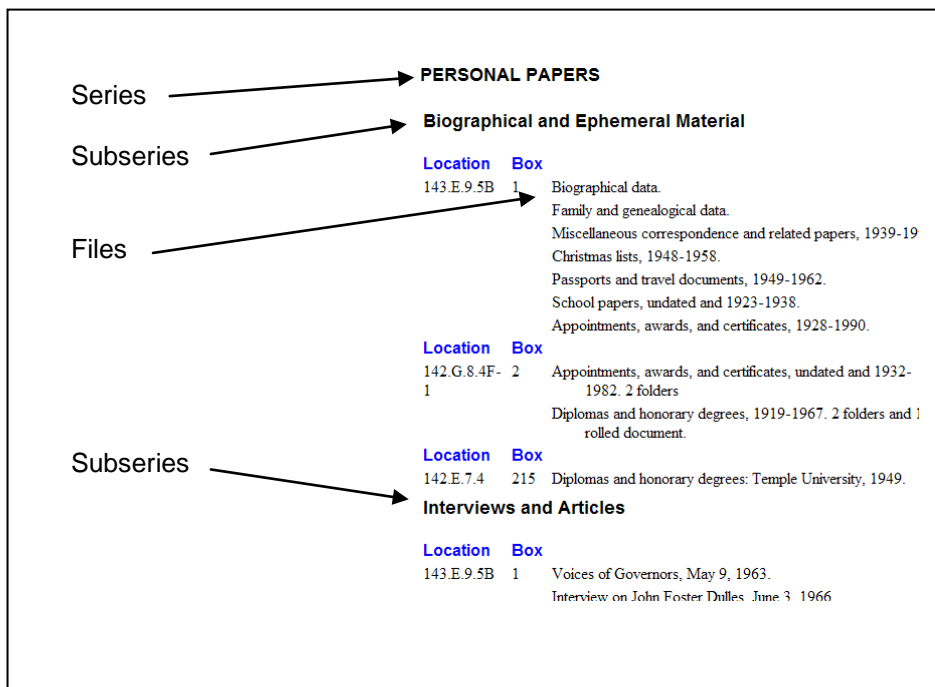
EAD tags = <co1 level="series">
<co2 level="subseries">

Components within a highly complex collection are arranged into groups of series. These series are further arranged into multiple subseries that contain more deeply nested file sets.

A highly complex collection may evidence the following hierarchy:

- Level 1. Series title
- Level 2. Sub-series title
- Level 3. File title
- Level 4. Folder title
- Level 5. Item title

The example below illustrates the style used to display a collection with series, subseries, and files.



To list collections with series and subseries, enter a series title as a level 1 title in Column E and enter the word “series” in Column D.

Enter the title of the subseries in the next row down as a Level 2 title in Column F. Enter the word “subseries” as the component level in Column D.

Do not enter locator and box numbers at either the series or subseries level. Location and box information is not listed until a level 3 title is entered.

A collection with series, subseries, and files:

The screenshot shows an Excel spreadsheet with the following data:

1	XYZ Association Records						
2	LOCATOR NUMBER	BOX NUMBER	CONTAINER TYPE	COMPONENT LEVEL	LEVEL 1 TITLE	LEVEL 2 TITLE	LEVEL 3 TITLE
3				"series"	Administrative Files:		
4				"subseries"		Board of Directors:	
5	112.A.1.1B	1					Annual reports,
6							Articles of incorporation,
7							Bylaws,
8				"subseries"			Minutes,
9						Executive Committee:	
10	M25	1-4	"reels"				Correspondence,
11	112.A.1.2F	2					Minutes,
12							Strategic plans,
13				"subseries"		Finance Department:	
14	112.A.1.3B	3					Annual reports,
15							Audits,
16							Profit and loss statements

Columns E-I. Level 1-5 Titles

EAD tag = *<unittitle>*

Enter each title within a collection in one of columns E-I. Each column corresponds to one of five hierarchical levels by which the components within a collection may be arranged and described.

Depending upon the complexity of the collection, determine which column to enter a title based upon that component’s place within the overall hierarchy of the collection.

Macros have been included to add EAD tagging for bold or italic face. To add the coding the macros must be invoked before a title data is entered.

To add **bold** face, press <ctrl>+<shift>+B. The macro will insert the following text: <emph render="bold"> </emph>. Enter the text you wish to appear in bold face between the opening and closing emphasis tags:

<emph render="bold"> [enter text here] </emph>.

To add *italics*, press <ctrl>+<shift>+I. The macro will insert the following: <emph render="italic"> </emph>. Enter the text you wish to appear in italics between the opening and closing emphasis tags:

<emph render="italic"> [enter text here] </emph>.

Column J. Date

EAD tag = <unitdate>

Enter the date or inclusive dates for each component part.

Months are spelled out, days and years are entered as Arabic numbers.

Example: March 29, 1931 – August 2, 1936.

Column K. Quantity

EAD tag = <physdesc>

Use column H to describe the number of folders, volumes, sound recordings, motion pictures or other material type that comprise each component part.

Examples:

28 folders.

15 volumes and 6 folders.

12 videocassette recordings. VHS. User copies.

1 motion picture reel : sound, color ; 16 mm. Master copy.

Column L. Scope Note

EAD tag = <scopecontent><p>

Scope notes are intended to be sparingly used and concisely stated. The note may be used to note particular content, to indicate gaps, to highlight restrictions, to describe how the files are arranged, or to describe peculiar chains of custody.

Examples:

This series contains information regarding...

Issues missing.

Missing 1956, 1979-1982, and 1985.

Access restricted until January 1, 2025.

Arranged alphabetically and there under in reverse chronological order.

These files are copies of original material held by the Jimmy Carter Presidential Library, National Archives and Records Administration, Atlanta, Georgia.

Proofreading Note:

Information entered into this column is always tagged as `<scopecontent><p>`. When an inventory is proofed for final EAD tagging, processors may need to recode these xml tags in order to properly identify the metadata as another EAD element.

In particular, `<scopecontent>` tags that identify notes regarding access restrictions `<accessrestrict>`, use restrictions `<userrestrict>`, arrangement `<arrangement>`, or custodial history `<custodhist>` must be recoded.

EAD Data Tagging

The steps below use a sequence of copy and paste functions that use several Excel, Word, and xml files one after the other. To complete the steps you will open two files in Excel, one file in Word, and one xml file.

Files may be saved at any step in the process.

Steps 1-6 explain how to use the tagging template to automatically add EAD tags to the inventory data.

Steps 6-9 are performed in both Excel and Word in order to clean up extra formatting that was added to the data.

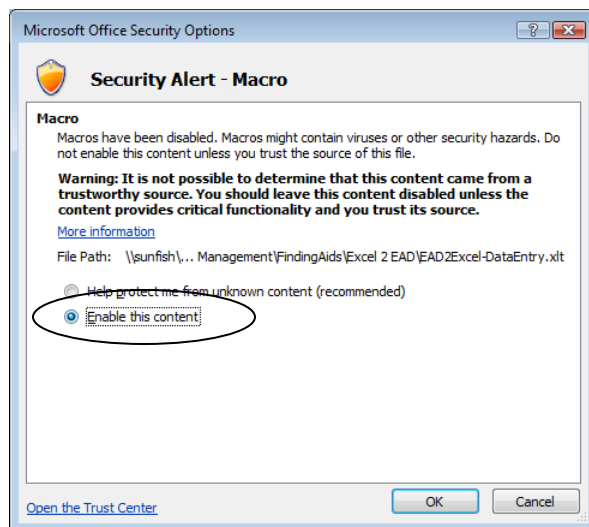
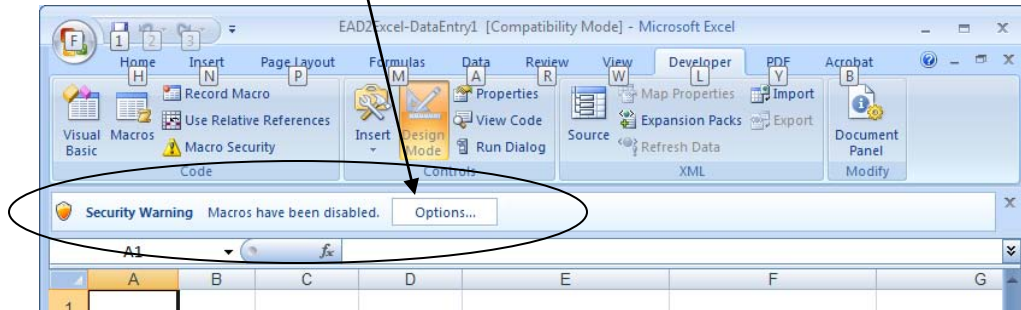
Steps 10-12 may be performed in either an xml editor (Xmetal or Oxygen) or a text editor (Notepad or Word) in order to produce an xml file.

Steps 13-15 are quality assurance steps that are taken to verify that the data is properly coded as EAD.

Steps 1-6. EAD Tagging Template

For the formulas in the EAD Tagging Template to be used, a macro in the template must be enabled.

To enable the macro, select the Options button that appears in the Security Warning message bar.

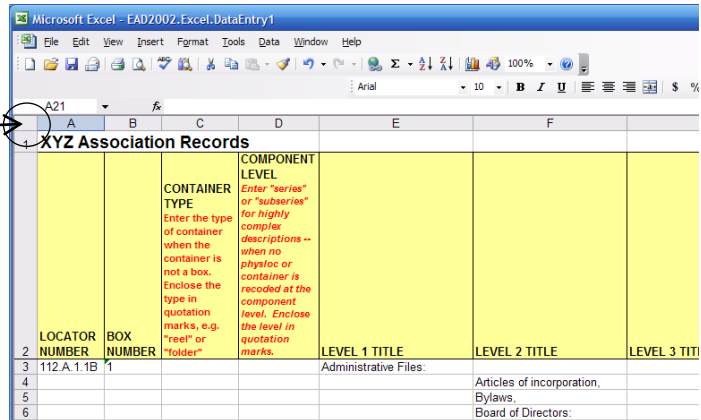


Enable the content and click OK.

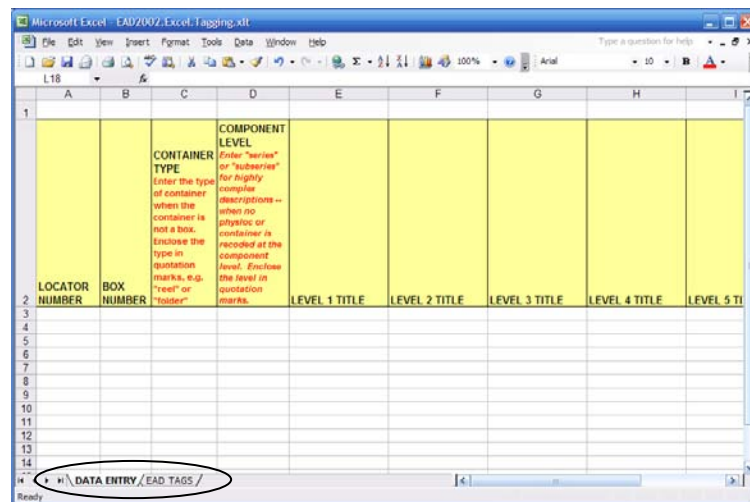
1. Open the data entry spreadsheet that contains the inventory.
2. Copy the entire worksheet.

Press **<ctrl>+a**
or click in the
upper left-
hand corner
to select the
worksheet.

Press **<ctrl>+c**
to copy the
sheet.



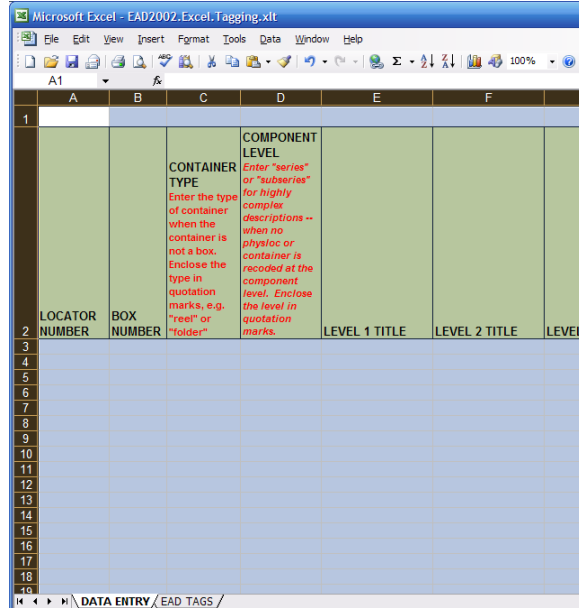
3. Open a blank EAD tagging template. Notice that there are two worksheets in the tagging template: one called Data Entry and a second called EAD Tags.



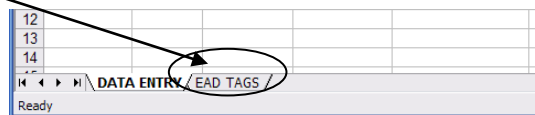
4. Paste the box list into the DATA ENTRY worksheet of the tagging spreadsheet.

When the tagging template is opened, the Data Entry worksheet has already been selected.

To paste in the data, press <ctrl>+v.



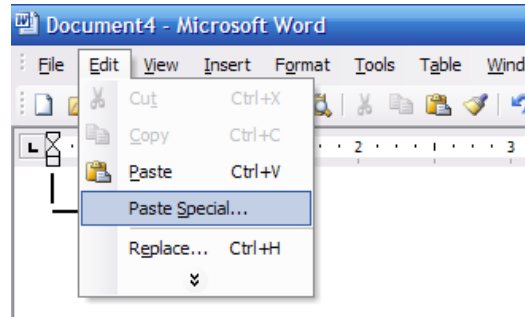
- Click on the second tab at the bottom of the screen to open the EAD Tags worksheet.



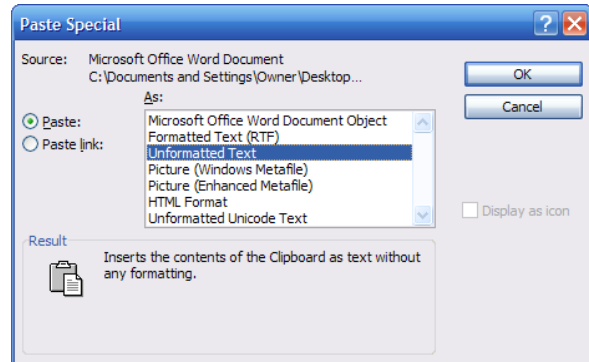
Steps 6-9. EAD Excel Clean Template

- Select all the tagged cells that contain inventory data. (Use the mouse, hold down the <ctrl> + <shift> keys, press the right arrow key, then the down arrow key.)
- Open a blank Word document.
- Paste special* the copied EAD Tags into the Word document as unformatted text.

a. Select *Edit* → *Paste Special*.

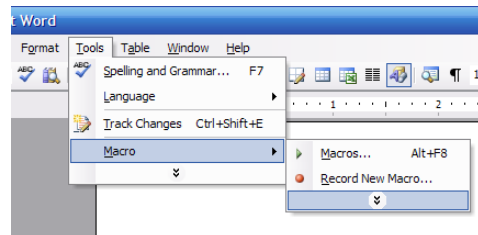


b. Select *Unformatted Text* and click *OK*.

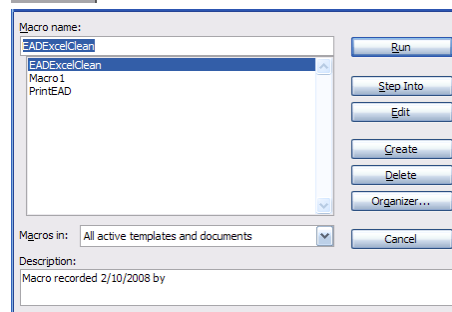


9. Select *Tools* → *Macro* → *Macros* → *EADExcelClean* → *Run* to execute the macro that cleans up the data. The macro will strip out the tabs and cleans up some common punctuation errors.

Select *Tools* → *Macro* → *Macros*



Select *EADExcelClean* → *Run*



At this point, the data may be saved as an EAD fragment with either a *txt* or *xml* file extension.

Steps 10-13. XML Template

10. Open the EAD fragment that resulted from step 10 above, select the entire text and copy it.
11. Next, open an EAD template or existing EAD file and paste in the fragment.
For new inventories, simply go to the end of the detailed description by searching for the text “</dsc>” and paste the EAD fragment into the template immediately before the closing “</dsc>”.
For existing EAD files, insert the xml fragment in its proper place within the detailed description.
12. Save the xml file.

Steps 13-15. Proofread for Data Quality

13. Proofread your resulting EAD file and recode any <scopecontent> notes that should be properly tagged as other EAD elements such as <accessrestrict> or <userrestrict>.
14. Correct any xml validation errors that resulted from leaving blank rows in a data entry sheet.
15. For collections with components whose levels were tagged as series and subseries, proofread the inventory to verify that locator and box numbers will appear in the html version of the inventory where they are needed.