

HDMS Finding Aids

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The Heritage Documentation Management System, version 7.5 features a wizard to produce EAD and HTML finding aids for the records documented in the database.

EAD Finding Aids

The HDMS Finding Aid wizard can produce an Encoded Archival Description (EAD) finding aid in either SGML or XML. For information about the mapping of HDMS fields to EAD tags see the document *HDMS Application Guidelines for EAD*. A report on the project to create an EAD finding aid generator for the HDMS is also available, see the document *REEA - HDMS EAD Report*.

The aim of the EAD generator for the HDMS is to provide a basic SGML or XML EAD finding aid. The SGML finding aid produced may be uploaded into an appropriate SGML viewer, and the XML finding aid can be viewed, via an XSL stylesheet in an XML enabled browser, i.e. Internet Explorer 5. Thus, not all fields in the HDMS are output to EAD, nor are all the possible mappings of HDMS fields to EAD used. The aim is to strike an appropriate balance, and produce a structured finding aid, that is not 'overloaded' with data, nor is 'too large' to be delivered over the web.

An XSL stylesheet for use with Internet Explorer 5 is provided, namely `hdmsIE5.xsl` in the `ead/xml` directory. The namespace that IE5 supports at the moment is `<xsl:stylesheet xmlns:xsl="http://www.w3.org/TR/WD-xsl">` which is an earlier working draft of the currently accepted one `<xsl:stylesheet xmlns:xsl="http://www.w3.org/1999/XSL/Transform">`. Hence you will find that this stylesheet does not work with processing tools like James Clarke's `vt.exe` which are based on the later namespace. The stylesheet has also been designed to deal specifically with HDMS EAD output - it is not robust enough to deal with all possible EAD variations.

HTML Finding Aid

The format of the HDMS HTML finding aid is illustrated at the right and consists of

Home Page - title page, table of contents (with links to all other pages), location of the records and contact information.

How to Use this Guide - structure of the guide and advice on how to browse and search.

About the Records - statistical information about the records for an overview of the size, extent, date range etc of the collection, scope and content note and processing information.

Provenance - summary provenance descriptions and full descriptions (if desired).

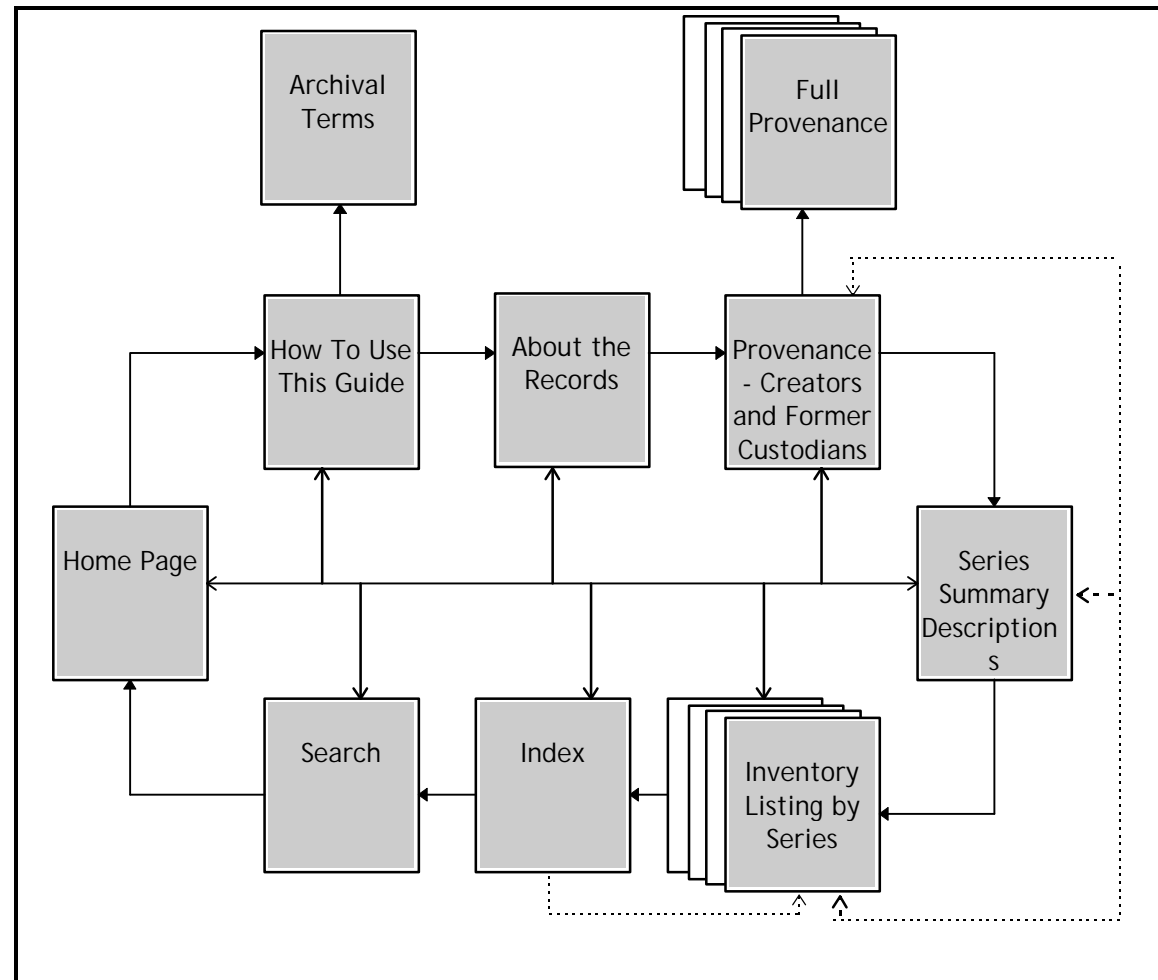
Series - summary series descriptions.

Inventory Listing by Series - the inventory for each series is listed on a separate page with a summary series description.

Index - a 'back of book' style index to the inventory listings (requires indexing terms to have been established and indexing profiles run).

Search - if your web setup allows search facility for the finding aid. Paste the search form into the search page template.

The pages are linked by previous, next and home buttons at the top of the page, with links to Home, Series, Provenance, Search (where applicable) and Index (where applicable) at the bottom of each page.



Step 1: Input Title, Creator, Copyright, Language and URL Details

This first step sets up the metadata and title information. It is used in the <eadheader> and <front matter> tags in the EAD finding aid and in the head and metadata tags of the HTML pages.

Title	Title of the finding aid, defaults to <i>Orgid Guide to Records</i> . <ul style="list-style-type: none"> EAD - used in the <titleproper> tag HTML - used in the <title> tag on all the pages. Also used in DC.Title metadata tag. Also displayed at the top of each page.
Creator	Organisation or person creating the finding aid. <ul style="list-style-type: none"> EAD - used in <author> tag, i.e <author> Listed by FindingAid![Prepby] for FindingAid![Creator]</author> HTML - used in DC.Creator metadata tag.
Copyright	Copyright statement for the finding aid. <ul style="list-style-type: none"> EAD - used in a <p> tag in the <frontmatter><titlepage> tag HTML - used for the DC.Rights metadata tag.
Language	Language of the Finding Aid itself. <ul style="list-style-type: none"> EAD - used in a <language> tag of the <frontmatter><profiledesc><language> tag. HTML - used for the DC.Language metadata tag.
URL	The web directory of the finding aid. Note the filenames are added by the generator. <ul style="list-style-type: none"> HTML - Used in DC.Identifier tag.

Step 2: Input Publication Details

Publication details are used in the publication tags of EAD and in the footer at the bottom of each of the HTML pages. It covers information about when, where and by whom the finding aid is published, as well as when created and last modified.

Note that the URL/email fields are optional and that the links may be URLs, emails or relative references.

Supporters of the processing of the records and publication of the finding aids are recorded in the sponsors table. A sponsor sentence generated from this table is generated for the EAD and HTML finding aids, with links to their Web home pages if available.

Published by	The name (and link) to the home page of the publishers of the finding aid. <ul style="list-style-type: none"> EAD - used in the <publisher> tag. HTML - used in the DC.Publisher tag, displayed in the footer.
Published on	The name (and link) to the home page of the site on which the finding aid is published. <ul style="list-style-type: none"> HTML - displayed in the footer.
Publication Date	Date of publication <ul style="list-style-type: none"> EAD - used in <date> tag of <publicationstmt> and <titlepage> HTML - displayed in the footer.
ISBN	Any ISBN, ISSN or other publication code. Not used in the production of the finding aids at this stage.
Prepared by	The name (and URL/email) of the people who processed the records. <ul style="list-style-type: none"> EAD - used in the <author> tag, i.e. <author> Listed by FindingAid![Prepby] for FindingAid![Creator]</author> HTML - displayed in the footer, used in the DC.Contributor tag.
Updated by	The name and URL/email of the person who last updated the finding aid. Not used in the production of the finding aids at this stage.
Date Created	The date the finding aid was first created. <ul style="list-style-type: none"> HTML - used in the DC.Date.Created tag
Date Modified	The date the finding aid was generated. This will default to the system date of the PC on which the finding aid is being created. <ul style="list-style-type: none"> EAD - used in the <profiledesc><creation> statement HTML - used in the DC.Date.LastModified tag and displayed in the footer.

HDMS Finding Aid Wizard

2. Input Publication details

Published by: Australian Science and Technology Heritage Centre

Home Page: http://www.austehc.unimelb.edu.au/

Published on: AustehcWeb

Home Page: [Empty]

Published Date: May 1999 ISBN No: [Empty]

Prepared by: Andrea Barnes and Joanne Evans

Email/URL: [Empty]

Updated by: Joanne Evans

Email/URL: joanne.evans@asap.unimelb.edu.au

Date Created: Monday, 6 September 1999

Date Modified: Saturday, 1 July 2000

Sponsors

Buttons: Cancel, <Back, Next>, Finish

Click to input sponsors of records processing and publication of finding aid

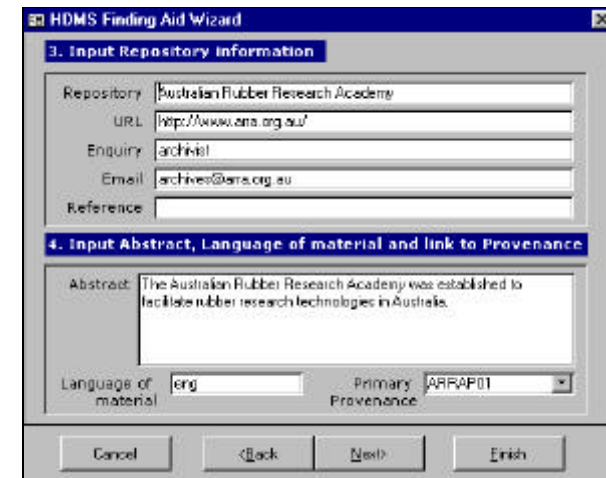
For sponsors, their name and optional Web page address and relative link to a logo or other image can be recorded. For the EAD finding aid, a comma separated list of sponsors is output in a <sponsor> tag with the stylesheet displaying as a sentence, i.e. *With the support of <sponsor>*. For the HTML finding aid, the sponsors and their images are displayed on the front page with links to their Web page. The sponsor sentence also appears in the footer of the HTML pages.



Step 3: Input Repository Information

Repository information records the repository at which the records are located and managed, with the URL and the person towards whom enquiries should be made. As the finding aids are to be published on the Web, an email contact for communication is required. The reference number of the collection of records is also recorded.

Repository	Name of the repository which manages the records. <ul style="list-style-type: none"> EAD - used in the <archdesc><did><repository> tag. HTML - displayed on the front page.
URL	Url of the repository. <ul style="list-style-type: none"> HTML - used as a link on the front page.
Enquiry	Contact person at the repository - may be a name or position <ul style="list-style-type: none"> HTML - displayed on the front page.
Email	Email of the contact person at the repository. <ul style="list-style-type: none"> HTML - displayed as a <a href="mailto:" ref on the front page.
Reference	Repository reference for the collection, e.g. manuscript or collection number. <ul style="list-style-type: none"> EAD - used in the <EADID> tag and <archdesc><did><unitid> tag.



Step 4: Input Abstract, Language of Material and link to Provenance

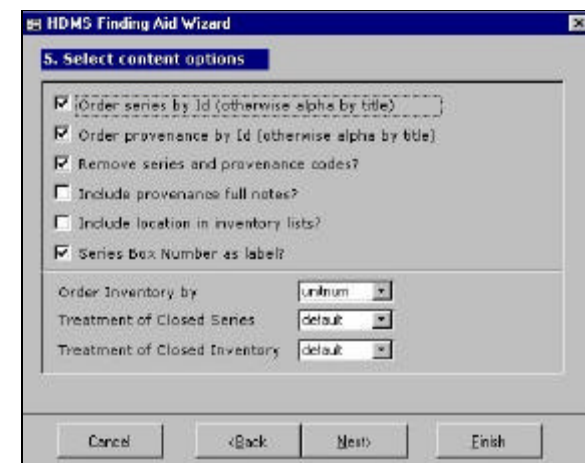
Abstract	Summary statement about the collection. <ul style="list-style-type: none"> EAD - used in the <archdesc><did><abstract> tag.
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	<ul style="list-style-type: none"> HTML - displayed on the front page and about the records page .
Language of Material	<p>The language of the material in the collection.</p> <ul style="list-style-type: none"> EAD - used in the Langmaterial attribute of the <archdesc> tag.
Primary Provenance	<p>Select provenance id for the primary provenance.</p> <ul style="list-style-type: none"> EAD - name and dates of primary provenance is used in the <archdesc><did><originator> tag with the id as the target attribute of a <ref> tag. HTML - names and links the provenance on the about the records page.

Step 5: Select Content Options

Various options are allowed relating to the content of the finding aid as drawn from the ASPI tables of the HDMS.

Order series by id	Tick to order series by ID, otherwise series will be ordered alphabetically by title.
Order provenance by id	Tick to order provenance by ID, otherwise provenance will be ordered alphabetically by title.
Remove series and provenance codes	Display Series and Provenance IDs without code or leading zeros.
Include provenance full notes	Provenance full notes are included. In the HTML guide a separate page for each provenance is created with links to related provenance and series.
Include location in inventory lists	Includes the location of the container in which the inventory item is located as per the locations table.
Series box number as label	Displays 'Series Box Number' rather than 'Box Number' in inventory list.
Order inventory by	Choice of unitnum (sequence), inventory ID, dates or title.
Treatment of closed series	Choice of default, include, exclude: <ul style="list-style-type: none"> Default - does not include inventory list of closed series. Include - includes inventory list of closed series. Exclude - does not include closed series in any output.
Treatment of closed inventory	Choice of default, include, exclude: <ul style="list-style-type: none"> Default - Only title and date closed until displayed in inventory list.



- Include - Full inventory displayed.
- Exclude - does not include closed inventory items in any output.

Step 6: HTML Options

In this step the options for the HTML finding aid are specified. The HTML finding aid also includes an index and photo gallery. The index is automatically generated if the indexing module of the HDMS has been used. Information about the images for a photo gallery page are recorded in the HTMLPHOTOS table.

Home page	Name of home page of the HTML finding aid.
Body colours	Attributes for the body tag - including bgcolor, link, alink, vlink e.g. <code>BGCOLOR="#FFFFFF" LINK="#0000D9" VLINK="#808080" ALINK="#800000"</code> .
Sidebar colour	Colour for side bar on HTML finding aid pages.
Sidebar pixel width	Width in pixels of sidebar - defaults to 90 pixels. If null, then the width of the side bar is determined by the width of the picture/logo.
Picture	Relative reference to the image file to display in the top left hand corner of each HTML page.
Picture width	Width in pixels of the picture image.
Picture height	Height in pixels of the picture image.
Arrow - Previous	Relative reference to the previous arrow image.
Arrow - Next	Relative reference to the next arrow image.
Arrow - Search	Relative reference to the search arrow image.
Background	Relative reference to background image for HTML pages (optional). Care must be taken to ensure that the background image does not make it difficult to read the text.
Search page	Name of search page - a template will be created into which the search form for your search facility may be inserted. If blank then no search page is created and the search image is not displayed on any of the html pages.

The screenshot shows the 'HDMS Finding Aid Wizard' dialog box at step 6, 'HTML Options'. The fields are as follows:

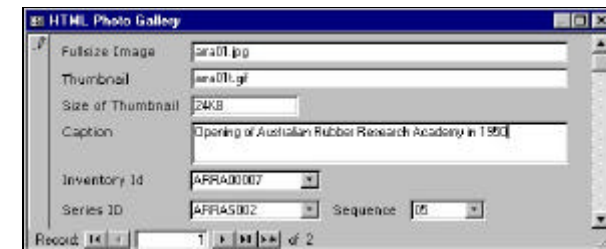
- Home page:** arra.htm
- Body colours:** BGCOLOR="#FFFFFF" LINK="#0000D9" VLINK="#808080" ALINK="#800000"
- Sidebar colour:** #66CCFF
- Sidebar pixel width:** 80
- Picture:** gifs/arralogo2.jpg
- Width:** 80
- Height:** 90
- Arrow - Previous:** gifs/left.gif
- Arrow - Next:** gifs/right.gif
- Arrow - Search:** gifs/search.gif
- Background (optional):** (empty field)
- Search Page (blank for none):** search.htm
- Include a list of series on provenance pages?:**

Buttons at the bottom include 'Cancel', '<Back', 'Next>', and 'Finish'. A 'Photo Gallery' button is located on the right side of the dialog.

Include a list of series on the provenance pages	Option to include a listing of series under each provenance entry on both the provlist page and the individual provenance pages (if include full note for provenance also ticked).
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Clicking on the Photo Gallery command button allows the input of information about images to create a photo gallery page for the HTML finding aid. A thumbnail of the image is displayed, with caption and link to the inventory item from which it came. Clicking on the thumbnail goes to a larger version of the image.

Fullsize image	Relative reference of fullsize image file.
Thumbnail	Relative reference of thumbnail image file.
Size of thumbnail	Size of thumbnail - used in alt tag so users can see how large the image file is.
Caption	Caption to appear beneath the thumbnail image.
Inventory ID	Select inventory item from which the image came - Series ID and Sequence will be automatically completed.
Series ID	Series from which the image came - automatically completed on selection of Inventory ID.
Sequence	Sequence (unitnum) of the inventory item - automatically completed on selection of Inventory ID.



Austehc uses the following protocols for creating images for the photo gallery:

- 1 Scan the image and save a high resolution copy in TIF format for reference and further manipulation, that is, without adjusting height/width ratios or resolution.
- 2 To create the full size image, open the high resolution image and adjust height/width ratios by at least 50% (experiment with how it looks and loads on the Web - the image should be no bigger than a screenful). Save as a gif or jpg depending on type of image. The recommended protocol for naming the full size image is ID[a..z].EXT, where ID is the INVENTORY ID of the item to which it relates, a..z to distinguish between multiple images for the same item and EXT as the appropriate extension for the file format.
- 3 To create the thumbnail image, open the high resolution image, adjust height/width ratios to create an image no more than postage-stamp-size (experiment with how it looks and loads on the Web). Save as a gif or jpg depending on type of image. The recommended protocol for naming the thumbnail image is IDg[a..z]t.EXT, where ID is the INVENTORY ID of the item to which it relates, g for gallery, a..z as per above, t for thumbnail and EXT as the appropriate extension for the file format.

Step 7: EAD Options

Options relating to the EAD finding aid are input here. This includes the location of the dtd and xsl stylesheet, and content for the <eadid> and <archdesc> EAD tags.

SGML EAD file	Name of SGML EAD file to create.
XML EAD file	Name of XML EAD file to create.
Include XSL stylesheet	Tick to include link to xsl stylesheet in XML output - i.e. <?xml-stylesheet type="text/xsl" href="Ead![XSLfile]"?>".
XSL file	Relative reference to the XSL file.
DTD location	Relative location of SGML dtd.
XML DTD location	Relative location of XML dtd.
Entity declarations	Any entity declarations.
Country code	Country code e.g. AU - Australia, for <eadid> tag.
Org code	Organisation code for <eadid> tag.
Finding aid status	Choice of unverified-partial-draft, unverified-full-draft, edited-full-draft or edited-partial-draft.
Audience	Choice of internal or external.
Level attribute for <archdesc> tag	Choice of collection, fonds, recordgrp, series, subgrp, subseries, otherlevel.

Step 8: Specify directory, type and check metadata

The final step specifies the directory in which to create the finding aids, what type of finding aids to create and checks the metadata.

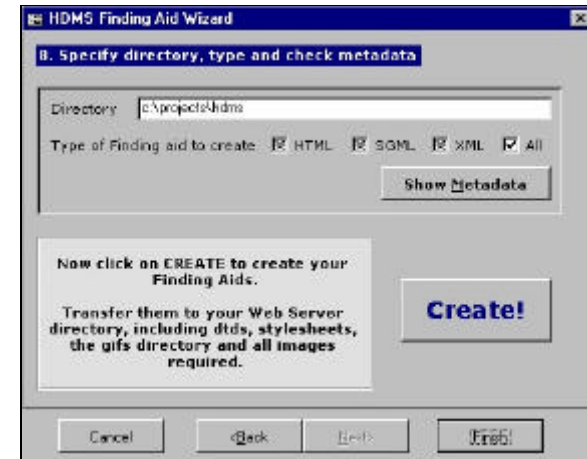
Directory	Directory in which to create the finding aids.
Type of finding aid to create	All - creates all, otherwise tick the ones that you want.

Click on **Show metadata** to view the metadata that will be included in the <head> tag of the HTML finding aid and as a comment in the EAD finding aid. Note that the metadata is automatically updated by changes to information in the wizard - e.g. title, publisher, dates etc. Note however that if changes are made to the metadata, these are not automatically updated in the wizard.

Dublin Core is used as the default metadata set, but any others can be added, e.g. AGLS, EDNA, for internal use, for search engine indexing etc.

The metadata table has the format:

- Name The name of the metadata tag.
- Scheme Standard/method that indicate how the element value is encoded.
- Lang The language of the tag, defaults to "en".
- Content The metadata tag.
- Ref A note field to indicate a reference for the tag.



NAME	SCHEME	LANG	CONTENT
DC: Title		en	Australian Rubber Research Academy Guide
DC: Creator		en	Australian Science and Technology Heritage
DC: Subject		en	publications, guide, records, Australian Rub
DC: Description		en	The Australian Rubber Research Academy a
DC: Publisher		en	Australian Science and Technology Heritage
DC: Contributor		en	Andrea Barnes and Joanne Evans
DC: Date Created	ISO6601	en	1999-09-06
DC: Date LastModified	ISO6601	en	2000-07-01
DC: Type		en	Document
DC: Format	HTML	en	text/html
DC: Identifier	URL	en	http://www.ars.org.au/archives
DC: Source		en	
DC: Language	ISO639	en	en-gb
DC: Relation		en	

Click on **Create** or **Finish** to generate the finding aids. If required you may further edit your finding aids generated from HDMS. If you need to make changes to satisfy your style guidelines then see if you can automate the process by recording macros or the like in your HTML/SGML/XML editor.

Things to get together before finding aid creation

1. Web Address of the finding aid - the url of the directory in which the finding aids are to be located .
2. Where are the images to be located on the server? Have the relative addresses of the where all the images associated with the guide are to be located.
3. The URLs, emails or relative references for publication details.
4. Define content for metadata tags.
5. The URLs of any sponsors (if applicable).
6. The contact details for the current custodian of the records covered by the finding aid.
7. An abstract describing the finding aid and the records.
8. The primary provenance id.
9. The name of the search page if it is possible to set one up.
10. Scanned images for your photo gallery - a fullsize and thumbnail image, with the size of the thumbnail in Ks.
11. If an index is to be included, then ensure you have run the latest Index profile.
12. What existing pages do I need to change to link to the finding aid?
13. Who should the existence of the finding aid be broadcast to?