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Review of Encoded Archival Description Tag Library – Version EAD3

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Review of *Encoded Archival Description Tag Library–Version EAD3*

By Technical Subcommittee for Encoded Archival Description.

Chicago: Society of American Archivists, 2015. 415 pp. Softcover. \$29.95. ISBN 978-1-931666-89-X

The *Encoded Archival Description Tag Library–Version EAD3* is the revision of the EAD standard that was last released as Version 2002. Its publication culminates five years of heroic efforts by the Society of American Archivists' Technical Subcommittee on Encoded Archival Description (TS-EAD). While the details of those efforts are too many to list, the stars of the project are TS-EAD's co-chairs, Yale University's Mike Rush and the British Library's Bill Stocking. No wonder that Rush was moved to tears as he presented the results at the 2015 SAA meeting: As TS-EAD has labored to support this essential standard now in use across the United States and around the world, families have expanded and much water has passed under the bridge! Unlike the 2002 revision, when adoption of EAD was barely past its infancy, the changes in the standard also have the potential to affect hundreds of repositories and to require changes to thousands of EAD finding aids.

First, a note on my framework for evaluating the tag library: I am the program manager responsible for the 29,000 EAD documents in Archives West (<http://archiveswest.orbiscascade.org/>) at the Orbis Cascade Alliance, now one of the largest aggregations of EAD finding aids in the United States, including support of best practices and infrastructure for 39 contributing institutions in Washington, Oregon, Idaho, Montana, Alaska, and Utah. I write not only based on a thorough review of the publication itself, but as an individual who has eagerly tracked every stage of development of EAD3. I have recently been engaged in a working group that is beginning to map the Alliance's existing EAD Best Practices to EAD3 and to convert a sample of EAD 2002 finding aids using the migration stylesheet that TS-EAD also developed as part of this project.

Also, and as a matter of full disclosure: I am named as a contributor to the development of EAD3 in the introduction as I contributed some feedback on behalf of the program I administer. However, I had no role in the production of the tag library itself and would assert that the authors were generous to acknowledge me since my role was extremely minor.

On to an overview of the publication itself. The Preface gives an effective overview of both the reasons for the revision and why it took five years. Overall, the creation of EAD3 is both in response to changing landscape that includes robust archival collection management systems, Linked Open Data, and EAC-CPF (Encoded

Archives Context—Corporate Bodies, Persons, and Families), and also an overarching need to simplify the standard and deal with its excessive flexibility. The project's guiding principles included: more consistency in the use of EAD, exploring mechanisms to seamlessly connect with, exchange, or incorporate data maintained in other protocols; improving functionality in multilingual and international environments; and being mindful that, unlike the revision of EAD 1.0 to EAD 2002, there are now many thousands of finding aids encoded in EAD 2002 and that changes should have good reasons. The introduction does a very fine job of explaining the changes in both broad and specific terms, but will be most understandable to those with detailed existing knowledge of EAD 2002.

Like its predecessors, the tag library begins with two pages of tag library conventions that explain how the 165 elements are described. Those are followed with a list and description of all the attributes used in the library, and the purpose and usage of each attribute. Next are the elements: the heart of the standard. Each element contains all the details we've come to expect from previous editions of the EAD tag library, including an explanation of how and when the tag is used, what it may contain and occur within; attributes; whether required and repeatable; related standards; and a full example with usage of the tag placed in context. The tag library finishes with two appendixes. Appendix A contains crosswalks: ISAD(G) to EAD₃, MARC 21 to EAD₃, and MODS to EAD₃. Appendix B contains a list and description of deprecated and obsolete elements and attributes along with an explanation of the process by which these elements are handled to reduce the impact on the community.

The tag library is complemented by the Document Type Definition (DTD) and schema, which are available online at <https://www.loc.gov/ead/>. The transformation stylesheets on Github convert EAD 2002 to EAD₃ and are available at <https://github.com/SAA-SDT/EAD2002toEAD3>.

The tag library's greatest strength is its thoroughness. TS-EAD took a year longer than anticipated because they wanted to ensure that the work was done right. The extra time paid off in a publication that is thorough and that will clearly be a major resource for years to come.

The tag library also has some notable missing pieces. According to the description on the SAA website, "There are many new features that enhance functionality and interoperability, including new elements and attributes." That statement is true, but we are also left without a strong understanding of those new features since the tag library does not contain sufficient information on what's changed. Unfortunately, SAA elected to make this information available in a pay-access webinar (see <http://archivists.org/prof-education/course-catalog/ts-ead3-whats-new-webinar>), meaning that practitioners pay twice for information that should arguable be more concisely packaged. The tag library would benefit greatly from a concise summary of the changes beyond what is in the introduction.

Although the authors note in the introduction that the existence of many EAD 2002 files necessitates changes only for good reasons, they fail to provide an adequate roadmap for practitioners. A crosswalk from EAD 2002 to EAD3 that clearly explains what happens when an EAD 2002 is transformed to EAD3 is a major missing element. With thousands of existing EAD 2002 finding aids at institutions and state and regional consortia—and unlike the long-ago switch to EAD 2002 where the existing body of finding aids was concentrated at a few early-adopter institutions that tended to have the resources to address transitions internally—the collective work to migrate to EAD3 constitutes a fairly massive project that will have profound effects on existing infrastructure. The recently-released transformation stylesheet, also the work of TS-EAD, shows the changes beautifully with concise comments on the change to each, but a summary in the tag library itself is an essential (and missing) resource for decision making at institutions and consortia. Without it, institutions must convert sample sets of finding aids and derive the impacts on their own.

The most glaring omission is adequate information on why to make the switch from EAD 2002 to EAD3. The possibilities inherent in the more structured physical description and dates are enticing, but until we can have a stronger case for how discovery and display uses these capabilities we're left with very little. It has been clear in presentations given by TS-EAD over these many years that the committee's members had these possibilities in mind: why not give some more concrete examples that would facilitate adoption?

Fortunately, other complementary efforts should ease some of these transitions. The Encoded Archival Description Roundtable of the Society of American Archivists is facilitating the EAD FAQ, which begins to answer some questions about the adoption of EAD. The Roundtable is also hosting the EAD3 Study Groups, which are now in the process of exploring the impacts of EAD3. With these initiatives working along and reporting out in 2016, the profession is better equipped to deal with this transition.

Last, and not directly related to the tag library itself, this transition brings with it an opportunity, particularly for repositories and consortia in the Western United States. A review of consortial EAD Best Practices that I completed for the Texas Archival Resources Online group showed that most of those best practices for EAD share a common ancestry. They have their roots in the Research Libraries Group EAD Best Practices and those of the Online Archive of California; the Orbis Cascade Alliance derived its best practices from those two sources; and in turn many others are derived from the Alliance's. With these common roots and many branches in near alignment, institutions and groups in the West will only benefit if we address the transition to EAD3 together.

In conclusion, the EAD3 tag library is a laudatory effort, and TS-EAD deserves commendation for their efforts on behalf of the profession. With many other complementary efforts and much work ahead of us to make the most of the standard, I very much hope that we, particularly we in the West, can come together to do just that.

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