

Linking Digital Content to EAD Guides in Batches

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Purpose:

These procedures outline the steps needed to batch upload links into a legacy finding aid from the digital content found in CONTENTdm or other digital asset management system. This process works best when an entire collection has been digitized.

Tools:

Excel
Word
Internet Browser
Oxygen
Mail Merge code template
Notepad

Additional Resources:

Archives West login

Procedure 1: Exporting and cleaning up spreadsheets

1. Export the metadata from CONTENTdm
 - a. Open the CONTENTdm Web Administration website
 - b. Select the correct collection
 - c. Click on the "Collection" Tab
 - d. Click on "Export"
 - e. Make sure "Tab Delimited" is selected
 - f. Additionally, click on "Return Field Names in First Record"
 - g. Click "Next"
 - h. Right click on the "export.txt" link and select "Save Link as"
 - i. Save the file using the following filenaming standard (at end of this proces, please remember to save a copy of this and any subsequent variations in Box → Metadata→Collections→*collectionname*): CollectionName_CDM_Metadata_YYYY-MM-DD.txt (use the date of exporting) For example:
 - i. AlfredGERicksonPhotographCollection_CDM_Metadata_2015-06-04.txt
 - j. Open up Excel
 - k. Click on File->Open and navigate to your .txt file
 - l. Go through the steps presented for opening up a text file in Excel, clicking "next" all the way through until you get the final screen and then clicking on "Finish".
 - m. Resave the opened .txt file as an .xlsx using the same file name as listed in Step 1.i above.
2. Edit the spreadsheet to include only the fields needed for the EAD guide. To do so, eliminate all columns **EXCEPT** the following fields:
 - a. Title
 - b. Format
 - c. Original Date
 - d. Call Number
 - e. ARK URL
3. Review the entries to make sure they are complete. Minimum requirement is that the Title and ARK URL are present and correctly recorded.

- a. For entries that are not finished, please send back to the metadata specialist in charge of the collection. Batch processing should not be attempted until all consecutive metadata is completed.
4. Sort the entries so that they are in call number order and reflect the box structure of the physical collection.
5. Depending on the complexity of your collection's hierarchy, insert at minimum, four empty columns in front of the Title Column
6. At minimum, title the new columns "Component Level," "Component Number," "Box," "Folder".
 - a. Note: If your EAD should have item level, series, or other hierarchical levels of information, you will need to insert additional columns and label them appropriately.
 - b. If you have access to the Oxygen file, you can see the original hierarchy.
7. Separate the call number information into series, box, folder, and/or item depending on collection hierarchy. To do this you need to :
 - a. Insert several columns next to the "Call Number" column
 - b. Use the following formulas to separate out the box, folder, item, etc. numbers. *Please note that you will need to adjust the text in red to reflect the changes need to map from the correct cells in your spreadsheet.*
 - i. =RIGHT(B4, LEN(B4)-6) - this deletes the beginning characters.
 - ii. =LEFT(A1, LEN(A1)-5) - this deletes the ending characters
 - c. Copy the separated out information into the appropriate column (Box, Folder, Item, etc.)
8. Once this is finished, delete the Call Number column and any "workspace" columns you used to separate out the data
9. After the last column, add a new column with the header : Resource Label
10. Under Resource Label, fill in the value "Click to access" for each record in your spreadsheet
11. Fill in the Component Numbers & Levels columns to reflect the hierarchy they should display in. *Note: you may need to view the original EAD XML file to view the hierarchy.*
 - a. Insert rows to act as place holders for the Series, Box, or Folder information. Include the descriptive titles for these levels in the title column, as well as the component numbers and level designations
 - b. Component Level terms must be one of the following:
 - i. file
 - ii. item
 - iii. otherlevel
 - iv. series
 - v. subseries
12. Resave the file under a new name using the following filenaming standard in the respective collection folder in Box→Metadata→Collection→*collectionname*: CollectionName_EADready_YYYY-MM-DD.xlsx (use the date of exporting) For example:
 - a. AlfredGERicksonPhotographCollection_EADready_2015-06-04.txt

Procedure 2: MAIL MERGE

Mail merge is used to transfer the data entered in the Excel spreadsheet to a Word document that is pre-loaded with the XML tags for EAD. Mail merge matches the information in each column to assigned fields in the EAD element tags. Once the mail merge is complete, the inventory of the collection will appear in the XML format and can be copied directly into the EAD guide.

Be sure to verify that your Excel column headings match the mappings listed below.

Mail Merge [for PC]

1. Open a Word document>>Copy and Paste the Container List Template (see example below)
2. Select Mailings Tab
3. Start Mail Merge>>Normal Word Document
4. Select Recipients>>Use Existing List
5. Select data source window
6. Navigate to container list Excel document which contains your inventory
7. Select Sheet 1 if not already highlighted
8. Select Insert Merge Field
9. Insert each EAD column heading until all columns are inserted [*Note: Merge fields/column headings are highlighted in gray*] Below is an example:

```
<c0«Component_Number» level="«Component_Level»">
<did>
<container type="box">«Box»</container>
<container type="folder">«Folder»</container>
<unitid>«Item»</unitid>
<unittitle encodinganalog="title">«Title»</unittitle>
<daogrp>
  <resource xlink:label="start">«Resource_Label» </resource>
  <daoloc xlink:label="image" xlink:href="«Ark_URL»" xlink:title="digital image of «Title»"
xlink:role="«Format»"/>
  <arc xlink:from="start" xlink:to="image" xlink:show="new" xlink:actuate="onRequest"/>
</daogrp>
<unitdate>«Original_Date»</unitdate> </did>
</c0«Component_Number»>
```

10. Finish Mail Merge and Edit Merged Document
 - a. In Mailings Tab menu select Finish & Merge>>Edit Individual Documents>>All
11. Edit Merged Document
 - a. Select Find/Replace
 - b. Enter ^b in Find and ^| in Replace All
12. Using Find and Replace delete all empty tags
13. Select All and Copy and Paste into the <dsc> portion of the Finding Aid.

MAIL MERGE [for Mac]

1. Open a Word document>>Copy and Paste the Container List Template (see example below)
2. Tools>>Mail Merge Manager
3. Create New>>Catalog
4. Get List>>Open source (choose the excel spreadsheet which contains your inventory)
5. Drag Placeholders Into Document
 - a. Click on and drag each field/column heading to the corresponding placeholder in the container list template (see example below - headings are highlighted in gray)

```
<c0«Component_Number» level="«Component_Level»">
<did>
<container type="box">«Box»</container>
<container type="folder">«Folder»</container>
<unittitle encodinganalog="title">«Title»</unittitle>
<daogrp>
```

```
<resource label="start">«Resource_Label» </resource>
<daoloc label="image" href="«Ark_URL»" title="digital image of «Title»" role="«Format»"/>
<arc from="start" to="image" show="new" actuate="onrequest"/>
</daogrp>
<unitdate>«Original_Date»</unitdate>
</did>
</c0«Component_Number»>
```

6. Complete Merge
7. Edit Merged Document
 - a. Select Find/Replace
 - b. Enter ^b in Find and ^\^ in Replace All
8. Using Find and Replace delete all empty tags
9. Select All and Copy and Paste into the <dsc> portion of the Finding Aid.

Procedure 3: Upload Finding Aid

Once the container list is pasted back into the <dsc> section of the Oxygen file and all corrections have been completed to make the file valid, upload the file onto Archives West.

This process will need to be done by someone in SCA with a login for Archives West (formerly NWDA).

Check the EAD guide on the Archives West guide to make sure it is formatted correctly and that the links work properly

