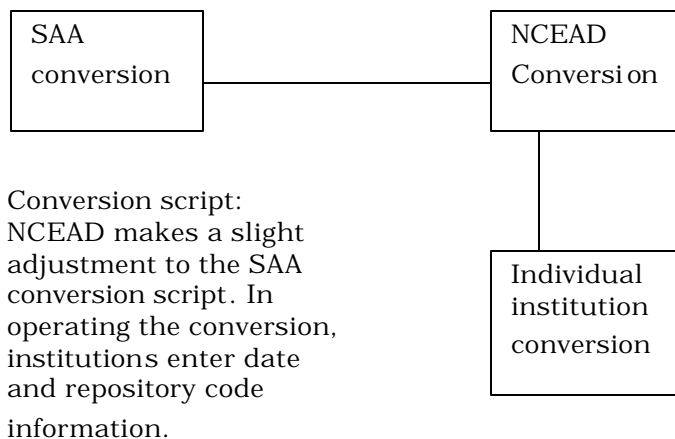


## Conversion Kit from NCEAD for Version 1.0 to EAD 2002

In April 2004, the Society of American Archivists released its conversion tools for converting EAD Version 1.0 finding aids to EAD 2002 finding aids compliant with the dtd. NCEAD has analyzed these tools and made a few minor adjustments to complement with NCEAD's implementation of the standard. While the majority of this kit is based on the structure presented in the toolkit (<http://jefferson.village.virginia.edu/ead/resources/ead2002conv/>), the instructions that follow are based on the assumption that you are using the kit provided from the NCEAD website ([http://www.ncecho.org/ncead/tools/tools\\_home.htm](http://www.ncecho.org/ncead/tools/tools_home.htm)). If you have any questions regarding the use of this kit, please contact Kathy Wisser, NC ECHO Metadata Coordinator ([katherine.wisser@duke.edu](mailto:katherine.wisser@duke.edu)).

The differences between the NCEAD Conversion kit and that provided by SAA are slight. The process here has been streamlined by Vikram Ahmed, Technical Working Group Chair, to assure that the resulting EAD 2002 documents are NCEAD compliant. This includes very minor changes and the addition of the NCEAD Seal (see <http://www.ncecho.org/ncead/documents/seal.htm> for more information). In addition, a batch option has been created. Command clips for NoteTab have been constructed to make the conversion as seamless as possible.

### NCEAD Conversion Kit diagram



### *The Conversion Process*

It is recommended that you establish a separate directory and convert copies of your EAD Version 1.0 files. Once the conversion process is complete, and you have fully valid EAD 2002 documents, you should delete all copies of the EAD Version 1.0.

The conversion toolkit includes a batch program. This batch program was established to be most efficient in the end, but it is recommended that you do

not convert your entirety of Version 1.0 files first. Test the conversion process with several single files before running the entire batch. Because tools have to be generalized to suit a variety of NCEAD implementations, there may be individual differences in encoding that need specialized attention in the conversion process. See 'Converting a Sample' below for a suggested process.

### ***Conversion Set Up***

1. Download and unzip the file ncead2002conv.zip. This is set up to install in the directory c:\ncead2002conv\. (You may have to direct your winzip program to create the file or if you have already created to unzip the material in that file.)
2. Copy all folders (from c:\notetab\ead\ directory such as addresses, dtlds, images, entities, seals, and styles) from your EAD Version 1.0 set up into c:\ncead2002conv\v1\. In other words, copy *everything in your version 1.0 directory except your .xml files to this directory.*
3. Copy the clip library created for the conversion into your Notetab directory:  
c:\notetab\Libraries\NCEADConversions.clb

### ***Running a conversion***

1. Place one version 1.0 xml file into c:\ncead2002conv\v1\
2. Select "Transform Document(s)" from the NCEADConversions Clip Library.
3. Enter your repository code
4. **Results from conversion**
  - file remains in c:\ncead2002conv\v1\
  - ead 2002 file in c:\ncead2002conv\v2002\
  - conversion report in c:\ncead2002conv\reports\
  - ead 2002 instances should render appropriately and parse
5. To review your new EAD 2002 file, copy and paste it to your EAD 2002 directory in c:\notetab\

### ***Converting a Batch***

1. Place the batch you would like to convert in the c:\ncead2002conv\v1\  
directory.
2. Select "Transform Document(s)" from the NCEADConversions Clip Library.
3. Enter your repository code and hit enter
4. **Results from conversion**
  - version 1.0 files remain in c:\ncead2002conv\v1\

- ead 2002 files in c:\ncead2002conv\v2002\  
• conversion reports in directory in c:\ncead2002conv\reports\

5. To review your new EAD 2002 files, copy and paste them to your EAD 2002 directory in c:\notetab\

### ***Converting a Sample***

Before you convert a Batch, it is recommended that you convert a sample of your finding aids to examine the conversion process and how it will affect your implementation of NCEAD. It is recognized that there are many similarities in the way that finding aids are created using the NCEAD Best Practice Guidelines and tools. However, institutions may have implemented specific aspects of the encoding standard that are not anticipated by the conversion script. While finding aids should be valid according to the EAD 2002 dtd, there may be specific changes that you need to make. It is recommended that you review a sample to identify those changes prior to the creation of many EAD 2002. While the conversion process has been streamlined, it is anticipated that each EAD 2002 finding aid will need to be examined to assure that it conforms to your institution's implementation of EAD 2002.

Because the conversion script is created to convert all files in the c:\ncead2002conv\v1\ directory, you should copy one file at a time into that directory for this sample stage. Once you are satisfied that you have an understanding on the conversion process and its effects, you may copy as many files into the folder as you would like.

This will also afford you an opportunity to update or amend your finding aids if you choose. Note that the conversion script imbeds the new NCEAD Seal and statement "NCEAD Compliant" in the <eadheader>. Check your finding aids to assure the accuracy of this statement. (see <http://www.ncecho.org/ncead/documents/seal.htm> for more information).

Once you have examined a sample, you can create a "hot spots" list that will allow you to process the converted finding aids much more quickly. This is the appropriate time to run the batch. This does not guarantee that all finding aids will hit these hot spots or that you will catch every single necessary amendment, but it will help to streamline the process.

### ***Completing the Conversion***

After you have converted all of your Version 1.0 finding aids to EAD 2002, you should be able to update these finding aids on the web. It will be important to keep a record of your finding aid conversion in your institution's documentation, and you may want to keep a copy of those files. If you do, burn them on a CD-ROM. To avoid legacy issues, it is not recommended to keep them in the same directory as your new EAD 2002 finding aids. Remember, if you are going to keep that information, you will also have to keep the dtd and

any stylesheets you used to render them in a browser (you will probably want to copy the entire ead directory to the CD-ROM). This is not considered best practice, but it may make you feel better about your finding aids. I would set that CD-ROM to expire (be tossed) after 2 years maximum so as to avoid any confusion down the road. Be sure to label your CD-ROM appropriately so that you know what it is and why you have kept it.

### ***Conversion without NoteTab***

In order to accommodate those NCEAD institutions that are not using NoteTab the authoring program, a short-cut command to the batch program is also included in the Conversion Kit:

```
c:\ncead2002conv\Batch.cmd
```

To implement this, simply double-click on this and follow the steps above. Documents will be converted from the c:\ncead2002conv\v1\ directory, placed in the c:\ncead2002conv\v2002\ directory with reports filed in c:\ncead2002conv\reports\ directory.