

Validation and Compliance Checker

When you submit a new or revised finding aid to Archives West, it's important to first run Document Validation and Compliance Checker on your file. Both of these tools check to make sure your file will upload successfully, index correctly in the database, and display on the public site.

Document Validation is the more basic tool. It checks that the file is valid XML and EAD.

First choose the file you're working with. If the file is valid, you'll receive the result "This document is valid according to Encoded Archival Description."

Let's see what happens when we upload an EAD with errors.

In this case, we received the result "EAD error: No DTD found."

We would need to correct this error in our file, then run the validation check again.

If you receive a confusing error message, feel free to contact Alliance staff for help.

Once you know your file is valid, you can move on to compliance checker. This is a more complex tool that checks your file against the Alliance's EAD best practices.

First choose the file you want to check.

The first button gives you the option to check only for compliance with guidelines that are required, and those that are mandatory if they apply to your collection.

The second button checks for compliance with all guidelines, including those that are just recommended or optional.

If you just want to make sure your finding aid will upload, index, and display correctly, selecting the first option is fine. The second option is useful for troubleshooting and fine-tuning your finding aids.

Let's see what happens when we run compliance check. First we'll select our file, then we'll choose to check against required and mandatory guidelines.

When you see the report, take a close look at the "Status" column. If you see a cell with the status "Req" for "Required," that means there's something you need to fix, or your file might not upload, index, or display correctly. The element location, comments, and possible values provide suggestions. If you don't see any issues with the status of "Req," your file should upload smoothly into Archives West.

In most cases, you will also see issues with the status of "MA" for "Mandatory if Applicable." You can use your judgment to decide if these issues apply to your finding aid and need to be addressed.

If the information in your report is unclear or confusing, feel free to contact Alliance staff.