

Metadata Guidelines for 462-20 Digital Libraries

By: Metadata Team, Spring 2016

v. 2.01 revised for Marathon Spreadsheets

Part I: Content Requirements and Naming Conventions for Required Fields

These guidelines are primarily based-upon *DACS (Describing Archives: A Content Standard)*, *ISO 8601: Date and Time Format* (<http://www.iso.org/iso/iso8601>), and *ISO 639-2* (http://loc.gov/standards/iso639-2/php/code_list.php). The main controlled vocabularies used include *Library of Congress Subject Headings* (LCSH), *Library of Congress Name Authority File* (LCNAF), and *Getty Art & Architecture Thesaurus* (AAT). Other sources and influences are the *DLF/Aquifer Summary of MODS Requirements and Recommendations Table* (<https://www.loc.gov/standards/mods/userguide/dlfaquifer.html>) and the SCUA MODS Guidelines (<http://credo.library.umass.edu/SCUAMODSGuidelines2012.pdf>.)

1. identifier

identifier should represent the identifier of the record that will be retrieved by the system, without the filename without the extension. Generally, the identifier looks like the MSS number and a date, unless more than one record is associated with a date. It does not include the side number if it is a letter

For example:

MS866_1949_02_06
MS866_1949_02_06(02)

For more information, see **3. part** below.

2. titleInfo

A title statement is required in *DACS*. Devise titles (those created by archivists) should at least include the name of the creator and/or collector and the nature of the materials being described. (*DACS*, 2.3.3) Also include pithy description of the contents of the letter or photograph. (Letter recipients will be mentioned at the folder-level of description so there is no need to include recipient in the title.)

For example: Ethel A. Killgrove (1919-2002) Correspondence from Aden

To further standardize the nature of the materials described in the title we will utilize AAT's controlled vocabulary for document genres:

Correspondence

Photographs

Photograph albums

Greeting cards

Holy cards (these look like business cards but they usually have a picture of the missionary and a prayer on it)

*These will be repeated in the **genre** subelement of **typeofResource**.

3. **part**

part has three columns: **part_id**, **part_type** and **part_order**.

3.a **part_id**

is basically the identifier but also including the side number when applicable.

For example:

MS866_1949_02_06_001

MS866_1949_02_06(02)_001

Please create additional columns for each part, as required.

3.b **part_type**

will generally always contain the word **scan**

3.c **part_order**

will be the number of the part, i.e. 1 for the first side, 2 for the second side or page, etc.

4. **name**

4.a **name**

The name of the creator is a required element according to *DACS 2.6*. The authorized form of the name is below and based-upon LCNAF conventions. It is a local convention because Ethel is not in the LC Authority files. We will also include recipient names for the letters. The naming conventions are as follows:

Killgrove, Ethel A., 1919-2002

Killgrove, Amelia, 1888-1954

Killgrove, Thomas, 1921-2010

For the name column, simply enter the name for example:

Killgrove, Ethel A.

4.b **name_date**

This column contains Ethel's birth and death dates: 1919-2002.

4.c **name_role**

For this subelement, include whether they are a **creator** or **addressee**. Even though Ethel did not take all of the photographs, she is still the primary creator and collector of them.

There are additional columns for multiple addressee recipients' names and dates.

5. **typeOfResource**

Please enter either the word **text** or the words **still image**, depending on the kind of resource.

6. **genre**

genre is under AAT authority. Please enter relevant terms:

Genre

Correspondence AAT
Photograph AAT
Photograph album AAT
Greeting card AAT
Holy card AAT

7. **originInfo**

originInfo contains four columns.

7a. **originInfo_Place**

is the location where the letter was written or the photograph taken.

For example: Aden (Yemen)

This term is under authority control. The next column contains the authority source.

7b. **originInfo_P_auth**

will contain either LCNAF or TGN. Following the lead of **11. subject** below, most likely it will always be LCNAF.

7c. **originInfo_DateCreated**

This column contains the date the resource was created.

7d. **originInfo_DateCaptured**

This column contains the date the resource was digitized.

About Date Formats

The date of creation subelement in **originInfo** is required by *DACS 2.4*. Date formats will follow *ISO 8601:2004* (w3cdtf) standards:

YYYY-MM-DD

Or

YYYY-MM

Or

YYYY

Date Ranges;

(start date)YYYY-MM-DD/ YYYY-MM-DD (end date)

Or

YYYY/MM-YYYY/MM (if no day is provided)

Or YYYY-YYYY (if no day or month are provided)

Always provide as much information as you can for dates. In the chance that a completely undated item is in the collection, use n.d. (*DACS*, 2.4.16).

8. language

8a. language

contains the human-recognized name of the language. Please enter English into this column

8b. language_code

Please enter eng into this column. Language is a required element according to *DACS* 4.5. *ISO 639-2b* codes provide a standard for metadata records and is referred to in *DACS*.

9. physicalDescription

9a. physicalDescription_extent

This element is required by *DACS* 2.5 and is a subelement of **physicalDescription**. We will use the number of pages to indicate the extent for correspondence and also include the dimensions for photographs and cards.

Dimensions: will be height of the image x width of the image and marked in inches. We will measure to the nearest quarter of an inch, if the object is not on the inch. Notate in decimals and not fractions.

We are following the MODS guidelines (except for non-on-the-inch measurements) outlined by *SCUA-UMASS Amherst* because the MODS schema has particular requirements related to extent. The guidelines can be viewed

here: <http://credo.library.umass.edu/SCUAMODSGuidelines2012.pdf>.

Examples of **extent**:

Example 1 (Correspondence): 2 p.

Example 2 (Photo Album) 12 pp.; 8.25" x 10.5" (h x w of album not photographs)

Example 3: (Photograph) 1; 3.0" x 5.0"

9b. physicalDescription_InternetMediaType

Please enter image/tiff in this column.

9c. physicalDescription_digitalorigin

Please enter reformatted digital image in this column.

10. abstract

This element is required as part of scope and content in *DACS* 3.1. Information for this element may include any or all of the following points:

- Functions, activities, transactions, and processes that generated the materials being described;
- Subject matter to which records pertain such as topics, people, events, and organizations;

- Geographic areas and places to which records pertain;
- Documentary forms or intellectual characteristics of the records being described;
- Content dates covered by intellectual or subject of unit being described;
- Any other information that assists user in evaluating relevance.

The key here is to not be redundant, but brief and accurate. 2-3 sentences will suffice. Write in present tense for consistency.

Example:

In this letter written from Aden, Yemen, Ethel A. Killgrove (1919-2002) highlights the emigration of Jews from Arabia to Palestine in September 1949 as part of Operation on the Wings of Eagles. She notes how they departed for ships in lorries and expresses doubts that Palestine will be able to accommodate all of them. Killgrove also describes a fife and drum band marching through town, and the arrival of British sailors at Aden's port.

11. subject_ and subj_auth

There are four columns for subject headings, and four columns for their related authority sources, and the column names take the form **subject_1** and **subj_auth_1**, etc.

Subject headings can fall within the scope and content element of *DACS* 3.1. 2-3 subject terms will suffice in this context, and will be selected from a list. The controlled vocabulary used in subject term formulation is marked to the right.

Geographic

Aden (Yemen) LCNAF

Addis Ababa (Ethiopia) LCNAF

Topical

Missionaries

Operation on the Wings of Eagles (Operation Magic Carpet)

Name

Sudan Interior Mission (SIM) LCNAF

These are the primary subject terms we will stick with, but if you feel a pressing need to include another subject check with Library of Congress Authorities to see if it is in there: <http://loc.gov/aba/cataloging/subject/>. Make sure that you are consistent in naming conventions, and follow the formats above (minus listing which thesaurus it came from).

12. accessCondition

This element describes conditions governing access and should include the rights' statement. It also is a required element for *DACS* (4.1). Copy and paste the rights' statement made available by the Content/ Intellectual Property group into the metadata record.

Here is the full statement:

The Ethel Killgrove Papers are being made digitally accessible with the permission of the Special Collections and University Archives of the University of Massachusetts-Amherst (hereafter referred to as SCUA) for the purposes of research and education. Section 108 (b) of the Copyright Act of 1976 permits the creation of such copies of unpublished works for preservation purposes by nonprofit organizations such as libraries and archives. By accessing this collection, users are agreeing to SCUA's copyright compliance policy regarding research, publication, and reproduction of SCUA materials at <http://scua.library.umass.edu/umarmot/services-at-scuap/permissions/>.

13. recordInfo

DACS outlines several other required elements such as location and title of repository, collection number, and language of cataloging. The DLF Aquifer gives this element Recommended status; we are following SCUA's lead here and requiring two of these subelements. There are two columns for recordInfo.

13.a recordInfo_LangOfCat

Please enter English in this column.

13.b recordInfo_ContentSrc

Please enter the following phrase in this column:

Special Collections and University Archives, University of Massachusetts Amherst
Libraries

Part II: Table of Elements, Subelements, Attributes, Values

titleInfo	<i>title</i>	---	----	
name	<i>namePart</i>	type	"Lastname, Firstname, M.I.," "date"	
----	<i>role, roleTerm</i>	type,authority	"text," "marcrelator"	creator, addressee
typeofResource	---	manuscript	"yes"	
---	<i>genre</i>	authority	"aat"	
originInfo	<i>dateCreated</i>	keyDate, encoding	"yes","w3cdtf"	
----	<i>dateCaptured</i>	encoding	"w3cdtf"	
language	<i>languageTerm</i>	authority	"iso 639-2b"	
----	<i>languageTerm</i>	type	"text," "code"	
physicalDescription	<i>extent, digitalOrigin, internetMediaType</i>	---	----	reformatted digital image image/tiff
abstract	---	---	---	
subject	<i>geographic, topical,name, genre, occupation</i>	authority	"lcsch" "lcnaf" (if it exists there) "local"	
identifier		local	"file name"	
accessCondition		type	"useAndReproduct ion"	
recordInfo	<i>languageOfCataloging, recordContent Source</i>			English

