



METADATA GUIDELINES FOR SUBJECT SPECIALISTS AND CURATORS

THINGS YOU NEED TO KNOW FOR YOUR COLLECTION

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AGENDA

- Introduction to the Metadata Guidelines
- Requirement for Minimum Records
- Requirement for Standard Records
- Requirement for Full Records
- The process: Templates and how to fill them out
- Role of Metadata Management (a.k.a. “Cataloging) unit
- Practice exercises
- Recap



INTRODUCTION TO THE METADATA GUIDELINES



BACKGROUND

In December of 2017, a working group consisting of three catalogers (Charity Stokes, Jeannette Ho, and Joseph Olivarez) was formed in response to make recommendations regarding metadata in preparation for the DAME (Digital Asset Management Ecosystem).

The charge included (but was not limited to) the following:

- 1) To determine the metadata workflow for projects being placed into A&M OAKTrust digital repository.
- 2) To recommend minimal metadata requirements for repositories within the DAME (OAKTrust and Fedora) and recommend schema and controlled vocabularies**
- 3) To do the above while maintaining INTEROPERABILITY between the two systems.

**For the purpose of this presentation, we will focus on #2.

BACKGROUND

- Origin of the Metadata Guidelines and Where to Find Them:
- Most of the working group's work was completed in Spring 2018.
- Later that year, two of its members (Charity Stokes and Jeannette Ho) were assigned the task of drafting metadata guidelines to IMPLEMENT the recommendations of the working group.
- Guidelines were completed in January and were last revised in May. (They will continue to be updated)
- They can be found at: <http://hdl.handle.net/1969.1/175368>
- Or just go to OAKTrust and do a search for “metadata guidelines”!

METADATA GUIDELINES FOR DIGITAL RESOURCES AT TEXAS A&M UNIVERSITY LIBRARIES

Purpose of the Guidelines:

- I) To help TAMU partners create high quality metadata for digital collections deposited in the repository at TAMU Libraries by ensuring an acceptable level of **CONSISTENCY AND COMPLETENESS** of metadata across all collections in the repository.
 - By specifying what elements should be recorded and when for **ALL COLLECTIONS**, regardless of format
 - These are **SCHEMA-NEUTRAL** elements that can be used with either Dublin Core and MODS
- II) To help Digital Initiatives personnel at TAMU Libraries to map metadata to appropriate fields in Dublin Core and MODS (the two most commonly used metadata schema in the Hydra Fedora community)
 - OAKTrust uses Dublin Core
 - The working group recommended MODS for Fedora

THE ORGANIZATION OF THIS DOCUMENT AND DEFINITIONS

- **Core elements:** This refers to metadata that is considered most essential.
 - **Mandatory (M) elements** must always be recorded in all circumstances
 - **Mandatory if applicable and available (MA) elements** must be recorded if 1) it applies (i.e., is relevant) to a particular resource, and 2) If this information is known or can be easily obtained.
- **Non-core elements:** This refers to metadata that are not required, but may be recorded to provide “extra” information if the metadata provider judges them to be useful.
 - **Recommended elements** are not required for all metadata, but may be particularly useful for certain types of collections.
 - **Optional elements** are neither required nor recommended, but may optionally be recorded if they fulfill a special need of a collection, or if it can enhance the use of a resource by providing context or additional information

HOW MUCH METADATA TO PROVIDE? :THREE OPTIONS FOR “COMPLETENESS”

- **Minimal Level:**
 - “Mandatory” (M) elements + at least **ONE** subject term (controlled or uncontrolled) if applicable
 - This is the BARE MINIMUM metadata required to be acceptable to the repository
 - If you don’t have time to do more than a minimal level, Metadata Management unit (aka “Cataloging” unit) might be able to enhance your minimal metadata to fuller levels (Consult with us if this is the case!)
- **Standard level:**
 - All “Core” elements (“Mandatory” (M) AND “Mandatory if applicable and available (MA) elements)
 - Metadata providers are encouraged to strive toward this level.
- **Fuller level:**
 - All “Core” elements + as many recommended and/or optional elements that are relevant to a particular resource as you want!



REQUIREMENTS FOR MINIMUM RECORDS



REQUIREMENTS FOR MINIMUM RECORDS

To be acceptable within the repository, a metadata record must at the very least, contain the elements designated as “Mandatory” in all situations. A record containing only these elements is considered to meet the bare minimum standard of completeness. Although fuller metadata is encouraged, this minimal approach may be taken if metadata providers lack the time or expertise to provide more complete information.

Elements needed for Minimum records are

- Title
- Content Type
- Digital Publisher
- Rights/Access
- Reformatting
- Filename
- Subject
- *Date of publication (required for audio and video collections only)**

** Avalon requires this element while our other repository platforms don't*

REQUIREMENTS FOR MINIMUM RECORDS

■ **Title (M, non-repeatable)**

- **Definition:** The primary name given to a resource.
- **Usage guidelines:**
 - Typically, a title will be a name by which the resource is formally known. It is usually assigned by the creator of the resource and is found on the resource itself. Transcribe the title as accurately as possible.
 - If no title is found on the resource, look for one on materials that supplement the resource.
 - If no title can be found for a resource, supply one when feasible.

REQUIREMENTS FOR MINIMUM RECORDS

TIPS FOR RECORDING TITLES:

- Make sure the title is **UNIQUE**. Do not assign the same title to all resources within a collection.
 - If the title happens to be the same on the item, use numbering to differentiate them (e.g., Equine Anesthesia no. 2)
- Make the title as **DESCRIPTIVE** as possible if no title is available and you must supply one (e.g., as in the case of unpublished photographs not originally intended to be part of our collections)
 - Choose words that would be useful in a keyword search using information that is known about the item:
 - Example: “Portrait of George Smith posing in a football uniform on Kyle Field at Texas A&M University.”
 - NOT: “Boy in a football uniform.”
- In rare cases where it is not possible to make the title descriptive or unique (e.g., collection of marbled paper artworks that just consists of abstract patterns and don’t depict anything), record “Untitled”

REQUIREMENTS FOR MINIMUM RECORDS

■ **Content Type (M, repeatable)**

- **Definition:** The nature or the genre of the resource. It specifies the characteristics and general type of content of the resource.
- **Usage guidelines:** Use DCMI Type vocabulary (<http://dublincore.org/documents/dcmi-type-vocabulary/>) Choose the most specific term that is available.
 - If no term matches resource being described, may use terms from other controlled vocabularies to supplement this vocabulary
 - Use RDA term “Cartographic image” in addition to DCMI Type term “StillImage” for maps

REQUIREMENTS FOR MINIMUM RECORDS

Use the following controlled terms to record Content Type (M, repeatable)

Dataset	Data encoded in a defined structure.
Event	A non-persistent, time-based occurrence
InteractiveResource	A resource requiring interaction from the user to be understood, executed, or experienced.
MovingImage	A series of visual representations imparting an impression of motion when shown in succession.
PhysicalObject	An inanimate, three-dimensional object or substance
Service	A system that provides one or more functions
Software	A computer program in source or compiled form
Sound	A resource primarily intended to be heard.
StillImage	A static visual representation.
Text	A resource consisting primarily of words for reading.
Cartographic image	A term from <i>Resource Description and Access (RDA)</i> because <i>DCMI</i> lacks a term for maps.

REQUIREMENTS FOR MINIMUM RECORDS

- **Digital Publisher (M, repeatable)**
 - **Definition:** An entity responsible for making the resource DIGITALLY available. For example, a resource (e.g., a technical report) may have been previously published by the Texas A&M Transportation Institute, but the Libraries would be the entity digitizing it and making it available online in our repository.
 - **Usage guidelines:** Since the Texas A&M University Libraries is responsible for making the described resources available in their current form, always consider it to be the digital publisher.
 - **Example for OAKTrust and “born digital” items in Fedora):**
 - “Texas A & M University. Libraries”
 - **Example for item that was published prior to digitization in Fedora:**
 - “Made digitally available by Texas A&M University Libraries.”

REQUIREMENTS FOR MINIMUM RECORDS

■ **Rights/Access (M, repeatable)**

- **Definition:** Information about rights held in and over the resource and terms of its use and reproduction.
- **Usage guidelines:** Use a controlled copyright statement from <https://rightsstatements.org/en/> to ensure consistency of the rights statement across all items in the institutional repository. Follow this statement with the URL to its website where users may read more information about what it means.
- If open access, record “Openly accessible” in addition to copyright statements
- **Example:**
- In copyright-educational use permitted || For more information about rights and restrictions relating to this resource, go to: <http://rightsstatements.org/vocab/InC-EDU/1.0/></dc:rights>||Openly accessible

REQUIREMENTS FOR MINIMUM RECORDS

■ Reformatting (M, repeatable)

- **Definition:** Whether a resource was digitized from another physical format or was originally created in online form.
- **Usage guidelines:** Use phrases recommended by DLF/Aquifer Guidelines

born digital	A resource was created and is intended to remain in digital form.
reformatted digital	A resource was created by digitization of the original which was in a non-digital form (except original microforms).
digitized microfilm	A resource was created by digitizing a microform
digitized other analog	A resource was created by digitizing an intermediate form of the original resource (but not microform) such as photocopy, transparency, slide, 2nd generation analog tapes, etc.

REQUIREMENTS FOR MINIMUM RECORDS

■ **Filenames (M)**

- **Definition:** Filename used to identify a digital resource.
- **Usage guidelines:** Filenames are mandatory, since it is essential to be able to connect the metadata with the particular digital image that is being described.
 - It is required for batch ingest for OAKTrust
 - It is actually not required for batch ingest into Fedora (the entire file path is required) but we still need it as a placeholder to keep track of what image is being described. Record it until you know what that file path will be!

REQUIREMENTS FOR MINIMUM RECORDS

- **Subject (MA, repeatable)**
- **Only one subject heading or keyword is required for a minimal-level record**
- **Definition:** The topic of a resource. Can be a topic, person, organization or place.
- **Usage guidelines:** May be controlled or uncontrolled. It is strongly preferred that controlled subject terms be used from your choice of thesauri.
 - Even if you use controlled terms, you are encouraged to also supplement them with uncontrolled keywords to facilitate natural language searching.
 - Assign terms that are as specific as possible

REQUIREMENTS FOR MINIMUM RECORDS

- **Subject (MA, repeatable) continued:**
- **Example of **CONTROLLED** subject terms from Library of Congress Subject Headings:**
 - Agricultural and Mechanical College of Texas--Students|| Agricultural and Mechanical College of Texas--Football--History--20th century || Kyle Field (College Station, Tex.) || Football players—Texas—College Station
- **Example of **UNCONTROLLED** subject terms from no particular thesaurus**
 - Footballers || Aggieland football
 - Texas A&M College of Veterinary Medicine|| Graduation ceremony
 - NOT: “CVM event”
 - TIP: Don’t assign a term or phrase that is too vague to accurately describe what resource depicts or is about. Also think how likely that they will be used to search this phrase by users who don’t know what “CVM” stands for!

REQUIREMENTS FOR MINIMUM RECORDS

■ **Subject (MA, repeatable): Where to get controlled terms?**

- See Appendix I of the Metadata Guidelines for links to controlled vocabularies and thesauri you may use for subject terms. Here are a few to start with:
- **Library of Congress Subject Headings and Name Headings:** <https://authorities.loc.gov/>
- **Getty's Art and Architecture Thesaurus(AAT):**
http://www.getty.edu/research/conducting_research/vocabularies/aat/
- **Library of Congress' Thesaurus for Graphic Materials (TGM):** <http://www.loc.gov/rr/print/tgm1/>
- You are not LIMITED to sources in the Metadata Guidelines. If you use other controlled vocabularies, let us know and we can add them to the Guidelines so that others can consider whether to use them.

EXAMPLE OF A MINIMUM LEVEL RECORD

Title	Texas beyond the periphery: an archaeological study of the Spanish missions during the 18 th century
Content type	text
Digital publisher	Texas A&M University. Libraries
Rights/Access	In copyright
Rights/Access	For more information about rights and restrictions relating to this resource, go to: http://rightsstatements.org/vocab/InC-EDU/1.0/
Filename	1556635.pdf
Reformatting	reformatted digital
Subject	Spanish mission buildings—Texas
Subject	Anthropology



REQUIREMENTS FOR STANDARD RECORDS



REQUIREMENTS FOR STANDARD (I.E. “MEDIUM LEVEL) RECORDS

- Metadata providers are encouraged to strive toward this level
 - It should provide enough information to enable discovery of a digital resource for most users.
 - Can provide more information to make record fuller if desired

REQUIREMENTS FOR STANDARD RECORDS: “CORE” ELEMENTS

- The Standard record has all the elements of the Minimum record:
 - Title
 - Content Type
 - Digital Publisher
 - Rights/Access
 - Reformatting
 - Filename
 - Subject
 - *Date of publication (for audio/video only)*
- PLUS these added Mandatory if Applicable and Available elements
 - Creator/Author(s)
 - Date Published
 - Date Created
 - Summary/Abstract
 - Language
 - Institution/Department
 - Local Digital Identifier
 - Standard Identifier
 - Edition/Revision Information

REQUIREMENTS FOR STANDARD RECORDS: MANDATORY IF APPLICABLE/AVAILABLE ELEMENTS

■ Creator (MA, repeatable)

- **Definition:** A person or organization primarily responsible for the intellectual content of the item.
- **Usage guidelines:** Enter the components of a name in the following order: {Last name}, {First name or initial} {Middle name or initial, if known}. If there are multiple initials, leave spaces between them.
- **Examples:**
 - Smith, John Robert
 - Wang, Thomas A.
 - Hines, A. J.

REQUIREMENTS FOR STANDARD RECORDS: MANDATORY IF APPLICABLE/AVAILABLE ELEMENTS

- **Date published (MA, non-repeatable, Mandatory for audio or video)**
 - **Definition:** Date of original publication, presentation or distribution of a resource prior to digitization. If a resource has never been published prior to digitization, it is the date it was digitized.
 - **Usage guidelines:** Always record date of issuance if resource was previously published prior to digitization.
 - Record as:
 - YYYY (e.g., 2018)
 - YYYY-MM (e.g., 1990-06)
 - YYYY-MM-DD (e.g., 2000-08-16)
 - Recording dates in the above formats ensures that one may LIMIT searches by these dates.
 - If you have to record dates in a different format (e.g., 1980 or 1981?), you can do so, but your dates will NOT GET INDEXED for searching (although they will DISPLAY to users in OAKTrust and Fedora)

REQUIREMENTS FOR STANDARD RECORDS: MANDATORY IF APPLICABLE/AVAILABLE ELEMENTS

- **Date published (MA, non-repeatable, Mandatory for audio or video)**
- Don't assume issue dates of newsletters, journals, etc. are same as publication dates
- Example: September 2019
- This is the date of CHRONOLOGY. Just because it is the September 2019 doesn't always mean the issue came out in September.
 - Record "September 2019" in a note
 - Record "2019" as an estimate of date of publication (without a "?" or users can't limit searches using this year)

REQUIREMENTS FOR STANDARD RECORDS: MANDATORY IF APPLICABLE/AVAILABLE ELEMENTS

■ **Date created (MA, non-repeatable)**

- **Definition:** Date of the creation of the resource in its original form. For instance, it can be the date a letter was written, the date a photograph was taken or a film shot on camera. This is NOT the same thing as when it was originally “published.”
- **Usage guidelines:** This element is mandatory if applicable and available if:
 - A) Date of creation differs from the date of publication
 - B) Date of original publication is unknown
 - C) The resource was never published prior to digitization
- Follow same formatting as Date published (YYYY,YYYY-MM, or YYYY-DD)

REQUIREMENTS FOR STANDARD RECORDS: MANDATORY IF APPLICABLE/AVAILABLE ELEMENTS

■ **Summary/Abstract (MA, repeatable)**

- **Definition:** A summary or abstract of the resource.
- **Usage guidelines:** This is a free-text field where the resource is described.
- It is recommended to copy and paste an existing summary or abstract if one lacks time or the resources needed to compose one. One may edit an existing one, if higher quality is desired.
- If you must create one, strive to answer who, what, when, and why. Use specific words that people would be likely to search under.

REQUIREMENTS FOR STANDARD RECORDS: MANDATORY IF APPLICABLE/AVAILABLE ELEMENTS

■ Language (MA, repeatable)

- **Definition:** A language of the resource.
- **Usage guidelines:** Assign if there is a language expressed in the resource. Don't use for still images (that don't depict words), recordings of instrumental music or sounds, videos without dialogue, etc.
- Use three-letter codes from ISO 639-2 (http://www.loc.gov/standards/iso639-2/php/code_list.php)
- **Examples:**
 - eng
 - spa

REQUIREMENTS FOR STANDARD RECORDS: MANDATORY IF APPLICABLE/AVAILABLE ELEMENTS

- **Institution/Department (MA, repeatable)**
- **Definition:** An entity responsible for contributing a collection to the repository.
- **Usage guidelines:** Record this element if the contributor is a different institution or a more specific unit of Texas A&M, such as a library, college or department.
 - May record it as an access point or a note
 - If record it as an access point, follow controlled form in Library of Congress National Authority File, if there is one (search name at <http://id.loc.gov/authorities/names.html>). If not, record as it is found on its website or other source
- **Examples:**
 - Texas A & M University. College of Veterinary Medicine
 - Digital collection contributed by Texas A&M University's College of Veterinary Medicine

REQUIREMENTS FOR STANDARD RECORDS: MANDATORY IF APPLICABLE/AVAILABLE ELEMENTS

- **Local Digital Identifier (MA, repeatable)**
- **Definition:** Local identifier (not including filename used to identify a digital resource)
- **Usage guidelines:** Locally assigned identifiers other than filenames are mandatory if they are available for a given digital resource. (But if identifier is for the original physical form of a resource, it is optional)
- **Example:** TXA17888

REQUIREMENTS FOR STANDARD RECORDS: MANDATORY IF APPLICABLE/AVAILABLE ELEMENTS

- **Standard Identifier (MA, repeatable)**
- **Definition:** An unambiguous reference to the digital resource within a given context that adheres to an international standard (e.g. ISBN or DOI)
 - Rule of thumb: If you can't name the international standard that is used for a particular number, it's NOT a standard identifier
- **Usage guidelines:** Record this element if applicable. The standard identifier must refer to the digital form of the resource, and not the physical form of the resource before it got digitized.
- **Examples:**
 - 10.1000/182
 - 9780784482049

REQUIREMENTS FOR STANDARD RECORDS: MANDATORY IF APPLICABLE/AVAILABLE ELEMENTS

- **Edition/Revision Information (MA, repeatable)**
- **Definition:** Information identifying a particular edition or version of the resource.
- **Usage guidelines:** Record if such a statement is present on the resource itself. This element may apply to some resources that may have multiple versions.
- **Examples:**
 - “Preliminary draft”
 - “Final version”
 - “Second edition”

EXAMPLE FOR STANDARD RECORDS

- Elements that are needed:
 - Title (M)
 - Content type (M)
 - Rights/Access (M)
 - Filename (M)
 - Subject (MA)
 - Creator/Author(s) (MA)
 - Date Published (MA)
 - Date Created (MA)
 - Summary/Abstract (MA)
 - Language (MA)
 - Institution/Department (MA)
 - Local and/or Standard Identifier (MA)
 - Edition/Revision Information (MA)

Title	Texas beyond the periphery: an archaeological study of the Spanish missions during the 18 th century
Content type	text
Date Issued	1994
Abstract/Summary	The majority of Spanish settlement in Texas took place during the 18 th century when Spain was recovering from a serious economic decline that began ca. 1500 and continued until 1760. Spain's failure to maintain her settlements in Texas has been attributed to this economic decline—frequently referred to as “the century of depression.”
Creator	Carlson, Shawn Bonath
Publisher	Texas A&M University. Libraries
Rights/Access	In copyright—educational use permitted
Rights/Access	For more information about rights and restrictions relating to this resource, go to: http://rightsstatements.org/vocab/InC-EDU/1.0/
Filename	1556635.pdf
Reformatting	reformatted digital
Language	eng
Subject	Spanish mission buildings—Texas
Subject	Anthropology
Subject	Spaniards—Texas--Antiquities
Subject	Texas--Antiquities

M=Mandatory

MA=Mandatory if applicable/available



REQUIREMENTS FOR FULLER RECORDS

GOING BEYOND THE “CORE” ELEMENTS OF A STANDARD RECORD



REQUIREMENTS FOR FULLER RECORDS: RECOMMENDED ELEMENTS

A metadata record consisting of all “Core” elements and all recommended and/or optional elements that are relevant to a particular resource would be considered as “full” as possible.

- **Alternative Title**
- **Genre**
- **Table of Contents**
- **Contributor**
- **Related resource**
- **Original publisher**
- **Physical Extent**
- **Sponsor**

RECOMMENDED ELEMENTS FOR FULLER RECORDS

■ **Alternative Title**

- **Definition:** An alternative name for the resource that users are **LIKELY** to search under. They can also be: acronyms, abbreviations, translations in different languages, etc.
- **Example:**
 - **Title:** A time for resolve: Texas A&M during the Great Depression
 - **Alternative title:** Texas A&M during the Great Depression

RECOMMENDED ELEMENTS FOR FULLER RECORDS

■ Genre

- **Definition:** The form or genre of the resource. Term that describes what a resource IS (e.g., a painting, a documentary film, etc.) than what it DEPICTS or is ABOUT
- **Usage Guidelines:** Try to assign at least one term from MARC genre list if you can at <https://www.loc.gov/standards/valuelist/marcgt.html>, Don't use it for videos. In addition, supply as many genre terms as you want.
- Use of controlled terms from a thesaurus is preferred. See Appendix I of the Metadata Guidelines for links to thesauri for genre terms, Follow capitalization practices of the particular thesauri you use.
- Examples:
 - technical report
 - photographs
 - Correspondence
 - Oral histories
 - Documentary films

RECOMMENDED ELEMENTS FOR FULLER RECORDS

■ **Table of Contents**

- **Definition:** A list of subunits contained within a resource.
- **Usage Guidelines:** Recommended when you have discrete works within the resource, such as separate interviews, speeches, etc. on different topics. Record when considered important.
- May be ESPECIALLY important for AUDIO or VISUAL resources where people can't easily browse the contents
- **Example:**
 - **Title:** Qatar Foundation and Texas A&M University at Qatar: Engineering building celebration, March 19, 2007, Doha, Qatar
 - **Table of Contents:** Intro -- The spirit of Aggieland by Century Sounds -- Aggie Wrangler performance -- The Pearl Qatari Dance Troupe – Speech by Dr. Mark H. Weichold -- Dr. Abdulla Al-Thani -- President George H.W. Bush -- HE Abdullah bin Hamad Al-Attiah -- Gov. Jame R. "Rick" Perry -- Dr. Ed J. Davis -- TAMUQ students -- Arrival of the train -- Journey of TAMUQ in Education Society -- Now Arriving... -- Laser show finale.

RECOMMENDED ELEMENTS FOR FULLER RECORDS

■ Contributor

- **Definition:** Any person or corporate body that makes contributions to a resource but is not its primary creator (e.g., illustrator, editor, etc.).
- **Usage Guidelines:** Record names of people involved if they are important and will be searched under. Enter {Last Name}, {First Name} {Middle name or initial} just like you would do for creators
- **Example:** Brown, Thomas H.

■ Related resource

- **Definition:** A resource (either digital or print) that the resource being described is related to
- **Usage Guidelines:** This is recommended when the resource is part of a larger one (e.g., a chapter that is part of a book or a series). Record either the title and/or URI of the related resource.
- **Examples:**
 - Anthology of American Horror Short Stories
 - The James Bennett Anthropology Lecture Series
 - <http://hdl.loc.gov/umich.dli.moa/AGE3371>

RECOMMENDED ELEMENTS FOR FULLER RECORDS

■ Original publisher

- **Definition:** Entity that published a resource before it was digitized.
- **Usage guidelines:** Record name of publisher (e.g., Texas A & M University Press). It is preferred to follow the form in the Library of Congress National Authority File, if there is one (search name at <http://id.loc.gov/authorities/names.html>). If not, record as it is found on its website or other source

■ Physical Extent

- **Definition:** A statement of the number and specific material of the units of the resource, and/or physical dimensions of the original item that became digitized.
- Usage Guidelines: Include number of units and optionally, dimensions if non-textual (e.g., photographs, etc.). May include other details like color, etc.
- Example:
 - 26 pages
 - 2 color photographs, 4 x 6 in.
 - 2 plaster models, 57 x 79 x 32 cm. and 51 x 65 x 20 cm.

RECOMMENDED ELEMENTS FOR FULLER RECORDS

■ **Sponsor**

- **Definition:** A person or group that funds or sponsors the development of some aspect of a resource (e.g., funding research, sponsoring an event.).
- **Usage Guidelines:** Record if important. Optionally record either the name of sponsor or include in a note.

Elements (Red=Mandatory for minimal record; Blue=Mandatory if applicable/available for standard record; Purple=Recommended; Black=Optional for fuller record)

To
Recap:

Title	Institution/Department	Original resource
Content type	Identifier (digital)—standard or local	Notes
Rights/Access	Edition/Revision Information	Original place
Filename	Alternative Title	Audience level
Subject	Genre	Classification
Reformatting	Table of Contents	Physical item identifier
Digital Publisher	Contributor(s)	Physical location
Creator(s)	Related resource	Source collection
Date Created	Physical extent	Others?
Date Published Summary/Abstract Language	Original Publisher	

AN OPTIONAL BUT IMPORTANT ELEMENT! (FOR ANY RECORD LEVEL)

■ **Notes**

- **Definition:** Descriptive information not defined in other fields..
- **Usage Guidelines:** Use for information relevant to the item which is not covered in any of the recommended fields, but is felt to be important for the user.
- **Example:**
 - “This item was part of an exhibit, "Texas A&M during the Great Depression," shown in Cushing Memorial Library from August 31, 2018 through February 22, 2019.”
 - “This item was previously owned by Alfred J. Sloane, Texas A&M University alumnus, Class of 1988.”
 - “Requires the use of {name of software and additional system requirements} in order to view .ply file and to print 3D objects from the file.”

EXAMPLE OF A FULLER RECORD (THERE IS NO CEILING!)

Title	Texas beyond the periphery: an archaeological study of the Spanish missions during the 18 th century
Alternative Title	An archaeological study of the Spanish missions during the 18 th century
Content type	text
Date Issued	1994
Abstract/Summary	The majority of Spanish settlement in Texas took place during the 18 th century when Spain was recovering from a serious economic decline that began ca. 1500 and continued until 1760. Spain's failure to maintain her settlements in Texas has been attributed to this economic decline—frequently referred to as “the century of depression.”
Table of Contents	Introduction – A global approach to Spain's colonization: world-system theory – Historical and cultural geography of New Spain: the interior province of Tejas – The archaeological evidence – Evidence of a world-system in New Spain – Conclusions.
Note	Based on a dissertation submitted to Texas A&M University in the field of anthropology in 1990.
Extent	270 pages
Creator	Carlson, Shawn Bonath
Contributor (role=illustrator)	Hugill, Peter J.
Contributor (role=editor)	Shafer, Henry J.
Publisher	Texas A&M University. Libraries
Rights/Access	In copyright-educational use permitted
Rights/Access	For more information about rights and restrictions relating to this resource, go to: http://rightsstatements.org/vocab/InC-EDU/1.0/1556635.pdf
Filename	1556635.pdf
Reformatting	reformatted digital
Language	eng
Related resource	Spanish missions in Texas during the 18 th century: a dissertation
Related resource (URL to thesis book was based on)	http://hdl.handle.net/1990/ThesisMissionsTexas
Genre	Book
Subject	Spanish mission buildings—Texas
Subject	Anthropology
Subject	Spaniards—Texas—Antiquities
Subject	Texas—Antiquities

METADATA TEMPLATES

- Metadata Management is working on a set of templates for inputting descriptive metadata with required and recommended elements. It can work with you to customize templates if you need additional elements
- It is also working on additional metadata requirements and templates that are specific to non-textual formats (video, audio, still images, etc.)
- For now, we are using spreadsheets. We are also experimenting with Google Forms to input metadata
- When templates are ready, we will announce where they can be accessed

EXAMPLE OF A COMPLETED METADATA TEMPLATE (AFTER A CATALOGER CLEANED IT UP)

Berger-Cloonan-metadata-public-domain-cleaned-labels-exportAug16.xlsx [Read-Only] - Excel

	F	G	H	I	J	K	
1	Date created	Digital publisher	Rights/access	Rights/access	Reformatting	Physical extent	Material
2	<mods:originInfo><dateCreated encoding="iso8601">	<mods:originInfo><publisher>	<mods:accessCondition type="use and reproduction">	<mods:accessCondition type="restriction on access">	<mods:physicalDescription><digitalOrigin>	<mods:physicalDescription><extent>	<mods:physi
3	dcterms:created xsi:type="dcterms:W3CDTF"	dc:publisher	dc:rights	dc:format	dc:format	dcterms:extent	dcterms:me
4	Late 19th century	Texas A & M University. Libraries	No copyright - United States For more information, see: http://rightsstatements.org/vocab/NoC-US/1.0/	Openly accessible	reformatted digital	1 sheet of blue, pink, white and light brown marbled paper; 18.00 x 23.00 in.	Paper
5	1911	Texas A & M University. Libraries	No copyright - United States For more information, see: http://rightsstatements.org/vocab/NoC-US/1.0/	Openly accessible	reformatted digital	1 sheet of red, yellow, blue, black and white marbled paper; 16.00 x 24.00 in.	Paper
6	1911	Texas A & M University. Libraries	No copyright - United States For more information, see: http://rightsstatements.org/vocab/NoC-US/1.0/	Openly accessible	reformatted digital	1 sheet of red, yellow, blue, black and white marbled paper; 16.00 x 24.00 in.	Paper
7	1911	Texas A & M University. Libraries	No copyright - United States For more information, see: http://rightsstatements.org/vocab/NoC-US/1.0/	Openly accessible	reformatted digital	1 sheet of red, yellow, blue, black and white marbled paper; 16.25 x 24.00 in.	Paper
8	19th century	Texas A & M University. Libraries	No copyright - United States For more information, see: http://rightsstatements.org/vocab/NoC-US/1.0/	Openly accessible	reformatted digital	1 sheet of magenta, brown, purple, black and white printed paper; 17.00 x 27.00 in.	Paper
9	19th century	Texas A & M University. Libraries	No copyright - United States For more information, see: http://rightsstatements.org/vocab/NoC-US/1.0/	Openly accessible	reformatted digital	1 sheet of light brown, dark brown and white paste paper; 17.00 x 27.50 in.	Paper
			No copyright - United States For more				

Berger Cloonan metadata public

METADATA TEMPLATES: HOW TO FILL OUT A SPREADSHEET

- When filling out a spreadsheet, you may delete any column you don't need that is not marked as "mandatory"
- Use caution with "Mandatory if applicable/available" elements. Don't delete them if they are relevant and the information is known.
- Under "Subject" and "Genre" columns, use a separate column for each individual thesaurus that you use (Don't mix terms from different controlled vocabularies in the same column)
- Use a separate column for uncontrolled subject terms if you are using them.
- If a collection is going into Fedora, you need to consult with Digital Initiatives on where the files for each item will be stored. (File paths of each item must be recorded in the spreadsheet before collection can be batch ingested!). This can be the LAST STEP after all the other metadata is entered.

METADATA TEMPLATES: HOW TO FILL OUT A SPREADSHEET

- For collections that are NOT video or audio: Record separate values for the same element in the same column separated by double pipe (||) symbols
 - **Example:** For two creators in the “Creator” column:
 - Smith, John H. || Yang, Thomas.
 - **Example:** For multiple notes in the “Note” column:
 - Inscription on original piece: “Gift of Karli Frigge 7/10/00”; “done in 1911”; “Gebr. GIELES.” || Karli Frigge donated the sheet to Sidney E. Berger and Michele V. Cloonan on 07/10/2000. || Section(s) from the Decorated and Decorative Paper Terms Thesaurus: VIII.F.1 || Not signed. Stamped. Not stickered. Not embossed. || Slightly yellowed

WHAT IS THE ROLE OF THE METADATA MANAGEMENT UNIT (AKA THE “CATALOGING UNIT”)?

- Share templates tailored for a particular format with you and help you customize it for your particular project’s needs before you begin enter metadata.
- Create a “collection level” record for your entire collection (as defined by DLEG) for our catalog.
 - The OCLC number would go in your metadata spreadsheet
- Enhance the metadata after you are finished entering it by:
 - Adding elements that have identical values for each item so that you don’t have to!
 - Adding “fuller elements” that you lack resources to do (especially if you are creating minimal level descriptions)
 - Find controlled terms in a thesaurus for subject keywords that you assign
- “Clean up” spreadsheets after you are finished with the metadata to prepare it for batch ingest into our repository

WHEN TO CONSULT WITH US?

- At the beginning (before you enter any metadata)
- Any time in between if you have questions or run into problems
- At the end (after you are done with the metadata!)

WHERE TO GO WITH QUESTION OR FOR HELP

- Jeannette Ho (jaho@library.tamu.edu)
- Charity Stokes (charity.martin@library.tamu.edu)
- digital@library.tamu.edu (for all questions relating to our repository)



PRACTICE EXERCISES





RECAP

