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Metadata Guidelines for Digital Resources at Texas A&M University Libraries

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Introduction

These guidelines were written to help TAMU partners create high quality metadata for digital collections in the repository at TAMU Libraries. Their goal is to ensure an acceptable level of consistency and completeness of metadata across all collections in the repository in order maximize their potential for discovery for the TAMU community.[1] These guidelines were also written to help Digital Initiatives personnel at TAMU Libraries to map metadata to appropriate fields in Dublin Core and MODS, two of the most commonly used schema within the TAMU repository.

The guidelines, as they are currently written, address metadata elements that may be recorded for ALL digital collections within the repository, regardless of whether they consist of text, still images, video, or any other type of content. It is likely that specific formats may require additional metadata than what is currently described in this document. More specific guidelines for various formats may be added to this document in the future.

It should be noted that this document is a work in progress and will continue to be revised and expanded upon. For questions, or to offer feedback, please contact Jeannette Ho at jaho@library.tamu.edu.

The Organization of this Document and Definitions

This document is organized into two main sections: "Core" metadata elements and "Non-core" elements.

Core elements: These elements are considered to be the most essential within the TAMU repository. They include elements that are designated as "Mandatory" in all circumstances, as well as those that are designated "Mandatory if applicable and available."

- **Mandatory (M)**: An element labeled "M" for Mandatory" must always be recorded. For example, "Title" is required for all resources, regardless of whether a resource has been given one by its creator. If a resource lacks a title, metadata providers are instructed to supply one themselves or record "Untitled" if this cannot reasonably be done.

- **Mandatory if applicable and available (MA)**: An element labeled "MA" for "Mandatory if applicable and available" 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. A metadata provider is not required to spend more than a minimum amount of effort to look for such information. If it cannot readily be found, then the element may be skipped. In other cases, a particular element may simply not relevant or applicable to a

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[1] In this document, the term "repository" is used to refer to OAKTrust, as well as other databases used by TAMU Libraries to provide access to digital collections for the TAMU research community.

particular resource. For instance, the elements "creator" or "language" would not be recorded for a collection consisting of recorded sounds of nature, such as birdsongs.

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. They include elements that are "recommended" and "optional."

- **Recommended:** An element with this label is not required for all metadata, but may be particularly useful for certain types of collections. The metadata provider is encouraged to apply them if he or she considers them to be helpful in making resources more discoverable. An example of a "recommended" element would be a genre term that designates what a digital resource IS (i.e., a photograph) than what it is ABOUT.

- **Optional:** An element with this label is neither required nor recommended, but may optionally be recorded if it fulfills a special need of a collection (e.g., specifying the audience level for a juvenile video), or if it can enhance the use of a resource by providing context or additional information (e.g., specifying that a resource is a chapter of a particular book).

In each of these main sections, individual metadata elements are listed. Under each element is a definition and a set of usage guidelines, intended for metadata providers. Each element also has a section called "Mandatory requirements" which describes fields that it should be mapped to in Dublin Core and MODS, followed by examples. The examples are intended to assist both Digital Initiatives personnel who perform the actual mappings in the repository, as well as assist metadata providers who may benefit from seeing sample values for a particular metadata field.

How Much Metadata is Needed? : Three Options for "Completeness"

There are three general levels regarding how "complete" a metadata record has to be.

Minimal Level: To be acceptable within the repository, a metadata record must at the very least, contain the elements designated as "Mandatory" in all situations, and AT LEAST ONE subject keyword or controlled heading, if applicable.[2] 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.

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[2] A subject term or heading will almost always be applicable to every case except for rare exceptions (e.g., a non-representational work of art that does not actually depict something or is "about" anything.)

Standard level: A metadata record consisting all "Core" elements ("Mandatory" AND "Mandatory if applicable and available elements) is considered "standard," in that it should provide enough information to enable discovery of a digital resource for most users. Metadata providers are encouraged to at least strive toward this level.

Fuller level: 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. While a "standard" level record should provide sufficient information, metadata providers may choose to make the record as full as needed if this would improve discovery for a specialized type of resource or enhance its usefulness for its target audience.

To see examples of metadata records for these three approaches, see the Appendix of this document.

Metadata Elements that Do Not Need to be Recorded (i.e., that are System Supplied)

Some metadata elements are automatically supplied by the TAMU Libraries repository when digital resources get uploaded. Thus, there is not a need to record the following types of information, since they would duplicate information that is already generated by the system:

- File format (e.g., image/jpeg, etc.)
- Date of digital publication (e.g., the date a resource became available online in the repository)
- URL at which a resource may be accessed
- Name of a collection
- Duration (i.e., playing time) for audio and video resources
- File size

Note: While the names of digital files are also system supplied, they still need to be recorded, since it is essential to keep track of which file is being described by the metadata.

General Guidelines for All Elements

Many, but not all, elements in this document may be repeated. For example, a particular resource may have multiple creators, multiple languages, etc. All elements are designated as either "repeatable" or "non-repeatable" in this document.

When recording multiple values for the same repeatable metadata element, one must record them within a single field (or column, if using a spreadsheet).   For example, if one is using a spreadsheet to record metadata, one may have a single column for the element "creator." Within this column, one must record the names for each creator, separated by a double pipe symbol (||).

Examples:

Smith, John H.||Chu, James N.||Baum, Ronnie G.

The same thing would apply for all other elements listed in this document. (For example, one would record values for multiple languages within the same field as: eng|| ita.)

The "Core" Elements Part 1: Elements that are Mandatory (M):

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 (e.g., notes, etc.) if any exist, or other sources, if applicable.

 If no title can be found for a resource, supply one when feasible. In this case, use what is known about the content of the resource to make the title as descriptive as possible. Use words that would be helpful to a user who is conducting a keyword search to find the resource in the repository.

 For example, a title such as "Portrait of George Smith posing in a football uniform on Kyle Field at Texas A&M University" would be more descriptive and potentially helpful in a keyword search than "Boy in a football uniform."

If there are alternative forms of the title that are likely to be searched (including foreign language titles), do not record them under the "Title" element. Instead, use the **Alternative Title** element. (See the section of this document that discusses this field under "Elements that are Recommended.")

If there is a series title, also do not record it in this element. If access to a series is desired, enter it in a separate "Related resource" field. (See the section of this document that discusses this field under "Elements that are Optional.")

If there is a sub-title and the metadata schema being used does not allow for sub-titles, collapse by title and subtitle into a single field, preferably separated by a colon or other punctuation. If the subtitle is judged as being useful for users to search under, one may additionally record it in the **Alternative Title** element.

Mandatory practice: Map this element to <dc:title> if using Dublin Core. If using MODS, map it to <mods:title>, which is a subelement of the <mods:titleInfo> element.

Examples of Use:

Mapping to Dublin Core:

    <dc:title>Gone with the wind</dc:title>

    <dc:title>Forensic engineering: Forging a path into the future</dc:title>

Mapping to MODS:

    <mods:titleInfo>

        <mods:title>Gone with the wind</mods:title>

    </mods:titleInfo>

OR:

    <mods:titleInfo>

        <mods:title>Forensic engineering</mods:title>

        <mods:subtitle>Forging a path into the future</mods:subtitle>

    </mods:titleInfo>

NOTE: In the DLF/Aquifer MODS guidelines, at least one <titleInfo> element with one <title> subelement is required.

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. For still images, use the DCMI Type term "StillImage" instead of the broader term "Image."

The DCMI Type terms that are applicable to the repository are listed and defined below:

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.

If there is not a DCMI Type term that adequately describes the content of a resource, one may use terms from other controlled vocabularies in conjunction with DCMI Type terms.

When describing a digitized map, assign the RDA (*Resource Description and Access*) term "**Cartographic image**" in addition to the DCMI Type term "StillImage."

Mandatory practice: Map this element to the <dc:type> element if using Dublin Core.

Ifusing Dspace, map it to <dc:type.material>. The latter element is a non-standard Dspace tag used only within OAKTrust, but not in the other repositories at TAMU.

 If using MODS, map it to <mods:typeOfResource>

Examples of Use:

Mapping to Dublin Core:

<dc:type>Text</dc:type>

<dc:type>StillImage</dc:type>

<dc:type>Cartographic image</dc:type>

But in Dspace:

<dc:type.material>Text</dc:type.material>

<dc:type.material>StillImage</dc:type.material>

<dc:type.material>Cartographic image<dc.type.material>

Note: <dc:type.material> is a non-standard Dspace tag used only within OAKTrust, but not in the other repositories at TAMU.

Mapping to MODS:

<mods:typeofResource>

       <typeofResources">Cartographic image</typeofResource>

</mods:typeofResource>

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.

If collection is intended for OAKTrust, or if an item is "born digital," record the name as "Texas A & M University. Libraries," following the Library of Congress' established form. If neither is the case, record as a note "Made digitally available by Texas A&M University Libraries."

Mandatory practice: Map this element to <dc:publisher> if using Dublin Core. If using MODS, map it to <mods:publisher>, which is a subelement of the <mods:OriginInfo> element, if a resource is "born digital" (i.e., was never published before). For resources that were published in a physical form prior to digitization, map it to the <mods:note> element.

Examples of use:

Mapping to Dublin Core:

<dc:publisher>Texas A & M University. Libraries</dc:publisher>

Mapping to MODS:

DLF/Aquifer guidelines: "Information about an institution responsible for digitizing and delivering online a previously published resource should be included in <note>, rather than <originInfo><publisher>":

- If resource was "born digital" (never previously published in non-digital form):

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<mods:originInfo>
        <publisher>Texas A&M University. Libraries</publisher>
</mods:originInfo>
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- If resource HAS been published in another form prior to digitization:

    `<mods:note>Made digitally available by Texas A&M University Libraries.</mods:note>`

Rights/Access (M, repeatable)

Definition: Information about rights held in and over the resource and terms of its use and reproduction, as well as access.

Usage guidelines:

First, use a controlled copyright statement from https://rightsstatements.org/en/ to ensure consistency of the rights statement across all items in the institutional repository. Repeat this field and provide a link to the URI for the specific copyright statement that is being used.   This will enable users to click on it and read an explanation of the statement.

Second, If the entire content of a resource is intended to be made openly accessible to the public, repeat this field and use the phrase "**Openly accessible to the public**" (There is no equivalent phrase in Rightsstatements.org, since copyright is a related but separate concept. A resource may be in copyright, but may or may not be made accessible to the public.) If a resource is intended to be restricted for users who are on the campus of TAMU or are affiliated with it, use the phrase, "**Access restricted to users affiliated with Texas A&M University**."

Mandatory practice: Map this element to the <dc:rights> element if using Dublin Core.

If using Dspace, map the URL to the Dspace element <dc:rights.uri>. The latter element is a non-standard Dspace tag used only within OAKTrust, but not in the other repositories at TAMU.

If using MODS, map this element to <mods:accessCondition>. Set the value of the "type" attribute to "use and reproduction" if the statement addresses copyright issues. But set its value to "restriction on access" if the statement addresses access restrictions (e.g., whether something is openly accessible or limited to TAMU users only) rather than restrictions on use.

Examples of Use:

Mapping to Dublin Core:

<dc:rights>In copyright-educational use permitted </dc:rights>

<dc:rights> For more information about rights and restrictions relating to this resource, go to: http://rightsstatements.org/vocab/InC-EDU/1.0/</dc:rights>

<dc:rights>Openly accessible to the public</dc.rights>

But in Dspace only, would you code the URL in the following manner:

<dc:rights.uri>http://rightsstatements.org/vocab/InC-EDU/1.0/i</dc.rights.uri>

Note: <dc:rights.uri> is a non-standard Dspace tag used only within OAKTrust, but not in the other repositories at TAMU.

Mapping to MODS:

<mods:accessCondition type="use and reproduction"> In copyright-educational use permitted</mods:accessCondition>

<mods:accessCondition type="use and reproduction">For more information about rights and restrictions relating to this resource, go to: https://rightsstatements.org/page/InC-EDU/1.0/</accessCondition> </mods:accessCondition>

<mods:accessCondition type="restriction on access">Openly accessible to the public</mods:accessCondition>

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.

Mandatory practice: Map this element to the <dc:format> element if using Dublin Core.

But if using OAKTrust, map it to the Dspace element <dc:format.digitalOrigin>. The latter element is a non-standard Dspace tag used only within OAKTrust, but not in the other repositories at TAMU.

If using MODS, map it to <mods:digitalOrigin> which is a subelement of the <physicalDescrption> element.

Examples of Use:

Mapping to Dublin Core

<dc:format>born digital</dc:format>

But in Dspace only:

<dc:format.digitalOrigin>born digital</dc:format.digitalOrigin> . The latter element is a non-standard Dspace tag used only within OAKTrust, but not in the other repositories at TAMU.

Mapping to MODS:

<mods:physicalDescrption>

      <mods:digitalOrigin>born digital</mods:digitalOrigin>

</mods:physicalDescrption>

Filename (M)

Definition: Name of a file that contains and is 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 particularly essential for enabling the batch importing of resources going into the OAKTrust repository.

Mandatory practice: Map this element to <dc:identifier> if using Dublin Core. If using MODS, map this element to <mods:identifier> and set the attribute "type" to the value of "local."

Examples of Use:

Mapping to Dublin Core:

<dc:identifier> AsIDoThee4OCR.pdf </dc:identifier>

Mapping to MODS

<mods:identifier type="local"> AsIDoThee4OCR.pdf </mods:identifier>

The "Core" Elements Part 2: Elements that are Mandatory if Applicable and Available (MA)

Subject (MA, repeatable)

Definition: The topic of a resource

Usage guidelines:

May be controlled or uncontrolled.

It is strongly preferred that controlled subject terms be used from your choice of thesauri. Some examples of thesauri that could be used include: *the Library of Congress Subject Headings, Library of Congress' Thesaurus for Graphic Materials, Getty's Art and Architecture Thesaurus* and others. For a fuller list of thesauri that may potentially be used, see the "Sources of Controlled Vocabularies for Subjects" section in this document in Appendix 2 ("Links to Standards Referenced Throughout the Guidelines") on page 48.

Mandatory practice: Map this element to the <dc:subject> element if using Dublin Core.

But If using Dspace, map it to the Dspace element that corresponds to the source of the controlled vocabulary that is being used (dc:subject.lcsh, dc:subject.mesh, dc:subject.tgm, dc:subject.nalt (for the NAL Agricultural Thesaurus), dc.subject.tgm (for the Library of CongressThesaurus of Graphic Materials), dc:subject.tgn (for the Getty Thesaurus of Geographic Names), dc:subject.other). Please note that the latter elements are non-standard Dspace tags that are only used within OAKTrust, but not in other repositories at TAMU. If no controlled vocabulary is used, map it to <dc:subject> in OAKTrust.

 If using MODS, map it to <mods:subject>. If a controlled subject term is being used, set the "authority" attribute to reflect the source of the controlled vocabulary (e.g., a thesaurus). Consult the list of *Subject Heading and Term Source Codes* at https://www.loc.gov/standards/sourcelist/subject.html

Optional practice: If mapping to MODS, include URIs of the source of the controlled term (using the attribute "authority") and the value of the controlled term itself (using the attribute "valueURI"). Having values of controlled terms in the form of URIs is beneficial in a linked data environment.

Examples of Use:

Mapping to Dublin Core:

<dc:subject>Bridges</dc:subject>

<dc:subject> Agricultural and Mechanical College of Texas--Football--History--20th century</dc:subject>

But in Dspace only:

<dc:subject.lcsh> Agricultural and Mechanical College of Texas--Football--History--20th century</dc:subject.lcsh>

Note: the elements dc:subject.lcsh, dc:subject.mesh, dc:subject.tgm, dc:subject.nalt, dc.subject.tgm, dc:subject.tgn, and dc:subject.other are is a non-standard Dspace tag used only within OAKTrust, but not in the other repositories at TAMU.

Mapping to MODS

<mods:subject>Bridges</mods:subject>

<mods:subject authority="aat" authorityURI="http:// www.getty.edu/research/tools/vocabularies/aat/" valueURI= "http://vocab.getty.edu/page/aat/300007838 "> arch bridges</mods:subject>

Note: In the above example, a Getty Art and Architecture Thesaurus term is used. According to *Subject Heading and Term Source Codes* at https://www.loc.gov/standards/sourcelist/subject.html, the code for this source is "aat."

Creator (MA, repeatable)

Definition: A person, organization, or service 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}.

For example: Smith, John H.

It is recommended to use controlled forms of names such as ones found in the Library of Congress Name Authority File, for example. If one cannot find a controlled form of name, construct a name using the guidelines described above.

For textual resources, consider authors to be creators.

For individual works of art where text is not the primary content, consider the artist (e.g., photographer, sculptor, etc.) to be the creator.

For videos, consider directors and screenwriters responsible for the overall content of a work to be creators.

For video and audio resources that record interviews with an individual (e.g., oral histories), consider the interviewee to be a creator.

For video and audio resources that feature lectures (either as individual works, or as part of a panel of speakers), consider the speaker(s) (but not the moderator) as creator(s).

Mandatory practice: Map this element to <dc:creator> if using Dublin Core. If using MODS, map it to <mods:name> and specify its role using one of the MARC relator terms from *MARC Relator Code and Term Lis*t at https://www.loc.gov/marc/relators/relaterm.html.

If using MODS, map family and given names (including middle names and initials) in separate <mods:namePart> tags.

Examples of Use:

Mapping to Dublin Core:

<dc:creator>Smith, John H.</dc:creator>

Mapping to MODS:

<mods:name type="personal" authority="naf">

       <mods:namePart type="family">Smith</mods:namePart>

       <mods:namePart type="given">John H.</mods:namePart>

       <mods:role>

       <mods:roleTerm type="text" authority="marcrelator">photographer</mods:roleTerm>

       </mods:role>

</mods:name>

Note: "Photographer" is the MARC relator term used to specify the role of the creator since in this example, the resource being described was a digitized photograph. Other potential relator terms may be selected for other types of resources. Consult the *MARC Relator Code and Term Lis*t at https://www.loc.gov/marc/relators/relaterm.html for a list of terms and their definitions.

Date published (MA, non-repeatable; M for video and audio only)

Definition: Date of original publication, presentation or distribution of a resource prior to digitization.

Usage guidelines:

If known, always record **Date published** to indicate when a resource was previously published prior to digitization. For resources that are NOT video or audio, this is the only situation where this value is mandatory if applicable. (It is not mandatory to record when a resource was published online, unless users of the collection will find this date to be meaningful.)

It is strongly PREFERRED to record dates using one of the following formats (ISO 8601 extended format) whenever possible:

- YYYY
- YYYY-MM
- YYYY-MM-DD

Dates must follow any of the above formats in order to get INDEXED in our repository. This enables the public to LIMIT their searches by date to retrieve a resource.

If one does not know an exact date, but it is possible to estimate a single year, it is recommended to record the year in YYYY format (e.g., 1990), as opposed to recording it in a nonstandard form such as "2001?," or "circa 1996," etc. If desired, one may also record a note in the same record that "Date of publication is an estimate."

If it is not possible to estimate a single year, one may record multiple questionable dates (e.g., 2001 or 2002?), date ranges (e.g., 1999-2000) as well as centuries (e.g., 19th century). It is better to record this information for the benefit of repository users even when it is not possible to follow the ISO 8601 standard. But understand that while such non-standard dates will get DISPLAYED within our repository, they will not be INDEXED in the manner described earlier above.

Mandatory practice: Map this element to <dc:date.issued> if using Dublin Core. If using MODS, map it to <mods:dateIssued> for resources originally published prior to digitization.

Examples of use:

Mapping to Dublin Core:

<dc:date.issued>1978</dc:date.issued>

Mapping to MODS:

<mods:originInfo>

      <mods:dateIssued encoding="iso8601">1978</mods:dateIssued>

</mods:originInfo>

Date created (MA, non-repeatable)

Definition: Date of the creation of the resource in its original form (e.g., Date a manuscript was originally written as opposed to when it was published, or the date the content of a video was originally shot for release as a motion picture, as opposed to when it was later converted to digital form for the repository).

Usage guidelines:

This element is mandatory if applicable and available if the resource's date of original publication is unknown, is different than the date of creation, or if a resource was never published prior to digitization. An example of the latter would be a typewritten letter that was never published.

If one records this field, it must be in a separate field (or column, if using a spreadsheet) than the value for the element "Date published."

It is strongly PREFERRED to record dates according to one of the following formats (ISO 8601 extended format) whenever possible:

- YYYY
- YYYY-MM
- YYYY-MM-DD

Dates must follow any of the above formats in order to get INDEXED in our repository. This enables the public to LIMIT their searches by date to retrieve a resource.

If one does not know an exact date, but it is possible to estimate a single year, it is recommended to record the year in YYYY format (e.g., 1990), as opposed to recording it in a nonstandard form such as "2001?," or "circa 1996," etc. If desired, one may also record a note in the same record that "Date of publication is an estimate."

If it is not possible to estimate a single year, one may record multiple questionable dates (e.g., 2001 or 2002?), date ranges (e.g., 1999-2000) as well as centuries (e.g., 19th century). It is better to record this information for the benefit of repository users even when it is not possible to follow the ISO 8601 standard. But understand that while such non-standard dates will get DISPLAYED within our repository, they will not be INDEXED in the manner described earlier above.

Mandatory practice: Map this element to <dc:date.created> if using Dublin Core. If using MODS, map it to <mods:dateCreated>.

Examples of Use:

Mapping to Dublin Core:

<dc:date.created>1990</dc:date.created>

Mapping to MODS:

<mods:originInfo>

        <mods:dateCreated encoding="iso8601">1990</mods:dateCreated>

</mods:originInfo>

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 a summary or abstract is not available, one may compose a summary that may be as brief or as lengthy as necessary to describe the resource. Include information about who, what, when, and where if not recorded elsewhere.

For non-textual resources, such as still images videos, audio recordings, it is especially important to include names of people, places, and events that appear in them. Since people can't browse the contents as easily as textual resources, they can help make non-textual resources more findable when conducting searches in the repository.

Mandatory practice: Map this element to <dc:description> for summaries and <dc:description.abstract> if using Dublin Core.

If using MODS, map both summaries and abstracts to <mods:abstract>.

Examples of Use:

Mapping to Dublin Core:

<dc:description>A presentation describing the design and implementation of an Open Educational Resources Teaching Award at Texas A&M University.</dc:description>

<dc:description.abstract> Many efforts to address congestion and safety and their financing that are being made locally can directly impact some of the most congested roadways on the state system. This situation requires research to examine ways that adopting innovative technology at the local level might impact the efficiency of state infrastructure, and likewise identify opportunities to leverage funding for these programs. For this report, the research team examined smart parking, which is a parking management to help drivers find and pay for available parking in a more efficient manner by knowing where they could park prior to

reaching their destination. The researchers chose downtown Houston for their case study.</dc:description.abstract>

Mapping to MODS

<mods:abstract> A presentation describing the design and implementation of an Open Educational Resources Teaching Award at Texas A&M University</note>

<mods:abstract> Many efforts to address congestion and safety and their financing that are being made locally can directly impact some of the most congested roadways on the state system. This situation requires research to examine ways that adopting innovative technology at the local level might impact the efficiency of state infrastructure, and likewise identify opportunities to leverage funding for these programs. For this report, the research team examined smart parking, which is a parking management to help drivers find and pay for available parking in a more efficient manner by knowing where they could park prior to reaching their destination. The researchers chose downtown Houston for their case study.</note>

Language (MA, repeatable)

Definition: A language of the resource.

Usage guidelines:

Record language for resources where this element is relevant, using 3-letter codes from ISO 639-2b (http://www.loc.gov/standards/iso639-2/php/code_list.php)

ISO 639-2 includes three letter identifiers for names of languages. For languages that have multiple codes, choose the ones that are labeled (B) instead of (Y) (e.g., use "ger" not "deu" for the German language).

This element will be applicable to all textual resources, as well as most audio and video resources (that have a sung or spoken aspect to them).

It will not be applicable to all resources. For instance, it will not apply to most still images, since language is not typically essential. However, there may be exceptions if an image contains words that are important to understanding that image's meaning.

Language will also not apply to audio recordings of nonverbal sounds (e.g., bird calls, etc.) or purely instrumental music.

Mandatory practice: Map this element to <dc:language> if using Dublin Core. If using MODS, map it to <mods:languageTerm>.

If using Dspace, map recorded language codes to the Dspace element <dc:language.iso>. The latter element is a non-standard Dspace tag used only within OAKTrust, but not in the other repositories at TAMU.

Examples of Use:

Mapping to Dublin Core:

<dc:language>eng</dc:language>

But in Dspace:

<dc:language.iso>eng</dc:language.iso>

Note: <dc.language.iso> is a non-standard Dspace tag used only within OAKTrust, but not in the other repositories at TAMU.

Mapping to MODS:

<mods:language>

       <mods:languageTerm type="code" authority="iso639-2b">eng</mods:languageTerm)

</mods:language>

Institution/Department (MA, repeatable)

Definition: An entity responsible for contributing a collection to the repository. Examples include name of an institution or specific unit within one, such as a library, college or department.

Usage guidelines:

Record this element when the contributor happens to be a different institution than Texas A&M University (e.g., another university or separate agency) or a more specific unit of Texas A&M, such as a library, college or department (e.g., Cushing Memorial Library, College of Veterinary Medicine, etc.)

It is preferred that this element be recorded as an access point, but it may also be recorded as a note, depending on the needs of a particular digital project.

If recording this element as an access point, prefer controlled form in Library of Congress' National Authority File (LCNAF).

Mandatory practice: Map access points for this element to <dc:contributor> when using Dublin Core.

If using MODS, map this element to <mods:publisher> (which is a subelement of <mods:originInfo>) if the contributor had previously published a resource prior to digitization (e.g., a technical report that was previously published in print form and has become digitized). If the contributor was not the original publisher, map this element to <mods:name> and specify its role using one of the MARC relator terms (e.g., "curator," "provider," etc.) from *MARC Relator Code and Term Lis*t at https://www.loc.gov/marc/relators/relaterm.html.

If this element is recorded as a note, map it to <dc:description if using Dublin Core. If using MODS, map such a note to <mods:note>.

Examples of Use:

Mapping to Dublin Core:

- If recorded as an access point:

  <dc:contributor>Texas A &M University. College of Veterinary Medicine</dc:contributor>

- If recorded as a note:

  <dc:description> Digital collection contributed by Texas A&M University's College of Medicine.</dc:description>

Mapping to MODS:

- If recorded as an access point:

1) In the example below, the TTI previously published a report in print form, and later contributed it to the Libraries in order for it to be digitized for the repository:

    <mods:originInfo eventType="publication">

      <mods:publisher>Texas A &M University Transportation Institute</mods:publisher>

    </mods:originInfo>

2) In the example below, Texas A&M's College of Veterinary Medicine has gotten permission for the Libraries to digitally publish a collection of images. These images originally appeared in a book that had a different publisher:

    <mods:name type="corporate" authority="naf">

      <mods:namePart>Texas A & M University. College of Veterinary Medicine</mods:namePart>

      <mods:role>

        <mods:roleTerm type="text" authority="marcrelator">curator</mods:roleTerm>

```
    </mods:role>

  </mods:name>
```

Note: "Curator" is the MARC relator term used to specify the role of the College of Veterinary Medicine above, since in this example, it contributed the entire collection but was not the original publisher of the actual images. This role is defined as: "A person, family, or organization conceiving, aggregating, and/or organizing an exhibition, collection, or other item."

Other potential relator terms may be selected if they fit other types of situations. Consult the *MARC Relator Code and Term Lis*t at https://www.loc.gov/marc/relators/relaterm.html) for a list of terms and their definitions.

- <u>If recorded as a note:</u>

  <mods:note>Digital collection contributed by Texas A&M University's College of Veterinary Medicine.</mods:note>

Standard Digital 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)

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.

Mandatory practice: Map this element to <dc:identifier> if using Dublin Core.

<u>If using Dspace,</u> map it to the appropriate Dspace Dublin Core field depending on which standard identifier is recorded: <dc.identifier.govdoc>, <dc.identifier.isbn>, <dc:identifier.issn>, <dc:identifier.sici>, <dc:identifier.ismn>, <dc:identifier.other>, <dc.identifer.uri>. (The latter elements are non-standard Dspace tags used only within OAKTrust, but not in the other repositories at TAMU.)

If using MODS, map this element to <mods:identifier> and set the attribute "type" to the appropriate value from the *Standard Identifier Source* Codes at https://www.loc.gov/standards/sourcelist/standard-identifier.html

Examples of Use:

Mapping to Dublin Core:

<dc:identifier> 10.1000/182</dc:identifier>

But in Dspace:

<dc.identifier.isbn> 9780784482049</dc:identifier.isbn>

Note: <dc.identifier.govdoc>, <dc.identifier.isbn>, <dc:identifier.issn>, <dc:identifier.sici>, <dc:identifier.ismn>, <dc.identifier.other>, <dc.identifer.uri>are non-standard Dspace tags used only within OAKTrust, but not in the other repositories at TAMU.

Mapping to MODS

<mods:identifier type-"doi"> 10.1000/182</mods:identifier>

Local Digital Identifier (MA, repeatable)

Definition: Local identifier (not including filename) that is 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.

For example, it could be a local ID number that is assigned to each resource within a digital collection that is also used to designate the numbering of the order that it appears in.

NOTE: This is NOT the same thing as an identifier that refers to the physical form of a resource prior to digitization or to the digitized form. To see examples of the latter, see the section on Non-Core 'Optional' elements in this document.

Mandatory practice: Map this element to <dc:identifier> if using Dublin Core. If using MODS, map this element to <mods:identifier> and set the attribute "type" to the value of "local."

Examples of Use:

Mapping to Dublin Core:

<dc:identifier>TXA178888 </dc:identifier>

Mapping to MODS

<mods:identifier type="local"> TXA178888</mods:identifier>

Edition/Revision Information (MA, repeatable)

Definition: Information identifying a particular edition or version of the resource. It can apply to the content of the work prior to digitization, or to a particular online version of a resource (e.g., "Version 1.0" or "2nd edition.")

Usage guidelines:

Record if applicable and available for a given resource. This element may apply to some resources that may have multiple versions. For example, a technical report may have several versions (draft, preliminary, final) that get digitized for our repository or that are simply known to exist. In such cases, it's important for the public to understand which version a resource represents when viewing its metadata, since this may influence their decision about whether to read it.

Mandatory practice: Map this element to <dc:description> if using Dublin Core. If using MODS, map this element to <mods:edition> which is a subelement of <mods:originInfo>. For the latter element, set the attribute value of "eventType" to "publication."

Examples of Use:

Mapping to Dublin Core:

<dc:description> Final version</dc:description>

Mapping to MODS

<mods:originInfo eventType="publication">

      <mods:edition>Second edition</mods:edition>

</mods:originInfo>

<mods:originInfo eventType="publication">

      <mods:edition>Final version </mods:edition>

</mods:originInfo

The "Non-Core" Elements Part 1: Elements that are Recommended

Alternative Title (Recommended, repeatable)

Definition: An alternative name for the resource.

Usage guidelines:

Record if it is judged that the public would be likely to search under the alternative title for a particular resource. Alternative titles can take many forms, including but not limited to: acronyms, abbreviations, translations in different languages, variant forms of the same title, or different titles that the resource may be known as.

Mandatory practice: Map this element to <dc:title.alternative> if using Dublin Core. If using MODS, map this element to <mods:titleInfo> and set the attribute value of "type" to "alternative."

Examples of Use:

Mapping to Dublin Core:

<dc:title.alternative> Engineering for extreme environments</dc:title.alternative>

Mapping to MODS

<mods:titleInfo type="alternative"> Engineering for extreme environments</mods:titleInfo>

Genre (Recommended, repeatable)

Definition: The form or genre of the resource**.**

Usage guidelines: element if the resource represents a particular format (e.g., photographs) or genre (e.g., Documentary films) that is judged to be useful for the public to be able to limit their searches with.

Assign controlled terms from the *MARC Genre Term List* (https://www.loc.gov/standards/valuelist/marcgt.html) whenever possible. If none of these terms are judged to be adequate or descriptive enough, one may record term(s) from other thesauri instead of or in addition to the *MARC Genre Term List.*   Consult Appendix 1 of this document ("Links to Standards and controlled vocabularies referenced in this document") under "Genres" (p. 49) for a list of other possible sources that may be used to select appropriate terms.

If no adequate term for a particular form or genre exists in any controlled vocabulary, one may record an uncontrolled term. In this case, contact the Metadata Management unit, so that it may potentially be added as a locally controlled term to be used consistently across similar collections in the repository.

For digital videos, do not use the terms "video recording" or "motion picture" from the *MARC Genre Term List.* Use the *Library of Congress Genre/Form* heading "**Internet videos**" instead.

Mandatory practice: Map this element to <dc:type> if using Dublin Core.

If using MODS, map this element to <mods:genre> and set the attribute value of "authority" to reflect the code for the thesaurus or controlled vocabulary list that a particular term came from. Consult the lists of *Genre/Form Code and Term Source Codes* (https://www.loc.gov/standards/sourcelist/genre-form.html) and list of *Subject Heading and Term Source Codes* (https://www.loc.gov/standards/sourcelist/subject.html) for an appropriate code.

Optional practice: If mapping to MODS, include URIs of the source of the controlled term (using the attribute "authority") and the value of the controlled term itself (using the attribute "valueURI"). Having values of controlled terms in the form of URIs is beneficial in a linked data environment.

Examples of Use:

Mapping to Dublin Core:

<dc:type> Technical report</dc:type>

<dc:type>Photographs</dc:type>

<dc:type>Documentary films</dc:type>

But in Dspace:

Map this element to both <dc.type.genre> and <dc.subject>. The element <dc.type.genre> is a non-standard Dspace tag used only within OAKTrust, but not in the other repositories at TAMU.

It is necessary to map to both elements because only <dc.subject> displays in the short record view in OAKTrust at this time.

Mapping to MODS

<mods:genre authority="marcgt">Technical report</mods:genre>

<mods:genre authority="aat" authorityURI="http://
www.getty.edu/research/tools/vocabularies/aat/" valueURI=
"http://vocab.getty.edu/page/aat/300046300">Photographs</mods:genre>

<mods:genre authority="lcgft">Documentary films</mods:genre>

Table of Contents (Recommended, repeatable)

Definition: A list of subunits contained within a resource.

Usage guidelines:

It is recommended to record this element if a resource happens to contain a subset of named individual works (e.g., songs with individual titles or lectures on separate topics that are part of an audio file, etc.) or units (modules within a teaching manual) that may be important for the public to know about before accessing the resource.

Use an existing table of contents if available. If none exists or the number of subunits is large, use judgment about whether to record this element.

Mandatory practice: Map this element to <dc:description.tableOfContents> if using Dublin Core. If using MODS, map this element to <mods:tableOfContents>.

Examples of Use:

Mapping to Dublin Core:

<dc:description.tableOfContents> 1. Fall Fashion Show -- 2. Nutrition at Bryan Hospital -- 3. Rennaissance Festival -- 4. Jeff Dykes Interview.</dc:description.tableOfContents>

Mapping to MODS

<mods:tableOfContents> 1. Fall Fashion Show -- 2. Nutrition at Bryan Hospital -- 3. Rennaissance Festival -- 4. Jeff Dykes Interview.</mods: tableOfContents>

Note: In the example above, an audio recording contains labeled segments of a radio new program. These were used to create the table of contents note.

Contributor (Recommended, repeatable)

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:

Enter the components of a name in the following order: {Last name}, {First name or initial}, {Middle name or initial, if known}.

For example: Smith, John H.

It is recommended to use controlled forms of names such as ones found in the Library of Congress Name Authority File, for example. If one cannot find a controlled form of name, construct a name using the guidelines described above.

For textual resources, consider editors and contributors of supplementary content (e.g., illustrators) to be contributors.

For video and audio resources, consider actors, musicians, hosts, moderators, interviewers, and narrators who appear in the resources to be contributors.

Mandatory practice: Map this element to <dc:contributor> if using Dublin Core. If using MODS, map it to <mods:name> and specify its role using one of the MARC relator terms from *MARC Relator Code and Term Lis*t at https://www.loc.gov/marc/relators/relaterm.html.

If using Dspace, map to the appropriate Dspace Dublin Core element depending on the role of the contributor: <dc:contributor.photographer>, <dc:contributor.advisor> (for thesis advisors), <dc:contributor.editor>, <dc.contributor.illustrator>, <dc.contributor.other>. (The latter elements are non-standard Dspace tag used only within OAKTrust, but not in the other repositories at TAMU.)

Do NOT use <dc:contributor.author>.

If using MODS, map family and given names (including middle names and initials) in separate <mods:namePart> tags.

Examples of Use:

Mapping to Dublin Core:

<dc:contributor>Sorrenson, Margaret</dc:contributor>

But in Dspace:

<dc:contributor.illustrator> Sorrenson, Margaret</dc.contributor.illustrator>

NOTE: <dc:contributor.photographer>, <dc:contributor.advisor>, <dc:contributor.editor>, <dc.contributor.illustrator>, <dc.contributor.other> are non-standard Dspace tags used only within OAKTrust, but not in the other repositories at TAMU.

Mapping to MODS:

<mods:name type="personal" authority="naf">

    <mods:namePart type="family">Sorrenson</mods:namePart>

    <mods:namePart type="given">Margaret</mods:namePart>

    <mods:role>

<mods:roleTerm type="text" authority="marcrelator">illustrator</mods:roleTerm>

</mods:role>

</mods:name>

Note: "Illustrator" is the MARC relator term used to specify the role of the contributor in this example. The resource being described is a book with illustrations, where text was the primary content. Other potential relator terms may be selected for other types of resources. Consult the *MARC Relator Code and Term Lis*t at https://www.loc.gov/marc/relators/relaterm.html for a list of terms and their definitions.

Related resource (Recommended, Repeatable)

Definition: A resource (either digital or print) that the resource being described is related to

Usage guidelines:

This element is strongly recommended if a resource is a subunit or component of a larger resource (e.g., a chapter of a book) when the other components are also included in the TAMU repository. In other circumstances, use judgment about whether to record this element.

For instance, if the resource is a digitized chapter or an individual poem from a book, record the title of the original book that it comes from. Other examples of possible related resources include a larger series of which the resource is a part, other versions of the resource, and companion volumes.

In addition to recording the title, one may also repeat this element and provide the URL, if one exists, to the related resource in the repository.

Mandatory practice:

If using Dublin Core:

Map this element to the appropriate element depending on the type of relationship:

<dc:relation.isPartOf>	A related resource in which the described resource is physically or logically included.
<dc:relation.isFormatOf>	A related resource that is substantially the same as the described resource, but in another format.
<dc:relation.HasPart>	A related resource that is included either physically or logically in the described resource.
<dc:relation.isVersionOf>	A related resource of which the described resource is a version, edition, or adaptation.

\<dc:relation.HasVersion\>	A related resource that is a version, edition, or adaptation of the described resource.
\<dc:relation.isReferencedBy\>	A related resource that references, cites, or otherwise points to the described resource.
\<dc:relation.Requires\>	A related resource that is required by the described resource to support its function, delivery, or coherence.
\<dc:relation.Replaces\>	A related resource that is supplanted, displaced, or superseded by the described resource.
\<dc:relation.isReplacedBy\>	A related resource that supplants, displaces, or supersedes the described resource.

If none of the above elements adequately describe the related resource, map it to <dc:relation>

But in Dspace only:

If a URI is recorded, map it to: <dc.relation.uri> for OAKTrust.

If a title of a larger series is recorded, map it to: <dc:relation.ispartofseries>.

If a related resource is something that the described resource is based on, or adapted from, map it to the element <dc:relation.isbasedon>.

Note: <dc:relation.uri>. <dc:relation.isbasedon> and <dc:relation.ispartofseries> are non-standard Dspace tags used only within OAKTrust, but not in the other repositories at TAMU.

If using MODS:

Map this element to <relatedItem>. If recording a related resource that the item being described is a part of, set the attribute "type" to the value "host." If the resource has a different kind of relationship, set it to the appropriate value listed under ELEMENT DESCRIPTION—ATTRIBUTES—TYPE in the DLF/Aquifer MODS guidelines at https://www.loc.gov/standards/mods/userguide/relateditem.html

For example, set it to "constituent" if one is recording a resource that is part of the item being described. Set it to, "series" if one is recording the name of a series of which the item being described belongs to. Set it to "otherVersion" if one is recording another version of the resource being described.

If a URI is recorded, map it to <mods:url> which is a subelement of <mods:location> which in turn, is a subelement of <mods:relatedItem>.

Examples of Use:

Mapping to Dublin Core:

<dc:relation.IsPartOf>Anthology of American Horror Short Stories</ dc:relation.IsPartOf>

<dc:relation.isVersionOf>Necrology of alumni of Harvard college, 1851-52 to 1862-63</dc.relation.isVersionOf>

<dc:relation.isVersionOf>http://hdl.loc.gov/umich.dli.moa/AGE3371</dc.relation.isVersionOf>

But In Dspace:

<dc:relation.uri>http://hdl.loc.gov/umich.dli.moa/AGE3371 </dc:relation.uri>

Mapping to MODS:

<mods:relatedItem type="host">

    <mods:titleInfo>

        <mods:title> Anthology of American Horror Short Stories </mods:title>

    </mods:titleInfo>

    </mods:relatedItem>

<mods:relatedItem type="otherVersion">

    <mods:titleInfo>

        <mods:title> Necrology of alumni of Harvard college, 1851-52 to 1862-63</mods:title>

    </mods:titleInfo>

    <mods:location>

        <mods:url> http://hdl.loc.gov/umich.dli.moa/AGE337</mods:url>

    </mods:location>

</mods:relatedItem>

Original publisher (Recommended, repeatable)

Definition: Entity that published a resource before it was digitized but is NOT the same as the institution or department that contributed its collection to the repository.

Usage guidelines

It is recommended to record this element if a resource was published prior to digitization and the original publishing entity is not equivalent to the institution or department that contributed the collection to the repository.

Record the name of the original publisher. Prefer the controlled form of the name in the Library of Congress' National Authority File (LCNAF) if one is available.

Mandatory practice: If this element is recorded as an access point, map it to <dc:publisher> when using Dublin Core.

If using MODS:

Map this element to <mods:publisher> if a resource is "born digital." If it has previously been published in a non-digital form, map it to a subelement of <mods:originInfo> called <mods:publisher>.

Map this element to <mods:publisher> (which is NOT subelement of

Examples of Use:

Mapping to Dublin Core:

    <dc:publisher> American Society of Civil Engineers</dc:publisher>

Mapping to MODS:

If born digital:

<mods:publisher> American Society of Civil Engineers</mods:publisher>

If previously published in non-digital form:

<mods:originInfo eventType="publication">

       <mods:publisher> American Society of Civil Engineers</mods:publisher>

   </mods:originInfo>

Physical Extent (Recommended, repeatable)

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:

It is recommended to record the number of units, if there are more than one. One may follow this with physical dimensions if they are judged as useful to record. The latter may be more helpful for nontextual resources (e.g., the original dimensions of a work of art that was scanned) than for digitized texts.

If recording the number of units, record the number followed by a term for the specific units of the resource (e.g., "7 photographs" or "36 pages").

If recording physical dimensions, record height x width (followed by depth if describing a three-dimensional object), followed by abbreviations units of measurement in either centimeters or inches. For instance, one might record dimensions of a photograph as 18 x 13 cm., or 4 x 5 in. A box's dimensions could be recorded as: 57 x 79 x 32 cm.

If recording both number of units and physical dimensions, include in the same field (or column, if using a spreadsheet to input metadata). Separate them with comma, instead of with a double pipe (||) symbol.

For example:

26 pages

2 photographs, 4 x 5 in.

2 plaster models, 57 x 79 x 32 cm. and 51 x 65 x 20 cm.

Mandatory practice: If using Dublin Core, map this element to <dc:format.extent>

If using Dspace, map it <dc:format> since <dc.format.extent> is used for a different purpose within OAKTrust.

If using MODS, map this element to <mods:extent> (a subelement of <mods:physicalDescription>)

Examples of Use:

Mapping to Dublin Core:

<dc:format.extent>2 photographs, 4 x 5 in.</dc:format.extent>

But in Dspace:

<dc:format>2 photographs, 4 x 5 in.</dc:format.extent>

NOTE: In Dspace, <dc.format.extent> is only used to map to size and duration of digital files.

Mapping to MODS:

<mods:physicalDescription>

      <extent>2 photographs, 4 x 5 in.</extent>

</mods: physicalDescription/>

<mods:physicalDescription>

      <extent>26 pages</extent>

</mods: physicalDescription/>

Sponsor (Recommended, repeatable)

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 the name of the sponsor. It is recommended to use controlled forms of names such as ones found in the Library of Congress Name Authority File, if available.

If the sponsor is a person whose name is not controlled in the Library of Congress Name Authority File, construct a name using the guidelines described below:

Enter the components of a name in the following order: {Last name}, {First name or initial}, {Middle name or initial, if known}.

For example: Smith, John H.

If desired, one may additionally record a note explaining the sponsor's role for the benefit of the public.

Mandatory practice: If this element is recorded as an access point, map it to <dc:contributor> when using Dublin Core.   If it is recorded in a note, map it to <dc:description>

If using Dspace, and the element is recorded as note, map it <dc:description.sponsorship>. But if it just a name is given, map it to <dc:contributor.sponsor> . The latter elements are non-standard Dspace tags used only within OAKTrust, but not in the other repositories at TAMU.

If using MODS, map this element to <mods:name> and set the attribute "type" to "corporate" or "personal" depending on whether the sponsor is an organization or a person. If the sponsor

is a person, separate family name and given name (including middle name or initial if available) using the subelement <namePart>. Use <mods:role> to specify the role as "sponsor."

If this element is recorded as a note, map it to <dc:description> if using Dublin Core. If using MODS, map such a note to <mods:note>.

Examples of Use:

Mapping to Dublin Core:

- <u>If recorded as an access point:</u>

  <dc:contributor> United States. Agency for International Development</dc:contributor>

  <dc:contributor>Smyth, Bridget P.</dc:contributor>

  But in Dspace:

  <dc:contributor.sponsor>Smyth, Bridget P.</dc:contributor.sponsor>

Note: <dc:contributor.sponsor > is a non-standard Dspace tag used only within OAKTrust, but not in the other repositories at TAMU.

- <u>If recorded as a note:</u>

  <dc:description> This document is part of the Fred C. Cuny collection digitization project, funded by USAID. </dc:description>

  <dc:description>This document is part of an exhibition sponsored in part by Bridget P. Smythe of Houston, Texas</dc:description>

  But in Dspace:

  <dc:description.sponsorship> This document is part of the Fred C. Cuny collection digitization project, funded by USAID</dc:description.sponsorship>

Note: <dc:description.sponsorship> is a non-standard Dspace tag used only within OAKTrust, but not in the other repositories at TAMU.

Mapping to MODS:

- <u>If recorded as an access point:</u>

  <mods:name type="corporate" authority="naf">

  <mods:namePart> United States. Agency for International Development </mods:namePart>

  <mods:role>

  <mods:roleTerm type="text" authority="marcrelator">sponsor</mods:roleTerm>
  </mods:role>

```
        </mods:name>

        <mods:name type="personal" authority="naf">

                <mods:namePart type="family">Smythe</mods:namePart>

                <mods:namePart type="given">Bridget P.</mods:namePart>

            <mods:role>

                <mods:roleTerm type="text" authority="marcrelator">sponsor</mods:roleTerm>

                </mods:role>

        </mods:name>
```

- <u>If recorded as a note:</u>

  <mods:note>This document is part of the Fred C. Cuny collection digitization project, funded by USAID. </mods:note>

  <mods:note> This document is part of the exhibition sponsored in part by Bridget P. Smythe of Houston, Texas </mods:note>

The "Non-Core" Elements Part 2: Elements that are Optional

Source Collection (Optional, Repeatable)

Definition: The original collection that a resource belonged to before it was digitized. For example, this may be a collection of manuscripts in Cushing.

Usage guidelines:

Record the formal name of the collection that identifies the archival or collection source of the resource.

Mandatory practice: Map this element to the <dc:relation> element if using Dublin Core. If using MODS, map it to <mods:relatedItem> and set the "type" attribute to the value "host."

Examples of Use:

Mapping to Dublin Core:

   <dc:relation>Don Kelly Research Collection</dc:relation>

Mapping to MODS:

<mods:relatedItem type="host">

    <titleInfo>

        <title> Don Kelly Research Collection </title>

    </titleInfo>

</mods:relatedItem>

Original resource (Optional, repeatable)

Definition: A related resource from which the described resource is derived either in whole or part.

Usage guidelines:

Note: This element is not used within OAKTrust. However, it may be used in collections that are intended for other repository platforms at TAMU.

One may record this element in several ways:

- Record the title of the original resource.
- Record as a note (e.g., "Scanned from the print version of the map held in in the Map and GIS Library of Texas A&M University.")

One may use one or more of the above options, repeating this element as necessary.

If the title of the resource being described is identical to the original resource, it is preferred to apply the second option only.

Mandatory practice: Map this element to the <dc:source> element if using Dublin Core.

In Dspace, do NOT use this element. It is used to harvest metadata from other sources but not used for original metadata input.

If using MODS, map it to <mods:relatedItem> element and set the attribute type to the value "original." If the title is recorded, map it to the subelement <titleInfo><title>. If a note is given about where the original resource may be accessed, map it to the subelement <location> If a note is given that is more general in nature, map it to the subelement <note>.

Examples of Use:

Mapping to Dublin Core:

<dc:source>1830 Map of Texas</dc:source>

<dc:source> Scanned from the print version of the map held in in the Map and GIS Library of Texas A&M University </dc:source>

<dc:source>Image from page 63 of the 1930 edition of "Hamlet" by the Cambridge University Press</dc:source>

Mapping to MODS:

<mods:relatedItem type="original">

    <mods:titleInfo>

        <mods:title>1830 Map of Texas</mods:title>

    </mods:titleInfo>

    <mods: note> Scanned from the print version of the map held in in the Map and GIS Library of Texas A&M University</mods:note>

</mods:relatedItem>

<mods:relatedItem type="original">

    <note>Image is scanned from page 63 of the 1930 edition of "Hamlet" by the Cambridge University Press </note>

</mods:relatedItem>

Notes (Optional, Repeatable)

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. Examples may be information about exhibits or donors, a note about the quality of a scanned image, or a statement that certain pages are missing from the scanned image of a manuscript.

Mandatory practice: Map this element to the <dc:description> element if using Dublin Core. If describing the history of a resource's ownership, map it to <dc:provenance>.

But if using Dspace, map a note describing the history of a resource's ownership, map it to the tag <dc:description.provenance>

It should be noted that OAKTrust has its own Dspace fields that are not standard, and not used in any other repository at TAMU. Examples of such fields are: <dc:description.provenance> and <dc:description.uri> (If one wants to link to an existing web page rather than supply the text of a note).

If using MODS, map it to <mods:note>.

Examples of Use:

Mapping to Dublin Core:

<dc:description> This publication may contain explicit sexual literary descriptions and/or artistic depictions</dc:description>

<dc:description> 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</dc:description>

<dc:provenance>This item was previously owned by Alfred J. Sloane, Texas A&M University alumnus, Class of 1988</dc:provenance>

But in Dspace:

<dc:description.provenance>This item was previously owned by Alfred J. Sloane, Texas A&M University alumnus, Class of 1988</dc:description.provenance>

Mapping to MODS:

<note> This publication may contain explicit sexual literary descriptions and/or artistic depictions</note>

<note> 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</note>

Original Place of publication, production or manufacture (Optional, repeatable)

Definition: Place a resource was originally published, produced, or manufactured.

Usage guidelines:

Use to designate the place of publication for the original (usually print) production of an item. Use for resources that have been digitally reformatted as opposed to resources that were "born digital."

If a collection is intended for OAKTrust, record this element as a note (e.g., "Originally published in New York").

If a collection is intended for other databases, one may record it either as a note or as the name of a place (e.g., "New York, NY").

In addition, one is encouraged to repeat this element and record the country as a 3-letter code form according to the ISO 3166 (https://www.iso.org/obp/ui/)

Example:

Germany

ger

Mandatory practice: If using Dublin Core, and only place name is given, there is no tag to map it to where this information could display in a meaningful way to users. But if the place name appears in a note, map it to the <dc:description> element.

If using MODS, map this element to <mods:placeTerm> (a subelement of "place", which is a subelement of "originInfo"). Set the <mods:originInfo> attribute for "eventType" to one of the following values: production, publication, distribution, or manufacture.

Examples of Use:

Mapping to Dublin Core:

<dc:description>Originally published in New York</dc:description>

<dc:description>Originally produced in Germany</dc:description>

Mapping to MODS:

<mods:originInfo eventType="publication">

      <mods:place>

            <mods:placeTerm type="text">New York, N.Y.</placeTerm>

      </mods:place>

</mods:originInfo>

<mods:originInfo eventType="publication">

      <mods:place>

            <mods:placeTerm type="text">Originally published in New York</placeTerm>

</mods:place>

</mods:originInfo>

<mods:originInfo eventType="production">

        <mods:place>

                <mods:placeTerm type="code" authority="iso3166">ger</placeTerm>

                <mods:placeTerm type="text">Germany</placeTerm>

        </mods:place>

</mods:originInfo>

Audience level (Optional, repeatable)

Definition: A class of entity for whom the resource is intended or useful.

Usage guidelines:

Audience level refers to a targeted group of people the item is designed for (e.g., "juvenile"). One may optionally record this element for resources that are targeted at a specific category of people other than the general academic community at TAMU and other institutions.

This element may be recorded as a word, phrase or sentence. If recording it as a word, it is recommended to select a controlled term from the *MARC Target Audience Term List* at https://www.loc.gov/standards/valuelist/marctarget.html

Mandatory practice: If using Dublin Core, map this element to the <dc:audience>. If using MODS, map it to <mods:targetAudience>.

Examples of Use:

Mapping to Dublin Core:

<dc:audience>Intended for a juvenile audience</dc:audience>

Mapping to MODS:

<targetAudience>juvenile</targetAudience>

<targetAudience authority="marctarget">adolescent</targetAudience>

Classification (Optional, repeatable)

Definition: A designation applied to a resource that indicates the subject by applying a formal system of coding and organizing resources according to subject areas

Usage guidelines:

If a resource is owned by a library that has assigned a formal classification number to it (e.g., a Library of Congress number), this number may be optionally recorded if it is judged as useful to the target audience of a collection.

Mandatory practice:

If using Dublin Core, map this element to <dc:description>.

If using Dspace, map it to the appropriate Dspace Dublin Core qualified field: <dc:subject.ddc> (for Dewey Decimal numbers),<dc:subject.lcc> (for Library of Congress classification numbers), and <dc.subject.udc> (for Universal Decimal Classification).   If a classification schema other than LCC, UDC or DDC is utilized, use the generic field <dc:subject.classifiction>. (The latter element is a non-standard Dspace tag used only within OAKTrust, but not in the other repositories at TAMU.)

For example, for Patents in OAKTrust,, use:
<dc:subject.classification>56/13.5</dc:subject.classification>

If using MODS, map this element to <mods:classification>. Set the value of the attribute "authority" to the appropriate code according to classification scheme used according to *Classification Scheme Source Codes* at
https://www.loc.gov/standards/sourcelist/classification.html

Examples of Use:

Mapping to Dublin Core:

<dc:description> JK609.M2</dc:description>

But in Dspace only:

<dc:classification.lcc>PS3850</dc:classification.lcc>

<dc:subject.classification> >56/13.5</dc:subject.classification>

Note: <dc:classification.lcc>, <dc.subject.udc> , and <dc:subject.classification> are non-standard Dspace tags used only within OAKTrust, but not in the other repositories at TAMU.

Mapping to MODS:

<mods:classification>56/13.5</mods:classification>

<mods:classification authority="lcc">JK609.M2</mods:classification>

Note: In the last example above, "lcc" is the code used for the Library of Congress classification scheme according to *Classification Scheme Source Codes* at https://www.loc.gov/standards/sourcelist/classification.html

Physical Item Identifier (Optional, repeatable)

Definition: Local identifier used to identify a physical form of the resource that existed prior to digitization.

Usage guidelines:

One may optionally record locally assigned identifiers, such as accession numbers or Voyager record numbers, for the physical form of a resource if it is judged as useful to the target audience of a collection.

Mandatory practice: Map this element to <dc:identifier> if using Dublin Core. If using MODS, map this element to <mods:identifier> and set the attribute "type" to the value of "local."

Examples of Use:

Mapping to Dublin Core:

<dc:identifier> APL2012</dc:identifier>

Mapping to MODS

<mods:identifier type="local"> APL2012</mods:identifier>

Physical Item location (optional, repeatable)

Definition: The institution, library, etc. where the physical form of the resource is stored, and information regarding how it can be accessed.

Usage guidelines:

One may record a note about where the physical form of the resource is located if this information is judged helpful to users who may want to travel to that location to access it. This may include the name of the institution or library where it is stored, and information about the call number or other information used to locate the item.

Alternatively, one may record the name of the library or institution at where the item is held and its shelf location as separate Physical Item Location elements.

Mandatory practice: Map this element to <dc:description> if using Dublin Core.

If using MODS, map this element to <mods:note>, a subelement of <mods:copyInformation> and <mods:holdingSimple> under the MODS element <mods:location>.

Examples of Use:

Mapping to Dublin Core:

<dc:description>This item is housed in Cushing Memorial Library; Box 7-Folder 157; CVM 100/ BOX I , Pre-1916; Box 1-129z.</dc:description>

Mapping to MODS

- If recorded as a single note:

<mods:location>

    <mods:holdingSimple>

        <mods:copyInformation>

            <mods: authority="marcform">print</form>

            <mods:note> This item is housed in Cushing Memorial Library; Box 7 Folder 157; CVM 100/ BOX I , Pre-1916; Box 1-129z. </mods:note>

        </mods:copyInformation>

    </mods:holdingSimple>

</mods:location>

- If institution and shelf location are recorded as two separate elements:

<mods:location>

    <mods:physicalLocation>Cushing Memorial Library</mods:physicalLocation>

    <mods:holdingSimple>

        <mods:copyInformation>

            <mods: authority="marcform">print</form>

            <mods:shelfLocator> Box 7-Folder 157; CVM 100/ BOX I , Pre-1916; Box 1-129z</mods:shelfLocator>

        </mods:copyInformation>

    </mods:holdingSimple>

```
</mods:location>
```

Appendix 1: Links to Standards and Controlled Vocabularies Referenced in the Guidelines:

Some metadata elements require the use of codes or formatting that adhere to specific standards, or controlled terms selected from particular vocabularies or thesauri. For other elements, the use of such sources is strongly recommended. The following is a comprehensive compilation of links to these sources.

Names of Persons, Families, and Organizations:

- **Library of Congress Name Authority File (LCNAF)** at
  http://id.loc.gov/authorities/names.html

Roles of Persons, Families, and Organizations including publishers), for terms to be used with the MODS schema:

- **MARC Code List for Relators**
  http://www.loc.gov/marc/relators/relaterm.html

Rights/Access Statements:

- **RightStatements.org**
  http://rightsstatements.org/en/

Reformatting:

- **DLF/Aquifer MODS guidelines**
  http://www.loc.gov/standards/mods/userguide/physicaldescription.html#digitalorigin

  Use the recommended phrases in this resource to record whether a resource was: "born digital," "reformatted digital," "digitized microfilm,", "digitized other analog."

Content Type:

- **DCMI Type vocabulary**
  http://dublincore.org/documents/dcmi-type-vocabulary/

Languages:

  The following ISO standards contain three-letter codes for languages (e.g., "eng")

- **ISO 639-2b** (http://www.loc.gov/standards/iso639-2/php/code_list.php)

This ISO standard supersedes the 2-digit language codes used in ISO 639-2. When there are multiple codes for the same language, choose the ones labeled (T) instead of (B).

Countries

- **ISO 3166 Country Codes**
  https://www.iso.org/obp/ui/

Dates

- **ISO 8601**
  https://www.iso.org/standard/40874.html

Standard Identifiers:

- **Standard Identifier Source Codes**
  https://www.loc.gov/standards/sourcelist/standard-identifier.html

  This resource contains a list of source codes for standard identifiers (e.g., DOI, etc.) that can be used in mappings of this element to the MODS schema.

Audience Level Terms

- **MARC Target Audience Term List**
  https://www.loc.gov/standards/valuelist/marctarget.html

  This website contains a list of controlled terms for describing the intended audience of a digital resource ("juvenile", "specialized," etc.)

Subjects (Controlled):

Here are some potential thesauri that may be used for recording controlled terms for subjects:

- **Library of Congress Subject Headings and Name Headings:**
  https://authorities.loc.gov/

  At this website, one may search any topic using "Subject Authority Headings" to find controlled Library of Congress subject headings. One may also search under "Name

Authority Headings" to find controlled names of persons, families and organizations that may be treated as the subjects of a particular resource.

- **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/

- **Getty's Thesaurus of Geographic Names**
  http://www.getty.edu/research/conducting_research/vocabularies/tgn/

- **Geonames**
  https://www.geonames.org/

- **National Agricultural Thesaurus**
  https://agclass.nal.usda.gov/

  Use the following resource to look up codes for different thesauri when mapping this element to the MODS schema. (It may also be useful for discovering other thesauri that may be potentially used):

- **Subject Heading and Term Source Codes**
  (https://www.loc.gov/standards/sourcelist/subject.html)

Genres:

- **MARC Genre Term List**
  https://www.loc.gov/standards/valuelist/marcgt.html

  Use terms from this list. They may be used in conjunction with any other vocabulary that may be appropriate in addition to them. The other sources below may also be used in lieu of terms from the MARC Genre Term List, if none are adequate.

- **Library of Congress Genre/Form Terms**
  https://www.loc.gov/aba/publications/FreeLCGFT/GENRE.pdf

- **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/

- **RBMS Controlled Vocabularies Genre Terms**
  https://rbms.info/vocabularies/genre/alphabetical_list.htm

  Use the following resources to look up codes for different thesauri for genre terms in order to map this element to the MODS schema. (It may also be useful for discovering other thesauri that may be potentially used):

- **Genre/Form Code and Term Source Codes**
  https://www.loc.gov/standards/sourcelist/genre-form.html

- **Subject Heading and Term Source Codes**
  https://www.loc.gov/standards/sourcelist/subject.html

Classification Schemes:

Use the codes below when mapping to MODS:

- **Classification Scheme Source Codes**
  https://www.loc.gov/standards/sourcelist/classification.html

Appendix 2:

Examples of minimal, standard, full records in OAKTrust

Note: The following examples show the types of metadata that would be **manually supplied** by metadata providers at different levels of "fullness" for the repository. The URL (i.e., handle) to the digitized resource being described does not appear in these examples because they are system-generated and do not need to be manually supplied.

Example 1: Minimal Level Record

Title	Texas beyond the periphery: an archaeological study of the Spanish missions during the 18th 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/
Rights/Access	Openly accessible to the public.
Filename	1556635.pdf
Reformatting	reformatted digital
Subject	Spanish mission buildings—Texas
Subject	Anthropology

Example 2: "Standard" Level Record

Title	Texas beyond the periphery: an archaeological study of the Spanish missions during the 18th century
Content type	text
Date Issued	1994
Abstract/Summary	The majority of Spanish settlement in Texas took place during the 18th 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/
Rights/Access	Openly accessible to the public.
Filename	1556635.pdf
Reformatting	reformatted digital
Language	eng
Subject	Spanish mission buildings—Texas
Subject	Anthropology
Subject	Spaniards—Texas--Antiquities
Subject	Texas--Antiquities

Example 3: Fuller Level Record

Title	Texas beyond the periphery: an archaeological study of the Spanish missions during the 18th century
Alternative Title	An archaeological study of the Spanish missions during the 18th century
Content type	text
Date Issued	1994
Abstract/Summary	The majority of Spanish settlement in Texas took place during the 18th 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/
Rights/Access	Openly accessible to the public
Filename	1556635.pdf
Reformatting	reformatted digital
Language	eng
Related resource	Spanish missions in Texas during the 18th 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

NOTE: the record in this example represents the fullest level of information that one might add. It is up to the metadata provider how much information is necessary to input beyond the "core" metadata elements shown in Examples 1 and 2 in this appendix.