



## Metadata Best Practices

# Mississippi Digital Library

## Metadata Best Practices

This document provides instructions for creating and adding metadata for manuscripts, documents, photographs, and related materials.

Metadata records for the Mississippi Digital Library (MDL) are based on the Dublin Core Metadata Initiative (DC) data element set. DC uses fifteen base elements, all of which are optional and repeatable. The MDL metadata fields are mapped to the appropriate DC elements in CONTENTdm. Other guidelines used for instructions in creation of metadata records include:

- *Archives, Personal Papers, and Manuscripts*
- *DACS: Describing Archives, A Content Standard*
- *Anglo-American Cataloging Rules*

These guidelines are interpreted in a collaborative process that includes the Catalog Librarians in Bibliographic Services and Librarians in Digital Collections at the University of Southern Mississippi. Guidelines for the creation of metadata records are subject to change when it is deemed necessary.

Subject headings and Name Authority Records in the thesaurus are taken from the Library of Congress Subject Headings and National Authority File (NAF). Local authority records are created for names used in the MDL but for which Name Authority Records are not submitted to NACO.

Metadata records function from specific information and minute details are important, especially punctuation and capitalization. Three steps make up the work process.

1. Examine the document (either the scan or the original).
2. Access the finding aid for the collection to which the document belongs or the catalog record for the document, if one exists.
3. Following Best Practices below, create the metadata record.

### Local and National Resources

- Civil Rights in Mississippi Thesaurus: [http://www.lib.usm.edu/techserv/cat/tools/crm\\_index](http://www.lib.usm.edu/techserv/cat/tools/crm_index)
- Civil Rights in Mississippi Digital Archive: <http://digilib.usm.edu/crmda.php>
- Dublin Core Metadata Initiative: [www.dublincore.org](http://www.dublincore.org)
- Library of Congress Authorities: <http://authorities.loc.gov/>
- Anglo-American Cataloging Rules: <http://desktop.loc.gov/>

## List of Metadata Fields

The order of these elements should be consistent across the creating institutions.

1. Object name
2. Identifier
3. Alternate ID
4. Title
5. Alternate title
6. Description
7. Creator
8. Searchable date
9. Date
10. Coverage (Time Period)
11. Time period
12. Subject
13. Mississippi county
14. Geographic location
15. Resource type
16. Format
17. Media format
18. Language
19. Publisher
20. Contributors
21. Notes
22. Rights
23. Contributing institution
24. Collection
25. Source
26. Digital repository
27. Digital collection
28. File size
29. File extension
30. Width
31. Height
32. Color space
33. Bit depth
34. Date digital
35. Capture method
36. Master image
37. Processing software
38. Record created by
39. Hidden notes
40. Custom searches
41. IP resolution
42. Transcript
43. File name

## Object name

The Object Name field is used specifically for compound objects. It identifies the directory that houses the images that make up the compound object it must be listed first.

The MDL staff at USM will assign an Object Name as necessary.

## Identifier

A unique identifier is assigned to each document. It contains an institutional identifier, as well as letters and/or numbers identifying the collection and item. Each institution keeps its own file naming system, but is uniquely identified in MDL.

The MDL contains items from multiple institutions. If the institution has an OCLC code, add the lower case code and a period to the beginning of each file name. If the institution does not have an OCLC code, a code will be assigned to the institution.

The Identifier contains 3 main sections

1. Institutional code based on OCLC code or assigned
2. Collection identification
3. Item number

➤ They are arranged as: institution code.collection.item #

Example of a manuscript from the Theodore Bilbo Papers (M002) at USM:

*mus.m002.0001*

Example of a photograph from the Marion Stark Gaines Photograph Collection at the Columbus-Lowndes Public Library

*wz2.Gaines.002*

Finding aids for manuscript collections should be named: institution code.fa.collection #.

*mcd.fa.m017*

The Identifier is assigned to the digital object, whether it is a single object, such as a photograph, or a compound object, such as a letter with multiple pages. In compound objects, the individual pages do not have unique Identifiers; instead, each page is assigned a file name based on the identifier.

- For example, a 2-page letter may have the identifier mus.m002.001
  - the file name for page 1 will be: mus.m002.001.01
  - the file name for page 2 will be: mus.m002.001.02
- For more information on this, see File Name below.

## Alternate ID

The Alternate ID is used when a document receives a new file name or identifier. The new file name is entered into the Identifier field and the old file name is entered into the Alternate ID field.

<i>Old file name (Alternate ID)</i>	<i>006157</i>
<i>New file name (Identifier)</i>	<i>mus.m246.001p</i>

Do not complete this field unless renaming a digital file.

## Title

The Title should be taken from the document, omitting initial articles. In the absence of a title on the item, use the item title as found in the Finding Aid. If there is no title on the finding aid, create a title that is descriptive and concise. Capitalize only the initial letter of the first word and proper nouns.

Letters, Memos, and Other Correspondence – Letters should be named in the following basic format. Use this format also for Memos and other forms of correspondence.

Letter from \_\_\_\_\_ to \_\_\_\_\_; Date

Memo from \_\_\_\_\_ to \_\_\_\_\_; Date

*Letter from Zoya Zeman to Erwin D. Zeman; March 5, 1964*

*Memo from Victoria Gray (Adams) to friends and supporters of MFDP; February 10, 1966*

*FBI teletype from Director to New Orleans; July 10, 1964*

Note attributed authors and/or recipients with question marks in brackets.

*Memo, A. [Alex?] Rosen to Mr. [Alan H.?] Belmont; July 21, 1964*

If there is no date on the document and it is not possible to confer a date, record [Undated]

*Letter from Zoya Zeman to Erwin D. Zeman; Undated*

*Memo from MFDP to teachers; Undated*

If it is known that the document was produced in a certain year but it is not dated, use square brackets around the date in the Title and Coverage fields.

*Letter from Zoya Zeman to Erwin D. Zeman; [1964]*

*Memo from MFDP to teachers; [1965]*

If there is no recipient listed on the document, record:

Letter from \_\_\_\_\_; Date

*Letter from [author]; [date]*

If there is no author listed on the document, record:

Letter to \_\_\_\_\_; Date

*Letter to [recipient]; [date]*

Brochures, Flyers, etc. – Brochures and Flyers that are untitled should be named according to the publishing organization or the subject of the work.

*Mississippi Freedom Democratic Party Brochure*  
*Mississippi Workshop Flyer*

Photographs – Photographs without a name written on them should be named according to the image. There is no need to include “Photograph of” at the beginning of the title

*Tomato Canning Club*  
*President William D. McCain*

Newspapers or items in a series – The title of the series, followed by the volume and issue numbers (example from the Zwerling collection):

*Student voice, Vol. 5, no. 17*

Source for the above formats: *Archives, Personal Papers, and Manuscripts*

p. 9, 1.0B1. Chief source of information  
p. 11, 1.0F. Inaccuracies and extrapolations  
p. 13, 1.1B2. Supplied titles

Finding Aids – Accept the title as applied by the home institution. A date is not needed for a finding aid.

*Finding aid for the Thomas G. Abernethy Collection (MUM00001)*  
*Inventory of the Florence Sillers Ogden Papers*

Source for finding aids: *Describing Archives: A Content Standard (DACS)*

## **Alternate title(s)**

Use this field for one or more alternate titles if needed with a separator. Capitalize only the initial letter of the first word and proper nouns. Separate multiple entries with a semi-colon.

Finding Aids: When a finding aid is titled “Inventory of...” or “[Name] collection” or “Interview of...” etc., do not add an Alt Title “Finding aid for...”

## **Description**

This is a brief summary beginning with a standardized phrase. Individual documents begin with the name of the collection. Finding aids begin with a phrase using those words. Insert a line break.

*From the Botnick (A.I. & Fay) Civil Rights Collection.*  
*From the Ben-Ami (Rabbi David Z.) Papers.*  
*Finding aid for [collection name].*

Follow the standardized phrase with a short abstract in full sentences with correct grammar and punctuation. Avoid editorial comments. If the document is a transcribed copy, note this at the beginning of the abstract information.

*Transcribed copy of a letter ...*

This field is a good place to record important people whose names appear in a document, but who are not really the subject of the document. Avoid long lists of names in this field.

## Creator

The creator is the author of a document, the person who took a photograph, the person being interviewed for an oral history, etc. Information about the creator should be taken from the original document or the Finding Aid or the catalog record. Record the name as:

*Last name, First name, dates.*

If the author has a Library of Congress name authority record, use the name as it appears there. If not, use the name on the document.

*Adams, Victoria Gray, 1926-*  
*Bilbo, Theodore Gilmore, 1877-1947.*

Finding aids will have the name of the home institution in the creator field and should be the authorized name of the institution.

*University of Mississippi.*  
*Delta State University.*

### **If the author/creator is unknown, leave blank.**

If an item has more than one creator, list each name in alphabetical order. Separate multiple entries with a semi-colon. List added authors in this manner. An item written by Zoya Zeman and Buster Brown would be recorded:

*Brown, Buster, 1937-1975.*  
*Zeman, Zoya, 1943-*

Creators should be followed with a period, unless the term ends with a dash (ex: Evers, Charles, 1922- ). Separate multiple entries with a semicolon.

## Date searchable

The Date Searchable field indicates the date the item was originally produced. Take the date from the original, the finding aid or catalog record (if a date is present). If an item is undated, leave this field blank.

The Date Searchable field is used for searching dates in the content management system. It is formatted as a date field and has specific formatting requirements. This field is not visible in the public web interface.

Please use the following date formats. Text is not allowed.

- yyyy
- yyyy-mm
- yyyy-mm-dd

Dates must be valid for the given month and year. A date in February cannot be greater than 28 except in a leap year (29); a date in March cannot be greater than 31.

The year must be shown with four digits.

If a document has no date but it is known that the document was produced in a certain year, use square brackets around the date in the Title and Date fields. Enter the date WITHOUT brackets in the Date Searchable field. Refer to Date for more information on dates with brackets.

- If the document was produced on one specific date: enter *1998-05-15* in the Date Searchable field and *15 May 1998* in the Date field.
- If document is undated, but the date is known: enter *1997-06-15* in the Date Searchable field and *[15 June 1997]* in the Date field.
- If the document is undated, but a probable date is known: enter *1996-07* in the Date Searchable field and *[June 1996 ?]* in the Date field.

### Date Ranges

Date ranges can only be entered as yyyy-yyyy. No months or days can be entered as date ranges in this field. Date ranges with months and days should be added in the Date Field

- If the document was produced over more than one day in the same month: enter *1998-05* in the Date Searchable field and enter *12-15 May 1998* in the Date field.
- If the document was produced over more than one month in the same year: enter *1998* in the Date Searchable field and enter *May-June 1998* in the Date field.
- If the document was produced over more than one year: enter *1998-1999* in both the Date Searchable and the Date fields.

### Circa Dates

Circa dates should be entered as date ranges.



- If the document is dated circa 1995, enter *1993-1997* in the Date Searchable field and *circa 1995* in the Date field. (a five year date range)
- If the document is dated circa 1990s, enter *1990-1999* in the Date Searchable field and *circa 1990s* in the Date field.
- If the document is dated circa May 1995, enter *1995-05* in the Date Searchable field and *circa May 1995* in the Date field.

## Date

The Date field indicates the date the item was originally produced. Take the date from the original or finding aid (if a date is present). The Date field should be used in conjunction with the Date Searchable field and it should be completed for every item if possible.

Please use the following date formats.

- yyyy
- yyyy-mm
- yyyy-mm-dd

The following exceptions to formatting are allowed:

If the date is known, but it is not on the item (e.g., a photo of an event known to have happened during Freedom Summer), record the date or year in square brackets.

*[Certain date from another source]*  
*[1964]*

If the date is probable (from correspondence, etc., related to Freedom Summer, and probably from 1964, but we can't be 100% sure of it), record the year with a question mark in square brackets.

*[Probable date from another source]*  
*[1964?]*

If the date is unknown but can be narrowed to a decade or part of a decade, use circa to indicate an approximate date.

*circa 1960s*

**If the date is simply unknown, leave blank.**

Refer to Date Searchable for information on date ranges and circa dates.

## Coverage: (time period)

The Coverage field identifies the time period covered in each document and can be derived from the document itself. It is usually not one specific date.

If the time period is a particular month in a specific year: [Month Year]

*August 1964* (no comma)

If the time period covers several months in one year: [Year]

*1964*

If the time period is several years in the same decade: [circa Decade]

*circa 1960s*

If the time period is broad and spans decades: [circa Decade-Decade]

*circa 1930-1960s*

If examination of a document provides that coverage is firmly fixed within/across specific years, record the years: [Year-Year]

*1969-1971*

If you are not sure about the year, but think the time period covered is one year: [circa Year]

*circa 1964*

If the time period covered is in one year, but particularly a specific month: [Year (primarily Month)]

*1964 (primarily August)*

If it is known that the document was produced in a certain year but it is not dated, use square brackets around the date in the Title and Coverage fields.

Finding aids have coverage from the earliest document to the latest. Record this:

*1921-1973*

## Time Period

The Time Period field is related to the Coverage Field. It is not visible in the public interface and is used primarily to build custom searches.

The MDL staff will complete the Time Period as necessary for materials.

## Subject

Record up to eight subject headings in alphabetical order.

Subject headings and Name Authority Records in the thesaurus are taken from the Library of Congress Subject Headings and National Authority File (NAF).

Subject headings should be followed with a period, unless the term ends with a dash (ex: Evers, Charles, 1922- ). Separate multiple entries with a semicolon.

If a large group of people are shown in a photograph, prefer Description for their names. Concentrate subject headings on what is visible in the photograph or on the purpose of the scene of the photograph. Note capitalization and presence or lack of hyphens.

Subject Headings for institutions should be consistent with the name as it is in the document.

*Alcorn Agricultural and Mechanical College.*

(Some documents in CRMDA refer to Alcorn Agricultural and Mechanical College, which is now Alcorn State University. Use the heading for Alcorn Agricultural and Mechanical College, and note in the Description that Alcorn Agricultural and Mechanical College is now Alcorn State University.)

## Mississippi county

The Mississippi County field indicates the county in Mississippi that the item is about.

Use this field only if the content of the item is about Mississippi. **If the item is not about Mississippi, leave blank.**

The county should be taken from the Library of Congress Subject Headings and National Authority File (NAF).

*Lamar County (Miss.)*

*Hinds County (Miss.)*

Separate multiple entries with a semicolon. Remove the semicolon that follows the last entry.

## Geographic location

The Geographic Location field indicates the location that the item is about, other than the Mississippi county. It can be used to enter a city, region, state, county, or county for a state other than Mississippi.

If only the Mississippi county is known, use the Mississippi County field. If the geographic location is not known, leave the field blank. An item can have both the Mississippi county and a geographic location, if the information is known.

The geographic location should be taken from the Library of Congress Subject Headings and National Authority File (NAF).

*Hattiesburg (Miss.)*

*Atlanta (Ga.)*

*Mobile County (Ala.)*

*Georgia*

## *Brazil*

Separate multiple entries with a semicolon. Remove the semicolon that follows the last entry.

## **Resource type**

The Resource Type field indicates the format of the original item. Use more than one term if needed, listing them in alphabetical order.

Image refers to photographs or illustrations, not the digital image of a text document. Use both Text and Image for items that contain text and photograph(s).

Separate multiple entries with a semicolon.

*Image*  
*Interactive Resource* [web pages]  
*Moving Image*  
*Physical Object*  
*Sound*  
*Text*

## **Format**

Format provides information about the format, dimensions, and length of the document. Fill in [x] based on the height and width of the item, and if applicable, the number of pages of the original item in its physical form.

Documents should include height, width, and number of pages.

*Digital reproduction of a [x]" x [x]" [x]-page document.*  
*Digital reproduction of an 8" x 10" 6-page document.*

Photographs should include height and width, and should be designated as "black-and-white" or "color."

*Digital reproduction of a 5" x 7" black and white photograph.*  
*Digital reproduction of a 5" x 7" color photograph.*

For illustrations and other materials, specify the format of the original.

*Digital reproduction of a 5" x 7" black and white pencil sketch.*  
*Digital reproduction of a 5" x 7" watercolor.*

If the image is a part of a book or manuscript, document accordingly.

*Digital reproduction of a 5" x 7" book cover.*  
*Digital reproduction of a 5" x 7" color image from a magazine.*

For finding aids or other documents in HTML that do not have a pagination extent, do not record file size.

*Digital reproduction of a collection guide.*

## **Media Format**

Media Format provides indicates the format of the original item. It is more specific than the Resource Type field. This field is not visible in the public web interface and is used to build searches in CONTENTdm

Image refers to photographs or illustrations, not the digital image of a text document. Use both Text and Image for items that contain text and photograph(s).

The resource type field is a controlled vocabulary field in CONTENTdm. Separate multiple entries with a semicolon.

*Audio*  
*Cartoon*  
*Document*  
*Film*  
*Illustration*  
*Image*  
*Map*  
*Newspaper*  
*Object*  
*Oral history*  
*Page from publication*  
*Publication*  
*Scrapbook*  
*Text*  
*Video*  
*Website*

## **Language**

Enter the Language for all documents, including those in English. Leave this field blank for documents for which Language does not apply, such as a photograph. For documents in a language other than English, enter the language.

## **Publisher**

The Publisher field indicates the party responsible for publication of the physical item (if applicable) and the party responsible for the electronic publication of each item.

The publisher of the physical item applies primarily to books and other published items. It should be listed first and followed by a period.

*Houghton Mifflin.*

Every item will have a publisher of the electronic version. The home repository is listed first, followed by the MDL. Both terms should have the (electronic version) designation.

*Delta State University Archives and Museum. (electronic version)*

*Mississippi Digital Library. (electronic version)*

Use the home repository name without the (electronic version) designation for finding aids and other materials published by the repository.

*Delta State University Archives and Museum.*

Separate multiple entries with a semicolon.

## Contributors

The information in this field gives credit to other parties that contributed to the publication of the item. This includes funding agencies that assisted with digitization. Separate multiple entries with a semicolon.

## Notes

The Notes field is visible in the public web interface, so only include notes that are suitable for public viewing. There is also a hidden notes field for technical or administrative notes that are hidden from the public.

The Notes field is also used to link to the finding aid for the collection to which the item belongs.

*A finding aid for this collection is available online at:*

*<http://www.lib.usm.edu/legacy/archives/m002.htm>*

Separate multiple entries with a semicolon.

## Rights

This field provides copyright information. Each institution is responsible for determining the copyright status of their materials. Statements should come from the rights statement recommendations at [rightsstatement.org](http://rightsstatement.org)

([http://rightsstatements.org/files/160208recommendations\\_for\\_standardized\\_international\\_rights\\_statements\\_v1.1.pdf](http://rightsstatements.org/files/160208recommendations_for_standardized_international_rights_statements_v1.1.pdf))

The two most commonly used rights statements are:

- No Known Copyright
- Copyright Not Evaluated

## Contributing institution

This field identifies the repository where the item is owned and housed. There is a period at the end of the statement.

*Item housed at Camp Van Dorn World War II Museum.*  
*Item housed at Blue Mountain College.*

## Collection

This field identifies the collection of which the item is a part. In the example below, xxx equals the manuscript number of the collection and yyy is the Collection Title. Use the Collection Title as it appears on the main page of the finding aid. There is a period at the end of this statement, and no comma between the collection number and the title.

*xxx yyy.*  
*M320 Zeman (Zoya) Freedom Summer Collection.*

## Source

The Source field gives the physical location of the item within the collection of which it is a part.

*Box 5, Folder 7*

If a photo identification number is assigned to photographs in the collection, include the number in the Source information.

*Box 1, Folder 3 M351-25a*

For books and other cataloged items, copy the call number from the catalog.

*PS3613.C85 O93 2004*

## Digital repository

This field identifies the digital repository to which the item belongs. There is a period at the end of the statement. The digital repository for all items in the MDL is:

*Mississippi Digital Library.*

## **Digital collection**

This field identifies the digital collection in CONTENTdm to which an item belongs. All items should include the Digital Collection. The digital collection is the name of the institution. There is a period at the end of the statement.

*Jackson State University.  
First Regional Library.*

## **File size**

This field identifies the file size of the item. Do not complete this field because the file size is automatically generated when the item is uploaded.

## **File extension**

The File Extension indicates the file type of the item (such as JPG or PDF). Do not complete this field because it is automatically generated when the item is uploaded.

## **Width**

The width of the item (in pixels) is automatically generated when the item is uploaded.

## **Height**

The height of the item (in pixels) is automatically generated when the item is uploaded.

## **Color space**

The Color Space field indicates the color profile of the item, such as RGB or Grayscale. The Color Space is automatically generated when the item is uploaded.

## **Date digital**

The Date Digital field indicates the date that the item was digitized. This field is formatted as a date type field, and has the same formatting requirements as the Date Searchable field. This field is not visible in the public web interface.



## Capture method

The Capture Method field indicates the method of digitization. If known, the model of scanner or camera used for digitization should be selected from the controlled vocabulary. This field is not visible in the public web interface.

## Master image

The Master Image field indicates the file extension and resolution of the master image. This field should be used only if the information about the master image is known. This field is a controlled vocabulary. This field is not visible in the public web interface.

*600 dpi TIFF*

## Record created by

The Record Created By field indicates which user uploaded the item. This field is automatically generated when the item is uploaded. This field is not visible in the public web interface.

## Hidden notes

The Hidden Notes field is a searchable field that is not visible in the public web interface, and it includes any notes not intended for public view. For example, the term *Needs cataloging* is used in this field at USM to indicate which items need to be reviewed by Bibliographic Services. This field has also been used to indicate items that were scanned at USM, but belong to another institution. The Hidden Notes field is searchable.

## Custom searches

The Custom Searches field is used strictly for building custom searches in CONTENTdm. The field is not visible from the public web interface.

## IP resolution

The IP Resolution field (intellectual property resolution) is used to manage permissions and copyright. The field has a controlled vocabulary and is not visible from the public

web interface. Based on the contents of this field, the permissions may be set to restrict the item from public view.

It is up to the institution submitting items to the MDL to determine copyright and obtain any necessary permissions. Please notify the MDL staff at USM of any issues regarding copyright.

Do not complete this field. The MDL staff at USM will complete the IP Resolution field.

## Transcript

The Transcript field is used to upload full-text transcripts of select documents.

Consult with the MDL staff at USM if you have transcripts to add to your images.

## File Name

The file name in the spreadsheet should match the corresponding item **exactly**. When entering file names, be sure to include the extension, even if your operating system hides the extension type (the extension will usually be jpg or pdf)

Filenames for items in the McCain Library digital collections are the same as the Identifier to help prevent duplication in naming files

*mus.m246.001p.jpg*

If you already have a file naming system, be sure to avoid duplication in the Identifier. It may help to add the identifier to the beginning of the filename, but it is not required.

Example from the Paxton Papers at Delta State

*mcd.m62.125 Address on Dixie Day.jpg*

- The original filename was *Address on Dixie Day.jpg* and they added the Identifier *mcd.m62.125* to the beginning

Revised: 4 March 2016 by Nicole Lawrence, Mississippi Digital Library Coordinator, University of Southern Mississippi Libraries

## Metadata Quick Reference

<b>FIELD NAME</b>	<b>COMPLETED BY</b>
1. Object name	MDL Staff
2. Identifier	Your institution
3. Alternate ID	Your institution
4. Title	Your institution
5. Alternate title	Your institution
6. Description	Your institution
7. Creator	Your institution
8. Searchable date	Your institution
9. Date	Your institution
10. Coverage (time period)	Your institution
11. Time period	MDL Staff
12. Subject	Your institution
13. Mississippi county	Your institution
14. Geographic location	Your institution
15. Resource type	Your institution
16. Format	Your institution
17. Media format	Your institution
18. Language	Your institution
19. Publisher	Your institution
20. Contributors	Your institution
21. Notes	Your institution
22. Rights	Your institution
23. Contributing institution	Your institution
24. Collection	Your institution
25. Source	Your institution
26. Digital repository	Your institution
27. Digital collection	Your institution
28. File size	Automatically generated
29. File extension	Automatically generated
30. Width	Automatically generated
31. Height	Automatically generated
32. Color space	Automatically generated
33. Date digital	Your institution
34. Capture method	Your institution
35. Master image	Your institution
36. Record created by	Automatically generated
37. Hidden notes	Your institution
38. Custom searches	MDL Staff
39. IP resolution	MDL Staff
40. Transcript	MDL Staff
41. File name	Your institution