



Metadata Best Practices

*For use with online forms only

Mississippi Digital Library

Metadata Best Practices

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This document provides instructions for creating and adding metadata for manuscripts, documents, photographs, and related materials through the online forms located at metadata.msdl.org. If you are using the metadata template please use the best practices for the metadata template which can be found at www.msdl.org/cdm4/resources.

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
- Civil Rights in Mississippi Digital Archive: <http://digilib.usm.edu/crmda.php>
- Dublin Core Metadata Initiative: www.dublincore.org
- Library of Congress Authorities: <http://authorities.loc.gov/>
- Anglo-American Cataloging Rules: <http://desktop.loc.gov/>

List of Metadata Form Fields

Items with a * are required fields.

1. Identifier*
2. Title*
3. Alternate title
4. Description*
5. Creator
6. Is the item dated?
 - a. Date
 - b. Coverage (Time Period)
7. Do you use Library of Congress Subject Headings?
 - a. Subject
8. Is there a Mississippi county or geographic location associated with the item?
 - a. Mississippi county
 - b. Geographic location
9. Resource type*
10. Format
11. Is there text on the item?
 - a. Language
12. Media format
13. Format*
14. Capture method
15. Date digital
16. Master image
17. Publisher
18. Contributing institution
19. Collection
20. Are there other contributors?
 - a. Contributors
21. Source
22. Rights
23. Would you like to add additional notes?
 - a. Notes
 - b. Hidden notes
24. Is this a multi-page item (compound object)? *
 - a. File name
 - b. Upload File
 - c. Upload Files

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.

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, enter Unknown. When the last name of the author/creator is unknown, enter the author's first name and [last name unknown].

*Unknown.
Thomas [last name unknown]*

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.

Is the item dated?

If "No" is selected no additional information is necessary; skip to "Do you use Library of Congress Subject Headings?". If "Yes" is selected, the following two fields will appear.

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 is visible in the public interface. The date must be spelled out in the Date field as DD Month YYYY.

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, record undated.

Undated

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.

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

Do you use Library of Congress Subject Headings?

If “No” is selected no additional information is necessary; skip to “Is there a Mississippi county or geographic location associated with the item?”. If “Yes” is selected, the following field will appear.

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.)

Is there a Mississippi county or geographic location associated with the item?

If “No” is selected no additional information is necessary; press the “Next” button at the bottom of the page. If “Yes” is selected, the following two fields will appear.

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. Check more than one term if needed.

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 following are the options for this field.

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

Is there text on the item?

If “No” is selected no additional information is necessary; skip to “Is there a Mississippi county or geographic location associated with the item?”. If “Yes” is selected, the following field will appear.

Language

Enter the Language for the item; by default the language is set to English (shown as the abbreviation: en). If the language of the item is English no additional entries are needed. For items in a language other than English, enter the language spelled out completely. Separate multiple entries with a semicolon.

French
Latin

Media Format

Media Format 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. Check as many options as necessary.

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).

Audio
Cartoon
Document
Film
Illustration
Image
Map
Newspaper
Object
Oral history

Page from publication
Publication
Scrapbook
Text
Video
Website

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.

Capture method

The Capture Method field indicates the method of digitization and will be automatically generated by default; change as necessary. This field is not visible in the public web interface.

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 field. 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 not visible in the public web interface.

600 dpi TIFF

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. This field will be automatically generated by default; change as necessary. Separate multiple entries with a semicolon.

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.

Contributing Institution

This field identifies the repository where the item is owned and housed. It will be automatically generated by default; change as necessary. There is a period at the end of the statement.

Item housed at The University of Southern Mississippi.

Item housed at Delta State University Archives.

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.*

Are there other contributors?

If “No” is selected no additional information is necessary; skip to “Source”. If “Yes” is selected, the following field will appear.

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.

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

Rights

This field provides copyright information and will be automatically generated by default; change as necessary. A standard statement follows:

Copyright protected. Use of materials from this collection beyond the exceptions provided for in the Fair Use and Educational Use clauses of the U.S. Copyright Law may violate federal law. Permission to publish or reproduce is required.

Each repository should determine its own rights management statement to be included in each metadata record.

Would you like to add additional notes?

If “No” is selected no additional information is necessary; skip to “Is this a multi-page item (compound object)?”. If “Yes” is selected, the following two fields will appear.

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 has been used to identify items belonging to one institution that are housed at another institution.

Item housed at the Mississippi Department of Archives and History.

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.

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.

Is this a multi-page item (compound object)?*

If “No” is selected, the fields “File Name” and “Upload File” will appear. If “Yes” is selected, the field “Upload Files” will appear.

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

Upload File

Press the “Upload File” button. Browse to the file you wish to upload and select “Open”.

***The following is only used with multi-page items**

Upload Files

Press the “Upload File” button. Browse to the file you wish to upload and select “Open”. Repeat as necessary.

Revised and updated by Laura Capell, Digital Archivist, and Linda Ginn, Catalog Librarian University of Southern Mississippi Libraries. Latest Revision: 16 November 2009

Revised: 22 August 2012 by Amanda McRaney, Manager of Digitization Laboratory, University of Southern Mississippi Libraries

Revised: 26 June 2013 by Nicole Lawrence, Mississippi Digital Library Specialist, Mississippi Digital Library

Revised: 5 February 2014 by Nicole Lawrence, Mississippi Digital Library Coordinator, Mississippi Digital Library