Metadata and Access Guidelines for Digital Collections for the State University Libraries of Florida

Metadata and Access Guidelines for Digital Collections for the State University Libraries of Florida
Version 1.0

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Purpose

Revised: May 21, 2010

A.1. Purpose

The purpose of this document is to guide the description of digital resources using MARC21, Dublin Core, and other descriptive metadata formats as appropriate and to facilitate access through Aleph and Mango for patrons at SUS institutions as well as the general public.

Background

Revised: May 21, 2010
A.2. Background

This document revises and updates the Cataloging and Access Guidelines for Electronic Resources, Part 1: SUS Digitization Projects created July 2003, informally known as the "CAGER Guidelines". With new content management and library management systems, the CAGER Guidelines had become outdated and the request for new standards was pressing.

A joint working group with members from the Metadata Subcommittee of the Technical Services Planning Committee and the Digital Initiatives Subcommittee of the Technology Advisory Group was established to address the issue from the perspective of both cataloging and digital collections. The resulting draft Guidelines were reviewed, revised and approved by the parent committees in [date].

Ultimately, this document will address description of digital resources by suggesting Guidelines for a variety of metadata formats. The first release of the Guidelines address description using Dublin Core. However it does discuss some issues related to MARC records, such as "Do I use MARC or Dublin Core" and "Where should I put my local MARC record".
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Review and Maintenance

Revised: May 21, 2010

A.3. Review and Maintenance

The goal of the working group was to create a document that could provide guidelines for the creation of metadata while ensuring flexibility among various systems and technologies. The document will be reviewed annually by both the Metadata Subcommittee and the Digital Initiatives Subcommittee. Updates and changes will be addressed as needed.

The document may be revised outside of annual review when needed. Requests for additions, changes, clarifications etc. should be sent to the Metadata Subcommittee.
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Acknowledgements
Revised: January 28, 2011

A.4. Acknowledgments

This document is modeled after the Collaborative Digitization Program's Dublin Core Metadata Best Practices Version 2.1.1
dublin-core-bp.pdf and North Carolina's Exploring Cultural Heritage Online Dublin Core Implementation

Guidelines http://www.ncecho.org/dig/ncdc2007.shtml.

Participation by a variety of individuals from State University Libraries was crucial to the development of this document. At various points in times, members of the working group included:
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Versions

A.5. Versions

These Guidelines will be revised from time to time. Any minor revision will result in an increment to the minor version number, e.g. from 1.0 to 1.1. A major revision will result in an increment to the major version number, e.g. from 1.1 to 2.0.

The Guidelines may exist in many formats, including wiki, print, and PDF. The wiki version should always be considered the authoritative version of the Guidelines.
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What is Metadata?

Last Revised: June 4, 2010

B.1. What is Metadata?

Metadata can be thought of as data about other data. A metadata record consists of a set of attributes, or elements, necessary to describe the resource in question. For example, a discovery system common in libraries – the library catalog – contains a set of metadata records with elements that describe books and other library items: author, title, date of creation or publication, subject coverage, and a call number specifying location of the item on the shelf.

The linkage between a metadata record and the resource it describes may take one of two forms:

1. elements may be contained in a record separate from the item, as in the case of the library's catalog record; or

2. the metadata may be embedded in the resource itself.

Examples of embedded metadata that is carried along with the resource itself include the Cataloging In Publication (CIP) data printed on the verso of a book's title page, and the TEI header in an electronic text. Many metadata standards in use today, including the Dublin Core standard, do not prescribe either type of linkage, leaving the decision to each particular implementation.

Although the concept of metadata predates the Internet and the Web, worldwide interest in metadata standards and practices has exploded with the increase in electronic publishing and digital libraries, and the concomitant "information overload" resulting from vast quantities of undifferentiated digital data available online. Anyone who has attempted to find information online using one of today's popular Web search services has likely experienced the frustration of retrieving hundreds, if not thousands, of "hits" with limited ability to refine or make a more precise search. The wide scale adoption of descriptive standards and practices for electronic resources will improve retrieval of relevant resources in any venue where information retrieval is critical.

Library staff often distinguish between MARC and metadata, MARC being the traditional carrier of library description according to cataloging rules, and metadata being non-MARC descriptive standards such as Dublin Core, MODS or the VRA Core. This distinction can be useful in some circumstances, as long as you realize that MARC cataloging is metadata too. Also note that MODS occupies a place somewhere between MARC and metadata (if you're using the term in the narrow sense), being MARC semantics represented in a non-MARC syntax.

(The explanation above is partially taken, with revisions, from http://dublincore.org/documents/usageguide/#whatismetadata by Diane Hillmann.)
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What is Dublin Core?

Last Revised: January 28, 2011

B.2. What is Dublin Core?

Dublin Core is a metadata standard that is supposed to be simpler than traditional library cataloging but

expressive enough to allow resources to be discovered and identified. The original Dublin Core specification, issued in 1995, contained thirteen elements, later expanded to fifteen. Early use revealed the need for additional elements and some element refinements (for example, to identify particular types of dates). For a while, the standard maintained a distinction between the (almost) original 15 elements ("simple Dublin Core") and an expanded set of approved elements ("qualified Dublin Core"). Currently, there are 55 approved elements (called "properties"), all considered to be created equal. However, the old

distinction between the "legacy" Dublin Core and the expanded set of terms is still maintained in some schema namespaces. Ex Libris's DigiTool, for example, uses the namespace "dc" for the legacy terms and "dcterms" for the additional terms.

Dublin Core was designed to be used for network-accessible resources. Nothing prevents its use for non-digital resources, but it is rarely used that way. It was also designed to be simple enough for a non-specialist to use, and flexible enough to describe any sort of document-like object. As it turns out, its very vagueness has made it difficult to use consistently. Dublin Core works best when used with a fairly prescriptive set of guidelines, such as these.

The Dublin Core is maintained by the Dublin Core Metadata Initiative (dublincore.org), which holds annual conferences on Dublin Core and metadata applications. The officially maintained Dublin Core vocabulary is at http://dublincore.org/documents/dcmi-terms/.

Other guidelines examined in the preparation of these Guidelines include:
Collaborative Digitization Program Dublin Core Metadata Best Practices (attached below)
North Carolina Dublin Core Guidelines http://www.ncecho.org/dig/ncdc2007.shtml

dublin-core-bp.pdf
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Mapping and crosswalks

B.3. Mapping and crosswalks

If two metadata schemes describe the same type of material at the same level of granularity, it is likely that metadata elements defined in one scheme can be mapped to elements defined in the other. For example, the Dublin Core element "Title" maps roughly to the MARC21 field 245, subfields a and b. A mapping back and forth between two schemes is sometimes called a "crosswalk".

The Library of Congress maintains mappings between MARC21 and other formats (MODS, Dublin Core, Digital Geospatial Metadata and Onix) on its MARC Documentation webpage (http://www.loc.gov/marc/marcdocz.html). A more extensive list of metadata mappings are maintained by the MIT Libraries at http://libraries.mit.edu/guides/subjects/metadata/mappings.html.

Harvesting

B.4. Harvesting

"Metadata harvesting" is a term used to refer to the act of copying metadata records from a source site into an aggregation of metadata records maintained at a target site. Many library systems and digital content management systems used by libraries support a harvesting protocol called the Open Archives Initiative Protocol for Metadata Harvesting (OAI-PMH).

OAI-PMH is a fairly simple protocol that allows the target system (the "service provider") to ask the source system (the "broker") for records and for the source system to provide them. One nice feature is that OAI-PMH supports brokering subsets of a database ("sets") so, for example, a broker could offer a service provider the option of selecting only English-language, Spanish-language, or Other-language records for harvest or any combination of these. Sets are arbitrarily defined by the broker and can be made on any basis (language, subject, material type, collection, etc.).

OAI-PMH requires that any system that claims to support the protocol must be able to export metadata records for harvesting in a simple Dublin Core XML format. However, it allows systems to agree to harvest records in other formats, as long as those formats are expressed in XML.

For more information about the OAI-PMH, see http://www.openarchives.org/pmh/.

Note: Ex Libris' DigiTool system uses the term "harvesting" to refer to the act of copying metadata records from the DigiTool repository into Resouce Discovery. This is a legitimate use of the term that does not involve the OAI-PMH.

Digital Collections Architecture

Revised: May 28, 2010

C.1. Digital Collections Architecture

This PowerPoint presentation explains the SUS architecture for digital collections and metadata. It shows how Aleph, Mango, and DigiTool fit together.
Digital Collections Architecture.ppt

Should my collection be PALMM or non-PALMM?

C.2. Should my collection be PALMM or non-PALMM?

PALMM (Publication of Archival, Library and Museum Materials) is the cooperative digital collection-building program of the SUS libraries. PALMM collections are collectively promoted, and in the past have received some central support from the CSUL. PALMM was conceived in order to create a whole that is greater than the sum of its parts, reinforce the spirit of cooperation among the libraries, leverage synergies among multiple collections, and present a unified SUL presence to the outside world.

When a library or group of libraries establishes a new collection, they should decide if it will be a PALMM collection or not. No one factor distinguishes a PALMM collection, rather a group of features:

- the collection is of general (as opposed to institutional) interest
- it is open to contributions from other SULs; it may also be open to non-SUL partner organizations
- it will carry the PALMM banner for public display, and be listed on a Web page of all PALMM collections
- records describing items in the collection will go into Mango
- Mango records will be labeled with "PALMM (SUS Publication of Archival, Library and Museum Materials)" on the Search results screen, although they may attribute a single named library or group of libraries in the full bibliographic display.

Proposals for new PALMM collections should be submitted to the Digital Initiatives Subcommittee for discussion. This alerts the other libraries who may want to contribute to the collection, or influence the scope.

A PALMM collection can either be hosted on FCLA's DigiTool server or on a system run by a library. If the collection will be in DigiTool, FCLA will establish the collection code and set up the collection in DigiTool Test and Production. Items will appear in Mango automatically. If the collection will be hosted elsewhere, the contributing libraries are responsible for ensuring that records appear in Mango.

Non-PALMM collections can also be hosted either on FCLA's DigiTool server or on systems run by the library. If hosted on DigiTool, the library must purchase its own DigiTool Administrative Unit from Ex Libris for a one-time cost of about $6000 and an annual maintenance fee of about $1500. Other costs such as maintaining the DigiTool system, disk storage, backup services, COOP (a warm- or hot-site for continuation of operations in the event of a disaster), and (optionally) sending records to Mango are absorbed by FCLA and not charged back to the library.

Researchers benefit when materials are aggregated into larger collections of similar materials. Regardless of whether collections are PALMM or non-PALMM, it should be possible to harvest metadata from the collection and aggregate it with other metadata in larger portals. Therefore it is highly recommended that all platforms used for hosting digital collections be capable of supporting OAI-PMH (the Open Archives Initiative Protocol for Metadata Harvesting), which allows them to broker or expose their metadata records for harvesting into Florida on Florida (a statewide aggregation of records for digital materials

about Florida) and other OAI-based portals. See [Harvesting](#) for more information about metadata harvesting.

Do I use MARC or Dublin Core? General Guidelines

Revised May 28, 2010

C.3. Do I use MARC or Dublin Core?

(Note: In version 1 of these Guidelines we consider MARC and Dublin Core only. We will consider other schemas in this section when they are added to the document.)

There are no hard-and-fast rules for when to use Dublin Core and when to use MARC. The choice will often depend on library policy, available resources, and/or the nature of materials in the collection.

I. When it might be advisable to use MARC

I.a. The digital item is a version of a non-digital source that already has a MARC record in your Aleph library.

I.b. The digital item is something you want to enter into OCLC for cataloging credit.

I.c. The digital item was created as part of a funded project, where the funding provided for MARC cataloging, or requires records to be contributed to OCLC.

I.d. The digital item is something that you would normally catalog in MARC if it were non-digital; for example, a book.

I.e. It is important that headings be subjected to name and/or subject authority. (You can use authorized headings in Dublin Core but there are no tools to facilitate this.)

I.f. You want to include highly encoded information for some special use. For example, it would be much better to enter coordinates of an actionable bounding box or g-ring in a subfielded MARC 034 than in Dublin Core Spatial Extent.

II. When it might be advisable to use Dublin Core

II.a. The digital item is part of a large collection of items with no pre-existing catalog records.

II.b. The digital item is something you would not normally catalog in MARC if it were non-digital; for example, a slide, song or video clip.

II.c. Creating metadata for the digital item is the responsibility of a unit that does not normally do MARC cataloging.

II.d. The materials in the collection do not fit any of the common MARC bibliographic formats; e.g. botanical type specimens.

II.e. You want to create and maintain the metadata entirely in DigiTool, and/or you want the simpler workflow that creating Dublin Core in DigiTool offers.
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Where should I put my local MARC record?

Revised: May 28, 2010

C.4. Where should I put my local MARC record?

MARC records for digital content can live in a library's own Aleph library, or in the Aleph library for common content (DLU01). Libraries are encouraged to contribute MARC records for locally owned digital content to DLU01.

DLU01

According to recommendations of the 2006 Metadata Summit meeting, MARC records for all locally owned (as opposed to licensed) digital content should live in DLU01, regardless of where the content itself is hosted. That means that DLU01 is the recommended place for master MARC records for PALMM and non-PALMM content in FCLA's DigiTool, and also for MARC records for content in local library systems. The reasons for this recommendation were:

a) DLU01, being an Aleph library, has better support for cataloging and authority control than DigiTool. Therefore MARC records for DigiTool content should be created in DLU01 and imported into DigiTool.

b) If all libraries' records for digital content are in DLU01, it becomes a collective resource for determining what has been digitized, and could be used to flag intent to digitize as well, like the old NOTIS QF file.

c) Records in DLU01 are automatically included in all libraries' Mango catalogs in addition to the union Mango catalog, because local digital content is an SUS-wide resource.

For instructions on exporting from OCLC Connexion to the DLU01 database click here. Aleph ID and password required.

Library staff are responsible for creating PURLs for their digital content and recording them in the 856 $u of the DLU01 record.

DigiTool requires metadata to be stored in DigiTool in order to appear in Resource Discovery. Libraries that store their master MARC records in DLU01 should use DigiTool's function to import external records to bring a copy of the DLU01 record into DigiTool. The DLU01 record should always be created first and imported into DigiTool, because that way the DigiTool record will contain the Aleph system number.

Other Aleph

Libraries may, for policy or other reasons, prefer to use their own Aleph libraries. This is, for example, often the case for MARC records describing ETDs. This decision should be made carefully, because a records in a library's own Aleph will NOT be included in other libraries' Mango catalogs (although they will be included in the union Mango catalog, of course).

Non Aleph

Libraries using Digital Library systems may want to store MARC records in these systems and not in any Aleph library. Libraries with local DL systems are encouraged to put MARC records for their items in DLU01. However, at their option they can create/maintain MARC, MODS and/or other bibliographic format records in their own DL systems.

These records will not appear in any Mango catalog without special handling. Libraries can make arrangements with FCLA's Library Services for a special feed into Mango.

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Element Descriptions

Revised: January 29,2011

D.1. Element Descriptions

Each element of Dublin Core is outlined in a separate element description. This section of the guide will help you understand how the descriptions for each element are arranged.

Name: The element's name, with a hyperlink to the official DCMI definition and comments.

Use: Whether the element is Mandatory, Mandatory if Applicable, or Optional as defined here.

Repeatable: Whether the element can be repeated.

Controlled Vocabulary: Recommended sources of specific vocabularies for element values, if any. If the

vocabularies are available online, a link is provided.

The next three items refer to how a discovery tool or digital content management system should treat the element. The FCLA instance of DigiTool follows these rules (or will be modified to follow these rules). Managers of other systems are encouraged to follow these rules in configuration.

Indexed by system: Whether the element should be indexed in the system.

Display to Users: Whether the element should display to end-users of the system.

Semantic Equivalents: Rough equivalencies between this element and comparable fields or subfields of the MARC record. They are intended to give MARC catalogers a rough understanding of the Dublin Core element, and Dublin Core catalogers a rough idea of where similar elements are found in the MARC record. *This information should NOT be used as a formal mapping between formats. For more information about mapping, see [*"Mapping and Crosswalks"*](#) .*

Notes: Any notes that are specific to Florida projects and needs.

Input Guidelines: Guidelines for creating, formatting, and inputting the element, including external links to applicable rule sets, definitions, and guidelines. (If a guideline is preceded by "Dublin Core Comment" it means that the item has been taken directly from the DCMI explanation of the element.) Please note that the guidelines in this document are best practices based on discussion, experience and similar local and regional standards, but they may not cover every possible situation or project type. Project-specific guidelines should generally be made by drawing on, but not necessarily copying, the guidelines in this document.

Examples: The examples are meant to illustrate important aspects of the guidelines. Again, they cannot cover every possible situation, but can help provide guidance. We have made every effort to make sure the examples are accurate, but if an example here contradicts data given in a recommended source or standard, *follow the standard, not the example.*

Special Note About Capitalization and Punctuation in Examples & Guidelines: The specifics of punctuation and capitalization given in these element descriptions are based largely on existing cataloging rules. They are intended to be used when creating metadata by hand. For projects using *harvested* data, variations in capitalization and punctuation may occur. Unless those variations would affect access, generally do not attempt to force the data to conform to these standards.

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Elements and Refinements

Revised: January 28, 2011

D.2. Elements and Refinements

The difference between Dublin Core elements and element refinements can most easily be explained historically. When the original Dublin Core element set was announced in 1995, it contained only 13 very general elements, like Title, Subject and Date. As Dublin Core was used in various contexts, it became clear that some projects needed more granularity than it was possible to express with the original elements. For example, the difference between the date of submission and the date of acceptance was important to some sites publishing journal articles. As a consequence, a set of "qualifiers" was defined and described with a "dot-qualifier" notation:

 date
date.submitted
date.accepted
date.issued

Over time this was found to be incompatible with the demands of XML/RDF, and the old qualifiers became a special type of element called "refinements", designed to stand alone as terms even though their meeting refined the meaning of a more general element:

date
dateSubmitted
dateAccepted
issued

In general, the terms "qualifier" and "refinement" mean the same thing, but we have tried to stick to the newer term "refinement" in these Guidelines.

In these Guidelines, we have included most (but not all) of the refinements defined by the DCMI. For guidance on whether to use a generic element or one of its refinements, see the instructions for that specific element.

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Mandatory and Optional Elements

Revised: January 28, 2011

D.3. Mandatory and Optional Elements

Mandatory: Required for all records in all projects. If possible, should be tied to record validation routines such that records lacking a mandatory element cannot be uploaded or updated.

Mandatory fields:
Title

Mandatory if Applicable: Required for all records for which the data can meaningfully be coded. (For example, the ending date of a completed set.) Where feasible, prompts may be used to encourage addition of this data, but uploading and updating should usually not be prevented.

Mandatory if Applicable fields:
Coverage
Creator
Date
Publisher
Subject
Spatial Coverage
Temporal Coverage
Type

Optional: Optional fields may not be applicable to a given item or format of item, or may be unknown to the coder. Within a specific project, fields normally considered Optional may be designated as Mandatory if Applicable by the project manager. Validation routines for Optional fields should be limited to preventing loading of invalid coding; uploading and updating records should not be contingent on Optional fields.

Optional fields:
Abstract
Alternative (title)
Contributor
Description
Format
Identifier
Language
Location
Relation
Rights
Source
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Title

Revised: December 13, 2010

E.1. Title

Name: [Title](#)

Use: Mandatory
Repeatable: No
Controlled Vocabulary: None
Indexed by system: Recommended
Display to users: Recommended
Label for display to users: Title
Semantic equivalents: MARC 245
Refinements: Alternative Title

Usage Guidelines

Dublin Core comment: Typically, a Title will be a name by which the resource is formally known.

Use the http://www.aacr2.org/us/products_aacr2.html, Describing Archives: A Content Standard (DACS) http://www.archivists.org/governance/standards/dacs.asp, or Cataloging Cultural Objects (CCO) http://www.vrafoundation.org/ccoweb/index.htm.

3. Prefer non-use of explanatory or qualifying symbols; for example, do not use square brackets to indicate a cataloger-supplied title.

4. Make the title as descriptive as possible, avoiding simple generic titles such as "Papers" or "Annual report."
Example:
Snyder School for Boys on Captiva: Annual Report 1938
Study of farming and related occupational opportunities in Goulds school area of Dade county, Florida

5. When constructing a title, avoid using initial articles. When transcribing a title, omit the initial article unless it is necessary to disambiguate the item. Examples:
Race car on the beach in Daytona
Sound and the Fury
The Advocate [to distinguish from the journal "Advocate"]

6. Capitalize only the first letter of the first word of the title and of proper names contained within the title.
Example:
Ponce de Leon land and Florida war record

7. In general, transcribe titles and subtitles from the source using the same punctuation that appears on the source. For example, a period should only be used at the end of the title if it appears as part of the title on the source.
Example:
Raggin' Rudi: a ragtime piano solo

8. If the main title consists of multiple titles, enter multiple titles in the order in which they appear on the resource or in order of their importance. Each entry should be clearly separated by a period and a space within the title element.

9. Multiple components within a cataloger-created title should be seperated by a period followed by a space.
Example:
Algaringo Street. Photographs of four buildings on a street, Coral Gables, Florida

10. Use a colon to further describe a title if needed. Use periods to seperate individual alternative pieces of a title.
Example:
Map of Florida: showing topography, hard rock and land pebble phosphate deposits, and areas of artesian flow
Atlantic Ocean at Neptune Beach, Florida: the world's finest beaches
Tequesta: the journal of the Historical Association of Southern Florida. Volume 1, Number 4
Panel discussion on Bach's life. November 11, 2010
The Miami herald. November 11, 2010. Volume 314, Issue 2

11. When creating your own title it is advisable not to begin a title with the format. That is, do "Andrew Mellon on the beach" not "Photograph of Andrew Mellon on the beach" or "Postcard of Andrew Mellon on the beach". The exception is oral history interviews, where the cataloging guidelines actually do say to begin titles with "Oral history interview with..." (Marion Matters, Oral History Cataloging Manual, Society of American Archivists: Chicago, 1995.)

Additional Examples:
Map:
Map of the West Coast of Africa from Sierra Leone to Cape Palmas including the Colony of Liberia
Map of Florida: showing topography, hard rock and land pebble phosphate deposits, and areas of artesian flow
Preliminary chart of Key West Harbor and approaches

Serial (newspaper or journal):
Tequesta: the journal of the Historical Association of Southern Florida. Volume 1, Number 4
The Florida historical quarterly. Volume 55, Issue 1
The Miami herald. November 11, 2010. Volume 314, Issue 2

Photograph:
Algaringo Street: Coral Gables, Florida
Algaringo Street. Photographs of four buildings on a street, Coral Gables, Florida

Postcard:
Residences of Division Street, Key West

View N. W. from Key West Light Key West, Fla.
Atlantic Ocean at Neptune Beach, Florida: the world's finest beaches
Snyder School for Boys on Captiva

Sheet music:
Are you havin' any fun?
Raggin' Rudi: a ragtime piano solo

Audio file:
Bach: Violin Sonata No. 1 in Gm, BWV1001, i. Adagio
Ravel: Tzigane
Stuart Glazer: Art Music, Monet's Cathedral
Lecture by Dr. Zvi Aroni
Lecture by Dr. Zvi Aroni on women rights delivered to the Free Women Association
Lecture by Dr. Zvi Aroni on women rights delivered to the Free Women Association. December 4, 2009
Speech by Martin Luther King. November 20, 1954
Performance by the String Quartet
Panel discussion on Bach's life. November 11, 2010
With the wild things: flamingos

Oral history:
Oral history interview with Robert Watson, 2006 November 29.

Video file:
Through a glass darkly, solo 1: guilty
Identifying gifted children
Savanillas welcomes Ejido Nuevo

Ephemera:
Asplenium curtissii
Fertility vase
Slippers used by the Makawii tribe
Young matron's dress: Mfengu people
Beer pot with lid
Beaded headdress
Mbawoon ancestor mask

Monograph/Document:
Land use policy plan summary Southwest Florida Regional Planning Council
A study of farming and related occupational opportunities in Goulds school area of Dade county, Florida

Book:
Ponce de Leon land and Florida war record

Florida, the land of enchantment: including an account of its romantic history from the days of Ponce de Leon and the other early explorers and settlers, and the story of its native Indians; a survey of its climate, lakes and rivers and a description of its scenic wonders and abundant animal and bird life; and a comprehensive review of the Florida of to-day, as a state important for its industries, agriculture and educational advantages as well as the unsurpassed and justly celebrated winter resort of America, with unparalleled attractions for health and pleasure seekers, nature lovers, motorists and sportsmen Discovery of Florida and its discoverer Juan Ponce de Leon

Letters:
Warner correspondence. November 2, 1885
Letter to Earnest Bailey from Frank
Letter from Stan Coleman to his sister, Frances, describing life on radio patrol in Sanibel

Book chapter:
Tumor cell morphology: a chapter from Comparative oncology

Article:
Role of T cells in a murine model of Escherichia coli sepsis
Hybridization in the Ensatina Ring species: strong selection against hybrids at a hybrid zone in the ensatina ring species complex and its evolutionary implications

Finding Aid:
Wekiva River Basin Maps and Aerial Photographs Collection. 1965-1990
Bryant West Indies Audio Collection. circa 1940-1970
The Joseph and Mary Velezdy Papers. 1947-1999

Websites:
Amazon
CNN
Judaica Sound Archives
University of Central Florida Libraries' Special Collections and Archives
FAU Special Collections & Archives
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Alternative title

Revised: December 13, 2010

E.1a. Alternative Title
Name: Alternative
Use: Optional
Repeatable: Yes

Controlled Vocabulary: None
Indexed by system: Recommended
Display to users: Recommended
Label for display to users: Alternative Title
Semantic equivalents: 130, 210, 240, 242, 246, 730, 740

Usage Guidelines

DCMI definition: An alternative name for the resource.

Use Alternative Title for any form of the title used as a substitute, alternative, or supplemental title to the formal title of the resource. This includes caption title, former title, spine title, collection title, artist's title, object name, etc.

Do not use for subtitle, which should be entered in Title. However, if the subtitle can meaningfully stand alone and is a useful access point, repeat the subtitle as an Alternative Title.

Recommended practice is not to use alternative titles for cataloger supplied titles.

Input Guidelines:

1. For entering a value into this field, follow the same input guidelines as provided for Title.
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Creator

Revised: December 16, 2010

E.2. Creator
Name: Creator
Use: Mandatory if applicable
Repeatable: Yes
Controlled Vocabulary: Recommended - MARC Name Authority File http://authorities.loc.gov/
Indexed by system: Recommended
Display to users: Recommended
Label for display to users: Creator
Semantic equivalents: MARC 245c; MARC 100, 110 or 111

Usage Guidelines:

A Creator is an entity primarily responsible for the intellectual content of the resource. Creators may be persons, organizations, or services. If a digital surrogate is made of a non-digital work, the creator of the

original work (i.e. of the intellectual content) should be recorded, not the digitizing entity. However, the digitizing entity may be used as Creator in collection level records.

Do not use for secondary authors, editors, etc. Use Contributor instead.

Input Guidelines:

1. If the creators are listed on the resource, list them in the order in which they appear. If the resource does not have that information, take care to put the most important creator first. Use separate Creator elements for each Creator.

2. Determine the correct form of the name from an authority file when possible, such as the Library of Congress name authority records at http://authorities.loc.gov, OCLC, or locally-specified authority files.

3. If the name of a Creator is not found in the authority file(s) consulted, we recommend constructing the Creator element following established cataloging rules. Some examples of established rules include: Anglo-American Cataloging Rules (AACR2), Describing Archives: A content Standard (DACS), Cataloging Cultural Objects (CCO), and Resource Description and Access (RDA). For construction of personal name headings, this page from Yale University provides good general guidelines http://www.library.yale.edu/cataloging/music/pernames.htm

Source	Chapter or Section	Heading Type
AACR2	22	Personal and family names
AACR2	23-24	Corporate and geographic names
DACS	12	Personal and family names
DACS	13-14	Corporate names
CCO	3A.1	Personal and corporate names
CCO	3A.2	Geographic names

4. If a project decides not to follow established cataloging rules, names should still be entered consistently. In the absence of locally-specified rules, follow the guidelines below:

4.a. Enter personal names in inverted form in most cases: Last name, First name, Middle name or Middle initial (MI). If it is not obvious how to invert or structure the name, use the name form given in an authority list or enter it as it would be in the country of origin.

Example:

Lastname, Firstname

Lastname, Firstname [Function] *Also see #9 below*

Lastname, Firstname (Further Qualification/Description) *Also see #9 below*

Lastname, Firstname MI.

Lastname, Firstname Middlename

Lastname, Firstname MI., Dr.

Lastname, Firstname MI., Jr.

Lastname, Firstname, Date-Date

Lastname, Firstname, Date

4.b. Generally enter group or organization names in full, direct form. Avoid using initialisms or acronyms, unless the group is primarily publicly known by that form.

Examples:

University of Central Florida

Florida Atlantic University

Florida Center for Library Automation

4.c. If a group or organization name includes subordinate units, list the parts from the largest to smallest, separated by periods.

Examples:

United States. Army. Air Corps.

Florida Agricultural and Mechanical University. School of Pharmacy.

4.d. It is acceptable to use geographic names for creator when describing legal and administrative materials for a designation. Again, a standardized vocabulary should be used, and care taken to differentiate similar place names. Ensure that similar geographic names are differentiated by specifying the state or country they are located in within parentheses.

Example:

Panama City (Fla.)

Boca Tigris (China)

4.e. Using dates after the creator's name is not mandatory. This is a local institutional decision, so if your institution decides on using date, use the following guidelines to input the date :

- living person: 1957-
- birth and death years known: 1833-1896
- probable year of birth: 1563?-1626
- year of birth uncertain by several years: ca. 1300-1377
- approximate year of death: 1837-ca. 1896
- both years approximate: ca. 1508-ca. 1573
- year of death unknown: 1556-
- year of birth unknown: -1474

- years of birth and death unknown. Some years of activity known: fl. 1558-1567 (Do not use fl. dates within the twentieth century).
- years of birth and death unknown, years of activity unknown, century known: 16th cent. (Do not use for the twentieth century).
- years of birth and death unknown. Years of activity unknown, but active in two centuries: 16th/17th cent. (Do not use for the twentieth century).

5. The function of the creator may be included in brackets after the creator's name. To describe the name further, include the elaboration in parentheses after the name.
Example:
Adams, Ansel [Editor] *This is the function of the creator.*
Fleckstones (Musical Group) *The creator is further being described here.*

Additional examples for Creator:
1. Bocage, Alberto, 1929-
2. Bocage, Carlos Roma du, 1853-1918
3. Bocage de Bleìville, Michel-Joseph du, 1707-1756
4. Orlando, D. (Domenico)
6. Miller, Scott F.
7. Donald, Joseph Harold
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Contributor

Revised: December 16, 2010

E.3. Contributor
Name: Contributor
Use: Optional
Repeatable: Yes
Controlled Vocabulary: Recommended - MARC Name Authority File http://authorities.loc.gov/
Indexed by system: Recommended
Display to users: Recommended
Label for display to users: Contributor
Semantic equivalents: MARC: Person, e.g., Editor or Translator (700 |a); MARC: Organization (710/711 |a)

Usage Guidelines:

A contributor is an entity (person, organization, service, etc.) who has made contributions to the intellectual content of the resource. The relationship of a contributor to the resource is secondary to the person or organization in the Creator element. NC ECHO describes the contributor as "Person(s), family(ies), or organization(s) who made significant intellectual contributions to the resource, but whose

contribution is secondary to the person(s), family(ies) or organization(s) specified in the Creator element(s). Examples include editor, transcriber,translator, illustrator, etc."

Input Guidelines:

1. Use a separate Contributor element for each Contributor.

2. The function of the contributor may be included in brackets after the contributor's name. Capitalize the first letter of the function or role of the contributor. To describe the name further include that in parentheses after the name.
Example:
Ansel, Adams [Editor]
Fleckstones (Musical Group)

3. Enter names using the same guidelines as Creator.

Examples:
1. Crooks, James B. [Editor] —*[Editor] is an optional qualifier*
2. Lisska, Emily Retherford
3. Rae, John, 1882-1963 —-*example of illustrator; here the optional qualifier has not been used after the name.*
4. University of North Florida. Dept. of Chemistry. —*example of a thesis granting dept.*
5. Flecktones (Musical Group) —*example of a performing group*
6. Samuel P. Harn Museum of Art —*example of an art gallery*
7. Interstate Shellfish Sanitation Conference —*example of a conference*
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Description

Revised: December 13, 2010

E.4. Description
Name: Description
Use: Optional
Repeatable: Yes
Controlled Vocabulary: None
Indexed by system: Recommended
Display to users: Recommended
Label for display to users: Description
Semantic equivalents: MARC 5XX; 502 (Dissertation Note); MARC 505 (Table of Contents); MARC 520 (Abstract); MARC 590 (local note).

Refinements: [Table of Contents](#), [Abstract](#)

Usage Guidelines:

According to the Dublin Core definition, Description is to be used to describe the intellectual content of the resource. It continues, "Description may include but is not limited to: an abstract, table of contents, reference to a graphical representation of content or a free-text account of the content." In these Guidelines, we broaden that definition to allow Description to record information about other aspects of the resource not included in other elements (i.e., measurements of a depicted object, provenance, technique, distinguishing features, inscriptions, condition, history of the work etc.) that are considered to be significant for identification or understanding of the resource. It may also record local decisions related to the resource.

Although Description may contain a table of contents and/or an abstract, recommended usage is to use the refinement elements [Table of Contents](#) and [Abstract](#) for that data. Use Description for other descriptive information.

Dublin Core comments: Since the Description field is a potentially rich source of indexable terms, care should be taken to provide this element when possible. Best practice recommendation for this element is to use full sentences, as description is often used to present information to users to assist in their selection of appropriate resources from a set of search results. Descriptive information can be copied or automatically extracted from the item if there is no abstract or other structured description available. Although the source of the description may be a web page or other structured text with presentation tags, it is generally not good practice to include HTML or other structural tags within the Description element. Applications vary considerably in their ability to interpret such tags, and their inclusion may negatively affect the interoperability of the metadata.

The information in this field can be obtained from the original resource or the metadata creator can provide the information.

Digital Reproduction Specifications (example: This image was derived from an uncompressed Tiff scanned at 400DPI on a Kodak i200 series scanner) can be recorded in this element.

Input Guidelines:

1. Use this field to enter:

- o Descriptive text, remarks or comments about the resource.
- o Keyword terms not available in the Subject element. It is not mandatory for the keyword terms to adhere to any controlled vocabularies. Semicolons should be used to separate different keywords.

2. Repeat the field for different types of descriptions. For example, digital reproduction specifications should be in one instance while keywords are in another.

Examples:

1. Illustrated guide to airport markings and lighting signals, with particular reference to SMGCS (Surface Movement Guidance and Control System) for airports with low visibility conditions. — *From http://dublincore.org/documents/usageguide/elements.shtml*

2. Teachers Domain is a multimedia library for K-12 science educators, developed by WGBH through funding from the National Science Foundation as part of its National Science Digital Library initiative. The site offers a wealth of classroom-ready instructional resources, as well as online professional development materials and a set of tools which allows teachers to manage, annotate, and share the materials they use in classroom teaching. — *From http://dublincore.org/documents/usageguide/elements.shtml*
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3. A woman and a child in a horse-drawn buggy, identified on back as Mrs. Merrick and Charlotte, on Garden of the Gods Road, by White House Ranch. — *From http://www.bcr.org/cdp/best/dublin-core-bp.pdf*

4. Pete Chase interviewed by Sally Whalton in Key West, Florida. Topics covered in Pete Chase's interview: sailing to Miami; working as an engineer on a torpedo boat in the Navy; a new camping site built by the William Johnson family on Big Pine Key; Chase's family in the theatrical business; a Sunday trip at Sugarloaf; dating Hattie Johnson in Key West; Joe Whalton; a trip to Harbor Island; the 1910 hurricane; residence and living conditions in Key West; the railroad; sponge farming and sponge disease; cigar business; automobile business; walk to Miami, etc. — *From Key West Oral Histories in Digitool PALMM, http://digitool.fcla.edu)*
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Table of Contents

Date: December 13, 2010

E. 4a. Table of Contents
Name: Table of Contents
Use: Optional
Repeatable: No
Controlled Vocabulary: None
Indexed by system: Recommended
Display to users: Recommended
Label for display to users: Table of Contents
Semantic equivalents: MARC 505 0#$a (Formatted Contents Note)

Usage Guidelines:

DCMI definition: A list of subunits of the resource.

Input Guidelines:

1. Use a single instance of this field to enter a Table of Contents. The various headings should be separated by double dashes (–) or periods.

Examples:
1. Title page. Prefatory. Preparatory. Southwest Kansas and the Arkansas Valley. What the Government Reports Show. Government Land Office Statistics. The Arkansas Valley. The Old and the New. Pawnee Rock and its Inscriptions. In and About Kinsley. Wheat Raising. Wool Growing. Cattle Raising. In the Mountains. Cañon City and Vicinity. Gulch District. Hunting and Fishing. Prairie and Water Fowl. Trout and Grayling. Back Cover. — *From* *http://www.bcr.org/dps/cdp/best/dublin-core-bp.pdf*

2. 1. Carbon – pt. 2. Nitrogen – pt.3. Sulphur – p. 4. Metals. — *Shows slternative use of dashes, when the headings themselves contain periods*

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Abstract

revised: December 13, 2010

E.4b. Abstract
Name: Abstract
Use: Optional
Repeatable: No
Controlled Vocabulary: None
Indexed by system: Recommended
Display to users: Recommended
Label for display to users: Abstract
Semantic equivalents: MARC 520 if ind1=# or 3 (Summary, etc. note)

Usage Guidelines:

DCMI definition: A summary of the resource.

Use for abstracts provided in or with the resource. Prefer Description for cataloger-supplied summaries.

Input Guidelines:

1. If there are multiple abstracts from different sources, use a separate instance of Abstract for each.

Examples:
1. The article explores the impact of Student Uprising in October, 1973 on the development of Thai films. The event, the author argues, brought about a remarkable transition of Thai movies. That is, more movies

with political and social messages were produced, while those with fantasy genre were receiving less popularity among directors and audiences. — *From University of Washington Digital Collections, Thai Journal Index*
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Source

Revised: December 13, 2010

E.5. Source
Name: Source
Use: Optional
Repeatable: Yes
Controlled Vocabulary: None
Indexed by system: Recommended

Display to users: Recommended
Label for display to users: Source
Semantic equivalents: USMARC: 786 (Data Source Entry) or 776 (Additional Physical Form Entry)
See also: Relation, Link to Source.

Usage Guidelines:

Dublin Core Definition: Information about a resource from which the digital resource is derived.

Source is a specific kind of relationship, and as such it is more specific than the Relation element and equivalent to other refinements of Relation. Use Source in preference to Relation or other refinements of Relation when the resource being described is derived in whole or in part from another.

Whenever possible, include a unique standard identifier such as an ISBN, ISSN, or NTIS report number. If no standard identifier exists, use a local call number, control number, accession number, or barcode. Identify the institution associated with such locally derived numbers.

Do not use Source to enter a hotlink to the source material. Instead use the related Link to Source field.

Input guidelines:

1. Use separate Source elements to enter multiple sources. Usually there will only be one source from which the present digital resource has been derived.

2. Source may consist of a combination of descriptive aspects, such as free text combined with an ISBN to describe a book. Clarify the nature of the relationship between the two resources by using an initial phrase, such as "Excerpted from:", "From:", "Original version:", "Reproduction of:", etc.

Examples :

Original artifact: Red Raku Ware Tea Bowl, 3 3/8 x 5 1/2 inches, Metropolitan Museum of Art, New York, Accession No. 98-234

Reproduction of: Fisher, Vardis. God or Caesar?: the Writing of Fiction for Beginners (Caldwell, Idaho: Caxton Printers, 1953), 271 p.

Original format: First Road West: The Oregon Trail Through Wyoming (Cheyenne, Wyo. : Wyoming Recreation Commission, 1976) 1 videocassette (48 min.) : sd., col. ; 1/2 in. F597.F47 1976 (Univ. of Wyoming Libraries)

Excerpted from: 30 minute audio cassette recording of Galway Kinnell, reading from his poems, at Southern Connecticut State University, April 6, 1987

Additional Examples:

1. RC607.A26W574 1996 — *where "RC607.A26W574 1996" is the call number of the print version of the resource, from which the present version was scanned*

2. Image from page 54 of the 1922 edition of Romeo and Juliet.

3. Original letter: Letter from R.C. Smith to J.L. Fisher, Dec. 24, 1892, K.C. Fisher Papers, Calhoun State University, Special Collections, Accession No. 5346-9, box 2, folder 8

4. Original version: 35 mm slide of a Van Briggle dark blue vase, slide no. 101 in the Modern Pottery Slide Collection, San Francisco Institute of Art.

5. Originally published as: Geek Love (New York: Warner Books, 1990), ISBN: 0446391301, 355 p. — *for a digitized version of a published book described in Source element.*

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Publisher

Revised: December 13, 2010

E.6. Publisher
Name: Publisher
Use: Mandatory if applicable
Repeatable: Yes
Controlled Vocabulary: None
Indexed by system: Recommended
Display to users: Recommended
Label for display to users: Publisher
Semantic equivalents: 260 ##$b (Publication, Distribution, etc. (Imprint)/Name of publisher, distributor, etc.)
See also: Digital Publisher

Usage Guidelines:

The entity responsible for making the original resource available. A Publisher can be a person, an organization, or a service.

If the resource was digitized from a non-digital source and made available on the web, do not consider the agent that provided digitization and/or access the publisher. For example, if UF digitizes a book for the Florida Heritage Project, neither UF nor the Florida Heritage Project should be listed as the publisher of the online resource. Use the local element Digital Publisher instead.

If the resource is born-digital and made available online for the first time, the agent that made the resource available can be entered in Publisher.

Input Guidelines:

1. Use an authority file if possible, preferably the Library of Congress Name Authorities at http://authorities.loc.gov.

2. Enter multiple publishers in the order in which they appear on the resource or in order of their importance. Use multiple fields to enter multiple publishers.

3. If the publisher is the same as the creator, enter the name in both the Publisher and Creator elements.

4. Enter group or organization names in full, direct form. In the case of a hierarchy, list the parts from the largest to smallest, separated by periods as suggested in Creator. However, in the case of a long group or organization name that includes subordinate units, sometimes the name can be shortened by eliminating some of the hierarchical parts not considered necessary for uniquely identifying the body in question. For example, to enter the CIA as a contributor, use the form of the name as given in Library of Congress Authorities ("United States. Central Intelligence Agency") instead of the full hierarchical name ("United States. National Security Council. Central Intelligence Agency").

5. Where the geographic location of the publisher is known, use the geographic location separated by colon and followed by the publisher name.
Example:
City, State: Publisher name
State: Publisher name
City: Publisher name

Examples:

Funky Websites, Inc.
Carmen Miranda
University of Virginia Press
National Academy of Science
Tennessee Valley Authority. Division of Natural Resources.
State of Florida. Department of Agriculture and Consumer Affairs.

Keystone View Company
Microsoft Corporation
National Academy of Science
United States. Government Printing Office.
New York: Dial Publishing Company
London: Union of Democratic Control
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Language

Revised: May 28, 2010

E.7. Language
Name: [Language](#)
Use: Optional
Repeatable: Yes
Controlled Vocabulary: Recommended - "English Name of Language" column at
http://www.loc.gov/standards/iso639-2/php/English_list.php
Indexed by system: Recommended
Display to users: Recommended
Label for display to users: Language
Semantic equivalents: MARC 546, 041

Usage Guidelines:

Indicates the language(s) of the intellectual content of the resource. This implies the language(s) in which a text is written or the spoken language(s) of an audio or video resource. Visual images do not usually have a language unless there is significant text in a caption or in the image itself. (From *CDP Dublin Core Metatadata Best Practices Version 2.1.*)

Input Guidelines:

1. A resource may include multiple languages. Use separate Language elements to enter multiple languages.

2. Recommended best practice is to use the natural English name of the language, example: Spanish, English, etc. Use the controlled vocabulary from the "English Name of Language" column at http://www.loc.gov/standards/iso639-2/php/English_list.php (These guidelines deviate from CDP and DCMI guidelines to use 3 letter language codes. Natural English language names provide better searchability, indexability and display to the user.)

3. In addition to using the Language element, a textual description of the nature of the language(s) may be

included in the [Description](#) element. Examples of possible Description text:
In German and English, in parallel columns.
Title in Latin, content in English.
Primarily English, with some abstracts also in French.
Examples:
1. (A text in two languages)
Language: English
Language: French
Description: Primarily English, with some abstracts also in French.

Note: The "language" facet in Mango is generated from a 3-character code in the MARC 008. This code would have to be provided by program by mapping from the value of the Language element when converting Dublin Core to MARCXML for Mango.
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Coverage

Revised: December 13, 2010

E.8. Coverage
Name: [Coverage](#)
Use: Mandatory if applicable. Particularly recommended for use in describing maps, globes, and cartographic resources or when place or time period cannot be adequately expressed using the Subject element.
Repeatable: Recommended
Controlled Vocabulary: Recommended. Can be chosen by the local project manager.
Indexed by system: Yes
Display to users: Yes
Label for display to users: Place/Time
Semantic equivalents: LOC Mapping: # Unqualified: 500$a (General note)

Refinements: [Spatial Coverage](#), [Temporal Coverage](#)

Usage Guidelines:

Dublin Core definition: The extent or scope of the content of the resource.

Coverage refers to time period(s) or location(s) that the intellectual content of a resource concerns, not to publication information or other details about the resource.

Use the Coverage element for simple place and/or time. For complex data that needs more explanation, use the refinements: Temporal Coverage and/or Spatial Coverage.

Input Guidelines:

1. See <u>Temporal Coverage</u> and <u>Spatial Coverage</u> for more details about entering this data.
Examples:
Florida
North America
Paris in the 1920s
Colonial America
Ming Dynasty
15th century
Juno Beach, circa 1960
<u>Return to Top of Document</u>

Spatial Coverage

Revised: December 14, 2010

E.8a. Spatial
Name: <u>Spatial Coverage</u>
Use: Mandatory if applicable. Particularly recommended for use in describing maps, globes, and cartographic resources or when place or time period cannot be adequately expressed using the Subject element.
Repeatable: Yes
Controlled Vocabulary: Recommended. Can be chosen by the local project manager.
Indexed by system: Recommended
Display to users: Yes
Label for display to users: Place
Semantic equivalents: 651 (place name) and 662 (hierarchical place name); also 751 (place name) and 752 (hierarchical - place name).

Usage Guidelines

Dublin Core definition: Spatial characteristics of the resource, the spatial applicability of the resource, or the jurisdiction under which the resource is relevant.

Spatial Coverage refers to the location(s) covered by the intellectual content of the resource, not the place of publication. For artifacts or art objects, the spatial characteristics usually refer to the place where the artifact/object originated.

Use Spatial Coverage in preference to <u>Coverage</u> unless the coverage information is very simple.

Input Guidelines

1. Spatial coverage may be indicated by place names, longitude and latitude, or other sets of coordinates.

2. Multiple places or physical regions may be associated with the intellectual content of the resource. No hierarchy is implied. Use separate Spatial Coverage elements for each place.

3. When using coordinates, recording as decimal degrees is preferred. Locations east of the Greenwich prime meridian or north of the equator are expressed as positive numbers. A plus sign before the numbers may be used but is not required. Locations west of Greenwich or south of the equator are expressed as negative numbers and are preceded by a minus sign. For example, coordinates for Tampa, Fla. would be expressed in decimals as Lat.: 40.1500 and Long.: -104.4500 (located west of Greenwich meridian, so minus sign is needed before decimals).

4. Alternatively, coordinates may be entered as degrees, minutes, seconds, followed by a one-character directional indicator, using the GNIS (Geographic Names Information System) standard: DDDMMSSXDDDMMSSX, with D=degrees, M=minutes, S=seconds, X=directional indicator (N, S, E, or W); citing the latitude first, following by the longitude. Two spaces are provided for latitude and three spaces for longitude degrees. Use leading zeros if needed to fill up allotted spaces. For example, Tampa, Fla. coordinates would be expressed as 400900N1042700W.

5. For entering place names, a controlled vocabulary such as Getty Thesaurus of Geographic Names is recommended (http://www.getty.edu/research/conducting_research/vocabularies/tgn/).

Examples:
1. 432100N1105500W [Latitude/longitude for Rocky Mountains]
2. Lat.: 43.3500 Long.: -110.9167 [Latitude/longitude in decimal degrees for Rocky Mountains]
3. SN 045 055 [A place in Wales, using the UK Ordnance Survey Grid System]
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Temporal Coverage

Revised: December 14, 2010

E.8. Temporal

Name: Temporal Coverage
Use: Mandatory if applicable. Particularly recommended for use in describing maps, globes, and cartographic resources or when place or time period cannot be adequately expressed using the Subject element.
Repeatable: Yes
Controlled Vocabulary: Recommended. Can be chosen by the local project manager.

Indexed by system: Recommended
Display to users: Yes
Label for display to users: Time Period

Semantic equivalents: 045 (time period of content). Time periods are also incorporated into 651 when history subheadings are used (example: United States – History – Revolution, 1775-1783).

Usage Guidelines:

Use Temporal Coverage for the time period or era covered by the intellectual content of the resource (e.g., Jurassic, 1900-1920), not the publication date. For art objects, temporal characteristics refer to the date or time period during which the artifact/object was made.

Use Temporal Coverage in preference to Coverage unless the temporal information is very simple.

Input Guidelines:

1. Multiple dates and time periods may be associated with the intellectual content of the resource. No hierarchy is implied. Use separate Temporal Coverage elements for each date/time period.

2. Express dates in natural language when possible, e.g. "July 4, 1776", "200 B.C.E."
3. Use hypens to show a date range, e.g. "1900-1901", "July 1945-June 1946"

4. To show that a date is approximate, follow it with a question mark, e.g. "1997?"

Examples:
July 4, 1776
November 1956
July 1, 2009-June 30, 2010
1940?
96 B.C.E.
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Identifier

Revised: December 15, 2010

E.9. Identifier

Name: Identifier
Use: Optional but recommended; IID is required if applicable
Repeatable: Yes

Controlled Vocabulary: Use controlled vocabulary for identifier type as noted in Guideline #3 below.
Indexed by system: Recommended
Display to users: Recommended
Label for display to users: Identifier
Semantic equivalents: 035a, 856u

Usage Guidelines

Identifier is meant to contain a character string or number that clearly and uniquely identifies a digital object or resource. The Identifier element ensures that individual digital objects can be accessed, managed, stored, recalled, and used reliably. If the Identifier is an actionable link, it should connect directly to the resource, not to metadata about the resource. Do not use Identifier to identify the non-digital source of a digital object, such as ISSN or ISBN. These can be recorded in the Source element.

The identifier can be a locally or externally assigned ID number designating the specific resource. Do not use for the local system number (e.g. the DigiTool PID) but for other externally known identifiers associated with the resource.

If using DigiTool Ingest, do not use the Identifier element to associate a filestream with the metadata. Instead, follow the instructions on the DigiTool wiki "Ingest Workflows and Documentation". See "One object with MARC or DC records" (http://wiki.fcla.edu:8000/DigiTool/66) and "A batch of objects with MARC or DC records" (http://wiki.fcla.edu:8000/DigiTool/67).

Input Guidelines:

1. Recommended best practice is to identify the resource by means of a string conforming to a formal identification system. Examples of formal identification systems include the Uniform Resource Locator (URL) and the Digital Object Identifier (DOI).

2. Specify the type of identifier in parenthesis before the identifier, e.g. (DOI). Do this even if the type of identifier is included in the identifier name itself. e.g. (DOI) doi:10.1109/ISSTA.2002.1048560.

3. Recommended best practice is to use an authority list for recording identifier types. This list is currently:

DOI Digital Object Identifier
FDA The Intellectual Entity identifier assigned by the Florida Digital Archive
HDL Handle System identifier (handle)
IID Item Identifier, a control number assigned by the contributing library
URL Uniform Resource Locator; use also for PURLs

4. A record may include multiple identifiers. Use separate Identifier elements when more than one exist for the resource.

Examples:
(IID) WF00012215
(DOI) DOI:10.1219/10223954
(URL) http://www.uflib.ufl.edu/UFDC/?c=dloc
(URL) http://purl.fcla.edu/fcla/etd/UFE0024124

5. The IID "Item Identifier" is called "Entity ID" in PALMM collections and is 10 or 12 characters long, usually beginning with a 2 or 3-character institution or project identifier (e.g.: FI00001234, UF50120592, RTJJ09182738). It is called "Bib ID" in UFDC and is generally 10 characters followed by a hyphen and 4 characters (e.g.: UF08946351_0001). If the item in question has an IID, this should ALWAYS be entered in Identifier.

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Rights

Revised: January 28, 2011

E.10. Rights
Name: Rights
Use: Optional
Repeatable: Yes
Controlled Vocabulary: None
Indexed by system: Not recommended
Display to users: Recommended
Label for display to users: Rights
Semantic equivalents: 540 ##$a (Terms Governing Use and Reproduction Note), 506##$a (Restrictions on Access Note)

Usage Guidelines

Dublin Core Description: Information about rights held in and over the resource. Dublin Core comment: Typically, rights information includes a statement about various property rights associated with the resource, including intellectual property rights.

Rights may contain a rights management or usage statement, a URL that links to a rights management statement, or a URL that links to a service providing information on rights management for the resource. A rights management statement may contain information concerning accessibility, reproduction of images, copyright holder, restrictions, securing permissions for use of text or images, etc. From dublin-core-bp.pdf and (http://www.ncecho.org/dig/ncdc2007.shtml#5.15)

Based on the specific rights need for any item, this statement can be a general copyright statement for the

institution or collection, or a specific statement for the given resource.

Input Guidelines

1. Use separate Rights elements to enter multiple rights statements.

2. Enter a textual statement and/or a URL pointing to a use and access rights statement for digital resources on the Internet.

3. Make sure it is clear that the rights statement corresponds to the digital resource rather than the original resource.

Examples

1. All rights to images are held by the respective holding institution. This image is posted publicly for non-profit educational uses, excluding printed publication. For permission to reproduce images and/or for copyright information contact Special Collections & Archives, Florida Atlantic University Libraries, 561-297-3787. http://www.library.fau.edu/depts/spc/special.htm E-mail: LYSCA@fau.edu

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9. http://memory.loc.gov/ammem/collections/hurston/znhres.html *(URL for a complete copyright statement)*

10. http://content.lib.washington.edu/aipnw/copyrights.html *(URL for a complete copyright statement)*
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Format

Revised: December 15, 2010

E.11. Format

Name: Format
Use: Recommended
Repeatable: Yes
Controlled Vocabulary: None
Indexed by system: Not recommended
Display to users: Recommended
Label for display to users: Format
Semantic equivalents: MARC 300 subfields a and c

Usage Guidelines:

Use Format to record the extent (number and duration) and dimensions (size) of the resource. Do not use Format to record MIME type, media type, or physical carrier. (This rule deviates from the DCMI guidelines.) Do not use refinements (narrower elements) Medium or Extent.

Input Guidelines:

1. For extent, do not record the number and type of digital files (e.g. 1 PDF, 2 MP3s, etc.) but give the details about the content. For example, for a 151 page PDF report, record extent as "151 p." not as "1 PDF"; for a 27 minute MP3 audio file, use "27 mins" not "1 MP3".

2. For dimensions, if the object has been digitized from a non-digital version, record source dimensions; e.g. record "4 x 6 in." not "300 x 600 px." If born digital, digital dimensions can be recorded. Do not

record size in bytes.

3. Optionally, the term "digital" can be appended to extent or dimensions. E.g.:

4 x 6 in.:digital

Examples:
1. 46 p.; 19 cm.
2. 4 x 6 in.
3. 1 sound recording (ca. 27 min.), 1 transcript (16 p.)
4. 720 x 540 px.
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Type

Revised: December 15, 2010

E.12. Type

Name: Type
Use: Mandatory if applicable
Repeatable: Yes
Controlled Vocabulary: A controlled vocabulary of genre terms should be used. Genre terms consistent with Library of Congress Subject Headings are recommended. Terms from Thesaurus for graphic materials: TGM II, Genre and physical characteristic terms http://www.loc.gov/rr/print/tgm2/ or MARC genre terms http://www.loc.gov/standards/valuelist/marcgt.html may also be used. Also consult the following webpage LOC's Genre/Form Code and Term Source Codes http://www.loc.gov/standards/sourcelist/genre-form.html to look up thesauri and genre heading lists.
Indexed by System: Yes
Display to users: Yes
Label for display to users: Object Type
Semantic equivalents: MARC field 655 - Index Term-Genre/Form

Usage Guidelines:

Dublin Core definition: The nature or genre of the resource. To describe the size or extent of the resource, use the Format element.

Input Guidelines:

1. The Type element will be mapped to MARC 655 for display in Mango, where it is treated as a genre facet. Therefore input values should be consistent with genre terms used in cataloging. Some usable

thesauri are noted in "Controlled Vocabulary" above. Do not use the DCMI Type Vocabulary, which lists media types rather than genre types.

2. Some objects may express more than one genre, e.g., a "group portrait" may also be a "photographic print". Use separate Type elements to enter multiple genre types.

Examples:
1. Children's stories
2. Celtic music
3. Chamber music
4. Folk drama
5. Foreign language films
6. Scrapbooks
7. Television plays
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Date

Revised: December 15,2010

E.13. Date

Name: Date
Dublin Core definition: A point or period of time associated with an event in the lifecycle of the resource.
Dublin Core comment: Date may be used to express temporal information at any level of granularity. Recommended best practice is to use an encoding scheme, such as the W3CDTF profile of ISO 8601 [W3CDTF].
Use: Mandatory if applicable
Repeatable: Yes, but use each refinement no more than once.
Controlled Vocabulary: None
Indexed by system: Recommended
Display to users: Recommended
Label for display to users: Date
Semantic equivalents: 260 ##$c (Date of publication, distribution, etc.)

Refinements: Created, Available, Issued, Modified, Date Submitted, Date Accepted, Date Copyrighted. (Note that the first four Date refinement terms were among the earlier ones approved by DCMI, and the naming convention of the time was not to include "date" as part of the name.)

Usage Guidelines

All dates should pertain to the original resource being described. Dates relating to digital surrogates

should be maintained in conjunction with other administrative or preservation metadata.

For most materials Date should contain the date the original item came into existence. For serials, however, use the date of coverage. For example, the proceedings of a 1998 conference may not have been published until 1999; for Date use 1998 which was the coverage date.)

Because resources have several dates associated with their lifecycle, the elements Available, Issued, Modified, Accepted, and/or Copyrighted may be used in addition to or instead of Date when applicable.

Name: *Created*
Label: Date Created
Term description: Date of creation of the resource.
Guidelines for creation of content: If the only date recorded is the date of creation, use Date. If multiple date types are recorded, use Created for the date of creation.
Semantic equivalents: 260 ##$c (Date of publication, distribution, etc.)

Name: *Available*
Label: Date Available
Term description: Date (often a range) that the resource will become or did become available.
Guidelines for creation of content: In general, the Available should be used in the case of a resource for which the date of availability may be distinct from the date of creation, and the date of availability is relevant to the use of the resource.
Available: 506 $a (Hours, Etc.)

Name: *Issued*
Label: Date Issued
Term description: Date of formal issuance (e.g., publication) of the resource.
Guidelines for creation of content: The term Issued should be applied when a formal date of issuance or publication is relevant to the resource, and is distinct from other dates that may be used with the resource.
Semantic equivalents: 260 $c (Date of publication, distribution, etc.)

Name: *Modified*
Label: Date Modified
Term description: Date on which the resource was changed.
Guidelines for creation of content: Modified dates may be used to record either all instances of modification or only the latest. When only one modified date is recorded, it is assumed to be the latest.
Semantic equivalents: 046 $j (Special Coded Dates/Date modified)

Name: *Date Submitted*
Label: Date Submitted
Term description: Date of submission of the resource (e.g. thesis, articles, etc.).
Guidelines for creation of content: If, in the lifecycle of a resource, the date of submission to a body or entity is relevant to the use of the resource, Date Submitted may be used. Recommended for ETDs and IR

materials, not for all digitized materials. Date Submitted normally precedes Date Accepted.
Semantic equivalents: 502 $a (Dissertation Note) with initial label "Date submitted"

Name: *Date Accepted*
Label: Date Accepted
Term description: Date of acceptance of the resource (e.g. of thesis by university department, of article by journal, etc.) by the governing body.
Guidelines for creation of content: If, in the lifecycle of a resource, the date of acceptance by a formal body or entity is relevant to the use of the resource, Date Accepted may be used. Date Accepted normally follows Date Submitted.
Semantic equivalents: 502 $a (Dissertation Note) with initial label "Date accepted"

Name: *Date Copyrighted*
Label: Date Copyrighted
Term description: Date of a statement of copyright.

Guidelines for creation of content: If, in the lifecycle of a resource, the date of copyright is relevant to the use of the resource, Date Copyrighted may be used. Use only if the information is readily available.
Semantic equivalents: 260 $c (Date of publication, distribution, etc.) or 542 $g (Information Related to Copyright Status/Copyright date)

Input Guidelines:

1. Enter dates for different purposes in separate elements. Only one instance per refinement should be used.
2. Do not insert a preface that repeats the distinction created by the element name. For instance, if you enter "Accepted 2001-02-11" into Date Accepted, it may display as "Date Accepted: Accepted 2001-02-11"

3. Enter dates in the form "YYYY-MM-DD" in accordance with the W3C Date Time Format (W3C-DTF) encoding scheme. Use a single hyphen to separate the year, month, and date components:
a. Year YYYY ("1997" for the year 1997)
b. Year and month: YYYY-MM ("1997-07" for July 1997)
c. Complete date: YYYY-MM-DD ("1997-07-16" for July 16, 1997)

4. For a range of dates, enter dates in accordance with the DCMI Period encoding scheme, separating them with a hyphen as in "2002-2004."

5. Follow dates with a question mark ("1997?") to show a date is approximate (a "circa" date).

6. If date is unknown, omit the Date element. If date is known but not on the resource, i.e. a cataloger supplied date, use Date and do not enclose the date in brackets.

7. If text is needed to explain the date, enter the text in parentheses after the date.

Examples:
1998 (reprinted)

Examples:
Single dates
1. April 5, 2004: 2004-04-05
2. July 2003: 2003-07
3. Date with only year known: 1996
4. Date for digitized article reprint: 1948 (reprinted)

Range of dates
5. Date span: 1996-04-01 - 1996-04-30
6. July 4, 2003 to July 10, 2003: 2003-07-04 - 2003-07-10
7. July 2003 to August 2003: 2003-07 - 2003-08
8. 2003 to 2004: 2003 – 2004

Relation

Revised: December 15, 2010

E.14. Relation
Name: Relation
Use: Do not use the simple Relation element. Use one or more of the refinements listed below.
Repeatable: Yes (refinements)
Controlled Vocabulary: None (refinements)
Indexed by System: Yes (refinements)
Display to Users: Yes (refinements)

Refinements: isPartOf, hasPart, otherVersion, otherFormat, isReferencedBy, references, isBasisFor, isBasedOn, requires, isRequiredBy, replaces, isReplacedBy, conformsTo

Notes: In these guidelines "described resource" signifies the resource being described in the metadata as a whole. "Referenced resource" signifies the related resource indicated.

Usage Guidelines

Do not use Relation. Use one or more of the Refinements listed above.

Relationships may be expressed reciprocally (if the resources on both ends of the relationship are being

described) or in one direction only, even when there is a refinement available to allow reciprocity.

To indicate the source of a derivative version, use [Source].

Input Guidelines

1. Describe only one relationship per field. Use separate elements to describe multiple relationships.

2. Text strings, identifying numbers, and/or URIs may be used to indicate the referenced resource. Include sufficient information to enable users to identify, cite, and either locate or link to the referenced resource.

3. If using a standard number such as the Library of Congress Control Number (LCCN) or a system number, include a designation of the type of standard number.
Examples:
(IID) WF00012215
(DOI) DOI:10.1219/10223954
(URL) http://www.uflib.ufl.edu/UFDC/?c=dloc
(URL) http://purl.fcla.edu/fcla/etd/UFE0024124

4. If using a text string, the reference should be appropriately specific. For instance, a formal bibliographic citation might be used to point users to a particular resource.

Refinements

Each refinement is described below with a definition, MARC semantic equivalents, and examples. CAUTION: The examples are intended to show the concept behind each refinement, but do not show the complete citation needed for a well-formed element according to the Input Guidelines.

Part/Whole relations are those in which one resource is a physical or logical part of another.

Name: isPartOf
Label for display to users: Is Part Of
Definition: The described resource is a physical or logical part of the referenced resource.
Semantic equivalents: 772 (Supplement parent), 773 (Host entry)

Name: hasPart
Label for display to users: Has Part
Definition: The referenced resource is a physical or logical part of the described resource.
Semantic equivalents: 774 (Constituent unit)

Examples:
Title="Reading Turgenev"
IsPartOf="Two Lives"

[Resource is a collection of two novellas, one of which is "Reading Turgenev"]

Title="Lord of the Rings"
HasPart="Two Towers"
Resource is a trilogy of films, the second of which is "Two Towers"

Version relations are those in which one resource is an historical state or edition, of another resource by the same creator

Name: otherVersion
Label for display to users: Other Version(s)
Definition: The referenced resource is a version (intellectual variant, other edition, etc.) of the described resource. Do not use for versions in different file formats; use OtherFormat instead.
Semantic Equivalents: 775 (Other edition), 787 (other relationship)
Note: Dublin Core defines two terms, isVersionOf and hasVersion. For local use, we recommend a single refinement, otherVersion, because the order in which different versions are created is often unknown or

unimportant, and resources may often be created in different versions simultaneously.

Example:
Title="Candle in the Wind"
Subject="Diana, Princess of Wales"
Date="1997"
Creator="John, Elton"
Type="sound"
Description="Tribute to a dead princess."
OtherVersion="Candle in the Wind (1976, Yellow Brick Road)"

[The original song, a tribute to Marilyn Monroe, was rewritten after Diana's death to honor her at her funeral]

Format transformation relations are those in which one resource has been derived from another by a reproduction or reformatting technology which is not fundamentally an interpretation but intended to be a representation.

Name: otherFormat
Label for display to users: Other Format(s)
Definition: The referenced resource is equivalent to the described resource but encoded in a different file format.
Semantic Equivalents: 776 (Additional Physical Format)
Note: Dublin Core defines two refinements, isFormatOf and hasFormat. For local use, we recommend a single refinement, otherFormat, because the order in which different formats are created is often unknown or unimportant, and resources may often be created in different formats simultaneously.

Examples:
Title="Electronic AACR2"
OtherFormat="Anglo-American Cataloging Rules, 2nd edition"

Title="Landsat TM dataset of Arnhemland, NT, Australia"
OtherFormat="arnhem.gif"

Reference relations are those in which the author of one resource cites, acknowledges, disputes or otherwise make claims about another resource.

Name: isReferencedBy
Label for display to users: Is Referenced By
Definition: The described resource is cited or otherwise referenced in the referenced resource.
Semantic Equivalents: 787 (Other relationship)

Name: references
Label for display to users: References
Definition: The described resource cites or otherwise references the referenced resource.
Semantic Equivalents: 787 (Other relationship)

Examples:

Title="Morgan's Ancient Society"
IsReferencedBy="Engels' Origin of the Family, Private Property and the State"

Title="Nymphet Mania"
References="Adrian Lyne's 'Lolita'"

Creative relationships are those in which one resource is a performance, production, derivation, adaptation or interpretation of another resource.

Name: isBasisFor
Label for display to users: Is Basis For
Definition: The referenced resource is in some manner based upon the described resource.
Semantic Equivalents: 787 (Other relationship)

Name: IsBasedOn
Label for display to users: Is Based On
Definition: The described resource is in some manner based upon the referenced resource.
Semantic Equivalent: 787 (Other relationship)

Examples:
Title="Casablanca" (1942 film)

IsBasisFor="BarbWire" (1996 film)

Title="My Fair Lady"
IsBasedOn="Pygmalion"

Dependency relations are those in which one resource requires another resource (bibliographic object, device, software, etc.) for its functioning, delivery, or content and cannot be used without the related resource being present.

Name: Requires
Label for display to users: Requires
Definition: Use of the described resource is somehow dependent upon the referenced resource.
Semantic Equivalents: 538 (System Details)

Name: isRequiredBy
Label for display to users: Is Required By
Definition: The described resource is somehow necessary to the use of the referenced resource.
Semantic Equivalent: 787 (Other relationship)

Examples:
Title="Dead Ringer"
Requires="Gemstar e-book reader"

Title="Plants vs. Zombies"
Requires="iPad"

Title="Programmed Independent Math Practice"
Requires="Cellophane Answer Finder"

Title="Cellophane Answer Finder"
IsRequiredBy="Programmed Independent Vocabulary Practice"

[Answers in the workbooks are overprinted with red ink; by covering the area with the red "Cellophane Answer Finder," students can correct their own work; the same object can be used with any book in the Programmed Independent Practice Series"]

Replacement relations are those where one resource replaces or is replaced by another.

Name: replaces
Label for display to users: Replaces
Definition: The described resource is a replacement for the referenced resource.
Semantic Equivalent: 780 (Preceding Entry)

Name: isReplacedBy
Label for display to users: Is Replaced By
Definition: The referenced resource replaces the described resource.
Semantic Equivalent: 785 (Succeeding Entry)

Examples:
Title="Diagnostic and statistical manual of mental disorders, DSM-III-R"
IsReplacedBy="Diagnostic and statistical manual of mental disorders,DSM-IV"

Title="Diagnostic and statistical manual of mental disorders,DSM-IV"
Replaces="Diagnostic and statistical manual of mental disorders, DSM-III-R"

Name: conformsTo
Label for display to users: Conforms To
Defintion: The described resource is compliant with or is an instance of the referenced resource.
Semantic Equivalent: N/A

Examples:
Title="Free Worksheets for Teachers"
ConformsTo="Web Content Accessibility Guidelines 1.0"
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Subject

Revised: December 16, 2010

E.15. Subject

Name: Subject
Use: Mandatory if applicable
Repeatable: Yes
Controlled Vocabulary: Recommended - "LOC's Subject Authority Headings" at
http://authorities.loc.gov/cgi-bin/Pwebrecon.cgi?DB=local&PAGE=First . Can also use other controlled
vocabularies suggested at http://www.bcr.org/dps/cdp/best/dublin-core-bp.pdf
Indexed by system: Recommended
Display to users: Recommended
Label for display to users: Subject
Semantic equivalents: 082 Subject DDC, 050 Subject LCC, 600, 610, 611, 630, 650 if ind2=0 Subject
LCSH, 600, 610, 611, 630, 650 if ind2=2 Subject MeSH, 655 if ind2=7 & $2=tgn Subject TGN

Usage Guidelines:

Dublin Core Description: The topic of the content of the resource. Typically, a Subject will be expressed as keywords or key phrases or classification codes that describe the topic of the resource. Recommended best practice is to select a value from a controlled vocabulary or formal classification scheme.

Subjects may be personal or organization names as well as topics, places, forms, and events.

To represent genre (like photograph, artists book etc.) use the Type element and not Subject.

In general, choose the most significant and unique words for subjects, avoiding those too general to describe a particular item. However, if the implementation guidelines for a particular collection call for the additional use of more generic subject terms, use those guidelines. For example, the Florida Heritage Collection specifically instructs the usage of more generic subjects.

Input Guidelines:

1. Use a separate Subject element for each Subject.

2. If the subject of the item is a person or an organization, use the same form of the name as you would if the person or organization were a Creator or Contributor.

3. Where subjects are taken from LCSH, the subfields of the subject heading should be separated by double dash (–) and spaces should be omitted. Do not use ending punctuation.

Examples:
1. Coal miners– West Virginia– Jackson County
2. World War, 1939-1945–Germany
3. Arapahoe County (Colo.)
4. Student protesters
5. Soviet Union –Politics and government –1917-1936
6. Strikes and lockouts
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Digital Publisher

Revised: December 16, 2010

E.16. Digital Publisher
Name: Digital Publisher
Use: Mandatory if applicable
Repeatable: Yes
Controlled Vocabulary: None
Indexed by system: Recommended

Display to users: Recommended
Label for display to users: Digital Publisher
See also: Publisher

Usage Guidelines:

The entity responsible for making a digitized resource available. A Publisher can be a person, an organization, or a service. Use if the resource was digitized from a non-digital source and made available on the web. For example, if UF digitizes a book for the Florida Heritage Project, UF should be listed as the Digital Publisher of the online resource.

Do not use if the resource is born-digital. The agent that made the resource available can be entered in Publisher.

Input Guidelines:

1. Use an authority file if possible, preferably the Library of Congress Name Authorities at http://authorities.loc.gov.

2. Use multiple fields to enter multiple digital publishers.

3. If the publisher is the same as the creator, enter the name in both Digital Publisher and Creator elements.
4. For guidelines in formatting digital publisher names, see the Input Guidelines for Publisher.
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Link to Source

E.17. Link to Source
Name: Link to Source
Use: Optional
Repeatable: Yes
Controlled Vocabulary: None
Indexed by system: Not recommended
Display to users: Recommended
Label for display to users: Link to Source
Semantic equivalents: USMARC: 786 (Data Source Entry) or 776 (Additional Physical Form Entry)

See also: Relation, Source.

Usage Guidelines:

Use for a hotlink (URL) to a bibliographic description of the source from which a digital resource is derived. Usually this will be in a library catalog or similar system.

Do not use Link to Source to enter a textual citation to the source material. Instead use the related "Source" field.

Input Guidelines:

1. Enter a complete URL, e.g. http://union.catalog.fcla.edu/ux.jsp?st=018616407&ix=nu&I=0&V=D

2. Do not enter any text in this field before or after the URL.

3. Becareful to use only permalinks (unchanging URLs).

Background and Lists of Standards, Guidelines, etc.

Revised: January 28, 2011

1. Background and Lists of Standards, Guidelines, etc.

a. Best Practice Guidelines for Digital Collections (University of Maryland)
b. Digital Libraries: Metadata Resources (IFLA). Last rev. 2005.
c. International Metadata Initiatives: Lessons in Bibliographic Control / Priscilla Caplan. Final vers. 2001.
d. Metadata and Cataloging Online Resources
e. Metadata Standards, Crosswalks, and Standard Organizations Last updated 2009. (Cataloguer's Toolbox)
f. PALMM Documentation and Other Resources (FCLA/PALMM)
g. ShareableMetadataPublic: Best Practices for Shareable Metadata (Digital Library Federation)
h. Standards at the Library of Congress
i. Understanding Metadata c2004. ISBN: 1-880124-62-9. (NISO)

Specific Standards, Guidelines, etc.

Revised January 28, 2011

2. Specific Standards, Guidelines, etc.

a. Cataloging Cultural Objects

b. Data Standards and Guidelines (Getty)

1. [Introduction to Metadata](). Online ed., ver. 3.0. 2008.
2. [Categories for the Description of Works of Art]() Rev. June 2009.
3. [Introduction to Archival Organization and Description]() / Michael J. Fox, Peter L. Wilkerson. c1998. Title page and table of contents: book is out of print.
4. [Metadata Standards Crosswalk]() [CDWA, CCO, CDWA Lite, VRA 4.0 XML, MARC/AACR, MODS, Dublin Core, DACS, EAD, Object ID, CIMI, FDA Guide]

c. Dublin Core
1. [Dublin Core Metadata Initiative]()
2. [Dublin Core to MARC Crosswalk]() (Library of Congress)
3. [Encoding Guidelines]() [Dublin Core expressed in RDF, XML, HTML/XHTML]
4. [Metadata Training Resources]()
5. [Dublin Core Metadata Element Set, Version 1.1]()
6. [Using Dublin Core]() / Diane Hillman. 2005.
7. [UW Libraries Dublin Core Data Dictionaries]()
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d. EAC: Encoded Archival Context.
1. [Encoded Archival Context - Corporate Bodies, Persons and Families]() Rev. 2008?
2. [Encoded Archival Context]() 2008. (Wikipedia)
3. Related information:
[ISAAR(CPF): International Standard Archival Authority Record for Corporate Bodies, Persons, and Families]() 2nd ed.
[ISAD(G): General International Standard Archival Description]() 2nd ed.

e. [EAD: Encoded Archival Description]() Vers. 2002. Last update 2008.
f. FRBR: Functional Requirements for Bibliographic Records
1. [Functional Requirements for Bibliographic Records]() 1998; 2009. (IFLA)
2. [The FRBR Model (Functional Requirements for Bibliographic Records)]() / Barbara B. Tillett. 2003. (Library of Congress)
3. [OCLC Research Activities and IFLA's Functional Requirements for Bibliographic Records]()
4. [Functional Analysis of the MARC 21 Bibliographic and Holdings Formats]() (Library of Congress)
5. [The FRBR Blog]()

g. [Functional Requirements for Authority Data: a Conceptual Model]() 2007 draft [FRAD] (IFLA)[NOTE: The final standard is not freely available online.]

h. MARC
1. [Understanding MARC]() / Betty Furrie, Follett Software Company. 8th ed. c2009. (Library of Congress)
2. [MARC Standards]() [Bibliographic, Authority, Holdings, Classification, Community] (Library of Congress)
3. [OCLC Bibliographic Formats and Standards]()

i. [MARCXML]() (Library of Congress)

j. [METS: Metadata Encoding & Transmission Standard](#) (Library of Congress)

1. [METS: an Overview & Tutorial.](#) 2006.

2. [METS Primer](#) Vers. 1.6.Rev. 2010

k. [MIX: NISO Metadata for Images in XML Schema: Technical Metadata for Digital Still Images Standard](#) (Library of Congress)

l. [MODS: Metadata Object Description Schema](#) (Library of Congress)

m. [Open Archives Initiative](#)

1. [The Open Archives Initiative Protocol for Metadata Harvesting](#) Protocol vers. 2.0 of 2002-06-14. Document vers. 2008-12-07T20 :42 :00Z

2. Related Resource:

[OAIster](#) [Union catalog of digital resources; uses OAI-PMH]

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n. [PREMIS: Preservation Metadata Maintenance Activity](#) (Library of Congress)

o. [RDA: Resource Description and Access](#) (Joint Steering Committee for Development of RDA)

p. [Registry of Digital Masters Record Creation Guidelines](#) Version 2, 2007. (Digital Library Federation)

q. [TEI: Text Encoding Initiative](#)

r. [VRA Core](#) (Visual Resources Association)

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Thesauri

Revised January 28, 2011

3. Thesauri

a. [Getty Vocabulary Program](#)

1. [The Art & Architecture Thesaurus (AAT)](#)

2. [The Union List of Artists Names (ULAN)](#)

3. [The Getty Thesaurus of Geographic Names (TGN)](#)

4. [The Cultural Objects Name Authority (CONA)](#) "Under development"

b. [GSAFD Genre Terms](#) (OCLC)

c. [LCSH topical headings usable as genre headings](#) / Joel Hahn.

d. [Library of Congress Authorities](#)
1. [MARC 21 Format for Authority Data](#)

e. [Medical Subject Headings](#) (MeSH) (National Library of Medicine)

f. [NASA Thesaurus](#)

g. [RBMS Controlled Vocabularies: Controlled Vocabularies for Use in Rare Book and Special Collections Cataloging](#) [Binding, Genre, Paper, Printing & Publishing Evidence, Provenance Evidence, Type Evidence]

h. [Terminologies Service: Multiple Thesauri in a Single Interface](#) (OCLC)

i. [Thesaurus for Graphic Materials](#) (Library of Congress)

j. [U.S. Board on Geographic Names](#)

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Peripheral Resources

4. Peripheral Resources

a. [eXtensible Catalog](#) (XC)

b. Semantic Web
1. [Semantic Web](#) (Wikipedia)
2. [W3C Semantic Web Activity](#)
c. [Topic Maps](#) (Wikipedia)

d. XML: Extensible Markup Language
1. [Extensible Markup Language (XML)](#)
2. [XML](#) (Wikipedia)

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Suggestions from DISC

1. Labels for some of the refinements of the Date field could be more specific. For example, Created can be labeled as "Date Created" instead of just Created, Valid can be labeled as "Date Valid" instead of

Valid, Available can be labeled as "Date Available" instead of Available, Issued can be labeled as "Date Issued" instead of Issued, and Modified can be labeled as "Date Modified" instead of Modified. Thus these labels become easier to be understood, and they stay consistent with other refinement labels for the Date element.

- o Lee will edit Name and Label, Example: Name Valid, Label Date Valid

2. Here are a few suggestions for the Spatial Coverage and Temporal Coverage labels. For Temporal Coverage I prefer "Temporal Coverage", "Time Period" or "Dates Covered" to just "Time". For Spatial Coverage I prefer "Location" to "Place". As for Coverage, perhaps including "Coverage" in the label or some similar wording would help users understand what the Place/Time refers to.

- o CRG decision Temporal = Time Period, Spatial = Place

3. The guidelines might provide more information to distinguish similar elements. In the guidelines, both Description and Abstract elements can contain abstract information. There is often a question about which element to choose when we want to input abstract information.

- o General rule: Use the most specific element or refinement available.
- o Put explanation in Description regarding use of abstract. If more specificity is needed, put in Abstract.
- o Priscilla will edit general guidelines to reflect use of most specific element or refinement available.

4. It appears that the element "Contributor" is missing from the guidelines. Would it be element #3?

- o Naomi has corrected

5. It appears the Subject element description is missing from the guidelines.

- o Was missing from our list. Still needs to be done.

6. For page 5, I recommend changing this:
"Proposals for new PALMM collections should be submitted to the Digital Initiatives Subcommittee for discussion. This alerts the other libraries who may want to contribute to the collection, or influence the scope."

To this:
"Proposals for new PALMM collections must be submitted to the Digital Initiatives Subcommittee (DISC) for discussion , and they must be approved by DISC before the new PALMM collection can be created. A PALMM collection must involve at least one state university. This alerts the other libraries

who may want to contribute to the collection, or influence the scope."

The added sentence "A PALMM collection must involve at least one state university" is from the existing information page about PALMM: http://fclaweb.fcla.edu/node/646/

7. Under the references section, this link is broken:
National Standards and Resources (FCLA/PALMM)
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Suggestions from Metadata Sub

Kim Montgomery of UCF is chair of the Metadata Subcommittee this year. She sent the Metadata members her list of comments regarding the CAGER guidelines and we talked briefly about it in our Metadata meeting last week. I told I would sit down with her list and look closely at the CAGER guidelines to understand her areas of concern and forward the comments on to CRG. What follows are Kim's comments on selected elements, references to the places in the CAGER guidelines on which she is commenting, and my thoughts. It's a pretty long e-mail, but I thought going into detail would give us enough info if we wanted to talk about it this Friday or in subsequent exchanges.

TITLE:
1. Under "semantic equivalents," we list MARC field 245 and the subfields 'a' and/or 'b'. Kim asks why subfields 'n' and 'p' are not included. In Input Guideline no. 11, one of the examples is "Tequesta: the journal of the Historical Association of Southern Florida. Volume 1, number 4." In MARC coding, a subfield n would preceded Volume 1, number 4. My thoughts: Should the 'n' and 'p' subfields be added to semantic equivalents, or is that splitting hairs finer than we want in the semantic equivalents?

2.Input Guideline no. 6 says exclude initial articles from the title when possible, but says "Exceptions might include when the article is an essential part of the title or when local practice requires use of initial articles." If the initial article is included, Kim asks, "should it be recommended to add an alternative title without the initial article? Depends on how title is searched." My thoughts: I guess Kim is thinking of a title browse search in which someone is searching a title without using the initial article, and would not retrieve it in a title browse because title begins with "the." I don't know how much of a concern that would be in practical terms. But we should still address Kim's concerns and our reasoning if we do not decide to make an alternative title with the article.

3. Input Guideline no. 13 says "When creating your own title it is advisable not to begin a title with the format." Then later it says The exception is oral history interviews, where the cataloging guidelines actually do say to begin titles with 'Oral history interview with...'." Kim wonders what cataloging guidelines are referred to here. I notice that the oral histories that are in the catalog under PALMM collection all have titles that start "'Oral history interview with..." But USF's records for its substantial oral history collection do not follow this guideline. These records are in our catalog only and are not part of PALMM. We should clarify that we are referring to PALMM projects when discussing "the cataloging

guidelines" here. Are the PALMM guidelines still in force? Maybe we link to them here?

ALTERNATIVE TITLE:
Kim pointed out a typo in Input Guideline no. 2. I have corrected it.

CREATOR:
1. Input Guideline no. 3 says If using established cataloging rules to construct Creator elements, follow those rules. Some examples of established rules include: Anglo-American Cataloging Rules, Describing Archives: A Content Standard, or Cataloging Cultural Objects." Kim's comment: Perhaps the first general listing of established cataloging rules that might be used should be introduced before the sections on the elements. Or noted that more info is at the end." After quoting guideline no. 3, she says "Title refers to cataloging guidelines, but they haven't been introduced or referred to yet in the document. The specifics such as in the chart in 3 do belong in the element sections." My thoughts: On this one, I don't see the confusion Kim alludes to. Maybe we could word the guideline slightly differently. But it isn't a problem for me.

2. Input guideline no. 4 links to Yale University's guidelines on formulating heading for Creators. Kim's comment: "At some point, this group [possibly referring to Metadata Subcommittee as well as CRG] should create its own guidelines for inputting creator. We cannot count on Yale maintain the same document or policies. Also, those guidelines only deal with personal names, not corporate names." My thoughts: Kim has a point that the Yale site could eventually be moved. But that's a possibility with almost any external link. If we have something from outside that has good advice, I think we should use it.

3. Kim is confused about this first example under Input Guideline no. 7. The guideline says "If a group or organization name includes subordinate units, list the parts from the largest to smallest, separated by periods." Then gives in the first example: "Red cross. United States. American national Red cross. Life saving and water safety." Kim asks, "Is the Red Cross larger than the United States, or is United States qualifying Red Cross?" As I looked at it, I was confused. It turns out that the heading Red cross. United States. American national Red cross is no longer a valid heading. This was used before AACR2 rules came into effect. The authorized heading is American National Red Cross. I think we should remove this example since it is misleading. Maybe we could use instead something like "United States. Army. Air Corps."

4. Input guideline no. 9 talks about how to formulate dates associated with a person's name. Kim says "If RDA is accepted, dates attached to names will change considerably." My thoughts: I confess I haven't absorbed RDA sufficiently to really see how much impact there will be. If and when RDA becomes the cataloging standard, we could revisit this document if we feel we should be more in compliance with it. Kim also pointed out that the final bullet point under this guideline did not have an example to go with the situation it was describing. I added an example, and also put a colon after the test describing the situation so that it would set off the example better. In the cases where we said not to use a particular date practice for 20th century names, I made this a parenthetical note after the example. It originally was part of the text that preceded the example.

PUBLISHER:

Kim points to Input Guideline no. 4, saying "Wording of instruction is unclear, though the example is clear." The guideline says "Specify the digital resource publisher in brackets after the publisher name. However, this usage is optional and not mandatory." This example is then given: Florida Atlantic University [digital version]. My thoughts: Looking at it now, I agree this confusing. Input guideline no. 3 says to use multiple fields to enter the physical object publisher and the digital object publisher. It gives as examples "McGraw Hill Inc. [original version]" and then "University of Central Florida [digital version]." So do we need input guideline no. 4?

Combined #3 and #4. Reworded #3 for clarification: 3. Enter multiple publishers in the order in which they appear on the resource or in order of their importance. Use multiple fields to enter multiple publishers. The publisher of the original version should be entered first, followed by additional publishers such as the publisher of the digital version. The version published can be specified in brackets after the publisher's name, but is not mandatory.

LANGUAGE:

We specifically say to "use the natural English language names for better searchability, indexability and display to the user" and that we are departing from CDP and DCMI guidelines to use 3 letter language codes. Kim says on this, "Which works better depends upon what system is used for searching. If Mango, then can the system use the full name? Does a search form need to be separate from a display form?" Maybe Priscilla can address this one best.

RIGHTS:

Input Guideline no. 2 says "Use separate Rights Management elements to enter multiple rights or clearly separate each entry by a semicolon or a space within an element." Kim would like an example showing this practice.

FORMAT:

Input Guideline no. 2 says "Do not use Format to record MIME type, media type, or physical carrier (The CRG group deviated from the DCMI comment in this guideline). Use only to record extent (number and duration) and dimensions (size). Do not use refinements (narrower elements) Medium or Extent." Kim says, "I think this is going to cause trouble in the future. Having extent in something called Format without the narrower element of extent will be confusing." I'm not certain what Kim's worry is on this. Maybe someone else has an answer that can address her concern.

TYPE:

Under Controlled Vocabulary, we list LC sites on Thesaurus of Graphic Materials and also Genre Terms. (These were not hot linked, so I made the links available.) We also link to Joel Hahn's list Kim's comment: "Wouldn't it be better to refer to the Genre/Form Code and Term Source Codes list at http://www.loc.gov/standards/sourcelist/genre-form.html rather than Hahn's list (although this list is ordered by code and does not have links to the thesauri)." She's also concerned that the Hahn list is the creation of a single person and could go away. My thoughts: The link Kim mentions lists the codes that

would be used in MARC cataloging for genres. We have the actual list of genre terms in the other LC link. The link Kim recommends lists more specialized genre terms that could perhaps be of value, but only a few of these are accessible though hot links from this list.

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Comparisons and changes for wiki and Word versions

09/24/2010 - DEC - C.3 I.e - Corrected typo, faciliate change to facilitate
09/24/2010 - DEC - C.4 Sentence after d) - Corrected typo, 852 change to 856

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