nCDS Filenaming, Workflow, and Metadata Guidelines

FRAMEWORK FOR BUILDING A COLLECTION: VERSION 4.2

Norwick Center for Digital Solutions (nCDS)

SOUTHERN METHODIST UNIVERSITY | DALLAS, TEXAS | MAY 18, 2018

Page Intentionally Left Blank

Preface

Cataloging has formed the foundation of library services since the inception of this profession, allowing patrons to find the resources that best meet their information needs. In the 20th century, the development of a global shared catalog (WorldCat) from libraries around the world provided a wonderful example of international cooperation unparalleled in most other spheres of public life.

Over the years, library science has been transformed in the digital environment. The creation of metadata schema and cataloging guidelines for digitized resources has led to a plethora of options. Using customized metadata cataloging guidelines that diverge from trusted standards like AACR2, and its more recent incarnation, RDA, necessitate the creation of well-documented guidelines to maintain consistency within and between digital collections.

In 2008, the Norwick Center for Digital Solutions (nCDS) created the first version of what was then called the *SMU CONTENTdm Guide: Framework for Building a Collection*. Version 1 described how nCDS creates metadata for digital collections that are made available online in SMU Libraries Digital Collections, along with the information architecture that underpins their structure. Throughout the years, our goal has been to capture metadata in a way that builds on the best of existing cataloging rules, while adding new styles that enhance the unique nature of our digitized special collections.

Version 4, introduced in January 2016, contained some of the most significant changes we have ever made. Most notably, we incorporated the use of new controlled vocabularies and added fields that will help us better prepare nCDS metadata for the future linked data universe—a world in which we very much want to participate. Version 4.1, introduced in February 2017, helps us continue along that path.

Cindy Boeke, Digital Collections Librarian
Assistant Director, Norwick Center for Digital Solutions
Central University Libraries, SMU

Introduction

The *nCDS Digital Collections: Filenaming, Workflow, and Metadata Guidelines: Framework for Building a Collection, Version 4.1 (V.4.1)* document was created by Norwick Center for Digital Services (nCDS) staff at Southern Methodist University Libraries (SMU Libraries). This document provides nCDS's guidelines for creating and cataloging Digital Collections, hosted in CONTENTdm, using customized fields based on and mapped to the Dublin Core Metadata Element Set. The guide explains nCDS's file-naming architecture, which allows SMU Libraries Digital Collections to mirror the structure of the physical collection online and in the digital archive. The cataloging guidelines include the name, description, and cataloging style of each metadata field, as well as its mapping to a Dublin Core element; designation as mandatory, public, and/or searchable; mapping to a MARC 21 Format for Bibliographic Data field; and examples.

The guidelines were designed so that catalogers of all levels can build and catalog digital collections. At the same time, the framework is extensible: Field names may be changed and custom fields added as needed, based on the requirements for each collection and the desired level of cataloging.

We recognize that each digital collection is unique, and the requirements of a particular collection may necessitate the development of metadata guidelines that vary somewhat from those recommended here. However, the goal of the guidelines described in this document is to enhance standardization within and between collections. When deviations from the guidelines are extensive, they are documented in a specialized metadata profile that is included in the project documents for that collection. nCDS works with special collections curators to create the best model for presenting the resources and metadata digitally. Some libraries maintain custom guidelines, as well.

Contact nCDS

- **Cindy Boeke**, Digital Collections Librarian and Assistant Director, nCDS ◆ cboeke@smu.edu
- **James Williamson**, Digital Preservation Librarian, nCDS ◆ jdwilliamson@smu.edu
- **Margaret Cybulski**, Digital Production Librarian, nCDS ◆ mcybulski@ smu.edu

Table of Contents

Chapter 1: Metadata Quick Reference Guide

Note: **Always refer to and follow the guidelines in** *4.2 Style Guidelines for Cataloging* **when creating Digital Collections metadata records.**

M = Mandatory   P = Public   S = Searchable

Metadata Quick Reference Guide					
Field Name	DC Mapping	M	P	S	Description & Examples
					Descriptive Metadata
Title	Title	Y	Y	Y	Name given to the resource by the creator, publisher, or cataloging agency. Titles may be created by the cataloger when necessary using [APA Title Case](#) and enclosed in brackets. Railroad collection items have a specified style, when created by the cataloger. • Symphony No. 3, A Major, Opus 56 • Arapahoe County Map • Freehold (252 feet) Level, looking North. 21st May, 1902. • El Presidente de la Republica a su llegada al campo de la revista. • American Indians: First Families of the Southwest, [Cover] • American Indians: First Families of the Southwest, [Pages 20 and 21] • [La Decena Tragica, Front Cover] • [Black Walnut and Terra-cotta Sculpture, Crucifix, St. Henry's Church, Freeport, Texas, No. 05] • [John Smith Letter to Jane Jones, September 13, 1923] • [Note from Nelle Johnston to W. Ernst Minor, August 18, 1969] • Memorandum to: Callier Center Trustees re: Dedication Ceremonies

Railroad titles:

- [Atlantic Coast, Locomotive 2003]
- [Chicago, Burlington & Quincy, "Missouri" Locomotive and Tender]
- [Northwestern Pacific, NWP 06, Redwood Empire Route]
- [Ferrocarril del Sureste, Pullman Sleeping Car 7813-12, "Tacotalpa"]
- [Southern Railway Depot, Tuscumbia, Alabama]
- [Texas & Pacific Railway, South Mansfield Depot, Mansfield, Louisiana]

Alternative Title	Title-Alternative	N	Y	Y	Alternative name given to the resource by the creator, publisher, or cataloging agency, including translated titles. Alternative titles created by the cataloger are in brackets, except for direct translations. - [Harrison's Landing, Virginia, (Left to Right) Colonel Albert V. Colburn, Colonel Delos B. Sacket, and General John Sedgwick] - [Umbrella Rock at Point Lookout, Tennessee] - Interior of the Veracruz Railroad Station
Creator	Creator	Y	Y	Y	Person or entity primarily responsible for creating the intellectual content of the resource. *Shared Controlled Vocabulary for Creator and Contributor(s)* - Hillyer, H. B. (Hamilton Biscoe), 1835-1903 - Roche, Thomas C., 1826-1895 - Tower, John G. (John Goodwin), 1925-1991 - Barnard, George N., 1819-1902 - Gardner, Alexander, 1821-1882 - Biscoe, Thomas Dwight, 1840-1930 - Unknown
Contributor(s)	Contributor	N	Y	Y	Person or entity whose contribution to the creation of the resource is significant but secondary to that of any person or entity specified in the Creator field, such as publisher, editor, transcriber, annotator. *Shared Controlled Vocabulary for Creator and Contributor(s)*

					▪ E. & H.T. Anthony (Firm) ▪ Underwood & Underwood
Date	Date-Created	Y	Y	Y	Creation date for the original resource from which the digital object was derived or created. ▪ June 29, 1919 ▪ October 1885 ▪ 1906 ▪ ca. 1890 ▪ ca. 1980-1985 ▪ ca. 1920s ▪ no date
Date (ETDF)	Date-Created	Y	Y	Y	Replicate the date field into <u>LOC Extended Date/Time Format</u>. *Shared Controlled Vocabulary* • 1876-09-19 • 2011-06 • 1900 • 2012~ • 1999? • 1809-09-01/1810-10-01 • 192x • 192x/193x • [1918-09-06, 1918-09-18]
Decade	Date-Created	Y	Y	Y	The decade during which the original resource was created. Include no more than two decades. *Shared controlled vocabulary.* ▪ 1910-1919 ▪ 1890-1899; 1900-1909

Part Of	Relation-IsPartOf	Y	Y	Y	The title of the accession to which the original resource belongs, obtained directly from the MARC record. In some cases, it may need to be shortened. Optional: use date from Marc 245 |f field, when available. *Shared controlled vocabulary.* - Alexander Gardner cartes de visite and portraits - Collection of Carleton E. Watkins western stereoscopic views - Destruction of New Laredo Mexico April 24, 1914 - All the western states and territories, from the Alleghanies to the Pacific, and from the Lakes to the Gulf, containing their history from the earliest times …
Series	Relation-IsPartOf	N	Y	Y	The series within a collection to which the resource belongs; a more granular description than the Part Of field. A series may be obtained from the item, from the finding aid, or created by the cataloger. *Shared controlled vocabulary.* - Scenery of the Yellowstone National Park - Broad Panel Views, Yellowstone Park - History of the Indian tribes of North America, Volume 1 - Series 8: Photograph Albums, 1907-1969 - Landscapes, China and India, 'Eves' and Garden, 1937, album - Album 4, Hardinge Bridge Construction, India
Page Number	Relation-HasPart	N	Y	Y	Page number from book or album. Use a sufficient number of digits to ensure sort order. - p. 02 - p. 159

Place	Coverage	N	Y	Y	Geographic location depicted in the item. When known, use city, county, state/territory; use country when not in the United States.

- Dallas, Dallas County, Texas
- Maryland Heights, St. Louis County, Missouri
- New Orleans, Orleans Parish, Louisiana
- Mount Morgan, Queensland, Australia
- Mexico City (Mexico D.F.), Mexico
- Paksey, Bangladesh
- Mexican-American Border Region
- Veracruz, Veracruz state, Mexico

Description	Description	N	Y	Y	An annotation that provides information about the content of a resource and/or explains its part in a large unit or group of items, written using free text. Transcribe from the MARC record 520 field, whenever possible.

- This photograph is part of the Cananea, Mexico collection which includes 21 photographs of Cananea, Mexico, located just across the Arizona border, showing striking miners, armed men, demonstrations, the mine site, and American company employees.
- This photograph is from an album of photographs of the Mount Morgan Mine, showing views of the mines, mining equipment, mining structures, reduction works, workers and town.
- Inside the steam pump room at the water station in Lemberg.
- This 13th edition of the booklet promoting the Fred Harvey Company's Indian Building was most likely distributed to eastbound passengers on the Santa Fe Railway's California Limited train. The illustration in the center is also featured above the arches on the Indian and Mexican Building in Albuquerque, NM. There is no publication date given, but library markings indicate this booklet as published in 1904. Source: Carrie Johnston, English PhD candidate, SMU, 2013.
- In this typewritten speech, Dr. Hyer discusses the role education plays in a democracy to help citizens realize their full potential.

					• The four members of the Beatles interviewed in Dallas, Texas, where they performed at the Dallas Memorial Auditorium. (At desk, left to right) George Harrison, Paul McCartney, John Lennon, Ringo Starr. • Soldiers of the 28th Infantry at Fort Crockett, Galveston, Texas.
Notes	Description	N	Y	Y	Annotations that provide additional information about the attributes of the resource; a less formal description of the item, written using free text and/or sentence fragments. • Title obtained from Library of Congress: http://www.loc.gov/pictures/collection/civwar/item/2006676177/ • Date taken from: http://www.metropostcard.com/publishersd.html Recto: [imprinted] Series 1194 A. A Residence in Dallas, Texas. Davison Brothers. Verso: [imprinted] Davidson Bros.' Real Photographic Series. London & New York. (Printed in England). Davidsons' Quality. • Recto: [handwritten] 51. Verso: [handwritten in red pencil] Haupt [handwritten in pencil] Apparatus for wrecking track used during Civil War and invented by E. C. Smeed … See "Reminiscences of General Herman Haupt," p. 121, 197-203. • Verso: [stamped] Blessing & Brother, Gallery, Main Street, Houston-Texas. • Negative sleeve: [typed] 1491. M. W. Kellogg, at Magnolia Petroleum (for Franklin Industrial Service), 1936. • Notebook 1 has 163 pages. From the collection of Minas del Compromiso de Vetagrande records, 1788-1809. Three notebooks and one folder of 8 loose leaves. Each item also has been digitized as a .pdf. Material is in Spanish. • Title obtained from previous page. Restricted access. • Date refers to date original photograph was taken; copy negative made later. • Recto: The Delineator for March, 1914. Page 3. Women of War In Mexico. By N.C. Adossides. [label underneath illustration] Drawn from Life by George Amy. [text of article not transcribed]. • Date obtained from stamp box. Recto: [imprinted on negative] Planted by Us, Texas Nursery Co 24. •
Language	Language	N	Y	Y	Refer to the language of text of any type using LOC Language Codes. *Shared controlled vocabulary.*

					▪ eng ▪ fra ▪ spa
Related Resources	Relation-References	N	Y	Y	Links to related resources. ▪ MARC record: http://libcat.smu.edu/vwebv/holdingsInfo?bibId=3228961 ▪ MARC record: http://libcat.smu.edu/vwebv/holdingsInfo?bibId=1855495 Finding Aid: http://www.lib.utexas.edu/taro/smu/00092/smu-00092.html ▪ Related stereograph: ag2000_1369_001_casa_r_opt.jpg MARC record: http://libcat.smu.edu/vwebv/holdingsInfo?bibId=316032 ▪ Related postcard: ag2000_1369_002_palacio_r_opt.jpg MARC record: http://libcat.smu.edu/vwebv/holdingsInfo?bibId=4454754
Authorized Subject Terms	Subject	Y	Y	Y	Use prescribed controlled vocabulary (OCLC searchFast) to describe the main subject(s) in the item. Use semi-colons between terms. *Shared Controlled Vocabulary* • Queensland--Mount Morgan; Mines and mineral resources; Mining engineering • Business enterprises; Cities and towns; Office buildings; Adolphus Hotel (Dallas, Tex.) • Railroad bridges--Design and construction; Railroads • Floods; Flood damage; Natural disasters; Railroad bridges; Railroad tracks; Texas & Pacific Railway; Trestles; Texas--Trinity River; 1908 Trinity River Flood • Southern Methodist University; College student newspapers and periodicals; College students • Mexican War, 1846-1848; United States. Army; Chapultepec, Battle of, Mexico City, Mexico, 1847; Quitman, John Anthony, 1798-1858 • Johnson, Lyndon B. (Lyndon Baines), 1908-1973; Democratic Party (U.S.); American presidential elections; Political campaigns; Presidential candidates; Political candidates; Political slogans • Letters

					Link to important terms to use
Keywords	Subject	Y	Y	Y	Words and phrases that describe the resource that are not in the controlled vocabulary. ▪ Confederates; Confederacy; CSA ▪ RPPC; downtown; skyline; Southwestern Life Building; Great Southern Life Building; Praetorian Building ▪ RPPC; T&P; TP ▪ SMU ▪ Mexican-American War; U.S. Army; U.S. Mexico Border ▪ memos **Link to important keywords to use**
Original Media	Format.Me dium	N	Y	Y	The original resource from which the digital resource was derived. There may be two types, the original resource and a digitized version. (This field is used infrequently; preferred field is Physical Description.) ▪ Original resource provided as: 16 mm film ▪ Original resource provided as: 1/2-inch VHS ▪ Original resource provided as: ceramic sculpture ▪ Original resource provided as: printed newsletter
Physical Description	Format	N	Y	Y	Description of the physical characteristics of the original resource: includes carrier type, extent, subunits, other physical details, and dimensions in cm (height x width). ▪ 1 photograph: sixth plate daguerreotype; 7 x 8 cm ▪ 1 photograph: sixth plate tintype, hand-colored; 9 x 8 cm (case) ▪ 1 photographic print: albumen; 20 x 25 cm ▪ 1 photographic print: gelatin silver; 13 x 21 cm ▪ 1 photographic print (postcard): gelatin silver; 9 x 14 cm ▪ 1 photomechanical print (postcard): color; 9 x 14 cm ▪ 1 photomechanical print: color; 28 x 21 cm

				1 photomechanical print (postcard): linen texture, color; 9 x 14 cm 1 photographic print: gelatin silver; 16 x 21 cm on 25 x 33 cm mount 1 photographic print; gelatin silver, part of 1 volume (42 gelatin silver prints); 24 x 29 cm on 30 x 41 cm mount 1 slide: color; 35 mm 1 volume (104 albumen prints); 27 x 40 cm 1 album cover: part of 1 volume (75 gelatin silver prints); 31 x 42 cm 1 photographic print on stereo card: stereograph, albumen; 9 x 18 cm 1 technical drawing: blueprint; 51 x 78 cm 1 film reel (22 minutes, 07 seconds): 4:3, magnetic sound, color, 24 fps; 16 mm 10 sheets; 36 x 22 cm 30 x 24 inches 1 drawing: 59 x 37 cm 1 object: button; 2.1 cm 4 sheets; 28 cm
Form/Genre	Format-Medium	Y	Y Y	Categorization of the original resource based on characteristics such as its function, intended purpose, method of representation, or type of content. Use the TGM II controlled vocabulary. *Shared controlled vocabulary.* - Photographs; Photographic prints; Photograph albums; Albumen prints - Photographs; Photographic prints; Portraits; Portrait photographs; Card photographs; Cartes de visite - Photographs; Photographic prints; Real photographic postcards; Gelatin silver prints - Photographs; Ambrotypes; Portraits; Portrait photographs; Photograph cases - Photograph albums; Photograph album covers; Photographs; Photographic prints; Gelatin silver prints - Drawings; Pencil works; Metalwork - Slides; Bronze; Metals; Metalwork; Sculpture - Motion pictures; Video recordings - Sound recordings; Concerts - Design drawings; Contract drawings; Proposed works - Badges; Memorabilia

Railway Identifier	Description	N	Y	Y	Free-text field used to describe the railroad's short line nickname or the nickname of the car. ▪ Sunset Limited ▪ Guthrie & Company ▪ Villa del Mar ▪ Cusi ▪ Felipe Carrillo Puerto
Locomotive/ Car Number	Description	N	Y	Y	The locomotive or car number. ▪ Locomotive 2003 ▪ Locomotive 122 ▪ Car 6 ▪ Car 3627
Railway Line	Description	N	Y	Y	Name of the railway company. *Controlled vocabulary.* ▪ Atlantic Coast Line Railroad Company ▪ St. Louis & San Francisco Railway Company ▪ International & Great Northern Railroad ▪ Alabama & Vicksburg Railway ▪ Chicago & North Western Railway Company ▪ Ferrocarriles Nacionales de Mexico ▪ Ferrocarril Chihuahua al Pacifico ▪ Gobierno Federal Mexicano
					Technical Metadata
Digital Resource Type	Type	Y	Y	Y	Categorization of the digitized resource based on the type of object it is. ▪ Image ▪ Text

					▪ Video ▪ Audio ▪ Printed music
Digitization Date	Date-Issued	Y	Y	N	Year in which the digital resource was created. ▪ Digitized: 2015 ▪ Digitized: 2017
Digital Format	Format-HasFormatOf	Y	Y	N	Basic characteristics such as file size, dimensions, duration, etc., of the derivative file uploaded to CONTENTdm or into SoundCloud or Vimeo. When referring to file types, use period followed by file extension. ▪ Displayed as .jp2; uploaded as .jpg ▪ Displayed as .pdf; 3 pages, 1.5 MB ▪ Displayed as .mov streaming file embedded in .html page ▪ TRT 00:10:08.30; Streaming File: Presented in Vimeo as 640 x 480 ▪ Displayed as .mp3 streaming file embedded in .html page; TRT (Track 1) 00:12:36, 192 kbps, MPEG Layer 3 Audio, 17.3 MB; TRT (Track 2) 00:36:57, 192 kbps, 50.7MB; Streaming file presented in Soundcloud ▪ Displayed as .mov streaming file embedded in .html page; TRT: 00:22:07; MPEG-4 AVC, H.264, Quicktime; Aspect Ratio: 16:9, pillarbox; Resolution: 1920 x 1080; Frame rate: 23.98 fps; Audio: Mono, PCM, 48 khz, 16 bps; 3.25 GB; Presented in Vimeo as 960 x 540 streaming file: https://vimeo.com/160244484
Archival File Resolution	Format-HasFormatOf	N	Y	Y	The pixel array, bit depth information, and color space of the archival file (width x height). ▪ Archival scan: 6400 w x 4800 h pixels, 48-bit RGB ▪ Archival scan: 3018 w x 4903 h pixels, 48-bit RGB (recto); 3020 w x 4900 h pixels, 48-bit RGB (verso) ▪ Archival file: 5616 w x 3744 h pixels
Digitization Process	Format-HasFormatOf	Y	Y	N	The technical information about the hardware, software, and processes used to create the archival and upload files. *For flatbed scanning*

- Digitization process: Master scanned using Epson V750 Pro as 600 ppi, 48-bit, RGB .tif; derivative resampled as 3000 w pixels, 24-bit .jpg
- Digitization process: Master scanned using Epson V750 Pro as 1200 ppi, 48-bit, RGB .tif; service master color corrected and cropped; derivative resampled as 3000 w pixels, 24-bit .jpg
- Digitization process: Recto and verso each scanned using Epson V750 Pro as 600 ppi, 48-bit, RGB .tif; recto and verso files combined to make composite derivative and resampled as 3000 w pixels, 24-bit, RGB .jpg
- Digitization process: Master scanned using an Epson 750 as 1200 ppi, 48-bit, RGB .tif; service master changed to black and white, hues and contrast adjusted, and cropped; derivative resampled to 3000 w pixels, 24-bit .jpg
- Digitization process: Master scanned using Epson V750 Pro as 600 ppi, 48-bit, RGB .tif; derivative resampled as 3000 pixels on the long edge, 24-bit .jpg
- Digitization process: Scanned using an Epson 750 as 1200 ppi, 48-bit, RGB, .tif; service master adjusted and cropped; derivative resampled to 3000 pixels on the long edge, 24-bit .jpg

For .pdf files

- Digitization process: Pages scanned as 600 ppi, 48-bits per channel, RGB .tif files; .pdf created and compressed in Adobe Acrobat; 3 pages, 1.5 MB
- Digitization process: Archival photographs of each page created at 16352 w x 12264 h pixels; pages cropped and resized in Photoshop; .pdf created and optimized in Acrobat with .jpg derivatives; 32 pages, 19.6 MB

For Bookeye scanner

- Digitization process: Master scanned using Bookeye scanner as 9071 w x 7370 h pixels, 24-bit, RGB .tif; scan cropped to a 5000 w x 3000 h pixels, 24-bit, RGB .tif; master file cropped and resampled as 3000 w pixels, 24-bit, RGB .jpg
- Digitization process: Scanned with Bookeye scanner, master file cropped to 4280 w x 5702 h pixels and saved as 380 ppi, 16-bit .tif; derivative resized to 3000 w pixels and resaved as 8-bit .jpg

For digital photography

- Digitization process: Photographed using a Hasselblad H4D-200MS as 48-bit, RGB, .tif file; derivative cropped and resampled to 3000 pixels on the long edge, 24-bit .jpg

For digital audio/video recordings

- Digitization process: Received as 16 mm film; transferred to DV format using telecine; web file compressed in Quicktime Pro using AAC Stereo and h.264 (768 kbps), saved as MPEG-4
- Digitization process: Digital master video file created from original media as 24p capture from HD camera with direct, line level audio from magnetic soundtrack. Compressed and edited in Adobe Premiere

Administrative Metadata

Physical Location	Relation-IsPartOf	N	Y	Y	Information concerning box, series, and other details on where the physical item is located.

- Box 3, Folder 21
- Cabinet 1, Drawer 1
- Box 02, Folder 07, Callier Center Dedication

Call Number	Identifier	Y	Y	Y	Call number or accession number of the original resource from which the digital object was derived or created.

Shared controlled vocabulary.

- Ag1982.0231
- E83.89 .M55 1891
- Folio-2 F804.T2 A93
- Broadside KFT1600.5 1836 .A3
- Pamphlet HE2791 .H242 1880
- Mss 0060

Identifier	Identifier	N	Y	Y	Reserved for special identifying information (e.g., ISBN, file name, character string, reference URL; or derived sequence for sorting). • om_01_06_om_2013_1 • bowling_mason_dma
Upload File Name	Identifier	Y	Y	Y	Name of the file uploaded to CONTENTdm, including the three-letter file extension. Exception: .html ▪ ag2005_0001_01_brackettville_001c_opt.jpg ▪ ephemera_c920_opt.pdf ▪ ag1986_0583_04_opt.jpg ▪ ag2005_0004_04_seward_opt.jpg ▪ ag2001_136_01_r_opt.jpg ▪ http://digitalcollections.smu.edu/all/cul/ttb/stream/ttb_13_stream.html
Archival File Name(s)	Relation-IsVersionOf	Y	Y	Y	Name of master file(s) from which the upload derivative was derived, including three-letter file extension. ▪ ag1983_0282_01.tif ▪ ag1983_0282_01.tif; ag1983_0282_01_sm.tif ▪ ag1982_0122x_35.CR2; ag1982_0122x_35_sm.tif ▪ ag2001_136_01_r.tif; ag2001_136_01_v.tif ▪ ttb_13_miracleinharlem_up.mp4 ▪ folio_hc131_a15_1855_1857_v1_000a.CR2 - folio_hc131_a15_1855_1857_v1_346.CR2; folio_hc131_a15_1855_1857_v1.pdf
Digital Collection	Relation-IsPartOf	Y	Y	Y	The name of the digital collection to which the item belongs. *Shared controlled vocabulary.* ▪ Texas Artists: Paintings, Sculpture, and Works on Paper ▪ JCPenney Dynamo Newsletters ▪ Tyler, Texas Black Film Collection ▪ Hervey A. Priddy Collection of American Presidential and Political Memorabilia ▪ George W. Cook Dallas/Texas Image Collection

					▪ Mexico: Photographs, Manuscripts, and Imprints ▪ Potter Art Iron Studios Collection
Library	Publisher	Y	Y	Y	The library or office to which the original resource belongs. *Shared controlled vocabulary.* ▪ Bywaters Special Collections; Hamon Arts Library ▪ G. William Jones Film and Video Collection; Hamon Arts Library ▪ DeGolyer Library ▪ SMU Archives ▪ Edwin J. Foscue Map Library ▪ Fort Burgwin Library (SMU-in-Taos) ▪ Government Information Resources ▪ Hamon Arts Library
Publisher	Publisher	Y	Y	Y	An entity or entities responsible for the digital publication of the item. ▪ Central University Libraries, Southern Methodist University
Rights	Rights	Y	Y	N	A rights management statement that contains information concerning accessibility, reproduction of images, copyright holder, restrictions, securing permissions for use of text or images, etc. These are core examples, but the contact information needs to be customized depending on the library. ▪ *Statement 1* Please cite DeGolyer Library, Southern Methodist University when using this file. A high-resolution version of this file may be obtained for a fee. For details see the https://sites.smu.edu/cul/degolyer/research/permissions/ web page. For other information, contact degolyer@smu.edu. ▪ *Statement 2* This item may be protected by copyright law. Please cite Bywaters Special Collections, Southern Methodist University when using this file. For more information contact bywatersspecialcollections@smu.edu.

	▪ *Statement 3*			
	This item is protected by copyright law. Please cite Bywaters Special Collections, Southern Methodist University when using this file. For more information contact bywatersspecialcollections@smu.edu.			
Tags	None	Y N Y	This is a hidden searchable field. *Shared controlled vocabulary.* ▪ cul_september_2012; John_M; Carol_M ▪ cul_march_2013; compound_object; John_M ▪ cul_november_2015; john_m; margaret_c_cat ▪ cul_december_2015; john_m; Eldric_B		

Chapter 2: Creating Digital Images

2.1 Digital Image File Formats

Three main types of files are used in nCDS image digitization projects:

- A *master* is a high-quality, unaltered, digitized file.

  All master image files are saved in either the .tif (Tagged Image File Format) or the .CR2 (Canon Raw Image) format. A-V master file formats may differ.

- A *service master* is an optimized copy of the master scan or media file that retains the quality and resolution of the master file. The service master is saved separately from the master file.

  All service master image files are saved in the .tif format.

- A *derivative* is created from the master, the service master, or another derivative and is optimized to meet the requirements of its intended end use.

  All files that are uploaded to CONTENTdm are derivatives. *Upload image derivatives* are always saved in the .jpg (Joint Photographic Experts Group) format. For documents, master .tif, service master .tif or derivative .jpg files may be merged into a .pdf (Portable Document Format) file that is optimized for upload, i.e. less than 20 MB. A-V files are compressed and uploaded into Vimeo or Sound Cloud. The embed code is placed in a simple .html file, which is uploaded into CONTENTdm for display.

2.2 Digital File Optimization

Optimizations must be made in consultation with the collection curator or nCDS director.

Any optimizations must be noted in the Digitization Process metadata field for the image.

If the master file does not require optimization, the creation of a service master is unnecessary.

Optimization of a derivative image file can include alterations such as straightening, rotating, cropping, sharpening, resizing, and/or reformatting. All upload image derivatives are resized to 3000 pixels on the long edge and saved as .jpg files. Exception: For items that may be under copyright, but are not being uploaded with restricted access, upload an image derivative that is 750 pixels on the long edge

If an image requires *only* cropping and resizing, a derivative can be made from the master file without requiring the creation of a service master.

A service master is created when an image requires more advanced alterations such as color and/or exposure correction, straightening, rotating, cropping, and sharpening. In these cases, the derivative is made from the service master.

2.3   Naming Digital Files

Appropriate nCDS staff members will work with each collection curator to adopt an existing file-naming scheme or to develop a new file-naming scheme for collections that have not already been digitized.

For new digital collections, we recommend the adoption of a descriptive file-naming scheme.

The overall goal of file naming is to allow the items to sort in a pre-determined sequential order. Typically, the upload file name is used as the sort mechanism in the digital collection.

It is crucial to examine each accession before digitization and determine the desired overall sort order. Even if only a few items from the collection are being digitized, as in the case of a reproduction order, the file-naming scheme should be designed to produce the desired sort order for the collection as a whole.

When the sort order is complex, create a .txt file for the accession that documents the information to be included in the file name, so others can understand and follow that order.

In general, file naming is based on the following order: (1) call number; (2) item number; (3) optional descriptor; and (4) file type (extension).

- For the *call number* segment, use lowercase letters and replace periods and spaces with an underscore.
- For the *item number*, use the pagination or series number, if it exists. Alternatively, the negative number or other information can be used as the item number. If there is no order built into the accession, the scan order can be used for numbering purposes.
- Pad item numbers with leading zeros, using only the number of zeros required to accommodate the total number of items. For example, use 00-99 for collections with fewer than 100 items and 000-999 for collections with fewer than 1000 items.
- Use zeros to number covers. For example, the cover of a 25-page album would be numbered 00, with the first page numbered 01, the second page 02, etc.
- File names can be customized to accommodate the need to match numbers with pages. Depending on how the item is paginated, the fronts and backs of pages can be designated with recto and verso (e.g., 01_r and 01_v), or the fronts and backs can be designated with separate numbers (e.g., 01 and 02).
- When the letter *r* is used to specify recto, *v* to indicate verso, or *c* to indicate composite, precede the letter with an underscore. *Note:* The underscore may have been omitted from earlier file names (e.g., ag2005_0003_0021v_7052.tif). Leave existing file names as is.

    Examples:

    - ag2003_0136_01_r.tif
    - ag2003_0136_01_v.tif

- Sometimes it is necessary to build in a series, box, or folder number and/or other sort information such as city or railway line. Typically, place the larger unit number, e.g. series, box, folder, preceded by an underscore before the item number and descriptive information, e.g. negative numbers, railway designators, keywords, after the item number, preceded by an underscore.

    Example:

- The file name ag2000_1341_01_002_ranger.tif denotes call number Ag2000.1341, Box 1, and the second item from Ranger, Texas.

- *Highly preferred:* Add a *descriptor* such as a keyword to the file name.

  ### Examples:

  - The file name ag1985_0342x_01_loco426.tif reflects the locomotive number.
  - The file name ag1982_0232_nwp_0001.tif includes the abbreviation for Northwestern Pacific Railroad (i.e., NWP). (Note: In this case, the railroad line forms part of the sort order.)

- Specialized file names are often requested by individual libraries.
- For DeGolyer Library projects, build physical location keywords into the beginning of the file names, if they exist in the call number of the MARC record. In every case, go by what is on the MARC record for that accession.

  Physical Location Keywords:

  - vault_ag1986_0515x_01_stanton_r.tif
  - ephemera_c920.tif
  - map_g5293_a5_1864_c6
  - vault_folio_g159_p98

- For *service masters*: Append the suffix *_sm* to the file name, directly before the file extension.
- For *optimized CONTENTdm upload derivatives, even if they are only compressed to .jpg format*: Append the suffix *_opt* to the file name, directly before the file extension.

  ### Examples:

  - An accession with the call number Ag2001.0136 includes fewer than 100 items.

- The *master* image file name is: ag2001_0136_01.tif
- The *service master* file name is: ag2001_0136_01_*sm*.tif
- *Derivatives* can then look like:

  ag2001_0136_01_*sm_300ppi*.tif
  (300 ppi derivative, typically used for print publications; made from service master)

  ag2001_0136_01_*opt*.jpg
  (Optimized CONTENTdm upload derivative; made from master)

  ag2001_0136_01_*sm_opt*.jpg
  (Optimized CONTENTdm upload derivative; made from service master)

  ag2001_0136_*opt*.pdf
  (Optimized CONTENTdm upload derivative .pdf comprised of derivative .jpg files that are merged into a single file; .jpg files made from master)

- For large and complicated accessions, please check the project files and/or DAM for a .txt file with specialized file-naming or cataloging instructions. For any accession that already has items digitized, it is mandatory to review the file-names and metadata records for existing items, to maintain consistency. Specialized cataloging instructions include, but are not limited to:

  o Metadata Guidelines for Baldwin Drawings
  o DeGolyer Cataloging Guidelines for Railroad Digitization Projects.docx

2.4   Image Digitization Workflow

Follow the instructions provided in *nCDS Digitization Guidelines and Procedures: Best Practices for Digitization*, http://digitalcollections.smu.edu/all/cul/docs/culdigitizationguidelines.pdf.

Open the raw scan file.

(1) Make a full-resolution service master if optimizations such as color or exposure correction are required.
(2) Derive an optimized (_opt) .jpg file from the service master or archival .tif file.
(3) Save all master scan and service master files in MediaBank in the folder named with the accession number. Include three fields of metadata: identifier (call number); relation (part of); and rights (use generic permissions statement on file for each library).
(4) Save all upload derivative files in the CONTENTdm folder in MediaBank. Place files in the upload derivatives folder for each collection (_UploadDerivatives).

Compound Objects and .pdf Files

- Decisions are made on a case-by-case basis regarding how items that are components of multi-part resources will be displayed in CONTENTdm.

  - The constituent parts of a resource (e.g., the prints that comprise a portfolio) often are displayed as individual items.

  - When it is desirable to present the constituent parts of a resource (e.g., the covers and pages of a photograph album) as a set of related images, the upload derivatives (i.e., .jpg files) can be merged into a *compound object*. Because of their poor display, compound objects should be used rarely. It is preferable to present the items as .pdfs or as individual items within CONTENTdm, linked through controlled terms in metadata fields, including Part of, Series, Related Resources, etc.

  - When it is desirable to display the constituent parts of a resource (e.g., a multi-page document or pamphlet) as a single item, the upload derivative is saved as a .pdf file.

- When creating a .pdf file, follow the instructions provided in the document *General Instructions for Creating a PDF*. The document is located in \DigitalCollections\Documentation\Instructions_for_creating_a_PDF.docx on the project server.
- It is *crucial* for the pagination of a .pdf to *precisely* mirror that of the original resource.
- When a multi-part resource such as a book, album, portfolio, document, or report is digitized, always create a high-resolution archival .pdf file from the master .tif, service master .tif, or upload derivative .jpg files. Discuss the best option with the digitization coordinator.
- Create a low-resolution derivative of the archival .pdf file for upload to CONTENTdm. Ensure that the upload derivative is compressed to 20 MB or less, as larger .pdf files are not displayed inline in the CONTENTdm Item Viewer (i.e., larger files must be opened outside of CONTENTdm).
- If the file cannot be compressed below 20 MB, it needs to embedded in an .html page which is uploaded into CONTENTdm. Discuss this situation with the digital collections librarian.
- If a resource is slated for alternate distribution (e.g., upload to the Internet Archive), it may be necessary to create a third, medium-resolution .pdf.
- Place the high-resolution .pdf in the archive folder for the appropriate collection.
- Place the low-resolution .pdf in the CONTENTdm upload derivatives folder for the appropriate collection.
- Place any medium-resolution .pdf (e.g., Internet Archive) files in the appropriate archive folder.
- A Flipping Book feature in CONTENTdm is available, but it appears to compress and pixelate the images. It is not recommended for use at this point.

Chapter 3: Creating Metadata

Once the physical object(s) have been digitized, metadata for each item is created. Metadata initially is entered into a Google Sheet (spreadsheet).

Each digital collection has a basic metadata template that is used to create a spreadsheet for each digitization project that will be uploaded into the collection.

Any necessary changes to metadata fields are made in the project's spreadsheet.

Metadata templates and project spreadsheets are stored on the nCDS Google Drive.

3.1   Naming Metadata Files

3.1.1   Metadata Templates

The file-naming scheme for metadata templates is xxx_template, where *xxx* is the applicable three-letter digital collection designator.

Example:

- The three-character designator for the Robert Yarnall Richie Photograph Collection is *ryr*. The name of the metadata template for the collection is ryr_template.

3.1.2   Project Spreadsheets

Begin a project spreadsheet file name with the applicable three-letter digital collection designator.

When all items digitized for a project belong to a single accession, the preferred spreadsheet naming scheme is xxx_call_number, where *xxx* is the three-letter digital collection designator. For the call number segment, use lowercase letters and replace periods and spaces with an underscore.

Example:

- The call number for *Photographs from Mexico [graphic]* is Ag2000.1367. The accession includes 7 items.
- Digitized images of this accession will be uploaded into the Mexico: Photographs, Manuscripts, and Imprints collection (designator = mex).
- The spreadsheet file name is mex_ag2000_1367.

Optional: Add identifying information (e.g., the range of item numbers included in the spreadsheet) to the file name.

Example:

- The call number for *Robert Yarnall Richie photograph collection [graphic]* is Ag1982.0234. The accession includes approximately 10,000 photographic prints, as well as 45 boxes and 9 file cabinets of other resources.
- For the sake of convenience, each Richie spreadsheet typically contains metadata for approximately 20 items. As this practice results in the creation of numerous Richie spreadsheets, it is necessary to build information that identifies the range of item numbers into these file names.
- A group of digitized images numbered 0160 to 0166 will be uploaded into the Robert Yarnall Richie Photograph Collection (designator = ryr).
- File names for the master images range from ag1982_0234_0160_01_gimbel.tif to ag1982_0234_0166_05_chandler.tif.
- The file name ryr_ag1982_0234_0160-0166 indicates that the spreadsheet contains metadata for images numbered 0160 to 0166.

If the items digitized for a project belong to multiple accessions and therefore have different call numbers, an alternative naming scheme can be devised to identify the spreadsheet content.

3.2   Metadata Creation Workflow

nCDS's digital collection metadata passes through three stages: (1) creation; (2) proofreading; and (3) upload to CONTENTdm. The following procedure is used to help track the assignment and progress of spreadsheets as they move through the various stages:

▪ While creating metadata, catalogers append their initials to the spreadsheet file name, directly before the file extension. Initials are lowercased and enclosed in parentheses.

   Example: eaa_vault_folio_2_ta71_a4_1883_2 (mh)

▪ When metadata creation is finished, catalogers add the term *DONE*, in all caps, after their initials, preceded by one space and followed by the closing parenthesis. The cataloger then notifies the digital collections developer by e-mail that this stage has been completed.

   Example: eaa_vault_folio_2_ta71_a4_1883_2_(mh DONE)

▪ While proofreading, proofreaders add their initials after the term *DONE*, preceded by one space and followed by the closing parenthesis.

   Example: eaa_vault_folio_2_ta71_a4_1883_2_(mh DONE kh)

▪ When proofreading is finished, proofreaders add the term *DONE*, in all caps, after their initials, preceded by one space and followed by the closing parenthesis. The proofreader then notifies the digital collections developer by e-mail that this stage has been completed.

   Example: eaa_vault_folio_2_ta71_a4_1883_2_(mh DONE kh DONE)

After the digital objects and associated metadata are uploaded to CONTENTdm, the uploader is responsible for finishing each of the following steps.

◆ 1) Export metadata and delete oldest copy of the metadata export in the projects folder.
◆ 2) Upload CONTENTdm derivatives into MediaBank and make sure the upload is successful.
◆ 3) Delete CONTENTdm derivatives and related folder(s) from the digitization projects folder.

- 4) Delete the metadata spreadsheet from Google Drive. Note: Deleted spreadsheets are stored indefinitely in the Trash folder, which is never emptied.
- 5) Fill in last column in green with date in the nCDS projects spreadsheet.
- 6) Delete files from workstation(s).
- If you do not delete a spreadsheet or folder for a specific reason, please append that spreadsheet or folder nam, e.g. xxxxx_NEEDS_DAM, xxxxxx_CB_NEEDS_FOR_REFERENCE, etc.
- Send email to the digital collections librarian, digital production librarian, and digitization coordinator that the digitization project has been uploaded and related files can be cleared from all workstations. Use the phrase [spreadsheet file name] has been uploaded in the subject line.
- Be sure to identify that the project has been uploaded, including the name of the spreadsheet.
- Provide a link to the items by using the call number and month tags.
- Confirm that the previous steps have been completed by writing "all 6 steps related to upload have been completed".
- Include a short description for the monthly report.
- Copy the MARC cataloger if it is a new accession and indicate it needs a link to the digitized items from the MARC record.

Chapter 4:   CUL Digital Collections Cataloging

4.1   General Guidelines for Cataloging

Many SMU Libraries Digital Collections follow the cataloging guidelines listed below. Not all collections contain all metadata fields, and some customizations exist. Some legacy and earlier collections contain separate metadata profiles in their project files, located on the project server.

Mandatory CONTENTdm metadata fields *must* be used.

Non-mandatory fields may be used in total or in part.

Field names may be changed in consultation with curators and nCDS librarians.

New fields may be added in consultation with curators and nCDS librarians.

The order of the fields may be changed.

nCDS staff will work with collection holders to develop a unique file-naming scheme and digital archive for each collection.

It is recommended that the metadata be viewed as exported standard Dublin Core XML (or any other export format) early in a project. Due to the vagaries of metadata exporting, multiple custom fields often are mapped to a single Dublin Core element. When CONTENTdm metadata is exported, for example, the content of all fields mapped to a specific Dublin Core element is placed in a single field, potentially making the metadata unintelligible. Punctuation or labels such as *Digitization process:* may need to be added for clarity.

It is *extremely* important to maintain consistency throughout the collection. Consistency is essential to achieving the best possible search results and metadata display. Please contact nCDS for help in developing consistent style and content conventions.

Dublin Core does not provide the strict style framework prescribed by RDA. Style guidelines are always under development. Please contact nCDS to share your suggestions.

4.2   Style Guidelines for Cataloging

4.2.1   General Style Guidelines

Do not use special characters, including diacritics, as CONTENTdm often does not display them correctly and/or they get transformed during metadata export. Characters on the top row of the QUERTY keyboard (e.g., @, #, &), however, *may* be used.

Do not use quotation marks, as CONTENTdm turns them into a double set of quotation marks. Use two apostrophes in place of a quotation mark.

Do not begin a metadata field with an apostrophe or a "quotation mark" (two apostrophes), unless it is a crucial part of the title, due to formatting issues in CONTENTdm, which sometimes omit one or more of the leading apostrophes. Check the item once it is online to see how it displays. The incorrect display, e.g., one opening apostrophe when two have been used, may be fixed with CONTENTdm. Avoid using quotation marks in general whenever possible.

Do not place any mark of punctuation directly after a URL, as doing so causes CONTENTdm to break the hyperlink. Separate a URL from any text that follows with two blank spaces ( ).

Do not use italics.

Do not use paragraph breaks or tabs.

Use a single hyphen in place of a dash. The general style is to use single spaces around the hyphens, since the CONTENTdm search will not be able to find the terms otherwise.

Unless their use is specified in the style guidelines, avoid using semicolons whenever possible.

If the accuracy of all or part of the information entered in a field that is not based on a controlled vocabulary is uncertain, follow the last word with one space and a square bracket-enclosed question mark ([?]). An exception to

this guideline is made for titles that are enclosed in square brackets (i.e., cataloger-created titles). In the case of a bracketed title, place a space, question mark between the last word of the title and the closing bracket (?]).

Examples:

- Dallas, Dallas County, Texas [?]
- [P. L. Montangue Standing in Front of House ?]

Be on the lookout for British and historical spellings and punctuation. *These are not errors.* Rather, they are an alternative way of expressing the English language. They should be transcribed as written and do not require the use of the term *[sic]*. Common examples include:

- Colour *(for color)*
- Practise *(for practice)*
- Canon or cañon *(for canyon)*

Use one space, not two, between sentences and after a colon.

Use one space between the initials in a name *unless* the initials are used alone. In the Creator, Contributor(s), Notes, and Keywords fields, exceptions to this guideline are made for LOC Name Authority headings (e.g., corporate name headings such as *E. & H.T. Anthony*) and for text that is transcribed directly from a resource.

Examples:

- T. C. Roche
- Waite, C. B. (Charles Burlingame)
- R. M. & J. B. Linn
- LBJ
- J.F.K.

Use the Oxford (serial or series) comma (i.e., "When a conjunction joins the last two elements in a series of three or more [items], a comma . . . should appear before the conjunction."). An exception to this guideline is made for titles and text that are transcribed directly from a resource (see guidelines in 5.1 and 5.12).

Example: Europe, Asia, and Australia.

Place periods and commas *inside* closing quotation marks. Place semicolons and colons *outside* closing quotation marks. Place question marks and exclamation points *outside* closing quotation marks *unless* they are part of the quoted material.

Use a mark of omission (i.e., three consecutive periods) in place of ellipsis points (i.e., three spaced periods) to indicate that a word, phrase, paragraph, etc., has been omitted from text. Add one space before and after the periods (…). Use only three periods (the three-dot method), regardless of where the omission occurs (e.g., in the middle of a sentence or between sentences).

Example: The choice … typically is made by the publisher.

Format titles in APA title case using this web tool: http://titlecase.com/). An exception to this guideline is made for titles that are transcribed directly from a resource (see guidelines in 5.1).

Separate a title and subtitle(s) with commas when adding missing punctuation.

When books are mentioned in *text*, capitalize an initial *the* in the title.

When periodicals and American newspapers are mentioned in *text*, capitalize an initial *the* in the name of the publication if it is an official part of the publication's name.

Example: The column is published daily in The New York Times. *(The official name is The New York Times.)*

4.2.2 Style Guidelines for Source Citations

Always cite sources.

We use a truncated citation style in the Notes field (see below) to allow users to quickly find sources, and for catalogers to know where information was obtained, e.g., Title, Creator, Date, Place, etc.

When used in the Description field, place source citations after the body of text in the Description field (i.e., not immediately after the information to which it applies). *Do not* place citations in the Related Resources field.

Precede one citation with the term *Source:* and two or more citations with the term *Sources:*

Separate the elements of a citation with a comma, space (,).

End source citations with a period, *unless* the last element is a URL (see guidelines in 4.2.3, "About URLs").

When citing two or more sources, separate citations with a period, space (.), *unless* the last element of a citation is a URL (see guidelines in 4.2.3, "About URLs").

Arrange two or more citations in order of importance (i.e., most important first, etc.).

Do not enclose the titles of articles, chapters, and other short works in quotation marks. Capitalize the title of a web site, but do not enclose it in quotation marks.

Use the form of an author's name that appears in the source. Give names in normal order (i.e., First Name Last Name.

Examples:

- Eric Steinfeldt
- G. William Jones
- George Albert Converse

Format titles using APA title case using this web tool: http://titlecase.com/.)

In *citations*, include an initial *the* in the title if it is an official part of the publication's name.

> **Example:** Full Round of Activities Is Scheduled in Newport, The New York Times, June 8, 1966.

Use Arabic numerals for the volume number of a journal. Precede the number with the term *Volume*.

> **Example:** Volume 38

Precede the issue number of a journal with the term *Number.*

> **Example:** Number 3

Provide pertinent page numbers when citing quoted or paraphrased material. Give the beginning and ending page numbers of journal and magazine articles. In other cases, page numbers may be included at the discretion of the cataloger.

Precede page numbers with the term *page* or *pages.* When giving a range of page numbers, separate the numbers with a hyphen.

> **Example:** pages 5-12

Format the date of a newspaper or magazine article as: Month dd, yyyy. Spell out (i.e., do not abbreviate) the month name.

> **Example:** March 2, 2013

Omit any citation element that is not applicable to the source or for which information is not available.

4.2.3 Format and Content of Source Citations

Printed Book

- *One author:* Author (First Name Last Name), Book Title, (Publisher, Date), page.

- *Two authors:* Author1 and Author2, Book Title, (Publisher, Date), page.
- *Three or more authors:* Author1 et al, Book Title, (Publisher, Date), page.
- *Example:* Bruce A. Bleakley, Dallas Aviation (Arcadia, 2011), page 23.

Book Published Online (see "About URLs" below)

- *One author:* Author (First Name Last Name), Book Title, (Publisher, Date), page, URL
- *Multiple authors:* Follow format for printed books.

Printed Journal Article

- *One author:* Author (First Name Last Name), Article Title, Journal Title, Volume Number, Issue Number, Date, page.
- *Multiple authors:* Follow format for printed books.

Journal Article Published Online

- *One author:* Author (First Name Last Name), Article Title, Journal Title, Volume Number, Issue Number, Date, page, URL
- *Multiple authors:* Follow format for printed books.

Printed Magazine or Newspaper Article

- *One author:* Author (First Name Last Name), Article Title, Publication Title, Date, page.
- *Multiple authors:* Follow format for printed books.

Magazine or Newspaper Article Published Online (see "About URLs" below)

- *One author:* Author (First Name Last Name), Article Title, Publication Title, Date, page, URL
- *Multiple authors:* Follow format for printed books.

Website Content (see "About URLs" below)

- *One author:* Author (First Name Last Name), Article Title, Website Name, Date of Article (do not include date viewed), URL
- *Multiple authors:* Follow format for printed books.

Short Citations for Notes

- As the first Note in the Notes field, put a short citation for information obtained in cataloging. Briefly describe how the information was obtained, and put a URL when possible. As mentioned above, do not add a period after a URL, but use two blank spaces.
- Examples:
  - Date obtained from stampbox.
  - Creator obtained from http://www.loc.gov/pictures/collection/det/item/det1994024766/PP/
  - Date obtained from http://www.loc.gov/pictures/item/99615950/

About URLs

- *Do not* place any mark of punctuation directly after a URL, as doing so causes CONTENTdm to break the hyperlink.
- Use two spaces between citations when the first one ends in a URL.
- Do not include a URL if the source is a subscriber database.
- Do not include a URL if it is extremely long.

Chapter 5: Descriptive Metadata

Note: **Always refer to and follow the guidelines in 4.2, "Style Guidelines for Cataloging," when creating a SMU Libraries Digital Collections metadata record.**

5.1 Title

Dublin Core Element: Title
Mandatory: Yes
Public: Yes
Searchable: Yes
MARC Field: 245

Description:

Name given to the resource by the creator or publisher or cataloging agency. Titles may be created by the cataloger when necessary.

Style:

Always use the title given in a MARC record if it is available. Make sure the title matches the MARC record precisely, even if something different is written on the item that may be transcribed as title. If the MARC record title is cataloger-generated, transcribe it as is, but use brackets and the APA title case using this web tool: http://titlecase.com/.

The preferred source of information for published resources is either the title page or the cover. The preferred source of information for graphic materials is the resource itself, including captions, permanently-affixed labels, handwritten notes, and containers such as negative sleeves. Give preference to a source in which information is formally presented.

If formally-presented information is not available, give preference to a note written in period script as the source of an original title. If the content of such a note is known to be incorrect, use the information as is and enter an explanatory note in the Notes field. In addition, formulate an alternative title based on accurate information (see guidelines in 5.2).

A note written in non-period script may be used as the basis for an original title if the information it contains is known to be accurate. If the content of such a note cannot be confirmed, use the information as is or as the basis for a cataloger-created title and enclose it in square brackets (see guidelines below in "When Creating a Title"). If the content of such a note is known to be incorrect, formulate a title based on accurate information and enclose it in square brackets (see guidelines below in "When Creating a Title").

Transcribe the title of the original resource *exactly* as to wording, order, spelling, punctuation, and capitalization, *except* when words are in all caps. If the entire title is written in all caps, transcribe using APA title case using this web tool: http://titlecase.com/. In the case of an isolated word(s) in all caps, transcribe using APA title style. Acronyms and initialisms remain in all caps. End the title with a period if a period is used in the source.

On a case-by-case basis, you may need to add punctuation, such as commas or periods, when including disparate pieces of information or to set off locations, e.g. city, state, or to separate dates. Often, such punctuation is implied on the item by placing the information on separate lines or in disparate sections. Examples: El Mundo Ilustrado Mexico, 7 de Abril de 1907 becomes El Mundo Ilustrado, Mexico, 7 de Abril de 1907 (comma added before the word Mexico), or Weighing Cotton Leonard Tex. Becomes Weighing Cotton, Leonard, Tex. For dates, South Congress from Bridge 6-15-35 would become South Congress from Bridge, 6-15-35.

When transcribing a misspelled word from a resource, add the term *[sic]* directly after the word to indicate that the misspelling is not a cataloging error. Do not use *[sic]* for British spellings or geographical terms that were considered accurate at the time the piece was created.

If the title is extremely long, extract a shortened version. Transcribe the full title in the Notes field, preceded by the phrase *The full title for the item is …*

Do not include negative numbers in the title. Include dates and places if you believe they are intended to be part of the title; otherwise, enter such information in its assigned field.

If an item does not have an original title, formulate a title that describes the resource and enclose it in square brackets.

Unless absolutely necessary, do not begin a title with quotation marks or apostrophes. These often do not display at all or correctly in CONTENTdm. If you must use quotation marks, i.e., they are part of the title you are transcribing, use double apostrophes due to the technical display issue of quotation marks in CONTENTdm and check the item when it is uploaded to verify they display. If only the closing apostrophes display, you will need to fix it in CONTENTdm.

5.1.1   When Creating a Title

Use APA title case using this web tool: http://titlecase.com/. *Note:* AACR2 style may have been followed in earlier records. Leave titles in existing records as is.

Less is more! Keep titles short and concise when you create them.

Example: [Woman with Pencil and Notebook] NOT [Woman with Pencil and Booklet, Facing Front]

Use commas instead of prepositions

Example: [Concession Tent and Employees, State Fair of Texas] NOT [Concession Tent at the State Fair of Texas]

Avoid beginning a title with an article (i.e., a, an, the) whenever possible.

Do not end a title with a period when you create the title.

Strive to use titles that are not identical. Add the date or a short descriptive phrase to differentiate titles that would otherwise be identical. Use a number sequence ONLY when the items are collocated as a sequential group of photographs, negatives, or documents.

- [Beatles Press Conference, Dallas, 1964, No. 01]
- [Beatles Press Conference, Dallas, 1964, No. 02]

Spell out the word *and* rather than using an ampersand when creating a title. An exception is allowed for railroad titles created by a cataloger where the ampersand may be preferred, i.e. in the name of a railway line.

When a formulated title includes a corporate name that contains a word such as *Company*, *Corporation*, or *Incorporated*, use the standard abbreviation of the term (e.g., Co., Corp., Inc.) in the title. Enter the LC authorized heading, if available, in the Authorized Subject Terms field. If an authorized name is not available, suggest a term in the Local Name Authorities spreadsheets by providing the fullest form of the corporate name available. For example, use *Bethlehem Steel Co.* in the title and enter *Bethlehem Steel Company* to be approved in the Local Name Authorities spreadsheet field. In addition, enter notable variations of the corporate name in the ASH or Keywords field. For example, for a title that contains *Humble Oil and Refining Co.*, enter *Humble Oil & Refining Company (Incorporated in Tex.); Exxon Mobil Corporation* in the Authorized Subject Terms field.

Remember that items may be viewed in alphabetical order. Consider the effect that the formulation of the title will have on the presentation of search results. Begin the title with a descriptive term that is likely to be used as a search term (e.g., Brooklyn Bridge: View from Across the River, rather than View of Brooklyn Bridge from Across the River).

Examples:

- Symphony No. 3, A Major, Opus 56
- Arapahoe County Map
- [Cowboys in Front of Small House with Thatch Roof on Ranch]
- El Presidente de la Republica a su llegada al campo de la revisita.
- Crowd Watching Flood, Dallas, Texas
- Gezicht op het aanlegemplacement Cheribon
- [Railroad Bridge and Tracks]
- [Male Students, Metropolitan Business College, Dallas, Texas]

See "DeGolyer Library Railroad Collection Titles" (below) for additional guidelines specific to creating titles for DeGolyer Library railroad collection resources.

Optional: For untitled pages of multi-part resources (e.g., books, albums, multi-page documents), create a title using the following format: Title of Resource, [Page xx] (substitute a term such as *Cover*, *Inside Cover*, *flyleaf*, etc., for page information when appropriate). If the title ends in a period, omit the comma. Do not enclose this title in square brackets. If a page has an original title (e.g., a titled book illustration), enter the original title in the Title field and enter the formulated title in the Alternative Title field, even if none of the other pages have an original title.

Examples:

- American Indians: First Families of the Southwest, [Cover]
- American Indians: First Families of the Southwest, [Pages 20 and 21]
- [La Decena Tragica, Front Cover]
- The War Between the United States and Mexico Illustrated. [Front Cover]

- *The resource is page 25 of the book* Taos Pueblo. *The original title of page 25 is "III. A Man of Taos."*
  Title field: III. A Man of Taos
  Alternative Title field: Taos Pueblo, [Page 25]

Titling of Correspondence

Use the following format when titling letters, notes, etc.: [First Name, Last Name Letter to First Name, Last Name, Month Day, Year]

- [John Smith Letter to Jane Jones, September 13, 1923]
- [Nelle Johnston Note to W. Ernst Minor, August 18, 1969]

For Memorandum, transcribe information from the To: and Re: lines when it is available.

- Memorandum to: Callier Center Trustees re: Dedication Ceremonies
- Memorandum to Callier Center Trustees

Professional titles of the correspondents are allowable in the Title field only when needed for clarification.

In the Description field, document the professional titles of the correspondents, if they are easily available, and write a brief summary of the subject of the correspondence. Use Correspondence in the Form/Genre field, and Letters as an Authorized Subject Term.

5.1.2 DeGolyer Library Railroad Collection Titles

Railroad photographs

If an item does not have an original title, create a title that includes the railway line, builder, car type, number, and/or route, if known. The spelled-out abbreviation (i.e., not the acronym or initialism) for the railway line should be used.

When both the railway line and the builder are known, use the following sequence: railroad, locomotive number, builder.

The following styles are acceptable: Locomotive No. xx; Locomotive xx; No. xx.

Optional: Create an Alternative Title using this style when the original title does not capture this information adequately.

Information on the sleeve or index card of an item should be re-formatted to include this information.

Examples:

- [Atlantic Coast, Locomotive 2003]
- [Chicago, Burlington & Quincy, "Missouri" Locomotive and Tender]
- [Northwestern Pacific, NWP 06, Redwood Empire Route]
- [Ferrocarril del Sureste, Pullman Sleeping Car 7813-12, "Tacotalpa"]
- [Ferrocarril Mexicano, First Class Car 40]
- [Ferrocarril Mexicano, Dining Car, "Apizaco"]
- [St. Louis & San Francisco, Frisco, Motor Car 2130]
- [International & Great Northern, Locomotive 122 with Tender]
- [Grant Locomotive Works, No. 239]
- [New York Elevated Railroad, No. 54, Rhode Island Locomotive Works]

Depot and station photographs

If an item does not have an original title, create a title that includes the railway line and geographical location, if known. The spelled-out abbreviation (i.e., not the acronym or initialism) for the railway line may be used. Do not abbreviate the geographical location.

Create an Alternative Title (see guidelines in 5.2) using this style when the original title does not capture this information adequately.

Examples:

- [Southern Railway Depot, Tuscumbia, Alabama]
- [Texas & Pacific Railway, South Mansfield Depot, Mansfield, Louisiana]
- [Texas & Pacific Railway Depot, Pleasant Hill, Louisiana]

5.2   Alternative Title

Dublin Core Element: Title
Dublin Core Qualifier: Alternative Title
Mandatory: No
Public: Yes
Searchable: Yes
MARC Field: 246

Description:

Alternative name given to the resource by the creator or publisher or cataloging agency, including translated titles. Alternative titles may be created by the cataloger.

Style:

Most items do not need an alternative title. Use them sparingly to clarify titles originally in other languages or with excessive abbreviations. You don't need to use them if the information will be available in other fields, e.g., Date, Place.

Use same style as Title field.

Enclose cataloger-created Alternative Titles in square brackets.

Put translated titles in brackets. Earlier records that do not use brackets do not need to be changed.

Examples:

- [Harrison's Landing, Virginia, (left to right) Colonel Albert V. Colburn, Colonel Delos B. Sacket, and General John Sedgwick]
     Title: Group, General Sedgewick [sic], Col. Sackett, And Lt. Col. Colborn [sic], Harrison's Landing, August, 1862.
- [Umbrella Rock at Point Lookout, Tennessee]
     Title: Gallery ''Point Lookout,'' Lookout Mountain, Tenn.
- [Interior of the Veracruz Railroad Station] (Direct translation of title)
     Title: Interior de la Estacion del Ferrocarril de Veracruz

---

5.3   Creator

Dublin Core Element: Creator
Mandatory: Yes
Public: Yes
Searchable: Yes
MARC Field: 1XX, 7XX

Description:

Person or entity primarily responsible for creating the intellectual content of the resource. Examples of creators include authors, artists, photographers, etc.

As of late 2015, we switched to an authorized name controlled vocabulary. Creator and Contributor names will go into the same controlled vocabulary.

Do not add roles to creators and contributors unless it is included in the authorized name from the Library of Congress or is needed to clarify similar local names. Do not put [attributed] in the Creator field; this information will be added in a Note (see below).

Use these sources for authorized names in order of preference.

- Library of Congress Name Authorities (LCNAF), also available under http://authorities.loc.gov/

- VIAF: The Virtual International Authority File

- Handbook of Texas

- Getty Thesaurus Union List of Artist Names Online

Photography studios

We will use the authorized name of a person in the Creator field instead of the photography studio when the studio is named after a singular person and we know his or her authorized name.

In instances where a photography studio is named after multiple people and we know their authorized names, place the studio name in the Creator field and include the individual names in the Authorized Subject Terms field.

Style:

Shared controlled vocabulary.

For personal names, use the LOC Name Authority heading, if available. Do not add birth and death dates to the LOC authorized name – copy it precisely.

Use Unknown if the Creator is unknown. Do not leave the field blank.

If an LOC name authority is not available, follow LOC style to create a heading, providing the fullest form available (e.g., last name, first name, middle name/initial, birth and death dates). Submit the original spelling,

i.e., from the item, if it is available and your proposed authorized version of the name in the Local Name Authorities spreadsheet for approval. Add any important notes or URLs in the Notes column.

For corporate names, use the LOC authorized name heading, if available. If not, follow LOC style to create a heading. Submit the original spelling, i.e. from the item, if it is available and your proposed authorized version of the name in the Local Name Authorities spreadsheet for approval. Add any important notes or URLs in the Notes column.

Remember to transcribe alternative spellings, e.g., for photography studios, precisely as they are in the Notes field.

When necessary, you may use alternative spellings if they are commonplace or acronyms, e.g,. for railroads, in the Keywords field.

If a creator's relationship to the resource is attributed but not verified, provide this information in the Notes field, i.e. This photograph is attributed to Matthew Brady.

Separate multiple entries with a semicolon, space (;).

Do not add punctuation to close this field. Use punctuation that is part of an authorized term or part of the name, e.g. initials.

Examples:

- Paxson, Charles
- Roche, Thomas C., 1826-1895
- Tower, John G. (John Goodwin), 1925-1991
- Barnard, George N., 1819-1902
- Biscoe, T. Dwight (1840-1930); Biscoe, Walter S. (1853-1953)
- Unknown

5.4   Contributor(s)

Dublin Core Element: Contributor
Mandatory: No
Public: Yes
Searchable: Yes
MARC Field: 7XX

Description:

Person or entity whose contribution to the creation of the resource is significant but secondary to that of any person or entity specified in the Creator field (e.g., editor, transcriber, publisher).

Style:

Shared controlled vocabulary.

Use the style for cataloging the Creator field.

Leave this field blank if there are no known contributors.

Document the contributor's role, if deemed important, in the Notes field. The MARC Code List for Relators, http://loc.gov/marc/relators/relaterm.html, is a recommended (but not required) source of terms. A list of relationship designators specific to contributors is available in RDA, Appendix I, http://access.rdatoolkit.org/.

Separate multiple entries with a semicolon, space (;).

Do not use closing punctuation in this field, unless it is part of an authorized term.

Examples:

- Fraser, Russell A.
- Weatherington Brothers
- The Texas Nursery Company

5.5   Date

Dublin Core Element: Date
Dublin Core Qualifier: Created
Mandatory: Yes
Public: Yes
Searchable: Yes
MARC Field: 264

Description:

Creation date for the *original* resource from which the digital object was derived or created.

Style:

Always try to find a date or date range for each item, particularly if it is 1923-present. Contact the collection curator with any questions regarding the date of a resource.

Use the fullest date available, spelling out the day and month if it is available.

Do not put spaces between hyphens in a date range.

Use the abbreviation *ca.* for the term *circa.*

Always precede a decade or date range with *ca.*

Express decades as numerals. End decade date ranges with the letter s, e.g., instead of ca 1910-1919, use ca. 1910s.

If no date is known, use the term *no date. Note:* The term *n.d.* may have been used in earlier records. Leave these records as is.

If two dates are applicable, e.g., date photograph or item was created vs. date of publication, use the former.

See **Notes on Documenting Dates** below.

Do not use closing punctuation in this field.

Examples:

- June 29, 1919
- October 1885
- 1906
- ca. 1890
- ca. 1980-1985
- ca. 1920s
- ca. 1918-1920s
- ca. 1860s-1870s
- no date

5.5.1   Notes on Documenting Dates

For dates based on a postmark and for which no other date information is available, use the year of the postmark and add a circa date in the Date field. Add the following note in the Notes field: Date derived from postmark. Transcribe the postmark in the Notes field.

For items with a postmark and other date information that refers to the date of the photograph (i.e. inscription on the negative, date given in accompanying text, etc.), use the earlier date in the Date field.

For items with a postmark and no other date information, but for which the date of the photograph may be found through research, use the date found through research in the Date field. Add a note in the beginning of the Note field as to how the date was determined, e.g. Date obtained from (i.e. history of town, account of event, etc.) [hyperlink, two spaces, no period].

For items with a postage stamp and no other information, use postage stamp as a reference point and check the date range it was in circulation, e.g., 1908-1910. Use this range as a circa date and add a note in the beginning of the Note field that states: Date obtained from stamp. Use similar style for stamp boxes.

For items with a wide date-range from a stamp box (i.e. 1910s-1930s) examine the content of the photograph to narrow the range through research (i.e. signage, clothing style, vehicles, etc.) Add a note in the Notes field only if necessary for clarification.

5.5.2   Copyright Research Based on Dates

Use the following web resource to determine whether an item may be in copyright:
http://copyright.cornell.edu/resources/publicdomain.cfm

Note the difference between Unpublished and Published Works.

If the item is Unpublished for less than 120 years or Published after 1923, use the correct rights statement.

Use the copyright flow chart to document whether the item is a low risk or if it needs to be restricted.

All items that may be under copyright must be resized to 750 pixels on the long edge.

Check with one of the nCDS librarians or the nCDS Director if you have any questions about the copyright status.

5.6   Date (EDTF)

Dublin Core Element: Date
Dublin Core Qualifier: Created
Mandatory: Yes
Public: Yes
Searchable: Yes
MARC Field: 264

Description:

The Extended Date/Time Format (EDTF) replicates the Date, as cataloged above, following LOC's EDTF, to correspond with international standards for cataloging dates and facilitate precise date searching in a linked data environment.

Style:

Shared controlled vocabulary.

Use these guidelines to formulate the date using the EDTF standard:
http://www.loc.gov/standards/datetime/pre-submission.html

Also, for reference:

- ISO 8601

- ISO 8601 Date Range

- ISO 8601 Uncertain/Approximate Dates

Do not use closing punctuation in this field.

Do not spell out dates in the Date (EDTF) field.

Use "~" in place of "ca." Place the symbol after date.

Use "?" to designate an unknown date. Place the symbol after the date.

Use "/" to separate dates in a date range.

Use "x" to replace a questionable date that occurred once during a time period (1920s, etc.)

YYYY

YYYY-MM

YYYY-MM-DD

YYYY-MM-DD/YYYY-MM-DD [closed date range]

/YYYY [open date range, no beginning date known]

YYYY/ [open date range, no ending date known]

With a date range using an "or" date, use square brackets [ ], but when dealing with multiple dates where they're scattered, we use braces { }

Examples:

- 1876-09-19
- 2011-06
- 1900
- 2012~
- 1999?
- 1809-09-01/1810-10-01
- 192x
- 192x/193x

- 186x/1885~ (for ca. 1860s-1885)
- 1885~/1890~ (for ca. 1885-1890)
- 1918-06~ (for ca. June 1918)
- 1925~/1929~ (for ca. 1925-1929)
- [1918-09-06, 1918-09-18] (for September 6 or September 18, 1918)
- {1936, 195x~/198x~} (for Date: 1936 (artwork), ca. 1950s-1980s (slide))

5.7   Decade

Dublin Core Element: Date
Dublin Core Qualifier: Created
Mandatory: Yes
Public: Yes
Searchable: Yes
MARC Field: 264

Description:

The decade during which the original resource was created.

Style:

Shared controlled vocabulary.

Use the format yyy0-yyy9. Separate the years with a hyphen (no spaces before/after the hyphen).

Separate sets of decades with a semicolon, space (;).

Leave this field empty if no date is known.

Leave this field empty if the date range includes more than two decades.

Do not use closing punctuation in this field.

Examples:

- 1900-1909
- 1900-1909; 1910-1919
- 1860-1869

5.8   Part Of

Dublin Core Element: Relation
Dublin Core Qualifier: IsPartOf
Mandatory: Yes, if applicable
Public: Yes
Searchable: Yes
MARC Field: 773

Description:

The formal title of the accession to which the original resource belongs found in the MARC record.

Style:

Shared controlled vocabulary.

Use the title statement that appears in the SMU Library Catalog bibliographic record for the accession. Record the title proper *exactly* as to wording, order, spelling, and capitalization, except for the following two items:

- Omit ISBD-specified spaces such as those that precede a colon.
- Omit any general material designation that appears in the title statement (e.g., [graphic]).

If the title is extremely long, shorten it and use a mark of omission (…) to indicate that part of the title proper has been omitted.

Use this field even for items such as books where the title of the digital resource and the title of the accession are the same, so there will be a controlled term for the resource.

Check with the curator about whether to use the date in the MARC 245 |f field.

When quotation marks are in the mark record, use double apostrophes.

Do not use closing punctuation in this field, unless it is part of the term in the MARC record.

If an authorized term has not previously been created, add it to the controlled vocabulary for the Part Of field in CONTENTdm.

Examples:

- George W. Cook Dallas/Texas image collection
- George Albert Converse papers and photographs, 1861-1897
- Alexander Gardner cartes de visite and portraits
- Collection of Carleton E. Watkins western stereoscopic views
- Destruction of New Laredo Mexico April 24, 1914

- All the western states and territories, from the Alleghanies to the Pacific, and from the Lakes to the Gulf, containing their history from the earliest times …

5.9   Series

Dublin Core Element: Relation
Dublin Core Qualifier: IsPartOf
Mandatory: No
Public: Yes
Searchable: Yes
MARC Field: 773

Description:

A formal or cataloger-derived series that is more granular description than the Part Of field.

Style:

Shared controlled vocabulary.

Transcribe the series title of the original resource *exactly* as to wording, order, spelling, and capitalization, except when words are in all caps. If the entire title is written in all caps, transcribe using APA title case using this web tool: http://titlecase.com/. In the case of isolated word(s) in all caps, transcribe using APA style. Acronyms remain in all caps, with no periods between letters.

Transcribe all punctuation as it appears in the original resource.

Always include series and sub-series titles from finding aids in this field.

Create series titles for discrete sub-units of an accession, e.g. albums, diaries, etc. These do not need to be bracketed.

When creating a series title, use APA title case using this web tool: http://titlecase.com/. *Note:* AACR2 style may have been followed in earlier records. Leave series titles in existing records as is.

One item may belong to multiple series. Separate multiple entries with a semicolon, space (;).

Do not use closing punctuation in this field, unless it is part of the series term.

If an authorized term has not previously been created, add it to the controlled vocabulary for the Series field in CONTENTdm.

Examples:

- Views of Gen'l Crook's expedition and the Black Hills
- Indians of the Colorado Valley.
- Scenery of the Yellowstone National Park
- Broad Panel Views, Yellowstone Park
- Album 3, Hardinge Bridge Construction, India
- Series 3: City views, 1870-1936
- Series 1: Postcards and Small Prints

5.10 Page Number

Dublin Core Element: Source
Mandatory: No
Public: Yes
Searchable: Yes
MARC Field: 300

Description:

Page number from book or album.

Do not create page numbers. Only use them if they are written or imprinted.

Style:

Precede the page number with the term *p.*

Pad page numbers with leading zeros, using only the number of zeros required to accommodate the total number of pages. For example, use 00-99 for a resource with fewer than 100.

Previous use of the field included page numbers based on the numbering in the file name. This practice is no longer in use.

Do not use closing punctuation in this field.

Examples:

- p. 002
- p. 159

5.11 Place

Dublin Core Element: Coverage
Mandatory: No
Public: Yes
Searchable: Yes
MARC Field: 522

Description:

Geographic location depicted in the item. The Getty Thesaurus of Geographic Names Online is the preferred resource.

Style:

Spell out (i.e., do not abbreviate) all place names (e.g., the names of cities, states, countries).

Place field contains information on the place as it is named today.

Go from smaller to larger geographic areas (e.g., City, County, State/Region).

Include the country for locations outside the United States.

Separate areas with a comma, space (,).

Leave blank if the place is unknown.

Put [?] at the end if the place cannot be confirmed. Include multiple places, when necessary, separated by a semi-colon.

For U.S. locations, inclusion of a county is now mandatory. Follow the county name with the term *County*, capitalized and spelled out. For Louisiana, use the term *Parish* in place of *County*.

For cites that comprise multiple counties, and for which you do not know the exact county depicted, use the preferred county as listed in the Getty Thesaurus of Geographic Names.

If you cannot determine the exact, current place, you may use the period place as denoted on the object, i.e. Wyoming Territories; U.S. Mexico Border Region.

For Mexico City, use Mexico City (Mexico D.F.), Mexico

For foreign states that duplicate the name of a city or country, follow the Getty Thesaurus of Geographic Names style, e.g. City, City state, Country.

Records from many older items did not follow the Getty Thesaurus of Geographic Names. These items do not need to be changed.

The following cities must also have North America--Mexican-American Border Region in the Authorized Subject Terms field and U.S. Mexico Border in the Keywords field: Naco; Douglas; Del Rio; Pharr; Tijuana; Matamoros; Brownsville; El Paso; Cuidad Juarez; Nuevo Laredo; Laredo; Piedras Negras; Eagle Pass; Ojinaga/Presidio; Reynosa/ Hidalgo (TX); Columbus, NM; Agua Prieta; Nogales; Mexicali; Tecate; Deming; Harlingen.

Do not use closing punctuation in this field.

Examples:

- Dallas, Dallas County, Texas
- Sherman, Grayson County, Texas
- Mexico [?]
- Maryland Heights, St. Louis County, Missouri
- Philadelphia, Philadelphia County, Pennsylvania
- New Orleans, Orleans Parish, Louisiana
- Mexico City (Mexico D.F.), Mexico
- Veracruz, Veracruz state, Mexico
- Kilgore, Gregg County, Texas [?]; Kilgore, Goliad County, Texas [?]

5.12 Description

Dublin Core Element: Description
Mandatory: No
Public: Yes
Searchable: Yes
MARC Field: 500

Description:

Use this field to include a succinct description of the resource.

Style:

If available, use the Description from the MARC 520 field. You may make slight adaptions, only if necessary, to make sense.

If the MARC 520 is not available or does not pertain to a single item in a large accession, use this field to provide a brief, freely-written description of the item.

You may use full sentences or sentence fragments.

Use this field to place a single page or photograph within the context of a larger set or album.

Cite source(s) for information that is not generally known or easily checked. When creating source citations, follow the guidelines in 3.2.2 and 3.2.3.

Capitalize the first word in this field.

End this field with a period, unless it ends with a URL (see guidelines in 3.2.3, "About URLs").

Examples:

- This photograph is part of the Cananea, Mexico collection that includes 21 photographs of Cananea, Mexico, located just across the Arizona border, showing striking miners, armed men, demonstrations, the mine site, and American company employees.
- Inside the steam pump room at the water station in Lemberg.
- This tintype showing one child held by a "hidden father" or "hidden mother" exemplifies a genre of photography in which an adult is obscured with a blanket or fabric while holding a baby or child from behind or to the side. A frame or matte was then used to crop the image so that only the intended sitter(s) would be in view. Source: [Provide source citation]
- Illustration depicting Uncle Sam seated across a chessboard from a figure representing Mexico. On the chessboard are American soldiers and Mexican soldiers.
- In this typewritten speech, Dr. Hyer discusses the role education plays in a democracy to help citizens realize their full potential.

- The four members of the Beatles interviewed in Dallas, Texas, where they performed at the Dallas Memorial Auditorium. (At desk, left to right) George Harrison, Paul McCartney, John Lennon, Ringo Starr.
- Soldiers of the 28th Infantry at Fort Crockett, Galveston, Texas.

5.13 Notes

Dublin Core Element: Description
Mandatory: No
Public: Yes
Searchable: Yes
MARC Field: 500

Description:

Annotations that provide additional information about the attributes of the resource; a less formal description of the item, written using free text.

Style:

Do not precede information with the term *Note:*

Place notes that are not transcribed from the resource ahead of those that are.

Source where information in this field, such as where Creator, Date, Place, etc., is obtained if it is not found directly from the item. Such notes should be as concise as possible, including only a hyperlink or a shortened citation that includes some or all of (First Name Last Name, Title of Book/Article, hyperlink). You may even use only a hyperlink.

Do not link to eBay or other auction sites where the link will become invalid (note: you can link to Worthpoint, where the links are permanent). Use this phrase or similar wording, depending on the situation: Date obtained from similar photograph found on eBay.

Use a note to explain discrepancies in dates, i.e. if there is a photograph on a postcard that was taken earlier than the postcard was printed, etc.

When transcribing from the resource, spell and punctuate the information *exactly* as it appears on the item. An exception to this guideline is made in cases where punctuation such as commas, periods, etc., are used to improve the readability and/or clarity of the text. For example, always separate the lines of an address (i.e., name, street address, city and state) with a comma, space (,).

Check for Notes in the MARC record and include them whenever possible. Do not edit or change them unless necessary.

When transcribing a misspelled word from a resource, add the term *[sic]* directly after the word to indicate that the misspelling is not a cataloging error. Do not use *[sic]* for British spellings or spellings that were considered correct during the time period the item was created. Put the American or current spelling in an Alternative Title, in the Place field, as an ASH or keyword, etc.

When a large amount of text is present on a resource, use your judgment regarding how much to transcribe. Use a mark of omission (…) to indicate that text has been omitted or add a note that the text is not transcribed.

Transcribe the place of publication from a resource only when it is relevant to or would be helpful in finding and identifying the item. Omit secondary locations named in the imprint, particularly when their inclusion would negatively affect search precision, such as publisher locations in multiple cities.

Always indicate the location on the resource from which information is being transcribed. Use the terms *Recto:* and *Verso:* to denote that information is located on the front or back of an item. Use the term *Negative sleeve:* to denote that information is located on the sleeve of a negative.

Follow the location phrase (e.g., Recto:) with a notation regarding the form of the text (e.g., handwritten, imprinted, stamped). Lowercase the notation and enclose it in square brackets. If relevant, provide additional descriptive information (e.g., handwritten in red ink, handwritten in period script). If you are not sure about the form of the text, omit this information, or check with an nCDS librarian or the curator.

Always transcribe postmarks, when they are legible. Do not transcribe stamps unless they are on a Civil War item (Note: These are tax stamps, not postage stamps. These tax stamps can be used to date an item).

All text in brackets in notes is lower case, even if it forms a sentence, and does not include punctuation.

If access to a resource is restricted, enter the term *Restricted access.* as the last note in the field.

Capitalize the first word in each note, whether or not it is in brackets.

Separate multiple notes (e.g., the recto note and the verso note) with a period, space (.).

Within a note, separate transcriptions of text located in different areas on the item (e.g., text that appears at the top, sides, and bottom of the recto or verso) with commas or a period, space (.).

For quotation marks, use double apostrophes.

Only transcribe period, handwritten notes if they are short and/or important. If you do not transcribe them, put [handwritten note not transcribed].

For large blocks of text not transcribed use this note or a variation, typically at the end of the notes: [descriptive text not transcribed].

End this field with a period.

Useful terms and phrases: recto, verso, negative sleeve, stamped, imprinted, imprinted on negative, caption, handwritten, transcription (see A.1 for definitions).

Examples:

- Title derived from image in Library of Congress, http://www.loc.gov/pictures/collection/civwar/item/2006676177/ Recto: [handwritten] 51. Verso: [handwritten in red pencil] Haupt [handwritten in pencil] Apparatus for wrecking track used during Civil War and invented by E. C. Smeed … See ''Reminiscences of General Herman Haupt,'' p. 121, 197-203.
- Verso: [stamped] Blessing & Brother, Gallery, Main Street, Houston-Texas. Duplicates can be had by sending name and No. of this Card.
- Negative sleeve: [typed] 1491. M. W. Kellogg, at Magnolia Petroleum (for Franklin Industrial Service), 1936.
- Recto: [engraved on negative] Mujeres Listas Para Recivia a Rabago. [inscribed on negative] 1142.
- Notebook 1 has 163 pages. From the collection of Minas del Compromiso de Vetagrande records, 1788-1809. Three notebooks and one folder of 8 loose leaves. Each item also has been digitized as a .pdf. Material is in Spanish.
- Title from previous page. Restricted access.
- Date refers to date original photograph was taken; copy negative made later.
- Recto: The Delineator for March, 1914. Page 3. Women of War In Mexico. By N.C. Adossides. [label underneath illustration] Drawn from Life by George Amy. [text of article not transcribed].
- Date obtained from stamp box. Recto: [imprinted on negative] Planted by Us, Texas Nursery Co 24.
- Recto: [imprinted] Keystone View Company, Manufacturers and Publishers. 10896, Art Creation by the Master's Hand, Acambarro, Mexico. Copyright 1900, by B. L. Singley. Verso: [descriptive text not transcribed].
- Date taken from: http://www.metropostcard.com/publishersd.html Recto: [imprinted] Series 1194 A. A Residence in Dallas, Texas. Davison Brothers. Verso: [imprinted] Davidson Bros.' Real Photographic Series. London & New York. (Printed in England). Davidsons' Quality.

5.14 Language

Dublin Core Element: Language

Mandatory: No
Public: Yes
Searchable: Yes
MARC Field: XXX

Description:

The language of text of any type in an item, e.g., notes, documents, letters, imprints, captions, etc.

Style:

Shared controlled vocabulary.

Use three-letter language code from https://www.loc.gov/standards/iso639-2/php/code_list.php.

Use more than one language code, if necessary. Separate the terms with a semi-colon.

When applicable, use the term designated as "B" (bibliographic), i.e., not the one designated as "T" (terminology).

Examples:

- eng
- fre
- spa

5.15 Related Resources

Dublin Core Element: Relation

Dublin Core Qualifier: References
Mandatory: No
Public: Yes
Searchable: Yes
MARC Field: 787

Description:

A summary of information, citations, and links to related resources.

Style:

Refer to related resources either by title, file name, or by URL.

Enter the URL for the SMU Library Catalog bibliographic record for the accession, if one exists, using the format shown in the example below.

Refer to the finding aid, if one exists.

Do not place any mark of punctuation directly after a URL, as doing so causes CONTENTdm to break the hyperlink. Separate a URL from any text that follows with two spaces ( ).

Use this field to link to related or identical items made from the same negative in SMU Libraries Digital Collections, i.e., Related postcard: (upload derivative file name). Place this information first, i.e. before the MARC record and/or finding aid.

Only refer to related photographs in the Related Resources field if they are identical or printed from the same negative. There may be a few other exceptions. Do not link to multiple items that include the same people, cover the same event, etc. in the Related Resources field. If there are multiple related photographs, you should link to them through a Series term, or the user can find them through the use of Authorized Subject Headings, keywords, etc.

When referring to a similar item do not use the term "duplicate". Use "Print made from the same negative" or "Imprint made from the same negative" or "Related photograph".

Examples:

- MARC record: http://libcat.smu.edu/vwebv/holdingsInfo?bibId=2777978 Finding aid: http://www.lib.utexas.edu/taro/smu/00085/smu-00085.html
- View unlabeled image at: http://digitalcollections.smu.edu/cdm/ref/collection/mav/id/26
- Related stereograph: ag2000_1369_001_casa_r_opt.jpg MARC record: http://libcat.smu.edu/vwebv/holdingsInfo?bibId=316032
- Related postcard: ag2000_1369_002_palacio_r_opt.jpg MARC record: http://libcat.smu.edu/vwebv/holdingsInfo?bibId=4454754

5.16 Authorized Subject Terms

Dublin Core Element: Subject
Mandatory: Yes
Public: Yes
Searchable: Yes
MARC Field: 6XX

Description:

Authorized Subject Terms primarily come from the Library of Congress Subject Headings and Name Authorities, and are used to describe the subject(s) of a resource.

Style:

Shared controlled vocabulary.

Use these sources for authorized subject terms in order of preference.

- Library of Congress Subject Headings (http://fast.oclc.org/searchfast/)
- Art & Architecture Thesaurus (AAT)
- Thesaurus for use in College and University Archives (SAA)

Use SearchFast to search Library of Congress Subject Headings: http://fast.oclc.org/searchfast/

You may use id.loc.gov or http://authorities.loc.gov/ to search LOC Subject Headings.

Include all dashes or information found in parentheses.

The recommended number of subject terms is 3-7. Use *general* terms that exemplify the *most salient* aspects of the resource.

Separate terms with a semicolon, space (;).

Include the LOC name or corporate authority if the person or company is a subject. If an LOC name authority is not available, follow LOC style to create a heading, providing the fullest form available (e.g., last name, first name, middle name/initial, birth and death dates). Submit the original spelling, i.e., from the item, if it is available and your proposed authorized version of the name in the Local Name Authorities spreadsheet for approval. Add any important notes or URLs in the Notes column of the spreadsheet.

If a subject term that will be used multiple times for a specific event or building is not available, create the term and place your proposed authorized version of the name in the Local Subject Authorities spreadsheet for approval. Add any important notes or URLs in the Notes column. Example: 1908 Galveston Flood.

Do not use form/genre terms (e.g., Paintings, Photographs, Portraits, Panoramic views) as subject terms. Instead, enter them in the Form/Genre field.

Use the terms *men*, *women*, and *children* as authorized subject terms *only* for images that are portraits, or where they are the primary focus of the item (see 5.18 for TGM scope notes on the term *Portraits*).

Use free-form terms in the Keywords field. For example, use the authorized name for a railroad and common acronyms that people may use in searching in the keywords field.

Repeat the controlled term that goes into the Railroad Line field as an Authorized Subject Term.

It is *extremely* important to be consistent within a digital collection and between digital collections. Review items already cataloged from the same accession or other accessions that depict similar content, so that similar terms are used.

Do not use closing punctuation in this field.

5.16.1 Important terms to use

Southern Methodist University (in Keyword field use SMU)

Petroleum (in Keyword field use oil)

Oil well drilling rigs (in Keyword field use derricks)

Automobiles (in Keyword field use cars)

United States. Army (in Keyword field use U.S. Army)

Confederate States of America. Army (in Keyword field use Confederates; Confederacy; CSA)

For Union army-related Civil War items, use United States. Army (in Keyword field use Union Army; U.S. Army; Federal Army)

World War (1914-1918) (in Keyword field use World War 1, World War I, WW1)

World War (1939-1945) (in Keyword field use World War 2, World War II, WW2

Always uses Railroads, in addition to other railway terms.

North America--Mexican-American Border Region (in Keyword field use U.S. Mexico border)

Revolution (Mexico : 1910-1920) (in Keyword field use Mexican Revolution)

U.S. Army's Punitive Expedition into Mexico (1916) (in Keyword field use Pershing Expedition)

Railroad stations; Railroads (use both and in Keyword field use depots; train stations)

Railroad accidents (in Keyword field use wrecks; derailments)

Indians of North America

African Americans

Examples:

- Queensland--Mount Morgan; Mines and mineral resources; Mining engineering
- Business enterprises; Cities and towns; Office buildings; Adolphus Hotel (Dallas, Tex.)
- Railroad bridges--Design and construction; Railroads
- Floods; Flood damage; Natural disasters; Railroad bridges; Railroad tracks; Texas & Pacific Railway; Trestles; Texas--Trinity River; 1908 Trinity River Flood
- Southern Methodist University; College student newspapers and periodicals; College students
- Mexican War, 1846-1848; United States. Army; Chapultepec, Battle of, Mexico City, Mexico, 1847; Quitman, John Anthony, 1798-1858
- Johnson, Lyndon B. (Lyndon Baines), 1908-1973; Democratic Party (U.S.); American presidential elections; Political campaigns; Presidential candidates; Political candidates; Political slogans

5.17 Keywords

Dublin Core Element: Subject
Mandatory: Yes
Public: Yes
Searchable: Yes
MARC Field: 6XX

Description:

Free-form words and phrases, not available as Authorized Subject Terms, which describe the subject of a resource.

Style:

Only use words that cannot be found as Authorized Subject Headings. In many cases, this field will be blank.

Do not capitalize the first word in this field—capitalize only proper nouns.

Separate terms with a semicolon, space (;).

Use plural forms of words. *Note:* CONTENTdm provides an exact search. If you believe the singular form of a word is likely to be used as a search term, enter the singular form as a keyword.

With only two exceptions listed below (RPPC and stereoviews), d*o not* use form/genre terms (e.g., Paintings, Photographs, Portraits, Panoramic views) as keywords. Instead, enter them in the Form/Genre field.

Do not enter place information in the Keywords field if it is included in the Place field. (Some earlier records may include place information as a keyword.)

Use the keyword *stereoviews* for all stereographs.

Use RPPC for all real photographic postcards.

Alternate spellings and abbreviations of railroad names: Try not to use more than three. Do not use spaces around the ampersand. Avoid terms that use periods since most people will not type those in. Use the reporting symbol. Check previous records to ensure consistency.

It is *extremely* important to be consistent within a digital collection and between digital collections. Review items already cataloged from the same accession or that depict similar content, so that similar terms are used.

Do not use closing punctuation in this field.

5.17.1 Important keywords to use

SMU (in Authorized Subject Terms field use Southern Methodist University)

oil (in Authorized Subject Terms field use Petroleum)

derricks (in Authorized Subject Terms field use Oil well drilling rigs)

cars (in Authorized Subject Terms field use Automobiles)

U.S. Army (in Authorized Subject Terms field use United States. Army)

For Union-related Civil War items, use the keywords U.S. Army, Union Army; U.S. Army; Federal Army (in Authorized Subject Terms field use United States. Army)

Confederates; Confederacy; CSA (in Authorized Subject Terms field use Confederate States of America. Army)

World War 1, World War I, WW1 (in Authorized Subject Terms field use World War (1914-1918))

World War 2, World War II, WW2 (in Authorized Subject Terms field use World War (1939-1945))

U.S. Mexico border (in Authorized Subject Terms field use North America--Mexican-American Border Region)

Mexican Revolution [in Authorized Subject Terms field use Revolution (Mexico : 1910-1920)]

Pershing Expedition [in Authorized Subject Terms field use U.S. Army's Punitive Expedition into Mexico (1916)]

depots; train stations (use both as keywords and in Authorized Subject Terms field use Railroad stations)

wrecks; derailments (use both as keywords and in Authorized Subject Terms field use Railroad accidents)

RPPC (in Form/Genre field use Real photographic postcards)

stereoviews (in Form/Genre field use Stereographs)

Examples:

- RPPC; downtown; skyline; Southwestern Life Building; Great Southern Life Building; Praetorian Building
- RPPC; T&P; TP
- SMU
- Mexican-American War; U.S. Army; U.S. Mexico Border

5.18 Original Media

Dublin Core Element: Source
Mandatory: No, if using Physical Description field
Public: Yes
Searchable: Yes
MARC Field: 534

Description:

The Original resource from which the digital resource was derived. There may be two types, the original resource and a digitized version. Typically, use the Physical Description field (4.18). Original Media is only used upon request by the collection holder.

Style:

An alternative to Physical Description field.

Always use either the Physical Description or the Original Media field.

Precede description with the term *Original resource provided as:*

Use free text, but use the same termsthroughout the collection.

Use standard abbreviations and style that are common in the field of study.

Use lowercase, except for proper nouns, acronyms, and initialisms.

Do not use closing punctuation in this field.

Examples:

- Original resource provided as: 16 mm film
- Original resource provided as: 1/2-inch VHS
- Original resource provided as: ceramic sculpture
- Original resource provided as: printed newsletter

5.19 Physical Description

Dublin Core Element: Source
Mandatory: Yes
Public: Yes
Searchable: Yes
MARC Field: 300

Description:

Description of the physical characteristics of the original resource; includes extent, carrier type, other physical details, and dimensions.

Style:

Always use either the Physical Description or the Original Media (4.17) field.

Record information in the following order: (1) extent; (2) other physical details; and (3) dimensions.

Note: These style conventions are based on guidelines in Resource Description and Access (RDA), Chapter 3, http://access.rdatoolkit.org/, with a local customization for items that are units of a multi-part item, e.g. a photograph or print in an album or portfolio. AACR2 style may have been followed in earlier records. Leave physical descriptions in existing records as is.

5.19.1 Extent

Extent

Extent is "the number and type of units and/or subunits making up a resource."

Describe the type of unit using an appropriate term from the list of RDA carrier types, which is available at http://www.loc.gov/standards/valuelist/rdacarrier.html and in RDA, Chapter 3.3.1.3, "Recording Carrier Type," http://access.rdatoolkit.org/. Separate the number of units and the carrier type with one space ( ). Record terms in singular or plural, as appropriate.

The unmediated carrier types are:

- card
- flipchart
- object
- roll
- sheet
- volume

Specific instructions for recording the extent of _cartographic resources, notated music, still images, text, and three-dimensional forms_ are given in Chapters 3.4.2-3.4.6. _Note:_ The term _still images_ refers to resources such as drawings and photographs. The term _text_ refers to resources consisting of printed or manuscript text, with or without illustrative content.

For these five types of resources, describe the type of unit using an appropriate term from the list of carrier types found in Chapter 3.4.1.3, "Recording Extent." The list includes the following terms that may be useful when describing the extent of resources that typically are included in SMU Libraries Digital Collections:

- diagram
- drawing
- folded sheet
- leaf

- map
- medal
- page
- photograph
- portfolio
- postcard
- sculpture
- technical drawing

Check with an nCDS librarian about when to use sheets, leaves, and/or pages.

When the photograph is a print, use the term photographic print instead of photograph, following earlier LOC cataloging style.

When recording the extent of a resource that is an individual entity, give the number of units of the resource and the carrier type (e.g., 1 photographic print, 1 stereograph card).

When recording the extent of a multi-part resource that is an aggregation of entities (e.g., albums, portfolios), follow the number of units and carrier type of the resource with the total number of constituent parts (i.e., subunits), enclosed in parentheses and preceded by one space ( ). For example, the extent of an album containing 25 albumen prints is recorded as 1 volume (25 albumen prints). If the total number of subunits in a resource cannot easily be determined, omit that information.

If the number of pages in the physical and digital manifestations of a resource differs, use the number of pages or leaves given in the SMU Library Catalog bibliographic record for the accession.

Use the google doc, *Page Numbering for Pamphlets, Programs, and Booklets*, for information on page numbering for these types of documents.

If there is no pagination information on the item, only use information from the MARC record. Do not create pagination information.

Other Physical Details

The term *other physical details* includes attributes such as print process, base material, mount, and color.

Other physical details follow the extent of the resource, preceded by a colon, space (:).

Separate multiple details with a comma, space (,).

When an item is a subunit of a multi-part resource that is an aggregation of entities (e.g., pages of albums, prints in portfolios), follow any physical details with the extent of the resource of which it is a part. Use the format Other Physical Details, space ( ), *part of*, space ( ), extent of multi-part resource. For example, the extent and other physical details of one lithograph in a portfolio containing four prints is recorded as 1 print: lithograph, part of 1 portfolio (4 lithographs). If the total number of subunits in a resource cannot easily be determined, omit that information.

Photographs and photographic prints:

Include the photographic print process (e.g., albumen, ambrotype, daguerreotype, gelatin silver, salted paper, tintype) if it is known.

Always include the term *color* in the physical description of items such as color prints and postcards. For hand-colored items use the term *hand-colored*.

For images that appear black and white, do NOT use the term *black and white*.

Dimensions

Dimensions are "the measurements of the carrier or carriers and/or the container of a resource."

Dimensions follow other physical details of the resource, preceded by a semicolon, space (;).

When other physical details are not provided, dimensions appear directly after the extent of the resource, preceded by a semicolon, space (;).

Record height x width in centimeters. The recommended guideline is to measure to the closest centimeter, i.e. .5 and above round up, .4 and below round down. Smaller measurements are acceptable, e.g. the nearest half or tenth of a centimeter.

Use the metric symbol *cm. Note:* Symbols for metric measurements (e.g., mm, cm, m, KB, MB, GB) are not abbreviations and are not followed by a period.

You do not need to follow a full number with a decimal, e.g. 13 x 21 cm NOT 13.0 x 21.0 cm. Earlier items that were cataloged in this style do not need to be changed.

For still images, measure the pictorial area. Give dimensions with reference to the position (i.e., portrait or landscape orientation) in which the image is intended to be viewed.

If appropriate, follow the dimensions of an image with those of the carrier or container. Indicate the specific area to which additional measurements apply.

Put measurements for postcards. Earlier postcards were cataloged without measurements per AACR21 rules.

Do not use closing punctuation in this field.

Examples:

- 1 photograph: sixth plate daguerreotype; 7 x 8 cm
- 1 photograph: sixth plate tintype, hand-colored; 9 x 8 cm (case)
- 1 photographic print: albumen; 20 x 25 cm
- 1 photographic print: gelatin silver; 13 x 21 cm
- 1 photographic print (postcard): gelatin silver; 9 x 14 cm
- 1 photomechanical print (postcard): color; 9 x 14 cm
- 1 photomechanical print (postcard): linen texture, color; 9 x 14 cm
- 1 photomechanical print: color; 28 x 21 cm
- 1 photographic print: gelatin silver; 16 x 21 cm on 25 x 33 cm mount
- 1 sheet with newspaper clipping: part of 1 album (98 pages); 25 x 33 cm

- 1 sheet with 4 newspaper clippings: part of 1 volume (98 pages); 25 x 33 cm
- 1 slide: color; 35 mm
- 1 slide; 35 mm
- 1 slide: glass, color; 35 mm
- 1 slide: glass; 35 mm
- 1 photographic print: gelatin silver, part of 1 volume (42 gelatin silver prints); 24 x 29 cm on 30 x 41 cm mount
- 1 volume (104 albumen prints); 27 x 40 cm
- 1 album cover: part of 1 volume (75 gelatin silver prints); 31 x 42 cm
- 1 photographic print on stereo card: stereograph, albumen; 9 x 18 cm
- 1 technical drawing: blueprint; 51 x 78 cm
- 1 plate: enameled copper, color; 2.25 x 3 inches
- 10 sheets; 36 x 22 cm
- 30 x 24 inches
- 1 drawing: 59 x 37 cm
- 1 object: button; 2.1 cm
- 4 sheets; 28 cm (In Notes, add: Separate sheets, printed on one side only.)

Full Object vs. Item Level Physical Description Examples

(Note: The full object is typically presented as a .pdf; some earlier full objects may be presented as compound objects in ContentDM.)

- *The resource is a 32 x 22.4 cm pamphlet of 8 pages.*
  Full object-level description: 1 volume (8 pages); 32 x 22.4 cm
  Page or item-level description: 1 sheet: part of 1 volume (8 pages); 32 x 22.4 cm

- *The resource is a 27 x 32 cm pamphlet of 24 mounted prints; described in bibliographic record as "25 leaves of plates, one folded."*
  Full object-level description: 1 volume (25 leaves of plates, one folded); 27 x 32 cm
  Page or item-level description: 1 print: part of 1 volume (25 leaves of plates, one folded);

15 x 20 cm on 26 x 32 cm mount

- *The resource is a 27 x 40 cm album of 104 albumen prints.*
  Full object-level description   1 volume (104 albumen prints); 27 x 40 cm
  Page-level description: 1 photograph album cover: part of 1 volume (104 albumen prints); 27 x 40 cm
  Page- or item-level description: 1 photographic print: albumen, part of 1 volume (104 albumen prints); 27 x 40 cm

- *The resource is a 31 x 41 cm portfolio of 4 lithographs.*
  Full object-level description: 1 portfolio (4 lithographs); 31 x 41 cm
  Page or item-level description: 1 print: lithograph, part of 1 portfolio (4 lithographs); 31 x 41 cm

- *The resource is a 15 x 19 cm portfolio of 20 mounted cyanotypes.*
  Full object-level description: 1 portfolio (20 cyanotypes); 15 x 19 cm
  Page or item-level description: 1 photographic print: cyanotype, part of 1 portfolio (20 cyanotypes); 11 x 8 cm on 18 x 14 cm mount

Important Clarification: Do Not Guess!

Our goal in creating descriptive metadata is to provide sufficient information to help users "find, identify, select, and obtain" sought-after resources in our digital collections. We also want to create metadata in the most efficient way possible. To this end, as a general rule, if we can't readily, accurately identify or otherwise determine "other physical details" for inclusion in the Physical Description field, we will simply provide the information we have and move on. For example, do not attempt to include information about the medium if you are not sure about it, e.g. pencil, charcoal, watercolor, ink, etc. Rather, follow this format: 1 drawing: hand-colored; 18 x 24 cm, or 1 drawing; 32 x 22 cm.

5.20 Form/Genre

Dublin Core Element: Source
Mandatory: Yes
Public: Yes
Searchable: Yes
MARC Field: 655

Description:

Categorization of the original resource based on characteristics such as its function, intended purpose, method of representation, or type of content; the type of object it is.

Style:

Shared controlled vocabulary.

Use from TGM II (Genre and Physical Characteristic Terms), http://www.loc.gov/rr/print/tgm2/tgm2.txt.

When necessary, a non-TGM term (e.g., Scores) can be added to the controlled vocabulary for the Form/Genre field in CONTENTdm. The addition of an authorized term *must be approved in advance* by an nCDS librarian.

Use as many terms as apply.

Separate multiple entries with a semicolon, space (;).

Do not use broad terms that are repeated word-for-word in more narrow terms.

> Don't use all four: Negatives; Film negatives; Copy negatives; Reproductions
> Just Use: Film negatives; Copy negatives; Reproductions
>
> Don't use: Real photographic postcards; Photographic postcards
> Just Use: Real photographic postcards (this term is not in TGM, but has been authorized; always add RPPCs as a keyword)
>
> Don't Use Both: Photographs; Portrait photographs; Portraits
> Just Use: Portrait photographs; Portraits

Use applicable terms that are not in the TGM II in the Authorized Subject Headings and/or Keywords field, when they are not available in the TGM II.

Do not use closing punctuation in this field.

Resources that are an aggregation of entities:

Include the term that is applicable to the resource (e.g., Books, Photograph albums, Portfolios, Documents) in the Form/Genre field of each item that is a constituent part of the resource. For example, the term *Photograph albums* is entered in the Form/Genre field of each photograph in the album.

Specific Notes

For cased images, use the Form/Genre TGM term Photograph cases, and in the Keywords add "cased photographs."

For Memorandums, use memos in the Keywords fields.

For Correspondence, use Letters in the ASH field.

When using Tintypes, do not use Photographic prints.

For cityscapes, use the term Cityscapes, i.e. not Cityscape photographs; Cityscape paintings, etc.

Portraits are defined as an image of a person or persons in either a formal, i.e., studio, or informal, i.e., outside, setting where the person or persons are specifically posing for the camera/artist. Images of people <u>not posing</u> for the camera/artist, are <u>not considered portraits</u>. When cataloging a portrait of a person or group of people, use the Form/Genre term "Portraits" OR "Group Portraits" (not both), followed by the format-specific classification for the item, e.g., Portrait photographs; Portrait prints; Portrait drawings; Portrait paintings, etc. A full list of narrower terms can be found in the TGM under the term "Portraits" -
http://id.loc.gov/vocabulary/graphicMaterials/tgm008085.html

Examples:

- Photographs; Photographic prints; Photograph albums; Albumen prints
- Photographs; Photographic prints; Portraits; Portrait photographs; Card photographs; Cartes de visite
- Photographs; Photographic prints; Real photographic postcards; Gelatin silver prints
- Photographs; Ambrotypes; Portraits; Portrait photographs; Photograph cases
- Photograph albums; Photograph album covers; Photographs; Photographic prints; Gelatin silver prints
- Drawings; Pencil works; Metalwork
- Slides; Bronze; Metals; Metalwork; Sculpture
- Motion pictures; Video recordings
- Sound recordings; Concerts
- Design drawings; Contract drawings; Proposed works
- Badges; Memorabilia

5.21 Railway Identifier

Dublin Core Element: Description
Mandatory: No
Public: Yes

Searchable: Yes
MARC Field: 720

Description:

Free-text field for DeGolyer Library projects used to describe the railroad's short line nickname or the nickname of the car.

Style:

Transcribe from the item.

Examples:

- Sunset Limited
- Guthrie & Company
- Villa del Mar
- Cusi
- Felipe Carrillo Puerto

5.22 Locomotive/Car Number

Dublin Core Element: Description
Mandatory: No
Public: Yes
Searchable: Yes
MARC Field: 500

Description:

The locomotive or car number used in DeGolyer Library projects.

Style:

Enter the term *Locomotive* or *Car* followed by the number.

You do not need to use a leading number of zeros.

Examples:

- Locomotive 2003
- Locomotive 122
- Car 6
- Car 3627

5.23 Railway Line

Dublin Core Element: Description
Mandatory: No
Public: Yes
Searchable: Yes
MARC Field: 710

Description:

Name of the railway company used in DeGolyer Library projects.

Style:

Controlled vocabulary.

If an authorized term has not previously been created, find the railway line in the LOC Name Authority Headings.

If an LOC heading does not exist, spell out the full name of the railway company and use LOC style to create the term.

Add newly-created terms to the controlled vocabulary for the Railway Line field in CONTENTdm. Make sure the term is added to the Local Name Authority spreadsheet to be approved retroactively as a Name Authority.

Enter notable variations of the railway name, including accepted abbreviations, acronyms, and initialisms, in the Keywords field.

Note: There are two possible authorized terms for Southern Pacific. Use *Southern Pacific Railroad* for items dated 1865-1885, and use *Southern Pacific Company* for items dated 1885-1969. When the railway line is Southern Pacific Company, always enter *Southern Pacific Railroad* in the Keywords field.

Duplicate all terms in the Authorized Subject Heading field.

Examples:

- Atlantic Coast Line Railroad Company
- St. Louis & San Francisco Railway Company
- International & Great Northern Railroad
- Alabama & Vicksburg Railway
- Chicago & North Western Railway Company
- Ferrocarriles Nacionales de Mexico
- Ferrocarril Chihuahua al Pacifico
- Gobierno Federal Mexicano

Chapter 6: Technical Metadata

Note: **Always refer to and follow the guidelines in 4.2, "Style Guidelines for Cataloging," when creating SMU Libraries Digital Collections metadata records.**

6.1   Digital Resource Type

Dublin Core Element: Type
Mandatory: Yes
Public: Yes
Searchable: Yes
MARC Field: 336

Description:

Categorization of the digitized resource based on the type of object it is.

Style:

Shared controlled vocabulary.

The complete set of terms is listed below in "Examples."

When necessary, terms can be added. The addition of a term *must* be approved in advance by an nCDS librarian.

Examples:

- Image
- Text
- Video
- Audio
- Printed music

6.2   Digitization Date

Dublin Core Element: Date
Mandatory: Yes
Public: Yes
Searchable: No
MARC Field: 264

Description:

Date that the *digital* resource was created.

Style:

Give the year the resource was digitized. *Note:* The creation date for the *original* resource is entered in the Date field.

Include the term *Digitized:* before the date.

Do not use closing punctuation in this field.

Example:

- Digitized: 2009
- Digitized: 2017

6.3   Digital Format

Dublin Core Element: Format
Mandatory: Yes
Public: Yes
Searchable: Yes
MARC Field: 347, 516

Description:

Basic characteristics such as file size, dimensions, duration, etc., of the derivative file uploaded to CONTENTdm. In the case of audio or video presented as streaming files in SoundCloud or Vimeo, describe the streaming file (not the .html file that is actually uploaded into CONTENTdm).

Style:

When referring to file types, use a period followed by three-letter file extension. Exception: .html.

For still images, describe the format in which the upload file is displayed in CONTENTdm using the three-letter file extension. Precede file extension with the term *Displayed as*.

If the upload file is displayed in JPEG2000 format, i.e., .jp2, also provide the format of the upload file. Precede the file extension of the upload file with the term *uploaded as.*

For documents presented as a .pdf, precede file extension with the term *Displayed as.* Include the number of pages in the .pdf, which may differ from the number of pages in the original resource, and the file size. Precede the number of pages with a semicolon, space (;). Follow with a comma, space (,), and the file size. *Note:* This information may have been included in the Digitization Process field in earlier records. Leave this information in existing records as is.

For audio-video files, use as much detail as possible about the streaming file.

Separate areas of the description with a semicolon, space (;).

Use the six-digit space for Total Running Time (TRT), e.g. 00:42:58.

Do not use closing punctuation in this field.

Examples:

- Displayed as .jp2; uploaded as .jpg
- Displayed as .pdf; 3 pages, 1.5 MB
- Displayed as .mov streaming file embedded in .html page; TRT 00:10:08.30; Streaming File: Presented in Vimeo as 640 x 480
- Displayed as .mp3 streaming file embedded in .html page; TRT (Track 1) 00:12:36, 192 kbps, MPEG Layer 3 Audio, 17.3 MB; TRT (Track 2) 00:36:57, 192 kbps, 50.7MB; Streaming file presented in Soundcloud
- Displayed as .mov streaming file embedded in .html page; TRT: 00:42:58; MPEG-4 AVC, H.264, Quicktime; Aspect Ratio: 16:9, pillarbox; Resolution: 1920 x 1080; Frame rate: 23.98 fps; Audio: Mono, PCM, 48 khz, 16 bps; 10.3 GB; Streaming file presented in Vimeo

6.4   Archival File Resolution

Dublin Core Element: Format
Mandatory: No
Public: Yes
Searchable: Yes
MARC Field: 347

Description:

The pixel array, bit depth information, color space, and/or file size of the archival file.

Style:

Precede description of pixel array, bit depth, and color space with the term *Archival scan:* or, if another digital capture process was used, with the term *Archival file:*

Give image resolution in width x height (e.g., 5700 w x 4100 h pixels). *Note:* Resolution may have been expressed as ppi or dpi in earlier records. Leave archival file resolution in existing records as is.

Do not use a comma within the number describing resolution.

For composite images, list the pixel array individually for recto and verso. Separate descriptions with a semicolon, space (;).

For audio-visual materials, provide technical details of the master file(s) similar to the format for derivative files, as described in Digital Format (5.3).

Do not use closing punctuation in this field.

Note: This field differs from the Physical Description field, in which dimensions are given in height x width.

Examples:

- Archival scan: 6400 w x 4800 h pixels, 48-bit RGB
- Archival scan: 3018 w x 4903 h pixels, 48-bit RGB (recto); 3020 w x 4900 h pixels, 48-bit RGB (verso)
- Archival file: 5616 w x 3744 h pixels

6.5   Digitization Process

Dublin Core Element: Format
Mandatory: Yes
Public: Yes
Searchable: No
MARC Field: 538

Description:

The technical information about the hardware, software, and processes used to create the archival and upload files.

Style:

Precede description of digitization process with the term *Digitization process:*

Include information that an item has been color balanced, cropped, and/or adjusted in the section that describes the derivative.

Do not use a comma within the number describing resolution.

Capitalize the first word of the description.

Separate sections of the description with a semicolon, space (;).

Do not use closing punctuation in this field.

Examples:

- *For flatbed scanning*

    Digitization process: Master scanned using Epson V750 Pro as 600 ppi, 48-bit, RGB .tif; derivative resampled as 3000 w pixels, 24-bit .jpg

    Digitization process: Master scanned using Epson V750 Pro as 1200 ppi, 48-bit, RGB .tif; service master color corrected and cropped; derivative resampled as 3000 w pixels, 24-bit .jpg

    Digitization process: Recto and verso each scanned using Epson V750 Pro as 600 ppi, 48-bit, RGB .tif; recto and verso files combined to make composite derivative and resampled as 3000 w pixels, 24-bit, RGB .jpg

    Digitization process: Master scanned using an Epson 750 as 1200 ppi, 48-bit, RGB .tif; service master changed to black and white, hues and contrast adjusted, and cropped; derivative resampled to 3000 w pixels, 24-bit .jpg

    Digitization process: Scanned using an Epson 750 as 1200 ppi, 48-bit, RGB, .tif; service master adjusted and cropped; derivative resampled to 3000 pixels on the long edge, 24-bit .jpg

    This statement may be used to save time when providing information for large accessions with both horizontal and vertical images:

Digitization process: Master scanned using Epson V750 Pro as 600 ppi, 48-bit, RGB .tif; derivative resampled as 3000 pixels on the long edge, 24-bit .jpg

- *For .pdf files*

    Digitization process: Pages scanned as 600 ppi, 48-bits per channel, RGB .tif files; .pdf created and compressed in Adobe Acrobat

    Digitization process: Archival photographs of each page created at 16352 w x 12264 h pixels; pages cropped and resized in Photoshop; .pdf created and optimized in Acrobat with .jpg derivatives

    Digitization process: Original newspaper copied, then scanned; files turned into multiple page, searchable .pdf

- *For Bookeye scanner*

    Digitization process: Master scanned using Bookeye scanner as 9071 w x 7370 h pixels, 24-bit, RGB .tif; scan cropped to a 5000 w x 3000 h pixels, 24-bit, RGB .tif; master file cropped and resampled as 3000 w pixels, 24-bit, RGB .jpg

    Digitization process: Scanned with Bookeye scanner, master file cropped to 4280 w x 5702 h pixels and saved as 380 ppi, 16-bit .tif; derivative resized to 3000 w pixels and resaved as 8-bit .jpg

- *For digital photography*

    Digitization process: Photographed using a Hasselblad H4D-200MS as 48-bit, RGB, .tif file; derivative cropped and resampled to 3000 pixels on the long edge, 24-bit .jpg

- *For digital video recording*

    Digitization process: Received as 16 mm film; transferred to DV format using telecine; web file compressed in Quicktime Pro using AAC Stereo and h.264 (768 kbps), saved as MPEG-4

Digitization process: Digital master video file created from original media as 24p capture from HD camera with direct, line level audio from magnetic soundtrack. Compressed and edited in Adobe Premiere

Chapter 7: Administrative Metadata

Note: **Always refer to and follow the guidelines in 4.2, "Style Guidelines for Cataloging," when creating SMU Libraries Digital Collections metadata records.**

7.1   Physical Location

Dublin Core Element: Identifier
Mandatory: No
Public: Yes
Searchable: Yes
MARC Field: 535

Description:

Information concerning box, series, and other archival storage details.

Style:

Capitalize terms such as *Box* and *Series*.

Separate terms with a comma.

Do not use closing punctuation in this field.

Use correct number of leading zeros in all folder, box, series, etc., numbers, even if they are not included on the written container.

Include the textual folder name, if there is one.

This field can be set as a controlled vocabulary for a single collection, but it should not be set as a controlled vocabulary that is shared across collections.

Examples:

- Box 3, Folder 21
- Cabinet 1, Drawer 1
- Box 02, Folder 07, Callier Center Dedication

7.2   Call Number

Dublin Core Element: Identifier
Mandatory: Yes
Public: Yes
Searchable: Yes
MARC Field: 090

Description:

Call number of the original resource from which the digital object was derived or created.

Style:

Shared controlled vocabulary.

Record the call number *exactly* as it appears in the SMU Library Catalog holdings record for the accession.

Do not use closing punctuation in this field.

If an authorized term has not previously been created, add it to the controlled vocabulary for the Call Number field in CONTENTdm.

Examples:

- Ag1982.0231
- E83.89 .M55 1891
- Folio-2 F804.T2 A93
- Broadside KFT1600.5 1836 .A3
- Pamphlet HE2791 .H242 1880
- Mss 0060

7.3   Identifier

Dublin Core Element: Identifier
Mandatory: No
Public: Yes
Searchable: Yes
MARC Field: 02X

Description:

Used for special identifying information (e.g., ISBN, file name, character string, reference URL).

Style:

Do not use closing punctuation in this field.

7.4   Upload File Name

Dublin Core Element: Identifier
Mandatory: Yes
Public: Yes
Searchable: Yes
MARC Field: 856

Description:

Name of the file uploaded to CONTENTdm, including the three-letter file extension.

Style:

Record the file name, including the three-letter file extension. Exception: .html for web pages.

Do not use closing punctuation in this field.

Examples:

- ag2005_0001_01_brackettville_001c_opt.jpg
- ephemera_c920_opt.pdf
- ag1986_0583_04_opt.jpg
- ag2005_0004_04_seward_opt.jpg
- ag2001_136_01_r_opt.jpg
- http://digitalcollections.smu.edu/all/cul/wfaa/video/wfaa_1970_04_27_28_29_30.html

7.5   Archival File Name(s)

Dublin Core Element: Relation
Dublin Core Qualifier: HasFormat
Mandatory: Yes
Public: Yes
Searchable: Yes
MARC Field: 787

Description:

Name of file(s) from which optimized upload derivative was derived, including three-letter file extension.

Style:

Record the file name(s), including the three-letter file extension.

Include master and service master file(s). Separate file names with a semicolon, space (;).

Provide only the page range for 4 or more files. Include the name of the first file and the last file, separated by a space, hyphen, space (-).

Do not use closing punctuation in this field.

Examples:

- ag1983_0282_01.tif
- ag1983_0282_01.tif; ag1983_0282_01_sm.tif
- ag1982_0122x_35.CR2; ag1982_0122x_35_sm.tif
- ag2001_136_01_r.tif; ag2001_136_01_v.tif
- ttb_13_miracleinharlem_up.mp4
- folio_hc131_a15_1855_1857_v1_000a.CR2 - folio_hc131_a15_1855_1857_v1_346.CR2; folio_hc131_a15_1855_1857_v1.pdf
- wfaa_1971_01_22_23_24.mov

7.6   Digital Collection

Dublin Core Element: Identifier
Mandatory: Yes
Public: Yes
Searchable: Yes
MARC Field: 856

Description:

The name of the digital collection to which the item belongs.

Style:

Shared controlled vocabulary.

Record the name of the digital collection *exactly* as it appears on the collection home page in CONTENTdm.

Do not use closing punctuation in this field.

When a new digital collection is created, add the name to the controlled vocabulary for the Digital Collection field in CONTENTdm.

Examples:

- Texas Artists: Paintings, Sculpture, and Works on Paper
- JCPenney Dynamo Newsletters
- Tyler, Texas Black Film Collection
- Hervey A. Priddy Collection of American Presidential and Political Memorabilia
- George W. Cook Dallas/Texas Image Collection
- Mexico: Photographs, Manuscripts, and Imprints
- Potter Art Iron Studios Collection
- WFAA Newsfilm Collection, ca. 1960-1978
- Southern Methodist University Publications and Media Collection

7.7   Library

Dublin Core Element: Publisher
Mandatory: Yes
Public: Yes
Searchable: Yes
MARC Field: 535

Description:

The library or holding institution to which the original resource belongs.

Style:

Shared controlled vocabulary.

When necessary combine units. Separate units with a semicolon, space (;).

Do not use closing punctuation in this field.

Examples:

- Bywaters Special Collections; Hamon Arts Library
- G. William Jones Film and Video Collection; Hamon Arts Library
- DeGolyer Library
- SMU Archives
- Edwin J. Foscue Map Library
- Fort Burgwin Library (SMU-in-Taos)
- Government Information Resources
- Hamon Arts Library
- Meadows Museum
- Dallas Museum of Art

7.8   Publisher

Dublin Core Element: Publisher
Mandatory: Yes

Public: Yes
Searchable: Yes
MARC Field: 264

Description:

An entity or entities responsible for the *digital* publication of the item.

Style:

With few exceptions, this field will say: ☐ Central University Libraries, Southern Methodist University

Use the name of the organization that is responsible for publishing the *digital* resource. Note: The publisher of the *original* resource is entered in the Contributor(s) field.

In the case of a hierarchy, list the levels of an organization from the smallest to the largest, separated by a comma, space (,).

Separate multiple entities with a semicolon, space (;).

Examples:

- Central University Libraries, Southern Methodist University

---

7.9   Rights

Dublin Core Element: Rights
Mandatory: Yes
Public: Yes

Searchable: No
MARC Field: 540

Description:

A rights management statement that contains information concerning accessibility, reproduction of images, copyright holder, restrictions, securing permissions for use of text or images, etc.

Style:

All of the items in SMU Libraries Digital Collections must be analyzed for rights/permissions:
http://digitalcollections.smu.edu/all/cul/docs/copyright%20process_2010.pdf

Use one of the statements provided below in "Examples." Ask an nCDS librarian for help in deciding which statement is appropriate for the resource.

Make sure the contact information is correct for the holding library.

In special cases, rights statements may be created to meet the needs of an item or accession.

Use Statement 1 for works in the public domain.

Use Statement 2 for orphan works or for works for which SMU does not hold publishing rights. For items that are orphan works, most likely in the public domain, and/or deemed a low risk, but are not being uploaded with restricted access status, upload a derivative that is 750 pixels on the long edge. In select cases, we may still upload the item at 3000 pixels. Items that are not a low risk must be made available on a restricted basis (e.g., the metadata is visible to off-campus users, but the image is visible only to campus IP addresses). Enter the term *Restricted access.* in the Notes field. Restricted items should be uploaded at 750 pixels on the long edge.

Use Statement 3 for works to which SMU clearly holds the rights.

For collaborative projects, use alternative wording based on the needs of rights holders outside of SMU.

Examples:

- *Statement 1*

  Please cite DeGolyer Library, Southern Methodist University when using this file. A high-resolution version of this file may be obtained for a fee. For details see the https://sites.smu.edu/cul/degolyer/research/permissions/ web page. For other information, contact degolyer@smu.edu.

  Please cite Bywaters Special Collections, Southern Methodist University when using this file. A high-resolution version of this file may be obtained for a fee. For more information contact bywatersspecialcollections@smu.edu.

- *Statement 2*

  This item may be protected by copyright law. Please cite DeGolyer Library, Southern Methodist University when using this file. For more information contact degolyer@smu.edu.

  This item may be protected by copyright law. Please cite Bywaters Special Collections, Southern Methodist University when using this file. For more information contact bywatersspecialcollections@smu.edu.

- *Statement 3*

  This item is protected by copyright law. Please cite DeGolyer Library, Southern Methodist University when using this file. For more information contact degolyer@smu.edu.

  This item is protected by copyright law. Please cite Bywaters Special Collections, Southern Methodist University when using this file. For more information contact bywatersspecialcollections@smu.edu.

7.10 Tags

Dublin Core Element: None
Mandatory: Yes
Public: No
Searchable: Yes
MARC Field: None

Description:

This is a hidden searchable field to find items by the month in which they are uploaded and/or by cataloger. Other specialized terms may be created on a case-by-case basis.

Style:

Shared controlled vocabulary.

Include the upload date and the name of each digitizer and cataloger who works on the item.

Use the following format for the upload date: cul_month_yyyy

Compound objects: Always include the term *compound_object* in the Tag field of the compound object-level metadata.

Separate entries with a semicolon, space (;).

If an authorized term has not previously been created, add it to the controlled vocabulary for the Tags field in CONTENTdm.

Examples:

- cul_september_2012; John_M; Carol_M

- cul_march_2013; compound_object; John_M

- cul_november_2015; john_m; margaret_c_cat

- cul_december_2015; john_m; Eldric_B