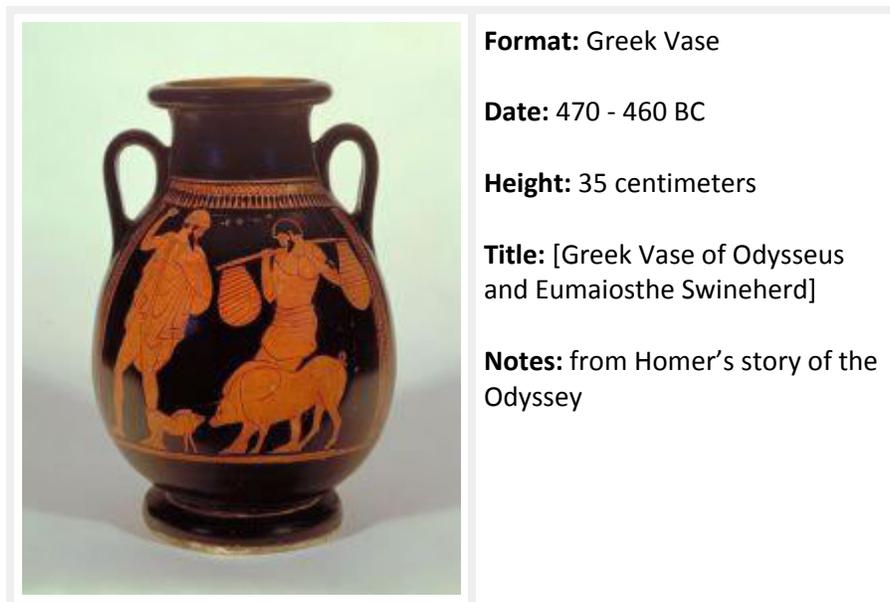


## Digital Library of the Caribbean (dLOC) Metadata Guide

### What is Metadata?

Metadata is *data about data*, or *defined information about a particular thing*. Library and museum metadata may look something like this:



### Core Data Elements to Include in a Record When Submitting a Document

Title information

#### 1. Title

The title is the name given to the resource. All items should include information in the Title field. Title information may come from the cover or title page of a book or document or may come from a description of a map or image. For an existing title or caption, transcribe it as it is:

Ex: Crisis of the West Indian family

Ex: Public policy

The system looks for identifiable leading articles in English, Spanish, and French and removes them for sorting purposes. In some systems you would need to remove the initial articles (e.g.; a, an, the). Thus, the initial articles should be included when entering titles.<sup>1</sup>

Ex: The Arawak girl

For items where there is not a clear title, the most important or unique keywords (who, what, where, when) should come first.

## 2. Other Titles

“Other titles” refers to title information after the title proper. Each cataloguer can decide how many fields should be informed by adding as many lines as necessary. The sub-fields that can be added are the following:

- The *subtitle* is a word, phrase, character, or group of characters that contains the remainder of the title information after the title proper

Ex: Politics, analysis and alternatives (as a subtitle to “Public policy”)

- The *abbreviated title* is a shorter version of the main title

Ex: in the case of a map with a very long title such as the following map (<http://dloc.com/UF00029173>), the abbreviated title could be “L'isle St. Domingue ou Espagnole”

- The *alternative title* is a variation of the main title
- The *series title* is the title of a series to which the item belongs

Ex: the individual item has its own title and is also part of a series that contains various titles. For instance, the *All Jamaica Library* series includes *One Brown Girl and a Jamaica Story* (<http://dloc.com/UF00078555>), *Maguerite: a Story of the Earthquake* (<http://dloc.com/UF00078558>), *Maroon Medicine* (<http://dloc.com/UF00078557>), and *Becka's Bukra Baby: Being an Episode in the Life of Noel* (<http://dloc.com/UF00078556>).

- The *translated title* is the original or translated title of a foreign language item. It should be informed only if it mentioned on the document

Ex: the document <http://dloc.com/UF00073879> mentions the title in German and Latin

- The *uniform title* is the title chosen to represent a work that has appeared under varying titles

Ex: a newspaper that has remained with the same publisher and publication place, but where the name has varied over time as with the Orlando Morning

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<sup>1</sup> Initial articles should be included for display purposes. The main articles in French, Spanish, and English are programmed into the system, so they are automatically removed for sorting purposes. This allows the 245 to be built correctly in MARC, including the article but showing the length of the non-sort article.

Sentinel which was also published as “New Year Sentinel-Star, Orlando Sunday Sentinel,” “Orlando Sunday Sentinel-Star,” and “Sunday Sentinel-Star”

#### Physical information

The physical description contains information relating to the physical characteristics of the resource described.

### 3. Type

In this field the original nature of the digitalized document must be informed among the pre-selected options:

- **Aerial** for large scale overhead photographs, generally taken from an airplane
- **Archival** is selected for materials that may not be individually cataloged. This type can also be applied to digitally born documents, such as slide show presentations. Individual archival items, like letters are also archival. Diaries and manuscripts are often listed under archival or book, with further information provided in the physical description and genre.
- **Artifact** refers to three dimensional objects, like ephemera items, such as cigar labels
- **Audio** for a resource which is predominantly a sound recording in nature
- **Book** for single-volume textual materials or any monograph, including bound theses. Diaries and manuscripts are often listed under archival or book, with further information provided in the physical description and genre.
- **Map** for cartographic materials or a non-photographic image of a specified area
- **Newspaper** for digitized newspapers
- **Photograph** for any non-aerial photography
- **Serial** for multi-volume, non-newspaper material
- **Video** for a resource which is predominantly a video recording in nature

This field is compulsory. Archival encompasses more variety and is one of the most commonly seen types.

In addition to “Type” and “Physical description,” “Genre” can be entered. “Genre” contains terms that give more specificity for the form of an object than the broad terms used in “Type”. The terms may be from a controlled list with a designation of the authoritative list used in the authority attribute, or it may be an uncontrolled term. If no authority is specified, it is assumed that the term is uncontrolled.

### 4. Physical description

The physical description contains information relating to the physical characteristics of the resource described. For best results, the physical description information should be entered as

*[Page Number Information] ; [Illustration Information] ; [Size or Dimensions Information].*

The actual physical description may not be this complete; there is no minimum requirement for physical description information. If no information is entered in the Physical Description field, the Resource Type information will display as the Physical Description in the citation information. Any physical description information that is known can be entered here.

Ex:

12 p.: ill. ; 23 cm.

141 p. : illus. ; 19 cm

120 p., 2 leaves of plates : ill. (some col.) ; 17 cm.

128 p., 16 leaves of plates : col. ill. ;

## 5. Language

The language field is a designation of the language in which the intellectual content of a resource is expressed. For language material (i.e., books and continuing resources), the language code is based on the text of the item. The term “text” refers to the principle work(s) included within the publication, excluding the preface, introduction, foreword, appendices, etc. For maps, the language of names and text associated with the map or globe determines the code used. For original or historical graphic material, opaque graphic material, and three-dimensional materials, the language content is that associated with the material (i.e., captions or other text associated with the item or collection) that are part of the chief source of information. For mixed materials, the language code is based on the predominant language of an item or materials in a collection.

The language field is repeatable and represents each of the major languages used in the resource being described.

Languages should be entered either by the text of the language, the ISO code, or by the term from the MARC Code List of Languages.

Examples:

<i>Text of the language</i>	<i>ISO code 639 2-B</i>	<i>MARC Code list</i>
Arawak		arw
Carib		car
Creoles and Pidgins, English-based		cpe
Creoles and Pidgins, French-based		cpf
Creoles and Pidgins, Portuguese-based		cpp
Creoles and Pidgins (Other)		crp
Dutch	dut	dut

English	eng	eng
French	fre	fre
Haitian French Creole	hat	hat
Latin	lat	lat
Portuguese	por	por
Spanish	spa	spa

## 6. Identifier

The identifier is an unambiguous reference to the resource within a given context (e.g. LCCN, ISBN, ISSN). It distinctively identifies a resource. This code is given/decided by the reference system(s) in use. For instance, for museum objects the identifiers are the local accession numbers. These are given by the individual museums and reference their own internal system. Similarly, libraries can give their call numbers. If a national or international identifier is available, like an ISBN or ISSN, then the number is in relation to those systems.

Permanent URLs are also identifiers. All items in dLOC have permanent URLs and these map to the 856 in MARC. Other permanent URLs in MARC can also be included.

## 7. Holding location

In this field must be indicated where the **original** resource is held.

A menu allows the user to enter the holding location's controlled code and (optionally) enter a description for the holding location. If no description is entered, the default will be used. The best practice for entering the holding location is to select the institution code from the controlled list.

There is no need to type the institution's name in the provided field, as the standard form of the institution's name will be stored when your update is saved. If you wish to use a non-standard form of the institution's name for any reason, you can type that into the provided field and it will be used instead.

If the code for an institution is not present, contact a system administrator to add that institution to the system.

## 8. Source

This field indicates the institution or sub-institutional source for the **digital** instance of the resource. It may be different from the Holding location, which usually represents the institution that houses the **original** item from which this digital resource is derived. For born-digital objects, both fields will be identical.

In case the source institution and holding location are the same entity, the source institution usually holds the highest level information about the institution:

Ex: University of Florida

Meanwhile, the holding location may hold more specific information:

Ex: Latin American Collections, University of Florida

Name Authorities

**9. Creator**

The creator is an entity (person, group, corporation, institution) primarily responsible for making the content of the resource available or associated with the item in some way. For example, it could be the authors, illustrators, binders, publishers, or conferences. This field is repeatable as many times as necessary to include all relevant mentions (Use the plus sign to the right of the field to add any additional authors of this material).

Enter names as “LastName, FirstNameMiddleInitial.”Optionally, add birth year according to the following format.

In entering names, the goal is to be able to locate materials by the same creator easily. The examples below show a typical standard name format. This may vary, however, because the reason to enter the names in a particular form is to support the overall goal of findability and disambiguation. Findability is supported by being consistent in the way the name is entered, which allows people to find materials by the same creator. Creators with the same or similar names can be disambiguated with middle initials and birth dates, or other information. The goals of findability and disambiguation should guide the entry of names.

*Example of standard form:*

Williams, Eric E., 1911-1981

*Examples of possibly non-standard forms:*

Williams, Eric Eustace, 1911-1981

Williams, Eric, 1911-1981

Williams, E.E., 1911-1981

Most items should include information about at least one creator. All persons, corporations, or conferences related to the item should be included in the metadata.

A role can be added between parentheses if necessary. When setting roles, you can use any appropriate role name. Some standard role names linked to examples appear in the table below:

Actor	Consultant	Manufacturer	Research team member
Animator	Contributor	Musician	Reviewer
Architect	Curator	Narrator	Scientific advisor
Artist	Degree Grantor	Papermaker	Sculptor

Author, primary	Director	Performer	Signer
Author, secondary	Dissertant	Photographer	Singer
Binder	Designer	Printmaker	Speaker
Calligrapher	Editor	Printer	Sponsor
Cartographer	Engraver	Programmer	Surveyor
Choreographer	Engineer	Producer	Stereotyper
Cinematographer	Illustrator	Publisher	Thesis advisor
Compiler	Interviewee	Puppeteer	Transcriber
Composer	Interviewer	Recipient	Translator
Conductor	Landscape Architect	Researcher	Woodcutter
Conference	Lithographer	Research team head	Wood-engraver

The specified role(s) are listed in a separate subfield so that all of the names can be easily cross-searched under “Creator”. This facilitates searching, especially given that a single “Creator” may have many roles in different texts.

Ex:

<http://dloc.com/UF00003801>

Bonheur, Raymond (Illustrator)

Levasseur, Victor (Cartographer)

Laguillermie, Frédéric (Engraver)

## 10. Publisher

The publisher is the entity responsible for making the original resource available to the public.

## 11. Place of publication

This field refers to the geographic location of the publisher or the location where the material was created. The place of publication information is generally found with publisher information on the title page of physical items.

For large cities, only the city name is necessary; for smaller, less well-known cities, or for cities that may be mixed up with others, state or country information should be included as well.

Ex: New York

Ex: London

Ex: Gainesville, Fla.

Ex: Kingston, Jamaica

## 12. Date of publication

This field is dedicated to the publication date of the resource. The best practice for entering the publication date for monographs is to enter the full 4-digit year. If the publication date is uncertain, this can be indicated by using the abbreviation “ca.” for circa, or by entering a likely range of dates; other abbreviations, brackets, or question marks should not be used.

Ex: 2011

Ex: ca. 1677

For items like newspapers or other frequently published materials, a more specific publication date may be provided in “Month Date, Year” format.

Ex: May 10, 2011

## Subjects

### 13. Subject

This field informs the topic(s) of the content of the resource. It can be repeated.

The subject terms or phrases must represent the primary topic(s) on which a work is focused.

Subject will be expressed as keywords, key phrases or classification codes that describe a topic of the resource. Recommended best practice is to select a value from a controlled vocabulary or formal classification scheme. A classification scheme is the descriptive information for the arrangement of objects into groups based on shared characteristics. Formal classification schemes include the Bibliothèque nationale de France’s RAMEAU and the Library of Congress Subject Headings (LCSH), which allows items with shared subject matter to be arranged together.

Subject added entries are assigned to a bibliographic record to provide access according to generally accepted thesaurus-building rules (e.g., Library of Congress Subject Headings (LCSH), Medical Subject Headings (MeSH)).

Subjects are complex elements and include the following sub-elements:

- *Topical subject terms* which consist of general subject terms, including names of events or objects
- *Chronological subject terms*
- *Geographic subject terms* which consist of jurisdiction names and subject subdivisions
- *Form/Genre subject terms* indicating the genre, form, and/or physical characteristics of the materials being described. A genre term designates the style or technique of the intellectual content of textual materials or, for graphic materials, aspects such as vantage point, intended purpose, characteristics of the creator, publication status, or method of representation. A form term designates historically and functionally specific kinds of materials distinguished by their physical character, the subject of their intellectual content, or the order of information within them. Physical characteristic terms designate historically and functionally specific kinds of materials as distinguished

by an examination of their physical character, subject of their intellectual content, or the order of information with them.

- *Occupational subject terms*
- Name of the *Authority* the term comes from. A list of authority sources is maintained [here](#).

#### 14. Spatial subject

This field refers to the spatial characteristics of the intellectual content of the resource. Spatial coverage refers to a physical region (e.g., celestial sector) using place names.

Enter as much detailed information about the spatial information as possible, down to the actual area or address if possible. The area can generally be entered as commonly referenced.

Ex: Martinique

Ex: Caracas, Venezuela

Ex: Miami, Florida

This form element allows the user to enter a spatial subject term, but does not allow the data to be entered hierarchically, nor is authority accepted.

The most proper way to reference the spatial coverage of an item is to use a geographic name given in a hierarchical form, which is both readable by humans and passable by machines. This form can be applied to the degree of specificity that is known or relevant and used to generate browsable hierarchies even when values are specified to different levels. Explicit inclusion of the complete hierarchy is of potential benefit for automated consultation of a gazetteer to derive map coordinates or to support a map-based interface for searching by country or state.

The sub-elements of the hierarchical spatial data are:

- Continent
- Country
- Province
- Region
- State (or the equivalent first-level political divisions under country)
- Territory
- County (or the equivalent second-level political divisions under country)
- City
- CitySection (neighborhood, parks, or streets)
- Island
- Area (Non-jurisdictional geographic region/feature; e.g.; Nile River)
- Name of the *Authority* the term comes from
- The *Language* of the term may also be included

To enter a deeper hierarchy for the spatial subject, you can use two dashes between the different levels of hierarchy:

Ex: United States -- Florida -- Miami-Dade County -- Miami Beach -- South Beach

## 15. Coordinates

Coordinate points contain the spatial characteristics of the intellectual content of the resource, referring to a physical region using coordinates.

Multiple coordinates can be entered, but none are required. Adding them will allow the item to appear on a map. In the near future, a new method for entering them (perhaps by placing a marker on a map) will be available. Currently, coordinates can be entered as decimal degrees. They should not be entered in notation with degrees, minutes, and seconds; the degree symbol should not be entered.

## Notes

## 16. Abstract

The abstract provides a summary of the content of the resource.

This field should be used for unformatted information that describes the scope and general contents of the materials. This could be a summary, abstract, annotation, review, or only a phrase describing the material.

Best practices for the specific case of oral histories: in the abstract should be included: a) interviewer's name; b) interviewee's name; c) address of the interview; d) date of the interview; and e) project name or reason for the interview.

## 17. Note

Many kinds of information can be included in this field, as for instance (but not limited to):

- Edition or expression (translation, abridgement and arrangement information)
- Information about the immediate source of acquisition of the described materials (used primarily with original or historical items, or other archival collections)
- Biographical information about an individual or historical information about an institution or event used as the main entry for the item being cataloged
- Information about the current and former issuing bodies of a continuing resource (a journal, for example)
- Unformatted note giving irregularities and peculiarities in numbering or publishing patterns, report year coverage, revised editions, and/or issuance in parts
- Copy-specific field that contains information concerning the ownership and custodial history of the described materials from the time of their creation to the time of their accessioning, including the time at which individual items or groups of items were first brought together in their current arrangement or collation.

- General note about the donation of the source documents.
- Designation of an academic dissertation or thesis and the institution to which it was presented
- Contract, grant, and project numbers when the material results from a funded project. Information concerning the sponsor or funding agency also may be included.

#### **18. Further help**

For additional information on these or any topics, a long and thorough guide is available online:  
<http://dloc.com/help/metadata>