



GUIDELINES FOR THE CREATION OF DIGITAL COLLECTIONS

Best Practices for CARLI Digital Collections Descriptive Metadata

This document sets forth guidelines for creating descriptive metadata for items in CARLI Digital Collections (CDC), including minimum standards and required metadata fields. It was originally created by the CARLI Digital Collections Users' Group (DCUG) and is maintained and updated by the CARLI Created Content Committee (CCC).

This document includes information from the [Required Metadata Fields for CARLI Digital Collections](#) document.

Definition of Descriptive Metadata

Descriptive, or bibliographic, metadata describe the content of an object. Other types of metadata provide information about the structure and arrangement of the object (structural metadata) or its lifecycle as a digital object (administrative or technical metadata). Structural and administrative metadata are not the subject of this document.

Dublin Core

Libraries managing digital collections in the CDC environment may use any descriptive metadata scheme to describe the objects in their collections, but Dublin Core is strongly recommended as a minimum standard. This document provides best practices for the use of the Dublin Core metadata scheme only; other metadata schemes are not detailed here.

All metadata fields in CONTENTdm, regardless of which scheme is used, have the option of being mapped to Dublin Core fields in Web Administration. Mapping fields to Dublin Core facilitates cross-collection searching within CDC and the sharing of item-level metadata outside of the CDC environment. It is strongly recommended that metadata fields for CDC collections are mapped to Dublin Core in Web Administration as appropriate. For more about shareable metadata, please refer to [Guidelines for the Creation of Digital Collections: Best Practices for Shareable Metadata](#).

For questions about this document, please contact CARLI at support@carli.illinois.edu.

CARLI Dublin Core Metadata Element Set Implementation Recommendations

CARLI Digital Collections uses CONTENTdm as its digital asset management system. Five metadata fields outlined below are “required” in CARLI Digital Collections: Title, Collection, Language, Rights, and Type. Please note that all required fields apply only to institutions using the CARLI implementation of CONTENTdm. Institutions not using CARLI’s CONTENTdm may find



these documents to be useful, but are not required to follow the recommendations in their own collections. Examples in this document follow best practices; individual collections in CARLI Digital Collections may follow defined local practices instead.

Please note that additional requirements may apply for ingest into the [DPLA Illinois Digital Heritage Hub](#).

Collection

CARLI status	Required
Notes/description/details	The collection to which the resource belongs.
Common vocabularies or encoding schemes	N/A
Additional information for CARLI's CONTENTdm environment	<p>CARLI requires a field named "Collection" and requires that the Collection field be mapped to Relation - Is Part Of. This field must contain the full name of the collection to which it belongs, including the institution name in parentheses after the specific collection name, e.g., The Jack Bradley Photojournalism Collection (Bradley University).</p> <p>In the CONTENTdm Web Administration's Field Properties section, the Collection metadata field should be:</p> <ul style="list-style-type: none">• DC map: Mapped to the "Relation - Is Part Of" DCMI Metadata Term• Searchable: Yes• Hidden: No• Required: Yes
Relationship to MARC	Can be similar to 77x and 78x fields.
Usage examples	The Jack Bradley Photojournalism Collection (Bradley University) Great Lakes Digital Collection (Newberry Library) Image of Research (University of Illinois at Chicago)

Contributor

CARLI status	Optional
Notes/description/details	An entity responsible for making contributions to the content of the resource.
Common vocabularies or encoding schemes	Library of Congress Name Authority File (LCNAF) Getty Union List of Artists Names (ULAN) Virtual International Authority File (VIAF)
Additional information for CARLI's CONTENTdm environment	The Contributor will generally not be the primary author or creator. Personal names should follow the format Last Name, First Name. Corporate names are always entered in direct order.



Relationship to MARC	Similar to 700 or 710 fields.
Usage examples	Reuss, Martin Stephens, Ann S. (Ann Sophia), 1810-1886 Big Idea Productions United States. Agricultural Marketing Service.

Coverage

CARLI status	Optional
Notes/description/details	The extent or scope of the content of the resource. Usually refers to geographic coverage (spatial) or a time period (temporal).
Common vocabularies or encoding schemes	Getty Thesaurus of Geographic Names (TGN) Library of Congress Name Authority File (LCNAF) GeoNames W3C Date and Time Format
Additional information for CARLI's CONTENTdm environment	Temporal coverage is used to describe the temporal characteristics of a resource, not the date it was created. This field can be indexed as a date if the W3C Date and Time format (a profile of ISO 8601) is used.
Relationship to MARC	Similar to 043, 045, some specialized 5XX fields, 651, or 650 subfields y and z.
Usage examples	Illinois Chicago (Ill.) 1997-07-16 1860-1864

Creator

CARLI status	Recommended
Notes/description/details	A person or entity primarily responsible for making the resource.
Common vocabularies or encoding schemes	Library of Congress Name Authority File (LCNAF) Getty Union List of Artists Names (ULAN) Virtual International Authority File (VIAF)
Additional information for CARLI's CONTENTdm environment	Personal names should follow the format Last Name, First Name. Corporate names are always entered in direct order.
Relationship to MARC	Similar to 100 or 110 fields.
Usage examples	Reuss, Martin Stephens, Ann S. (Ann Sophia), 1810-1886 Big Idea Productions United States. Agricultural Marketing Service.

Date

CARLI status	Recommended
Notes/description/details	A date associated with an event in the life cycle of the resource. Best practice is to input the date in the format YYYY-MM-DD according to the W3C-DTF scheme.
Common vocabularies or encoding schemes	W3C Date and Time Format (W3C-DTF)
Additional information for CARLI's CONTENTdm environment	It is possible to create more than one local field for date in CONTENTdm. This is helpful if there are multiple dates, for example, an original publication date and a digital conversion date.
Relationship to MARC	Like the 260 subfield c, or fixed field 008/07-15.
Usage examples	1874-09-28 1967-08 1911 1860-1864

Description

CARLI status	Recommended
Notes/description/details	An account of the content of the resource, often used to provide contextual information. May include table of contents or abstract.
Common vocabularies or encoding schemes	N/A
Additional information for CARLI's CONTENTdm environment	N/A
Relationship to MARC	Similar to 5xx fields.
Usage examples	<p>Group of three young women - two seated at a typewriter.</p> <p>Streetscape view of 541 North Fairbanks Court (formerly Time-Life Building) looking to the east along Grand Avenue from Michigan Avenue. The building is clad in Cor-Ten steel; gold-tinted glass was used for the windows. The building was renovated in 1989 by Perkins & Will.</p> <p>View from a height, looking north along Michigan Ave. at night. The Allerton Hotel, the Palmolive Building and the Hotel St. Clair can be identified.</p>

Format

CARLI status	Recommended
Notes/description/details	The physical or digital manifestation of the resource. May include the physical medium, media-type, dimensions of the resource (such as size and duration), or used to determine software/hardware/equipment needed to operate the resource.
Common vocabularies or encoding schemes	Art & Architecture Thesaurus Thesaurus of Graphic Materials Internet Media Type (IMT)
Additional information for CARLI's CONTENTdm environment	N/A
Relationship to MARC	Similar to some 3xx fields, 340 subfield a, and 655.
Usage examples	photographs pictures (two-dimensional representations) image/jpeg application/pdf 300 dpi; b&w; 4 x 4 in.; 344.7 KB

Identifier

CARLI status	Recommended
Notes/description/details	An unambiguous reference to the resource within a given context.
Common vocabularies or encoding schemes	URI
Additional information for CARLI's CONTENTdm environment	Identifiers that could be used for this element include, but are not limited to, call number, bar code, file name of image, or other unique numbering scheme.
Relationship to MARC	N/A
Usage examples	001_cumae_acropolis_euboean_shore.jpg doi:10.1088/1475-7516/2009/02/007 ULUA.008.007



Language

CARLI status	Required if applicable
Notes/description/details	A language of the intellectual content of the resource. Language field is required for text and spoken word items and recommended for images containing text.
Common vocabularies or encoding schemes	ISO639-2
Additional information for CARLI's CONTENTdm environment	<p>For any text item or item with a spoken element, such as audio or video, language information must be included in the metadata.</p> <p>Such collections must contain a field for language designation, and include the three-letter language code for each item. ISO 639-2 is the required controlled vocabulary to use for language designations.</p> <p>Please be sure to use the three-letter ISO 639-2 codes and not the two-letter 639-1 codes.</p> <p>There are two options for including language designation for items:</p> <p>Display Three-Letter Language Code Only</p> <p>In this option use the Language metadata field to display only the three-letter language code. End users will see only the three-letter designation (e.g. "eng" or "ita") displayed when they view items in the collection.</p> <p>In the CONTENTdm Web Administration's Field Properties section, the Language metadata field must be:</p> <ul style="list-style-type: none">• DC Map: Mapped to the "Language" DCMI Metadata Term• Searchable: Yes• Hidden: No, unless using the optional language information formatting as described below <p>Display Full Wording of Language Designation</p> <p>If you prefer to have end users see the "pretty" version of the language designation versus the three-letter code (e.g., "English" instead of "eng"), you have the option of hiding the field with the three-letter code and using an additional field for the spelled-out word. Note that the three-letter code MUST be included in a separate field. For this option:</p> <ol style="list-style-type: none">1. An additional field, the Language Code field, will contain the ISO 639-2 three-letter language code. In CONTENTdm Web Administration this field MUST be:



	<ul style="list-style-type: none"> Field Name: Language Code (Note: if you already have created a Language field with the three-letter code you may rename that field to Language Code. This must be done first, before you create the additional Language field) DC Map: Mapped to the "Language" DCMI Metadata Term Searchable: Yes Hidden: Yes <p>2. Create a field called Language or use the Language field already provided in the CARLI Dublin Core metadata template. This field will be used for the written-out language designation. In CONTENTdm Web Administration this field MUST be:</p> <ul style="list-style-type: none"> Field Name: "Language" DC Map: Mapped to the "Language" DCMI Metadata Term Searchable: Yes Hidden: No <p>Use the Language Code field for all the three-letter ISO 639-2 codes. Use the Language field for the full lettering of the language designation.</p> <p>Example: Language Code: ita Language: Italian</p> <p>Even though the Language Code field is hidden, it is still searchable and mapped to the DCMI Metadata Term "Language." This means that end users searching with the three-letter code will return results based on the hidden field, but will see the visible field when they view individual items.</p>
Relationship to MARC	Similar to 008/35-37 and 041 fields.
Usage examples	eng English spa Spanish

Publisher

CARLI status	Optional
Notes/description/details	An entity responsible for making the resource available.
Common vocabularies or encoding schemes	Library of Congress Name Authority File (LCNAF)
Additional information for CARLI's CONTENTdm environment	Publisher names are transcribed as they appear on the resource.
Relationship to MARC	Similar to 260/264 subfield b.



Usage examples	Leo Feist, Inc. R. Knaplock [etc.] U.S. Dept. of Agriculture Education Coordinating Council University of Chicago
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Relation

CARLI status	Optional
Notes/description/details	A reference to a related resource. Like the Source field, the Relation field is often a number or other type of formal reference (URI, ISBN, etc.), though it can also be a title. Relation is used to describe things such as: a different version of the object, something the object is based on, etc.
Common vocabularies or encoding schemes	N/A
Additional information for CARLI's CONTENTdm environment	The relation field may be repeated for additional information other than collection information.
Relationship to MARC	Can be similar to 77x and 78x fields.
Usage examples for Collection field	doi:10.1037/rmh0000008 9783161484100

Rights

CARLI status	Required
Notes/description/details	Information about rights held in and over the resource. This should be a short and simple statement defining terms of use for the digitized resource.
Common vocabularies or encoding schemes	RightsStatements.org Creative Commons
Additional information for CARLI's CONTENTdm environment	<p>This field should describe the intellectual property rights owner of the digital item and, at minimum, must provide contact information (e-mail address and/or phone number) or a URL to an external webpage that contains such information for inquiries about usage. Note that the copyright holder is not necessarily the institution that provides access to the resource.</p> <p>The Rights field may also include information on acceptable uses or cases considered fair use, for example, for educational use with attribution.</p> <p>If you plan to have your collection harvested by the Digital Public Library of America (DPLA), CARLI recommends that any collections harvested by DPLA include two fields: Rights Field using only a rights statement that follows the Rightsstatements.org guidelines, and Contact Information field to provide contact information for your institution. For</p>



	<p>more information, please see Using Rightsstatements.org for DPLA Collections.</p> <p>In the CONTENTdm Web Administration's Field Properties section, the Rights metadata field should be:</p> <ul style="list-style-type: none"> • DC Map: Mapped to the "Rights" DCMI Metadata Term • Searchable: Yes • Hidden: No • Required: Yes
Relationship to MARC	Similar to 506 or 540 fields.
Usage examples	<p>In Copyright - Educational Use Permitted. This Item is protected by copyright and/or related rights. You are free to use this Item in any way that is permitted by the copyright and related rights legislation that applies to your use. In addition, no permission is required from the rights-holder(s) for educational uses. For other uses, you need to obtain permission from the rights-holder(s). http://rightsstatements.org/vocab/InC-EDU/1.0/</p> <p>Copy permitted for study or investigation purposes, citing the source Illinois Mathematics and Science Academy. Any other use requires permission. For more information please contact xxx@imsa.edu.</p> <p>All rights held by William Rainey Harper College Archives. For permission to reproduce, distribute, or otherwise use this image, please contact Firstname Lastname at xxx@harpercollege.edu.</p>

Source

CARLI status	Optional
Notes/description/details	A reference to a resource from which the present resource is derived. Source is not used to describe the nature of the relationship (see the Relation element), but to provide a pointer to the resource itself. Best practice is to use a string or a number from a formal identification system. If the digital object is a book, for example, the Source field should contain the ISBN.
Common vocabularies or encoding schemes	URI
Additional information for CARLI's CONTENTdm environment	Source information that could be used for this element includes, but is not limited to, ISBN, original URL, and accession number.
Relationship to MARC	Similar to some 0xx fields or 856 (with second indicator 0).
Usage examples	<p>978-0399254123</p> <p>http://yourlibrary.youruniversity.edu/images/buildings/1888-2.jpg</p> <p>RC607.A26W574 1996</p>



Subject

CARLI status	Recommended
Notes/description/details	The topic of the content of the resource.
Common vocabularies or encoding schemes	Library of Congress Subject Headings (LCSH) FAST Subject Headings Medical Subject Headings (MeSH) RBMS Controlled Vocabularies (Rare Books and Manuscripts) Library of Congress Name Authority File (LCNAF) Virtual International Authority File (VIAF)
Additional information for CARLI's CONTENTdm environment	Subject headings should be post-coordinated, i.e. singular terms, which allows for better search and discovery.
Relationship to MARC	Similar to 6xx fields.
Usage examples	Urban beautification Public Health Nursing Festival books Coard, Frederick McDermott, 1893-

Title

CARLI status	Required
Notes/description/details	A name given to the resource.
Common vocabularies or encoding schemes	N/A
Additional information for CARLI's CONTENTdm environment	<p>Title should be descriptive of the object. Collections using file names, accession numbers, etc. (e.g. "0010203.jpg" or "Image 1") will not be published in the CDC.</p> <p>In the CONTENTdm Web Administration's Field Properties section, the Title metadata field should be:</p> <ul style="list-style-type: none">● DC map: Mapped to the "Title" Dublin Core Metadata Initiative (DCMI) Metadata Term● Searchable: Yes● Hidden: No● Required: Yes
Relationship to MARC	Similar to 245 field.



Usage examples	Baker Dormitory, Evanston IL Acupuncture treatments Canal Wall 1930
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Type

CARLI status	Required
Notes/description/details	The nature or genre of the content of the resource.
Common vocabularies or encoding schemes	DCMI Type vocabulary
Additional information for CARLI's CONTENTdm environment	<p>This field must contain information describing the nature or genre of the content of each item within a collection. For example, if using the DCMI Type Vocabulary, items within a collection that are images would contain a type designation of "Image." Video items would have a type designation of "MovingImage."</p> <p>The Dublin Core Metadata Initiative (DCMI) Type Vocabulary is the MINIMUM required controlled vocabulary to use for this field. See a full list of all the terms within the DCMI Type Vocabulary.</p> <p>By default, for all new collections created after Jan. 4, 2010, CARLI will turn on the DCMI Type controlled vocabulary for this field; however, other standards and their associated type vocabularies are also permissible, such as VRA Core and its Cataloging Cultural Objects guidelines. If you prefer to use a standard other than the DCMI Type Vocabulary, you may disable the DCMI Type controlled vocabulary for the field.</p> <p>No matter which standard is used, in the CONTENTdm Web Administration module's Field Properties section, the type-related metadata field(s) should be:</p> <ul style="list-style-type: none"> ● DC Map: Mapped to the "Type" DCMI Metadata Term ● Searchable: Yes ● Hidden: No ● Required: Yes
Relationship to MARC	Similar to 655 field.
Usage examples	Text StillImage MovingImage

For Additional Information about Metadata and Recommended Best Practices:

Dublin Core Metadata Element Set, Version 1.1.

<https://www.dublincore.org/specifications/dublin-core/dcmi-terms/- section-3>

DCMI Metadata Terms (further information on all DCMI terms)

<http://dublincore.org/documents/dcmi-terms/>



CARLI

Consortium of
Academic and Research
Libraries in Illinois

Introduction to Metadata, from the Getty Institute

http://www.getty.edu/research/publications/electronic_publications/intrometadata/index.html

Metadata Guidelines for Collections using CONTENTdm at the University of Washington

<http://www.lib.washington.edu/msd/pubcat/mig/advice>

Best Practices for CONTENTdm and Other OAI-PMH Compliant Repositories: Creating Shareable Metadata

<https://www.oclc.org/content/dam/support/wcdigitalcollectiongateway/MetadataBestPractices.pdf>