

Section H: Metadata and Description

Metadata is structured information that describes, explains, locates, or otherwise makes it easier to retrieve, use, or manage an information resource. Metadata is often called data about data or information about information. It includes all cataloguing or indexing information created to locate, describe and manage the preservation of a resource. For example, metadata recorded for a digital image or photograph would include data about the content of the image, the photographer, the date of creation, date(s) of modification, technical information such as resolution, file type, file format, and its relationship with other related files and their locations.

Metadata can be grouped into general categories, including, but not limited to:

- **Administrative metadata** provides information to help manage a resource, such as when and how it was created, file type and other technical information, and who can access it. There are several subsets of administrative data; two that sometimes are listed as separate metadata types are:
 - *Rights management metadata*, which deals with intellectual property rights,
 - *Preservation metadata*, which contains information needed to archive and preserve a resource.
- **Descriptive metadata** describes a resource for purposes such as discovery and identification. It can include elements such as title, abstract, author, and keywords. For digital resources, descriptive metadata is the information used for the indexing, discovery and identification of a resource.
- **Structural metadata** indicates how compound objects are put together, for example, how pages are ordered to form chapters. For digital resources, structural metadata is the information used to display and navigate digital resources; information on the internal organization of the digital resource; information on viewer or reader plug-in needed to open the digital resource.

Each institution will have different needs in terms of metadata and the standards and scheme they choose to use will depend heavily on the intended use.

H1: METADATA BEST PRACTICES AND GUIDES

Introduction to Metadata, Online Edition, Version 3.0, 2016 (Edited by Murtha Baca)

URL: <http://www.getty.edu/publications/intrometadata/> Last access: January 12, 2018.

An online publication devoted to metadata, its types and uses, and how it can improve access to digital resources.

Metadata Best Practices Version 1.0, September 2009 (University of Colorado Digital Library)

URL: <https://www.cu.edu/digitallibrary/cudlmetadatabp.pdf> Last access: January 12, 2018.

This document offers an introduction to metadata, provides links to resources containing more information, and describes the required and recommended elements for collections in the CU Digital Library.

Metadata Entry Guidelines, July 2017 (Minnesota Digital Library)

URL: <https://mndigital.org/standards-best-practices/minnesota-reflections-metadata-entry-guidelines> Last access: January 12, 2018.

The Minnesota Reflections Metadata Entry Guidelines provide organizations contributing collections to Minnesota Reflections with detailed information and assistance on completing the data entry process of their projects. They are an example that other organizations can reference and build upon.

RLG Best Practice Guidelines for Encoded Archival Description, 2002 (Research Libraries Group)

URL: <http://www.oclc.org/research/activities/past/rlg/ead/bpg.pdf> Last access: February 13, 2012.

This set of guidelines intends to facilitate interoperability of resource discovery, offer researchers the full benefits of XML in retrieval and display, and contribute to the evolution of EAD standard.

Understanding Metadata: What is Metadata, and What is it For?: A Primer, 2017 (NISO)

URL: http://groups.niso.org/apps/group_public/download.php/17446/Understanding%20Met%E2%80%A6 Last access: January 12, 2018.

This is an introduction to metadata, metadata standards and creation of metadata.

H2: METADATA STANDARDS

Dublin Core Metadata Element Set, Version 1.1: Reference Description, 2016

URL: <http://dublincore.org/documentsdces/> Last access: January 12, 2018.

The Dublin Core Metadata Initiative is an open organization engaged in the development of interoperable metadata standards that support a broad range of purposes and business models.

Encoded Archival Description (EAD)

URL: <http://www.loc.gov/ead/> Last access: January 12, 2018.

The EAD Document Type Definition (DTD) is a standard for encoding archival finding aids using Extensible Markup Language (XML). The standard is maintained in the Network Development and MARC Standards Office of the Library of Congress in partnership with the Society of American Archivists.

ISO 23081-1:2017 (International Organization for Standardization)

URL: <https://www.iso.org/standard/73172.html> Last access: January 12, 2018.

ISO 23081-1:2017 covers the principles that underpin and govern records management metadata.

Metadata Authority Description Standard (MADS)

URL: <http://www.loc.gov/standards/mads/> Last access: January 12, 2018.

MADS is a MARC21-compatible XML format for the type of data carried in records in the MARC Authorities format (people, organizations, events, topics, genres, etc.). MADS serves as a companion to MODS to provide metadata about the authoritative entities used in MODS descriptions.

Metadata Encoding & Transmission Standard (METS)

URL: <http://www.loc.gov/standards/mets/> Last access: January 12, 2018.

The METS schema is a standard for encoding descriptive, administrative, and structural metadata regarding objects within a digital library, expressed using the XML schema language of the W3C.

Metadata for Digital Content (MDC)

URL: <http://www.loc.gov/standards/mdc/> Last access: January 12, 2018.

The MDC group is documenting metadata profiles for different digital library projects/initiatives which draw from the master list to provide consistency for metadata usage throughout the institution, to support the metadata use cases, and to point to areas where metadata remediation might be beneficial.

Metadata Object Description Standard (MODS)

URL: <http://www.loc.gov/standards/mods/> Last access: January 12, 2018.

MODS is a schema for a bibliographic element set that may be used for a variety of purposes, and particularly for library applications. As an XML schema it is intended to be able to carry selected data from existing MARC 21 records as well as to enable the creation of original resource description records. The standard is maintained by the Network Development and MARC Standards Office of the Library of Congress with input from users.

Open Archives Initiative – Protocol for Metadata Harvesting and Object Reuse and Exchange

URL: <http://www.openarchives.org/> Last access: January 12, 2018.

OAI develops and promotes interoperability standards that aim to facilitate the efficient dissemination of content.

Preservation Metadata (PREMIS)

URL: <http://www.loc.gov/standards/premis/> Last access: January 12, 2018.

PREMIS data dictionary was developed with the goal of creating an implementable set of core preservation metadata elements, with broad applicability within the digital preservation community.

H3: FIRST NATIONS CONTROLLED VOCABULARY

BC First Nations Subject Headings, 2009 (Xwi7xwa Library, First Nations House of Learning)

URL: <http://xwi7xwa.library.ubc.ca/files/2011/09/bcfn.pdf> Last access: January 12, 2018.

A working document from the Xwi7xwa Library, University of British Columbia that combines Xwi7xwa, Library of Congress, and other subject headings.

Ngā Ūpoko Tukutuku | Maori Subject Headings, 2017 (LIANZA, Te Rōpū Whakahau, and the National Library of New Zealand)

URL: <http://natlib.govt.nz/nga-upoko-tukutuku> Last access: January 12, 2018.

Ngā Ūpoko Tukutuku has been developed as part of the Māori Subject Headings Project jointly sponsored by LIANZA, Te Rōpū Whakahau and the National Library of New Zealand. The list of over 1,000 headings and their associated references is appropriate for use at a public library level. As more terms are developed they will be added to the list.

Pathways: AIATIS Thesauri, 2010 (Australian Institute of Aboriginal and Torres Strait Islander Studies)

URL: <http://www1.aiatsis.gov.au/thesaurus/> Last access: January 12, 2018.

Pathways contains headings for place names, language groups and people, and subjects relating to Australian Aboriginal and Torres Strait Islander studies. These headings are used to describe all items held in the AIATIS Catalog.

Words First: An Evolving Terminology Relating to Aboriginal Peoples in Canada, 2002 (Indian and Northern Affairs Canada)

URL: <http://publications.gc.ca/site/eng/264091/publication.html> Last access: January 12, 2018.

The purpose of *Words First: An Evolving Terminology Relating to Aboriginal Peoples in Canada* is to provide writers with background information and guidance on appropriate word usage and style issues.

H4: SAMPLE METADATA TEMPLATE

NOTE: This sample metadata template is based on the Dublin Core metadata schema.¹

Field name	Dublin Core mapping	Controlled vocabulary	Notes
title	title		Transcribe from item whenever possible. If supplying a title, use square brackets.
alternate title	title		Use for a supplied title when the transcribed title in title field is not descriptive; or for a title in another language.
creator	creator		Format should be last name, first name.
contributor	contributor		An entity responsible for making contributions to the resource.
publisher	publisher		Use only if the digital item represents the entire published work.
identifier OR image id OR accession number	identifier		In general, this field is used to indicate the physical location of the item (ex. call number, image number, box and folder number).
description	description		Provide a short description of the resource.
subject [optional]	subject	Thesaurus for Graphic Material (TGM) http://lcweb2.loc.gov/pp/tgmhtml/tgmabt.html	Use either the broader or narrower term, not both. i.e. choose between Families and Adults, Children, etc. If the item is generally representing one concept, choose the narrower; if the item is generally representing many concepts, choose the broader. Follow TGM rules for place (country, city, etc) facets. Use the names of ethnic groups only with TGM subdivisions in Appendix A.

¹ Adapted from metadata template used at UBC Library's Digital Initiatives Unit: <http://diginit.library.ubc.ca/>

			<p>Maximum five terms per item; minimum one; preferably 1 or 2.</p> <p>Try to restrict choice of terms to only what is represented in the item itself.</p> <p>Use Canadian spellings (i.e. colour, labour, etc.)</p>
subject - geographic	coverage-spatial	<p>Canadian Geographical Names: http://www.nrcan.gc.ca/earth-sciences/geography/place-names/10786</p> <p>US Geographical Names: http://geonames.usgs.gov/</p>	Use to indicate locations depicted (for maps or views).
personal names	subject		Use for "important" people, or (optionally) for people who appear as the subject of personal correspondence or are depicted in portraits.
genre	type	<p>Library of Congress Basic Genre Terms for Cultural Heritage Materials http://memory.loc.gov/ammem/techdocs/genre.html</p>	The genre of the resource.
date	date	YYYY-MM-DD	If you want to add the day, this can be included in the description. If the date is a range, use the earliest in the date field. Use format YYYY-MM-DD. If specific date of creation is needed, please include in description field.
language	language		Use natural language rather than MARC or ISO codes .
digital content type	type	<p>DCMI type vocabulary: http://dublincore.org/documents/dcmi-type-vocabulary/</p>	The nature of the resource.
digital image format	format	<p>IANA MIME Media Types vocabulary: http://www.iana.org/ass</p>	The file format, physical medium, or dimensions of the resource.

		gments/media-types/index.html	
forms part of	relation		Use formal collection name from fonds record .
repository	source		A related resource from which the described resource is derived.
rights	rights	Images provided for research and reference use only. Permission to publish, copy, or otherwise use these images must be obtained from [insert collection holder and URL/email].	Information about rights held in and over the resource. Can also include URL to Creative Commons Licence.
project website	relation		URL for project homepage.