

Metadata for Digital Resources at the Congregational Library & Archives

By Zachary Bodnar

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Introduction

On October 19, 2020, after a lengthy discovery and research process, the Board of the Congregational Library & Archives (CLA) approved a proposal, offered jointly by the staff and directors of the CLA, to purchase and implement the Digital Asset Management System (DAMS) Quartex, an Adam Mathew Digital product. Subsequently the CLA signed a licensing agreement with Adam Mathew Digital on November 6, 2020, officially kicking off the CLA's involvement with Quartex. By licensing this product, the CLA ensured that its digital content, both born digital and reformatted, could be made truly accessible, via the internet, to a wider audience than ever before while providing new tools to the CLA's users and forging new paths for outreach and engagement with the CLA's community.

This document was created in direct response to the decision to move forward with Quarters and in preparation for the eventual migration of digital resources to the Quartex platform. At the heart of Quartex, and digital access, is metadata, and to ensure uniformity across thousands of digital resources, a single document detailing the metadata model used by the CLA for digital content was deemed necessary.

As with all documentation, the contents of this document are subject to change. Please refer to the version history section at the end of the document to see how this document has changed over time.

A Metadata Model for Digital Resources

This section details the standardized metadata model employed by the CLA for all its digital resources. The metadata model provides a standard set of metadata facets which, when taken together, offer a comprehensive description of any given digital resource.

History of the Model

An initial version of this model was created in the summer of 2020 during the RFP process of our search for a new digital asset management system. This initial model was sent alongside of our RFP materials and was intended to help guide vendors through their demo presentations while also establishing the kinds of metadata the CLA wished to collect and display. This version of the model is maintained in the document "A Metadata Model for the Congregational Library & Archives".

A minor revision of this model was created shortly after the CLA had selected Quartex as its number one choice in the fall of 2020. This revised model was used in the creation of an initial demo meant to demonstrate the usefulness and power of Quartex and considered both the limitations and flexibility inherent in Quartex's system.

A second major version of the model was created in the winter of 2020. This version was created as part of a pilot processing project whereby one large digital collection would be described using the model to determine what, if any, changes would need to be made to the model before moving forward on the migration of NEHH resources into the Quartex environment. This version of the metadata model is maintained in the document "Metadata for Digital Resources CLA - Quartex Rev"

This final version of the model was created following the pilot project and includes numerous changes, many small and some large, that were recommended and implanted. All future revisions of the model will be recorded and maintained in this document with changes recorded in the “Version History” section at the end of this document.

Metadata Sources

The metadata fields presented in this document are drawn primarily from metadata models created specifically for libraries, archives, and museums which handle and preserve digital resources. The following four metadata models were used as reference during the creation of this document.

- 1) [Dublin Core](#) (DCMI): A flexible and widely used descriptive metadata model which includes fields for the description of digital objects and fields for defining relationships between digital objects. It is designed for use with linked metadata. Dublin Core is maintained by the Dublin Core™ Metadata Initiative.
- 2) [Metadata Object Description Schema](#) (MODS): A powerful descriptive metadata model which was designed for use by libraries creating bibliographic metadata for digital objects within library systems. MODS is maintained by the Network Development and MARC Standards Office of the Library of Congress.
- 3) [Metadata Encoding and Transmission Standard](#) (METS): A metadata schema designed primarily as a method for encoding structural information about a digital object, especially one which includes multiple files, within a digital library environment. METS also includes fields for description about the digital file itself. METS is maintained by the Network Development and MARC Standards Office of the Library of Congress.
- 4) [Preservation Metadata Maintenance Activity](#) (PREMIS): An international metadata standard designed primarily for the collection of preservation metadata to ensure the long-term usability of digital objects found within library systems. PREMIS records “events” that occur during the lifecycle of a digital object. PREMIS is maintained by the Network Development and MARC Standards Office of the Library of Congress.
- 5) [MARC Standards](#): Maintained by the Library of Congress, MARC has been the dominant bibliographic content standard used by librarians and library systems for nearly 50 years. MARC is used here to replicate bibliographic fields for print materials which are not already replicated in any of the above listed metadata sources.

Metadata Field Template

Metadata Title

Description:

Example:

Linked Standards:

Field Label:	
Field Type:	

Required Field:	
Indexable:	
Repeatable:	
Metadata Grouping:	
Content Standard:	

Restricted Formatting:	
Format:	

Limited Vocabulary:	
Vocabulary Source:	
Vocabulary Terms:	

Template Field Descriptions

Metadata Title: This is the name assigned to the metadata field by the CLA for internal use and discussion. This title is often drawn from one of the above metadata schemas. This name may be different from the metadata label displayed to the end-user and used within Quartex.

Description: A brief and clear description of the type of information that the metadata field is intended to display.

Example: A real-world example of the textual information collected within a metadata field using metadata drawn from the CLA’s digital collections.

Linked Standards: A list of metadata standards which were used as models for the metadata field as well as crosslinks to specific elements within those standards that correspond to the metadata field.

Field Label: This is the display name of the metadata field and corresponds to what the end-user sees when looking at an asset within the system.

Field Type: One of four options which determine the type of content allowed within a field within Quartex. The available options are “Free Text”, “Date”, “Controlled Vocabulary”, and “Related Assets”.

Required Field: A “Yes/No” statement that signifies if the field is required for a resource to be published and available to external users.

Indexable: A “Yes/No” statement that signifies if the field should be made visible to the end-user on the public portal and indexed for search results.

Repeatable: A “Yes/No” statement that signifies if multiple, separate, values may exist within the metadata field. Metadata recorded in spreadsheets will be separated by semicolons.

Metadata Grouping: A statement indicating which “group” of metadata fields the metadata field belongs to within the Quartex System. Currently there are three groups.

- **Standard Metadata:** This is the basic set of metadata fields that will be applied to every asset in Quartex.
- **Digitization Metadata:** This is a small subset of metadata fields which may be applied to reformatted digital resources. This group of metadata collects information about the reformatting process itself.
- **Bibliographic Metadata:** This is a subset of metadata fields which may be applied to digital print materials. This group of metadata is largely based on MARC fields which are useful for bibliographic description but not otherwise covered by the standard fields.

Content Standard: A list of standards, if any, which govern how metadata should be collected/displayed within the field. Primarily intended for internal use.

Restricted Formatting: A “Yes/No” statement that signifies if the system should restrict the formatting of the metadata field to ensure compliance with content standards.

Format: Either a textual example or brief description of how the system should restrict the formatting of the field.

Limited Vocabulary: A “Yes/No” statements that signifies if the system should limit the field’s input to a small set of pre-approved terms, such as through a drop-down menu.

Vocabulary Source: The source or standard from which the list of pre-approved terms was derived.

Vocabulary Terms: The complete list of pre-approved terms for the metadata field.

Metadata Fields

For ease of organization, the following metadata fields have been listed in alphabetical order.

Camera

Description: The make/model of the camera used in the creation of the digital resource

Example: Nikon D3000

Field Label:	Camera Model
Field Type:	Controlled Vocabulary
Required Field:	No
Indexable:	Yes
Repeatable:	No
Metadata Grouping:	Digitization Metadata
Content Standard:	NA

Restricted Formatting:	No
Format:	NA

Limited Vocabulary:	No
Vocabulary Source:	NA


Vocabulary Terms:	NA
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Collection

Description: The title of an archival collection, digital or physical, that a digital resource belongs to.

Example: Brunswick, Me. First Parish Church records,1735-1829.

Linked Standards:

 DCMI: [source](#)

 MODS 3.7: [part](#)

Field Label:	Collection
Field Type:	Controlled Vocabulary
Required Field:	No
Indexable:	Yes
Repeatable:	No
Metadata Grouping:	Standard Metadata
Content Standard:	DACS 2.3 , DACS 2.4

Restricted Formatting:	No
Format:	NA

Limited Vocabulary:	No
Vocabulary Source:	NA
Vocabulary Terms:	NA

Citation

Description: An unambiguous citation for the resource for use by third parties.

Example: Journal, 1754-1756, in the Gideon Hawley missionary journals, 1753-1806, MS1237. The Congregational Library & Archives, Boston, MA.

Linked Standards:

 DCMI: [bibliographicCitation](#)

Field Label:	Citation
Field Type:	Free Text
Required Field:	No
Indexable:	Yes
Repeatable:	No
Metadata Grouping:	Standard Metadata
Content Standard:	NA

Restricted Formatting:	No
Format:	NA


Limited Vocabulary:	No
Vocabulary Source:	NA
Vocabulary Terms:	NA


☐ Contributor


Description: Persons, families, and/or corporate entities responsible for the creation of a reformatted digital resource.

Example: Digital Ark (Digitization vendor)

Linked Standards:

 DDCMI: [contributor](#)

 MODS 3.7: [name](#)

 METS 1.12.1: [/agent](#)

Field Label:	Contributors
Field Type:	Controlled Vocabulary
Required Field:	No
Indexable:	Yes
Repeatable:	Yes
Metadata Grouping:	Digitization Metadata
Content Standard:	LCNAF , RDA + local/marc relator term

Restricted Formatting:	No
Format:	NA


Limited Vocabulary:	No
Vocabulary Source:	NA
Vocabulary Terms:	NA

☐ Coverage

Description: The geographic location, or locations, associated with a resource.

Example: Natick (Mass.)

Linked Standards:

 DDCMI: [coverage](#)

Field Label:	Geographic Coverage
Field Type:	Controlled Vocabulary

Required Field:	No
Indexable:	Yes
Repeatable:	Yes
Metadata Grouping:	Standard Metadata
Content Standard:	LCNAF

Restricted Formatting:	No
Format:	NA

Limited Vocabulary:	No
Vocabulary Source:	NA
Vocabulary Terms:	NA


Creator


Description: Persons, families, and/or corporate entities responsible for the creation of the resource.

Example: Hawley, Gideon, 1727-1807

Linked Standards:

 DCMI: [creator](#)

 MODS 3.7: [name](#)

 METS 1.12.1: [/agent](#)

Field Label:	Creator
Field Type	Controlled Vocabulary
Required Field:	Yes
Indexable:	Yes
Repeatable:	Yes
Metadata Category:	Standard Metadata
Content Standard:	LCNAF , RDA

Restricted Formatting:	No
Format:	NA

Limited Vocabulary:	No
Vocabulary Source:	NA
Vocabulary Terms:	NA

☐ Date

Description: The date(s) that pertain to the creation of the resource.

Example: 1754-1756

Linked Standards:

 DCMI: [date](#)

 MODS 3.7: [originInformation](#)

Field Label:	Date
Field Type:	Date
Required Field:	Yes
Indexable:	Yes
Repeatable:	No
Metadata Grouping:	Standard Metadata
Content Standard:	DACS 2.4

Restricted Formatting:	No
Format Standard:	NA


Limited Vocabulary:	No
Vocabulary Source:	NA
Vocabulary Terms:	NA

☐ Date Created


Description: The date that the digital file was created and/or last edited.

Example: 2020-02-06

Linked Standards:

 DCMI: [created](#)

 MODS 3.7: [originInfo/dateCreated](#)

 PREMIS 3.0: objectCharacteristics

Field Label:	Date of Reformatting
Field Type:	Date
Required Field:	No
Indexable:	Yes
Repeatable:	No
Metadata Grouping:	Digitization Metadata
Content Standard:	ISO 8601-1

Restricted Formatting:	Yes
Format:	YYYY-MM-DD


Limited Vocabulary:	No
Vocabulary Source:	NA
Vocabulary Terms:	NA

Edition

Description: An edition statement for published print materials

Example: 2nd ed.

Linked Standards:

 MARC: [250](#)

Field Label:	Edition
Field Type:	Free Text
Required Field:	No
Indexable:	Yes
Repeatable:	No
Metadata Grouping:	Bibliographic Metadata
Content Standard:	RDA

Restricted Formatting:	No
Format:	NA


Limited Vocabulary:	No
Vocabulary Source:	NA
Vocabulary Terms:	NA

Extant

Description: A measure of the size, duration, or amount of the digital resource.

Example: 135 images

Linked Standards:

 DCMI: [extant](#)

Field Label:	Extant
Field Type:	Free Text
Required Field:	Yes
Indexable:	Yes
Repeatable:	No
Metadata Grouping:	Standard Metadata
Content Standard:	NA

Restricted Formatting:	No
Format:	NA

Limited Vocabulary:	No
Vocabulary Source:	NA
Vocabulary Terms:	NA

External Record

Description: A link to an external record, such as a catalog record, finding aid, or similar records. Always point to permalink, if possible.

Example: [View associated finding aid.](#)

Linked Standards:

 DCMI: [isReferencedBy](#)

Field Label:	External Reference
Field Type:	Free Text
Required Field:	No
Indexable:	Yes
Repeatable:	Yes
Metadata Grouping:	Standard Metadata
Content Standard:	NA

Restricted Formatting:	No
Format:	NA


Limited Vocabulary:	Yes
Vocabulary Source:	Local
Vocabulary Terms:	View associated finding aid; View associated catalog record

Format

Description: The MIME type of the digital file.

Example: image/tiff

Linked Standards:

 DCMI: [format](#)

 MODS 3.7: [physicalDescription/internetMediaType](#)

Field Label:	File Format
Field Type:	Controlled Vocabulary

Required Field:	Yes
Indexable:	Yes
Repeatable:	No
Metadata Grouping:	Standard Metadata
Content Standard:	IANA

Restricted Formatting:	Yes
Format:	Please use the full two-part Internet Media Type listed by IANA

Limited Vocabulary:	No
Vocabulary Source:	NA
Vocabulary Terms:	NA

☐ Genre/Form

Description: The characteristics of the digital resource with a particular format and/or purpose.

Example: Negatives (Photographs)

Linked Standards:

 MODS 3.7: [genre](#)

Field Label:	Genre/Form
Field Type	Controlled Vocabulary
Required Field:	No
Indexable:	Yes
Repeatable:	Yes
Metadata Grouping:	Standard Metadata
Content Standard:	LCGFT

Restricted Formatting:	No
Format:	NA


Limited Vocabulary:	No
Vocabulary Source:	NA
Vocabulary Terms:	NA

☐ Identifier

Description: An unambiguous reference to the resource within the system.

Example: <https://ark.digitalcommonwealth.org/ark:/50959/n870zx124>

Linked Standards:

 DDCMI: [identifier](#)

 MODS 3.7: [identifier](#)

Field Label:	Permalink
Field Type:	Free Text
Required Field:	Yes
Indexable:	Yes
Repeatable:	No
Metadata Grouping:	Standard Metadata
Content Standard:	NA

Restricted Formatting:	Yes
Format:	URI

Limited Vocabulary:	No
Vocabulary Source:	NA
Vocabulary Terms:	NA

 **Imprint**

Description: A statement on providing information on the publication of a published print work.

Example: Amherst, N.Y.: Prometheus Books (19), 2002

Linked Standards:

 MARC: [260](#)

Field Label:	Imprint
Field Type:	Free Text
Required Field:	No
Indexable:	Yes
Repeatable:	No
Metadata Grouping:	Bibliographic Metadata
Content Standard:	NA

Restricted Formatting:	No
Format:	NA

Limited Vocabulary:	No
Vocabulary Source:	NA
Vocabulary Terms:	NA


Language

Description: A list of the languages, if any, found within the resource.

Example: English

Linked Standards:

 DCMI: [language](#)

 MODS 3.7: [language](#)

Field Label:	Language
Field Type:	Controlled Vocabulary
Required Field:	No
Indexable:	Yes
Repeatable:	Yes
Metadata Grouping:	Standard Metadata
Content Standard:	ISO 639-2 , ISO 639-5

Restricted Formatting:	Yes
Format:	Please use the full “English name of the Language” column from ISO 639-2 to craft vocab terms.


Limited Vocabulary:	No
Vocabulary Source:	NA
Vocabulary Terms:	NA

Local Item/Call Number

Description: A local reference number or call number associated with the digital resource.

Example: RG0049

Linked Standards:

 MODS 3.7: [classification](#)

Field Label:	Reference Number
Field Type:	Free Text
Required Field:	Yes
Indexable:	Yes
Repeatable:	No
Metadata Grouping:	Standard Metadata
Content Standard:	NA

Restricted Formatting:	No
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Format:	NA
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Limited Vocabulary:	No
Vocabulary Source:	NA
Vocabulary Terms:	NA


Location of Original

Description: The name of the corporate entity, person, or family which holds the original or physical version of a digital the digital resource. The CLA will be using this field to make a clear ownership statement

Example: American Antiquarian Society

Linked Standards:

 DCMI: [Location](#)

 MODS 3.7: [location](#)

Field Label:	Source
Field Type:	Controlled Vocabulary
Required Field:	Yes
Indexable:	Yes
Repeatable:	No
Metadata Grouping:	Standard Metadata
Content Standard:	RDA

Restricted Formatting:	No
Format:	NA

Limited Vocabulary:	No
Vocabulary Source:	NA
Vocabulary Terms:	NA

Origination

Description: A term that describes the origin of the digital file.

Example: Born digital

Linked Standards:

 MODS 3.7: [physicalDescription/digitalOrigin](#)

Field Label:	Origination
Field Type:	Controlled Vocabulary
Required Field:	Yes

Indexable:	Yes
Repeatable:	No
Metadata Grouping:	Standard Metadata
Content Standard:	NA

Restricted Formatting:	No
Format:	NA


Limited Vocabulary:	Yes
Vocabulary Source:	MODS 3.7
Vocabulary Terms:	Born digital, Reformatted digital, Digitized microfilm, Digitized other analog

□□ Provenance

Description: A statement of any changes in ownership and custody of the resource since its creation that are significant for its authenticity, integrity, and interpretation.

Example: Church materials compiled and organized by the Southern New England Conference, UCC, prior to their transfer to the Congregational Library & Archives.

Linked Standards:

 DCMI: [provenance](#)

Field Label:	Custodial History
Field Type:	Free Text
Required Field:	No
Indexable:	Yes
Repeatable:	No
Metadata Grouping:	Standard Metadata
Content Standard:	DACS 5.1

Restricted Formatting:	No
Format:	NA

Limited Vocabulary:	No
Vocabulary Source:	NA
Vocabulary Terms:	NA

□□ Reformatting Quality

Description: A statement indicating the type of digitization undertaken.

Example: Preservation.

Linked Standards:

 MODS 3.7: [physicalDescription/reformattingQuality](#)

Field Label:	Reformatting Type
Field Type:	Controlled Vocabulary
Required Field:	No
Indexable:	Yes
Repeatable:	No
Metadata Grouping:	Standard Metadata
Content Standard:	NA

Restricted Formatting:	No
Format:	NA


Limited Vocabulary:	Yes
Vocabulary Source:	MODS
Vocabulary Terms:	Access, Preservation, Replacement


 **Related**

Description: A related resource.

Example: Barnard, Edward. Sermons, 1739-1774

Linked Standards:

 DCMI: [relation](#)

 MODS 3.7: [relatedItem](#)

Field Label:	Related Resources
Field Type:	Related Assets
Required Field:	No
Indexable:	Yes
Repeatable:	Yes
Metadata Grouping:	Standard Metadata
Content Standard:	DACS 2.3 , DACS 2.4

Restricted Formatting:	No
Format:	NA




Limited Vocabulary:	No
Vocabulary Source:	NA
Vocabulary Terms:	NA

□ Rights Statement

Description: A statement or license which determines how the digital object may be used by third parties.

Example: <https://rightsstatements.org/page/InC-EDU/1.0/?language=en>

Linked Standards:

-  DCMI: [License](#)
-  METS 1.12.1: [rightsMD](#)
-  PREMIS 3.0: [rightsStatement](#)

Field Label:	Rights Statement
Field Type:	Free Text
Required Field:	Yes
Indexable:	Yes
Repeatable:	No
Metadata Grouping:	Standard Metadata
Content Standard:	NA

Restricted Formatting:	No
Format:	NA



Limited Vocabulary:	Yes
Vocabulary Source:	RightsStatements.org
Vocabulary Terms:	In Copyright , In Copyright – Educational Use Permitted , In Copyright – Non-Commercial Use Permitted , In Copyright – Rights-Holder(s) Unlocatable or Unidentifiable , No Copyright – Contractual Restrictions , No Copyright – Non-Commercial Use Only , No Copyright – Other Known Legal Restrictions , No Copyright – United States , Copyright Not Evaluated , Copyright Undetermined , No Known Copyright

□ Scope and Content

Description: A description about the nature of the resource and activities reflected in the unit.

Example: The first volume chronicles Rev. Hawley's time as a missionary traveling through "the Country of the Six Nations" — what is now western New York and Pennsylvania, that were still largely populated by Native American tribes. Rev. Hawley kept track of the villages he visited, people he interacted with, and the Bible passages on which he preached.

Linked Standards:

-  DCMI: [description](#)
-  MODS 3.7: [abstract](#)

Field Label:	Description
Field Type:	Free Text

Required Field:	Yes
Indexable:	Yes
Repeatable:	No
Metadata Grouping:	Standard Metadata
Content Standard:	DACS 3.1

Restricted Formatting:	No
Format:	NA

Limited Vocabulary:	No
Vocabulary Source:	NA
Vocabulary Terms:	NA


Series

Description: The name of the series or project that a digital resource belongs to.

Example: New England's Hidden Histories

Linked Standards:

 DCMI: [isPartOf](#)

 MODS 3.7: [part](#)

Field Label:	Series
Field Type:	Controlled Vocabulary
Required Field:	No
Indexable:	Yes
Repeatable:	Yes
Metadata Grouping:	Standard Metadata
Content Standard:	NA

Restricted Formatting:	No
Format:	NA

Limited Vocabulary:	No
Vocabulary Source:	NA
Vocabulary Terms:	NA

Sponsor

Description: The name of the sponsor, such as a granting institution, which allowed for the creation of a digital resource.

Example: Council on Library and Information Resources (CLIR)

Linked Standards:

Field Label:	Sponsor
Field Type:	Controlled Vocabulary
Required Field:	No
Indexable:	Yes
Repeatable:	No
Metadata Grouping:	Standard Metadata
Content Standard:	NA

Restricted Formatting:	No
Format:	NA

Limited Vocabulary:	No
Vocabulary Source:	NA
Vocabulary Terms:	NA


□ Subject

Description: Topical, or name terms that describe the resource. (Can be expanded to include Geographic terms but this is not preferred.)

Example: Missionaries -- Biography

Linked Standards:

 DCMI: [subject](#), ([coverage](#))

 MODS 3.7: [subject](#)

Field Label:	Subjects
Field Type:	Controlled Vocabulary
Required Field:	No
Indexable:	Yes
Repeatable:	Yes
Metadata Grouping:	Standard Metadata
Content Standard:	LCSH

Restricted Formatting:	No
Format:	NA

Limited Vocabulary:	No
Vocabulary Source:	NA

Vocabulary Terms:	NA
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□□ Title

Description: The name given to a digital resource.

Example: Gideon Hawley journal and letterbook, 1754-1756

Linked Standards:

 DCMI: [title](#)

 MODS 3.7: [titleInfo](#)

Field Label:	Title
Field Type:	Free Text
Required Field:	Yes
Indexable:	Yes
Repeatable:	No
Metadata Grouping:	Standard Metadata
Content Standard:	DACS 2.3 , DACS 2.4

Restricted Formatting:	No
Format Standard:	NA

Limited Vocabulary:	No
Vocabulary Source:	NA
Vocabulary Terms:	NA

□□ Type

Description: Term that describes the nature of the digital resource.

Example:

Linked Standards:

 DCMI: [type](#)

 MODS 3.7: [typeOfResource](#)

Field Label:	Type
Field Type:	Controlled Vocabulary
Required Field:	Yes
Indexable:	Yes
Repeatable:	No
Metadata Grouping:	Standard Metadata
Content Standard:	NA

Restricted Formatting:	No
Format:	NA

Limited Vocabulary:	Yes
Vocabulary Source:	DCMI Type Vocabulary
Vocabulary Terms:	Collection, Dataset, Event, Image, Interactive Resource, Moving Image, Physical Object, Service, Software, Sound, Still Image, Text

Vocabulary Term Descriptions

Several metadata fields have defined vocabulary terms with precise definitions attached to each term. To ensure uniformity when cataloging, each of these terms have been properly defined below.

External Record

- **View associated finding aid:** Use this term when linking out to an external finding aid for manuscript and archival digital materials which are part of an archival collection. When possible, link directly to the actual finding aid document (for example, the pdf) rather than a page which further links to a finding aid.
- **View associated catalog record:** Use this term when linking out to an external catalog record from an OPAC. Use this for bibliographic materials or for archival collections that have a catalog record but not a published finding aid.

Origination

- **Born digital:** This term indicates that the digital object was created entirely through digital means; there is no physical “original” of the object.
- **Reformatted digital:** This term indicates that the digital object was digitized; there is a physical “original” from which the digital object originated.
- **Digitized microfilm:** This term indicates that the digital object is a derivative of microfilm making it two-steps removed from the physical “original”.
- **Digitized other analog:** This term indicates that the digital object is a derivative of another derivative medium that is not microfilm. Again, this term indicates that the digital object is two-steps removed from the physical “original”.

Reformatting Quality

- **Access:** This term indicates that the digital object is not a digital surrogate, meaning the digital object is a one-to-one representation of the physical “original”. This term does not indicate poor quality; access quality digital objects can still be high quality representations but may not be used as a true surrogate for the original.
- **Preservation:** This term indicated that the digital object is a true digital surrogate that adheres to at least the third level of FADGI digitization standards.

- **Replacement:** This term indicated that the digital object is a true digital surrogate that adheres to at least the third level of FADGI digitization standards and that the digital object now supersedes the physical “original”. Likely, the physical original has either been destroyed or is actively decaying so that its condition is worse than the digital object’s.

Rights Statement

Please visit the [RightsStatements.org](https://rightsstatements.org/en/) for detailed information on each of these rights statement terms: <https://rightsstatements.org/en/>

Type

These definitions have been pulled directly from the [DCMI](#).

- **Collection:** A collection is an aggregation of items. The term collection means that the resource is described as a group; its parts may be separately described and navigated. The use of “Collection” at the CLA will be limited, if used at all.
- **Dataset:** A dataset is information encoded in a defined structure (for example, lists, tables, and databases), intended to be useful for direct machine processing.
- **Event:** An event is a non-persistent, time-based occurrence. Metadata for an event provides descriptive information that is the basis for discovery of the purpose, location, duration, responsible agents, and links to related events and resources. The resource of type event may not be retrievable if the described instantiation has expired or is yet to occur. Examples - exhibition, web-cast, conference, workshop, open-day, performance, battle, trial, wedding, tea-party, conflagration. The use of “Event” at the CLA will be limited, if used at all.
- **Image:** An image is a primarily symbolic visual representation other than text. For example - images and photographs of physical objects, paintings, prints, drawings, other images and graphics, animations and moving pictures, film, diagrams, maps, musical notation. Note that image may include both electronic and physical representations.
- **Interactive Resource:** An interactive resource is a resource which requires interaction from the user to be understood, executed, or experienced. For example - forms on web pages, applets, multimedia learning objects, chat services, virtual reality.
- **Moving Image:** A series of visual representations imparting an impression of motion when shown in succession. Examples include animations, movies, television programs, videos, zoetropes, or visual output from a simulation. Instances of the type Moving Image must also be describable as instances of the broader type Image.
- **Physical Object:** An inanimate, three-dimensional object or substance. For example -- a computer, the great pyramid, a sculpture. Note that digital representations of, or surrogates for, these things should use Image, Text or one of the other types. The use of “Physical Object” at the CLA will be limited, if used at all.
- **Service:** A service is a system that provides one or more functions of value to the end-user. Examples include: a photocopying service, a banking service, an authentication service, interlibrary loans, a Z39.50 or Web server. The use of “Service” at the CLA will be limited, if used at all.

- **Software:** Software is a computer program in source or compiled form which may be available for installation non-transiently on another machine. For software which exists only to create an interactive environment, use interactive instead.
- **Sound:** A sound is a resource whose content is primarily intended to be rendered as audio. For example - a music playback file format, an audio compact disc, and recorded speech or sounds.
- **Still Image:** A static visual representation. Examples include paintings, drawings, graphic designs, plans and maps. Recommended best practice is to assign the type Text to images of textual materials. Instances of the type Still Image must also be describable as instances of the broader type Image.
- **Text:** A text is a resource whose content is primarily words for reading. For example - books, letters, dissertations, poems, newspapers, articles, archives of mailing lists. Note that facsimiles or images of texts are still of the genre text.

Organization of Metadata

Quartex provides for the ability to organize and order metadata to suit the needs of both back-end users and front-end patrons. This section documents the CLA's preferred ordering of metadata within all customizable sections within Quartex.

Document Fields

The Document Fields section, under the Configuration section of the Quartex back-end is the source of all metadata fields within Quartex. Metadata in this section is divided into "Groups" where each group is a block of metadata fields which may be applied to individual resources or entire collections. The primary group, "Standard Metadata" is applied to every resource within Quartex.

Within each group metadata may be ordered, and reordered, at will. The order that metadata appear in will affect the ordering of metadata fields in the "Asset details" and "Edit asset details" panes in the Quartex backend. Changing the order of metadata will largely only affect backend users doing cataloging work within the backend.

The order of groups can also be changed; this only affects the order that field groups appear within the "Cataloguing options" dropdown in the collection configuration menu.

Standard Metadata

- Title
- Date
- Extant
- Collection
- Reference Number
- Creator
- Geographic Coverage
- Subjects
- Genre/Form

- Description
- Language
- Source
- Provenance
- Rights Statement
- Permalink
- Citation
- External Reference
- Related Resources
- Series
- Sponsor
- Type
- Origination
- File Format

Digitization Metadata

- Contributor
- Date of Reformatting
- Reformatting Type
- Camera Model

Bibliographic Metadata

- Edition
- Imprint

Document List Configuration

Within the site management section of Quartex, the Document List page (The CLA has renamed this page to “Browse All”) is one of Quartex’s two required web pages and its configuration controls numerous aspects related to what metadata end-users see and how they interact with that metadata. Below is how the CLA has configured and ordered metadata within the Document List configuration controls.

Controlled vocabulary filtering options selected

1. Creator
2. Subjects
3. Geographic Coverage
4. Genre/Form
5. Language
6. Type
7. Source
8. Series
9. Sponsor

10. File Format

Advanced search additional phrase search fields

1. Title
2. Reference Number
3. Description
4. Rights Statement

List view metadata fields

1. Description
2. Date
3. Collection
4. Creator
5. Subjects

Note that these fields are input left to right, top to bottom, within the configuration settings.

Summary metadata field display

1. Description
2. Creator
3. Geographic Coverage
4. Subjects
5. Genre/Form

Document details metadata fields

1. Date
2. Extant
3. Collection
4. Reference Number
5. Creator
6. Geographic Coverage
7. Subjects
8. Genre/Form
9. Description
10. Edition
11. Imprint
12. Language
13. Source
14. Provenance
15. Rights Statement
16. Permalink
17. Citation
18. External Reference

19. Related Resources
20. Series
21. Sponsor
22. Type
23. Origination
24. File Format
25. Contributor
26. Date of Reformatting
27. Reformatting Type
28. Camera Model

Version History:

0.1.0 (2020/11/20)

- Initial release of this document.
 - Important for the initial release of the CLA’s matured metadata schema for Quartex as well as the configuration of Quartex’s display of these metadata fields.

0.2.0 (2021/04/30)

- Major Changes:
 - Added version history section.
 - Added a “History of the Model” section beneath the “A Metadata Model for Digital Resources” heading.
- Minor Changes:
 - Minor editing of the Introduction for added clarity and purpose.
 - Changed “Document List” heading to “Document List Configuration”.
 - Edited the paragraph following “Document List Configuration” for clarity and to indicate that the CLA locally renamed this webpage to “Browse All”.