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# CREDIT

"Metadata for You & Me: A Training Program for Shareable Metadata" -- a 2006 collaboration between the University of Illinois Library and Indiana University  
<http://www.dlib.indiana.edu/projects/mym/contact.html>

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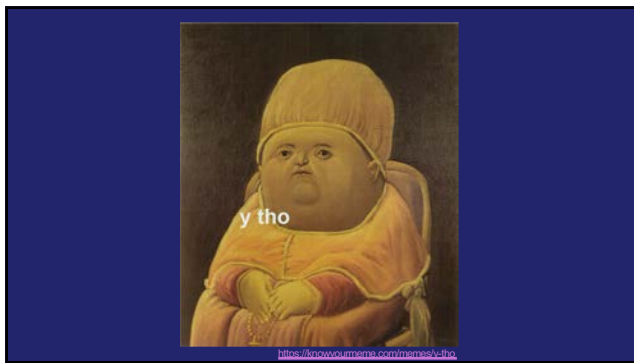
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OLD METADATA RECORD

- Title: "survey report 24405AR3.T6"
- Date: "2017/06/11"
- Format: "scanned image"
- Rights: [none] / "please contact us"



NEW METADATA RECORD

- Title: "Asia : China : Liaotung Gulf : approaches to Hulutao"
- Date: "1938-04-01", "scanned: 2017/06/11"
- Description: "Chart mapping Hulutao region of South Pacific Ocean"
- Format: "scanned image", "nautical chart"
- Rights: "public domain"



SEARCH QUERIES:

- "map south pacific"
- "chart Liaotung Gulf"
- "Chinese nautical chart"
- "1938 nautical charts"
- "free nautical chart images"

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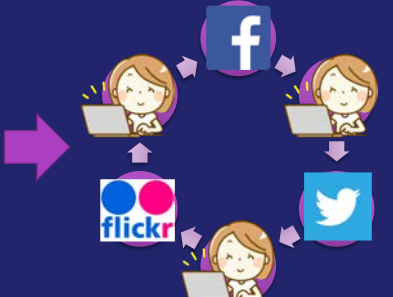
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METADATA RECORD

- Title: "Asia : China : Liaotung Gulf : approaches to Hulutao"
- Date: "1938-04-01"
- Description: "Chart mapping Hulutao region of South Pacific Ocean"
- Format: "scanned image", "nautical chart"
- Rights: "public domain"





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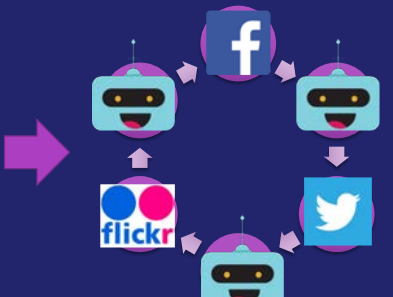
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METADATA RECORD

- Title: "Asia : China : Liaotung Gulf : approaches to Hulutao"
- Date: "1938-04-01"
- Description: "Chart mapping Hulutao region of South Pacific Ocean"
- Format: "scanned image", "nautical chart"
- Rights: "public domain"





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## IN OTHER WORDS

- No “front door”
- Metadata *will* escape (and it should!)
- Good metadata = better links & external presentation = better user experience
- Metadata in more places = increased number of access points = broader exposure

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## AGGREGATION = INCREASED USE

CSphere "pageviews" (1/1/2018 - 12/31/2018)	(Monthly pageviews - CSphere)	CSphere "clickthroughs"	DPLA "website item views"	(Monthly pageviews - DPLA)	DPLA "clickthroughs"
548,211	65,824	61,069	18,812	1,568	8,449

- *Los Angeles Public Library* digital collections
- 143,476 objects in Calisphere/DPLA
- Pageview/website item view: engagement within Calisphere/DPLA
- Clickthrough: followed URL from Calisphere/DPLA to original site

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## SIX C'S OF SHAREABLE METADATA

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"metadata is not monolithic ... it is helpful to think of metadata as multiple views that can be projected from a single information object" – Carl Lagoze, 2001

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Name of field	Name of the respective RORATE field
Owner/Publisher	Metadata → Organization name + email
	Responsible Party → Organization name + email + role
Title	Identification → Resource Title
File name	Identification → Identifier → Code
Short Description	Identification → Resource abstract + Resource
Topic category	Topic category
Keywords	Keywords
Geography	Geography
Temporal	Temporal
Reference	Reference
1. Title	Single line of text
2. Description	Multiple lines of text
3. Keywords	Multiple lines of text
4. Geography	Multiple lines of text
5. Temporal	Multiple lines of text
6. Reference	Multiple lines of text
7. Identifier	Multiple lines of text
8. Responsible Party	Multiple lines of text
9. Organization name + email	Multiple lines of text
10. Role	Multiple lines of text
11. Identifier	Multiple lines of text
12. Identifier	Multiple lines of text
13. Identifier	Multiple lines of text
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99. Identifier	Multiple lines of text
100. Identifier	Multiple lines of text



**DANGER:**  
*Overstuffed*

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Item information. View source record on contributor's website.

Title: Aaron Copland and David Whitehead, May 3, 1975

Creator: Atlantic, Atlantic

Date Created and/or Issued: 1975-05-05  
2008-08-15

<https://nsls-beta.com/items/614631437ea886d11437a31d0cc295937>

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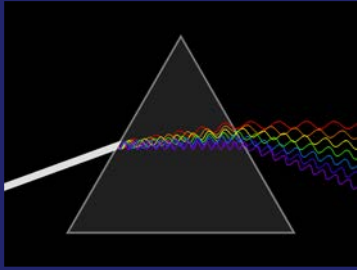
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metadata is simply a **view of a resource**, and that view may change depending on **audience, use, and context**

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## METRICS OF QUALITY METADATA

- Completeness
- Accuracy
- Provenance
- Conformance to expectations
- Logical consistency/coherence
- Timeliness
- Accessibility



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## SHAREABLE METADATA: SIX C'S

- **Content** is optimized for sharing.
- Metadata within shared collections reflects **consistent** practices.
- Metadata is **coherent**.
- **Context** is provided.
- The metadata provider **communicates** with aggregators through direct or indirect means.
- Metadata and sharing mechanisms **conform** to standards.

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## OPTIMIZED CONTENT



Each **element** needs purpose:

- *User*: meets clearly defined need
- *Aggregator*: indexing & enhancement

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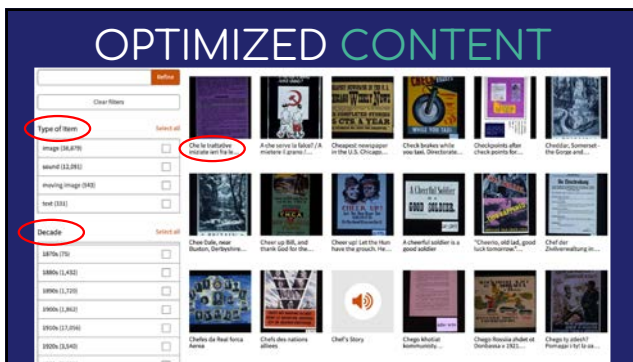
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## OPTIMIZED CONTENT



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## OPTIMIZED CONTENT

Be explicit for aggregators:

- Type of **Controlled Vocabulary**

```
<keyword vocab="ICPSR Subject Thesaurus" vocabURI="http://www.icpsr.umich.edu/thesaurus/subject.html">
quality of life</keyword>
```

- Type of **URL link** (resource itself, representation, related)

```
<dc:title>HTML 4.0 Specification</dc:title>
<dc:date>1997-12-18</dc:date>
<dc:identifier rdf:resource="http://www.w3.org/TR/REC-html40-971218/" />
<dc:terms:isVersionOf rdf:resource="http://www.w3.org/TR/REC-html40/" />
```

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## CONSISTENT PRACTICES

Image / Aerial view of Burbank's Santa Rosa Gardens



View source image on contributor's website

Item Information: View source record on contributor's website

Title: Aerial view of Burbank's Santa Rosa Gardens



Creator: [redacted]

Contributor: [redacted]

Date Created and/or Issued: 1950

Time Period: [redacted]

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## CONSISTENT PRACTICES

Image / African Daisies



View source image on contributor's website

Item Information: View source record on contributor's website

Title: African Daisies



Creator: [redacted]

Contributor: [redacted]

Date Created and/or Issued: 1950 - 1959

Time Period: [redacted]

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## CONSISTENT PRACTICES

- Predictability is key for 
- Clear & consistent across *all* records = better indexing
- Normalize & refine
  - Use controlled vocabularies

2001-03-14  
14-Mar-01  
Wednesday, March 14, 2001  
Wednesday, March 14, 2001  
March 14, 2001  
Wed, 14 March, 2001  
14 March, 2001  
March 14, 2001  
March 2001  
March, 2001  
2001 Q1  
2001 W11

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## KEEP IT COHERENT

I have no idea what you're talking about...



- Records should be self-explanatory
- Avoid local jargon
- Include [single and stable URL](#) clearly linking back to resource

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## KEEP IT COHERENT

Image / Chief Higgins at Desk with Dog



Include [single and stable URL](#) clearly linking back to resource

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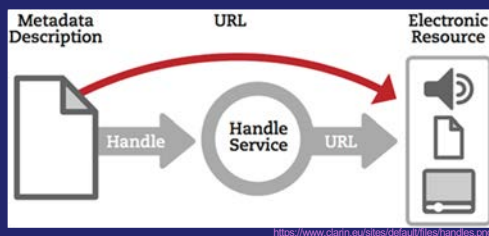
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## PERSISTENT IDENTIFIERS



Include [single and stable URL](#)

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## KEEP IT COHERENT

```
<subject>Glass</subject>
<subject>Glassblowing</subject>
<subject>Artisans</subject>
<subject>Artisans--Italy</subject>
```



```
<subject>Glass; Glassblowing;
Artisans; Artisans--Italy</subject>
```



Repeated fields >>> multi-value fields

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## PROVIDE CONTEXT

### Images of Teddy Roosevelt

<https://collabster.org/collections/17179/mr-roosevelt>



"Delivering a speech"



"On Horseback"



"With John Muir"

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## PROVIDE CONTEXT



"On Horseback"

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## PROVIDE CONTEXT



"Teddy Roosevelt on Horseback"

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## PROVIDE CONTEXT

- Aggregation obscures local context
- Remove or restate context dependent details
- *Ethical context*: values change over time; **update** or **acknowledge** insensitive or inappropriate metadata



[https://www.flickr.com/photos/danijl\\_mitchell/295026578/](https://www.flickr.com/photos/danijl_mitchell/295026578/) CC-BY-SA

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## COMMUNICATE WITH AGGREGATORS



- **MARC**: MACHine Readable Cataloging record
- **API**: Application Programming Interface
- **OAI-PMH**: Open Archives Initiative Protocol for Metadata Harvesting

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## MARC: MACHine Readable Cataloging

```

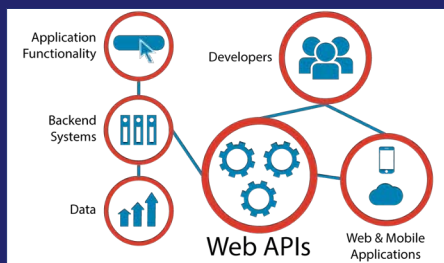
<LDR 00000aam 2200000a 4500
<008 141024/20142015noaa\\c16\\1000\\am\\eng\\d
<001 8v9780996561129
<003 04LJFRC
<005 20141024093129.0
<010 \\$a 2016934811
<040 \\$a04LJFRC$b-eng$c-04LJFRC
<020 \\$a9780996561129 (pbk.) :$c(dollar)19.99
<022 \\$a9780996561112 (hardcover) :$c(dollar)24.99
<050 1484727.7 :$a45b4 2016
<082 045a741.5523
<100 1\\$aRohl, Rod.
<245 10$aHeavy sketches among worldly distractions /$cRod Rohl.
<250 1\\$aSpecial ed.
<260 1\\$aGreen Mountain, NC :$cSalem Publishing.$cc2016.
<265 1\\$a201610
<300 1\\$apages cm.
<490 1\\$aHeavy sketches
<500 1\\$aPreviously published in 2013.
  
```

```

<ind1 version="1.0" encoding="utf-8">
<ind2 collection="http://www.loc.gov/marc2/xml"
<ind3 name="001 450 2200000a/leader"
<ind4 controlfield tag="001" ind1="1" ind2="0" ind3="0">
<ind5 controlfield tag="003" ind1="1" ind2="0" ind3="0">
<ind6 controlfield tag="005" ind1="1" ind2="0" ind3="0">
<ind7 controlfield tag="010" ind1="1" ind2="0" ind3="0">
<ind8 controlfield tag="040" ind1="1" ind2="0" ind3="0">
<ind9 controlfield tag="020" ind1="1" ind2="0" ind3="0">
<ind10 controlfield tag="050" ind1="1" ind2="0" ind3="0">
<ind11 controlfield tag="082" ind1="1" ind2="0" ind3="0">
<ind12 controlfield tag="100" ind1="1" ind2="0" ind3="0">
<ind13 controlfield tag="245" ind1="1" ind2="0" ind3="0">
<ind14 controlfield tag="250" ind1="1" ind2="0" ind3="0">
<ind15 controlfield tag="260" ind1="1" ind2="0" ind3="0">
<ind16 controlfield tag="265" ind1="1" ind2="0" ind3="0">
<ind17 controlfield tag="300" ind1="1" ind2="0" ind3="0">
<ind18 controlfield tag="490" ind1="1" ind2="0" ind3="0">
<ind19 controlfield tag="500" ind1="1" ind2="0" ind3="0">
  
```

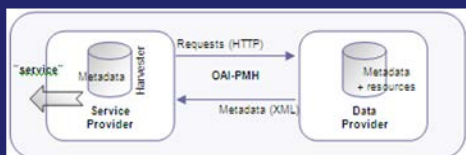
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## API: Application Programming Interface



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## OAI-PMH: Open Archives Initiative Protocol for Metadata Harvesting



(harvester)

(local repository)

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## POLL

Which standard do you have the most experience with and/or feel most comfortable using?

- Machine Readable Cataloging (MARC)
- Application Programming Interface (API)
- Open Archives Initiative Protocol for Metadata Harvesting (OAI-PMH)
- Other

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## CONFORM TO STANDARDS

- *Sharing Protocol*: MARC, API, OAI-PMH
- *Metadata Structure*: Dublin Core, MARC
- *Controlled Vocabulary/Syntax*: LCSH
- *Content Standards*: RDA, DACS
- *Technical*: UTF-8, XML entities

structure

content

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## REALITY CHECK

*Could a person with no prior knowledge determine and convey what the record describes?*

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```

<oai_dc:dc>
<dc:title>Washing and ironing clothes.</dc:title>
<dc:creator/>
<dc:date>ca. 1942</dc:date>
<dc:description>Mexican workers washing and ironing clothes.</dc:description>
<dc:subject>Agricultural laborers--Mexican--Oregon; Agricultural laborers--Housing--Oregon</dc:subject>
<dc:coverage>2001</dc:coverage>
<dc:type>Image</dc:type>
<dc:source>Silver gelatin prints</dc:source>
<dc:title>Extension Bulletin Illustrations Photograph Collection (P20)</dc:title>
<dc:identifier>P20:1069</dc:identifier>
<dc:source>Copy negative.</dc:source>
<dc:identifier>P020_1069.</dc:identifier>
<dc:identifier>http://digitalcollections.library.oregonstate.edu/u/?bracero,37</dc:identifier>
</oai_dc:dc>

```

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```

<oai_dc:dc xsi:schemaLocation="http://www.openarchives.org/OAI/2.0/oai_dc/
http://www.openarchives.org/OAI/2.0/oai_dc.xsd">
<dc:title>Washing and ironing clothes.</dc:title>
<dc:date>ca. 1942</dc:date>
<dc:date>Date Scanned: 2001</dc:date>
<dc:description>Mexican workers washing and ironing clothes.</dc:description>
<dc:subject>Agricultural laborers--Mexican--Oregon</dc:subject>
<dc:subject>Agricultural laborers--Housing--Oregon</dc:subject>
<dc:type>Image</dc:type>
<dc:format>Silver gelatin prints</dc:format>
<dc:relation>Extension Bulletin Illustrations Photograph Collection (P20)</dc:relation>
<dc:identifier>P20:1069</dc:identifier>
<dc:source>Copy negative.</dc:source>
<dc:identifier>P020_1069.</dc:identifier>
<dc:identifier>http://digitalcollections.library.oregonstate.edu/u/?bracero&#44;37</dc:identifier>
</oai_dc:dc>

```

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# QUESTIONS?

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## STRATEGIES & TOOLS

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## KNOW YOUR AUDIENCE

- Identify **current** AND **targeted users**--what do they find interesting/useful?
- **Who** is sharing/asking about your collections and **where**?
- Analyze usage data & develop user profiles



<https://catalog.oxforditem/03824367/6386227/5526516332018/>

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## CONTEXT: LOCAL VS. AGGREGATED

- **Local** context often gets lost in **aggregations**
  - Local IDs/links/etc. break or become opaque
- Make locally implied **institutional identity information** explicit & consistent for aggregators
- Provide technical metadata to associate **different copies/versions**
- Always **MAINTAIN STABLE RECORD LINKS!**

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## CONTEXT: LOCAL VS. AGGREGATED

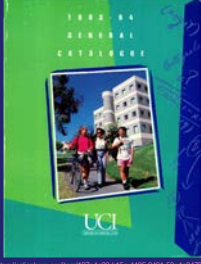
Title	1300 block north side of Market St.
Date Created and/or Issued	1906
Publication Information	CaliforniaHistoricalSociety, North Baker Research Library, 678 Mission Street, San Francisco, CA 94105-4014 <a href="http://www.californiahistoricalsociety.org/collections/northbaker_research.html">http://www.californiahistoricalsociety.org/collections/northbaker_research.html</a>
Contributing Institution	California Historical Society
Collection	1906 San Francisco Earthquake and Fire Digital Collection, Seismic
Rights Information	Please contact the contributing institution for more information re
Description	Shelf location: PC #A.25.040
Type	Image
Form/Genre	Photographs
Relation	(finding aid) <a href="https://oac.cdlib.org/findaid/ark:/13030/kt0q2nc5z2">https://oac.cdlib.org/findaid/ark:/13030/kt0q2nc5z2</a> (isReferencedBy) <a href="http://history.library.ucsf.edu/portraits_D_M.html">http://history.library.ucsf.edu/portraits_D_M.html</a>
Subject	Earthquakes--California--San Francisco--Photographs San Francisco Earthquake, Calif., 1906--Photographs
Place	San Francisco (Calif.) Personal works 40133 <a href="https://calisphere.org/item/view/13003012005000345/">https://calisphere.org/item/view/13003012005000345/</a>



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## ITERATING

Title	1993/1994 UCI General Catalogue
Creator	University of California, Irvine
Date Created and/or Issued	1993
Publication Information	University of California, Irvine Libraries, Irvine, California 92629-9557. <a href="http://www.lib.uci.edu">http://www.lib.uci.edu</a>
Contributing Institution	UC Irvine, Libraries, University Archives
Collection	UCI General Catalogue
Rights Information	Copyrighted. This material is provided for private study, scholarship, or research. Property rights reside with retained by the creators of the records and their heirs, unless transferred to the University of Ca determine who holds the copyright and pursue the copyright owner or his or her heir for permi copyright. For information on use, copyright, and attribution, please visit: <a href="http://special.lib.uci">http://special.lib.uci</a>
Description	Scope/Content: General catalogue for the academic year 1993-1994.
Type	text
Format	pdf
Identifier	UCI_General_Catalogue_1993-1994.pdf LD191.J7 C225
Language	English eng
Subject	University of California, Irvine
Relation	General Catalogue <a href="http://unpac.lib.uci.edu/801/record/81807994-57">http://unpac.lib.uci.edu/801/record/81807994-57</a>



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## ITERATING



- **MVR**: Minimum Viable Record
  - Quality over Quantity
- Good → Better → Best
- Don't **HAVE** to map everything
- Consider **SEO** (Search Engine Optimization)
  - No "Untitled"s!

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## METADATA STRUCTURE

- Map your metadata to aggregator's unique metadata profile
- Use spreadsheets for crosswalking
- Document local metadata practices & mappings

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## METADATA STRUCTURE

CDL CouchDB Field Name	UC Davis, Filipino American Archive and Repository (Omeka)
sourceResource/creator	/OAI-PMH/ListRecords/record/metadata/dc:creator
sourceResource/date/displayDate	/OAI-PMH/ListRecords/record/metadata/dc:date
sourceResource/description	/OAI-PMH/ListRecords/record/metadata/dc:description

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## METADATA STRUCTURE

- Map your metadata to aggregator's unique metadata profile
- Use spreadsheets for crosswalking
- Document local metadata practices & mappings

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## METADATA CONTENT

- Content Standards wherever possible
- Based on **fundamental** (but not immutable!) archival values
  - Journey toward inclusivity
- Avoid structural formatting (HTML, CSS) within field
- What are you describing—original object or digitized resource?



<https://www.gettyimages.com/detail/photo/Black-and-White-Portrait-of-a-Woman/1141444444>

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## METADATA CONTENT

### Original Site

*Description:* Shown in this image are the members of the Sample family:

- Morris
- Eliza
- Grace
- Tommy



### HTML

```
<ul>
<li>Morris</li>
<li>Eliza</li>
<li>Grace</li>
<li>Tommy</li>
</ul>
```



### Aggregator

*Description:* Shown in this image are the members of the Sample family:&lt;ul&gt;&lt;li&gt;Morris&lt;/li&gt;&lt;li&gt;Eliza&lt;/li&gt;&lt;li&gt;Grace&lt;/li&gt;&lt;li&gt;Tommy&lt;/li&gt;&lt;/ul&gt;

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## METADATA CONTENT

A woman holding a purse and her two children pose in a grove of short trees with very large leaves. The back of the postcard is blank with a printed title "14. Madame dans sa plantation de &lt;small&gt;petits&gt;bananiers." ("Madam in her plantation of &lt;small&gt;bananas"), information about the mission agency "Mission Catholique, a YOKO (Cameroun) C. C. Marseille 9760", and the name of the publisher "Helo Maison Jean-Bernard, editeur, St-Etienne".



<https://celis.shera.cn/item/a1b9d68e5556c5830974245a000063/>

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## CONTENT STANDARDS

- Geographic & temporal guidelines
  - Reduce ambiguity: <Cairo, Alexander County, Illinois>, NOT <Cairo>, <Alexander County>, <Illinois>
- Authorities for person/family/organization names
  - Library of Congress Name Authority File (LCNAF)
- Cataloging Cultural Objects (CCO)
- Linked Data -- Use URIs wherever available -- <http://id.loc.gov/>
- Standardized rights metadata

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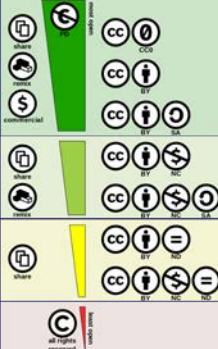
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### CREATIVE COMMONS FOR OBJECTS

- CCO: no restrictions, public domain ---->
- CC BY-NC-ND: attribute, no commercial use & no derivatives
- <https://creativecommons.org/choose/>

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## RIGHTSSTATEMENTS.ORG FOR OBJECTS

### Three Categories of Rights Statements

IN COPYRIGHT



Statements for works that are in copyright

NO COPYRIGHT



Statements for works that are not in copyright

OTHER



Statements for works where the copyright status is unclear

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## QUALITY CONTROL



- Consistency (in standards AND content) increases quality
- DLF Metadata Working Group Assessment Toolkit
  - Leveled framework
  - Tool repository
  - Metadata Application Profile "clearinghouse"
- Metadata Analysis Reports

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## LETTING IT GO

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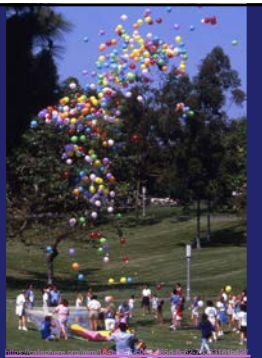
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"The DPLA believes that the vast majority of metadata as defined herein is not subject to copyright protection because it either expresses only objective facts (which are not original) or constitutes expression so limited by the number of ways the underlying ideas can be expressed that such expression has merged with those ideas."

(from DPLA's Metadata

Application Profile)



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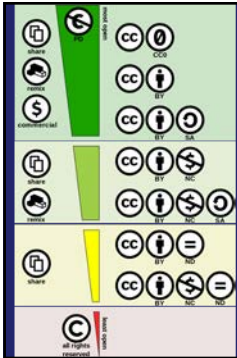
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## CREATIVE COMMONS FOR METADATA

- Creative Commons Zero (CC0):
  - Waives **copyright** and dedicates **metadata to public domain**
  - Allows **free reuse** with **zero restrictions**
- Gray area - extended descriptions
- Even with CC0, most standards & best practices recommend **attribution**

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Get Citation

We recommend you include the following information in your citation. Look below the item for additional data you may want to include.

Title: Billy Shannon and a group of bowmen, San Rafael, California, circa 1911 [photograph]  
 Date: circa 1911  
 Collection: Bowing - Billy Shannon's Villa, San Rafael, c. 1895-1912  
 Owning Institution: Marin County Free Library  
 Source: Calisphere  
 Date of access: March 22, 2019 19:49  
 Permalink: <https://calisphere.org/item/13030/MQ00002046/>

Close

Item Information. View source record on contributor's website.

Title: Billy Shannon and a group of bowmen, San Rafael, California, circa 1911 [photograph]

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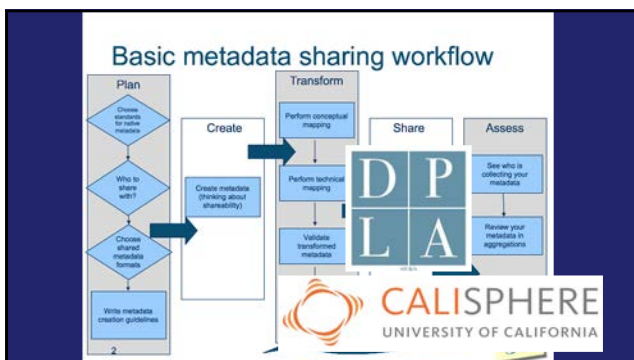
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Share your digital collections via  
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<https://californiarevealed.org/>

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QUESTIONS?

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THANK YOU!




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