



2023/2024 Metadata Guidelines for Still Image and Text Objects

California Revealed (CA-R) is an online repository of digitized materials, and we require accurate and consistent item-level descriptions—called metadata—for each object submitted for digitization. Much like how entries in a library catalog help librarians and patrons identify and find books, your metadata records are used to manage and track your materials during digitization and will help users identify and find your materials online.

Taking the time to create properly formatted, accurate, and well-described metadata ensures that your items are digitized efficiently and to your expectations. After digitization, **your metadata records will be published as the official descriptions for your materials, and will be the main way for online users to discover, access, and understand your digitized materials.**

These guidelines will help you prepare your metadata records for submission to California Revealed. Please contact us at team@californiarevealed.org with any questions, or if you would like to set up a training - ***we are here to help!***

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Overview

What is metadata?

Metadata is structured, descriptive information about an object that is used for reference and discovery. There are different types of metadata, including descriptive, technical, rights and legal, and administrative.

Consider a smart phone you used in 2015 to take hundreds of photographs. You'd like to find a particular photograph you took of your friend Sally standing on a beach during a road trip. You know who took it (you), who is in it (your friend Sally), and where it was taken (at the beach), but it's difficult to find because none of this information is attached to the image. If you had created metadata for the photograph, you might have labeled it with key terms like "road trip" and "beach," or titled it "Sally on a road trip." If that was the case, you'd be able to find the image quickly instead of searching for the image like a needle in a haystack.

How do I submit and edit my metadata records?

Metadata records can be submitted using the Nominations Spreadsheet, which the CA-R team will review and ingest into the CA-R Repository. This method is **preferred** since it allows us to easily review your submissions.

You can also directly submit and edit individual metadata records using the webform on the CA-R Repository.

- If you are a **new user without a preexisting login**, please email team@californiarevealed.org to register for a new account.
- Step-by-step CA-R Repository access instructions for returning users can be found [here](#).

Why are item-level metadata records so important for digitization?

Prior to digitization, your metadata records serve as an item-level inventory of the objects your organization has nominated for digitization and digital preservation. We use this inventory to **estimate digitization costs and understand how your nominations conform to [CA-R's Selection Criteria](#)**.

If your materials are awarded, your metadata records will be used to identify and track your materials during digitization. We use the records to:

- Confirm that we received the correct materials after shipment.
- Coordinate the unique needs and costs of your materials with our digitization vendors.
- Ensure that your physical materials have been digitized accurately and in a timely manner.
- Ensure that your digital materials have been processed accurately according to CA-R standards.

After digitization, your metadata records will be published **as the official descriptions for your digitized materials on the California Revealed website and the Internet Archive**. The public will use your metadata records to find materials and learn about the nature and context of the objects. *The metadata fields that will be viewable to the public are identified and outlined within this document.*

For more details regarding the deliverables and specifications associated with digitizing materials through our program, please review California Revealed's [Statement of Work](#).

What if I can't provide item-level metadata?

California Revealed will consider entries for metadata record submissions that are not on an item-level on a case-by-case basis. Please email team@californiarevealed.org before proceeding with anything other than item-level record creation.

We can also provide organizations with funding opportunities for the creation of item-level metadata records through our [Description Assistance: Cataloging California program](#).

Why is it so important for me to ensure that my metadata records accurately describe my materials?

We use your metadata records to track and manage your physical and digital materials through the CA-R Repository.

The CA-R Repository is an online database that tracks the digitization process, stores digitized files and corresponding metadata records, and provides access to the digital objects on our public-facing website. If the metadata is incorrectly formatted or inaccurate, it could lead to the wrong materials being digitized or published, as well as other issues that could hinder the digitization and preservation process.

Accurate and descriptive metadata is also crucial for public access. Components of your metadata records are published online in connection with your digitized materials. Well-described metadata allows people searching online to find your materials through the CA-R website, Calisphere, WorldCat, the Internet Archive, and even Google. The public will use your metadata records to understand the context, content, and importance of your materials, as well as the scope of your organization. If you misspell or abbreviate a word in your title or description, or choose to forgo including a Subject Topic, it will make it harder for users to understand the object - or find it in the first place.

As the steward of your collection, you are the expert when it comes to the describing the content of your material. **It is your responsibility to submit metadata that accurately reflects the materials you wish to digitize through CA-R.** Please commit to submitting well-described metadata records to the best of your organization's knowledge, abilities, and resources.

California Revealed can offer help in the form of training, guidance, advice, and funding. [Please reach out to us](#) with any questions or concerns.

What if the date, creator, and/or other information is unknown?

When working with historical materials, sometimes a creator, date, or another metadata field might truly be unknown. The required metadata fields that allow for the condition of "Unknown" are explicitly defined throughout this document. *Whenever possible, an inference or guess is preferred for access and description purposes.* Advice regarding how to format an approximation or guess is provided. For the non-required fields, if a value is unknown and cannot be inferred, please leave it blank.

Controlled Vocabularies and Standardized Formatting

CA-R relies on standardized names, terms, and formats for metadata records. These standards are used nationally and internationally by libraries, archives, museums, and other collecting organizations, allowing us to be in conversation with a wide network of organizations and materials. *While creating your metadata records, please use existing controlled vocabulary lists when applicable.*

The metadata fields that use controlled vocabularies are explicitly defined throughout this document and links to the lists of the vocabularies are provided. We are also able to add local terms if the need arises. **If you wish to add a term to a vocabulary list, [please email us](#).**

CA-R creates metadata records for Still Image and Text objects using the [Dublin Core metadata schema](#), a metadata formatting standard for organizing information on physical and digital resources. We use the audiovisual-specific [PBCore metadata schema](#) to organize information on moving image and sound objects. For more information about the Dublin Core schema, our controlled vocabularies, and tools for describing digitized materials, please see Section [6. Metadata Resources and Controlled Vocabularies](#) in this document.

Partner Organization Metadata Responsibilities

- Creates accurate item-level metadata records according to CA-R guidelines.
 - Submissions must be properly formatted and include all the required metadata fields. If not, the submissions will be returned for corrections.
 - If information exported from a database is used to populate your metadata records, please make sure to review and reformat your submissions according to CA-R's Metadata Guidelines.
- Conducts ongoing maintenance of metadata records throughout the digitization and preservation process.
 - Partners have continuous access and can freely edit their metadata records via the CA-R Repository.
- Reviews metadata records after digitization, supplementing with additional information to improve discoverability.
- Communicates regarding the need for guidance, as well as any changes to the records or the physical materials.

California Revealed Metadata Responsibilities

- Reviews metadata records for formatting, accuracy, discoverability, etc. and communicates regarding the need for changes.
- Offers support and answers all questions relating to what information is required and why.
- Ingests metadata spreadsheet into the CA-R Repository and publishes metadata records once objects are digitized.
- Contacts the Partner if there are any questions or issues.

For more information regarding expectations and responsibilities associated with participating, please review [CA-R's Digitization and Preservation Agreement](#).

California Revealed serves many volunteer-based organizations with limited funding, labor, and expertise. We recognize that cultural heritage organizations, particularly those dedicated to preserving the history of minoritized and oppressed communities, experience a chronic lack of funding, labor, and other resources. We fully commit to a reflexive and reparative digitization and preservation process that meets our Partners where they are.

If you have any questions about our metadata requirements, please email us at team@californiarevealed.org. Thank you for participating in [California Revealed](#)!

1. Required Metadata Fields

This section provides guidance and definitions regarding metadata fields that Partners are **required** to include and properly format in their CA-R submission. Refer to each section for specific guidance regarding formatting, sources of information, and entering “Unknown” as a value.

1.1 Organization

The name of your organization used to identify and group your materials in our repository. This field will be viewable to the public and used to find and access your materials.

Sources of Information

1.1.1 Take the information from your official, public-facing documentation.

General Rules

1.1.2 If submitting for the first time, make sure to use the form of your organization’s name that you want visible on the public CA-R site.

1.1.3 If you have already participated in previous CA-R cycles, make sure to use the same name used in previous submissions.

Example California State Library

1.2 Title

A unique and descriptive name used to identify and discover the item within the repository. Titles may be formal or supplied. This field will be viewable to the public and used to find and access your materials. Materials that are part of a series should be titled using a standardized naming convention.

Sources of Information

1.2.1 A *formal title* is the official title of the object, and usually appears prominently on the materials being described, such as the title of a book. When recording a formal title, transcribe the information as written. If the formal title is insufficient or misleading, use a *supplied title* instead, and record the formal title within the [3.1 Alternative Title](#) field.

1.2.2 A *supplied title* should be used when there is no formal title included, or when the formal title is insufficient, misleading, or inaccurate. Use the subject matter or topics contained within the item and the nature of the materials to create a title that will sufficiently identify and describe the nature of the item to the public. This can include the formal title, in addition to other information.

1.2.3 Review [6.2 Descriptive Metadata Resources](#) for additional guidance regarding title creation.

General Rules

1.2.4 It is strongly recommended that titles, whether formal or supplied, are unique. Distinguish similar or duplicate titles with dates or additional description, e.g. [Title] YYYY-MM-DD; or for 2 objects both titled “Johnson family scrapbook,” distinguish them as “Johnson family Lake Tahoe camping trip scrapbook” and “Johnson family competitive eating scrapbook”.

1.2.5 Individual newspaper issues and other published materials with serial issues should be titled [Title] YYYY-MM-DD.

1.2.6 When possible, titles should follow the archival standard of using “Sentence case.” In other words, only use uppercase letters to indicate a proper noun or formal title, beyond the first letter. See examples below.

1.2.7 All titles should be consistently formatted in relation to the naming conventions used for the other items in the submission. For example, if you title one of your objects “Santa Cruz prehistoric canine sketch,” you would title a similar object “San Diego prehistoric canine sketch,” rather than “Ancient S.D. dog drawing”. This will allow users to find similar items using the same search terms.

1.2.8 Do not submit titles that include abbreviations or special characters (e.g., please use “and” instead of “&” and “dollar” instead of “\$”) unless they are part of the official/formal title. If the formal title includes an abbreviation, we encourage you to use the [3.1 Alternative Title](#) field to include a version of the title without the abbreviation. This will improve discoverability for users searching for materials using non-abbreviated terms.

1.2.9 Proofread your submissions to make sure there are no typos or misspelled words. If you wish to submit a formal title of an item that includes a misspelling, use the term “[sic]” to indicate it is intentional. We also encourage you to use the [3.1 Alternative Title](#) field to include a title without the misspelling.

1.2.10 If you are returning Partner submitting items to CA-R that are additions to previously digitized collections, make sure to use the same naming conventions used in your previous submission.

1.2.10.1 See [2.10 Related Materials/Relationship Type](#), [3.1 Alternative Title](#), [3.2 Series Title](#), and [3.3 Collection Guide Title/Collection Guide URL](#) to learn how to link your submissions to previously digitized items.

Example (Newspaper issue)	Carmel Valley Outlook 1994-04-04
Example (Scrapbook, supplied title)	Johnson family Disneyland scrapbook
Example (Document, formal title)	The Guide to Female Studies III
Example (Photograph, supplied title)	Damaged train at Donner Pass
Example (Poster, formal title)	Let Us Be United
Example (Sheet music, formal title)	The Olde [Sic] Song of San Clemente

1.3 Partner-supplied Identifier (Call Number -or- Temporary Identifier)

A unique identifier, in the form of a Call Number **or** Temporary Identifier, is required to distinguish your items within our system. Partners **MUST** submit separate unique identifiers for each item submitted.

Sources of Information

1.3.1 A Call Number is the identifier that your organization uses to identify and locate the object. This field will display online and will be used by both your own Organization and the public to identify the items within your Organization’s holdings.

1.3.2 If a Call Number does not exist, create a Temporary Identifier. Temporary Identifiers will not display online. If your organization does not want Call Number information displayed to the public, use this field.

General Rules

1.3.3 All identifiers, whether a Call Number or a Temporary Identifier, must be unique. Distinguish duplicate Call Numbers using an additional number, or another convention amenable to your Organization's internal cataloging system.

1.3.4 For digital materials, the digital file name should be used as the Temporary Identifier, e.g. JohnJonesBookReport2001.docx

1.3.4.1 If the digital material also has a Call Number, please include it.

Examples T2020.102.1, T2020.102.2, T2020.102.3.001, T2020.102.3.002
Examples img4200.jpg, img4201.jpg, TheArtofClowning.pdf

1.4 Created Date

Date of the creation of the resource. Dates **MUST** be formatted as YYYY-MM-DD in order to be submitted into the CA-R repository. This field will be viewable to the public and used to find and access your materials.

Sources of Information

1.4.1 Take the information from any reliable source, including internal evidence of the materials being described. Review [6.2 Descriptive Metadata Resources](#) for additional guidance regarding dating materials.

1.4.2 Dates are formatted in accordance with the Library of Congress Extended Date/Time Format: <https://www.loc.gov/standards/datetime/>

General Rules

1.4.3 Enter the value XXXX if you are unable to determine the date.

1.4.4 If date is approximate, use "~" at the end, e.g. YYYY~.

1.4.5 If date is uncertain, assumed, or inferred, use "?" at the end.

1.4.6 To date an object within a general time span, such as a decade, use "X" at the end, e.g. YYYYX.

1.4.7 To date an object within a specific time span, use a "/" between the two dates.

1.4.8 If an object has multiple dates of creation, use brackets and a comma, e.g. [YYYY,YYYY,YYYY].

Example	1976-07-04
Example (July 1976)	1976-07
Example (1890s)	189X
Example (circa 1890s)	189X~
Example (August 1, 1993 to April 5, 1994)	1993-08-01/1994-04-05

Example (August 1, 1993, April 5, 1994)	[1993-08-01, 1994-04-05]
Example (20 th century?)	19XX?
Example (Unknown)	XXXX

1.5 Creators and Contributors

A person, family, or group responsible for, or involved in, the creation and dissemination of the material, such as the creator, illustrator, publisher, and/or copyright holder. **The Creator role is a required field.** Recording other roles is optional but recommended for discoverability and to adequately credit individuals involved. Individual names must be formatted as: Last Name, First Name. This field will be viewable to the public and used to find and access your materials.

Commentary: "Unknown" is an acceptable value for the Creator name if the value is truly Unknown. This value should be avoided whenever possible. If Contributors are Unknown, leave the Contributor field blank.

Sources of Information

- 1.5.1 Take the information from any reliable source, including internal evidence of the materials being described, or information from an outside source, such as a donor.
- 1.5.2 A *Creator* is a person, family, or group responsible for the creation of the material.
- 1.5.3 If an entity is named, and their role is known, designate their role using the appropriate term listed in the MARC Code List for Relators Scheme: <https://id.loc.gov/vocabulary/relators.html>
 - 1.5.3.1 If an entity is named, but their role is unknown, designate them as a *Creator*.
- 1.5.4 Record the name in the form by which the entity is generally known, even if different from what is listed on the object.
 - 1.5.4.1 If created by a well-known entity, use the same format of the name used in the Library of Congress Name Authority File: <http://id.loc.gov/authorities/names.html>

General Rules

- 1.5.5 Individual names must be formatted as *Last Name, First Name*.
- 1.5.6 Spell out abbreviations.
- 1.5.7 If creator is assumed, enclose in brackets.
- 1.5.8 If creator is uncertain, use "?" at the end.
- 1.5.9 If there are multiple creators, separate each entity using a semicolon.

Example	Doe, John
Example	[Kennedy family]
Example	United States. Bureau of Insular Affairs
Example	Doe, John; Doe, Jane

1.6 Significance

This field will *not* be displayed online. Explain why the object or collection is significant to California and/or local history. Justify why the object should be preserved and made accessible for future generations. This field is used to determine whether the materials are appropriate for digitization and inclusion in the California Revealed collection. Please carry over any descriptive information that will be helpful for users to the 1.7 Description field.

Sources of Information

1.6.1 Take the information from any reliable source, including internal evidence of the materials being described, or information from an outside source.

General Rules

1.6.2 This field will be used by CA-R team and the CA-R Advisory Board to determine how the nominated materials fit into [CA-R's Selection Criteria](#). Please keep the explanation relatively brief if possible. If your justification is the same across submissions, the same statement can be used for all records submitted.

1.6.3 If the statement also includes contextual information important for research, preservation, discovery, and/or access purposes, such as key words, **please also include the information in the Description field, which will display online**. If appropriate, you can use the same statement for both fields.

1.6.4 Use complete sentences when writing the significance statement.

Example

The Walnut Creek Art Teachers Newsletter documents the development of art education in the East Bay from 1925 to 1980. The issues are deteriorating, and this collection is the only known set of copies.

1.7 Description

A summary of the intellectual content of the object and any contextual information necessary to understand the importance of the object from a research perspective. Use as much detail as possible to enhance discoverability. This field will be viewable to the public and used to find and access your materials.

Sources of Information

1.7.1 Take the information from any reliable source, including internal evidence of the materials being described, or information from an outside source, such as a collection description.

General Rules

1.7.2 Use complete sentences and intentionally include specific key words likely to be searched by researchers looking for materials covering topics that pertain to the object.

1.7.3 Use consistent formatting so that each Description record in your submission follows the same conventions. Review [6.2 Descriptive Metadata Resources](#) for additional guidance regarding creating descriptions.

1.7.4 Avoid using abbreviations or special characters (e.g., please use “and” instead of “&” and

“dollar” instead of “\$”).

1.7.5 Discuss the topic and nature of the specific object, as well as any information related to the collection as whole.

1.7.6 **If you have access to contextual information regarding the material that is important for research, preservation, discovery, and/or access purposes, include it.** The description field is the main way for the public to understand your collection materials. It is also a valuable way to advertise the importance of your organization’s holdings.

1.7.7 If submitting via the CA-R Repository, use the “Add” button to create an additional entry if your description includes multiple paragraphs.

Example The Los Angeles Clown Poem Collection, collected by Barry H. Brooks, consists of poems by prominent clowns in California, published from 1889 to 2019. They include descriptions of clowning and the lifestyle associated with clowning, as well as biographical information about famous clowns. Taken together, the collection paints a picture of the changing nature of clown culture over the past 125 years. This poem was written by Brooks’ clown wife, Mildred Pierce, on a custom-made miniature typewriter. Pierce uses alliteration to discuss the emotional labor involved in tying balloon animals at children’s birthday parties. At the time of the poem, Pierce was grieving the loss of her dog, Lollipop, reflected in the hand drawn lollipops in the margins of the paper.

1.8 Condition Value and Condition Notes

Use the Condition Value field to classify the object’s overall physical condition using the following controlled vocabulary: *Excellent, Good, Fair, Poor, Unknown*. If the object’s condition is anything other than Excellent or Good, please further describe the condition using the Condition Notes field.

Please note any prior damage, where and how the material has deteriorated, or if the object requires special handling. **Please also note if an object is bound or disbound, and if the vendor has permission to disbind the object for digitization.**

This field **will not display** online. The field will help CA-R team members and the digitization vendor properly handle the materials for nomination and processing purposes during the digitization cycle.

Sources of Information

1.8.1 Survey the item and describe its condition: *Excellent, Good, Fair, Poor, Unknown*.

1.8.2 Using the Condition Notes field, record any deterioration or damage to the object.

1.8.3 Using the Condition Notes field, record whether the item is bound, and if it is safe to disbind.

General Rules

1.8.4 Description of condition should be brief, but sufficient for us to understand the existing

condition of the item and how to handle it during digitization.

Example Fair; Brittle paper with deteriorating edges.

Example Good; Bound in 3 ring binder. Okay to disbind.

1.9 Media Type

A controlled field denoting the type of resource within the CA-R Repository. For print materials, choose between two options: *Still Image* or *Text*. This field will be viewable to the public and used to find and access your materials.

Sources of Information

1.9.1 *Text* denotes materials that are intended to be read in detail and primarily contain textual information, such as manuscripts, magazines, newspapers, books, and letters.

1.9.2 *Still Image* refers to materials that contain primarily visual information, such as photographs.

General Rules

1.9.3 Controlled vocabulary field. This field may not contain more than one value per metadata record.

Example Text

Example Still Image

1.10 Format

Identify the physical format of the resource using our controlled vocabulary (listed in 1.10.1). This field will be viewable to the public and used to find and access your materials.

Sources of Information

1.10.1 Choose from the following: *Aperture Card, Article, Book, Booklet, Bound Book of Newspapers, Brochure, Card, Catalog, Clipping, Color transparency, Correspondence, Document, Drawing, Ephemera, Field Notes, Flyer, Glass Negative, Invitation, Letter, Lithograph, Manuscript, Map, Microfiche, Microfilm, Newsletter, Newspaper, Painting, Pamphlet, Periodical, Photograph, Photograph Album, Photographic Negative, Plaque, Postcard, Poster, Print, Program, Report, Roster, Scrapbook, Slide, Stereograph card, Transcript, Yearbook.*

1.10.1.1 If submitting print material in a digital format, list the digital file format. Only the following file formats are accepted: *.doc, .docx, .jp2, .jpg, .pdf, .pdfa, .png, .tif/.tiff*

General Rules

1.10.2 This field may only contain a single value. If what you wish to submit contains multiple formats, separate them into multiple metadata records by format. Use the [2.10 Relationship/Relationship Type](#) field to record the relationship between the two objects.

Example Photographic Negative

Example Bound book of Newspapers
Example .docx

1.11 Total Number of Parts and Type of Parts

The Number of Parts and Type of Parts fields describe the total number of pages, reels, slides, files, or negatives contained within the object. **For bound objects, include the front and back cover in addition to any loose pages or ephemera in the total page count. Double sided pages, including photographs with annotations on the back, are considered 2 separate pages.**

This field is used to calculate a digitization price estimate, as well as to identify and digitize your materials. This field will be viewable to the public and used to describe your materials.

Sources of Information

- 1.11.1 Count the total number of parts within the object that will be captured during digitization, e.g. 400 pages.
 - 1.11.1.1 A piece of paper with information on both sides counts as 2 pages.
 - 1.11.1.2 Include the cover, the inside cover (if applicable), and the back cover in your count, along with any loose materials.
- 1.11.2 Designate the type of the parts within the Type of Parts field: *Disc, File, Negative, Page, Print Reel, or Slide*.

General Rules

- 1.11.3 Do not include a comma when listing a quantity higher than 1000.
- 1.11.4 These fields should only describe a single object. If what you wish to submit contains multiple sets of pages/parts (such as a folder that contains both a letter and a slide), separate them into multiple metadata records (e.g. create a metadata record for the letter and another metadata record for the slide). You can use the [2.10 Relationship/Relationship Type](#) fields to record the relationship between the two objects.
- 1.11.5 Make sure to include all parts/pages that will be digitized in the Total Number of Parts field.

Example 2 Page
Example 1000 File
Example 12 Reel

1.12 Length and Width and Unit of Measurement (Dimensions of Object)

The Length, Width, and Unit of Measurement fields are used to record the length and width of the physical object in inches or centimeters, using whole numbers or decimals (no fractions). These fields are used to identify, digitize, and create a price estimate for your materials. It will also be viewable to the public and used to describe your materials.

Sources of Information

1.12.1 Measure the physical dimensions of the object, and enter the length, width, and unit in each respective field.

General Rules

1.12.2 If you wish to submit pages with multiple dimensions, please supply the value of the page that has the largest dimensions.

1.12.3 Do not use fractions. Please convert all fractions to decimal values.

1.12.4 For unknown dimensions, enter 0 x 0 in/cm. Whenever possible, avoid using this designation and measure all your objects.

Example 12.5 x 24 in

Example 4 x 6.75 cm

1.13 Copyright Statement

This field provides information about rights held in and over the resource. Please note that CA-R may request to confirm copyright status of your materials, and confirmation can affect the digitization timeline and/or our ability to proceed with digitization. This field will be viewable to the public. Use one of three boilerplate statements provided below.

Sources of Information

1.13.1 Please see [CA-R Permissions Guidelines](#) for guidance regarding determining the copyright status of your materials. Choose between the 3 boilerplate statements provided.

1.13.2 As of January 1, 2023, most materials created prior to 1928 are considered Public Domain and can be freely used by the public. To determine if an object falls in the public domain, consult: <https://copyright.cornell.edu/publicdomain>

General Rules

1.13.3 Copy and paste one of the three boilerplate statements supplied below, amending the text in red brackets to associate the statement with your organization.

Public Domain Public Domain. No restrictions on use.

Copyrighted Copyrighted. Rights are owned by [insert name of Copyright Holder]. Copyright Holder has given Organization permission to provide access to the digitized work online. Transmission or reproduction of materials protected by copyright beyond that allowed by fair use requires the written permission of the copyright owner. In addition, the reproduction of some materials may be restricted by terms of gift or purchase agreements, donor restrictions, privacy and publicity rights, licensing and trademarks. Works not in the public domain cannot be commercially exploited without permission of the copyright owner. Responsibility for any use rests exclusively with the user.

Unknown

Copyright status unknown. This work may be protected by the U.S. Copyright Law (Title 17, U.S.C.). In addition, its reproduction may be restricted by terms of gift or purchase agreements, donor restrictions, privacy and publicity rights, licensing and trademarks. This work is accessible for purposes of education and research. Transmission or reproduction of works protected by copyright beyond that allowed by fair use requires the written permission of the copyright owners. Works not in the public domain cannot be commercially exploited without permission of the copyright owner. Responsibility for any use rests exclusively with the user. [Insert name of Library/Archive] attempted to find rights owners without success but is eager to hear from them so that we may obtain permission, if needed. Upon request to [insert email at Library/Archive], digitized works can be removed from public view if there are rights issues that need to be resolved.

2. Recommended Metadata Fields

This section provides guidance and definitions regarding metadata fields that CA-R **highly recommends** filling out to adequately describe and promote the online discovery of your objects. However, certain fields might require information that the Partner is unable to obtain. Including as much metadata as possible is crucial to helping the public access your digitized objects through the CA-R Repository. CA-R will reach out to Partners to provide us with additional metadata if the original submission is insufficient.

Commentary: If any of the following fields are unknown, leave blank.

2.1 Partner Administrative Notes

Administrative or technical notes to CA-R and/or vendor(s), as needed. This field will not display online.

Example Photos are arranged in alphabetical order by subject - not chronologically. - J.D., 11/23/2021

Example Do not scan the backs of the photos. - J.D., 11/23/2021

2.2 Generation

A controlled field denoting the status of the item as a copy or original. CA-R prefers to digitize the source closest to the original, if not the original. This field will be viewable to the public and used to describe your materials.

Sources of Information

2.2.1 Take the information from any reliable source, including internal evidence of the materials being described, or information from an outside source, such as a collection description.

General Rules

2.2.2 Select from the following values: *Original, Copy*.

2.2.2.1 Published materials with multiple copies, such as a brochure or a pamphlet, are still considered “Original”. However, you would enter “Copy” if the object was a photocopy of that brochure or pamphlet.

Example Original

Example Copy

2.3 Item Annotations

Any relevant information as it is recorded on the container, item(s), or backs of item(s), including captions, notes, photograph annotations, and publication information. This field will be viewable to the public and used to find and access your materials.

Sources of Information

2.3.1 Survey the item for any relevant information as it is recorded on the object, such as the caption on the back of a photograph. Review [6.2 Descriptive Metadata Resources](#) for additional guidance regarding recording item annotations.

General Rules

2.3.2 This field is typically for information that will not be OCR’d, digitized, or recorded otherwise.

2.3.3 To include multiple paragraphs or separate annotations, please use the “Add” button to create an additional entry.

Example “John’s day at the beach, 1949. What a blast!” is written in pen on the back of the photograph.

2.4 Subject (Topic)

The topic (or topics) contained within the material. This field functions similarly to a “Search Term,” and should contain keywords or subjects that summarize the material. This field will be viewable to the public and used to find and access your materials.

Sources of Information

2.4.1 Survey the item for any relevant information and record it, formatting the topic in accordance with the Library of Congress Subject Headings: <http://id.loc.gov/authorities/subjects.html>

General Rules

2.4.2 To add multiple entries, please click “Add” if inputting online. If submitting using a spreadsheet, separate multiple entries using a “;”

Example Adobe buildings--California--1910-1930;Water conservation

Example Families--California--East Los Angeles;Amusement parks;
Racism;Travel;Trains;Inner city--Social conditions--

	Personal narratives
Example	Celebrations--Christmas--Family--Holidays;Cattle trade--California;Livestock;Poverty;Ranching;Cowboys
Example	Women pioneers--California;Orthodox Judaism;Zionism;Jews--Alcohol use;Ballet dancers

2.5 Subject (Entity)

The people, group, or corporation discussed in or relevant to the material. The Subject (Entity) field can be viewed as the equivalent of a 'Search Term,' and should contain names that are found within the material. This field will be viewable to the public and used to find and access your materials.

Sources of Information

2.5.1 Survey the item for any relevant information and record it.

2.5.2 Record the name in the form by which the subject is generally known.

2.5.2.1 If the entity is widely known, use the same format of the name used in the Library of Congress Name Authority File: <http://id.loc.gov/authorities/names.html>

General Rules

2.5.3 Individual names must be formatted as Last Name, First Name.

2.5.4 To add multiple entries, please click "Add" if inputting online. If submitting using a spreadsheet, separate multiple entries using a ","

2.5.5 This field is used to describe what is discussed within the material, NOT the person or entity that created the material.

Example Adams, Ansel, 1902-1984

Example Farmers and Merchants Bank of Los Angeles

Example General Motors Corporation. Chevrolet Motor Division

2.6 Spatial Coverage

The geographic area discussed within the source material, or relevant to the source material. Most often a named place or a location. **Because California Revealed is a project specifically centered on spatial coverage, this field is especially important to many users.** This field will be viewable to the public and used to find and access your materials.

Sources of Information

2.6.1 Survey the item for the relevant information and record it, referencing the location as stated in the Library of Congress Name Authority File: <http://id.loc.gov/authorities/names.html>

General Rules

2.6.2 Format as [city/territory] (Calif.), e.g. Santa Cruz (Calif.).

2.6.3 To add multiple entries, please click "Add" if inputting online. If submitting using a spreadsheet, separate multiple entries using a ","

Example San Francisco (Calif.)
Example Ferry Building (San Francisco, Calif.)

2.7 Temporal Coverage

Temporal coverage identifies a span of time discussed in a resource, and is intended to list dates, years, and time periods not already covered in the date created or date published fields. Coverage may also be a named period, date, or date range.

Sources of Information

2.7.1 Survey the item for the relevant information and record it, referencing the Library of Congress Extended Date/Time Format: <https://www.loc.gov/standards/datetime/>

General Rules

2.7.2 Format as YYYY-MM-DD.

2.7.3 To add multiple entries, please click “Add” if inputting online. If submitting using a spreadsheet, separate multiple entries using a “;”

2.7.4 For guidance on formatting, see [1.4 Created Date](#).

Example	1776-07-04
Example (1890s)	189X
Example (circa March 1972)	1972-03~
Example (August 1, 1993 to April 5, 1994)	1993-08-01/1994-04-05

2.8 Language

The three-letter code for the language, or languages, used in the material. Input “eng” for English. This field will be viewable to the public and used to find and access your materials.

Sources of Information

2.8.1 Survey the item for the relevant information and record it, referencing the language using the ISO 639.2 Codes for Names of Languages: https://www.loc.gov/standards/iso639-2/php/code_list.php

General Rules

2.8.2 To add multiple entries, please click “Add” if inputting online. If submitting using a spreadsheet, separate multiple entries using a “;”

Example (English and Cherokee)	eng; chr
Example (Armenian)	arm
Example (Spanish)	spa

2.9 Country of Creation

The two-letter code for the country that the object was created in. This field will be viewable to the public and used to find and access your materials.

Sources of Information

2.9.1 Survey the item for the relevant information and record it, referencing the country code using the ISO 3166-1 Country Codes list: <https://www.iso.org/obp/ui/#search>

2.9.2 Enter two-letter country code in the field, using the ISO 3166-1 controlled vocabulary for reference.

Example (United States of America) US

Example (Mexico) MX

Example (Canada) CA

2.10 Related Materials and Relationship Type

List related Title(s), with the Partner-supplied identifier in parentheses, if the object is directly connected (either physically or intellectually) to another object within the CA-R Repository. This will create a publicly viewable link between the two objects on californiarevealed.org.

These fields should be used for items that are directly related to each other, such as an audio recording of an oral history and a transcript of that oral history. For less direct relationships, such as the same collection or grouping, see fields [3.2 Series Title](#) and [3.3 Collection Guide Title](#).

Sources of Information

2.10.1 Survey the items, in addition to objects you have previously digitized with CA-R, and record the Title ([1.2](#)) and Partner-supplied Identifier ([1.3](#)) of the related materials.

2.10.1.1 This field is particularly useful to connect materials that are directly related, but contain different formats ([1.10](#)), page counts ([1.11](#)), or dimensions ([1.12](#)).

2.10.2 Use the Relationship Type field to define the relationship.

General Rules

2.9.3 Depending on what objects you listed in the Relationship field, define the connection using the Relationship Type field. A complete list of Relationship Type options can be found within the Nominations Ingest spreadsheet and the webform on the CA-R Repository.

Example (Oral history recording and oral history transcript)

Title	Related Materials	Relationship Type
Whittier Oral History Recording (AV-44)	Whittier Oral History Transcript (CC-22)	Is Related To
Whittier Oral History Transcript (CC-22)	Whittier Oral History Recording (AV-44)	Is Related To

Example (Program and a loose ticket inside of the booklet)

Title	Related Item Title	Relationship Type
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Talladega Nights ticket (T105.6)	Talladega Nights performance program (T105.8)	Is Part Of
----------------------------------	---	------------

3. Context Dependent Metadata Fields

This section provides guidance and definitions regarding metadata fields that depend on the context of the object, such as Partner-specific collection management practices, the format of the object, or its relation to other objects. CA-R **recommends** filling out these fields on an “as needed” basis to sufficiently describe and promote the online discovery of your objects. However, these fields do not apply to every object, and certain fields might require information that the Partner is unable to obtain.

Commentary: If any of the following fields are unknown, leave blank.

3.1 Alternative Title

The Alternative Title(s) field is used to record a Title as indicated by a label on the original object. This field can also be used to record another version of a Title, such as a name by which a resource is popularly known, in order to help find the item. This field is used to record information not included in the [1.2 Title](#) field.

Sources of Information

3.1.1 Survey the item for a physical label or formal title and record it.

General Rules

3.1.2 Do not submit titles with abbreviations or special characters. If you wish to submit the formal title of an item and it includes abbreviations or a misspelling, use the term “[sic]” to indicate that it is intentional.

Example Johnny’s Rokkin [sic] Notebook

3.2 Series Title

Used to identify and group items that are part of the same archival series, collection, newspaper series, serial publication, or an equivalently broad grouping. A Series Title will link your items together on californiarevealed.org, and help users find items that are related or relevant to each other.

Sources of Information

3.2.1 If the materials have been arranged and described using a Finding Aid, record the name of the Series as it is stated in the Finding Aid.

3.2.2 If the materials have NOT been arranged and described using a Finding Aid, survey the items (in addition to objects you have previously digitized with CA-R) and identify any groupings or connections between the objects, such as similar topics or creators. Create a name for the grouping that accurately describes the materials within it.

General Rules

3.2.3 Do not submit Series Titles with abbreviations or special characters.

3.2.4 If you have used the Series Title field to describe a grouping in past submissions, and you wish

to submit additional items in the same grouping, use the same Series Title to connect current and past submissions.

Example University of California, Berkeley course catalogs

Example John Johnson spaghetti dinner placemat collection

3.3 Collection Guide Title and Collection Guide URL

The Collection Guide Title field is used to identify and group items that are part of a larger named collection, or that have been described and arranged within a reference resource, such as a Finding Aid. By using this field and the Collection Guide URL field, we can highlight collection-level relationships and direct users to additional resources not available on californiarevealed.org. CA-R can link to Finding Aids hosted by the Partner as well as those hosted by the [Online Archive of California](#) (OAC).

Commentary: We encourage Partners to participate in the OAC as contributors, as it can serve as another platform for accessing Partner materials. The OAC also offers free tools, such as [RecordEXPRESS](#) (an EAD compliant collection guide writing form), and training opportunities via their parent organization, the [California Digital Library](#).

Sources of Information

3.3.1 If the materials have been arranged and described using a Finding Aid, or if they are part of the same official archival collection, record the official name of the Finding Aid/Collection within the Collection Guide Title field.

3.3.1.1 If you have used the Collection Guide Title field in past submissions, and you wish to submit additional items in the same grouping, use the same Collection Guide Title you used previously to connect your current and past submissions.

3.3.2 If there is a webpage that provides additional reference materials for users regarding the Collection, such as an online Finding Aid, copy and paste the URL into the Collection Guide URL field, e.g. <https://oac.cdlib.org/findaid/ark:/13030/kt0j49r8t8/>

Example Los Angeles Clown Poem Collection, 1925-2021

Example Patricia Patterson Papers

Example San Mateo Working Mothers Protest Poster Archive

Example <https://oac.cdlib.org/findaid/ark:/13030/kt129033hb>

Example https://uploads-ssl.webflow.com/59613419dcbd9b40dceb57a6/600f0141a952a6be3831ead8_Marcus%20E.%20Jones%20finding%20aid%20REVISED.pdf

3.4 Serial Volume and Serial Issue

The Serial Volume and Serial Issue fields are used to record the volume and issue numbers of serial publications, such as newspapers and magazines. This field will be viewable to the public and used to find and access digitized serial publications.

Sources of Information

3.4.1 Survey the item for a volume or issue number (commonly found on the masthead), and record it in the respective field.

General Rules

3.4.2 Use *numbers* only (No Roman numerals, etc.)

3.5 Published Date

The Published Date field denotes the date of formal issuance of the material, if different from the 1.4 Created Date field. ***This field is required for newspapers.***

Sources of Information

3.5.1 Survey the item for the relevant information and record it, referencing the Library of Congress Extended Date/Time Format: <https://www.loc.gov/standards/datetime/>

General Rules

3.5.2 Please note that the Published Date field is a required entry for newspapers.

3.5.3 Format as YYYY-MM-DD.

3.5.4 For further guidance, see General Rules under 1.4 Created Date.

Example	1776-07-04
Example (1890s)	189X
Example (circa March 1972)	1972-03~
Example (August 1, 1993 to April 5, 1994)	1993-08-01/1994-04-05

3.6 Publisher

The people, group, or corporation responsible for making the resource publicly available at the time of its creation. This field will be viewable to the public and used to find and access your materials.

Sources of Information

3.6.1 Take the information from any reliable source, including internal evidence of the materials being described, or information from an outside source, such as a donor.

3.6.2 Record the name in the form by which the publisher is formally known.

3.6.2.1 If the entity is widely known, use the same format of the name used in the Library of Congress Name Authority File: <http://id.loc.gov/authorities/names.html>

General Rules

3.6.3 Individual names must be formatted as Last Name, First Name.

3.6.4 Spell out abbreviations.

3.6.5 If assumed, enclose in brackets.

3.6.6 If uncertain, use “?” at the end.

Example Doe, John

Example Kennedy family?
Example [United States. Bureau of Insular Affairs]

3.7 Publication Location

The geographic area listed in the masthead of a serial publication, such as a newspaper or a magazine. This field will be viewable to the public and used to find and access your materials.

Sources of Information

3.7.1 Survey the item for the relevant information (commonly found on the masthead), and record it in the respective field.

3.7.2 Reference the location as stated in the Library of Congress Name Authority File:
<http://id.loc.gov/authorities/names.html>

General Rules

3.7.3 Format as [city/territory] (Calif.), e.g. Santa Cruz (Calif.).

Example San Francisco (Calif.)

3.8 Copyright Date

The Copyright Date field denotes the date of formal issuance of copyright.

Sources of Information

3.8.1 Use your organizational records to find the copyright date and record it, referencing the Library of Congress Extended Date/Time Format: <https://www.loc.gov/standards/datetime/>

General Rules

3.8.2 Format as YYYY-MM-DD.

3.8.3 For further guidance, see General Rules under 1.4 Created Date.

Example 1980-07-04

3.9 Copyright Holder

The people, group, or corporation who own the copyright for the material. This field will not display online.

Sources of Information

3.9.2 Record the name in the form by which the copyright holder is formally known.

3.6.2.1 If the entity is widely known, use the same format of the name used in the Library of Congress Name Authority File: <http://id.loc.gov/authorities/names.html>

General Rules

3.9.3 Individual names must be formatted as Last Name, First Name.

3.9.4 Spell out abbreviations.

Example Doe, John

3.10 Copyright Holder Information

The contact information for the people, group, or corporation who own the copyright for the material. This field will not display online.

General Rules

3.10.3 You also have the option to enter “Consult owning institution for copyright holder contact information.”

Example Jane.Doe@hotmail.com

3.11 Copyright Notice

If copyrighted, copyright statement as it appears in the work. This is different from the Copyright Statement field above, which requires one of our three boilerplate statements.

General Rules

3.11.1 Enter the copyright statement as it appears in the work.

3.12 Internet Archive URL

Please provide the Internet Archive URL for the object if it already exists on the Internet Archive. This field will not display online.

3.13 ARK Identifier

Please provide the ARK (Archival Resource Key) Identifier for the object if there is one created. This field will not display online.

3.14 OCLC Number

OCLC identification number used to sync records in WorldCat. This field will not display online.

4. Metadata Fields Used After Submission

4.1 Partner QC Notes

Please leave any questions, feedback, comments, or concerns about the digitized object for CA-R team and/or vendor. **This field should not be filled in until the QC process.** This field will not display online.

4.2 Revision Log Message

Add a summary of the fields that you edited when you update a record in the repository. e.g. “Changed created date due to new information gleaned from object” or “Edited title to correct typo.” This will help us ensure your changes are reflected across all access platforms. This note will not display online.

5. Submission Examples

5.1 Examples of Published Metadata Records by Format

Format	Link to Example
<i>Book</i>	https://californiarevealed.org/islandora/object/cavpp%3A114430
<i>Photograph</i>	https://californiarevealed.org/islandora/object/cavpp%3A24457
<i>Correspondence</i>	https://californiarevealed.org/islandora/object/cavpp%3A68209
<i>Booklet</i>	https://californiarevealed.org/islandora/object/cavpp%3A68221
<i>Scrapbook</i>	https://californiarevealed.org/islandora/object/cavpp%3A40786
<i>Transcript</i>	https://californiarevealed.org/islandora/object/cavpp%3A178330
<i>Slide</i>	https://californiarevealed.org/islandora/object/cavpp%3A47766
<i>Flyer</i>	https://californiarevealed.org/islandora/object/cavpp%3A173449
<i>Poster</i>	https://californiarevealed.org/islandora/object/cavpp%3A39563
<i>Newspaper</i>	https://californiarevealed.org/islandora/object/cavpp%3A50027

5.2 Sample Nomination Records

Please refer to [these sample nomination records](#) for examples of Still Image and Text metadata records ready for submission to the CA-R Repository. Take note of the ways that the example inventory is consistently formatted for metadata records representing a variety of physical formats within a collection.

6. Metadata Resources and Controlled Vocabularies

CA-R creates records for Still Image and Text objects in the Dublin Core metadata schema, a descriptive standard for physical and digital resources. We work with digitization service providers to format descriptive,

rights, administrative, and technical metadata as a master XML metadata file to be “wrapped” with the digital object. The metadata record for each object will comprise all information relating to the original source, the master digital file, the associated sets of derivative digital files, and technical details regarding the transfer of the original source materials.

For more information regarding this process, review our [Statement of Work](#).

6.1 Dublin Core Resources

- An Introduction to the Dublin Core Metadata Schema
<https://www.dublincore.org/resources/metadata-basics/>
- Dublin Core Metadata Terms and Specifications
<https://www.dublincore.org/specifications/dublin-core/dcmi-terms/>

6.2 Descriptive Metadata Resources

- Description and Access: A Content Standard (DACS) from the Society of American Archivists
https://files.archivists.org/pubs/DACS_2019.0.3_Version.pdf
- Descriptive Cataloging of Rare Materials (DCRM) from the Rare Books and Manuscripts Section of the American Library Association
<https://rbms.info/dcrm/>
- Archives for Black Lives in Philadelphia’s Anti-Racist Description Resources
https://archivesforblacklives.files.wordpress.com/2019/10/ardr_final.pdf

6.3 Controlled Vocabularies

- Library of Congress Extended Date/Time Format
<https://www.loc.gov/standards/datetime/>
 - CA-R Metadata fields: 1.4 Created Date, 2.7 Temporal Coverage, 3.5 Published Date, 3.8 Copyright Date
- Library of Congress Name Authority File (LCNAF)
<https://id.loc.gov/authorities/names.html>
 - CA-R Metadata fields: 1.5 Creators and Contributors, 2.5 Subject (Entity), 2.6 Spatial Coverage, 3.6 Publisher, 3.7 Publication Location, 3.9 Copyright Holder
- MARC Code List for Relators Scheme
<https://id.loc.gov/vocabulary/relators.html>
 - CA-R Metadata fields: 1.5 Creators and Contributors
- Library of Congress Subject Headings (LCSH)
<https://id.loc.gov/authorities/subjects.html>
 - CA-R Metadata fields: 2.4 Subject (Topic)

- ISO 639.2 Codes for Names of Languages
https://www.loc.gov/standards/iso639-2/php/code_list.php
 - CA-R Metadata fields: 2.8 Language
- ISO 3166-1 Country Codes
<https://www.iso.org/obp/ui/#search>
 - CA-R Metadata fields: 2.9 Country of Creation