CALASYS
Metadata Guideline

Table of Contents

1.1 Element Descriptions ............................................................... 2
1.2. General Input Guidelines ......................................................... 2
  1.2.1. Punctuation ........................................................................ 2
  1.2.2. Abbreviations ................................................................. 3
  1.2.3. Capitalization ................................................................. 3
  1.2.4. Initial Articles ................................................................. 3
  1.2.5. Character Encoding ......................................................... 3
  1.2.6. Qualifiers ........................................................................ 3
1.3. Mandatory and Optional Elements .......................................... 4
2. CALASYS Metadata Core Element Descriptions ...................... 4
  2.1. Title ...................................................................................... 4
  2.2. Creator .................................................................................. 5
  2.3. Subject .................................................................................. 5
  2.4. Description ........................................................................... 7
  2.5. Publisher ............................................................................... 8
  2.6. Date ...................................................................................... 9
  2.7. Type ..................................................................................... 10
  2.8. Language ................................................................................ 11
  2.9. Format ................................................................................... 11
  2.10. Relation ............................................................................... 13
  2.11. Rights ............................................................................... 13
  2.12. Status ............................................................................... 14
1.1 Element Descriptions

The CALSYS Metadata Element descriptions include the following attributes that provide information about elements.

<table>
<thead>
<tr>
<th>Description Label</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Term Name</td>
<td>The unique name that identifies the element.</td>
</tr>
<tr>
<td>Label</td>
<td>The human-readable name used for public display of data.</td>
</tr>
<tr>
<td>Definition</td>
<td>A statement that represents the concept and essential nature of the element.</td>
</tr>
<tr>
<td>Mandatory</td>
<td>Specifies if the element is required by the CALSYS Metadata Guideline.</td>
</tr>
<tr>
<td>Repeatable</td>
<td>Specifies whether the element may be used more than once.</td>
</tr>
<tr>
<td>Refinements Schemes</td>
<td>Lists the refinements and schemes of the elements</td>
</tr>
<tr>
<td>Input Guidelines</td>
<td>Provides additional guidance about entering and encoding values for the elements.</td>
</tr>
<tr>
<td>Examples</td>
<td>Instances of how the element is used.</td>
</tr>
</tbody>
</table>

1.2. General Input Guidelines

Metadata creators should follow the general grammatical rules of the language involved when entering descriptive information about resources. In addition, it may be useful to consult the latest version of the RDA (Resource Description and Access), Describing Archives: A Content Standard (DAC), or Cataloging Cultural Objects (CCO) for more information and details on general rules and guidelines for data entry. The following are a few brief comments:

1.2.1. Punctuation

Avoid ending punctuation unless it is part of the content of the resource.
1.2.2. Abbreviations

In general, the following abbreviations are allowed: common or accepted abbreviations (such as “St.” for “Saint”); designations of function (such as “ed.” for “Editor”); terms used with dates (b. or fl.); and distinguishing terms added to names of persons, if they are abbreviated on the item (such as “Mrs.”). We suggest that abbreviations not be used if they would make the record unclear. In case of doubt, spell out the abbreviation.

1.2.3. Capitalization

In general, capitalize the first word (of a title, for example) and proper names (place, personal, and organization names). Capitalize content in the description element according to normal rules of writing. Acronyms should be entered in capital letters.

1.2.4. Initial Articles

**Omit** initial articles at the beginning of the title such as: the, a, an, le, la, los, el, der, die, das, etc.

1.2.5. Character Encoding

Have a clear understanding of how the database handles nonstandard characters and diacritics (such as ü, é, ñ, etc.) and input them so that they display and retrieve effectively.

1.2.6. Qualifiers

The elements described are intended to cover most of the information needed to give an adequate description of the digital resource. However, there is often a need to further refine information about a resource than can be expressed using the basic elements. To help remedy this, this guideline has adopted “Qualified” Dublin Core that consists of an element and additional qualifiers known as **refinements** and **schemes**. Recommendations for using qualifiers appear along with each element description.
1.3. Mandatory and Optional Elements
The CALSYS Metadata Guideline designated eight mandatory elements:

- Title
- Creator
- Subject
- Date
- Type
- Language (if applicable)
- Relation
- Rights

And several other optional elements such as:

- Publisher
- Description
- Format

2. CALSYS Metadata Core Element Descriptions

2.1. Title

Term Name: title
Label: Title/Article Title/Journal Title
Definition: The name given to the resource.
Comment: Typically, a Title will be a name by which the resource is formally known.
Mandatory: Yes
Repeatable: Yes

Refinements:

<table>
<thead>
<tr>
<th>Refinement Name</th>
<th>Refinement Label</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>alternative</td>
<td>Alternative</td>
<td>Any form of the title used as a substitute or alternative to the formal title of the resource</td>
</tr>
</tbody>
</table>

Input Guidelines:

If in doubt about what constitutes the title, repeat the Title element and include the variants in second and subsequent Title iterations. If the item is in HTML, view the source document and make sure that the title identified in the title header (if any) is also included as a Title. Alternative title will be input under preferred title in another “Title” field.
Notes: None.
Examples:

2009 CALA Award Banquet

2.2. Creator

Term Name: Creator
Label: Creator
Definition: An entity primarily responsible for making the content of the resource.
Comment: Examples of Creator include a person, an organization, or a service. Typically, the name of an Creator should be used to indicate the entity.

Mandatory: Yes, if available
Repeatable: Yes
Refinements: None
Schemes: None
Input Guidelines: Creators should be listed separately, preferably in the same order that they appear in the publication. Personal names should be listed surname or family name first, followed by forename or given name.

In the case of organizations where there is clearly a hierarchy present, list the parts of the hierarchy from largest to smallest, separated by full stops and a space. If it is not clear whether there is a hierarchy present, or unclear which is the larger or smaller portion of the body, give the name as it appears in the item.

Examples:
Creator = “Li, Tze-Chung”
Creator = “Chinese American Library Association Web Committee”

2.3. Subject

Term Name: subject
Label: Subject
Definition: A topic of the content of the resource.
Comment: Typically, Subject will be expressed as keywords, key phrases, or classification codes that describe a topic of the resource. Recommended best practice is to select a value from a controlled vocabulary or formal classification scheme.
Mandatory: Yes
Repeatable: Yes
Refinements: None
Schemes: It is strongly recommended that subject words and phrases come from established thesauri or discipline-related word lists
The list below includes most of the major thesauri, but more exist. Caution: Before opting to use terms from a thesaurus other than ones listed below, carefully consider if selected thesauri will be acceptable to any potential partners with whom you may share your records.

<table>
<thead>
<tr>
<th>Scheme Name</th>
<th>Scheme Label</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>LCNAF</td>
<td>LCNAF</td>
<td>LC Name Authorities File <a href="http://authorities.loc.gov">http://authorities.loc.gov</a></td>
</tr>
<tr>
<td>LCSH</td>
<td>LCSH</td>
<td>Library of Congress Subject Headings</td>
</tr>
<tr>
<td>LCTGM</td>
<td>LCTGM</td>
<td>Thesaurus for Graphic Materials: TGM I, Subject Terms <a href="http://www.loc.gov/rr/print/tgm1/">http://www.loc.gov/rr/print/tgm1/</a></td>
</tr>
</tbody>
</table>

Other established thesauri or word lists include, but are not limited to:

<table>
<thead>
<tr>
<th>Scheme Name</th>
<th>Scheme Label</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAT</td>
<td>AAT</td>
<td>Art and Architecture Thesaurus <a href="http://www.getty.edu/research/conducting_research/vocabularies/aat/">http://www.getty.edu/research/conducting_research/vocabularies/aat/</a></td>
</tr>
<tr>
<td>AMG</td>
<td>AMG</td>
<td>Audiovisual Materials Glossary (AMG)</td>
</tr>
<tr>
<td>ATLA</td>
<td>ATLA</td>
<td>Religion Indexes Thesaurus</td>
</tr>
<tr>
<td>CHT</td>
<td>CHT</td>
<td>Chicano Thesaurus for Indexing Chicano Materials</td>
</tr>
<tr>
<td>ERICD:</td>
<td>ERICD:</td>
<td>Thesaurus of ERIC Descriptors <a href="http://www.ericfacility.net/extra/pub/thessearch.cfm">http://www.ericfacility.net/extra/pub/thessearch.cfm</a></td>
</tr>
<tr>
<td>FAST</td>
<td>FAST</td>
<td>Faceted Application of Subject Terminology <a href="http://fast.oclc.org/">http://fast.oclc.org/</a></td>
</tr>
<tr>
<td>GEOREFT</td>
<td>GEOREFT</td>
<td>GEORef Thesaurus</td>
</tr>
<tr>
<td>GMGPC</td>
<td>GMGPC</td>
<td>Thesaurus for Graphic Materials: TGM II, Genre and Physical Characteristic Terms <a href="http://www.loc.gov/rr/print/tgm2/">http://www.loc.gov/rr/print/tgm2/</a></td>
</tr>
<tr>
<td>GSAFD</td>
<td>GSAFD</td>
<td>Guidelines on Subject Access to Individual Works of Fiction, Drama, etc.</td>
</tr>
</tbody>
</table>
Input Guidelines:

Select subject keywords from the Title or Description information, or from within a text resource. If the subject of the item is a person or an organization, use the same form of the name as you would if the person or organization were a Creator or Contributor.

In general, choose the most significant and unique words for keywords, avoiding those too general to describe a particular item. Subject might include classification data if it is available (for example, Library of Congress Classification Numbers or Dewey Decimal numbers) or controlled vocabularies (such as Medical Subject Headings or Art and Architecture Thesaurus descriptors) as well as keywords.

When including terms from multiple vocabularies, use separate element iterations. If multiple vocabulary terms or keywords are used, either separate terms with semi-colons or use separate iterations of the Subject element.

Examples:

Subject="Chinese-American Librarians Association"

2.4. Description

Term Name: description
Label: Description
Definition: An account of the content of the resource.
Comment: Description may include but is not limited to: an abstract, a table of contents, reference to a graphical representation of content, or a free-text account of the content.
Mandatory: Yes
Repeatable: Yes
Refinements:
<table>
<thead>
<tr>
<th>Refinement Name</th>
<th>Refinement Label</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>abstract</td>
<td>Abstract</td>
<td>A summary of the content of the resource</td>
</tr>
<tr>
<td>tableOfContents</td>
<td>Table of Contents</td>
<td>A list of subunits of the content of the resource</td>
</tr>
</tbody>
</table>

**Input Guidelines:**

**TableofContents:** When a description of a resource consists of a list of the contents, whether from a menu or other mechanism, table Of Contents can be used to differentiate this list from descriptive text that is written in sentence form. This allows more options for display and indexing.

**Abstract:** Used when a description of a resource consists of a formal abstract. For implementations where formal abstracts are preferred, using the specific term allows the label to better reflect the level of the description.

### 2.5. Publisher

**Term Name:** publisher

**Label:** Publisher

**Definition:** An entity responsible for making the resource available.

**Comment:**
Examples of a Publisher include a person, an organization, or a service. Typically, the name of a publisher should be used to indicate the entity.

**Mandatory:** No

**Repeatable:** Yes

**Refinements:** None

**Schemes:** None

**Input Guidelines:**

The intent of specifying this field is to identify the entity that provides access to the resource. If the Author and Publisher are the same, do not repeat the name in the Publisher area. If the nature of the responsibility is ambiguous, the recommended practice is to use Publisher for organizations and Author for individuals.

**Examples:** ...
2.6. Date

Term Name: date
Label: Date
Definition: none
Comment: none
Mandatory: Yes, if applicable
Repeatable: Yes

Refinements:

<table>
<thead>
<tr>
<th>Refinement Name</th>
<th>Refinement Label</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>dateAccepted</td>
<td>Date Accepted</td>
<td>Date of acceptance of the resource (e.g. of thesis by university department, of article by journal, etc.)</td>
</tr>
<tr>
<td>dateCopyrighted</td>
<td>Date Copyrighted</td>
<td>Date of a statement of copyright</td>
</tr>
<tr>
<td>dateSubmitted</td>
<td>Date Submitted</td>
<td>Date of submission of the resource (e.g. thesis, articles, etc.)</td>
</tr>
<tr>
<td>datePublished</td>
<td>Date Published</td>
<td>Publication date of the resource (e.g. book, articles, etc.)</td>
</tr>
<tr>
<td>dateProduced</td>
<td>Date Produced</td>
<td>Production date of the resource (e.g. video, photo, etc.)</td>
</tr>
</tbody>
</table>

Schemes:

<table>
<thead>
<tr>
<th>Scheme Name</th>
<th>Scheme Label</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>W3CDTF</td>
<td>W3C-DTF</td>
<td>World Wide Web Consortium encoding rules for dates and times <a href="http://www.w3.org/TR/NOTE-datetime.html">http://www.w3.org/TR/NOTE-datetime.html</a></td>
</tr>
</tbody>
</table>

Input guidelines:

Enter dates in the form “YYYY-MM-DD” in accordance with the W3C Date Time Format (W3C-DTF) encoding scheme. Use a single hyphen to separate the year, month, and date components:

a. Year: YYYY (“1987” for the year 1987))

b. Year and month: YYYY-MM (“1987-07” for July 1897))

d. For a range of years:
   1. Before year: before YYYY (“before 1867”)
   2. After year: after YYYY (“after 1867”)
   3. YYYYs (“1970s”)

2.7. Type

Term Name: type
Label: Type
Definition: The nature or genre of the content of the resource.
Comment:
Type includes terms describing general categories, functions, genres, or aggregation levels for content. Recommended best practice is to select a value from a controlled vocabulary (for example, the DCMI Type Vocabulary [DCMI TYPE]).

Mandatory: Yes
Repeatable: Yes
Refinements: None
Schemes:

<table>
<thead>
<tr>
<th>Scheme Name</th>
<th>Scheme Label</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>DCMI Type</td>
<td>DCMI Type Vocabulary</td>
<td>DCMI Type Vocabulary <a href="http://dublincore.org/documents/dcmi-type-vocabulary/">http://dublincore.org/documents/dcmi-type-vocabulary/</a></td>
</tr>
</tbody>
</table>

Input Guidelines:

Some digital objects may involve more than one type, e.g., a manuscript collection may have text, image, sound, and interactive components. Use separate Type elements to enter multiple types or clearly separate each entry by a semicolon and a space within an element.

Examples:

Type="image"
Type="sound"
Type="text"
2.8. Language
Term Name: language
Label: Language
Definition:
A language of the intellectual content of the resource.
Mandatory: Yes (if a text item or an item with a spoken element)
Repeatable: Yes
Refinements: None
Schemes:

<table>
<thead>
<tr>
<th>Scheme Name</th>
<th>Scheme Label</th>
<th>Definition</th>
</tr>
</thead>
</table>

Examples:
Language="eng"
Language="ger"
Language="spa"

2.9. Format
Term Name: format
Label: Format
Definition: The physical or digital manifestation of the resource.
Comment:
Typically, Format may include the media type or the dimensions of the resource. Format may be used to describe the software, hardware, or other equipment needed to display or operate the resource. Examples of dimensions include size and duration. Recommended best practice is to select a value from a controlled vocabulary (for example, the list of Internet Media Types [MIME] defining computer media formats).
Mandatory: Yes
Repeatable: Yes
Qualifiers:
Refinements:

<table>
<thead>
<tr>
<th>Refinement Name</th>
<th>Refinement Label</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>extent</td>
<td>Extent</td>
<td>The size or duration of the resource</td>
</tr>
<tr>
<td>medium</td>
<td>Medium</td>
<td>The material or physical carrier of the resource</td>
</tr>
</tbody>
</table>

Schemes:

<table>
<thead>
<tr>
<th>Scheme Name</th>
<th>Scheme Label</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>IMT</td>
<td>IMT</td>
<td>Internet Media Type [<a href="http://www.iana.org/assignments/media-types/">http://www.iana.org/assignments/media-types/</a>]</td>
</tr>
</tbody>
</table>

Input Guidelines:

In addition to the specific physical or electronic media format, information concerning the size of a resource may be included in the content of the Format element if available. In resource discovery size, extent or medium of the resource might be used as a criterion to select resources of interest, since a user may need to evaluate whether they can make use of the resource within the infrastructure available to them.

When more than one category of format information is included in a single record, they should go in separate iterations of the element.

Examples:
Title="Dublin Core icon"
Type="Image"
Format="image/gif"
Format="4 kB"

Subject="Saturn"
Type="Image"
Format="image/gif 6"
Format="40 x 512 pixels"

Title="The Bronco Buster"
Creator="Frederic Remington"
Type="Physical object"
Format="bronze"
Format="22 in."
2.10. Relation
Term Name: relation
Label: Citation
Definition: A reference to a related resource
Comment: Used for published articles to identify the citation.
Mandatory: Yes
Repeatable: Yes
Qualifiers: none
Input guidelines: Input as the format: Journal Title, Volume number, Issue number, page.
Example:
Relation = “CALSYS IRS Pilot Project”

2.11. Rights
Term Name: rights
Label: Rights
Definition: Information about rights held in and over the resource.
Comment: Typically, a Rights Management element will contain a rights management statement for the resource, or reference a service providing such information. Rights information often encompasses intellectual property rights (IPR), copyright, and various property rights.
Mandatory: Yes
Repeatable: Yes
Qualifiers: None
Input Guidelines: The Rights element may be used for either a textual statement or a URL pointing to a rights statement, or a combination, when a brief statement and a lengthier one are available.
Notes: CALSYS requires that rights information be provided for all materials submitted.
Example:
Rights = "This resource may be copyright-protected. You may make use of this resource, with proper attribution, for educational and other non-
2.12. Status

Term Name: Status
Label: Publishing Status
Definition: Information about if the intellectual work is officially accepted by any publishing body
Comment: None
Mandatory: Yes
Repeatable: Yes
Qualifiers: None
Refinements: None
Schemes: None

Input Guidelines:
The Rights element may be used for either a textual statement or a URL pointing to a rights statement, or a combination, when a brief statement and a lengthier one are available.
Notes: CALSYS requires that rights information be provided for all materials submitted

Example:
Status = “Published”
Status = “Non published” (“grey publications”)

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