CUL Digital Collections: Filenaming, Workflow, and Metadata Guidelines

FRAMEWORK FOR BUILDING A COLLECTION: VERSION 4
Preface

Cataloging has formed the foundation of library services since the inception of this profession, allowing patrons to find the resources that best meet their information needs. In the 20th century, the development of a global shared catalog (WorldCat) from libraries around the world provided a wonderful example of international cooperation unparalleled in most other spheres of public life.

Over the years, library science has been transformed in the digital environment. The creation of metadata schema and cataloging guidelines for digitized resources has led to a plethora of options. Using customized metadata that diverges from trusted standards like AACR2/RDA, however, necessitates the creation of new guidelines to maintain consistency within digital collections.

In 2008, the Norwick Center for Digital Services created the first version of what was then called the SMU CONTENTdm Guide: Framework for Building a Collection. Version 1 described how SMU Central University Libraries (CUL) create metadata for digital collections made available online in CUL Digital Collections, along with the information architecture that underpins their structure. Throughout the years, our goal has been to capture metadata in a way that builds on the best of existing cataloging rules, while adding new styles that enhance the unique nature of our digital collections.

Version 4, introduced in January 2016, contains some of the most significant changes we have ever made. Even the title of the document has been renamed. Most notably, we are incorporating the use of new controlled vocabularies and adding fields, which we believe will help us better prepare CUL metadata for the future linked data universe—a world in which we very much want to participate.

Cindy Boeke, Digital Collections Librarian
Norwick Center for Digital Services
Central University Libraries, SMU
Introduction

The CUL Digital Collections: Filenaming, Workflow, and Metadata Guidelines: Framework for Building a Collection, Version 4 (V.4) was prepared by the Norwick Center for Digital Services (nCDS) staff of Southern Methodist University’s Central University Libraries (SMU/CUL) to provide guidelines for creating and cataloging CUL Digital Collections in CONTENTdm using customized fields based on the Dublin Core Metadata Element Set. The guide explains CUL’s file-naming architecture, which allows CUL Digital Collections to precisely match the physical collection online and in the digital archive. The cataloging guidelines include the name, description, and style of each custom metadata field, as well as its mapping to a Dublin Core element; whether the field is mandatory, public, and/or searchable; mapping to a MARC 21 Format for Bibliographic Data field; and examples.

The guidelines are designed so that catalogers of all levels can build digital collections. At the same time, the framework is extensible: Field names can be changed and custom fields can be added as needed, based on the requirements for each collection; metadata that has been created previously; and the level of cataloging that is desired.

We recognize that each digital collection is unique, and the requirements of a particular collection may necessitate the development of metadata guidelines that vary somewhat from those recommended here. However, the goal of the guidelines described in this document is to enhance standardization within and between collections. When deviations from the guidelines are extensive, they should be documented in a specialized metadata profile that is included in the project documents for that collection. nCDS works with CUL special collections curators to create the best model for presenting the resources and metadata digitally.

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## Administrative Metadata

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<tr>
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<td>7.4 Upload File Name</td>
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<td>7.5 Archival File Name(s)</td>
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<td>7.6 Digital Collection</td>
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<tr>
<td>7.7 Library</td>
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<tr>
<td>7.8 Publisher</td>
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<td>7.9 Rights</td>
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<td>7.10 Tags</td>
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## Appendix A: Definitions

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<th>Appendix A: Definitions</th>
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<td>A.1 Notes Field</td>
<td>110</td>
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<tr>
<td>A.2 Physical Description Field</td>
<td>113</td>
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<tr>
<td>A.3 Form/Genre Field</td>
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</table>
Chapter 1: Metadata Quick Reference Guide

Note: Always refer to and follow the guidelines in 4.2 Style Guidelines for Cataloging when creating CUL Digital Collections metadata records.

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<th>M</th>
<th>P</th>
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<th>Description &amp; Examples</th>
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<td>Name given to the resource by the creator, publisher, or cataloging agency. Titles may be created by the cataloger when necessary. Railroad collection items have a specified style, when created by the cataloger.</td>
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<td></td>
<td></td>
<td></td>
<td>- Arapahoe County Map</td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td>- Freehold (252 feet) Level, looking North. 21st May, 1902.</td>
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<tr>
<td></td>
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<td>- [Cowboys in Front of Small House with Thatch Roof on Ranch]</td>
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<td>- El Presidente de la Republica a su llegada al campo de la revista.</td>
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<td>- American Indians: First Families of the Southwest, [cover]</td>
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<td>- American Indians: First Families of the Southwest, [pages 20 and 21]</td>
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<td>- [La Decena Tragica, front cover]</td>
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<td>- [Atlantic Coast, Locomotive 2003]</td>
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<td>- [Chicago, Burlington &amp; Quincy, &quot;Missouri&quot; Locomotive and Tender]</td>
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### Alternative Title

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<td>[Ferrocarril del Sureste, Pullman Sleeping Car 7813-12, &quot;Tacotalpa&quot;]</td>
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<td>[Southern Railway Depot, Tusculumia, Alabama]</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>[Texas &amp; Pacific Railway, South Mansfield Depot, Mansfield, Louisiana]</td>
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<td></td>
</tr>
</tbody>
</table>

Alternative name given to the resource by the creator, publisher, or cataloging agency, including translated titles. Alternative titles created by the cataloger are in brackets, except for direct translations.

- [Harrison's Landing, Virginia, (left to right) Colonel Albert V. Colburn, Colonel Delos B. Sacket, and General John Sedgwick]
- [Umbrella Rock at Point Lookout, Tennessee]
- Interior of the Veracruz Railroad Station

### Creator

<table>
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<tr>
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<th>Y</th>
<th>Y</th>
<th>Y</th>
</tr>
</thead>
</table>

Person or entity primarily responsible for creating the intellectual content of the resource.

**Shared Controlled Vocabulary for Creator and Contributor(s)**

- Hillyer, H. B. (Hamilton Biscoe), 1835-1903
- Roche, Thomas C., 1826-1895
- Barnard, George N., 1819-1902
- Gardner, Alexander, 1821-1882
- Biscoe, Thomas Dwight, 1840-1930
- Unknown

### Contributor(s)

<table>
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<th>Y</th>
<th>Y</th>
</tr>
</thead>
</table>

Person or entity whose contribution to the creation of the resource is significant but secondary to that of any person or entity specified in the Creator field, such as publisher, editor, transcriber, annotator.

**Shared Controlled Vocabulary for Creator and Contributor(s)**

- E. & H.T. Anthony (Firm)
- Underwood & Underwood
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<td></td>
<td></td>
<td>- 1906</td>
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<td></td>
<td></td>
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<tr>
<td></td>
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<td>- ca. 1980-1985</td>
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<td></td>
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<td>- 1876-09-19</td>
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<tr>
<td></td>
<td></td>
<td>- 2011-06</td>
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<td></td>
<td></td>
<td>- 1900</td>
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<td></td>
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<td>- 2012~</td>
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<tr>
<td></td>
<td></td>
<td>- 1999?</td>
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<td>- 1809-09-01/1810-10-01</td>
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<td>- 192x/193x</td>
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<td>- {1918-09-06, 1918-09-18}</td>
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<table>
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<th>The decade during which the original resource was created. Include no more than two decades.</th>
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<tr>
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<td><strong>Shared controlled vocabulary.</strong></td>
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<tr>
<td></td>
<td></td>
<td>- 1910-1919</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- 1890-1899; 1900-1909</td>
</tr>
</tbody>
</table>
| **Part Of** | Relation-IsPartOf | Y | Y | Y | The title of the accession to which the original resource belongs, obtained directly from the MARC record. In some cases, it may need to be shortened. Optional: use date from Marc 245 |f field, when available.  

*Shared controlled vocabulary.*  
- Alexander Gardner cartes de visite and portraits  
- Collection of Carleton E. Watkins western stereoscopic views  
- Destruction of New Laredo Mexico April 24, 1914  
- All the western states and territories, from the Alleghanies to the Pacific, and from the Lakes to the Gulf, containing their history from the earliest times ... |
| **Series** | Relation-IsPartOf | N | Y | Y | The series within a collection to which the resource belongs; a more granular description than the Part Of field. A series can be obtained from the item or derived from the cataloger.  

*Shared controlled vocabulary.*  
- Scenery of the Yellowstone National Park  
- Broad Panel Views, Yellowstone Park  
- History of the Indian tribes of North America, Volume 1  
- Series 8: Photograph Albums, 1907-1969  
- Landscapes, China and India, 'Eves' and Garden, 1937, album  
- Album 4, Hardinge Bridge Construction, India |
| **Page Number** | Relation-HasPart | N | Y | Y | Page number from book or album. Use a sufficient number of digits to ensure sort order.  

- p. 000 (denotes a cover)  
- p. 002  
- p. 159 |
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<td></td>
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</tr>
<tr>
<td>Geographic location depicted in the item. When known, use city, county, state/territory; use country when not in the United States.</td>
<td></td>
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<tr>
<td></td>
<td></td>
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</tr>
<tr>
<td>• Dallas, Dallas County, Texas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Maryland Heights, St. Louis County, Missouri</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• New Orleans, Orleans Parish, Louisiana</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Mount Morgan, Queensland, Australia</td>
<td></td>
<td></td>
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<tr>
<td>• Mexico City (Mexico D.F.), Mexico</td>
<td></td>
<td></td>
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<tr>
<td>• Paksey, Bangladesh</td>
<td></td>
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<tr>
<td>• Mexican-American Border Region</td>
<td></td>
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<tr>
<td>• Veracruz, Veracruz state, Mexico</td>
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<table>
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<tr>
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<th>Description</th>
<th>N   Y   Y</th>
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<tbody>
<tr>
<td>In this typewritten speech, Dr. Hyer discusses the role education plays in a democracy to help citizens realize their full potential.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• This photograph is part of the Cananea, Mexico collection which includes 21 photographs of Cananea, Mexico, located just across the Arizona border, showing striking miners, armed men, demonstrations, the mine site, and American company employees.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• This photograph is from an album of photographs of the Mount Morgan Mine, showing views of the mines, mining equipment, mining structures, reduction works, workers and town.</td>
<td></td>
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</tr>
<tr>
<td>• Inside the steam pump room at the water station in Lemberg.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>• This 13th edition of the booklet promoting the Fred Harvey Company's Indian Building was most likely distributed to eastbound passengers on the Santa Fe Railway's California Limited train. The illustration in the center is also featured above the arches on the Indian and Mexican Building in Albuquerque, NM. There is no publication date given, but library markings indicate this booklet as published in 1904. Source: Carrie Johnston, English PhD candidate, SMU, 2013.</td>
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</tr>
<tr>
<td></td>
<td>Annotations that provide additional information about the attributes of the resource; a less formal description of the item, written using free text and/or sentence fragments.</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Verso: [stamped] Blessing &amp; Brother, Gallery, Main Street, Houston-Texas.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Notebook 1 has 163 pages. From the collection of Minas del Compromiso de Vetagrande records, 1788-1809. Three notebooks and one folder of 8 loose leaves. Each item also has been digitized as a .pdf. Material is in Spanish.</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Title obtained from previous page. Restricted access.</td>
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</tr>
<tr>
<td></td>
<td>Date refers to date original photograph was taken; copy negative made later.</td>
<td></td>
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<tr>
<td></td>
<td>Date obtained from stamp box. Recto: [imprinted on negative] Planted by Us, Texas Nursery Co 24.</td>
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### Related Resources

| | MARC record: [http://libcat.smu.edu/vwebv/holdingsInfo?bibId=3228961](http://libcat.smu.edu/vwebv/holdingsInfo?bibId=3228961)
| | MARC record: [http://libcat.smu.edu/vwebv/holdingsInfo?bibId=1855495](http://libcat.smu.edu/vwebv/holdingsInfo?bibId=1855495)

### Authorized Subject Terms

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<th>Use prescribed controlled vocabularies to describe the main subject(s) in the item. Use semi-colons between terms.</th>
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</table>

**Shared Controlled Vocabulary**

- Queensland--Mount Morgan; Mines and mineral resources; Mining engineering
- Business enterprises; Cities and towns; Office buildings; Adolphus Hotel (Dallas, Tex.)
- Railroad bridges--Design and construction; Railroads
- Floods; Flood damage; Natural disasters; Railroad bridges; Railroad tracks; Texas & Pacific Railway; Trestles; Texas--Trinity River; 1908 Trinity River Flood
- Southern Methodist University; College student newspapers and periodicals; College students
- Mexican War, 1846-1848; United States. Army; Chapultepec, Battle of, Mexico City, Mexico, 1847; Quitman, John Anthony, 1798-1858
- Johnson, Lyndon B. (Lyndon Baines), 1908-1973; Democratic Party (U.S.); American presidential elections; Political campaigns; Presidential candidates; Political candidates; Political slogans

**Link to important terms to use**
### Keywords

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</tr>
<tr>
<td>RPPC; downtown; skyline; Southwestern Life Building; Great Southern Life Building; Praetorian Building</td>
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<td>RPPC; T&amp;P; TP</td>
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<td>SMU</td>
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<td></td>
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<tr>
<td>Mexican-American War; U.S. Army; U.S. Mexico Border</td>
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**Link to important keywords to use**

### Original Media

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<tr>
<td>Original resource provided as: ceramic sculpture</td>
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</tr>
<tr>
<td>Original resource provided as: printed newsletter</td>
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### Physical Description

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<td></td>
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<td>1 photograph: sixth plate tintype, hand-colored; 9 x 8 cm (case)</td>
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<td>1 photographic print: albumen; 20 x 25 cm</td>
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<tr>
<td>1 photographic print: gelatin silver; 13 x 21 cm</td>
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<td>1 photomechanical print: color; 28 x 21 cm</td>
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<td>1 photographic print: gelatin silver; 16 x 21 cm on 25 x 33 cm mount</td>
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<tr>
<td>1 photographic print; gelatin silver, part of 1 volume (42 gelatin silver prints); 24 x 29 cm on 30 x 41 cm mount</td>
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<tr>
<td>1 volume (104 albumen prints); 27 x 40 cm</td>
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<tr>
<td>1 album cover: part of 1 volume (75 gelatin silver prints); 31 x 42 cm</td>
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<tr>
<td>1 photographic print on stereo card: stereograph, albumen; 9 x 18 cm</td>
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**Form/Genre**

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<th>Y</th>
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</thead>
<tbody>
<tr>
<td>Medium</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
</tbody>
</table>

Categorization of the original resource based on characteristics such as its function, intended purpose, method of representation, or type of content.

*Shared controlled vocabulary.*

- Photographs; Photographic prints; Photograph albums; Albumen prints
- Photographs; Photographic prints; Portrait photographs; Card photographs; Cartes de visite
- Photographs; Photographic prints; Photographic postcards; Gelatin silver prints
- Photographs; Ambrotypes; Portraits; Photograph cases
- Photograph albums; Photograph album covers; Photographs; Photographic prints; Gelatin silver prints
- Drawings; Pencil works; Metalwork
- Slides; Bronze; Metals; Metalwork; Sculpture
- Motion pictures; Video recordings
- Sound recordings; Concerts
- Design drawings; Contract drawings; Proposed works
- Badges; Memorabilia

**Railway Identifier**

<table>
<thead>
<tr>
<th>Description</th>
<th>N</th>
<th>Y</th>
<th>Y</th>
</tr>
</thead>
</table>

Free-text field used to describe the railroad’s short line nickname or the nickname of the car.

- Sunset Limited
- Guthrie & Company
- Villa del Mar
- Cusi
- Felipe Carrillo Puerto
<table>
<thead>
<tr>
<th>Locomotive/Car Number</th>
<th>Description</th>
<th>N</th>
<th>Y</th>
<th>Y</th>
<th>The locomotive or car number.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Locomotive 2003</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Locomotive 122</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Car 06</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Car 3627</td>
</tr>
<tr>
<td>Railway Line</td>
<td>Description</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
<td>Name of the railway company.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Controlled vocabulary.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Atlantic Coast Line Railroad Company</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>St. Louis &amp; San Francisco Railway Company</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>International &amp; Great Northern Railroad</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Alabama &amp; Vicksburg Railway</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Chicago &amp; North Western Railway Company</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Ferrocarriles Nacionales de Mexico</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Ferrocarril Chihuahua al Pacifico</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Gobierno Federal Mexicano</td>
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</tbody>
</table>

**Technical Metadata**

<table>
<thead>
<tr>
<th>Digital Resource Type</th>
<th>Type</th>
<th>Y</th>
<th>Y</th>
<th>Y</th>
<th>Categorization of the digitized resource based on the type of object it is.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Image</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Text</td>
</tr>
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<td></td>
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<td></td>
<td></td>
<td>Video</td>
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<td></td>
<td>Audio</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Printed music</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Digitization Date</th>
<th>Date-Issued</th>
<th>Y</th>
<th>Y</th>
<th>N</th>
<th>Year in which the digital resource was created.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Digitized: 2015</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Digitized: 2016</td>
</tr>
</tbody>
</table>
## Digital Format

<table>
<thead>
<tr>
<th>Y</th>
<th>Y</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic characteristics such as file size, dimensions, duration, etc., of the derivative file uploaded to CONTENTdm or into SoundCloud or Vimeo. When referring to file types, use period followed by file extension.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>Displayed as .jp2; uploaded as .jpg</td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>Displayed as .pdf; 3 pages, 1.5 MB</td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>Displayed as .mov streaming file embedded in .html page</td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>TRT 00:10:08.30; Streaming File: Presented in Vimeo as 640 x 480</td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>Displayed as .mp3 streaming file embedded in .html page; TRT (Track 1) 00:12:36, 192 kbps, MPEG Layer 3 Audio, 17.3 MB; TRT (Track 2) 00:36:57, 192 kbps, 50.7MB; Streaming file presented in Soundcloud</td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>Displayed as .mov streaming file embedded in .html page; TRT: 00:42:58; MPEG-4 AVC, H.264, Quicktime; Aspect Ratio: 16:9, pillarbox; Resolution: 1920 x 1080; Frame rate: 23.98 fps; Audio: Mono, PCM, 48 khz, 16 bps; 10.3 GB; Streaming file presented in Vimeo</td>
<td></td>
</tr>
</tbody>
</table>

## Archival File Resolution

<table>
<thead>
<tr>
<th>N</th>
<th>Y</th>
<th>Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>The pixel array, bit depth information, and color space of the archival file (width x height).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>Archival scan: 6400 w x 4800 h pixels, 48-bit RGB</td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>Archival scan: 3018 w x 4903 h pixels, 48-bit RGB (recto); 3020 w x 4900 h pixels, 48-bit RGB (verso)</td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>Archival file: 5616 w x 3744 h pixels</td>
<td></td>
</tr>
</tbody>
</table>

## Digitization Process

<table>
<thead>
<tr>
<th>Y</th>
<th>Y</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>The technical information about the hardware, software, and processes used to create the archival and upload files.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>For flatbed scanning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>Digitization process: Master scanned using Epson V750 Pro as 600 ppi, 48-bit, RGB .tif; derivative resampled as 3000 w pixels, 24-bit .jpg</td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>Digitization process: Master scanned using Epson V750 Pro as 1200 ppi, 48-bit, RGB .tif; service master color corrected and cropped; derivative resampled as 3000 w pixels, 24-bit .jpg</td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>Digitization process: Recto and verso each scanned using Epson V750 Pro as 600 ppi, 48-bit, RGB .tif; recto and verso files combined to make composite derivative and resampled as 3000 w pixels, 24-bit, RGB .jpg</td>
<td></td>
</tr>
</tbody>
</table>
Digitization process: Master scanned using an Epson 750 as 1200 ppi, 48-bit, RGB .tif; service master changed to black and white, hues and contrast adjusted, and cropped; derivative resampled to 3000 w pixels, 24-bit .jpg

Digitization process: Master scanned using Epson V750 Pro as 600 ppi, 48-bit, RGB .tif; derivative resampled as 3000 pixels on the long edge, 24-bit .jpg

Digitization process: Scanned using an Epson 750 as 1200 ppi, 48-bit, RGB, .tif; service master adjusted and cropped; derivative resampled to 3000 pixels on the long edge, 24-bit .jpg

For .pdf files

Digitization process: Pages scanned as 600 ppi, 48-bits per channel, RGB .tif files; .pdf created and compressed in Adobe Acrobat; 3 pages, 1.5 MB

Digitization process: Archival photographs of each page created at 16352 w x 12264 h pixels; pages cropped and resized in Photoshop; .pdf created and optimized in Acrobat with .jpg derivatives; 32 pages, 19.6 MB

For Bookeye scanner

Digitization process: Master scanned using Bookeye scanner as 9071 w x 7370 h pixels, 24-bit, RGB .tif; scan cropped to a 5000 w x 3000 h pixels, 24-bit, RGB .tif; master file cropped and resampled as 3000 w pixels, 24-bit, RGB .jpg

Digitization process: Scanned with Bookeye scanner, master file cropped to 4280 w x 5702 h pixels and saved as 380 ppi, 16-bit .tif; derivative resized to 3000 w pixels and resaved as 8-bit .jpg

For digital photography

Digitization process: Photographed using a Hasselblad H4D-200MS as 48-bit, RGB, .tif file; derivative cropped and resampled to 3000 pixels on the long edge, 24-bit .jpg
For digital audio/video recordings

- Digitization process: Received as 16 mm film; transferred to DV format using telecine; web file compressed in Quicktime Pro using AAC Stereo and h.264 (768 kbps), saved as MPEG-4
- Digitization process: Digital master video file created from original media as 24p capture from HD camera with direct, line level audio from magnetic soundtrack. Compressed and edited in Adobe Premiere

**Administrative Metadata**

<table>
<thead>
<tr>
<th>Physical Location</th>
<th>Relation-IsPartOf</th>
<th>N</th>
<th>Y</th>
<th>Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information concerning box, series, and other archival storage details.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Box 3, Folder 21</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>- Cabinet 1, Drawer 1</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Call Number</th>
<th>Identifier</th>
<th>Y</th>
<th>Y</th>
<th>Y</th>
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</thead>
<tbody>
<tr>
<td>Call number of the original resource from which the digital object was derived or created.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Ag1982.0231</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>- E83.89.M55 1891</td>
<td></td>
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<tr>
<td>- Folio-2 F804.T2 A93</td>
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<tr>
<td>- Broadside KFT1600.5 1836.A3</td>
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<tr>
<td>- Pamphlet HE2791.H242 1880</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Mss 0060</td>
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</table>

<table>
<thead>
<tr>
<th>Identifier</th>
<th>Identifier</th>
<th>N</th>
<th>Y</th>
<th>Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generally retired, but reserved for special identifying information (e.g., ISBN, file name, character string, reference URL; or derived sequence for sorting).</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- om_01_06_om_2013_1</td>
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</tbody>
</table>
### Upload File Name

<table>
<thead>
<tr>
<th>Identifier</th>
<th>Name</th>
<th>Exception: .html</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y</td>
<td>ag2005_0001_01_brackettville_001c_opt.jpg</td>
<td></td>
</tr>
<tr>
<td>Y</td>
<td>ephemera_c920_opt.pdf</td>
<td></td>
</tr>
<tr>
<td>Y</td>
<td>ag1986_0583_04_opt.jpg</td>
<td></td>
</tr>
<tr>
<td>Y</td>
<td>ag2005_0004_04_seward_opt.jpg</td>
<td></td>
</tr>
<tr>
<td>Y</td>
<td>ag2001_136_01_r_opt.jpg</td>
<td></td>
</tr>
<tr>
<td>Y</td>
<td><a href="http://digitalcollections.smu.edu/all/cul/">http://digitalcollections.smu.edu/all/cul/</a> ttb/stream/ ttb_13_stream.html</td>
<td></td>
</tr>
</tbody>
</table>

### Archival File Name(s)

<table>
<thead>
<tr>
<th>Relation-IsVersionOf</th>
<th>Name of file(s) from which optimized upload derivative was derived, including three-letter file extension.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y</td>
<td>ag1983_0282_01.tif</td>
</tr>
<tr>
<td>Y</td>
<td>ag1983_0282_01.tif; ag1983_0282_01_sm.tif</td>
</tr>
<tr>
<td>Y</td>
<td>ag1982_0122x_35.CR2; ag1982_0122x_35_sm.tif</td>
</tr>
<tr>
<td>Y</td>
<td>ag2001_136_01_r.tif; ag2001_136_01_v.tif</td>
</tr>
<tr>
<td>Y</td>
<td>ttb_13_miracleinharlem_up.mp4</td>
</tr>
</tbody>
</table>

### Digital Collection

<table>
<thead>
<tr>
<th>Relation-IsPartOf</th>
<th>The name of the digital collection to which the item belongs.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y</td>
<td>Shared controlled vocabulary.</td>
</tr>
<tr>
<td>Y</td>
<td>Texas Artists: Paintings, Sculpture, and Works on Paper</td>
</tr>
<tr>
<td>Y</td>
<td>JCPenney Dynamo Newsletters</td>
</tr>
<tr>
<td>Y</td>
<td>Tyler, Texas Black Film Collection</td>
</tr>
<tr>
<td>Y</td>
<td>Hervey A. Priddy Collection of American Presidential and Political Memorabilia</td>
</tr>
<tr>
<td>Y</td>
<td>George W. Cook Dallas/Texas Image Collection</td>
</tr>
<tr>
<td>Y</td>
<td>Mexico: Photographs, Manuscripts, and Imprints</td>
</tr>
<tr>
<td>Y</td>
<td>Potter Art Iron Studios Collection</td>
</tr>
</tbody>
</table>
## Library

**Library**  
The library or office to which the original resource belongs.

<table>
<thead>
<tr>
<th>Library</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bywaters Special Collections; Hamon Arts Library</td>
</tr>
<tr>
<td>G. William Jones Film and Video Collection; Hamon Arts Library</td>
</tr>
<tr>
<td>DeGolyer Library</td>
</tr>
<tr>
<td>SMU Archives</td>
</tr>
<tr>
<td>Edwin J. Foscue Map Library</td>
</tr>
<tr>
<td>Fort Burgwin Library (SMU-in-Taos)</td>
</tr>
<tr>
<td>Government Information Resources</td>
</tr>
<tr>
<td>Hamon Arts Library</td>
</tr>
</tbody>
</table>

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## Publisher

**Publisher**  
An entity or entities responsible for the digital publication of the item.

<table>
<thead>
<tr>
<th>Publisher</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central University Libraries, Southern Methodist University</td>
</tr>
<tr>
<td>Frank Smith, Jr. Library Center, Southwestern University (Georgetown, TX)</td>
</tr>
</tbody>
</table>

---

## Rights

**Rights**  
A rights management statement that contains information concerning accessibility, reproduction of images, copyright holder, restrictions, securing permissions for use of text or images, etc. These are core examples, but check for variants depending on each library.

<table>
<thead>
<tr>
<th>Rights</th>
</tr>
</thead>
</table>
| Statement 1  
Please cite DeGolyer Library, Southern Methodist University when using this file. A high-resolution version of this file may be obtained for a fee. For details see the https://sites.smu.edu/cul/degolyer/research/permissions/ web page. For other information, contact degolyer@smu.edu. |
| Statement 2  
This item may be protected by copyright law. Please cite Bywaters Special Collections, Southern Methodist University when using this file. For more information contact bywatersspecialcollections@smu.edu. |
## Tags

<table>
<thead>
<tr>
<th>None</th>
<th>Y</th>
<th>N</th>
<th>Y</th>
<th>This is a hidden searchable field.</th>
</tr>
</thead>
</table>

*Shared controlled vocabulary.*

- cul_september_2012; John_M; Carol_M
- cul_march_2013; compound_object; John_M
- cul_november_2015; john_m; margaret_c_cat
- cul_december_2015; john_m; Eldric_B
Chapter 2: Creating Digital Images

2.1 Digital Image File Formats

Three types of files are used in nCDS image digitization projects:

- A **master** is a high-quality, unaltered, digitized image file.

  All master files are saved in either the .tif (Tagged Image File Format) or the .CR2 (Canon Raw Image) format.

- A **service master** is an optimized copy of the master scan that retains the quality and resolution of the master file. The service master is saved separately from the master file.

  All service master files are saved in the .tif format.

- A **derivative** is created from the master, the service master, or another derivative and is optimized to meet the requirements of its intended end use.

  All files that are uploaded to CONTENTdm are derivatives. *Upload derivatives* are always saved in the .jpg (Joint Photographic Experts Group) format. Master .tif, service master .tif or derivative .jpg files are may be merged into a .pdf (Portable Document Format) file that is optimized for upload, i.e. less than 20 MB.

2.2 Digital Image Optimization

Optimizations must be made in consultation with the collection curator or nCDS director.

Any optimizations must be noted in the Digitization Process metadata field for the image.
If the master file does not require optimization, the creation of a service master is unnecessary.

Optimization of a derivative file can include alterations such as straightening, rotating, cropping, sharpening, resizing, and/or reformatting. All upload derivatives are resized to 3000 pixels on the long edge and saved as .jpg files. Exception: For items that may be under copyright, but are not being uploaded with restricted access, please upload a derivative that is 750 pixels on the long edge.

If an image requires only cropping and resizing, a derivative can be made from the master file.

A service master is created when an image requires more advanced alterations such as color and/or exposure correction, straightening, rotating, cropping, and sharpening. In these cases, the derivative is made from the service master.

2.3 Naming Digital Files

Appropriate nCDS staff members will work with each collection curator to adopt an existing file-naming scheme or to develop a new file-naming scheme for collections that have not already been digitized.

For new digital collections, we recommend the adoption of a descriptive file-naming scheme.

The overall goal of file naming is to allow the items to sort in a pre-determined sequential order. Typically, the upload file name is used as the sort mechanism in the digital collection.

It is crucial to examine each accession before digitization and determine the desired overall sort order. Even if only a few items from the collection are being digitized, as in the case of a reproduction order, the file-naming scheme should be designed to produce the desired sort order for the collection as a whole.

When the sort order is complex, create a .txt file for the accession that documents the information to be included in the file name, so others can understand and follow that order.

File naming is based on the following order: (1) call number; (2) item number; (3) optional descriptor; and (4) file type (extension).
For the call number segment, use lowercase letters and replace periods and spaces with an underscore.

For the item number, use the pagination or series number, if it exists. Alternatively, the negative number or other information can be used as the item number. If there is no order built into the accession, the scan order can be used for numbering purposes.

Pad item numbers with leading zeros, using only the number of zeros required to accommodate the total number of items. For example, use 00-99 for collections with fewer than 100 items and 000-999 for collections with fewer than 1000 items.

Use zeros to number covers. For example, the cover of a 25-page album would be numbered 00, with the first page numbered 01, the second page 02, etc.

File names can be customized to accommodate the need to match numbers with pages. Depending on how the item is paginated, the fronts and backs of pages can be designated with recto and verso (e.g., 01r and 01v), or the fronts and backs can be designated with separate numbers (e.g., 01 and 02).

When the letter r is used to specify recto, v to indicate verso, or c to indicate composite, precede the letter with an underscore. Note: The underscore may have been omitted from earlier file names (e.g., ag2005_0003_0021v_7052.tif). Leave existing file names as is.

**Examples:**

- ag2003_0136_01_r.tif
- ag2003_0136_01_v.tif

Sometimes it is necessary to build in a series, box, or folder number and/or other sort information such as city or railway line. Typically, place the larger unit number, e.g. series, box, folder, preceded by an underscore before the item number and descriptive information, e.g. negative numbers, railway designators, keywords, after the item number, preceded by an underscore.

**Example:**

- The file name ag2000_1341_01_002_ranger.tif denotes call number Ag2000.1341, Box 1, and the second item from Ranger, Texas.
Optional: Add a descriptor such as a keyword to the file name.

Examples:

- The file name ag1985_0342x_01_loco426.tif reflects the locomotive number.
- The file name ag1982_0232_nwp_0001.tif includes the abbreviation for Northwestern Pacific Railroad (i.e., NWP). (Note: In this case, the railroad line forms part of the sort order.)

Specialized file names are often requested by individual libraries.

For DeGolyer Library projects, build the following object or physical location keywords into the beginning of the file names, if applicable. In every case, go by what is on the MARC record for that accession.

Object Type Keywords:
- broadside
- ephemera
- folio
- map
- mss (abbreviation for Manuscript)
- newspaper
- pams (abbreviation for Pamphlet)
- periodical

Physical Location Keywords:
- vault_ag1986_0515x_01_stanton_r.tif
- ephemera_c920.tif
- map_g5293_a5_1864_c6
- vault_folio_g159_p98
For *service masters*: Append the suffix \_sm to the file name, directly before the file extension.

For *optimized CONTENTdm upload derivatives, even if they are only compressed to .jpg format*: Append the suffix \_opt to the file name, directly before the file extension.

**Examples:**

* An accession with the call number Ag2001.0136 includes fewer than 100 items.
  
  * The *master* image file name is: ag2001_0136_01.tif
  
  * The *service master* file name is: ag2001_0136_01_sm.tif

  * Derivatives can then look like:

    ag2001_0136_01_sm_300ppi.tif
    *(300 ppi derivative, typically used for print publications; made from service master)*

    ag2001_0136_01_opt.jpg
    *(Optimized CONTENTdm upload derivative; made from master)*

    ag2001_0136_01_sm_opt.jpg
    *(Optimized CONTENTdm upload derivative; made from service master)*

    ag2001_0136_opt.pdf
    *(Optimized CONTENTdm upload derivative .pdf comprised of derivative .jpg files that are merged into a single file; .jpg files made from master)*

* For large and complicated accessions, please check the project files and/or DAM for a .txt file with specialized file-naming or cataloging instructions. For any accession that already has items digitized, it is mandatory to review the file-names and metadata records for existing items, to maintain consistency. Specialized cataloging instructions include, but are not limited to:
2.4 Image Digitization Workflow


Open the raw scan file.

(1) Make a full-resolution service master if optimizations such as color or exposure correction are required.
(2) Derive an optimized (_opt) .jpg file from the service master or archival .tif file.
(3) Save all master scan and service master files in MediaBank in the folder named with the accession number. Include three fields of metadata: identifier (call number); relation (part of); and rights (use generic permissions statement on file for each library).
(4) Save all upload derivative files in the CONTENTdm folder in MediaBank. Place files in the upload derivatives folder for each collection (_UploadDerivatives).

Compound Objects and .pdf Files

- Decisions are made on a case-by-case basis regarding how items that are components of multi-part resources will be displayed in CONTENTdm.
  - The constituent parts of a resource (e.g., the prints that comprise a portfolio) often are displayed as individual items.
  - When it is desirable to present the constituent parts of a resource (e.g., the covers and pages of a photograph album) as a set of related images, the upload derivatives (i.e., .jpg files) can be merged into a compound object. Because of their poor display, compound objects should be used rarely. It is preferable to present the items as .pdfs or as individual items within CONTENTdm, linked through controlled terms in metadata fields, including Part of, Series, Related Resources, etc.
When it is desirable to display the constituent parts of a resource (e.g., a multi-page document or pamphlet) as a single item, one or more upload derivatives can be saved as a .pdf file.

- When creating a .pdf file, follow the instructions provided in the document *General Instructions for Creating a PDF*. The document is located in \DigitalCollections\Documentation\Instructions_for_creating_a_PDF.docx on the project server.
- It is crucial for the pagination of a .pdf to precisely mirror that of the original resource.
- When a multi-part resource such as a book, album, portfolio, document, or report is digitized, always create a high-resolution archival .pdf file from the master .tif, service master .tif, or upload derivative .jpg files. Discuss the best option with the digitization coordinator.
- Create a low-resolution derivative of the archival .pdf file for upload to CONTENTdm. Ensure that the upload derivative is compressed to 20 MB or less, as larger .pdf files are not displayed inline in the CONTENTdm Item Viewer (i.e., larger files must be opened outside of CONTENTdm).
- If the file cannot be compressed below 20 MB, it needs to embedded in an .html page which is uploaded into CONTENTdm. Discuss this situation with the digital collections librarian.
- If a resource is slated for alternate distribution (e.g., upload to the Internet Archive), it may be necessary to create a third, medium-resolution .pdf if the low-resolution upload derivative is blurry.
- Place the high-resolution .pdf in the archive folder for the appropriate collection.
- Place the low-resolution .pdf in the CONTENTdm upload derivatives folder for the appropriate collection.
- Place any medium-resolution .pdf (e.g., Internet Archive) files in the appropriate archive folder.
- A Flipping Book feature in CONTENTdm is available, but it appears to compress and pixelate the images. It is not recommended for use at this point.
Chapter 3: Creating Metadata

Once resources have been digitized, metadata for the digital objects is created. Metadata initially is entered into a Google Sheet (spreadsheet).

Each digital collection has a basic metadata template that is used to create a spreadsheet for each digitization project that will be uploaded into the collection.

Any necessary changes to metadata fields are made in the project's spreadsheet.

Metadata templates and project spreadsheets are stored on the nCDS Google Drive.

3.1 Naming Metadata Files

3.1.1 Metadata Templates

The file-naming scheme for metadata templates is xxx_template, where xxx is the applicable three-letter digital collection designator.

Example:

- The three-character designator for the Robert Yarnall Richie Photograph Collection is ryr. The name of the metadata template for the collection is ryr_template.

3.1.2 Project Spreadsheets

Begin a project spreadsheet file name with the applicable three-letter digital collection designator.
When all items digitized for a project belong to a single accession, the preferred spreadsheet naming scheme is xxx_call_number, where xxx is the three-letter digital collection designator. For the call number segment, use lowercase letters and replace periods and spaces with an underscore.

**Example:**
- The call number for *Photographs from Mexico [graphic]* is Ag2000.1367. The accession includes 7 items.
- Digitized images of this accession will be uploaded into the Mexico: Photographs, Manuscripts, and Imprints collection (designator = mex).
- The spreadsheet file name is mex_ag2000_1367.

*Optional:* Add identifying information (e.g., the range of item numbers included in the spreadsheet) to the file name.

**Example:**
- The call number for *Robert Yarnall Richie photograph collection [graphic]* is Ag1982.0234. The accession includes approximately 10,000 photographic prints, as well as 45 boxes and 9 file cabinets of other resources.
- For the sake of convenience, each Richie spreadsheet typically contains metadata for approximately 20 items. As this practice results in the creation of numerous Richie spreadsheets, it is necessary to build information that identifies the range of item numbers into these file names.
- A group of digitized images numbered 0160 to 0166 will be uploaded into the Robert Yarnall Richie Photograph Collection (designator = ryr).
- File names for the master images range from ag1982_0234_0160_01_gimbel.tif to ag1982_0234_0166_05_chandler.tif.
- The file name ryr_ag1982_0234_0160-0166 indicates that the spreadsheet contains metadata for images numbered 0160 to 0166.

If the items digitized for a project belong to multiple accessions and therefore have different call numbers, an alternative naming scheme can be devised to identify the spreadsheet content.
3.2 Metadata Creation Workflow

CUL digital collection metadata passes through three stages: (1) creation; (2) proofreading; and (3) upload to CONTENTdm. The following procedure is used to help track the assignment and progress of spreadsheets as they move through the various stages:

- While creating metadata, catalogers append their initials to the spreadsheet file name, directly before the file extension. Initials are lowercased and enclosed in parentheses.

  **Example:** eaa_vault_folio_2_ta71_a4_1883_2 (mh)

- When metadata creation is finished, catalogers add the term *DONE*, in all caps, after their initials, preceded by one space and followed by the closing parenthesis. The cataloger then notifies the digital collections developer by e-mail that this stage has been completed.

  **Example:** eaa_vault_folio_2_ta71_a4_1883_2_(mh DONE)

- While proofreading, proofreaders add their initials after the term *DONE*, preceded by one space and followed by the closing parenthesis.

  **Example:** eaa_vault_folio_2_ta71_a4_1883_2_(mh DONE kh)

- When proofreading is finished, proofreaders add the term *DONE*, in all caps, after their initials, preceded by one space and followed by the closing parenthesis. The proofreader then notifies the digital collections developer by e-mail that this stage has been completed.

  **Example:** eaa_vault_folio_2_ta71_a4_1883_2_(mh DONE kh DONE)
After the digital objects and associated metadata are uploaded to CONTENTdm, the uploader is responsible for finishing each of the following steps.

- 1) Export metadata and delete oldest copy of the metadata export in the projects folder.
- 2) Upload CONTENTdm derivatives into MediaBank and make sure the upload is successful.
- 3) Delete CONTENTdm derivatives and related folder(s) from the digitization projects folder.
- 4) Delete the metadata spreadsheet from Google Drive. Note: Deleted spreadsheets are stored indefinitely in the Trash folder, which is never emptied.
- 5) Fill in last column in green with date in the nCDS projects spreadsheet.
- 6) Delete files from workstation.

If you do not delete a spreadsheet or folder for a specific reason, please append that spreadsheet or folder name, e.g. xxxxx_NEEDS_DAM, xxxxxx_CB_NEEDS_FOR_REFERENCE, etc.

Send email to the digital collections developer, digital production librarian, and digitization coordinator that the digitization project has been uploaded and related files can be cleared from all workstations. Use the phrase [spreadsheet file name] has been uploaded in the subject line.

Be sure to identify that the project has been uploaded, including the name of the spreadsheet.

Provide a link to the items by using the call number and month tags.

Confirm that the previous steps have been completed by writing “all 6 steps related to upload have been completed”.

Include a short description for the monthly report.

Copy the MARC cataloger if it is a new accession and indicate it needs a link to the digitized items from the MARC record.
Chapter 4: CUL Digital Collections Cataloging

4.1 General Guidelines for Cataloging

Most CUL digital collections follow the cataloging guidelines listed below. Not all collections contain all metadata fields, and some customizations exist. Some legacy and earlier collections contain separate metadata profiles in their project files, located on the project server.

Mandatory CONTENTdm metadata fields must be used.

Non-mandatory fields can be used in total or in part.

Field names can be changed in consultation with curators and nCDS librarians.

New fields can be added in consultation with curators and nCDS librarians.

The order of the fields can be changed.

nCDS staff will work with collection holders to develop a unique file-naming scheme and digital archive for each collection.

It is recommended that the metadata be viewed as exported standard Dublin Core XML (or any other export format) early in a project. Due to the vagaries of metadata exporting, multiple custom fields often are mapped to a single Dublin Core element. When CONTENTdm metadata is exported, for example, the content of all fields mapped to a specific Dublin Core element is placed in a single field, potentially making the metadata unintelligible. Punctuation or labels such as Digitization process: may need to be added for clarity.

It is extremely important to maintain consistency throughout the collection. Consistency is essential to achieving the best possible search results and metadata display. Please contact nCDS for help in developing consistent style and content conventions.
Dublin Core does not provide the strict style framework prescribed by RDA. Style guidelines are always under development. Please contact nCDS to share your suggestions.

### 4.2 Style Guidelines for Cataloging

These style guidelines are applicable to the creation of CUL Digital Collections metadata records. The general punctuation conventions followed by nCDS are those recommended in *The Chicago Manual of Style Online* (CMOS). The nCDS citation style is an adaptation of the "notes" format of the CMOS "notes and bibliography" documentation system. Source: The University of Chicago, *The Chicago Manual of Style Online*, 16th ed. (Chicago: University of Chicago Press, 2010), [http://www.chicagomanualofstyle.org/16/contents.html](http://www.chicagomanualofstyle.org/16/contents.html).

#### 4.2.1 General Style Guidelines

*Do not* use special characters, including diacritics, as CONTENTdm cannot display them correctly and/or they get transformed during metadata export. Characters on the top row of the QUERTY keyboard (e.g., @, #, &), however, *may* be used.

*Do not* use quotation marks, as CONTENTdm turns them into a double set of quotation marks. Use two apostrophes in place of a quotation mark.

*Do not* begin a metadata field with an apostrophe or a "quotation mark" (two apostrophes), unless it is a crucial part of the title, due to formatting issues in CONTENTdm, which sometimes omit one or more of the leading apostrophes. Check the item once it is online to see how it displays. Avoid using quotation marks in general whenever possible.

*Do not* place any mark of punctuation directly after a URL, as doing so causes CONTENTdm to break the hyperlink. Separate a URL from any text that follows with two blank spaces (  ).

*Do not* use italics.
*Do not* use paragraph breaks or tabs.

Use a single hyphen in place of a dash. Add one space before and after the hyphen ( - ).

Unless their use is specified in the style guidelines, avoid using semicolons whenever possible.

If the accuracy of all or part of the information entered in a field that is not based on a controlled vocabulary is uncertain, follow the last word with one space and a square bracket-enclosed question mark ( [?]). An exception to this guideline is made for titles that are enclosed in square brackets (i.e., cataloger-created titles). In the case of a bracketed title, place a space, question mark between the last word of the title and the closing bracket ( ?]).

**Examples:**

- Dallas, Dallas County, Texas [?]
- [P. L. Montague standing in front of house ?]

Be on the lookout for British and historical spellings and punctuation. *These are not errors.* Rather, they are an alternative way of expressing the English language. They should be transcribed as written and do not require the use of the term *sic*. Common examples include:

- Colour (*for color*)
- Practise (*for practice*)
- Canon or cañon (*for canyon*)

Use one space, not two, between sentences and after a colon.

Use one space between the initials in a name *unless* the initials are used alone. In the Creator, Contributor(s), Notes, and Keywords fields, exceptions to this guideline are made for LC Name Authority headings (e.g., corporate name headings such as *E. & H.T. Anthony*) and for text that is transcribed directly from a resource.

**Examples:**

- T. C. Roche
Use the Oxford (serial or series) comma (i.e., "When a conjunction joins the last two elements in a series of three or more [items], a comma . . . should appear before the conjunction."). An exception to this guideline is made for titles and text that are transcribed directly from a resource (see guidelines in 5.1 and 5.12). Source: CMOS, Chapter 6, http://www.chicagomanualofstyle.org/16/ch06/ch06_sec018.html.

**Example:** Europe, Asia, and Australia.

Place periods and commas *inside* closing quotation marks. Place semicolons and colons *outside* closing quotation marks. Place question marks and exclamation points *outside* closing quotation marks *unless* they are part of the quoted material.

Use a mark of omission (i.e., three consecutive periods) in place of ellipsis points (i.e., three spaced periods) to indicate that a word, phrase, paragraph, etc., has been omitted from text. Add one space before and after the periods ( ... ). Use only three periods (the three-dot method), regardless of where the omission occurs (e.g., in the middle of a sentence or between sentences).

**Example:** The choice ... typically is made by the publisher.

Format titles in *title case* (headline style). An exception to this guideline is made for titles that are transcribed directly from a resource (see guidelines in 5.1).

- Capitalize the first and last words of the title and all nouns, pronouns, adjectives, verbs, adverbs, and subordinating conjunctions (e.g., as, because, if, that).
- Unless they are the first or last word of the title, all articles (i.e., a, an, the), coordinating conjunctions (e.g., and, but, or, for, nor), and prepositions (e.g., about, before, for, on, to), regardless of length, are lowercased.
For more information about parts of speech, see CMOS, Chapter 5, [http://www.chicagomanualofstyle.org/16/ch05/ch05_toc.html](http://www.chicagomanualofstyle.org/16/ch05/ch05_toc.html).

Separate a title and subtitle with a colon, space (: ). Capitalize the first word of the subtitle.

When books are mentioned in text, capitalize an initial the in the title.

When periodicals and American newspapers are mentioned in text, lowercase an initial the in the name of the publication, unless it is the first word in the sentence. An exception to this guideline is made for The Dallas Morning News.

**Example:** The column is published daily in the New York Times. *(The official name is The New York Times.)*

For more information about the use of punctuation, see CMOS, Chapter 6, [http://www.chicagomanualofstyle.org/16/ch06/ch06_toc.html](http://www.chicagomanualofstyle.org/16/ch06/ch06_toc.html).

### 4.2.2 Style Guidelines for Source Citations

"Ethics, copyright laws, and courtesy to readers require authors to identify the sources of direct quotations or paraphrases and of any facts or opinions not generally known or easily checked . . . the primary criterion of any source citation is sufficient information either to lead readers directly to the sources consulted or, for materials that may not be readily available, to positively identify the sources used, whether these are published or unpublished, in printed or electronic form." Source: CMOS, Chapter 14, [http://www.chicagomanualofstyle.org/16/ch14/ch14_sec001.html](http://www.chicagomanualofstyle.org/16/ch14/ch14_sec001.html).

We use a truncated citation style in the Notes field (see below) to allow users to quickly find sources and for catalogers to know where information was obtained, e.g. Title, Creator, Date, Place, etc.

When used in the Description field, place source citations after the body of text in the Description field (i.e., not immediately after the information to which it applies). *Do not* place citations in the Related Resources field.
Precede one citation with the term *Source:* and two or more citations with the term *Sources:*

Separate the elements of a citation with a comma, space (, ).

End source citations with a period, *unless* the last element is a URL (see guidelines in 4.2.3, "About URLs").

When citing two or more sources, *unless* the last element of a citation is a URL (see guidelines in 4.2.3, "About URLs").

Arrange two or more citations in order of importance (i.e., most important first, etc.).

Do not enclose the titles of articles, chapters, and other short works in quotation marks. Capitalize the title of a Website, but do not enclose it in quotation marks.

Use the form of an author's name that appears in the source. Give names in normal order (i.e., First Name Last Name).

**Examples:**

- Eric Steinfeldt
- G. William Jones
- George Albert Converse

Format titles in *title case* (headline style).

In *citations,* include an initial *the* in the title of a book.

In *citations,* omit an initial *the* in the name of a newspaper or periodical.


Use Arabic numerals for the volume number of a journal. Precede the number with the term *Volume.*

**Example:** Volume 38
Precede the issue number of a journal with the term *Number*.

**Example:** Number 3

Provide pertinent page numbers when citing quoted or paraphrased material. Give the beginning and ending page numbers of journal and magazine articles. In other cases, page numbers may be included at the discretion of the cataloger.

Precede page numbers with the term *page* or *pages*. When giving a range of page numbers, separate the numbers with a hyphen.

**Example:** pages 5-12

Format the date of a newspaper or magazine article as: Month dd, yyyy. Spell out (i.e., do not abbreviate) the month name.

**Example:** March 2, 2013

Omit any citation element that is not applicable to the source or for which information is not available.

### 4.2.3 Format and Content of Source Citations

#### Printed Book

- **One author:** Author (First Name Last Name), Book Title, Place of Publication, Publisher, Date, Page.
- **Two authors:** Author1 and Author2, Book Title, Place of Publication, Publisher, Date, Page.
- **Three or more authors:** Author1 et al, Book Title, Place of Publication, Publisher, Date, Page.

#### Book Published Online (see "About URLs" below)

- **One author:** Author (First Name Last Name), Book Title, Place of Publication, Publisher, Date, Page, URL
- **Multiple authors:** Follow format for printed books.
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**Printed Journal Article**

- **One author:** Author (First Name Last Name), Article Title, Journal Title, Volume Number, Issue Number, Date, Page.
- **Multiple authors:** Follow format for printed books.

**Journal Article Published Online**

- **One author:** Author (First Name Last Name), Article Title, Journal Title, Volume Number, Issue Number, Date, Page, URL
- **Multiple authors:** Follow format for printed books.

**Printed Magazine or Newspaper Article**

- **One author:** Author (First Name Last Name), Article Title, Publication Title, Date, Page.
- **Multiple authors:** Follow format for printed books.

**Magazine or Newspaper Article Published Online** (see "About URLs" below)

- **One author:** Author (First Name Last Name), Article Title, Publication Title, Date, Page, URL
- **Multiple authors:** Follow format for printed books.

**Website Content** (see "About URLs" below)

- **One author:** Author (First Name Last Name), Article Title, Website Name, Date of Article (do not include date viewed), URL
- **Multiple authors:** Follow format for printed books.

**Short Citations for Notes**

- As the first Note in the Notes field, put a short citation for information obtained in cataloging. Describe the field, briefly describe how the information was obtained, and put a URL when possible. As mentioned below, do not add a period after a URL, but use two blank spaces.
Examples:
- Date obtained from stampbox.
- Date obtained from [http://www.loc.gov/pictures/item/99615950/](http://www.loc.gov/pictures/item/99615950/)

About URLs

- *Do not* place any mark of punctuation directly after a URL, as doing so causes CONTENTdm to break the hyperlink.
- Use two spaces (  ) between citations when the first one ends in a URL.
- Do not include a URL if the source is a subscriber database.
- Do not include a URL if it is extremely long.
Chapter 5: Descriptive Metadata

Note: Always refer to and follow the guidelines in 4.2, "Style Guidelines for Cataloging," when creating CUL Digital Collections metadata records.

5.1 Title

**Dublin Core Element:** Title  
**Mandatory:** Yes  
**Public:** Yes  
**Searchable:** Yes  
**MARC Field:** 245

**Description:**

Name given to the resource by the creator or publisher or cataloging agency. Titles may be created by the cataloger when necessary.

**Style:**

Always use the title given in a MARC record if it is available; however, transcribe it in title case. Except for capitalization, make sure the title matches the MARC record precisely, even if something different is written on the item that may be transcribed as title. The preferred source of information for published resources is either the title page or the cover. The preferred source of information for graphic materials is the resource itself, including captions, permanently-affixed labels, handwritten notes, and containers such as negative sleeves. Give preference to a source in which information is formally presented.
If formally-presented information is not available, give preference to a note written in period script as the source of an original title. If the content of such a note is known to be incorrect, use the information as is and enter an explanatory note in the Notes field. In addition, formulate an alternative title based on accurate information (see guidelines in 5.2).

A note written in non-period script may be used as the basis for an original title if the information it contains is known to be accurate. If the content of such a note cannot be confirmed, use the information as is or as the basis for a cataloger-created title and enclose it in square brackets (see guidelines below in "When Creating a Title"). If the content of such a note is known to be incorrect, formulate a title based on accurate information and enclose it in square brackets (see guidelines below in "When Creating a Title").

Transcribe the title of the original resource exactly as to wording, order, spelling, punctuation, and capitalization, except when words are in all caps. If the entire title is written in all caps, transcribe using title case. In the case of an isolated word(s) in all caps, transcribe using the style of the remainder of the title. Acronyms and initialisms remain in all caps. End the title with a period if a period is used in the source.

On a case by case basis, you may need to add punctuation, such as commas or periods, when including disparate pieces of information or to set off locations, e.g. city state. Often, such punctuation is implied on the item by placing the information on separate lines or in disparate sections. Examples: El Mundo Ilustrado Mexico, 7 de Abril de 1907 becomes El Mundo Ilustrado, Mexico, 7 de Abril de 1907 (comma added before the word Mexico), or Weighing Cotton Leonard Tex. Becomes Weighing Cotton, Leonard, Tex.

When transcribing a misspelled word from a resource, add the term [sic] directly after the word to indicate that the misspelling is not a cataloging error.

If the title is extremely long, extract a shortened version. Transcribe the full title in the Notes field, preceded by the phrase The full title for the item is ...

Do not include negative numbers in the title. Include dates and places if you believe they are intended to be part of the title; otherwise, enter such information in its assigned field. When these items are intended to be part of the title, check with the special collections librarian to see if they should be preceded with a comma, space (, ).
If an item does not have an original title, formulate a title that describes the resource and enclose it in square brackets.

Unless absolutely mandatory, do not begin a title with quotation marks or apostrophes. These often do not display at all or correctly in CONTENTdm. If you must use quotation marks, use double apostrophes due to the technical display issue of quotation marks in CONTENTdm and check the item when it is uploaded to verify they display. If only the closing apostrophes display, you will need to delete both sets.

**When Creating a Title**

Use title case. *Note: AACR2 style may have been followed in earlier records. Leave titles in existing records as is.*

Less is more! Keep titles short and concise when you create them.

Example: [Woman with Pencil and Notebook] NOT [Woman with Pencil and Booklet, Facing Front]

Use commas instead of prepositions

Example: [Concession Tent and Employees, State Fair of Texas] NOT [Concession Tent at the State Fair of Texas]

Avoid beginning a title with an article (i.e., a, an, the) whenever possible.

Do not end a title with a period, when you create the title.

Spell out the word *and* rather than using an ampersand when creating a title. An exception is allowed for railroad titles created by a cataloger where the ampersand may be preferred, i.e. in the name of a railway line.

When a formulated title includes a corporate name that contains a word such as *Company, Corporation,* or *Incorporated,* use the standard abbreviation of the term (e.g., Co., Corp., Inc.) in the title. Enter the LC authorized heading, if available, in the Authorized Subject Terms field. If an authorized name is not available,
suggest a term in the Local Subject Authorities or Local Name Authorities spreadsheets by providing the fullest form of the corporate name available. For example, use *Bethlehem Steel Co.* in the title and enter *Bethlehem Steel Company* to be approved in the Local Name Authorities spreadsheet field. In addition, enter notable variations of the corporate name in the Keywords field. For example, for a title that contains *Humble Oil and Refining Co.*, enter *Humble Oil & Refining Company (Incorporated in Tex.); Exxon Mobil Corporation* in the Authorized Subject Terms field.

Remember that items frequently will be viewed in alphabetical order. Consider the effect that the formulation of the title will have on the presentation of search results. Begin the title with a descriptive term that is likely to be used as a search term (e.g., Brooklyn Bridge: View from Across the River, rather than View of Brooklyn Bridge from Across the River).

**Examples:**

- Symphony No. 3, A Major, Opus 56
- Arapahoe County Map
- [Cowboys in Front of Small House with Thatch Roof on Ranch]
- El Presidente de la Republica a su Ilegada al campo de la revisita.
- Crowd Watching Flood, Dallas, Texas
- Gezicht op het aanlegemplacement Cheribon
- [Railroad Bridge and Tracks]
- [Male Students, Metropolitan Business College, Dallas, Texas]

See "DeGolyer Library Railroad Collection Titles" (below) for additional guidelines specific to creating titles for DeGolyer Library railroad collection resources.

**Optional:** For untitled pages of multi-part resources (e.g., books, albums, multi-page documents), create a title using the following format: Title of Resource, [page xx] (substitute a term such as *cover, inside cover, flyleaf*, etc., for page information when appropriate). If the title ends in a period, omit the comma. Do not enclose this title in square brackets. If a page has an original title (e.g., a titled book illustration), enter the
original title in the Title field and enter the formulated title in the Alternative Title field, even if none of the other pages have an original title.

**Examples:**

- American Indians: First Families of the Southwest, [cover]
- American Indians: First Families of the Southwest, [pages 20 and 21]
- The War Between the United States and Mexico Illustrated. [front cover]
- [La Decena Tragica, front cover]

- *The resource is page 25 of the book Taos Pueblo. The original title of page 25 is "III. A Man of Taos."
  
  **Title field:** III. A Man of Taos
  
  **Alternative Title field:** Taos Pueblo, [page 25]

**DeGolyer Library Railroad Collection Titles**

**Railroad photographs**

If an item does not have an original title, create a title that includes the railway line, builder, car type, number, and/or route, if known. The spelled-out abbreviation (i.e., not the acronym or initialism) for the railway line may be used.

When both the railway line and the builder are known, use the following sequence: railroad, locomotive number, builder.

The following styles are acceptable: Locomotive No. xx; Locomotive xx; No. xx.

Optional: Create an Alternative Title using this style when the original title does not capture this information adequately.
Information on the sleeve or index card of an item should be re-formatted to include this information.

**Examples:**

- [Atlantic Coast, Locomotive 2003]
- [Chicago, Burlington & Quincy, "Missouri" Locomotive and Tender]
- [Northwestern Pacific, NWP 06, Redwood Empire Route]
- [Ferrocarril del Sureste, Pullman Sleeping Car 7813-12, "Tacotalpa"]
- [Ferrocarril Mexicano, First Class Car 40]
- [Ferrocarril Mexicano, Dining Car, "Apizaco"]
- [St. Louis & San Francisco, Frisco, Motor Car 2130]
- [International & Great Northern, Locomotive 122 with Tender]
- [Grant Locomotive Works, No. 239]
- [New York Elevated Railroad, No. 54, Rhode Island Locomotive Works]

**Depot and station photographs**

If an item does not have an original title, create a title that includes the railway line and geographical location, if known. The spelled-out abbreviation (i.e., not the acronym or initialism) for the railway line may be used. Do not abbreviate the geographical location.

Create an Alternative Title (see guidelines in 5.2) using this style when the original title does not capture this information adequately.

**Examples:**

- [Southern Railway Depot, Tuscumbia, Alabama]
- [Texas & Pacific Railway, South Mansfield Depot, Mansfield, Louisiana]
- [Texas & Pacific Railway Depot, Pleasant Hill, Louisiana]
5.2 Alternative Title

Dublin Core Element: Title
Dublin Core Qualifier: Alternative Title
Mandatory: No
Public: Yes
Searchable: Yes
MARC Field: 246

Description:

Alternative name given to the resource by the creator or publisher or cataloging agency, including translated titles. Alternative titles may be created by the cataloger.

Style:

Use same style as Title field.

Enclose cataloger-created Alternative Titles in square brackets.

Put translated titles in brackets. Earlier records that do use brackets do not need to be changed.

Examples:
### 5.3 Creator

**Dublin Core Element:** Creator  
**Mandatory:** Yes  
**Public:** Yes  
**Searchable:** Yes  
**MARC Field:** 1XX, 7XX

**Description:**

Person or entity primarily responsible for creating the intellectual content of the resource. Examples of creators include authors of written documents, artists, photographers, etc.

As of late 2015, we began switching to an authorized name controlled vocabulary. Creator and Contributor names will go into the same controlled vocabulary, but will be separated by library (one vocabulary for the DeGolyer Library and another for the Hamon Arts Library).
We will no longer be adding roles to creators and contributors unless it is included in the authorized name from the Library of Congress or is needed to clarify similar local names. We will not be putting [attributed] in the Creator field; this information will be added in a Note (see below).

Use these sources for authorized names in order of preference.

- Library of Congress Name Authorities (LCNAF), also available under http://authorities.loc.gov/
- VIAF: The Virtual International Authority File
- Handbook of Texas
- Getty Thesaurus Union List of Artist Names Online

Photography studios

We will use the authorized name of a person in the creator field instead of the photography studio when the studio is named after a singular person and we know their authorized name.

In instances where a photography studio is named after multiple people and we know their authorized name, place the studio name in the Creator field and include the individual names in the Authorized Subject Terms field.

Style:

As of late 2015, the creation of a shared controlled vocabulary for the Creator and Contributor fields was underway.

For personal names, use the LOC Name Authority heading, if available. Do not add birth and death dates to the LOC authorized name – copy it precisely.

Use Unknown if the Creator is unknown. Do not leave the field blank.
If an LOC name authority is not available, follow LOC style to create a heading, providing the fullest form available (e.g., last name, first name, middle name/initial, birth and death dates). Submit the original spelling, i.e. from the item, if it is available and your proposed authorized version of the name in the Local Name Authorities spreadsheet for approval. Add any important notes or URLs in the Notes column.

For corporate names, use the LOC authorized name heading, if available. If not, follow LOC style to create a heading. Submit the original spelling, i.e. from the item, if it is available and your proposed authorized version of the name in the Local Name Authorities spreadsheet for approval. Add any important notes or URLs in the Notes column.

Remember to transcribe alternative spellings, e.g. for photography studios, precisely as they are in the Notes field.

When necessary, you may use alternative spellings if they are commonplace or acronyms, e.g. for railroads, in the Keywords field.

If a creator's relationship to the resource is attributed but not verified, provide this information in the Notes field, i.e. This photograph is attributed to Matthew Brady.

Separate multiple entries with a semicolon, space (; ).

Do not add punctuation to close this field. Use punctuation that is part of an authorized term or part of the name, e.g. initials.

**Examples:**

- Paxson, Charles
- Roche, Thomas C., 1826-1895
- Barnard, George N., 1819-1902
- Biscoe, T. Dwight (1840-1930); Biscoe, Walter S. (1853-1953)
- Unknown
5.4 Contributor(s)

**Dublin Core Element:** Contributor  
**Mandatory:** No  
**Public:** Yes  
**Searchable:** Yes  
**MARC Field:** 7XX

**Description:**

Person or entity whose contribution to the creation of the resource is significant but secondary to that of any person or entity specified in the Creator field (e.g., editor, transcriber, annotator).

**Style:**

*As of late 2015, the creation of a shared controlled vocabulary for the Creator and Contributor fields was underway.*

Use the style for cataloging the Creator field.

Leave this field blank if there are no known contributors.

Document the contributor’s role, if deemed important, in the Notes field. The MARC Code List for Relators, [http://loc.gov/marc/relators/relaterm.html](http://loc.gov/marc/relators/relaterm.html), is a recommended (but not required) source of terms. A list of relationship designators specific to contributors is available in RDA, Appendix I, [http://access.rdatoolkit.org/](http://access.rdatoolkit.org/).

Separate multiple entries with a semicolon, space (; ).

Do not use closing punctuation in this field, unless it is part of an authorized term.
Examples:

- Fraser, Russell A.
- Weatherington Brothers
- The Texas Nursery Company

5.5 Date

**Dublin Core Element:** Date  
**Dublin Core Qualifier:** Created  
**Mandatory:** Yes  
**Public:** Yes  
**Searchable:** Yes  
**MARC Field:** 264

**Description:**

Creation date for the *original* resource from which the digital object was derived or created.

**Style:**

Always try to find a date or date range for each item, particularly if it is 1923-present. It is particularly important to find a date or date range for railroad photographs. Contact the collection curator with any questions regarding the date of a resource.

Use the fullest date available, spelling out the day and month if it is available.
Do not put spaces between hyphens in a date range.
Express decades as numerals. End decade date ranges with the letter s.
Use the abbreviation ca. for the term circa.
Always precede a decade or date range with ca.
If no date is known, use the term no date. Note: The term n.d. may have been used in earlier records. Leave these records as is.
If two dates are applicable, e.g. date photograph or item was created vs. date of publication, use the former. See Notes on Documenting Dates below.
Do not use closing punctuation in this field.

Examples:
- June 29, 1919
- October 1885
- 1906
- ca. 1890
- ca. 1980-1985
- ca. 1920s
- ca. 1918-1920s
- ca. 1860s-1870s
- no date

5.5.1 Notes on Documenting Dates
For dates based on a postmark and for which no other date information is available, use the postmark in the Date field and add the following note in the Notes field: Date refers to postmark; photograph may have been taken earlier.
For items with a postmark and other date information that refers to the date of the photograph (i.e. inscription on the negative, date given in accompanying text, etc.), use the earlier date in the Date field.

For items with a postmark and no other date information, but for which the date of the photograph may be found through research, use the date found through research in the Date field. Add a note in the beginning of the Note field as to how the date was determined, e.g. Date obtained from (i.e. history of town, account of event, etc.) [hyperlink, two spaces, no period].

For items with a postage stamp and no other information, use postage stamp as a reference point and check the date range it was in circulation. (i.e. 1908-1910) Use this range as a circa date and add a note in the beginning of the Note field that states: Date obtained from stamp.

For items with a wide date-range from a stamp box (i.e. 1910s-1930s) examine the content of the photograph to narrow the range through research (i.e. signage, clothing style, vehicles, etc.) Add a note in the Notes field only if necessary for clarification.

5.6 Date (ISO)

**Dublin Core Element:** Date  
**Dublin Core Qualifier:** Created  
**Mandatory:** Yes  
**Public:** Yes  
**Searchable:** Yes  
**MARC Field:** 264
Description:
This is a new field (late 2015) that replicates the Date, as cataloged above, in ISO 8601 format to correspond with international standards for cataloging dates and facilitate precise date searching.

Style:

*Shared controlled vocabulary.*

Use these guidelines to formulate the date using the ISO 8601 standard.

- **ISO 8601**
- **ISO 8601 Date Range**
- **ISO 8601 Uncertain/Approximate Dates**

Do not use closing punctuation in this field.

Do not spell out dates in the Date (ISO) field.

Use "~" in place of "ca." Place the symbol after date.

Use "?" to designate an unknown date. Place the symbol after the date.

Use "/" to separate dates in a date range.

Use "x" to replace questionable date that occurred once during a time period (1920s, etc.)

YYYY

YYYY-MM

YYYY-MM-DD
CUL Digital Collections: Framework for Building a Collection, Version 4

YYYY-MM-DD/YYYY-MM-DD [closed date range]
/YYYY [open date range, no beginning date known]
YYYY/ [open date range, no ending date known]

Examples:

- 1876-09-19
- 2011-06
- 1900
- 2012~
- 1999?
- 1809-09-01/1810-10-01
- 192x
- 192x/193x
- 186x/1885~ (for ca. 1860s-1885)
- 1885~/1890~ (for ca. 1885-1890)
- 1918-06~ (for ca. June 1918)
- 1925~/1929~ (for ca. 1925-1929)
- {1918-09-06, 1918-09-18} (for September 6 or September 18, 1918)

Notes about using postmarks, stamps, and other information to obtain a date.

For dates based on a postmark and for which no other date information is available, use the postmark in the Date field and add the following note in the Notes field: Date refers to postmark; photograph may have been taken earlier.

For items with a postmark and other date information that refers to the date of the photograph (i.e. inscription on the negative, date given in accompanying text, etc.), use the earlier date in the Date field.

For items with a postmark and no other date information, but for which the date of the photograph may be found through research, use the date found through research in the Date field. Add a note in the beginning of
the Note field as to how the date was determined, e.g. Date obtained from (i.e. history of town, account of event, etc.) [hyperlink, two spaces, no period].

For items with a postage stamp and no other information, use postage stamp as a reference point and check the date range it was in circulation. (i.e. 1908-1910) Use this range as a circa date and add a note in the beginning of the Note field that states: Date obtained from stamp.

For items with a wide date-range from a stamp box (i.e. 1910s-1930s) examine the content of the photograph to narrow the range through research (i.e. signage, clothing style, vehicles, etc.) Add a note in the Notes field only if necessary for clarification.

5.7  Decade

**Dublin Core Element:** Date  
**Dublin Core Qualifier:** Created  
**Mandatory:** Yes  
**Public:** Yes  
**Searchable:** Yes  
**MARC Field:** 264
Description:
The decade during which the original resource was created.

Style:

*Shared controlled vocabulary.*

Use the format yy00-yy09. Separate the years with a hyphen (no spaces before/after the hyphen).

Separate sets of decades with a semicolon, space (; ).

Leave this field empty if no date is known.

Leave this field empty if the date range includes more than two decades.

Do not use closing punctuation in this field.

**Examples:**

- 1900-1909
- 1900-1909; 1910-1919

5.8 Part Of

**Dublin Core Element:** Relation
**Dublin Core Qualifier:** IsPartOf
**Mandatory:** Yes, if applicable  
**Public:** Yes  
**Searchable:** Yes  
**MARC Field:** 773

**Description:**
The title of the accession to which the original resource belongs.

**Style:**

*Shared controlled vocabulary for each major library or special collections unit; e.g. DeGolyer Library; Bywaters Special Collections.*

Use the title statement that appears in the SMU Library Catalog bibliographic record for the accession. Record the title proper exactly as to wording, order, spelling, and capitalization, except for the following two items:

- Omit ISBD-specified spaces such as those that precede a colon.
- Omit any general material designation that appears in the title statement (e.g., [graphic]).

If the title is extremely long, shorten it and use a mark of omission ( ... ) to indicate that part of the title proper has been omitted.

Use this field even for items such as books where the title of the digital resource and the title of the accession are the same, so there will be a controlled term for the resource.

Use the date in the MARC 245 |f field on a case by case basis.

When quotation marks are in the mark record, use single apostrophes, i.e. do not use quotation marks or double apostrophes.

Do not use closing punctuation in this field, unless it is part of the term in the MARC record.
If an authorized term has not previously been created, add it to the controlled vocabulary for the Part Of field in CONTENTdm.

**Examples:**

- George W. Cook Dallas/Texas image collection
- George Albert Converse papers and photographs, 1861-1897
- Alexander Gardner cartes de visite and portraits
- Collection of Carleton E. Watkins western stereoscopic views
- Destruction of New Laredo Mexico April 24, 1914
- All the western states and territories, from the Alleghanies to the Pacific, and from the Lakes to the Gulf, containing their history from the earliest times ...

### 5.9 Series

**Dublin Core Element:** Relation  
**Dublin Core Qualifier:** IsPartOf  
**Mandatory:** No  
**Public:** Yes  
**Searchable:** Yes  
**MARC Field:** 773
Description:

The series within a collection to which the resource belongs; a more granular description than the Part Of field.

Style:

*Shared controlled vocabulary.*

Transcribe the series title of the original resource *exactly* as to wording, order, spelling, and capitalization, except when words are in all caps. If the entire title is written in all caps, transcribe using title case. In the case of isolated word(s) in all caps, transcribe using the style of the remainder of the title. Acronyms remain in all caps, with no periods between letters.

Transcribe all punctuation as it appears in the original resource, except in the case of a colon. Doublecheck that the term works in CONTENTdm. If not, use a comma in place of a colon in a series title, as the use of colons sometimes results in the creation of terms that do not work in CONTENTdm.

Use series and sub-series titles from finding aids in this field.

Create series titles for discrete sub-units of an accession, e.g. albums, diaries, etc. These do not need to be bracketed.

When creating a series title, use title case. *Note:* AACR2 style may have been followed in earlier records. Leave series titles in existing records as is.

One item may belong to multiple series. Separate multiple entries with a semicolon, space (; ).

Do not use closing punctuation in this field, unless it is part of the series term.
If an authorized term has not previously been created, add it to the controlled vocabulary for the Series field in CONTENTdm.

**Examples:**

- Views of Gen'l Crook's expedition and the Black Hills
- Indians of the Colorado Valley.
- Scenery of the Yellowstone National Park
- Broad Panel Views, Yellowstone Park
- Album 3, Hardinge Bridge Construction, India
- Series 3: City views, 1870-1936
- Series 1: Postcards and Small Prints

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**5.10 Page Number**

**Dublin Core Element:** Source  
**Mandatory:** No  
**Public:** Yes  
**Searchable:** Yes  
**MARC Field:** 300  

**Description:**
Page number from book or album.

Do not create page numbers. Only use them if they are written or imprinted.

**Style:**

Precede the page number with the term *p*.

Pad page numbers with leading zeros, using only the number of zeros required to accommodate the total number of pages. For example, use 00-99 for a resource with fewer than 100.

Previous use of the field included page numbers based on the numbering in the file name. This practice is no longer in use.

Do not use closing punctuation in this field.

**Examples:**

- p. 002
- p. 159

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**5.11 Place**

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**Dublin Core Element:** Coverage  
**Mandatory:** No
Public: Yes
Searchable: Yes
MARC Field: 522

Description:

Geographic location depicted in the item. The Getty Thesaurus of Geographic Names Online is a recommended resource.

Style:

Spell out (i.e., do not abbreviate) all place names (e.g., the names of cities, states, countries).

Place field contains information on the place as it is named today.

Go from smaller to larger geographic areas (e.g., City, County, State/Region).

Include the country for locations outside the United States.

Separate areas with a comma, space (, ).

Leave blank if the place is unknown.

Put [?] at the end if the place cannot be confirmed. Include multiple places, when necessary.

Inclusion of a county is now mandatory. Follow the county name with the term County, capitalized and spelled out. For Louisiana, use the term Parish in place of County.
For cites that comprise multiple counties, and for which you do not know the exact county depicted, use the preferred county as listed in the Getty Thesaurus of Geographic Names.

If you cannot determine the exact, current place, you may use the period place as denoted on the object, i.e. Wyoming Territories; U.S. Mexico Border Region.

For Mexico City, use Mexico City (Mexico D.F.), Mexico

For foreign states that duplicate the name of a city or country, follow the Getty Thesaurus of Geographic Names style, e.g. City, City state, Country.

Records from many older items did not follow the Getty Thesaurus of Geographic Names. These items do not need to be changed.

The following cities North America--Mexican-American Border Region in the Authorized Subject Terms field and U.S. Mexico Border in the Keywords field: Naco; Douglas; Del Rio; Pharr; Tijuana; Matamoros; Brownsville; El Paso; Cuidad Juarez; Nuevo Laredo; Laredo; Piedras Negras; Eagle Pass; Ojinaga/Presidio; Reynosa/ Hidalgo (TX); Columbus, NM; Agua Prieta; Nogales; Mexicali; Tecate; Deming; Harlingen.

Do not use closing punctuation in this field.

**Examples:**

- Dallas, Dallas County, Texas
- Sherman, Grayson County, Texas
- Mexico [?]
- Maryland Heights, St. Louis County, Missouri
- Philadelphia, Philadelphia County, Pennsylvania
- New Orleans, Orleans Parish, Louisiana
- Mexico City (Mexico D.F.), Mexico
- Veracruz, Veracruz state, Mexico
- Veracruz, Veracruz state, Mexico
Kilgore, Gregg County, Texas [?]; Kilgore, Goliad County, Texas [?]

5.12 Description

**Dublin Core Element:** Description  
**Mandatory:** No  
**Public:** Yes  
**Searchable:** Yes  
**MARC Field:** 500

**Description:**

Use this field to include an annotation that provides information about the content of a resource and/or a more scholarly explanation or summary, written using free text.

**Style:**

Use this field to provide a freely-written descriptive annotation that is more scholarly than entries in the Notes field.

Use this field to include well-written captions from the item that are in addition to the title.

Use this field to place a single page or photograph within the context of a larger set or album.

Use this field to describe the set of items of which the single item is a part.
Cite the source(s) of factual information that is not generally known or easily checked. When creating source citations, follow the guidelines in 3.2.2 and 3.2.3.

Capitalize the first word in this field.

End this field with a period, unless it ends with a URL (see guidelines in 3.2.3, "About URLs").

**Examples:**

- This photograph is part of the Cananea, Mexico collection which includes 21 photographs of Cananea, Mexico, located just across the Arizona border, showing striking miners, armed men, demonstrations, the mine site, and American company employees.
- Inside the steam pump room at the water station in Lemberg.
- This tintype showing one child held by a "hidden father" or "hidden mother" exemplifies a genre of photography in which an adult is obscured with a blanket or fabric while holding a baby or child from behind or to the side. A frame or matte was then used to crop the image so that only the intended sitter(s) would be in view. Source: [Provide source citation]
- Illustration depicts Uncle Sam seated across a chessboard from a figure representing Mexico. On the chessboard are American soldiers and Mexican soldiers.
- In this typewritten speech, Dr. Hyer discusses the role education plays in a democracy to help citizens realize their full potential.
5.13 Notes

**Dublin Core Element:** Description  
**Mandatory:** No  
**Public:** Yes  
**Searchable:** Yes  
**MARC Field:** 500

**Description:**

Annotations that provide additional information about the attributes of the resource; a less formal description of the item, written using free text.

**Style:**

Do not precede information with the term *Note:*

Place notes that are not transcribed from the resource ahead of those that are.

Source information in this field, such as where Creator, Date, Place or other information is obtained if it is not found directly from the item. Such notes should be as concise as possible, including only a hyperlink or a shortened citation that includes some or all of (First Name Last Name, Title of Book/Article, hyperlink). You may even use only a hyperlink.

Use a note to explain discrepancies in dates, i.e. if there is a photograph on a postcard that was taken earlier than the postcard was printed, etc.

When transcribing from the resource, spell and punctuate the information *exactly* as it appears on the item. An exception to this guideline is made in cases where punctuation such as commas, periods, etc., are used to
improve the readability and/or clarity of the text. For example, always separate the lines of an address (i.e., name, street address, city and state) with a comma, space (,).

Check for Notes in the MARC record and include them whenever possible. Do not edit or change them unless necessary.

When transcribing a misspelled word from a resource, add the term [sic] directly after the word to indicate that the misspelling is not a cataloging error.

When a large amount of text is present on a resource, use your judgment regarding how much to transcribe. Use a mark of omission ( ... ) to indicate that text has been omitted or add a note about text that is not transcribed.

Transcribe the place of publication from a resource only when it is relevant to or would be helpful in finding and identifying the item. Omit secondary locations named in the imprint, particularly when their inclusion would negatively affect search precision, such as publisher locations in multiple cities.

Always indicate the location on the resource from which information is being transcribed. Use the terms Recto: and Verso: to denote that information is located on the front or back of an item. Use the term Negative sleeve: to denote that information is located on the sleeve of a negative.

Follow the location phrase (e.g., Recto:) with a notation regarding the form of the text (e.g., handwritten, imprinted, stamped). Lowercase the notation and enclose it in square brackets. If relevant, provide additional descriptive information (e.g., handwritten in red ink, handwritten in period script).

All text in brackets in notes is lower case, even if it forms a sentence, and does not include punctuation.

If access to a resource is restricted, enter the term Restricted access as the last note in the field.

Capitalize the first word in each note, whether or not it is in brackets.

Separate multiple notes (e.g., the recto note and the verso note) with a period, space (.).
Within a note, separate transcriptions of text located in different areas on the item (e.g., text that appears at the top, sides, and bottom of the recto or verso) with a period, space (.).

For quotation marks, use single apostrophes; do not use quotes or double apostrophes.

Only transcribe period, handwritten notes if they are short and/or important. If you do not transcribe them, put [handwritten note not transcribed].

For large blocks of text not transcribed use this note or a variation, typically at the end of the notes: [descriptive text not transcribed].

End this field with a period.

Useful terms and phrases: recto, verso, negative sleeve, stamped, imprinted, imprinted on negative, inscribed on negative, engraved on negative, caption, handwritten notation, transcription (see A.1 for definitions).

Examples:

- Verso: [stamped] Blessing & Brother, Gallery, Main Street, Houston-Texas. Duplicates can be had by sending name and No. of this Card.
- Notebook 1 has 163 pages. From the collection of Minas del Compromiso de Vetagrande records, 1788-1809. Three notebooks and one folder of 8 loose leaves. Each item also has been digitized as a .pdf. Material is in Spanish.
- Title from previous page. Restricted access.
- Date refers to date original photograph was taken; copy negative made later.

Date obtained from stamp box. Recto: [imprinted on negative] Planted by Us, Texas Nursery Co 24.


5.14 Related Resources

Dublin Core Element: Relation
Dublin Core Qualifier: References
Mandatory: No
Public: Yes
Searchable: Yes
MARC Field: 787

Description:

A summary of information, citations, and links to related resources.
Style:

Refer to related resources either by title or by URL.

Enter the URL for the SMU Library Catalog bibliographic record for the accession, if one exists, using the format shown in the example below.

Refer to the finding aid, if one exists.

Do not place any mark of punctuation directly after a URL, as doing so causes CONTENTdm to break the hyperlink. Separate a URL from any text that follows with two spaces ( ).

Use this field to link to related or identical items made from the same negative in CUL Digital collections, i.e. Related postcard: (hyperlink). Place this information first, i.e. before the MARC record and/or finding aid. For multiple items put two spaces between each hyperlink, with no punctuation or wording, e.g. Related photographs: (hyperlink) (hyperlink)

When referring to a similar item do not use the term "duplicate". Use "Print made from the same negative" or "Imprint made from the same negative" or "Related photograph: hyperlink"

Optional: Add a phrase or description about the relationship cited.

Examples:

- View unlabeled image at: http://digitalcollections.smu.edu/cdm/ref/collection/mav/id/26
5.15 Authorized Subject Terms

**Dublin Core Element:** Subject  
**Mandatory:** Yes  
**Public:** Yes  
**Searchable:** Yes  
**MARC Field:** 6XX

**Description:**

Authorized terms from a controlled vocabulary, primarily the Library of Congress Subject Headings and Name Authorities, which describe the subject(s) of a resource.

**Style:**

*Shared controlled vocabulary.*

Use these sources for authorized subject terms in order of preference.

- Library of Congress Subject Headings  
- [Art & Architecture Thesaurus (AAT)](http://www.loc.gov/standards/ataloader/infoguide.html)  
- [Thesaurus for use in College and University Archives (SAA)](http://www.saa.org/standards/thesauri.html)

You can use SearchFast to search Library of Congress Subject Headings: [http://fast.oclc.org/searchfast/](http://fast.oclc.org/searchfast/)
You can use id.loc.gov or http://authorities.loc.gov/ to search Library of Congress Subject Headings and Art & Architecture Thesaurus (AAT).

Include all dashes or information found in parentheses.

The recommended number of subject terms is 3-7. Use general terms that exemplify the most salient aspects of the resource.

Separate terms with a semicolon, space (; ).

Include the LOC name or corporate authority if the person or company is a subject. If an LOC name authority is not available, follow LOC style to create a heading, providing the fullest form available (e.g., last name, first name, middle name/initial, birth and death dates). Submit the original spelling, i.e. from the item, if it is available and your proposed authorized version of the name in the Local Name Authorities spreadsheet for approval. Add any important notes or URLs in the Notes column.

If subject term that will be used multiple times for a specific event or building is not available, create the term and place your proposed authorized version of the name in the Local Subject Authorities spreadsheet for approval. Add any important notes or URLs in the Notes column. Example: 1908 Galveston Flood.

Do not use form/genre terms (e.g., Paintings, Photographs, Portraits, Panoramic views) as subject terms. Instead, enter them in the Form/Genre field.

Use the terms men, women, and children as keywords only for images that are portraits (see 5.18 for TGM scope notes on the term Portraits).

Use free-form terms in the Keywords field. For example, use the authorized name for a railroad and common acronyms that people may use in searching in the keywords field.

It is extremely important to be consistent within a digital collection and between digital collections. Review items already cataloged from the same accession or that depict similar content, so that similar terms are used.
5.15.1 Important terms to use

Confederate States of America. Army (in Keyword field use Confederates; Confederacy; CSA)

United States. Army (in Keyword field use U.S. Army)

For Union army-related Civil War items, use United States. Army (in Keyword field use Union Army; U.S. Army; Federal Army)

World War (1914-1918) (in Keyword field use World War 1, World War I, WW1)

World War (1939-1945) (in Keyword field use World War 2, World War II, WW2)

Always uses Railroads, in addition to other railway terms.

North America--Mexican-American Border Region (in Keyword field use U.S. Mexico border)

Revolution (Mexico : 1910-1920) (in Keyword field use Mexican Revolution)

U.S. Army's Punitive Expedition into Mexico (1916) (in Keyword field use Pershing Expedition)

Railroad stations; Railroads (use both and in Keyword field use depots; train stations)

Railroad accidents (in Keyword field use wrecks; derailments)

Indians of North America

African Americans

Examples:

- Queensland--Mount Morgan; Mines and mineral resources; Mining engineering
- Business enterprises; Cities and towns; Office buildings; Adolphus Hotel (Dallas, Tex.)
- Railroad bridges--Design and construction; Railroads
Floods; Flood damage; Natural disasters; Railroad bridges; Railroad tracks; Texas & Pacific Railway; Trestles; Texas--Trinity River; 1908 Trinity River Flood
Southern Methodist University; College student newspapers and periodicals; College students
Mexican War, 1846-1848; United States. Army; Chapultepec, Battle of, Mexico City, Mexico, 1847; Quitman, John Anthony, 1798-1858
Johnson, Lyndon B. (Lyndon Baines), 1908-1973; Democratic Party (U.S.); American presidential elections; Political campaigns; Presidential candidates; Political candidates; Political slogans

5.16 Keywords

Dublin Core Element: Subject
Mandatory: Yes
Public: Yes
Searchable: Yes
MARC Field: 6XX

Description:
Free-form words and phrases, not available as Authorized Subject Terms, which describe the subject of a resource.

Style:
Only use words that cannot be found as authorized subject terms. In many cases, this field will be blank.
Do not capitalize the first word in this field—capitalize only proper nouns.
Separate terms with a semicolon, space (; ).
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Do not use closing punctuation in this field.

Use plural forms of words. Note: CONTENTdm provides an exact search. If you believe the singular form of a word is likely to be used as a search term, enter the singular form as a keyword.

With only two exceptions listed below (RPPC and stereoviews), do not use form/genre terms (e.g., Paintings, Photographs, Portraits, Panoramic views) as keywords. Instead, enter them in the Form/Genre field.

Do not enter place information in the Keywords field if it is included in the Place field. (Some earlier records may include place information as a keyword.)

Use the keyword stereoviews for all stereographs.

Alternate spellings and abbreviations of railroad names: Try not to use more than three. Do not repeat the controlled term that goes into the Railroad Line field or Authorized Subject Term. Do not use spaces around the ampersand. Avoid terms that use periods since most people will not type those in. Use the reporting symbol. Check previous records to ensure consistency.

It is extremely important to be consistent within a digital collection and between digital collections. Review items already cataloged from the same accession or that depict similar content, so that similar terms are used.

5.16.1 Important keywords to use

U.S. Army (in Authorized Subject Terms field use United States. Army)

For Union-related Civil War items, use the keywords U.S. Army, Union Army; U.S. Army; Federal Army (in Authorized Subject Terms field use United States. Army)

Confederates; Confederacy; CSA (in Authorized Subject Terms field use Confederate States of America. Army)

World War 1, World War I, WW1 (in Authorized Subject Terms field use World War (1914-1918))

World War 2, World War II, WW2 (in Authorized Subject Terms field use World War (1939-1945))
U.S. Mexico border (in Authorized Subject Terms field use North America--Mexican-American Border Region)
Mexican Revolution [in Authorized Subject Terms field use Revolution (Mexico : 1910-1920)]
Pershing Expedition [in Authorized Subject Terms field use U.S. Army's Punitive Expedition into Mexico (1916)]
depots; train stations (use both as keywords and in Authorized Subject Terms field use Railroad stations)
wrecks; derailments (use both as keywords and in Authorized Subject Terms field use Railroad accidents)
RPPC (in Form/Genre field use Real photographic postcards)
stereoviews (in Form/Genre field use Stereographs)

Examples:
- RPPC; downtown; skyline; Southwestern Life Building; Great Southern Life Building; Praetorian Building
- RPPC; T&P; TP
- SMU
- Mexican-American War; U.S. Army; U.S. Mexico Border

5.17 Original Media

Dublin Core Element: Source
Mandatory: No, if using Physical Description element
Public: Yes
Searchable: Yes
MARC Field: 534
Description:

The Original resource from which the digital resource was derived. There may be two types, the original resource and a digitized version. Typically, use the Physical Description field (4.18). Original Media is used upon request by the collection holder.

Style:

An alternative to Physical Description field.

Always use either the Physical Description or the Original Media field.

Precede description with the term Original resource provided as:

Use free text, but use the same terms, (e.g., gelatin silver print, albumen print) throughout the collection.

Use standard abbreviations and style that are common in the field of study.

Use lowercase, except for proper nouns, acronyms, and initialisms.

Do not use closing punctuation in this field.

Examples:

- Original resource provided as: 16 mm film
- Original resource provided as: 1/2-inch VHS
- Original resource provided as: ceramic sculpture
- Original resource provided as: printed newsletter
5.18 Physical Description

**Dublin Core Element:** Source  
**Mandatory:** No, if using Original Media element  
**Public:** Yes  
**Searchable:** Yes  
**MARC Field:** 300

**Description:**
Description of the physical characteristics of the original resource; includes extent, carrier type, other physical details, and dimensions.

**Style:**
Always use either the Physical Description or the Original Media (4.17) field.

See A.2 for definitions of major terms used in this field.

Record information in the following order: (1) extent; (2) other physical details; and (3) dimensions.

*Note:* These style conventions are based on guidelines in Resource Description and Access (RDA), Chapter 3, [http://access.rdatoolkit.org/](http://access.rdatoolkit.org/), with a local customization for items that are units of a multi-part item, e.g. a
photograph or print in an album or portfolio. AACR2 style may have been followed in earlier records. Leave physical descriptions in existing records as is.

**Extent**

Extent is "the number and type of units and/or subunits making up a resource."

Describe the type of unit using an appropriate term from the list of RDA carrier types, which is available at [http://www.loc.gov/standards/valuelist/rdacarrier.html](http://www.loc.gov/standards/valuelist/rdacarrier.html) and in RDA, Chapter 3.3.1.3, "Recording Carrier Type," [http://access.rdatoolkit.org/](http://access.rdatoolkit.org/). See also RDA, Chapter 3.4.4, "Extent of Still Image," and Chapter 3.4.5, "Extent of Text." Separate the number of units and the carrier type with one space ( ). Record terms in singular or plural, as appropriate.

The list of unmediated carriers is

- card
- flipchart
- object
- roll
- sheet
- volume

When applicable, use a more precise term or terms such as *photographic print* or *portfolio* to describe the carrier type of a still image. RDA gives us leeway in describing still images (see 3.4.4.2 Recording Extent of Still Images, [http://access.rdatoolkit.org/](http://access.rdatoolkit.org/)), e.g. we are permitted to say, for example, “1 photograph” rather than “1 sheet.” Based on the "Recording Extent of Still Images" dispensation and in keeping with the “1 photograph [etc.]” style, use descriptive terms for prints, drawings, maps, etc., i.e. use “1 map” instead of 1 sheet.

Use the term volume when there is a bound entity. For pamphlets and leaflets, use the number of pages, e.g. 2 pages.
When recording the extent of a resource that is an individual entity, give the number of units of the resource and the carrier type (e.g., 1 photographic print, 1 stereograph card).

When recording the extent of a multi-part resource that is an aggregation of entities (e.g., albums, portfolios), follow the number of units and carrier type of the resource with the total number of constituent parts (i.e., subunits), enclosed in parentheses and preceded by one space ( ). For example, the extent of an album containing 25 albumen prints is recorded as 1 volume (25 albumen prints). If the total number of subunits in a resource cannot easily be determined, omit that information.

If the number of pages in the physical and digital manifestations of a resource differs, use the number of pages or leaves given in the SMU Library Catalog bibliographic record for the accession.

If there is no pagination information on the item, only use information from the MARC record. Do not create pagination information.

**Other Physical Details**

The term *other physical details* includes attributes such as print process, base material, mount, and color.

Other physical details follow the extent of the resource, preceded by a colon, space (: ).

Separate multiple details with a comma, space (, ).

When an item is a subunit of a multi-part resource that is an aggregation of entities (e.g., pages of albums, prints in portfolios), follow any physical details with the extent of the resource of which it is a part. Use the format Other Physical Details, space ( ), part of, space ( ), extent of multi-part resource. For example, the extent and other physical details of one lithograph in a portfolio containing four prints is recorded as 1 print: lithograph, part of 1 portfolio (4 lithographs). If the total number of subunits in a resource cannot easily be determined, omit that information.

**Photographs and photographic prints:**
Include the photographic print process (e.g., albumen, ambrotype, daguerreotype, gelatin silver, salted paper, tintype) if it is known.

Always include the term color in the physical description of items such as color prints and postcards. For hand-colored items use the term hand-colored.

For images that appear black and white, do NOT use the term black and white.

**Dimensions**

Dimensions are "the measurements of the carrier or carriers and/or the container of a resource."

Dimensions follow other physical details of the resource, preceded by a semicolon, space (; ).

When other physical details are not provided, dimensions appear directly after the extent of the resource, preceded by a semicolon, space (; ).

Record height x width in centimeters. The recommended guideline is to measure to the closest centimeter, i.e. .5 and above round up, .4 and below round down. Smaller measurements are acceptable, e.g. the nearest half or tenth of a centimeter.

Use the metric symbol cm. Note: Symbols for metric measurements (e.g., mm, cm, m, KB, MB, GB) are not abbreviations and are not followed by a period.

You do not need to follow a full number with a decimal, e.g. 13 x 21 cm NOT 13.0 x 21.0 cm. Earlier items that were cataloged in this style do not need to be changed.

For still images, measure the pictorial area. Give dimensions with reference to the position (i.e., portrait or landscape orientation) in which the image is intended to be viewed.

If appropriate, follow the dimensions of an image with those of the carrier or container. Indicate the specific area to which additional measurements apply.
Put measurements for postcards. Earlier postcards were cataloged without measurements per AACR21 rules.

Do not use closing punctuation in this field.

Examples:

- 1 photograph: sixth plate daguerreotype; 7 x 8 cm
- 1 photograph: sixth plate tintype, hand-colored; 9 x 8 cm (case)
- 1 photographic print: albumen; 20 x 25 cm
- 1 photographic print: gelatin silver; 13 x 21 cm
- 1 photographic print (postcard): gelatin silver; 9 x 14 cm
- 1 photomechanical print (postcard): color; 9 x 14 cm
- 1 photomechanical print (postcard): color on linen, 9 x 14 cm
- 1 photomechanical print: color; 28 x 21 cm
- 1 photographic print: gelatin silver; 16 x 21 cm on 25 x 33 cm mount
- 1 photographic print; gelatin silver, part of 1 volume (42 gelatin silver prints); 24 x 29 cm on 30 x 41 cm mount
- 1 volume (104 albumen prints); 27 x 40 cm
- 1 album cover: part of 1 volume (75 gelatin silver prints); 31 x 42 cm
- 1 photographic print on stereo card: stereograph, albumen; 9 x 18 cm
- 1 technical drawing: blueprint; 51 x 78 cm
- 10 sheets; 36 x 22 cm
- 30 x 24 inches
- 1 drawing: 59 x 37 cm
- 1 object: button; 2.1 cm

Full Object vs. Item Level Physical Description Examples
The resource is a 32 x 22.4 cm pamphlet of 8 pages.

- Full object-level description: 1 volume (8 pages); 32 x 22.4 cm
- Page or item-level description: 1 sheet: part of 1 volume (8 pages); 32 x 22.4 cm

The resource is a 27 x 32 cm pamphlet of 24 mounted prints; described in bibliographic record as "25 leaves of plates, one folded."

- Full object-level description: 1 volume (25 leaves of plates, one folded); 27 x 32 cm
- Page or item-level description: 1 print: part of 1 volume (25 leaves of plates, one folded); 15 x 20 cm on 26 x 32 cm mount

The resource is a 27 x 40 cm album of 104 albumen prints.

- Full object-level description: 1 volume (104 albumen prints); 27 x 40 cm
- Page-level description: 1 photograph album cover: part of 1 volume (104 albumen prints); 27 x 40 cm
- Page- or item-level description: 1 photographic print: albumen, part of 1 volume (104 albumen prints); 27 x 40 cm

The resource is a 31 x 41 cm portfolio of 4 lithographs.

- Full object-level description: 1 portfolio (4 lithographs); 31 x 41 cm
- Page or item-level description: 1 print: lithograph, part of 1 portfolio (4 lithographs); 31 x 41 cm

The resource is a 15 x 19 cm portfolio of 20 mounted cyanotypes.

- Full object-level description: 1 portfolio (20 cyanotypes); 15 x 19 cm
- Page or item-level description: 1 photographic print: cyanotype, part of 1 portfolio (20 cyanotypes); 11 x 8 cm on 18 x 14 cm mount

Important Clarification: Do Not Guess!
Our goal in creating descriptive metadata is to provide sufficient information to help users “find, identify, select, and obtain” sought-after resources in our digital collections. We also want to create metadata in the most efficient way possible. To this end, as a general rule, if we can’t readily, accurately identify or otherwise determine “other physical details” for inclusion in the Physical Description field, we will simply provide the information we have and move on. For example, do not attempt to include information about the medium if you are not sure about it, e.g. pencil, charcoal, watercolor, ink, etc. Rather, follow this format: 1 drawing: hand-colored; 18 x 24 cm or 1 drawing; 32 x 22 cm.

5.19 Form/Genre

**Dublin Core Element:** Source  
**Mandatory:** Yes  
**Public:** Yes  
**Searchable:** Yes  
**MARC Field:** 655

**Description:**

Categorization of the original resource based on characteristics such as its function, intended purpose, method of representation, or type of content; the type of object it is.

**Style:**

*Shared controlled vocabulary.*
Use from TGM II (Genre and Physical Characteristic Terms), http://www.loc.gov/rr/print/tgm2/tgm2.txt.

When necessary, a non-TGM term (e.g., Scores) can be added to the controlled vocabulary for the Form/Genre field in CONTENTdm. The addition of an authorized term must be approved in advance by the CUL digital collections developer.

Use as many terms as apply (see A.3 for definitions of major TGM and authorized CUL Digital Collections form/genre terms).

Separate multiple entries with a semicolon, space (; ).

Do not use broad terms that are repeated word-for-word in more narrow terms.

- Don’t use all four: Negatives; Film negatives; Copy negatives; Reproductions
  Just Use: Film negatives; Copy negatives; Reproductions

- Don’t use: Real photographic postcards; Photographic postcards
  Just Use: Real photographic postcards (this term is not in TGM, but has been authorized; always add RPPCs as a keyword)

- Don’t Use Both: Photographs; Portrait photographs
  Just Use: Portrait photographs

Do not use closing punctuation in this field.

**Resources that are an aggregation of entities:**

Include the term that is applicable to the resource (e.g., Books, Photograph albums, Portfolios, Documents) in the Form/Genre field of each item that is a constituent part of the resource. For example, the term *Photograph albums* is entered in the Form/Genre field of each photograph in the album.

**Specific Notes**
For cased images, use the Form/Genre TGM term Photograph cases, and in the Keywords add “cased photographs.”

When using Tintypes, do not use Photographs prints.

Only use Group portraits with large groups of people.

For portrait photographs, use the term Portrait photographs, not Portraits.

For cityscapes, use the term Cityscapes, i.e. not Cityscape photographs; Cityscape paintings, etc.

**Examples:**

- Photographs; Photographic prints; Photograph albums; Albumen prints
- Photographs; Photographic prints; Portrait photographs; Card photographs; Cartes de visite
- Photographs; Photographic prints; Photographic postcards; Gelatin silver prints
- Photographs; Ambrotypes; Portraits; Photograph cases
- Photograph albums; Photograph album covers; Photographs; Photographic prints; Gelatin silver prints
- Drawings; Pencil works; Metalwork
- Slides; Bronze; Metals; Metalwork; Sculpture
- Motion pictures; Video recordings
- Sound recordings; Concerts
- Design drawings; Contract drawings; Proposed works
- Badges; Memorabilia

**5.20 Railway Identifier**

**Dublin Core Element:** Description
Mandatory: No
Public: Yes
Searchable: Yes
MARC Field: 720

Description:
Free-text field for DeGolyer Library projects used to describe the railroad’s short line nickname or the nickname of the car.

Style:
Always enter the railway, if it is available, in the Railway Line field.

Examples:
- Sunset Limited
- Guthrie & Company
- Villa del Mar
- Cusi
- Felipe Carrillo Puerto

5.21 Locomotive/Car Number

Dublin Core Element: Description
Mandatory: No
Public: Yes
Searchable: Yes
**MARC Field:** 500

**Description:**
The locomotive or car number used in DeGolyer Library projects.

**Style:**
Enter the term *Locomotive* or *Car* followed by the number.

**Examples:**
- Locomotive 2003
- Locomotive 122
- Car 06
- Car 3627

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**5.22 Railway Line**

**Dublin Core Element:** Description  
**Mandatory:** No  
**Public:** Yes  
**Searchable:** Yes  
**MARC Field:** 710
Description:
Name of the railway company used in DeGolyer Library projects.

Style:

Controlled vocabulary.

If an authorized term has not previously been created, find the railway line in LC Name Authority Headings.

If an LC authorized heading does not exist, spell out the full name of the railway company and use LC style to create the term.

Add newly-created terms to the controlled vocabulary for the Railway Line field in CONTENTdm.

Enter notable variations of the railway name, including accepted abbreviations, acronyms, and initialisms, in the Keywords field.

Note: There are two possible authorized terms for Southern Pacific. Use Southern Pacific Railroad for items dated 1865-1885, and use Southern Pacific Company for items dated 1885-1969. When the railway line is Southern Pacific Company, always enter Southern Pacific Railroad in the Keywords field.

Examples:
- Atlantic Coast Line Railroad Company
- St. Louis & San Francisco Railway Company
- International & Great Northern Railroad
- Alabama & Vicksburg Railway
- Chicago & North Western Railway Company
- Ferrocarriles Nacionales de Mexico
- Ferrocarril Chihuahua al Pacifico
- Gobierno Federal Mexicano
Chapter 6: Technical Metadata

Note: Always refer to and follow the guidelines in 4.2, "Style Guidelines for Cataloging," when creating CUL Digital Collections metadata records.

6.1 Digital Resource Type

Dublin Core Element: Type
Mandatory: Yes
Public: Yes
Searchable: Yes
MARC Field: 336

Description:

Categorization of the digitized resource based on the type of object it is.

Style:

Our set of terms is listed below in "Examples."

When necessary, terms can be added. The addition of a term must be approved in advance by the CUL digital collections developer.
Examples:

- Image
- Text
- Video
- Audio
- Printed music

6.2  Digitization Date

**Dublin Core Element:** Date  
**Mandatory:** Yes  
**Public:** Yes  
**Searchable:** No  
**MARC Field:** 264

**Description:**

Date that the digital resource was created.

**Style:**

Give the year the resource was digitized. *Note:* The creation date for the original resource is entered in the Date field.

Include the term *Digitized:* before the date.

Do not use closing punctuation in this field.
Example:

- Digitized: 2009

6.3 Digital Format

Dublin Core Element: Format
Mandatory: Yes
Public: Yes
Searchable: Yes
MARC Field: 347, 516

Description:

Basic characteristics such as file size, dimensions, duration, etc., of the derivative file uploaded to CONTENTdm. In the case of audio or video presented as streaming files in SoundCloud or Vimeo, describe the streaming file (not the .html file that is actually uploaded into CONTENTdm).

Style:

When referring to file types, use period followed by three-letter file extension. Exception: .html.

For still images, describe the format in which the upload file is displayed in CONTENTdm using the three-letter file extension. Precede file extension with the term Displayed as.
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If the upload file is displayed in JPEG2000 format (i.e., .jp2), also provide the format of the upload file. Precede the file extension of the upload file with the term *uploaded as*.

For documents presented as a .pdf, precede file extension with the term *Displayed as*. Include the number of pages in the .pdf, which may differ from the number of pages in the original resource, and the file size. Precede the number of pages with a semicolon, space (; ). Follow with a comma, space (, ), and the file size. *Note:* This information may have been included in the Digitization Process field in earlier records. Leave this information in existing records as is.

For audio-video files, use as much detail as possible about the streaming file.

Separate areas of the description with a semicolon, space (; ).

Use the six digit space for Total Running Time (TRT), e.g. 00:42:58.

Do not use closing punctuation in this field.

**Examples:**

- Displayed as .jp2; uploaded as .jpg
- Displayed as .pdf; 3 pages, 1.5 MB
- Displayed as .mov streaming file embedded in .html page
- TRT 00:10:08.30; Streaming File: Presented in Vimeo as 640 x 480
- Displayed as .mp3 streaming file embedded in .html page; TRT (Track 1) 00:12:36, 192 kbps, MPEG Layer 3 Audio, 17.3 MB; TRT (Track 2) 00:36:57, 192 kbps, 50.7MB; Streaming file presented in Soundcloud
- Displayed as .mov streaming file embedded in .html page; TRT: 00:42:58; MPEG-4 AVC, H.264, Quicktime; Aspect Ratio: 16:9, pillarbox; Resolution: 1920 x 1080; Frame rate: 23.98 fps; Audio: Mono, PCM, 48 khz, 16 bps; 10.3 GB; Streaming file presented in Vimeo
6.4 Archival File Resolution

**Dublin Core Element:** Format

**Mandatory:** No

**Public:** Yes

**Searchable:** Yes

**MARC Field:** 347

**Description:**

The pixel array, bit depth information, and color space of the archival file.

**Style:**

Precede description of pixel array, bit depth, and color space with the term *Archival scan:* or, if another digital capture process was used, with the term *Archival file:*

Give image resolution in width x height (e.g., 5700 w x 4100 h pixels). *Note:* Resolution may have been expressed as ppi or dpi in earlier records. Leave archival file resolution in existing records as is.

Do not use a comma within the number describing resolution.

For composite images, list the pixel array individually for recto and verso. Separate descriptions with a semicolon, space (; ).
For audio-visual materials, provide technical details of the master file(s) similar to the format for derivative files, as described in Digital Format (5.3).

Do not use closing punctuation in this field.

*Note:* This field differs from the Physical Description field, in which dimensions are given in height x width.

**Examples:**

- Archival scan: 6400 w x 4800 h pixels, 48-bit RGB
- Archival scan: 3018 w x 4903 h pixels, 48-bit RGB (recto); 3020 w x 4900 h pixels, 48-bit RGB (verso)
- Archival file: 5616 w x 3744 h pixels

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**6.5 Digitization Process**

**Dublin Core Element:** Format  
**Mandatory:** Yes  
**Public:** Yes  
**Searchable:** No  
**MARC Field:** 538

**Description:**

The technical information about the hardware, software, and processes used to create the archival and upload files.
Style:

Precede description of digitization process with the term *Digitization process:*

Include information that an item has been color balanced, cropped, and/or adjusted in the section that describes the derivative.

Do not use a comma within the number describing resolution.

Capitalize the first word of the description.

Separate sections of the description with a semicolon, space (; ).

Do not use closing punctuation in this field.

Examples:

- *For flatbed scanning*

  Digitization process: Master scanned using Epson V750 Pro as 600 ppi, 48-bit, RGB .tif; derivative resampled as 3000 w pixels, 24-bit .jpg

  Digitization process: Master scanned using Epson V750 Pro as 1200 ppi, 48-bit, RGB .tif; service master color corrected and cropped; derivative resampled as 3000 w pixels, 24-bit .jpg

  Digitization process: Recto and verso each scanned using Epson V750 Pro as 600 ppi, 48-bit, RGB .tif; recto and verso files combined to make composite derivative and resampled as 3000 w pixels, 24-bit, RGB .jpg

  Digitization process: Master scanned using an Epson 750 as 1200 ppi, 48-bit, RGB .tif; service master changed to black and white, hues and contrast adjusted, and cropped; derivative resampled to 3000 w pixels, 24-bit .jpg
Digitization process: Scanned using an Epson 750 as 1200 ppi, 48-bit, RGB, .tif; service master adjusted and cropped; derivative resampled to 3000 pixels on the long edge, 24-bit .jpg

This statement may be used to save time when providing information for large accessions with both horizontal and vertical images:

Digitization process: Master scanned using Epson V750 Pro as 600 ppi, 48-bit, RGB .tif; derivative resampled as 3000 pixels on the long edge, 24-bit .jpg

- For .pdf files

Digitization process: Pages scanned as 600 ppi, 48-bits per channel, RGB .tif files; .pdf created and compressed in Adobe Acrobat

Digitization process: Archival photographs of each page created at 16352 w x 12264 h pixels; pages cropped and resized in Photoshop; .pdf created and optimized in Acrobat with .jpg derivatives

Digitization process: Original newspaper copied, then scanned; files turned into multiple page, searchable .pdf

- For Bookeye scanner

Digitization process: Master scanned using Bookeye scanner as 9071 w x 7370 h pixels, 24-bit, RGB .tif; scan cropped to a 5000 w x 3000 h pixels, 24-bit, RGB .tif; master file cropped and resampled as 3000 w pixels, 24-bit, RGB .jpg

Digitization process: Scanned with Bookeye scanner, master file cropped to 4280 w x 5702 h pixels and saved as 380 ppi, 16-bit .tif; derivative resized to 3000 w pixels and resaved as 8-bit .jpg

- For digital photography

Digitization process: Photographed using a Hasselblad H4D-200MS as 48-bit, RGB, .tif file; derivative cropped and resampled to 3000 pixels on the long edge, 24-bit .jpg
For digital video recording

Digitization process: Received as 16 mm film; transferred to DV format using telecine; web file compressed in Quicktime Pro using AAC Stereo and h.264 (768 kbps), saved as MPEG-4

Digitization process: Digital master video file created from original media as 24p capture from HD camera with direct, line level audio from magnetic soundtrack. Compressed and edited in Adobe Premiere
Chapter 7: Administrative Metadata

Note: Always refer to and follow the guidelines in 4.2, "Style Guidelines for Cataloging," when creating CUL Digital Collections metadata records.

7.1 Physical Location

**Dublin Core Element:** Identifier  
**Mandatory:** No  
**Public:** Yes  
**Searchable:** Yes  
**MARC Field:** 535

**Description:**

Information concerning box, series, and other archival storage details.

**Style:**

Capitalize terms such as *Box* and *Series*.

Separate terms with a comma.

Do not use closing punctuation in this field.
Examples:

- Box 3, Folder 21
- Cabinet 1, Drawer 1

7.2 Call Number

**Dublin Core Element:** Identifier  
**Mandatory:** Yes  
**Public:** Yes  
**Searchable:** Yes  
**MARC Field:** 090

**Description:**

Call number of the original resource from which the digital object was derived or created.

**Style:**

*Shared controlled vocabulary.*

Record the call number *exactly* as it appears in the SMU Library Catalog holdings record for the accession.  
Do not use closing punctuation in this field.  
If an authorized term has not previously been created, add it to the controlled vocabulary for the Call Number field in CONTENTdm.
Examples:

- Ag1982.0231
- E83.89 .M55 1891
- Folio-2 F804.T2 A93
- Broadside KFT1600.5 1836 .A3
- Pamphlet HE2791 .H242 1880
- Mss 0060

7.3 Identifier

Dublin Core Element: Identifier
Mandatory: No
Public: Yes
Searchable: Yes
MARC Field: 02X

Description:

Generally retired, but reserved for special identifying information (e.g., ISBN, file name, character string, reference URL).

Style:

Do not use closing punctuation in this field.
7.4 Upload File Name

Dublin Core Element: Identifier
Mandatory: Yes
Public: Yes
Searchable: Yes
MARC Field: 856

Description:
Name of the file uploaded to CONTENTdm, including the three-letter file extension.

Style:
Record the file name, including the three-letter file extension. Exception: .html for web pages.

Do not use closing punctuation in this field.

Examples:
- ag2005_0001_01_brackettville_001c_opt.jpg
- ephemera_c920_opt.pdf
- ag1986_0583_04_opt.jpg
- ag2005_0004_04_seward_opt.jpg
- ag2001_136_01_r_opt.jpg
7.5 Archival File Name(s)

**Dublin Core Element:** Relation  
**Dublin Core Qualifier:** HasFormat  
**Mandatory:** Yes  
**Public:** Yes  
**Searchable:** Yes  
**MARC Field:** 787

**Description:**
Name of file(s) from which optimized upload derivative was derived, including three-letter file extension.

**Style:**
Record the file name(s), including the three-letter file extension.

Include master and service master file(s). Separate file names with a semicolon, space (; ).

Provide only the page range for 4 or more files. Include the name of the first file and the last file, separated by a space, hyphen, space (- ).

Do not use closing punctuation in this field.
Examples:

- ag1983_0282_01.tif
- ag1983_0282_01.tif; ag1983_0282_01_sm.tif
- ag1982_0122x_35.CR2; ag1982_0122x_35_sm.tif
- ag2001_136_01_r.tif; ag2001_136_01_v.tif
- ttb_13_miracleinharlem_up.mp4

7.6 Digital Collection

**Dublin Core Element:** Identifier

**Mandatory:** Yes

**Public:** Yes

**Searchable:** Yes

**MARC Field:** 856

**Description:**

The name of the digital collection to which the item belongs.

**Style:**

*Shared controlled vocabulary.*

Record the name of the digital collection *exactly* as it appears on the collection home page in CONTENTdm.

Do not use closing punctuation in this field.
When a new digital collection is created, add the name to the controlled vocabulary for the Digital Collection field in CONTENTdm.

**Examples:**

- Texas Artists: Paintings, Sculpture, and Works on Paper
- JCPenney Dynamo Newsletters
- Tyler, Texas Black Film Collection
- Hervey A. Priddy Collection of American Presidential and Political Memorabilia
- George W. Cook Dallas/Texas Image Collection
- Mexico: Photographs, Manuscripts, and Imprints
- Potter Art Iron Studios Collection

7.7 **Library**

**Dublin Core Element:** Publisher  
**Mandatory:** Yes  
**Public:** Yes  
**Searchable:** Yes  
**MARC Field:** 535

**Description:**

The library or office to which the original resource belongs.

**Style:**

*Shared controlled vocabulary.*
When necessary combine units. Separate units with a semicolon, space (; ).

Do not use closing punctuation in this field.

**Examples:**

- Bywaters Special Collections; Hamon Arts Library
- G. William Jones Film and Video Collection; Hamon Arts Library
- DeGolyer Library
- SMU Archives
- Edwin J. Foscue Map Library
- Fort Burgwin Library (SMU-in-Taos)
- Government Information Resources
- Hamon Arts Library
- Meadows Museum
- Dallas Museum of Art

### 7.8 Publisher

**Dublin Core Element:** Publisher  
**Mandatory:** Yes  
**Public:** Yes  
**Searchable:** Yes  
**MARC Field:** 264
Description:

An entity or entities responsible for the digital publication of the item.

Style:

Use the name of the organization that is responsible for publishing the digital resource. Note: The publisher of the original resource is entered in the Contributor(s) field.

In the case of a hierarchy, list the levels of an organization from the smallest to the largest, separated by a comma, space (, ).

Separate multiple entities with a semicolon, space (; ).

Examples:

- Central University Libraries, Southern Methodist University
- Frank Smith, Jr. Library Center, Southwestern University (Georgetown, TX)

Rights

Dublin Core Element: Rights
Mandatory: Yes
Public: Yes
Searchable: No
MARC Field: 540
Description:

A rights management statement that contains information concerning accessibility, reproduction of images, copyright holder, restrictions, securing permissions for use of text or images, etc.

Style:

Use one of the statements provided below in "Examples." The CUL digital collections developer determines which statement is appropriate for the resource.

New statements must be approved in advance by the CUL digital collections developer.

Use Statement 1 for works in the public domain.

Use Statement 2 for works to which SMU clearly holds the rights.

Use Statement 3 for orphan works or for works for which SMU does not hold publishing rights. Such items must be made available on a restricted basis (e.g., the metadata is visible to off-campus users, but the image is visible only to campus IP addresses). Enter the term Restricted access. in the Notes field.

For items that may be under copyright, but are not being uploaded with restricted access, please upload a derivative that is 750 pixels on the long edge. In select cases, we may still upload the item at 3000 pixels.

For collaborative projects, use alternative wording based on the needs of rights holders outside of SMU.

Examples:

- Statement 1

Please cite Southern Methodist University, Central University Libraries, DeGolyer Library when using this image file. A high-quality version of this file may be obtained for a fee by contacting degolyer@smu.edu.
7.10 Tags

- **Dublin Core Element:** None
- **Mandatory:** Yes
- **Public:** No
- **Searchable:** Yes
- **MARC Field:** None

**Description:**

This is a hidden searchable field.
Style:

*Shared controlled vocabulary.*

Include the upload date and the name of each digitizer and cataloger who works on the item.

Use the following format for the upload date: cul_month_yyyy

*Compound objects:* Always include the term *compound_object* in the Tag field of the compound object-level metadata.

Separate entries with a semicolon, space (; ).

If an authorized term has not previously been created, add it to the controlled vocabulary for the Tags field in CONTENTdm.

Examples:

- cul_september_2012; John_M; Carol_M
- cul_march_2013; compound_object; John_M
- cul_november_2015; john_m; margaret_c_cat
- cul_december_2015; john_m; Eldric_B
Appendix A: Definitions

A.1 Notes Field

The following terms and/or their derivatives may be useful when describing the attributes of a resource in the Notes field. These definitions are provided to promote consistent usage.

- **Binding** (noun): "The method of holding pages or sheets together; may be simply stapled or sewn, or sewn and enclosed in wrappers, but most often refers to a 'hard' binding or covers. This type of binding may be covered with cloth, various leathers, or paper over boards or other more exotic materials. The binding can be done by hand or by machine as in a publisher's 'trade binding.'"

- **Colophon** (noun): "A statement occurring at the rear of a volume following the text, relating information about the printing history and physical aspects of the book; often includes name of printer, type of paper, typeface, size of edition, date of printing, etc. Early books often had a colophon instead of a title page imprint and modern private press or other examples of fine printing often use a colophon."

- **Covers** (noun): "The binding of a book; i.e. cloth, calf, morocco, boards, wrappers, etc."

- **Cursive** (adjective): "Written with the characters joined: *cursive script*." (Adjective: *embossed*

- **Emboss** (verb): "To create a raised design or relief on a flat surface, usually of metal or paper, by pressing or hammering a design into the back side. *Embossment* is the result of having been embossed." (Adjective: *embossed*)

- **End paper** (noun): "Paper, often of coated stock or marbled paper or otherwise 'fancy' paper, with one half pasted to the cover; used primarily to give a finished appearance to the binding."

- **Engraving** (noun): "A method of cutting or incising a design into a material, usually metal, with a sharp tool called a graver." (Verb: *engrave*; Adjective: *engraved*)

- **Flyleaf** (noun): "A blank leaf (or leaves) inserted during the binding process between the free end paper and the beginning or end of the printed pages."
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- **Frontispiece** (noun): "An illustration or plate inserted immediately in front of the title page, with the illustration facing the title page, often abbreviated as frontis."
- **Imprint** (noun): "The publication data located at the base of a title page, usually includes the city of publication, name of the publisher (sometimes the printer), and the year of publication. Sometimes this information is located in a colophon at the back of a book. *Imprint* can also be used to refer to a printed piece from a certain location or period of time, i.e. *the university has a collection of 18th century Massachusetts imprints.*"
- **Imprint** (verb): "[To mechanically] impress or stamp (a mark or outline) on a surface or body." (Adjective: *imprinted*)
- **Inscribe** (verb): "To mark as with letters or numbers, often a short label, as an artist might formally mark his name, a title, the year, a dedication, etc. Such a label can be called an *inscription.*"
- **Inscribed** (adjective): "A book, or other printed piece, with a handwritten and signed statement usually written for a specific named person(s) and often located on the end paper or title page; when 'inscribed' is used to describe a book, unless otherwise stated, it is implied that the author has written the inscription. When used to designate the recipients of a book as a gift from the author (or publisher), it is called a 'presentation inscription.'"
- **Plate** (noun): "An illustration(s) printed on a separate sheet of paper (usually heavy and better quality than the text pages) and added to the book during the binding process."
- **Print** (noun): "The text appearing in a book, newspaper, or other printed publication."
- **Print** (verb): (1) "[To] produce (books, newspapers, magazines, etc.), especially in large quantities, by a mechanical process involving the transfer of text, images, or designs to paper." (Adjective: *printed*) (2) "Write (text) clearly without joining the letters: *print your name and address on the back of the check.*"
- **Recto** (noun): "The front side of any work on paper. May also be the right-hand page of a book. The opposite of verso. The front and rear sides of other two-sided objects, such as coins, medals, or panels which have a painting on each side are more often referred to as obverse and reverse."
- **Script** (noun): "Handwriting as distinct from [printed type]; written characters: *her neat, tidy script . . ." writing using a particular alphabet: *Russian script.*" Note: The term *script* includes both cursive and printed writing.
- **Stamp** (noun): "An instrument for stamping a pattern or mark, in particular an engraved or inked block or die."
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- **Stamp** (verb): "To imprint with a mark, design, or seal; or the device used to do so." (Adjective: *stamped*)
- **Type*** (noun): "[Mechanically] printed characters or letters." (Verb: *type*; Adjective: *typed*)
- **Verso** (noun): "The second or back side of any work on paper. May also be the left-hand page of a book. The opposite of recto."
- **Wrappers** (noun): "Abbreviated as 'wraps', wrappers are the paper covers of a pamphlet, often of a paper of heavier weight than the text paper; when you see 'wrappers' you know the item is not a hard bound book, but is instead a pamphlet or magazine with paper covers; usually not used to refer to 20th century paperback books which are called 'soft bound' (with paper covers)."

**Sources:**
*Antiquarian Booksellers' Association of America, [http://hq.abaa.org/books/antiquarian/abaapages/glossary](http://hq.abaa.org/books/antiquarian/abaapages/glossary);
A.2 Physical Description Field

The following terms have meanings specific to their use in the Physical Description field. These definitions are provided to clarify what the terms mean when used in this context.

- **Carrier**: "A physical medium in which data, sound, images, etc., are stored. For certain types of resources, the carrier may consist of a storage medium (e.g., tape, film) sometimes encased in a plastic, metal, etc., housing (e.g., cassette, cartridge) that is an integral part of the resource."
- **Carrier type**: "A categorization reflecting the format of the storage medium and housing of a carrier in combination with the type of intermediation device required to view, play, run, etc., the content of a resource."
- **Container**: "Housing that is physically separable from the resource being housed (e.g., a box for a disc or videocassette, a sleeve for a videodisc)."
- **Leaf**: "A unit of extent of text consisting of a single bound or fastened sheet of paper as a subunit of a volume; each leaf consists of two pages, one on each side, either or both of which may be blank."
- **Page**: "A unit of extent of text consisting of a single side of a leaf."
- **Portfolio**: "A unit of extent of text that is a container for holding loose materials (e.g., paintings, drawings, papers, unbound sections of a book, and similar materials) usually consisting of two covers joined together at the back."
- **Sheet**: "A flat piece of thin material (paper, plastic, etc.)."
- **Stereograph card**: "A card bearing stereographic images."
- **Subunit**: "A physical or logical subdivision of a unit (e.g., a page of a volume, a frame of a microfiche, a record in a digital file)."
- **Unit**: "A physical or logical constituent of a resource (e.g., a volume, audiocassette, film reel, a map, a digital file)."
- **Volume**: "One or more sheets bound or fastened together to form a single unit."

A.3 Form/Genre Field

The following commonly-used terms have specific meanings when used as form/genre terms. When in doubt, refer to the scope notes provided below to ensure that a term is appropriate for the resource being described.

- **Aerial photographs**: "Photographs taken from an air-borne vehicle within the earth's atmosphere, such as an airplane, balloon, or kite; from a camera strapped to a bird; or by a person, such as a parachutist, in flight." **BT**: Aerial views; Photographs.
- **Album covers**: "Containers for sound recordings; printed with graphic designs." **BT**: Covers (Illustration). **Note**: Use the term *Photograph album covers* for the covers of photograph albums. *Album covers* was earlier used to refer to "covers forming the binding or outer enclosure of an album, including detached covers." This is superseded by the term *Photograph album covers*.
- **Albumen prints**: "Predominant paper print photographic process in the 1800s; popular 1850s-1890s."
- **Albums**: "Bound or loose-leaf sets of pages. Includes handmade albums and published volumes of blank pages designed for the addition of images or keepsakes." **NT**: Photograph albums; Scrapbooks; Sketchbooks. **Note**: The terms *Albums* and *Books* are not synonymous—the appropriate form/genre term for any given resource will be *either* Albums or Books.
- **Ambrotypes**: "Direct-image photographs; the chemically reduced collodion glass negative packaged against a dark background appears as a positive. Commonly in a case; popular mid-1850s to mid-1860s." **BT**: Photographs.
- **Bird's-eye view prints**: "Bird's-eye views of cities and towns that are lithographs, engravings, or other types of prints including photomechanical ones. Popular in the United States 1870-1910s, but also made earlier." **BT**: Bird's-eye views; Prints. **RT**: Cityscape prints. **Note**: Use the term *Bird's-eye views* for bird's-eye view photographs.
- **Bird's-eye views**: "Graphic representations of scenes portrayed as if viewed from above at an oblique angle. If of a city or town, not generally drawn strictly to scale, they show street patterns, individual buildings, and major landscape features in perspective." **BT**: Views. **NT**: Bird's-eye view prints. **RT**: Aerial views; Maps; Panoramic views.
- **Book covers**: "Covers forming the binding or outer enclosure of a hardback or paperback book. Includes detached covers." **BT**: Covers (Illustration).
• **Book illustrations:** "Illustrations in books or pamphlets, whether photographs, photomechanical prints, or other media; whether still part of or detached from the volume. Also, drawings, photographs, prints, and other pictures made to be reproduced as illustrations, whether or not they were ever published." **BT:** Illustrations.

• **Books:** "Published non-periodical volumes in bound codex form, usually with 49 or more pages." **RT:** Leaflets; Pamphlets. **Note:** The terms *Albums* and *Books* are not synonymous—the appropriate form/genre term for any given resource will be *either* Albums or Books.

• **Boudoir card photographs:** "Card photographs; mounts measure approximately 8.5 x 5.5 in. (22 x 14 cm.). Introduced in the United States ca. 1890." **BT:** Card photographs.

• **Broadsides:** "Single-sheet public notices that are usually printed on only one side. They provide information, commentary, proclamation, or other announcement or advertisement. Primarily posted but also distributed by hand. They are usually less pictorial than posters and have more extensive text than signs." **BT:** Ephemera.

• **Cabinet photographs:** "Card photographs; mounts measure approximately 6.5 x 4.25 in. (16.5 x 10.5 cm.). Introduced in the United States in 1866; popular until ca. 1900." **BT:** Card photographs.

• **Card photographs:** "Paper photographic prints made by a variety of processes on commercially produced cardboard mounts of standard sizes (with some variation). Introduced in the 1850s. This term includes negatives and unmounted photographic prints intended for such standard mounts. Often portraits." **BT:** Photographs. **NT:** Boudoir card photographs; Cabinet photographs; Cartes de visite. **RT:** Photographic prints; Stereographs.

• **Cartes de visite:** "Card photographs; mounts measure approximately 4 x 2.5 in. (10 x 6 cm.). Introduced in the United States in 1859; made into the 1900s." **BT:** Card photographs.

• **Cityscapes:** "General or broad views of cities and towns or sections of them. Usually made from an elevated or distant vantage point, such as a view from a roof or a view of a skyline." **NT:** Cityscape photographs.

• **Collotypes:** "Photomechanical prints introduced commercially in the 1860s; commonly used in book illustration; can be difficult to distinguish from actual photographs." **BT:** Photomechanical prints.

• **Covers (Illustration):** "Illustrations and original designs for the covers of books, periodicals, pamphlets, and other graphic design works." **NT:** Album covers; Book covers; Magazine covers. **RT:** Illustrations; Sheet music covers.
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- **Cyanotypes:** "Blue photographic prints employing light-sensitive iron salts, most commonly on paper; introduced in the 1840s but not in general use until after 1880; often used as proofs." **BT:** Photographic prints. **NT:** Blueprints.

- **Daguerreotypes:** "Direct-image photographs on silver-coated copper; introduced in 1839 and in general use until ca. 1860; distinctive mirror-like surface; commonly in a case." **BT:** Photographs.

- **Ephemera:** "Transient everyday items, usually printed and on paper, that are manufactured for a specific limited use, then often discarded. Includes everyday items that are meant to be saved, at least for a while, such as KEEPSAKES and STOCK CERTIFICATES." **NT:** Advertisements; Broadsides; Fliers (Printed matter); Forms (Documents); Invitations; Money; Scrapbooks; Viewbooks; Posters.

- **Film negatives:** "Negatives on a flexible base, such as celluloid or polyester. Introduced commercially in the 1880s." **BT:** Negatives.

- **Film stills:** "Still images made during the production of a motion picture that show scenes from the movie; usually for publicity purposes." **BT:** Photographs. **RT:** Publicity photographs.

- **Frontispieces:** "Illustrations placed next to the title page." **BT:** Illustrations.

- **Genre works:** "Scenes or incidents of everyday life, such as domestic interiors or rural and village scenes; tableaux; chiefly pre-1900." **NT:** Genre photographs.

- **Group portraits:** "Portraits in which two or more people are shown. Includes groups assembled through photomontage, combination printing techniques, or an artist's imagination." **BT:** Portraits.

- **Illustrations:** "Images that explain or elaborate a written or spoken text; may be issued separately from the text. Published and unpublished illustrations are included, as are pictures made in one medium to be published as illustrations in a different medium." **BT:** Pictures. **NT:** Book illustrations; Frontispieces; Periodical illustrations. **RT:** Covers (Illustration).

- **Landscapes (Representations):** "General or broad views of natural scenery, including inland bodies of water; may also include figures or man-made objects, but these are of secondary importance to the composition. Usually made from an elevated or distant vantage point, such as a view from a hill; not ground level close-up view of, for example, a tree." **NT:** Landscape photographs.

- **Leaflets:** "Unbound volumes with fewer than five pages." **RT:** Books; Fliers (Printed matter); Pamphlets.

- **Marines (Visual works):** "Works depicting scenes having to do with ships, shipbuilding, or harbors." **BT:** Views. **NT:** Marine photographs. **RT:** Landscapes (Representations); Panoramic views; Seascapes.
Negatives: "Photographs in which the tonal values are the opposite of those in the subject to which the negative was exposed. Their purpose is to be a matrix for obtaining multiple positive images of the subject."

BT: Photographs. NT: Film negatives; Glass negatives; Paper negatives.

Pamphlets: "Published non-periodical volumes with no cover or with a paper cover. Usually 5 or more pages and fewer than 49 pages." NT: Pressbooks. RT: Books; Leaflets.

Panoramic photographs: "Photographs which are a continuous view of a wider section of the horizon than could normally be photographed in a single exposure; ratio of width to height is usually 2:1 or more. May be separate photographs either joined (or meant to be joined) together or one long piece made with a special camera." BT: Panoramic views; Photographs.

Panoramic views: "Views that cover more area than usually can be seen in a single glance." NT: Panoramic photographs; Panoramic postcards. RT: Aerial views; Bird’s-eye views; Landscapes (Representations); Marines (Visual works); Seascapes.

Photograph album covers: Covers forming the binding or outer enclosure of a photograph album, including detached covers. Note: This is a non-TGM, authorized CUL Digital Collections form/genre term.

Photograph albums: "Albums specially designed to hold photographs or albums containing photographs. Both empty and filled albums are included." BT: Albums. NT: Card photograph albums.

Photograph cases: "Decorative containers for one or several photographs. Primarily made from 1840s-1860s, usually of leather, paper-covered wood, gutta percha, or thermoplastic material; mostly for ambrotypes and daguerreotypes." BT: Packaging. NT: Union cases.

Photographic postcards: "Postcards that are photographs. Kodak introduced a sensitized postcard-size stock with standard postcard information printed on the back in 1902. The format remained popular through about 1920, and is still available. Commercial names include Velox and Azo (from Kodak) and Cyko (from Ansco)." BT: Photographic prints; Postcards.

Photographic prints: "Photographs produced from negatives, by transfer photo processes, or, in the case of photograms, by the direct action of light on light-sensitive paper. Tonal values are usually the same as those of the subject shown. Do not confuse with continuous tone photomechanical prints, such as COLLOTYPES and WOODBURYTYPES." BT: Photographs. NT: Cyanotypes; Gelatin silver prints; Negative prints; Photographic postcards. RT: Card photographs; Photomechanical prints.
Photographically illustrated books: Books that are illustrated with photographs. Note: This is a non-TGM, authorized CUL Digital Collections form/genre term.

Photographs: "The word Photographs is a general designation for any photographic process." NT: Aerial photographs; Ambrotypes; Card photographs; Cityscape photographs; Daguerreotypes; Film stills; Genre photographs; Landscape photographs; Marine photographs; Negatives; Panoramic photographs; Photographic prints; Portrait photographs; Seascape photographs; Tintypes. RT: Stereographs. CN: "Whenever possible, use a more specific term. The basic narrower terms are Ambrotypes, Daguerreotypes, Negatives, Photographic prints, and Tintypes. When using a genre term that includes the word Photographs, also index under a more specific physical process name, if desired."

Photogravures: "Prints that faithfully imitate photographs or other continuous tone originals. Hand-pulled prints from plates with an aquatint grain have an irregular pattern of dotting; prints from screened gravure plates have a regular pattern of dots but, unlike halftone prints, ink varies in density. Introduced in 1879." BT: Photomechanical prints.

Photomechanical prints: "Prints made from photographically prepared printing surfaces. Most have a distinctive dot or screen pattern, but some are continuous tone. Usually planographic." BT: Prints. NT: Collotypes; Photocopies; Photogravures. RT: Photographic prints; Stereographs.

Portraits: "Graphic representations, especially of the face, of real persons, usually posed, living or dead. Pictures whose purpose is the portrayal of an individual or several people, not pictures that merely include people as part of an event or scene." NT: Group portraits; Portrait photographs; Self-portraits.

Postcards: "Cards on which a message may be written or printed for mailing without an envelope; often include a pictorial, comic, or other scene on one side." BT: Cards. NT: Photographic postcards; Panoramic postcards. RT: Stationery; Viewbooks.

Prints: "Images formed by transfer from one surface or source to another. Usually created with ink(s) and produced in multiple impressions." BT: Pictures. NT: Bird's-eye view prints; Cityscape prints; Genre prints; Landscape prints; Marine prints; Photomechanical prints; Portrait prints. CN: "When using a genre term that includes the word PRINTS, also index under a more specific process name, if desired. The basic narrower terms are INTAGLIO PRINTS, PHOTOMECHANICAL PRINTS, PLANOGRAPHIC PRINTS, and RELIEF PRINTS." Note: In this context, the term Prints does not refer to photographs or photographic prints.
Seascapes: "Works depicting the ocean or other large body of water where the water itself dominates the scene." BT: Views. NT: Seascape photographs. RT: Landscapes (Representations); Marines (Visual works); Panoramic views.

Stereographs: "Two nearly identical photographs or photomechanical prints, paired to produce the illusion of a single three-dimensional image; usually viewed with a stereoscope. Typically, photographic prints on card mounts, but may be daguerreotypes, glass negatives, or other processes. Card mounts commonly 3.5 x 7 in. (9 x 18 cm.) up to 5 x 7 in. (12 x 18 cm.). Popular in the United States 1859-1920s." RT: Card photographs; Photographs; Photomechanical prints. CN: "Use even if only half of the stereograph is present. As desired, also index under the type of process, such as DAGUERREOTYPES."

Tintypes: "Direct-image photographs in which the collodion negative supported by a dark-lacquered thin iron sheet appears as a positive image. Popular mid-1850s through 1860s; in use through 1930s." BT: Photographs.

Title pages: "Pages bearing the title and usually the names of author and publisher, and date and place of publication of a book, portfolio, or other material." NT: Music title pages. RT: Illustrations.

Union cases: "Thermoplastic cases introduced in the United States in 1852 for daguerreotypes and also made for ambrotypes and some tintypes through the 1860s. Almost 800 design motifs have been recorded. Often mistakenly referred to as gutta-percha cases." BT: Photograph cases.

Viewbooks: "Published booklets and other volumes primarily consisting of views of particular places, events, and activities. May be photographs, photomechanical prints, or postcards; may be connected by accordion folds." BT: Ephemera. RT: Postcards; Views.

Views: "Depictions, in any media, usually of places and structures, made from a certain distance, and not necessarily intended to produce detailed information. Distinct from other information such as diagrams, working drawings, maps, and plans. A topographical image, showing a general aspect of a place." NT: Aerial views; Bird's-eye views; Cityscapes; Landscapes (Representations); Marines (Visual works); Panoramic views; Seascapes. CN: "Use when a more specific type of view is not appropriate."