METADATA STANDARDS AND

CATALOGUING GUIDELINES

Table of Contents

METADATA STANDARDS

The numbered recommendations below are the outcome of a series of discussions with partners and the system designers undertaken in October and November 2001. They are also the result of revisions made in October 2002 based on examples of metadata received. In 2001 Jone Garmendia and Meg Sweet visited a number of partners whose contributions to the project are particularly substantial and went through with them a questionnaire designed to elicit information both about their local cataloguing practice and their requirements for the Moving Here catalogue. In 2002 Helen Wood subsequently revised the guidelines based on evidence of partners' contributions and the development of the project. They also reflect the use of different templates by partners.

The resulting recommendations attempt to bring very different expectations into a coherent whole which, inevitably, does not exactly match any single institution's response but does not, either, fly in the face of any articulated need. It is interesting to note that partners come from a number of domains with anything from complete cataloguing of holdings to no cataloguing yet undertaken and with anything from highly complex, authority controlled cataloguing to the most minimal. It is hardly surprising that the one and only data element all those consulted agreed upon was 'date'.

It is not expected that metadata already sent will have to be altered by partners in accordance with the revised guidelines of 2002. This will be edited by the central team. However, contributions from now on should take these changes on board in order to facilitate transfer of data to the system.

In reviewing the recommendations partners were asked to note the following:

1. The recommendations are an attempt at pragmatism, making mandatory as few data elements as sit comfortably with coherence and accessibility for the public and manageable for those partners who are starting from scratch.

2. That all other data elements that partners requested are available and will be encompassed in the main search. Searching over all the data elements to ensure differences between cataloguing practices do not disadvantage one partner's material as against another is an absolute requirement.

3. That the establishment and maintenance of an agreed thesaurus and controlled vocabulary for subjects and authority terms for people, corporate bodies and places is not considered feasible in the lifetime and resource constraints of the project. Partners are, however, encouraged to follow their own rules where these exist.

4. That what is being described in the catalogue is the original, not its digital rendering.

METADATA RECOMMENDATIONS

1. That the catalogue be as flat as possible. In practice this means just one level of description in most instances but with the provision of a second level when both something which is a container (a file, volume or whole audio tape) and that which it contains (separate documents, pages, sections of tape) need to be described.

2. That the Dublin Core metadata elements be available:
   a. Title
   b. Creator
   c. Subject
   d. Description
   e. Publisher
   f. Contributor
   g. Date
   h. Type (Community and Theme)
   i. Format
   j. Identifier
   k. Source
   l. Language
   m. Relation
   n. Coverage
   o. Rights

3. That additional elements be made available, comprising
   a. Person (as subject)
   b. Access restrictions
   c. Biography/history/additional information
   d. Physical description

4. That the following elements be mandatory:
   a. Identifier
   b. Title OR Description, according to local practice
   c. Date (start date)
   d. Community
   e. Theme
   f. Source (meaning location of original/contributing partner)
   g. Format (text as default value)
   h. Rights
   i. Access (default value at batch level to suit the needs of each partner)

5. That date be searchable as a single date or as a range. The catalogue will display a start and end date but only start date will be mandatory. If there is only a start date the system will automatically populate the end date with the start date.

6. That Community be provided with a drop down list of the 4 key communities and be labeled as 'community' with searches being limited, if required, to the key community selected.

7. That Theme be provided with a drop down list of the 4 key themes (origins, moving, settling and connecting (i.e. reconnecting with the country of origin)) and be labeled as 'theme' with searches being limited, if required, to the key theme selected.

8. That source be provided with a drop down list of all the contributing bodies with searches being limited, if required, to the contributing body selected.

9. That the search option should be carried out by the user typing in a keyword or phrase or words and phrases controlled by Boolean operators (AND, OR, NOT) and with the options of wildcarding and stemming, with the system searching across the text of all data elements except date, type source and format.

10. That personal names may be entered for Creator, Contributor, Person (as subject) or within the Title and Description elements. Users will be able to specify that they are searching for a person and in retrieving hits the system will give priority to matches from the Creator, Contributor and Person data elements.

11. That the search be refinable, if desired, by date(s) and/or type (key community or key theme) and/or source and/or format.

12. That the search options should be presented in the order:

    a. Keyword and Catalogue Reference (Go to ID)
    b. Tick box to specify if the search is for a person
    c. Key community
    d. Key theme
    e. Dates
    f. Source (Where held)
    g. Format (text, image, object, audio, film)
    h. Search for catalogue resources only
    i. Search for learning resources only
    j. Search for stories only

13. That the individual catalogue entry screen should be presented in the order:

    a. Identifier
    b. Title (if chosen)
    c. Description (if chosen)
    d. Dates
    e. Community
    f. Theme
    g. Source
    h. Access
    i. Rights
    j. Other data elements

14. That there should be a prominent link from parent to child (file to individual document etc) from child to sibling and from child back to parent.

15. That where a search results in more than one hit a hit list be presented with identifier, 1st few words of title/description, date(s) and format displaying for each hit, and with each hit linkable to its full entry, with navigation back to the hit list also provided.

16. That the hit list be sorted by community (alphabetically) and by date. A link to the hits for each community will be displayed on top to aid navigation. If there are no hits for a community no link will be displayed.

17. That, bearing in mind the impossibility within existing timeframe and resources of agreeing and maintaining authority files and one thesaurus for the whole project, contributors be encouraged to concentrate cataloguing effort on title/description, ensuring key words are incorporated there. Generally richness of description will be centred on the title/description elements. Contributors may additionally fill in elements such as subject, creator and coverage (place), using their own descriptive/indexing standards. Effort will not be wasted as all fields will be searched

18. That in the interests of user friendliness elements, if labeled, be given human understandable names (e.g. 'where held?' for 'source'; 'place' for 'coverage').

19. That allowance is made for those elements which are textual to contain c4,000 characters.

20. That a simple XML schema be written for the project, allowing import of data from existing systems and/or the use of a special editing template to feed data into the system.

21. That a separate screen of information about each contributor be provided, linkable from 'source' in each catalogue entry.

22. That full navigation within the catalogue (search, hits, entry, child entry) up, down and across be provided, together with navigation to and from the other parts of the system (learning resource, stories, contributors' screens, images).

23. That the same metadata standards will be used to describe stories and learning resources.

24. That a brief cataloguing rules document be written to help partners to provide the relevant data under the relevant Dublin Core elements.

ELEMENT LABELS

Element	Label
Title	Title
Creator	Creator
Subject	Subject
Person (as subject)	**Person**
Description	Description
Publisher	Publisher
Contributor	Contributor
Date	Date
Community	**Community**
Theme	**Theme**
Format	Format
Identifier	**Catalogue Reference**
Source	**Where held?**
Language	Language
Relation	**See also**
Coverage	**Place**
Rights	Rights
Access restrictions	**Access**
Biography/history/additional information	**Additional Information**
Physical description	Physical Description

The attached Cataloguing Guidelines use the more user-friendly terms adopted as labels. The 20 metadata elements have been arranged in a slightly different order to facilitate data entry work for partners using the XML template.

CATALOGUING GUIDELINES

Using the Guidelines

The Guidelines themselves comprise a list of all the metadata elements followed by a detailed individual description of each element with reference to specific cataloguing guidance and practical examples.

Metadata elements are named by their more user-friendly labels and refer to descriptive metadata (as opposed to technical metadata for the digital images).

Terminology

Metadata is, in basic terms, data about data. Other terms associated with metadata elements are: elements of description, data elements, catalogue elements, catalogue fields.

Metadata elements may be mandatory or optional.

Mandatory data must be provided for all catalogue entries by all the Moving Here partners.

Optional elements may be left blank. It is highly unlikely that all the elements will be used at once. They are available to allow for eventualities and suit the needs and cataloguing practice of a wide-range of partner institutions.

We have limited the number of mandatory elements to 9 elements of description:

     a. Catalogue Reference
     b. Title OR Description, according to local practice
     c. Date (start date)
     d. Community
     e. Theme
     f. Where held? (meaning location of original/contributing partner)
     g. Format (*text* as default value)
     h. Rights ("Copyright *partner*" is be the default value except for the PRO)
     i. Access ("Available for consultation at *partner*" is to be the default value)

Some of the optional elements may be key or even mandatory in some partners' catalogues (e.g. Creator, Place). Metadata for optional elements is very welcome.

Levels of Description

As per the metadata standards the recommendation is to carry out flat cataloguing work. Documents, files, objects, photographs and other images should be described individually (as far as possible). Any relevant contextual information (collection or series level data) can be provided at the beginning of the title or description elements. Detailed information about certain components of a file can be entered under the description element. See the cataloguing rules for Title and Description for further information.

A section on two-level cataloguing is available at the end of the guidelines for each metadata element.

List of metadata elements	Mandatory elements
1. Catalogue reference	✓
2. Title	✓ (or Description)
3. Creator	
4. Description	✓ (or Title)
5. Subject	
6. Person	
7. Place	
8. Date	✓
9. Publisher	
10. Contributor	
11. Community	✓
12. Theme	✓
13. Format	✓
14. Physical Description	
15. Where held?	✓
16. Language	
17. See also	
18. Rights	✓
19. Access	✓
20. Additional Information	

METADATA ELEMENT: **CATALOGUE REFERENCE**

Definition:

The unique identifier assigned to the item being described.

Mandatory or Optional:

MANDATORY

Rule(s)

The catalogue reference for Moving Here must be the same as the identifier, catalogue reference, shelf mark, accession/acquisition number or object number used at source.

It may be an alphanumeric string made up of different sequences or codes separated by slashes, spaces or colons.

When dealing with two-level cataloguing a record and all its sub-records must have a unique identifier.

Examples
MEPO 3/1743
L/MIL/17/5/4321
PP Hin F62
V/27/262/1
T 91/187a

Field type in the Moving Here Website
Free-text (max. 250 characters).

METADATA ELEMENT: **TITLE**

Definition:

The name given to the unit of description. This should take a form covered by the standard or convention used by the archive, library or museum for text, images, objects or audiovisual materials.

Mandatory or optional:

ACCORDING TO LOCAL PRACTICE EITHER TITLE OR DESCRIPTION IS MANDATORY.

Rule(s):

This element should be used for items which have a formal or given title. This will most commonly be that of a report, publication, biography, painting, art object, oral history or film title.

According to local cataloguing practice, this element can also be used for longer descriptive information than a formal title.

Some contextual information may also be included with the Title or Description elements. For example, where it is necessary to reflect that only a few items from a file have been selected include the title of the whole file together with a description of the individual items selected, thus combining series and file level information.

Examples:

The English diary of an Indian student

Grant application for Asian Arts: progress reports from Asian Arts events organisers

Memorandum on…

Caribbean Reflections. Memories of island life

Jamaica Guardian

Dyche Collection. Portrait of…

Field type in the Moving Here Website

Free text (max. 4,000 characters)

METADATA ELEMENT: **CREATOR**

Definition:

The Creator name(s) identifies the individual or organisation responsible for creating, making, originating or producing the item being described.

It covers the artist, producer, cultural group, corporate body or other entity originating the item.

Mandatory or optional:

OPTIONAL

Rule(s):

Name the individual(s) or entity(ies) responsible for the creation of the unit of description.

Natural language (first name followed by surname) should be used in order to make the Moving Here catalogue more user-friendly for its web audience.

Verify Creator names as per the standard or convention used by your archive, library or museum (some partners maintain lists of personal and corporate names).

For users of the XML template: when selecting multiple creators, a separate label for each creator will be used:

<creator>Greater London Council</creator>
<creator>Indian Workers Association</creator>

For users of the Word, Access and Excel templates: when selecting multiple creators these should be entered in the same row/field separated by a comma but NOT a carriage return.

Greater London Council, Indian Workers Association

Examples of individual creator terms:

Purshotam Lal Bansal

Yorkshire Council for Social Service

Federation of Ukrainian Jews

Bengali Mahila Samity (Bengali Women's Organisation)

Royal Worcester

Field type in the Moving Here Website

Free text (max. 500 characters)

METADATA ELEMENT: **DESCRIPTION**

Definition:

An account of the content of the item being catalogued. The content description is a statement about the subject matter of the item.

It is, therefore, the main statement of what the material is and what it relates to (often including subjects, people and places). The content description enables users to make an informed decision about whether they want to investigate the material further or not.

Mandatory or optional:

ACCORDING TO LOCAL PRACTICE EITHER DESCRIPTION OR TITLE IS MANDATORY.

Rule(s):

If your are not providing Title data, make sure that any appropriate title or object name appears at the beginning of the Description element.   In some cases contextual information (e.g. series or collection level data) will also be included in this first statement.

The first statement is then followed by a terse narrative note describing all the key elements of the item. Ideally, this text should be succinct whilst also providing specific details about the topic. Highlight the relevance of the item to Moving Here or the migration experience. Remember to include reference to all relevant subjects, persons or places if you are not providing data for these three elements separately.

Dates referred to in the Description element should not be the creation date of the item. They should instead refer to other events relevant to the narrative.

Make reference to attachments or parts when cataloguing larger items (e.g. files). In this case, the content narrative may describe several parts globally (when of a similar nature) or individually (with separate brief statements which could start with the word 'Contains…').

Inscriptions and transcriptions of relevant foreign language text should also appear under Description.

If you are describing audio-visual material which has text appearing on the screen describing the content of that item, then you can include a transcription of that text here. Attribute this text as a transcription taken directly from the source.

It is particularly important that the description is unambiguous and not in any way defamatory or offensive.

Check descriptive data for spelling mistakes. Avoid the use of acronyms as far as possible (and avoid punctuation in acronyms; e.g. HMS Tempest instead of H.M.S. Tempest).

This element does not cover the physical description of objects, photographs or other items as a separate metadata element exists for this purpose.

Examples:

Kosher menu cards from the 'Sireen'. Complete set of menus for the week commencing 14 March 1930. The menus illustrate the Jewish experience on board when traveling from Kovno to Hull. Signed by Chef Simon Abelov. [*If the menus were in yiddish an English transcription or summary transcription could follow*].

Board of Trade: Passenger list for the Fortune, having embarked at Kingston (Jamaica) and called at Aruba on route to Liverpool. Disembarked at Liverpool on 1 January 1948.

Mera uddesya / Kumari Vinadas Das. Statement by the student on why she shot Sir Stanley Jackson, the Governor of Bengal, during a convocation ceremony at Calcutta University on 31 December 1930.

The Zadie doll designed and produced in Wandsworth by Zadie Wilkins. An African / Caribbean Doll designed to be the first of a range of multi-ethnic toys to appeal to all races.

Photograph of Russian forebears of Mrs Rita Bennett of Liverpool, nee Rita Adleman, formerly Rita Abelov.

Dyche Collection. Portrait of… depicting…etc.

Field type in the Moving Here Website

Free text (max. 4,000 characters)

METADATA ELEMENT: **SUBJECT**

Definition:

The subject term(s) or phrase which are significant to, relevant to, or which summarise the topic of the item being described.

Mandatory or optional:

OPTIONAL

Rule(s):

According to local practice provide key subject terms as per the standard or convention used by your archive, library or museum (some partners maintain lists of subject terms or keywords).

The establishment and maintenance of an agreed thesaurus and controlled vocabulary for subjects is not considered feasible in the lifetime and resource constraints of the project. Partners are, however, encouraged to follow their own rules.

For users of the XML template: when selecting multiple subjects, a separate label for each subject will be used:

<subject>famine</subject>
<subject>children</subject>
<subject>taxation</subject>

For users of the Word, Access and Excel templates: when selecting multiple subjects these should be entered in the same row/field separated by a comma but NOT a carriage return.

famine, children, taxation

Examples of individual subject terms:

Famine

Suffragettes

Racism

Salt laws

Festivals

Schools

Religion

Field type in the Moving Here Website

Free text (max. 500 characters)

Festivals

METADATA ELEMENT: **PERSON**

Definition:

Personal names as subject matter significant or relevant to the item being described.

Mandatory or optional:

OPTIONAL

Rule(s):

If you are not providing data for this optional element, make sure that all relevant names are included in the Description element.

According to local practice provide key personal names as per the standard or convention used by your archive, library or museum (some partners maintain lists of personal names).

The establishment and maintenance of an agreed thesaurus and controlled vocabulary for personal names is not considered feasible in the lifetime and resource constraints of the project. Partners are, however, encouraged to follow their own rules.

Natural language (first name followed by surname) should be used in order to make the Moving Here catalogue more user-friendly for its web audience.

For users of the XML template: when selecting multiple persons, a separate label for each person will be used:

<person>Vinayak Damodar Savarkar</person>
<person> John Archer, Mayor of Battersea</person>

For users of the Word, Access and Excel templates: when selecting multiple persons these should be entered in the same row/field separated by a comma but NOT a carriage return. Where a person has a title leave a space in between the name and the title.

John Archer Mayor of Battersea, Vinayak Damodar Sayarkar

Examples of individual person terms:

Vinayak Damodar Savarkar

John Archer, Mayor of Battersea

Abraham Mundy

Sir Learie Constantine

19

Field type in the Moving Here Website

Free text (max. 250 characters)

METADATA ELEMENT: **PLACE**

Definition

The name(s) of place(s) significant or relevant to the item being described.

They may refer to a place as subject matter, production place or associated place (e.g. place where a relevant event occurred).

Mandatory or optional:

OPTIONAL

Rule(s):

If you are not providing data for this optional element, make sure that all relevant places are included in the Description element.

According to local practice provide key place names as per the standard or convention used by your archive, library or museum (some partners maintain lists of place names).

The establishment and maintenance of an agreed thesaurus and controlled vocabulary for place names is not considered feasible in the lifetime and resource constraints of the project. Partners are, however, encouraged to follow their own rules.

Avoid place names that are too general in the context of Moving Here. For example, avoid terms such as 'Caribbean', 'South Asia', 'Eastern Europe' or 'United Kingdom'.

It is recommended to select a specific place name (e.g. 'Morant Bay') followed by a more general place name for the region, island and country (e.g. 'Jamaica'). This could be described as a 3-level approach stating the specific geographical area followed by the general area and the country name. In some cases only specific place and country (or region and country) will appear.

It is recommended to use the current country names (e.g. Sri Lanka instead of Ceylon).

Ideally, when an item refers to a place using a former name, select both the former and the current geographical term (e.g. 'Kovno' and 'Kaunas').

For users of the XML template: as place is a repeatable element, when selecting multiple places, a separate label for each place will be used:

<place>Amritsar</place>
<place>Punjab</place>
<place>India</place>

For users of the Word, Access and Excel templates: when selecting multiple places these should be entered in the same row/field separated by a comma but NOT a carriage return.

Amritsar, Punjab, India

Examples of individual place terms:

Amritsar	Wandsworth	Morant Bay
Punjab	London	Jamaica
India	England	
Kovno	Killarney	
Kaunas	Kerry	
Lithuania	Ireland	

Field type in the Moving Here Website

Free text (max. 250 characters)

METADATA ELEMENT: **DATE**

Definition:

Identifies and records the date(s) of creation of the item being described.

Mandatory or optional:

MANDATORY

Rule(s):

Provide the date of the creation of the original item as a single calendar date using up to 8 numeric characters without spaces, forward slashes or hyphens. Enter the year digits first, followed by the month and the day (when available).

Use any of the following date formats:
YYYY
YYYYMM
YYYYMMDD

When necessary, a range of dates (start date and end date) can be provided following the above formats.

For example, YYYYMMDD - YYYYMMDD

Covering dates should be in the form of the first date and last date, even if the bulk of the records (e.g. in a file) are within a certain period with only a few records of earlier or later date. If significant, reference to this may be made under Description

If there is any doubt as to the precise year, use a wide range of covering dates. For example if only an estimation of the decades can be made, such as late 19th century early 20th century, this would perhaps be represented as 1870 – 1930.

End date information is not mandatory. However, if no end date is entered the system will replicate the start date for the end date as a default setting.

For users of the XML template: a separate label for start and end date will be used. Use the start date for single creation dates. The end date label would then be left blank.

Individual advice on date conversion tools for exported data from existing catalogue systems will be provided to partners not using the XML template.

Examples:

Single date of document/file/object	**Single date format to be used for Moving Here**	Covering dates of document/file/object	**Covering date format to be used for Moving Here**
1920	**1920 (all templates)**	1920-1930	**\<startdate\>1920\</startdate\> \<enddate\>1930\</enddate\> XML template** **1920 – 1930 (Word, Access and Excel template)**
May 1920	**192005 (all templates)**	May 1920-Dec 1930	**\<startdate\>192005\</startdate\> \<enddate\>193012\</enddate\> XML template** **192005 – 193012 (Word, Access and Excel template)**
10 May 1920	**19200510 (all templates)**	10 May 1920-20 Dec 1930	**\<startdate\>19200510\</startdate\> \<enddate\>19301220\</enddate\> XML template** **19200510 – 19301220 (Word, Access and Excel template)**

Field type in the Moving Here Website
Numeric (maximum 8 numeric characters for start date and 8 characters for end date).

METADATA ELEMENT: **PUBLISHER**

Definition:

The person, organisation or entity responsible for the publication of the item.

It applies to published items.

Mandatory or optional:

OPTIONAL

Rule(s):

Name the relevant individual publisher(s), publishing company or organisation regardless of the media.

Place of publication can also be include in this field, provided it is combined with the publisher. For example BBC, Bristol

Natural language (first name followed by surname) should be used in order to make the Moving Here catalogue more user-friendly for its web audience.

Verify publisher names as per the standard or convention used by your archive, library or museum (some partners maintain lists of personal and corporate names).

For users of the XML template: when selecting multiple publishers, a separate label for each publisher will be used:

<publisher>BBC</publisher>
<publisher>Cambridge University Press</publisher>

For users of the Word, Access and Excel templates: when selecting multiple publishers these should be entered in the same row/field separated by a comma but NOT a carriage return.

BBC, Cambridge University Press

Examples of individual publisher terms:

Oxford University Press

BBC

Indian Workers Association, London

Field type in the Moving Here Website

Free text (max. 250 characters)

Indian Workers Association, London

METADATA ELEMENT: **CONTRIBUTOR**

Definition:

The person, organisation or entity responsible for making contributions to the content /to the item being described in a role other than creator, publisher or person as subject .

It may cover the commissioner of the item, a donor, sponsor, cultural group involved at some stage, etc.

Mandatory or optional:

OPTIONAL

Rule(s):

Name the individual(s) or organisation(s) who had a relevant contribution to the item.

Natural language (first name followed by surname) should be used in order to make the Moving Here catalogue more user-friendly for its web audience.

Verify contributor names as per the standard or convention used by your archive, library or museum (some partners maintain lists of personal and corporate names).

For users of the XML template: when selecting multiple contributors, a separate label for each contributor will be used:

<contributor>Andrew Jones</contributor>
<contributor>Wandsworth Youth Association</contributor>

For users of the Word, Access and Excel templates: when selecting multiple contributors these should be entered in the same row/field separated by a comma but NOT a carriage return.

Andrew Jones, Wandsworth Youth Association

Examples of individual contributor terms:

Andrew Jones

Wandsworth Youth Association

Transport and General Workers' Union

Field type in the Moving Here Website

Free text (max. 250 characters)

METADATA ELEMENT: **COMMUNITY**

Definition:

Identifies the key migrant community within the scope of the Moving Here Project.

Mandatory or optional:

MANDATORY

Rule(s):

It is recommended to select one community as the key theme relevant to the item being described. However, it is recognized that on occasion more than one community is represented (for example, in a file relating to overarching policies/initiatives for immigrants as a whole, or a photograph of an area particularly populated by two of the communities etc.). To achieve maximum points of access for users these should be included. Therefore, in order to cater for multi-community stories and learning resources it is technically possible to select more than one community (even all four if relevant) for catalogued items.

[Note: Users will only be able to search by one community at a time. However, they will now be able to guarantee that they select all the hits relevant to each community searched for when using this field because all information about community is concentrated here. These might not have been picked up previously if additional communities were entered in free text fields such as "additional information"].

Use one or a combination of the following terms:
Asian
Caribbean
Irish
Jewish

[Note: although the project's remit is South Asian people, for the purposes of the system the term "Asian" must be entered in the metadata. This is because no spaces are permitted between words in order for the information to load. The user however will search under and see the term 'South Asian' displayed on the site]

For users of the XML template: when selecting multiple themes, a separate label for each theme will be used. It will not accept misspellings of these words or communities other than the four listed:

    <community>Caribbean</community>
    <community>Irish</community>
    <community>Jewish</community.
    <community>Asian</community>

For users of the Word, Access and Excel templates: when selecting multiple communities these should be entered in the same row/field separated by a comma but NOT a carriage return.

Examples:

Asian

Caribbean, Asian

Irish, Jewish, Caribbean

Jewish, Irish

Asian, Caribbean, Jewish, Irish

Field type in the Moving Here Website

Free text (max. 250 characters)

METADATA ELEMENT: **THEME**

Definition:

Identifies the key theme within the scope of the Moving Here Project.

Mandatory or optional:

MANDATORY

Rule(s):

It is recommended to select only one theme as the key theme relevant to the item being described. However, it is recognized that on occasion more than one theme is represented and to present maximum points of access for users these should be included. Therefore, in order to cater for multi-themed stories and learning resources it is technically possible to select more than one theme for catalogued items.

The standard names for the 4 Moving Here themes are: Origins, Journeys, Settling and Connecting. Only one of these four themes or combinations of them should be selected.

For users of the XML template: when selecting multiple themes, a separate label for each theme will be used. It will not accept misspellings or themes other than the four listed:

    <theme>Origins</theme>
    <theme>Journeys</theme>
    <theme>Settling</theme>
    <theme>Connecting</theme>

For users of the Word, Access and Excel templates: when selecting multiple themes these should be entered in the same row/field separated by a comma but NOT a carriage return.

Examples:

Origins, Journeys, Settling

Journeys

Origins, Journeys, Settling, Connecting

Field type in the Moving Here Website

Free text (max. 250 characters)

METADATA ELEMENT: **FORMAT**

Definition:

Identifies the format or media type of the original item being described (not its digital representation in the Moving Here website).

Mandatory or optional:

MANDATORY

Rule(s):

Since the beginning of the project, the following broad formats have been used to classify the material for Moving Here: text, images (including photographs, maps, paintings, drawings, prints, etc.), 3-dimensional objects and audio-visual material.

In order to facilitate flexible searching one of the following format options should be allocated to the item being described: text, image, object, audio, film.

Text will be used for papers, files, books, newspapers, etc. and will be treated as the default value.

You may only select one type of format.

Examples:

text

image

object

audio

film

Field type in the Moving Here Website

Free text (max. 250 characters)

METADATA ELEMENT: **PHYSICAL DESCRIPTION**

Definition:

Identifies a wide range of physical description information about the original item being described.

It includes information on: medium, support, type of object, type of image, materials and techniques, extent, dimensions, scale, map designation reference, physical condition, etc.

Mandatory or optional:

OPTIONAL

Rule(s):

According to local practice provide physical description data as per the standard or convention used by your archive, library or museum.

Some institutions may have systems with very rich physical description information (sometimes under several elements of description). Bear in mind that in the context of Moving Here it is not necessary to achieve the high degree of sophistication that could be found in the catalogue systems of some museums and specialist libraries.

Other details about the physical description of text items could also be included: file, book, newspaper, etc.

Examples:

Water-colour drawing, 25x35 (cm)

Oil painting on canvas, 120x45 cm

Print, chromolithograph, 20X30 cm

Partially water damaged

Album of 35 photographs and a map, black and white…

Field type in the Moving Here Website

Free text (max. 4,000 characters)

METADATA ELEMENT: **WHERE HELD (PARTNER)**

Definition:

Identifies the institution or source providing the item to the Moving Here website.

Mandatory or optional:

MANDATORY

Rule(s):

The name of the partner institution (place of deposit) should appear under 'Where held'. This information will be displayed in the Moving Here website under the label **Where held**.

Enter the relevant abbreviations for your organisation which have been assigned by the Moving Here central team.

For users of the XML template: this element will be labeled **Partner**. Default data for this element will be entered just once, at the beginning of the template (at batch level).

Examples:

AAMBH	(Archives and Museum of Black History)
BCA	(Birmingham City Archives)
BHU	(Bradford Heritage Unit)
BL	(British Library)
CMHS	(Croydon Museum Heritage Services)
HCAS	(Hull City Archives)
HM	(Hackney Museum)
HMA	(Haringey Museum and Archive Services)
IWM	(Imperial War Museum)
JML	(Jewish Museum London)
LARO	(Lancashire Record Office)
LMA	(London Metropolitan Archives)
LMG	(Leeds Museums and Galleries)

LMS   (Luton Museum Services)

LRO   (Liverpool Record Office)

LSE   (London School of Economics)

MCL   (Manchester Central Library)

MJM   (Manchester Jewish Museum)

MOL   (Museum of London)

NMM   (National Maritime Museum)

NWFA   (North West Film Archive)

OXM   (Oxfordshire County Museums)

PRO   (Public Record Office)

PRONI   (Public Record Office of Northern Ireland)

RGS   (Royal Geographical Society)

THLA   (Tower Hamlets Local History Library and Archives)

VAA   (Victoria & Albert Museum)

WLHC   (Walsall Local History Centre)

WM   (Wandsworth Museum)

WYAS   (West Yorkshire Archive Service)

Field type in the Moving Here Website

Free text (max. 250 characters)

METADATA ELEMENT: **LANGUAGE**

Definition:

Identifies the language(s) of the text item being described.

Mandatory or optional:

OPTIONAL

Rule(s):

English should be used if all the records encompassed by the unit of description are written in English. If the records are written in English and other language(s) or entirely in language(s) other than English use the other language.

A list of language names (English spelling) as per ISO 639 standard is available at http://www.oasis-open.org/cover/iso639a.html. See the most common languages for the Moving Here website under the examples below.

For users of the XML template: where appropriate, default data for the 'Language' element (i.e. 'English') will be entered just once, at the beginning of the template (at batch level).

Examples:

Bengali	Hebrew
Byelorrusian	Hindi
Dutch	Irish
English	Lithuanian
French	Russian
German	Urdu
Gujarati	Yiddish

Field type in the Moving Here Website

Free text (max. 250 characters)

METADATA ELEMENT: **SEE ALSO**

Definition:

A note identifying related material or sources that have a direct and significant connection to the item being described.

Mandatory or optional:

OPTIONAL

Rule(s):

References to other significant material dealing with similar subjects may be appropriate.

The fact that 'see also' references to other items in Moving Here should be reciprocal should help the judgment of how significant a reference really is.

It is indeed possible to create cross-references to other material in Moving Here but bear in mind that these references become less crucial in an electronic environment, as online searching will effectively link sets of related records.

When dealing with two-level cataloguing do not create 'see also' links between a record (parent) and its sub-records (children) as these links are unnecessary in the context of a two-level hierarchy. Equally, do not create 'see also' references amongst the sub-records.

External references to key published information related to the item may also be included. Follow the standard or convention used by your archive, library or museum when quoting published sources.

See also references to other items in the partner institution or to other sources of relevant information are also possible. You may need to add explanatory text and ensure that the name of the institution or source is properly identified.

Recommended best practice is to reference by using the catalogue reference code or unique identifier and make a succinct textual reference only when necessary. Do not type 'See also', as standard 'See also' text will be displayed on screen as a label.

Examples:

L/MIL/17/5/4321

Biography of Sir Ulick John, Marquis of Clanricarde, ed R B Wernham (London, 1964).

The Peopling of London, permanent exhibition at the Museum of London.

Field type in the Moving Here Website

Free text (max. 500 characters)

METADATA ELEMENT: **RIGHTS**

Definition:

Information about rights held in and over the item being described. The Rights element encompasses Intellectual Property Rights (IPR), Copyright and various other rights (e.g. trademark).

Mandatory or optional:

MANDATORY – regardless of whether or not you can trace copyright something must be entered in this field

Rule(s):

The copyright should be cleared for all Moving Here material where possible.

We will be able to publish material where the copyright holder cannot be identified (see waiver obtained from New Opportunities Fund included)

For detailed guidance on copyright see suggested *Procedures for Clearing Copyright for Moving Here Project* (available from david.inglis@pro.gov.uk).

Rights information, including the full name of the copyright holder must appear under the Rights element for each item being described where possible.

For users of the XML template: default rights data will be entered just once at the beginning of the template (at batch level).

Examples:
Please select a type of phrase from those listed below to explain the copyright for each file/document/item (Please note these examples have been created solely for the purpose of these guidelines).

1.   Copyright partner

        Use this when you know the partner institution holds the copyright

        e.g. **"Copyright British Library"**
             "Copyright Wandsworth Museum"

2.   Copyright AN Other

Use this if copyright is other than the partner institution and there is only one copyright owner, this includes Crown copyright

e.g. **"Crown copyright"**
    "Copyright John Smith"
    "Copyright Cambridge University Press"

3.   Copyright Partner and/or Crown copyright, Oxford University Press, John Smith

This would be used to denote the fact that a document/file/item has mixed copyright. For example, this would be the case if there is a file of correspondence owned by the partner but also containing published material by another organisation

e.g. **"Copyright Jewish Museum, Crown copyright and copyright John Smith"**
    "Copyright Corporation of London and Indian Workers Association"
    "Copyright Black Cultural Archives, Virago Press and Helen Wood"

4.   Image copyright of partner

This would be used in the case of a 3 dimensional object where there is no concept of copyright in the object itself and to use the phrase "Out of copyright" might be misleading. In this case it is the digital image which is referred to.

e.g. **"Image copyright of Museum of London"**

5.   Out of copyright

Use this when you are sure the document/file/item is out of copyright

e.g.   **"Out of copyright"**

If you are concerned that this phrase will not clarify rights on the digital image provided of the original then select

"Original out of copyright; digital image copyright of *partner*"

6.　　　With permission of the copyright owner

Use this if the copyright owner wishes to remain anonymous

e.g. **"With permission of the copyright owner"**

7.　　　Copyright owner unknown

Use this if there are documents/files/items which have copyright which cannot be traced. If you cannot trace the copyright you must still fill this field in. If copyright has not yet been cleared use this phrase. You must bring these items to the attention of the PRO.

e.g. **"Copyright owner unknown"**

Field type in the Moving Here Website

Free text (max. 500 characters)

METADATA ELEMENT: **ACCESS**

Definition:

Intended to give an indication of any conditions that restrict or affect access to the original item being described. It is important to note that this element is about actual access to the items themselves at the place of location, i.e. how the user can get to see the physical document/file/object (not about their use or reproduction rights).

Mandatory or optional:

MANDATORY

Rule(s):

Internet users may wish to visit the public facilities of any partner institution in order to access the original item digitised for the Moving Here Website. Therefore, it is important that any access restriction (e.g. 'Original available for consultation by appointment') is clearly stated under the Access element.

Do not enter the word 'Access' at the beginning as the word 'access' will appear as a label on screen.

If this field is left blank in any template a general default value, "Available for consultation at "*Partner name*"" will be entered by the system. If partners would prefer a different default setting for themselves then they should contact the central team.

For users of the XML template: 'Available for consultation by appointment at *"partner name"* will be entered just once at batch level, on top of the template, as default data for the 'Access' element.

Examples:

Available for consultation at "*partner name*"

Original available for consultation by appointment at "*partner name*"

Restricted to registered researchers at "*partner name*"

Original unfit for production at "*partner name*"

Field type in the Moving Here Website

Free text (max. 500 characters)

METADATA ELEMENT: **ADDITIONAL INFORMATION**

Definition:

Specialised information that cannot be accommodated elsewhere. Administrative history information, biographical details or an historical statement about the item being described may be included here.

Mandatory or optional:

OPTIONAL

Rule(s):

This field should only be resorted to if there is useful information about the unit of description that does not belong in any of the other elements. Bear in mind that a variety of content-related information can be included under the Description element.

In the context of Moving Here, it is recommended that administrative, archival or biographical descriptions are concise and limited to the key aspects relevant to the item.

It is also possible to include the transcription of an audio-visual item (or its summary) under this element. This should only be done when the transcription is not being digitised. Ideally, transcriptions could be digitised as text and be catalogued as a sub-record of the whole audio-visual item.

Examples:

This painting belonged to Sir Peter Smith until 1958 when it was sold in auction at Leary's. An anonymous local donor purchased the item and donated it to Wandsworth Museum in 1970.

Field type in the Moving Here Website

Free text (max. 4,000 characters)

Two-level cataloguing

The first metadata recommendation states that the catalogue should be as flat as possible. In practice this means just one level of description in most instances but with the provision of a second level when both something which is a container (a file, volume or whole audio tape) and that which it contains (separate documents, pages, sections of tape) need to be described.

Following from this, the basic cataloguing rule is to adopt a flat catalogue for Moving Here. It is preferable to describe documents, files, objects, photographs and other images individually as single items. Any relevant contextual information (collection or series level data) can be repeated at the beginning of the title or description elements. Similarly, a description of any specific contents of a file can be included under the Description element. *See the cataloguing rules for Title and Description for further information.*

However, there will be cases when partners decide to use two levels of description (possibly due to the specific nature or large size of the item).

Audio-visual material could be better described using two levels. This would improve accuracy of retrieval (a long track or film may cover a variety of topics, places, Moving Here themes, etc.).

Two-level description would also facilitate access to the relevant track of the recording or film and would make the delivery or download processes more efficient.

Dealing with **transcriptions**: when transcriptions of audio-visual material are also digitised (as text), they should be catalogued as a sub-record of the whole audio-visual item. For instance, we would have a general catalogue entry describing the whole item at record level and then several sub-records for the different parts, and for the transcription.

When the transcription is not digitised: the transcript or its summary could be included at record level under the Additional Information element for the whole audio-visual item.

Examples:

A. The British Jewish Book of Honour for the First World War.

This large volume is arranged by regiment and lists the names of Jewish soldiers.

It makes sense to describe it using two levels:

> **1. Record Level**:
>
> First, describe the Book of Honour generally as a whole 'record', providing information which is common to all its components.

2. Sub-record Level:

Then break down the description using 'sub-records' for each component part (in this case regimental lists). The name of each regiment and other specific details for each sub-record will not be repeated at record level.

B. A Long Audio Recording: Caribbean Reflections, Memories of Island Life.

Caribbean Reflections, Memories of Island Life records the reflections of a group of Caribbean women from different islands. The recording is made up of different themed tracks with women from different islands providing their own insight into the different issues being discussed.

1. Record Level

First, describe the audio recording as a whole 'record', providing information which is common to all its components. For instance, the general title, general content description, references to subjects, circumstances surrounding the whole recording, recording date, key Moving Here community, key theme, etc.

2. Sub-record Level

Then we could break down the description using 'sub-records' for each component part. In this particular example the women discussed the following issues:

The islands, community life, family life, houses, doing the washing, cooking and eating, Britishness, leaving the Caribbean, arriving in Britain, settling in Britain.

The title of each shorter track and other details specific to each sub-record will not be repeated at record level.

Rule(s)

A unique catalogue reference is necessary for a record and each of its sub-records. For example:

JML AZ26/6587 for the record
 JML AZ26/6587/1
 JML AZ26/6587/2
 JML AZ26/6587/3
 etc. for the sub-records.

LMS A/3567 for the record
> LMS A/3567/1
> LMS A/3567/2
> LMS A/3567/3
> etc. for the sub-records

Avoid redundancy of information. Give information which is common to component parts at record level (e.g. data about the Honour Book or audio recording as a whole).

Do not repeat information at sub-record level that has already been given at the higher level. Details about a part should be given at sub-record level. Both, record and sub-records are searchable.

If appropriate, when dealing with sub-records containing lists of names, provide ranges of letters in the Description element. For example: *Internees Index of… for the surname range A – C.*

For users of the XML template: As different partners will require a different number of sub-records per record (and this number will vary from record to record) partners will be able to copy sub-record labels (or delete them) as necessary. Specific advice will be provided to those partners who choose to use two-level cataloguing.

For example:

```
<record>
        <cataloguereference>LMS A/3567</cataloguereference>
        <title>Caribbean Reflections</title>
        <startdate>1986</startdate>
        <description>…………..</description>
        <etc>………………</etc>

        <subrecord>
                <cataloguereference>LMS A/3567/1</cataloguereference>
                <title>the first five minutes</title>
                <startdate>1986</startdate>
                <description>…………..</description>
                <etc>……………</etc>
        </subrecord>

        <subrecord>
                <cataloguereference>LMS A/3567/2</cataloguereference>
                <title>the second five minutes</title>
                <startdate>1986</startdate>
                <description>…………..</description>
                <etc>………………</etc>
        </subrecord>
</record>
```

Use of Lists of Terms

Unfortunately, the establishment and maintenance of an agreed thesaurus and controlled vocabulary for subjects and authority terms for people, corporate bodies and places is not feasible in the lifetime and resource constraints of the project.

Contributors are encouraged to concentrate cataloguing effort on title/description, ensuring key words are incorporated there. Generally richness of description will be centred on the title/description elements.

Contributors are also encouraged to fill in elements such as subject, person, and place, using their own descriptive/indexing standards, when these exist. Effort will not be wasted as all fields will be searched (and the search screen will also allow users to specify if they are searching for a person).

Data for other elements of description (creator, publisher and contributor) can also be verified against the standard list used by your archive, library or museum.

Help and Sharing expertise

For advice approach the Moving Here Team (located at the Public Record Office, Kew):

Type of Advice	Contact person	Role	Telephone	E-mail
Metadata standards and cataloguing rules	Helen Wood	Metadata Coordinator	020 8392 5330 Ext. 2207	Helen.wood@pro.gov.uk or enquiry@movinghere.org.uk
Use of XML template	Helen Wood	Metadata Coordinator	020 8392 5330 Ext. 2207	Helen.wood@pro.gov.uk or enquiry@movinghere.org.uk
Export of data onto XML	Sonia Ranade	System Manager	020 8392 5330 Ext. 5321	Sonia.ranade@pro.gov.uk or enquiry@movinghere.org.uk
Copyright	David Inglis	Copyright and Data Protection Officer	020 8392 5330 Ext. 2513	David.inglis@pro.gov.uk or enquiry@movinghere.org.uk
Digitisation	Peter Goodwin	Digitisation Coordinator	020 8392 5330 Ext. 2446	Peter.goodwin@pro.gov.uk or enquiry@movinghere.org.uk
Liaison / Administration	Elizabeth Lovell	Project Coordinator	020 8392 5330 Ext. 5368	elizabeth.lovell@pro.gov.uk or enquiry@movinghere.org.uk
Outreach / Community work	Kerry Rowe	Community Coordinator	020 8392 5330 Ext. 5369	kerry.rowe@pro.gov.uk or enquiry@movinghere.org.uk

We would like to ask all partners to create a private mailing list with the e-mail addresses of those involved in cataloguing work for Moving Here. Please, forward the relevant e-mail addresses to helen.wood@pro.gov.uk. Once we all have this personal mailing list set up, we will be able to e-mail the cataloguing group with any doubts, queries or comments on a variety of cataloguing issues. The idea was suggested by some partners who feel this initiative will help us to share expertise, improve consistency and come up with better solutions for common problems.

Providing Descriptive Metadata

The following options are available:

1. Word template (usually for partners contributing less than 1,000 images in total)

   These partners could use a Word template distributed by the Moving Here Team at the PRO. It is a simple tab delimited Word file for conversion to XML by the central team. The elements which are asterisked * are mandatory. Two asterisks ** means one or the other element must be filled in.

Catalogue reference*	**ZPER 34/4**
Title*	**Illustrated London News**
Creator	
Description*	**Article about procession of St. Patrick's Charity School Children p.169**
Subject	
Person	
Place	
Date*	**184401 - 184406**
Publisher	
Contributor	
Community*	**Irish**
Theme*	**Settling**
Physical Format*	**Text**
Physical Description	1 article
Where Held?*	**PRO**
Language	English
See also	
Rights*	**Out of copyright**
Access	**Available for consultation at the Public Record Office**
Additional Information	

2. Access template

Below are the fields for the Access table template spread over three screen dumps. There are different versions available for Access 97 and Access 2000. The central team cannot accept Access 2002 versions. This method of contributing cataloguing metadata allows you to set the field properties in the design view of the table to ensure the maximum number of characters allowed for that field is adhered to.

3.   Excel template

The screen dumps below illustrate the fields as they look in the Excel template with an example of content

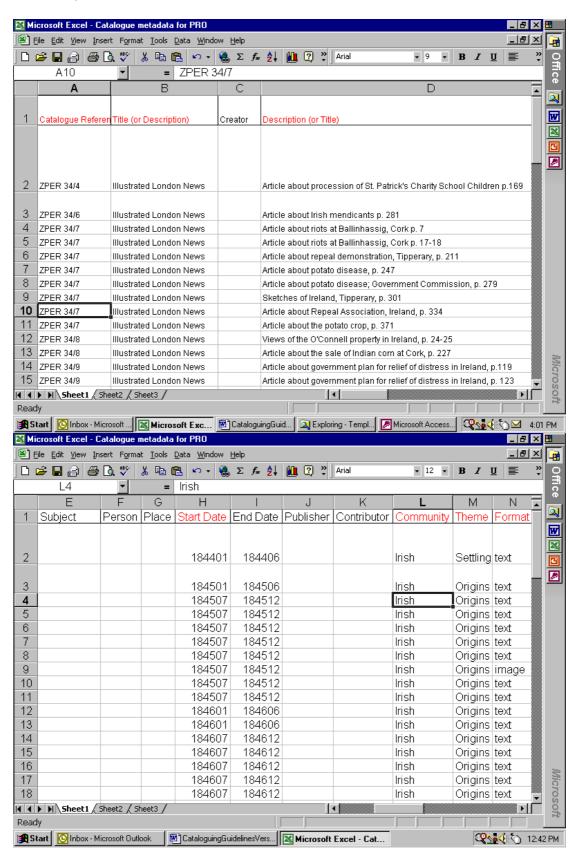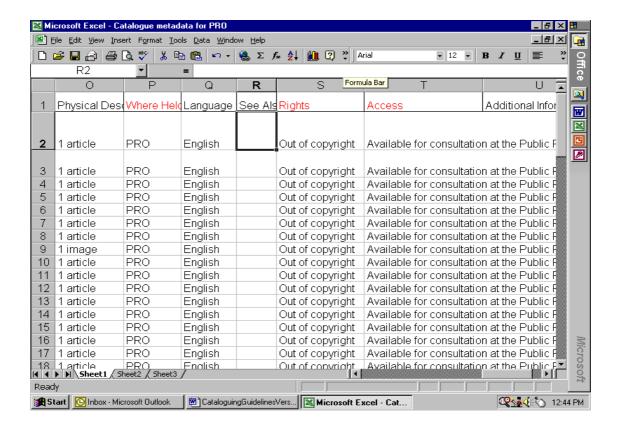|	A	B	C	D
1	Catalogue Referen	Title (or Description)	Creator	Description (or Title)
2	ZPER 34/4	Illustrated London News		Article about procession of St. Patrick's Charity School Children p.169
3	ZPER 34/6	Illustrated London News		Article about Irish mendicants p. 281
4	ZPER 34/7	Illustrated London News		Article about riots at Ballinhassig, Cork p. 7
5	ZPER 34/7	Illustrated London News		Article about riots at Ballinhassig, Cork p. 17-18
6	ZPER 34/7	Illustrated London News		Article about repeal demonstration, Tipperary, p. 211
7	ZPER 34/7	Illustrated London News		Article about potato disease, p. 247
8	ZPER 34/7	Illustrated London News		Article about potato disease; Government Commission, p. 279
9	ZPER 34/7	Illustrated London News		Sketches of Ireland, Tipperary, p. 301
10	ZPER 34/7	Illustrated London News		Article about Repeal Association, Ireland, p. 334
11	ZPER 34/7	Illustrated London News		Article about the potato crop, p. 371
12	ZPER 34/8	Illustrated London News		Views of the O'Connell property in Ireland, p. 24-25
13	ZPER 34/8	Illustrated London News		Article about the sale of Indian corn at Cork, p. 227
14	ZPER 34/9	Illustrated London News		Article about government plan for relief of distress in Ireland, p.119
15	ZPER 34/9	Illustrated London News		Article about government plan for relief of distress in Ireland, p. 123

	E	F	G	H	I	J	K	L	M	N
1	Subject	Person	Place	Start Date	End Date	Publisher	Contributor	Community	Theme	Format
2				184401	184406			Irish	Settling	text
3				184501	184506			Irish	Origins	text
4				184507	184512			Irish	Origins	text
5				184507	184512			Irish	Origins	text
6				184507	184512			Irish	Origins	text
7				184507	184512			Irish	Origins	text
8				184507	184512			Irish	Origins	text
9				184507	184512			Irish	Origins	image
10				184507	184512			Irish	Origins	text
11				184507	184512			Irish	Origins	text
12				184601	184606			Irish	Origins	text
13				184601	184606			Irish	Origins	text
14				184607	184612			Irish	Origins	text
15				184607	184612			Irish	Origins	text
16				184607	184612			Irish	Origins	text
17				184607	184612			Irish	Origins	text
18				184607	184612			Irish	Origins	text

4. XML template

The use of an XML template is an easy way to exchange and load catalogue data from many different sources. An XML template can be distributed to partners to help with the provision of catalogue data for the Moving Here system.

An XML template or schema is a ready-made computer file (in XML format) which displays mark-up labels.

```
<!ELEMENT batch (record+)>
<!ATTLIST batch
batchid ID #REQUIRED
source (AAMBH | BL | JML | LMS | MOL | NMM | PRO | RGS | VAA | WYAS |
BCA | BHU | CMHS | HM | HMA | HCAS | IWM | LARO | LMA | LMG | LRO |
LSE | MCL | MJM | NWFA | OXM | PRONI | THLA | WLHC | WM) #REQUIRED
batchtype (new | reload | test | export) "new"
batchdate NMTOKEN #IMPLIED
batchuser NMTOKEN #IMPLIED
>
<!ELEMENT record (identifier, (title | description)+, community+, theme+,
creator*, subject*, person*, publisher*, contributor*, physdesc?, language?,
relation?, place*, rights?, access?, additional?, subrecord*)>
<!ATTLIST record
startdate NMTOKEN #REQUIRED
enddate NMTOKEN #IMPLIED
```

```
format (text | image | object | audio | film) "text"
>
<!ELEMENT subrecord (identifier, (title | description)+, community+, theme+,
creator*, subject*, person*, publisher*, contributor*, physdesc?, language?,
relation?, place*, rights?, access?, additional?)>
<!ATTLIST subrecord
startdate NMTOKEN #IMPLIED
enddate NMTOKEN #IMPLIED
format (text | image | object | audio | film) #IMPLIED
>
<!ELEMENT identifier (#PCDATA)>
<!ELEMENT title (#PCDATA)>
<!ELEMENT description (#PCDATA)>
<!ELEMENT creator (#PCDATA)>
<!ELEMENT subject (#PCDATA)>
<!ELEMENT person (#PCDATA)>
<!ELEMENT publisher (#PCDATA)>
<!ELEMENT contributor (#PCDATA)>
<!ELEMENT physdesc (#PCDATA)>
<!ELEMENT language (#PCDATA)>
<!ELEMENT relation (#PCDATA)>
<!ELEMENT place (#PCDATA)>
<!ELEMENT rights (#PCDATA)>
<!ELEMENT access (#PCDATA)>
<!ELEMENT additional (#PCDATA)>
<!ELEMENT community (#PCDATA)>
<!ELEMENT theme (#PCDATA)>
```

This system is used by other UK projects where different institutions are providing access to their catalogues through a common interface (i.e. A2A Access to Archives projects).

The XML template needs to be edited using an XML editor or software tool.

ASK THE CENTRAL TEAM FOR COPIES OF THESE TEMPLATES

5. XML export from another catalogue system or database

A few partners have catalogue systems that allow them to export catalogue data for their Moving Here selection onto XML (internet file format used for Moving Here). Individual advice on conversion for exported data will be provided to these partners. Please, contact Sonia Ranade (System Manager) if you require this type of advice.