2022/2023 Metadata Guidelines for Audiovisual Objects

Robust metadata promotes wide discovery of your materials and helps create connections between collections.

California Revealed (CA-R) is an online repository of digitized materials, and we require accurate and consistent item-level description—called metadata— for each object submitted for digitization. Taking the time to create consistent, properly formatted, and well-described metadata records will ensure that your items are processed efficiently and accurately during every step of the CA-R digitization process. After digitization and publication**, item-level metadata serves as the primary point of reference for members of the public to discover, access, and use your digitized collection materials on the [CA-R website](.).**

These guidelines will help you prepare your metadata records for submission to the CA-R Repository. Please contact us at team@californiarevealed.org with any questions, or if you would like to set up a training. **The CA-R team will reach out to Partners to provide us with additional metadata if the original submission is insufficient.** *If you have any questions, please reach out - we are here to help!*

Table of Contents

Overview

What is metadata?

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

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

Partner Metadata Responsibilities

- Creates accurate item-level metadata according to CA-R guidelines.
  - o Submissions must be properly formatted and include the required metadata fields. If required fields are not included or incorrectly formatted, the inventory sheet will be sent back to Partner for correction before CA-R can move forward.
  - o If metadata exported from a database is populated into the CA-R inventory spreadsheet, Partner must review and reformat the data according to CA-R metadata guidelines.
- Conducts ongoing maintenance of metadata records throughout the digitization and preservation process.
  - o Partners have continuous access to the metadata records and can freely edit them after the digitization and publishing process via the CA-R Repository.
- Reviews metadata records after digitization, supplementing the submitted records with additional information to improve discoverability.
- Communicates with CA-R regarding the need for guidance, as well as any changes to the records and/or the physical materials.

California Revealed Metadata Responsibilities

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

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

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

How do I submit and edit my metadata records?

Metadata records can be submitted using the [Nominations Spreadsheet form](#), which CA-R staff will review and ingest into the Repository.

Partners can also submit and edit individual metadata records using the webform on the CA-R Repository.
- If you are a **new CA-R Partner without a preexisting login** for the Repository, please email team@californiarevealed.org to register for a new account.
- Step-by-step CA-R Repository access instructions for returning CA-R Partners can be found [here](#).

Why are Item-Level Metadata Records so important to the Digitization Process?

Prior to digitization, your submitted metadata records are used by CA-R staff to understand the nature and scope of the materials your institution has nominated for digitization. During this stage, the records function as an item-level inventory of what your institution proposes to digitize and preserve. We use this inventory to **estimate the cost of digitizing the materials and to understand how your materials comply with the CA-R's Selection Criteria.**

If insufficient metadata records are submitted, California Revealed will return the spreadsheet to the partner for completion.

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

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

After digitization, the metadata records are used for **access, discovery, research, and preservation purposes**. For both physical and digital materials, increased description leads to increased access. The digitized versions of your materials, along with your metadata records, will be **published and publicly available through the online CA-R Repository. The public will use your metadata records to find materials and learn about the nature and context of the objects**. The metadata fields that will be viewable to the public are identified and outlined within this document, along with the reasoning behind their publication.

For more details regarding the deliverables and specifications associated with the digitization process, please review California Revealed's [Statement of Work](#).

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

The California Revealed team will consider entries for non-item level metadata submissions on a case-by-case basis. Please email team@californiarevealed.org before proceeding with anything other than item-level record creation.

We also provide funding opportunities for the creation of item-level metadata records through our Description Assistance: Cataloging California program.

Why is it so important to submit well-described metadata?

Much like how the entries in a library catalog help librarians and patrons identify and find books within a library, item-level metadata records help Partners and CA-R staff manage materials, and help users access your objects once digitized.

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

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

It is your responsibility to submit metadata that accurately reflects the materials you wish to digitize through CA-R. As the institutional steward of your physical and digital materials, you are the expert when it comes to the describing the content of your collections.

For the sake of the materials, future users, our staffing and budget limitations, and your pride as an organization, please make a commitment to submit well-described metadata records to the best of your organization's knowledge, abilities, and resources. Keep in mind that California Revealed also provides funding opportunities for the creation of metadata records through our Description Assistance: Cataloging California program.

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

When working with historical materials, sometimes a creator, date, or another metadata field might truly be unknown. The required metadata fields that allow for the condition of "Unknown" are explicitly defined throughout this document.

Please note that *whenever appropriate, an inference or guess is always preferred for access and description purposes.* Advice regarding how to format an approximation or guess is provided. For the non-required fields, if a value is unknown and cannot be inferred, please leave it blank.

Controlled Vocabularies and Standardized Formatting

While creating your metadata records, please use the existing controlled vocabulary lists when applicable.

CA-R relies on standardized names, terms, and formats for metadata records. These standards are used both nationally and internationally by libraries, archives, museums, and other collecting institutions, allowing us to be in conversation with a wide network of organizations and materials.

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

CA-R creates metadata records for audiovisual objects (film, video, and audio recordings, etc.) using the audiovisual specific PBCore metadata schema. We use the Dublin Core metadata schema, a standard for organizing information on physical and digital resources, to create metadata records for still image and text objects. For more information about these schemas, our controlled vocabularies, and other tools for describing digitized materials, please see Section 6. Metadata Resources and Controlled Vocabularies in this document.

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

If you have any questions about our metadata requirements, please email us at team@californiarevealed.org. Thank you for contributing to the California Revealed collection!

1. Required Metadata Fields

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

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

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

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

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

Example   `California State Library`

1.2 Title

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

Sources of Information

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

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

1.2.3   Review 6.2 Descriptive Metadata Resources for additional guidance regarding title creation.

General Rules

1.2.4   It is strongly recommended that titles, whether formal or supplied, are unique. Distinguish similar or duplicate titles with dates, sequential numbers, or additional description.

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

1.2.6   All titles should be consistently formatted with respect to the naming conventions used for other items within the submission. For example, if you title one of your objects "Santa Cruz trip: home movie," you would title a similar object "San Diego trip: home movie," rather than "Home movie, San Diego Trip". This will allow users to find multiple items using the same search terms.

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

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

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

1.2.9.1   See 2.11 Related Materials/Relationship Type, 3.1 Alternative Title, 3.2 Series Title, and 3.3 Collection Guide Title/Collection Guide URL to learn how to link your submissions to previously digitized items.

Example (Open reel tape, supplied title)	`Oral History: Bill Robinson`
Example (Film, supplied title)	`[Anne and Bill Armor, Summer 1948]`
Example (Audiocassette, formal title)	`Interview with William H. Golden`
Example (VHS, part 1 of 2, supplied title)	`Holiday Party part 1`
Example (VHS, part 2 of 2, supplied title)	`Holiday Party part 2`

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

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

Sources of Information

1.3.1   A Call Number is your Institution's unique identifier. This field will display online and will be used by both your own Institution and the public to identify the items within your Institution's holdings.

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

General Rules

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

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

Examples	`R385.005 (01), R385.005 (02), R385.005 (03)`
Examples	`img4200.jpg, img4201.jpg, TheArtofClowning.pdf`

1.4 Created Date

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

Commentary: If a date is Unknown, the value XXXX is acceptable. However, it is more useful and descriptive to include an approximate date for access purposes. Whenever possible, please include an exact or approximate value in the 1.4 Created Date *field and the* 2.8 Temporal Coverage *field.*

Sources of Information

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

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

General Rules

1.4.3   If unknown and not possible to assume or approximate, enter the value: XXXX.

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

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

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

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

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

Example	`1976-07-04`
Example (May 1976)	`1976-05`
Example	`1976`
Example (1990s)	`199X`
Example (circa 1990s)	`199X~`
Example (August 1, 1993 to April 5, 1994)	`1993-08-01/1994-04-05`
Example (July 1, 1993 and July 3, 1993)	`[1993-07-01,1993-07-03]`
Example (20th century?)	`19XX?`
Example (Unknown)	`XXXX`

1.5 Creators and contributors

A person, family, or group responsible for, or involved in, the creation and dissemination of the material, such as the director, producer, or writer (see full list below). **It is required to provide a value for at least one of these fields.** Record information for as many of the roles as possible for increased discoverability. Multiple values are accepted. Individual names must be formatted as Last Name, First Name. This field will be viewable to the public and used to find and access your materials.

1.5 See the PBCore controlled vocabulary Creator/Contributor roles for more information on the roles below:

- o   Producer
- o   Director
- o   Writer
- o   Editor

- Cinematographer
- Interviewer
- Interviewee
- Actor
- Artist
- Artistic Director
- Author
- Camera Operator
- Choreographer
- Commentator
- Composer
- Conductor
- Costume designer
- Filmmaker
- Host
- Moderator
- Musician
- Narrator
- Panelist
- Performer
- Photographer
- Recording engineer
- Reporter
- Set designer
- Sound designer
- Speaker
- Technical director

Sources of Information

1.5.1   Take the information from any reliable source, including internal evidence of the materials being described, or information from an outside source, such as a donor. Once the record has been digitized, update the records and refer to any introductions, title pages, or credits to correct or fill in missing fields.

1.5.2   A *Creator* is a person, family, or group responsible for the creation of the material. Use this field if values for more specific roles such as Producer, Director, Interviewee, etc. are unknown or not applicable.

1.5.3   If an entity is named, and their role is known, designate their role using the appropriate term listed in the PBCore Controlled vocabulary: https://pbcore.org/pbcore-controlled-vocabularies/creatorrole-and-contributorrole-vocabulary/

1.5.4   Record the name in the form by which the entity is generally known, even if different from what is listed on the object.

1.5.4.1   If created by a well-known entity, use the same format of the name used in the Library of Congress Name Authority File: http://id.loc.gov/authorities/names.html

General Rules

1.5.5   Individual names must be formatted as *Last Name, First Name*.

1.5.6   Spell out abbreviations.

1.5.7   If creator is assumed, enclose in brackets.

1.5.8   If creator is uncertain, use "?" at the end.

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

1.6 Significance

Explain why the object or collection is significant to California and/or local history. Justify why the object should be preserved and made accessible for future generations. This field is used to determine whether the materials are appropriate for digitization and inclusion in the California Revealed collection. This field will *not* be displayed online.

Sources of Information

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

General Rules

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

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

1.6.4.   Use complete sentences when writing the significance statement.

Example	The California Public Broadcasting Commission, Sacramento Update newscast tapes are significant because they reveal insight into the political happenings in the State Capitol during the early 1980s.

1.7 Description

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

Sources of Information

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

General Rules

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

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

1.7.4   Avoid using abbreviations or special characters.

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

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

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

Example   `Silent color film shows installation of 1st NASA automatic weather station (now called RAWS) at Hopland, CA. Film shows field work done on site by California Department of Forestry employees and equipment being installed. Scenes appear to be at location of modern day "Hogs Lake" weather station near Hopland Forestry station.`

1.8 Condition/Condition Notes

Use the Condition field to classify the object's physical condition using the following controlled vocabulary: Excellent, Good, Fair, Poor, Unknown. If the object's condition is anything other than Excellent or Good, you are required to further describe the state of the material using the Condition Notes field.

Please note any prior damage, where and how the material has deteriorated, or if the object requires special handling.

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

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

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

General Rules
1.8.3   Description of condition should be brief, but sufficient for us to understand the existing condition of the item and how to handle it during digitization.

Example   `Poor; Film is brittle and smells like vinegar.`

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

Sources of Information
1.9.1   *Moving Image* refers to motion picture materials, such as film, that capture movement. These can include sound, in addition to moving visuals.
1.9.2   *Sound* refers to audio materials, such as a recording of an interview. Sound media does not have a visual component.

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

Example   `Moving Image`
Example   `Sound`

1.10 Gauge and Format
Identify the physical format of the resource using our controlled vocabulary (listed in 1.11.1 below). See the PBCore controlled vocabularies for a complete set of formats: Audio, Video, Film. You can also consult the CA-R AV Format Guide if you are unsure of the item's format. This field will be viewable to the public and used to find and access your materials.

Sources of Information
1.10.1 Choices include but **are not limited to** the following: *1 inch audio tape, 1/2 inch audio tape, 1/4 inch audio tape, 1/4 inch audio tape, 1/8 inch audio cassette, VHS, U-matic, Betamax, Betacam,*

MiniDV, Hi8, 16mm film, 35mm film, 8mm film, Super 8mm film, Audio CD, DVD, Blu-Ray Disc, LaserDisc, Vinyl Recording.

        1.10.1.1 If submitting audiovisual material in a digital format, list the digital file format: *.mov, .mp4, .m4a, .mp3, .wav, .mkv, .ogv, or .dv.*

Example   `16mm film`
Example   `MiniDV`

1.11 Total Number of Items per Record/Object

The Total Number of Items per Record/Object field describes the total number of reels, tapes, or discs contained within an object. This field is used by CA-R staff to calculate a digitization price estimate, as well as to identify and digitize your materials. This field will be viewable to the public and used to describe your materials.

Sources of Information

1.11.1 Count the total number of physical items (reels, tapes, or discs) within the object, e.g., 4 tapes and then record just the number of items.

Example   `1`
Example   `2`

1.12 Copyright Statement

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

Sources of Information

1.12.1 Please see CA-R Permissions Guidelines for guidance regarding determining the copyright status of your materials. Choose between the 3 boilerplate statements provided.

1.12.2 As of January 1, 2021, most materials created prior to 1925 are considered Public Domain and can be freely used by the public. To determine if an object falls in the public domain, consult: https://copyright.cornell.edu/publicdomain

General Rules

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

Public Domain   `Public Domain. No Restrictions on use.`

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

1.13 Duration

This field provides information on the exact or approximate duration of the audiovisual recording being nominated by the partner.

Sources of Information

1.13.1 Pre-existing inventories are a good resource for duration information.

1.13.2 The recording's container may have duration information.

General Rules

1.13.3 Enter duration formatted as hh:mm:ss.

Example   01:55:23

2. Recommended Metadata Fields

This section provides guidance and definitions regarding metadata fields that CA-R **highly recommends** filling out to adequately describe and promote the online discovery of your objects. However, certain fields might require information that the Partner is unable to obtain.

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

Including as much metadata as possible is crucial to helping the public access your digitized objects through the CA-R Repository. CA-R will reach out to Partners to provide us with additional metadata if the original submission is insufficient.

2.1 Partner Administrative Notes

Administrative or technical notes to California Revealed staff and/or vendor(s), as needed. This field will not display online.

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

2.2 Generation

A controlled field denoting the status of the item as a copy or an original. CA-R prefers to digitize the original source or the closest available source to the original (a first-generation copy). This field will be viewable to the public and used to describe your materials.

Sources of Information

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

General Rules

2.2.2 Values will differ depending on the type of Audiovisual material (film, videotape, audiotape, etc.) Select a value such as *Original*, *Negative*, *Dub*, or *Copy*.

Example	`Original`
Example	`Copy`

2.3 Item Annotations

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

Sources of Information

2.3.1   Survey the item for any relevant information as it is recorded on the object,

such as the label on a VHS tape or writing on a film can. Review <u>6.2 Descriptive Metadata Resources</u> for additional guidance regarding recording item annotations.

General Rules

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

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

Example   `Film can label: "Preview 1967. Sniff & Snuff and the Smokey Bear Jingle."`

2.4 Subject (Topic)

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

Sources of Information

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

General Rules

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

Example   `Wildfires; Airplanes; Fire engines and equipment`

2.5 Subject (Entity)

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

Sources of Information

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

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

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

General Rules

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

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

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

Example   `Rickard, Joseph, -1994`
Example   `University of California, Berkeley`
Example   `California. Division of Forestry`

2.6 Genre

Categorical description informed by the topical nature or a particular style or form of the content. This field will be viewable to the public and used to find and access your materials.

Sources of Information

2.6.1   Survey the item for any relevant information and record it, referencing the Library of Congress Genre/Form Controlled Vocabulary: https://id.loc.gov/authorities/genreForms.html

General Rules

2.6.2   To add multiple entries, please click "Add another item" if inputting online. If submitting using a spreadsheet, separate multiple entries using a ";"

Example   `Home movies`
Example   `Oral histories`

2.7 Spatial Coverage

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

Sources of Information

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

General Rules

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

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

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

2.8 Temporal Coverage

Temporal coverage identifies a span of time discussed in a resource, and is intended to list dates, years, and time periods not already covered in the date created or date published fields. Coverage may also be a named period, date, or date range. To add multiple entries, please click "Add another item".

Sources of Information

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

General Rules

2.8.2   Format as YYYY-MM-DD.

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

2.8.4   For guidance on formatting, see 1.4 Created Date.

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

2.9 Language

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

Sources of Information

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

General Rules

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

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

2.10 Country of Creation

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

Sources of Information

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

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

Example (United States of America)   US
Example (Mexico)   MX
Example (Canada)   CA

2.11 Related Materials/Relationship Type

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

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

If you are submitting metadata records via the CA-R Repository record form (rather than the Nominations spreadsheet) and you wish to relate to an object that is not already in the CA-R Repository, Related Materials/Relationship Type should be entered in 2.1 Partner Administrative Notes.

Sources of Information

2.11.1 Survey the items, in addition to objects you have previously digitized with CA-R, and record any direct connections between the objects. List the related Identifier(s) in the Relationship field.

2.11.2 Use the Relationship Type field to define the relationship. Options include "isRelatedTo" or "isPartOf".

General Rules

2.11.3 Depending on what objects you listed in the Relationship field, define the connection using the Relationship Type field. For example, use "isRelatedTo" if there is another format, or "isPartOf" if referencing an object's presence within another object. A complete list of Relationship Type options can be found within the Nominations Ingest spreadsheet and the webform on the CA-R Repository.

Example (Oral history recording and oral history transcript)

Title	Relationship	Relationship Type
Whittier Oral History Recording	Whittier Oral History Transcript	isRelatedTo

| Whittier Oral History Transcript | Whittier Oral History Recording | IsRelatedTo |

2.12 Transcript

If there is a transcript that is not part of the CA-R Repository but is associated with an AV object, please provide it here. If you are creating an AV record in the CA-R Repository record form, you can either copy the transcript text directly into the Transcript field or provide a URL to an external transcript document via the Transcript URL field.

Sources of Information

2.12.1 Survey the item for the relevant information and record it,

General Rules

2.12.2 This field should contain URLs of the transcript associated with the AV record.

Example: `https://archive.org/details/makingsolidarity00eiterich`

2.13 Asset Type

The broad type of intellectual content being described. This field will be viewable to the public and used to find and access your materials.

Sources of Information

2.13.1 Survey the item for any relevant information and record it, referencing the PBCore Asset Type Controlled Vocabulary: https://pbcore.org/pbcore-controlled-vocabularies/pbcoreassettype-vocabulary/

General Rules

2.13.2 This field may only contain a single value.

Example   `Album`
Example   `Raw Footage`

3. Context Dependent Metadata Fields

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

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

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Including as much metadata as possible is crucial to helping the public access your digitized objects through the CA-R Repository. CA-R will reach out to Partners to provide us with additional metadata if the original submission is insufficient.

3.1 Alternative Title

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

Sources of Information

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

General Rules

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

Example   `Johnny's R.O.T.C.[sic] Tape`

3.2 Series Title

Used to identify and group items that are part of the same the same archival series, collection, or an equivalently broad grouping. A Series Title will link your items together on californiarevealed.org, and help users find items that are related or relevant to each other. The fields are used to group materials that are associated with each other but are not directly linked using the 2.11 Relationship/Relationship Type field.

Sources of Information

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

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

General Rules

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

3.2.4   If you have used the Series Title field to describe a grouping in past submissions, and you wish to submit additional items in the same grouping, use the same Series Title to connect current and past Submissions.

Example   `Audiovisual Recordings from the Earl Warren Papers`

Example   `Southern California Edison Motion Picture Films`

3.3 Collection Guide Title/Collection Guide URL

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

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

Sources of Information

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

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

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

Example   `Southern California Edison Motion Picture Film: Finding Aid`
Example   `Inventory of the Earl Warren Papers, 1924-53`

3.4 Published Date

The Published Date field denotes the date of formal issuance of the material, if different from the 1.4 Created Date field.

Sources of Information

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

General Rules

3.4.2   Format as YYYY-MM-DD.

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

Example   `1976-09-20`

Example (1960s)	`196X`
Example (circa March 1972)	`1972-03~`
Example (August 1, 1993 to April 5, 1994)	`1993-08-01/1994-04-05`

3.5 Distributor

Distributor identifies a person, people, or organization primarily responsible for distributing or making the asset available to others. The Distributor may be a person, a business, organization, group, project or service. This field will be viewable to the public and used to find and access your materials.

If submitting metadata records using the CA-R Repository (rather than the spreadsheet), the Distributor can be entered by clicking "Add" within the "Creators and Contributors" section. Enter the name of the Distributor under "Entity Name" and type in "Distributor" under "Entity Role".

Sources of Information

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

3.5.2   Record the name in the form by which the publisher is formally known.
    3.6.2.1   If the entity is widely known, use the same format of the name used in the Library of Congress Name Authority File: http://id.loc.gov/authorities/names.html

General Rules

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

3.5.4   Spell out abbreviations.

3.5.5   If assumed, enclose in brackets.

3.5.6   If uncertain, use "?" at the end.

Example	`KQW (Radio station : San Francisco, Calif.)`
Example	`Kennedy family?`
Example	`[United States. Bureau of Insular Affairs]`

3.6 Copyright Date

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

Sources of Information

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

General Rules

3.6.2   Format as YYYY-MM-DD.

3.6.3   For further guidance, see General Rules under <u>1.4 Created Date.</u>

Example   `1986-09-04`

3.7 Copyright Holder

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

If submitting metadata records using the CA-R Repository record form (rather than the spreadsheet), the Copyright Holder can be entered by clicking "Add" within the "Creators and Contributors" section. Enter the name of the Copyright Holder under "Entity Name" and type in "Copyright Holder" under "Entity Role".

Sources of Information
3.7.1   Record the name in the form by which the copyright holder is formally known.
   3.7.2.1   If the entity is widely known, use the same format of the name used in the Library of Congress Name Authority File: <u>http://id.loc.gov/authorities/names.html</u>

General Rules
3.7.2   Individual names must be formatted as Last Name, First Name.
3.7.3   Spell out abbreviations.

Example   `Doe, John`

3.8 Copyright Holder Information

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

General Rules
3.8.1   You also have the option to enter "Consult owning institution for copyright holder contact information."

Example   `John.Doe@hotmail.com`

3.9 Copyright Notice

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

General Rules
3.9.1   Enter the copyright statement as it appears in the work.

Example   ©1977 Paramount Pictures

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

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

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

4. Metadata Fields Used After Submission

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

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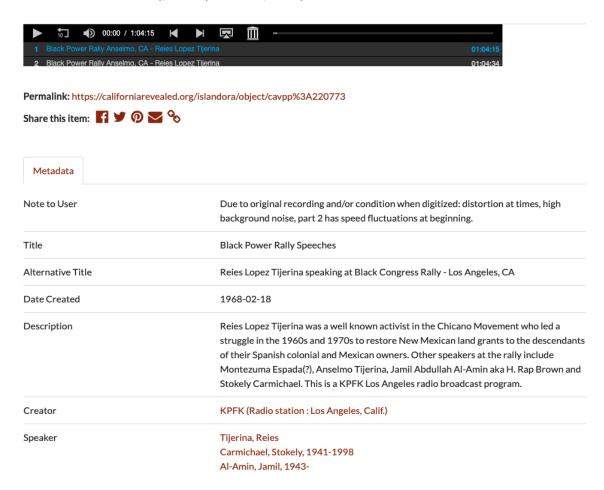
5. Submission Examples

An example of a digitized object and its submitted metadata record, as published on the CA-R website:

Black Power Rally Speeches

Collection: Ethnic Studies Library, University of California, Berkeley

▶	↻	🔊	00:00 / 1:04:15	⏮	⏭	🖵	🏛	▬▬▬▬▬▬▬▬▬

| 1 | Black Power Rally Anselmo, CA - Reies Lopez Tijerina | 01:04:15 |
| 2 | Black Power Rally Anselmo, CA - Reies Lopez Tijerina | 01:04:34 |

Permalink: https://californiarevealed.org/islandora/object/cavpp%3A220773

Share this item: 📘 🐦 📌 ✉ 🔗

Metadata

Note to User	Due to original recording and/or condition when digitized: distortion at times, high background noise, part 2 has speed fluctuations at beginning.
Title	Black Power Rally Speeches
Alternative Title	Reies Lopez Tijerina speaking at Black Congress Rally - Los Angeles, CA
Date Created	1968-02-18
Description	Reies Lopez Tijerina was a well known activist in the Chicano Movement who led a struggle in the 1960s and 1970s to restore New Mexican land grants to the descendants of their Spanish colonial and Mexican owners. Other speakers at the rally include Montezuma Espada(?), Anselmo Tijerina, Jamil Abdullah Al-Amin aka H. Rap Brown and Stokely Carmichael. This is a KPFK Los Angeles radio broadcast program.
Creator	KPFK (Radio station : Los Angeles, Calif.)
Speaker	Tijerina, Reies Carmichael, Stokely, 1941-1998 Al-Amin, Jamil, 1943-

Distributor	KPFK (Radio station : Los Angeles, Calif.)
Subject Topic	Racism
	Chicano movement
	Civil rights movements
	Reparations for historical injustices
	Police Brutality
	Classism
	Black power
	Military-industrial complex
	Racism in education
Subject Entity	National Brown Beret Organization
	Newton, Huey P.
Genre	Radio shows
	Speeches
Location	Los Angeles (Calif.)
Language	eng
Media Type	Sound
Format	1/4 inch audio tape
Number of Parts	1 Tape of 1
Stock Manufacturer	Audio Magnetics
Copyright Statement	Copyright status unknown. This work may be protected by the U.S. Copyright Law (Title 17, U.S.C.). In addition, its reproduction may be restricted by terms of gift or purchase agreements, donor restrictions, privacy and publicity rights, licensing and trademarks. This work is accessible for purposes of education and research. Transmission or reproduction of works protected by copyright beyond that allowed by fair use requires the written permission of the copyright owners. Works not in the public domain cannot be commercially exploited without permission of the copyright owner. Responsibility for any use rests exclusively with the user. The Ethnic Studies Library, University of California, Berkeley attempted to find rights owners without success but is eager to hear from them so that we may obtain permission, if needed. Upon request to the esl@library.berkeley.edu digitized works can be removed from public view if there are rights issues that need to be resolved.
Country of Creation	US
Source Institution	Ethnic Studies Library, University of California, Berkeley
Source Call Number	CS.2020.1.Audio009
Source Institution Contact Information	U.C. Berkeley, 30 Stephens Hall, Berkeley, CA, 94720-2360, US, Telephone: (510) 643-1234, email: esl@library.berkeley.edu, http://eslibrary.berkeley.edu/

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5.1 Examples of Published Metadata Records by Format

Format	Link to Example
VHS	[Video Recording of Tsunami Waves](#)
DVD	[TANG (Tradeswomen Address the Next Generation) Project Interviews](#)
16mm film	[The Psychedelic Experience](#)
MiniDV	[Interview with cartoonist Morrie Turner](#)
¼ Inch Audio Tape	[Bing Barroga the Aloha Serenaders: At Eddie's](#)
Audio cassette	[The Land Dispute Struggle of the Pit River Indians and Pacific Gas and Electric Company](#)

6. Metadata Resources and Controlled Vocabularies

CA-R creates metadata records for audiovisual objects (film, video, and audio recordings, etc.) in the [PBCore metadata schema](#), a standard for describing audiovisual media that was developed by the public broadcasting community. We work with digitization service providers to format descriptive, rights, administrative, and technical metadata as a master xml metadata file to be "wrapped" with the digital object. The metadata record for each object will comprise all information relating to the original source, the master digital file, the associated sets of derivative digital files, and technical details regarding the transfer of the original source materials.

For more information regarding this process, review California Revealed's [Statement of Work](#).

6.1 PBCore Resources

- An Introduction to the PBCore Metadata Schema
  https://pbcore.org/

- PBCore Metadata Elements
  https://pbcore.org/elements/element-hierarchy

- PBCore Controlled Vocabularies
  https://pbcore.org/pbcore-controlled-vocabularies

6.2 Descriptive Metadata Resources

- Description and Access: A Content Standard (DACS) from the Society of American Archivists
  https://files.archivists.org/pubs/DACS_2019.0.3_Version.pdf

- Archives for Black Lives in Philadelphia's Anti-Racist Description Resources
  https://archivesforblacklives.files.wordpress.com/2019/10/ardr_final.pdf

6.3 Controlled Vocabularies

- Library of Congress Extended Date/Time Format
  https://www.loc.gov/standards/datetime/
  - CA-R Metadata fields: 1.4 Created Date, 2.7 Temporal Coverage, 3.5 Published Date, 3.8 Copyright Date

- Library of Congress Name Authority File (LCNAF)
  https://id.loc.gov/authorities/names.html
  - CA-R Metadata fields: 1.5 Creators and Contributors, 2.5 Subject (Entity), 2.6 Spatial Coverage, 3.6 Publisher, 3.7 Publication Location, 3.9 Copyright Holder

- MARC Code List for Relators Scheme
  https://id.loc.gov/vocabulary/relators.html
  - CA-R Metadata fields: 1.5 Creators and Contributors

- Library of Congress Subject Headings (LCSH)
  https://id.loc.gov/authorities/subjects.html
  - CA-R Metadata fields: 2.4 Subject (Topic)

- ISO 639.2 Codes for Names of Languages
  https://www.loc.gov/standards/iso639-2/php/code_list.php
  - CA-R Metadata fields: 2.8 Language

- ISO 3166-1 Country Codes
  https://www.iso.org/obp/ui/#search
  - CA-R Metadata fields: 2.9 Country of Creation

- PBCore Controlled Vocabularies
  https://pbcore.org/pbcore-controlled-vocabularies
  - CA-R Metadata fields: 1.11 Gauge and Format, 1.9 Media Type

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