CWRGM Metadata Protocols

Title: Civil War and Reconstruction Governors of Mississippi Project
                         Metadata Guidelines

Purpose: Guidelines for creating metadata for CWRGM
                         project

For: CWRGM project partners and student workers

Maintained by: Mississippi Digital Library Assistant Director; CWRGM Editorial Team
                         Members

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Introduction

This document provides instructions for creating metadata for the Civil War and Reconstruction Governors of Mississippi (CWRGM) project.

Metadata records for the CWRGM project are written to comply with the Mississippi Digital Library's Metadata Best Practices and are based on the Dublin Core Metadata Initiative (DC) data element set. Other directives consulted for these guidelines include:
- *Archives, Personal Papers, and Manuscripts*
- *DACS: Describing Archives, A Content Standard*
- *Anglo-American Cataloging Rules*
- *Digital Public Library of America Metadata Quality Guidelines*

These guidelines contain specific formatting requirements and minute details, including punctuation and capitalization that are vital for the proper functionality of metadata. Please be vigilant and pay attention to these details.

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Object name

The Object Name field is necessary for our software to pair multiple files into one object (i.e., link multiple pages of a single letter together). In this context, the Object name is the same as the identifier. See Identifier below.

Identifier

A unique identifier is assigned to each document. It contains an institutional identifier, as well as the file name identifying the collection and item. The institutional identifier for MDAH is mdah.

Example of a letter from the John J. Pettus Letters:
    mdah_757-930-01-07

The Identifier is assigned to the digital object as a whole, whether it is a single page or a multi-page document.

The staff at MDAH will assign the identifiers for all CWRGM materials.

Alternate ID

The Alternate ID is used when a document receives a new file name or identifier. The new file name is entered into the Identifier field and the old file name is entered into the Alternate ID field.

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The Digital Collections staff at USM will assign an Alternate ID as necessary.

For this project, the Alternate ID field can be left blank unless specified otherwise.

Title

Titles should be noted on the calendars provided by MDAH.

Letters, Memos, and Other Correspondence

Letters should be named in the following basic format. Use this format also for Memos and other forms of correspondence.

Letter from_____ to_____; Date
Memo from_____ to_____; Date
Letter from Zoya Zeman to Erwin D. Zeman; March 5, 1964
Memo from Victoria Gray (Adams) to friends and supporters of MFDP; February 10, 1966

If an author or recipient name contains initials, each letter in the initials should be followed by a period. Each initial should also be separated with a space.

Letter from A. J. Harris to Mississippi Governor John J. Pettus; September 20, 1861

If an author or recipient was known to hold a political title or military rank at the time of writing or receiving the document, said title or rank should be recorded.

Telegram from J. B. Morey to General Charles Clark; June 21, 1861
Letter from Captain W. L. Towner to Mississippi Governor John J. Pettus; August 14, 1861

If there is no recipient listed on the document, record:

Letter from_____ ; Date
Letter from [author]; date
Letter from John D. Elliott; February 2, 1862

If there is no author listed on the document, record:

Letter to _____ ; Date
Letter to [recipient]; date
Letter to Mississippi Governor John J. Pettus; April 17, 1862

If the document lacks both a recipient and an author, record:

Letter; Date
Letter; date
Letter; June 27, 1861

If there is no date on the document and it is not possible to confer a date, record Undated.
> *Letter from Zoya Zeman to Erwin D. Zeman; Undated*
> *Memo from MFDP to teachers; Undated*

If there is a month and year on the document but no day, record:
> Letter from_____ to_____; Month Year
> *Letter from John Ratliff to Mississippi Governor John J. Pettus; February 1862*

If there is a month and day on the document but no year, record:
> from_____ to_____; Month Day, [year unknown]
> *Letter from Reuben Davisto Mississippi Governor John J. Pettus; March 3, [year unknown]*

Alternate title(s)

Alternate titles are used for publications that have a secondary title or an alternate title in a foreign language.

In general, letters will not have an alternate title.

Replaces

The Replaces field is used when a serial's title has been changed and replaced by a new title. The old title is entered into the Replaces field.

In general, letters will not have a replaces title.

Replaced by

The Replaced by field is used when a serial's title has been changed and replaced by a new title. The new title is entered into the Replaced by field.

In general, letters will not have a replaced by title.

Description

This is a brief summary beginning with a standardized phrase. Individual documents begin with the name of the collection. Finding aids begin with a phrase using those words.
> *From the Mississippi Department of Archives and*
> *History Governor Pettus Collection.*

Follow the standardized phrase with a short abstract in full sentences with correct grammar and punctuation. Avoid editorial comments. If the document is a transcribed copy, note this at the beginning of the abstract information.
> *Transcribed copy of a letter …*

Descriptions should be noted in the calendar provided by MDAH and can be copied from there and added after the standardized phrase.

If any of the following terms appear in the Description and/or Title fields, update the terminology with the follow reparative metadata:

Replace *colored* or *negro/es* with *African American/s*.

Replace *slave/s* with *enslaved person/s.*

Use *enslaved man* when sex is identified.

Use *enslaved woman* when sex is identified.

Replace *Indian/s* with *Native American/s*.

Use tribal name when the tribe is identified.

Replace *enemy* with *United States Army*.

Use *United States Navy* when applicable.

Use *United States forces* when it is unclear whether it is Army or Navy.

Replace *black Republican/s* with *Republican/s*.

Add *alleged* when referring to criminal activity.

When updating terms, follow these guidelines:

Pay attention to how the term is being used within that context and keep it consistent.

Keep the term's singular or plural form consistent.

Do not use the "find and replace" function to update terminology.

Examples:

Original Description: *Letter from Jno. B. Harnley to Mississippi Governor John J. Pettus seeking muskets to arm a home guard being raised to prevent a negro insurrection.*

Updated Description: *Letter from Jno. B. Harnley to Mississippi Governor John J. Pettus seeking muskets to arm a home guard being raised to prevent an alleged African American insurrection.*

Original Description: *Letter from Will Beaty in Columbus, Arkansas, to Mississippi Governor John J. Pettus concerning land claims by the Choctaw Indians.*

Updated Description: *Letter from Will Beaty in Columbus, Arkansas, to Mississippi Governor John J. Pettus concerning land claims by the Choctaw Native Americans.*

Original Description: *Letter from R. L. Watson and Lawrence Johnson at Holly Springs, Mississippi, to Mississippi Governor John J. Pettus requesting authority to raise a partisan company and operate against the enemy.*

Updated Description: *Letter from R. L. Watson and Lawrence Johnson at Holly Springs, Mississippi, to Mississippi Governor John J. Pettus requesting authority to raise a partisan company and operate against United States forces.*

Creator

The creator is the author of a letter. The creator may be an individual, multiple people, or an organization. Information about the creator should be taken from the original document or the calendar. Record the name as:

> *Last name, First name, dates*

If the author has a Library of Congress name authority record, use the name as it appears there. https://authorities.loc.gov/

Examples:
> *Adams, Victoria Gray, 1926-2006*
> *Bilbo, Theodore Gilmore, 1877-1947*

Some names may variably appear with or without a period at the end. For the sake of consistency, remove terminal periods **unless they indicate an abbreviation such as a middle initial**. Other forms of terminal punctuation, such as those used to indicate open or uncertain date ranges, may be retained. There are several examples shown below.

Examples of when to keep the ending punctuation:
> *Adams, Victoria Gray, 1926-* (Keep the ending -)
> *Nash, Charles T.* (Keep the ending . after the middle initial)
> *McLemore, Amos, 1823?-1863?* (Keep the ending ? after the dates of life)

Example of when to remove the ending punctuation:
> *Brown, Buster, 1937-1975.*
> Remove the ending . so the entry reads:
> *Brown, Buster, 1937-1975*

If the author does **not** have a Library of Congress name authority record, use the name on the document and record the name in *Last Name, First Name* format.
Examples:
> *McEwen, A. C.*
> *Hynes, John R.*

If the author is titled as Mrs. record the name in *Last Name, Mrs. First Name* format.
Examples:
> *Ray, Mrs. E.*
> *O'Conners, Mrs.*
> *Parks, Mrs. Andy*

If the author/creator is unknown, enter Unknown. When the last name of the author/creator is unknown, enter the author's first name and [last name unknown]. When the first name of the author/creator is unknown, enter the author's last name and [first name unknown].
> *Unknown*

Thomas [last name unknown]
Deviss, [first name unknown]

If an item has more than one creator, list each name in alphabetical order. Separate multiple entries with a semi-colon. List added authors in this manner. An item written by Zoya Zeman and Buster Brown would be recorded:
Brown, Buster, 1937-1975; Zeman, Zoya, 1943-

Separate multiple entries with a semicolon. Do not add a semicolon following the last entry.

Searchable Date

The Searchable Date field indicates the date the item was originally produced. Take the date from the original or the calendar (if a date is present). **If an item is undated, leave this field blank.** The international standard ISO 8601 is used to indicate date formats. Dates should be expressed as yyyy-mm-dd.

Other formatting rules include:

Dates must be valid for the given month and year. A date in February cannot be greater than 28 except in a leap year (29); a date in March cannot be greater than 31.

The year must be shown with four digits.

Date

The Date field indicates the date the item was originally produced. Take the date from the original or the calendar (if a date is present). The Date field should be used in conjunction with the Searchable Date field, and it should be completed for every item. This field is viewable in the public interface.

If the date is simply unknown, record Undated.
Undated

Coverage: (time period)

The Coverage field identifies the time period covered in each document and can be derived from the document itself. It is usually not one specific date.

If the time period covers several months in one year: [Year]
1964

Time period

The Time Period field is related to the Coverage Field. It is not visible in the public interface and is used primarily to build custom searches.

The Time Period is a controlled vocabulary field. Separate multiple entries with a semicolon. Remove the semicolon that follows the last entry.

Use the date/dates in the Coverage field to determine the appropriate decade/decades to select from the controlled vocabulary in the Time Period field. More than one decade can be selected from the controlled vocabulary.

> *1860s (1860-1869)*
> *1850s (1850-1859); 1860s (1860-1869)*

If the coverage is unknown, enter Undated.

Subject

Subject headings and Name Authority Records are taken from the Library of Congress Subject Headings (LCSH) and National Authority File (LCNAF). Both can be searched through the Library of Congress Authorities website.

> Library of Congress Authorities: https://authorities.loc.gov/

Record four to eight subject headings in alphabetical order. Subjects should reflect the topics discussed or mentioned in a document. These commonly include, but are not limited to: persons, events, organizations, government and military offices, professions or trades, objects, social, ethnic, and racial identifiers, laws and legal statuses, economic terms, services and infrastructure, and ideas or concepts. General descriptive terms for locations, such as "Plantations--Mississippi" or "Farms", can be recorded in the Subject field. Specific geographic locations, such as names of towns and counties, should be recorded in the Mississippi County and Geographic Location fields (discussed later in this guide).

The subject heading *Mississippi. Governor* is assigned to all documents.

Some subject headings appear on the Library of Congress Authorities website with a period at the end of the heading. In most instances, this terminal period should be removed when the heading is entered in the Subject field. (See below for exceptions to this rule). **Only remove periods at the end of subject headings.**

> **Original Heading with End Period:** *Confederate States of America. Army.*
> **Updated Heading without End Period:** *Confederate States of America. Army*
>
> **Original Heading with End Period:**
> *Confederate States of America. Army. Alabama Infantry Regiment, 15th.*
> **Updated Heading without End Period:**
> *Confederate States of America. Army. Alabama Infantry Regiment, 15th*

There are a few exceptions to the above rule. Do not remove terminal punctuation from subject headings that end with abbreviations, open date ranges, or parentheses. Examples:

> *McCardle, William H.* (Keep the ending . after the middle initial)
> *United States--Centennial celebrations, etc.* (Keep the ending . after etc)
> *Speed, Frederic, 1841-* (Keep the ending -)
> *Mississippi State Penitentiary (Jackson, Miss.)* (Keep the closing parenthesis)

The Subject field is a controlled vocabulary. Separate multiple entries with a semicolon. Remove the semicolon that follows the last entry.

Confederate States of America. Army; Military deserters; Mississippi. Governor; Pettus, John Jones, 1813-1867

Mississippi. Governor; Mississippi. Militia; Pettus, John Jones, 1813-1867; Plantation owners Bread; Corn; Mississippi. Governor; Pettus, John Jones, 1813-1867; Poverty

Mississippi county

The Mississippi County field indicates the county in Mississippi that the item is about. Use this field only if the content of the item is about Mississippi. **If the item is not about Mississippi, leave blank.**

The county should be taken from the Library of Congress Subject Headings (LCSH) and National Authority File (LCNAF).
Lamar County (Miss.)
Hinds County (Miss.)

The Mississippi County field is a controlled vocabulary field. Separate multiple entries with a semicolon. Remove the semicolon that follows the last entry.

https://authorities.loc.gov/

Geographic location

The Geographic Location field indicates the location that the item is about, other than the Mississippi county. It can be used to enter a city, region, state, county, or county for a state other than Mississippi.

If the geographic location is not known, leave the field blank. An item can have both the Mississippi county and a geographic location, if the information is known.

The geographic location should be taken from the Library of Congress Subject Headings and National Authority File (NAF).
Hattiesburg (Miss.)
Atlanta (Ga.)
Mobile County (Ala.)
Georgia
Brazil

https://authorities.loc.gov/

The Geographic Location field is a controlled vocabulary field. Separate multiple entries with a semicolon. Remove the semicolon that follows the last entry.

Resource type

The Resource Type field indicates the format of the original item. Use more than one term if needed, listing them in alphabetical order.

Image refers to photographs or illustrations, not the digital image of a text document. Use both Text and Image for items that contain text and photograph(s).

Typically, letters will be listed as Text.

The resource type field is a controlled vocabulary field. Separate multiple entries with a semicolon. Remove the semicolon that follows the last entry.

Image
Interactive Resource [web pages]
Moving Image
Physical Object
Sound
Still Image
Text

Format

Format provides information about the format, dimensions, and length of the document. Fill in [x] based on the height and width of the item, and if applicable, the number of pages of the original item in its physical form.

Documents should include height, width, and number of pages.

Digital reproduction of a [x]" x [x]" [x]-page document.
Digital reproduction of an 8" x 10" 6-page document.

Media format

Media Format indicates the format of the original item. It is more specific than the Resource Type field. This field is not visible in the public web interface and is used to build searches

Image refers to photographs or illustrations, not the digital image of a text document. Use both Text and Image for items that contain text and photograph(s).

The resource type field is a controlled vocabulary field. Separate multiple entries with a semicolon. Remove the semicolon that follows the last entry.

Audio
Cartoon
Document Film
Illustration Image
Map
Newspaper
Object

Oral history
Page from publication Publication
Scrapbook
Text
Video
Website

Typically, letters will be listed as Document.

Language

Enter the Language for all documents, including those in English. Leave this field blank for documents for which Language does not apply, such as a photograph. For documents in a language other than English, enter the language.

Language code

Enter the language code for all documents, including those in English. Leave this field blank for documents for which Language does not apply, such as a photograph.

Language codes are expressed in compliance with the international standard ISO 639-2. Language codes are typically a three-letter code.
        e.g., *eng* for English

All ISO 639-2 language codes can be found here: https://www.loc.gov/standards/iso639-2/php/code_list.php.

This field is hidden from the public interface.

Publisher

The publisher field indicates the party responsible for the electronic publication of each item.

Every item will have a publisher of the electronic version. The home repository is listed first, followed by the MDL. Both terms should have the (electronic version) designation.
        Mississippi Department of Archives and History. (electronic version);
        Mississippi Digital Library. (electronic version)

The Publisher field is a controlled vocabulary field (standardized text, but not associated with an authority record). Separate multiple entries with a semicolon. Remove the semicolon that follows the last entry.

Contributors

The information in this field gives credit to other parties that contributed to the publication of the item. Separate multiple entries with a semi-colon. Example:

Funding for this project provided by The Dale Center for Study of War and Society.

Notes

The Notes field is visible in the public web interface, so only include notes that are suitable for public viewing. There is also a hidden notes field for technical or administrative notes. The Notes field is not a controlled vocabulary.

The Notes field has been used to identify items as part of CWRGM project.

This item is part of the Civil War and Reconstruction Governors of Mississippi Project.; https://cwrgm.org/

Rights

Each item in Digital Collections is required to have a disclaimer and a rights statement in its metadata. The corresponding copyright statement should be entered into the rights field and the standard disclaimer in the disclaimer field.

The corresponding copyright statement should be entered in the rights field. Statements should be formatted as Title; URI (i.e. IN COPYRIGHT; http://rightsstatements.org/vocab/InC/1.0/).

I. IN COPYRIGHT
- URI: http://rightsstatements.org/vocab/InC/1.0/
- To be used for items we know are under copyright, and we know who owns said copyright.

II. IN COPYRIGHT - RIGHTS-HOLDER(S) UNLOCATABLE OR UNIDENTIFIABLE
- URI: http://rightsstatements.org/vocab/InC-RUU/1.0/
- To be used for items we know are under copyright, but we do not know who owns said copyright or we know who owns the copyright, but we do not have contact information.

III. NO COPYRIGHT – UNITED STATES
- URI: http://rightsstatements.org/vocab/NoC-US/1.0/
- To be used for items we know are in the public domain.

IV. NO COPYRIGHT – CONTRACTUAL RESTRICTIONS
- URI: http://rightsstatements.org/vocab/NoC-CR/1.0/

- To be used for items with no copyright restrictions, but contractual obligations, such as needing permission from the donor.

V. COPYRIGHT NOT EVALUATED
- URI: http://rightsstatements.org/vocab/CNE/1.0/
- To be used for items we have not yet attempted to determine copyright status. Should be used as a temporary statement.

VI. COPYRIGHT UNDETERMINED
- URI: http://rightsstatements.org/vocab/UND/1.0/
- To be used for items we cannot determine copyright status due to missing information such as not knowing the creator or creation date.

VII.NO KNOWN COPYRIGHT
- URI: http://rightsstatements.org/vocab/NKC/1.0/
- To be used for items we are reasonably sure have no copyright, but cannot conclusively state "No Copyright".

For the majority of CWRGM letters the following rights statement can be entered:

NO COPYRIGHT - UNITED STATES; http://rightsstatements.org/vocab/NoC-US/1.0/

Disclaimer

This field provides a copyright disclaimer. Enter:

Use of materials from this collection beyond the exceptions provided for in the Fair Use and Educational Use clauses of the U.S. Copyright Law may violate federal law. Permission to publish or reproduce is required.

Contributing institution

This field identifies the repository where the item is owned and housed. The contributing institution field is a controlled vocabulary. Enter:

Item housed at Mississippi Department of Archives and History.

Collection

This field identifies the collection of which the item is a part. In the example below, xxx equals the Governor's name and yyy is the Series number. There is a period at the end of this statement, and no comma between the collection number and the title. The Collection field is a controlled vocabulary

xxx yyy.
Pettus Series 757.

Source

The Source field gives the physical location of the item within the collection of which it is a part.
Box 5, Folder 7

Digital repository

This field identifies the digital repository to which the item belongs. All items should include the Digital Repository. The Digital Repository field is a controlled vocabulary. Enter:

Mississippi Digital Library.

Digital collection

This field identifies the digital collection to which an item belongs. All items should include the Digital Collection. The Digital Collection field is a controlled vocabulary. Enter:

Mississippi Department of Archives and History.

Date digital

The Date Digital field indicates the date that the item was digitized. This field is formatted as a date type field and has the same formatting requirements as the Date Searchable field. This field is not visible in the public web interface.

Enter the date the file was created in YYYY-MM-DD format. Example:
2020-06-01

Capture method

The Capture Method field indicates the method of digitization. If known, the scanner or camera used for digitization should be selected from the controlled vocabulary. For USM collections, the controlled vocabulary includes hardware in the USM Digital Collections lab. This field is not visible in the public web interface.

The Digital Collections staff at USM will complete the Capture Method field.

Processing software

The Processing Software field indicates the software used to process images, such as Adobe Photoshop CS5. This field is a controlled vocabulary. This field is not visible in the public web interface.

The Digital Collections staff at USM will complete the Processing Software field.

Master image

The Master Image field indicates the file extension and resolution of the master image. This field should be used only if the information about the master image is known. This field is a controlled vocabulary. This field is not visible in the public web interface.

300 dpi TIFF

Record created by

The Record Created By field indicates which user created the record. This field is not visible in the public web interface.

Enter your full name. Separate multiple entries with a semicolon.

Hidden notes

The Hidden Notes field is a searchable field that is not visible in the public web interface, and it includes any notes not intended for public view. Enter:

Needs Transcript

Custom searches

The Custom Searches field is used strictly for building custom searches. The field has a controlled vocabulary and is not visible from the public web interface. Enter:

cwrgm

IP resolution

The IP Resolution field (intellectual property resolution) is used to manage permissions and copyright. The field has a controlled vocabulary and is not visible from the public web interface. Based on the contents of this field, the permissions may be set to restrict the item from public view.

For CWRGM letters, enter:
> *Permission Granted*

Transcript

The Transcript field is used to upload full-text transcripts of select documents.

The Digital Collections staff at USM will complete the Transcript field as necessary for all materials.

File name

Enter the filename for the item (should match the identifier) including the file extension.
Example:
> *mdah_757-930-06-10*

Student workers drafting or first reviewing metadata should leave this field blank.