Metadata Guidelines for Encoding Descriptive Records for the Lower Roxbury Black History Project records

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Introduction

These guidelines are intended to aid in the construction of descriptive metadata records for the Lower Roxbury Black History Project's oral histories and related audiovisual, textual, and photographic materials. The materials were created by Lolita Parker, Jr. under the auspices of Northeastern University and deposited in the Archives and Special Collections in 2009.

The descriptive metadata records are encoded using MODS v.3.4[1], and detailed definitions of elements and attributes for the MODS standard can be found in the MODS User Guidelines v.3[2]. Use the MODS template to create each new record. Each record should have a `<mods:mods>` wrapper and should be valid according to the MODS schema. If a field in the template is not needed for a record, do not leave it blank; delete it from the record.

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[1] http://www.loc.gov/standards/mods/mods-outline.html
[2] http://www.loc.gov/standards/mods/v3/mods-userguide-elements.html

Metadata Fields

Title Information

Definition: A brief descriptive statement that is used to uniquely identify the resource and its content.

Field Values: Titles for the collection-level record and its constituent parts will be created using the following format: An Interview with [Name of Interviewee, including nicknames in quotation marks if applicable], [Date of Interview] [format]. The date of the interview should be taken from the appropriate folder's name or finding aid. The format should conform with the AAT genre types: transcript, sound recording, or video recording.

If the transcript itself has a distinct title, this title can be recorded in a separate titleInfo field with the "alternative" type attribute. For resources that fall outside the parameters of an interview, create a title using information in the file/folder headings, e.g. Video of Winifred Hall Identifying Scanned Photos, April 22, 2009 [video recording].

If the title, or alternate title, has a leading articles (The, An, A), it should be removed from the beginning of the title and encoded in its own `<mods:nonSort>` field before `<mods:title>`, but within the `<mods:titleInfo>` wrapper.

Elements and Attributes:
```
<mods:titleInfo>
        Attributes: type="alternative"

        <mods:nonSort>
              Attributes: none
        <mods:title>
              Attributes: none
```

Parameters: `<mods:titleInfo><mods:title>` is repeatable, and at least one instance of `<mods:titleInfo><mods:title>` is required. Each title gets its own `<mods:titleInfo>` wrapper. `<mods:nonSort>` is only required if a leading article is present.

Examples:
```
<mods:titleInfo>
        <mods:nonSort>An<mods:nonSort>
        <mods:title>Interview with Clarence "Jeep" Jones, March 24, 2008 [sound
recording].</mods:title>
</mods:titleInfo>

<mods:titleInfo type="alternative">
        <mods:title> Interview with Alfreda Harris.</mods:title>
</mods:titleInfo>
```

Names of Creators and Contributors

Definition: Persons or entities credited with the creation of the resource being described.

Field Values: Each interview has multiple contributors. For this project, "Northeastern University (Boston, Mass.). Lower Roxbury Black History Project" is considered the creator and should not be removed from the template. There is also at least one interviewee and interviewer. Lolita Parker, Jr. is often the interviewer, but you may encounter interviews conducted by her son, London Parker-McWhorter. Select the appropriate role term from the list of authorized terms: interviewee, interviewer. Capitalize the term and do not include any punctuation in the field.

Authorized forms of the names of contributors can be found in the finding aid. Enter personal names in in-direct order (LastName, FirstName MiddleName). Nicknames should **not** be encoded in this field and will be supplied in the title and abstract information. Any dates (birth or death) associated with the name should be encoded in a separate `<mods:namePart>` field with the appropriate attribute: `type="date"`. The attribute `type="termsOfAddress"` is used to record titles and enumeration associated with a name, such as Jr., II, etc.

Elements and Attributes:
> `<mods:name>`
>> Attributes: `type="personal"`, `"corporate"`, or `"family"`
>>> `authority="local"`
>> `<mods:namePart>`
>>> Attributes: `type="date"`
>>>> `type="termsOfAddress"`
>> `<mods:role>`
>>> Attributes: none
>>> `<mods:roleTerm>`
>>>> Attributes: `authority="marcrelator"`
>>>>> `type="text"`

Parameters: `<mods:name>` is repeatable, and at least three instances of `<mods:name><mods:namePart>` are required for the creator, interviewee, and interviewer. Each name gets its own `<mods:name>` wrapper.

Examples:

```
<mods:name authority="local" type="corporate">
      <mods:namePart> Northeastern University (Boston, Mass.). Lower Roxbury
Black History Project</mods:namePart>
      <mods:role>
            <mods:roleTerm authority="marcrelator" type="text">
             Creator<mods:roleTerm>
      </mods:role>
</mods:name>
```

```
<mods:name authority="local" type="personal">
        <mods:namePart> Haynes, Michael E.</mods:namePart>
        <mods:namePart type="termsOfAddress">Reverend</mods:namePart>
        <mods:role>
                <mods:roleTerm authority="marcrelator" type="text">
                 Interviewee<mods:roleTerm>
        </mods:role>
</mods:name>

<mods:name authority="local" type="personal">
        <mods:namePart>Parker, Lolita</mods:namePart>
        <mods:namePart type="termsOfAddress">Jr.</mods:namePart>

        <mods:role>
                <mods:roleTerm authority="marcrelator" type="text">
                 Interviewer</mods:roleTerm>
        </mods:role>
</mods:name>
```

Resource Type

Definition: A term or phrase used to identify the resource's content type.

Field Values: Choose the resource type that best describes the digital object from the MODS list of acceptable values: mixed material, text, moving image, sound recording-musical, sound recording-nonmusical, or still image. Do not capitalize the term and do not include punctuation in the field.

Elements and Attributes:
```
<mods:typeOfResource>
```
>   Attributes: none

Parameters: `<mods:typeOfResource>` is required and repeatable. Each type of resource term gets its own `<mods:typeOfResource>` wrapper.

Examples:

```
<mods:typeOfResource>text</mods:typeOfResource>
```

```
<mods:typeOfResource>sound recording-nonmusical</mods:typeOfResource>
```

Genre

Definition: A word or phrase used to describe the style of the resource's content.

Field Values: Choose the genre term that best describes the genre of the digital object from the list of acceptable AAT values. For the interviews, values include: interviews, transcripts, sound recordings, and video recordings. Images are classified as black-and-white prints (photographs) or color prints (photographs). Do not capitalize the term and do not include punctuation in the field.

Elements and Attributes:

`<mods:genre>`

Attributes: `authority="aat"`

Parameters: `<mods:genre>` is required and repeatable. Each genre term gets its own `<mods:genre>` wrapper.

Examples:

`<mods:genre authority="aat">transcripts<mods:genre>`

`<mods:genre authority="aat">interviews<mods:genre>`

Dates

Definition: A date related to an event in the life of a resource, such as the date created, the date published, or the date edited.

Field Values: The date created corresponds to the date of the original interview as recorded in the folder names or finding aid. The dates associated with the creation or conversion of the digital object (audio file, PDF, etc.) are recorded in the technical metadata and should **not** be encoded in this MODS record. If no date is present, do not supply one.

Many of the photographs' dates are not explicitly stated. If a date or date range is created using clues from the photograph or accompanying materials, indicate the uncertain nature of the date using a qualifier attribute and the following values:

- `"approximate:"` Dates that are unknown but can be estimated with reasonable accuracy or are preceded by circa (ca.)
- `"questionable:"` Dates that are estimated, imprecise, or followed by a "?"
- `"inferred:"` Dates that are known to be accurate but are enclosed in brackets or are taken from an outside source (such as an accompanying video or reference document).

Encode dates in W3C format (YYYY-MM-DD) and do not include punctuation other than "-". Abbreviations and punctuation that typically accompany dates, e.g. ca., ?, or brackets, should not be entered in this field. Date ranges should be entered into separate fields using the point attribute with "start" or "end" values.

Elements and Attributes:

`<mods:originInfo>`

Attributes: none

`<mods:dateCreated>`

Attributes: `encoding="w3cdtf"`
`keyDate="yes"`
`point="start"` or "end"
`qualifier="approximate"`, `"inferred"`, or `"questionable"`

Parameters: This field is repeatable and not required. All date information is contained within a single `<mods:originInfo>` wrapper.

Examples:
```
<mods:originInfo>
      <mods:dateCreated encoding="w3cdtf" keyDate="yes">2007
      </mods:dateCreated>
</mods:originInfo>

<mods:originInfo>
      <mods:dateCreated encoding="w3cdtf" keyDate="yes" point="start">
       1940</mods:dateCreated>
      <mods:dateCreated encoding="w3cdtf" point="end">
       1950</mods:dateCreated>
</mods:originInfo>

<mods:originInfo>
      <mods:dateCreated encoding="w3cdtf" keyDate="yes"
       qualifier="approximate">1967</mods:dateCreated>
</mods:originInfo>

<mods:originInfo>
      <mods:dateCreated encoding="w3cdtf" keyDate="yes" qualifier="inferred">
       1938</mods:dateCreated>
</mods:originInfo>
```

Physical Description

Definition: A description of the form, quality, type, extent, or origin of the resource.

Field Values: Use reasonable judgment to determine the form of the image and select the most appropriate term from the MARC Form of Item Term List: braille, electronic, microfiche, microfilm, print, large print. For this collection, the value will always be "`electronic`". The digital origin of an image must be selected from the MODS list of acceptable values: born digital, reformatted digital, digitized microfilm, digitized other analog. For the interview collection, the value will always be "`born digital`". For accompanying photographs, the value will be "`reformatted digital`."

The length of audio and video files should be encoded in the `<mods:extent>` child element. Even though an authority cannot be specified in this field, the extent should follow the ISO 8601 format: hh:mm:ss.

You may include an optional notes element to record information reflecting the condition of the digital object. For transcripts, noting whether or not the transcript is edited, unedited, or partial would be useful information for the user. You may also want to note the quality of the audio and video recordings, i.e. if the audio is too low; the speakers are inaudible; or if there is no audio associated with a video.

Elements and Attributes:

```
<mods:physicalDescription>
        Attributes: none
        <mods:form>
                Attributes: authority="marcform"
        <mods:digitalOrigin>
                Attributes: none
        <mods:extent>
                Attributes: none
        <mods:note>
                Attributes: none
```

Parameters: This field is repeatable and not required. All physical description information is contained within a single `<mods:physicalDescription>` wrapper.

Examples:

```
<mods:physicalDescription>
        <mods:form authority="marcform">electronic</mods:form>
        <mods:digitalOrigin>born digital</mods:digitalOrigin>
        <mods:note>This is an unedited transcript.</mods:note>
</mods:physicalDescription>

<mods:physicalDescription>
        <mods:form authority="marcform">electronic</mods:form>
        <mods:digitalOrigin>born digital</mods:digitalOrigin>
        <mods:extent>01:37:15</mods:extent>
</mods:physicalDescription>
```

Abstract

Definition: A description of the item's content.

Field Values: Use reasonable judgment and reliable resources, such as the finding aid and related materials in the collection, to create a brief description of the digital object. Include any important information here that is not recorded elsewhere, including the interviewee's role in the Lower Roxbury community and the project's parameters.

Elements and Attributes:

```
<mods:abstract>
        Attributes: none
```

Parameters: This field is recommended and not repeatable.

Examples:

```
<mods:abstract> An interview with Byron Rushing, civil rights activist and
Massachusetts State Representative. Rushing describes the early history of
```

African American settlement and immigration in Greater Boston. This interview was collected as part of Northeastern University's Lower Roxbury Black History Project (1992-2007) to record the oral history of the African American community in Lower Roxbury.</mods:abstract>

Access Condition

Definition: Information about restrictions imposed on access to a resource.

Field Values: Not all interviews are accompanied with the appropriate use agreements, and this information should be encoded in the <mods:accessCondition> element with the appropriate type: "restrictions" or "use and reproduction." A restrictions statement reflects conditions governing access (unrestricted or restricted due to missing permissions). A use and reproduction statement includes known copyright information.

Elements and Attributes:
<mods:accessCondition>
　　　Attributes: type="restrictions", "use and reproduction"

Parameters: This field is repeatable and required. Restrictions on access and use/reproduction notes should be encoded in separate <mods:accessCondition> fields.

Examples:

<mods:accessCondition type="restrictions">This interview is unrestricted.</mods:accessCondition>

<mods:accessCondition type="restrictions">This interview is restricted. Please contact the University Archivist for more information.</mods:accessCondition>

<mods:accessCondition type="use and reproduction">Some copyright restrictions may apply.</mods:accessCondition>

Notes

Definition: Valuable information about the resource that cannot be sufficiently encoded in another field.

Field Values: Create a note for the recommended citation of the digital object. For this collection, the citation will be:
　　　[Identification of material], Lower Roxbury Black History Project records, 1992-2007 (M165), Archives and Special Collections Department, Northeastern University Libraries, [Box #], [folder #].
If the audio and video files do not have a corresponding box or folder number, reference the external hard drive on which they are stored.

Elements and Attributes:

> `<mods:note>`
>
>> Attributes: `type="citation"`
>>
>> Attributes: `displayLabel="Recommended Citation"`

Parameter: Note fields are recommended and repeatable. Each note gets its own `<mods:note>` wrapper. If additional note fields are deemed necessary as this project progresses, define a new type for each note.

Examples:

> `<mods:note displayLabel="Recommended Citation">An Interview with Alfreda Harris [video recording], Lower Roxbury Black History Project records, 1992-2007 (M165), Archives and Special Collections Department, Northeastern University Libraries, Box 3, EH2.</mods:note>`

Subjects

Definition: Terms used to identify the content of the resource.

Field Values: Many of the Library of Congress Subject Headings and authorized personal names for this collection can be found in the finding aid. In addition to the topical, geographic, and genre-specific headings supplied in the template, create a personal name entry for each record following the guidelines below.

Existing subject headings may not apply to all interviews or photographs added to the collection, e.g. "oral history." "African American women – Massachusetts – Boston" would also apply to some interviews and not others. An index of possible subject headings is included at the end of these guidelines.

Elements and Attributes:

> `<mods:subject>`
>
>> Attributes: `authority="lcsh"` or `"local"`
>>
>> `<mods:topic>`
>>
>>> Attributes: `authority="lcsh"`
>>
>> `<mods:geographic>`
>>
>>> Attributes: `authority="local"`
>>
>> `<mods:temporal>`
>>
>>> Attributes: `encoding="w3cdtf"`
>>>
>>> Attributes: `point="start"` or "end"
>>
>> `<mods:name>`
>>
>>> Attributes: `type="personal"` or `"corporate"`
>>>
>>> `<mods:namePart>`
>>>
>>>> Attributes: `type="date"`
>>
>> `<mods:genre>`
>>
>>> Attributes: none

Parameters: `<mods:subject>` and its constituent fields are repeatable and optional, but at least one topical term or personal name is recommended. Each subject term and its subdivisions gets its own `<mods:subject>` wrapper.

Examples:
```
<mods:subject>
      <mods:name type="personal" authority="local">
            <mods:namePart>Warren, Joseph David</mods:namePart>
            <mods:namePart type="date">1938-</mods:namePart>
      </mods:name>
</mods:subject>

<mods:subject>
      <mods:topic authority="lcsh">African American
neighborhoods</mods:topic>
      <mods:geographic authority="local">Massachusetts</mods:geographic>
      <mods:geographic authority="local">Boston</mods:geographic>
</mods:subject>

<mods:subject>
      <mods:genre>Oral history</mods:genre>
</mods:subject>

<mods:subject>
      <mods:geographic authority="local">Roxbury (Boston, Mass.)
      </mods:geographic>
</mods:subject>
```

Related Resource

Definition: A related resource is an entity that has a relationship to the resource being described.

Field Values: The related resource field will be used to represent relationships between the multiple parts (audio, video, textual, and photographic files) and the intellectual whole.

The collection-level record should include related items with the type attribute "`constituent`" for each piece of the interview, as well as a related item element with the type attribute "`host`" for the finding aid. The title, type of resource, physical description, and identifier elements are all repeatable within the related item wrapper and should be encoded following the applicable rules laid out in these guidelines.

The individual audio, video, transcript, and image records will point back to the collection-level record with the type attribute "`host`," but you do not need to create relationships between all of the alternate formats.

For select video records with an original physical format (MiniDVs), an additional related item will need to be created with a type attribute of "`original`." The `<mods:physicalLocation>` should be encoded as: `Lower Roxbury Black History Project records, 1992-2007 (M165), Archives and Special Collections Department, Northeastern University Libraries, Box 3.` If a MiniDV does not exist for a video, you may delete the related item from the template.

Elements and Attributes:

```
<mods:relatedItem>
        Attributes: type="host" or "constituent" or "original"
                <mods:titleInfo>
                        Attributes: none
                                <mods:title>
                                        Attributes: none
                <mods:typeOfResource>
                        Attributes: none
                <mods:physicalDescription>
                        Attributes: none
                        <mods:form>
                                Attributes: authority="local" or "marcform"
                        <mods:extent>
                                Attributes: none
                <mods:identifier>
                        Attributes: none
                <mods:location>
                        Attributes: none
                        <mods:physicalLocation>
                                Attributes: none
```

Parameters: Related item fields are required and repeatable.

Examples:

```
<mods:relatedItem type="host">
      <mods:titleInfo>
              <mods:nonSort>An<mods:nonSort>
              <mods:title>Interview with Clarence "Jeep" Jones, March 24,
2008</mods:title>
      <mods:titleInfo>
</mods:relatedItem>

<mods:relatedItem type="constituent">
      <mods:titleInfo>
              <mods:nonSort>An<mods:nonSort>
              <mods:title>Interview with Clarence "Jeep" Jones, March 24, 2008
[video recording]</mods:title>
      <mods:titleInfo>
      <mods:typeOfResource>moving image</mods:typeOfResource>
      <mods:physicalDescription>
              <mods:form authority="marcform">electronic</mods:form>
              <mods:extent>01:23:37</mods:extent>
      </mods:physicalDescription>
      <mods:identifier>Jones_Clarence_Audio_20080324</mods:identifier>
</mods:relatedItem>
```

Library of Congress Subject Headings

Topical Terms
African American neighborhoods – Massachusetts – Boston
African American women – Massachusetts – Boston
African American youth – Massachusetts – Boston
African Americans – Massachusetts – Boston – Economic conditions
African Americans – Massachusetts – Boston – Social conditions
Civil rights – Massachusetts – Boston
Community development, Urban – Massachusetts -- Boston

Geographic Terms
Roxbury (Boston, Mass.)
Boston

Genre Terms
Oral history

Personal Names
*

Corporate Names
[Not necessary?]

Allowed Subdivisions
Massachusetts -- Boston[LCSH]