

Metadata Worksheet Instructions

Part 1: Fields

1. In the first column of the spreadsheet, list labels for all fields. Organize the field labels in the order that they should appear to the patron. (Note: Each collection should include a collection field which identifies the grouping of items.)

Answer questions 2-11 for each field. Record your answers in the spreadsheet.

2. Will some of the entries in this field come from a controlled vocabulary or authority record?
 - a. If yes, create a "group label":

Examples:

LCSH Subjects: (group label)
Songs with piano

Author Information: (group label)
Mark Twain
1835 – 1910
American

- b. How do you want the group labels and field names to display? Your options are:

- i. Group labels only

Examples:

Author Information: (group label)
Mark Twain
1835 – 1910
American

LCSH Subjects: (group label)
Songs with piano

- ii. Field names only

Examples:

Author: Mark Twain
Author's Dates: 1835 – 1910
Author's Nationality: American

Subject: Songs with piano

- iii. Group labels and field names

Examples:

Author Information: Mark Twain
Author: Mark Twain
Author's Dates: 1835 – 1910
Author's Nationality: American

LCSH Subjects: Songs with piano
Subject: Songs with piano

3. Will this field be grouped with other fields for display purposes?
 a. If yes, create a "group label" that describes the grouped fields as a unit.

Example:

Scale & Coordinates:	(group label)
Center Point Longitude:	-105 39 07
Center Point Latitude:	40 55 08
Scale:	1:20,000

- b. How do you want the group labels and field names to display? Your options are:

- i. Group labels only

Example:

Scale & Coordinates:	(group label)
-105 39 07	
40 55 08	
1:20,000	

- ii. Field names only

Example:

Center Point Longitude:	-105 39 07
Center Point Latitude:	40 55 08
Scale:	1:20,000

- iii. Group labels and field names

Example:

Scale & Coordinates:	
Center Point Longitude:	-105 39 07
Center Point Latitude:	40 55 08
Scale:	1:20,000

4. Is this a repeating field?

- a. Create a "group label" for the repeating field

Example:

Creators:	(group label)
Creator:	Martin Schwartz
Creator:	R. L. Johnson

- b. For display purposes, do you want the field name to repeat each time?

- i. Field name appears once

Example:

Creator: Martin Schwartz, R. L. Johnson

- ii. Repeating field names

Example:

Creator:	Martin Schwartz
Creator:	R. L. Johnson

5. What kind of information will be stored in the field? Choose one of the following options:

- a. text (alpha-numeric characters)
 b. numbers only
 c. dates

6. Is this field searchable?

7. Is the field indexed in the keyword search?

8. Is the field viewable?

Part 2: Cataloging Tool Options

9. Is this a required field in the cataloging tool?
10. Should the cataloging tool enforce unique values for this field?
For example, if this field contains a unique accession number, you may want to enforce unique values which would prevent duplicative entries.
11. If you want to link to a web site that contains additional information or cataloging rules for the field, list the URL.

Part 3: Fields Displayed Below Thumbnails

12. Browse screens and search results are returned with thumbnail views and 4 metadata fields (see illustration below). Select 4 fields to display under the thumbnail. It is recommended that you choose descriptive fields that most uniquely identify that record. List the 4 fields in the order that they should be displayed under the thumbnail. Record this information on the second sheet of the Excel spreadsheet.



Part 4: Sorting Search Results

13. Choose up to 4 fields to sort the collection. All records sharing a value in the first sorting field will be sorted by the second field, and so on. Text fields are sorted ascending alphabetically, numeric fields are sorted numerically. Record this information on the second sheet of the Excel spreadsheet.

Part 5: Choosing Quick-Search Fields

14. Quick-Search fields are prominently displayed field search options. Fields commonly searched are featured for rapid reference, saving the user the effort of hunting for the field in lengthy field lists. You may choose to have no quick-search fields or you may choose to make all fields quick-search fields. It's

recommended to choose a small number (3-5) of fields that patrons are most likely to search and designate them quick-search fields. Record this information on the second sheet of the Excel spreadsheet.

Part 6: Mapping the Metadata Template to the Getty Crosswalk

15. To ensure that cross collection searching works properly, fields in this collection need to be mapped to semantically identical (or closely related) fields in other collections. Luna uses the Getty Crosswalk to accomplish this. Please work with the Electronic Resources Cataloger to map the fields in this collection to the Getty Crosswalk.