



Orbis Cascade Alliance Content Creation & Dissemination Program Metadata Readiness Checklist

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This checklist is an aid to assess whether digital object metadata meets the **minimum requirements** set by The Orbis Cascade Alliance Dublin Core Best Practices Guidelines (DCBPG). When an OAI-PMH set of Simple Dublin Core records meets these minimum requirements, it is ready to be harvested for Alliance Primo and/or DPLA.

For more detailed metadata guidelines and to see examples of compliant metadata, view DCBPG online here:
<https://www.orbiscascade.org/dublin-core-best-practices/>

Metadata evaluation tools

<http://evaluationtools.harvester-dev.orbiscascade.org/>

Is the metadata present?

Use the **Required Data Checker** to find out. Provide a valid OAI-PMH base URL, then choose a set. The Required Data Checker will parse the entirety of an OAI set looking for records that are missing required or recommended fields. The result table is ordered by the number of missing fields per record.

Is the metadata mapped and formatted correctly?

Review a set's metadata with the **Dublin Core Mapping Checker**. Provide a valid OAI-PMH base URL, then choose a set to get a table of simple Dublin Core fields arrayed left to right, with "required" fields listed first, then "recommended" ones. This is intended as a means to see what kinds of data is mapped to each field, to catch mapping errors, and to identify data for cleanup in the local repository.

Minimum requirements

Date (dc:date)

Ready:

- All records contain a dc:date (can be verified with the Required Data Checker)
- The date for harvest is the 1st instance of dc:date output (visible in the OAI-PMH output)
- All dates for harvest are formatted according to ISO:8601, EDTF level 0 or 1, or W3CDTF (view and evaluate with the Mapping Checker)
- For more detailed metadata guidelines and to see examples of compliant metadata, view DCBPG online here: <https://www.orbiscascade.org/dublin-core-best-practices/>

Ready	Noncompliant
1977-04-01	April 1, 1977 04/01/1977 April 1st 1977
1842-12	December 1842
<p><i>Format approximate and uncertain dates by following the date with a tilde or question mark:</i> 1900~ 1900? 19.</p>	<p><i>Use circa or square brackets to approximate dates:</i> circa 1900 c. 1900 1900 (circa) 1900 ca. ca. 1900 [1900]</p>
<p><i>Estimate dates with date ranges:</i> 1900/1925 1975/1999</p>	<p><i>Approximate time periods with “early” or “late”:</i> early 1900s late 1900’s</p>
<p><i>Define centuries and decades with date ranges or “u” (unspecified):</i> 1900/1999 19uu 1950/1959 195u</p>	<p><i>Define centuries and decades with the presence of “s” or “th century”:</i> 1900s 20th century 1950s</p>
<p><i>Estimate a date or date range:</i> 1826/1899</p>	<p><i>Use “undated”, “n.d.”, or “unknown”</i></p>
<p><i>The date to be harvested (the record’s first date) should be a single date or date range. If the date to be harvested contains multiple dates, convert to a date range using EDTF notation.</i> 1900/1901 1900~ 190u 1950/1957</p>	<p><i>Separate multiple dates with a character other than a semicolon:</i> 1900 or 1901 1950 & 1957</p>

Identifier (dc:identifier)

Ready:

- All records contain a record URI (a URL pointing to a single record) in dc:identifier. Your digital asset management system (DAM) or institutional repository (IR) creates this value automatically. (presence can be verified with the Required Data Checker, values can be viewed and evaluated with the Mapping Checker)
- For more detailed metadata guidelines and to see examples of compliant metadata, view DCBPG online here: <https://www.orbiscascade.org/dublin-core-best-practices/>

Rights (dc:rights)

Ready:

- All records contain 2 rights statements in dc:rights: 1 standardized RightsStatements.org URI and 1 free-text rights statement.
- For more detailed metadata guidelines and to see examples of compliant metadata, view DCBPG online here: <https://www.orbiscascade.org/dublin-core-best-practices/>

Ready	Noncompliant
Rights transferred to Pine State University Libraries. For permissions, please contact http://lib.pinestate.edu/admin/rightsmanagement	For permission to publish, please contact Pine State University Libraries at (555) 222-1234
http://rightsstatements.org/vocab/InC-EDU/1.0/	

Title (dc:title)

Ready:

- All records contain a value in dc:title (presence can be verified with the Required Data Checker)
- For more detailed metadata guidelines and to see examples of compliant metadata, view DCBPG online here: <https://www.orbiscascade.org/dublin-core-best-practices/>

Type (dc:type)

Ready:

- All records must contain at least one DCMI Type Vocabulary term in dc:type. It should be distinguished from non-DCMI Type values with a semicolon delimiter or a separate field. (presence can be verified with the Required Data Checker, values can be viewed and evaluated with the Mapping Checker)
- For more detailed metadata guidelines and to see examples of compliant metadata, view DCBPG online here: <https://www.orbiscascade.org/dublin-core-best-practices/>

Ready	Noncompliant
Text; Masters theses Text	thesis
Image Image; StillImage Image; Photographs StillImage; Photographs Image; StillImage; Photographs	photograph

The next 3 fields are not required. But if present, they should be formatted as specified in Alliance Dublin Core Best Practices Guidelines

Contributor (dc:contributor)

Ready: dc:contributor is not present in any records (presence can be verified with the Required Data Checker)

- or -

Ready: dc:contributor is present in one or more records, and all of these contributor values conform to RDA guidelines on recording attributes of persons, families, and corporate bodies (as outlined in RDA chapter 8). (presence can be verified with the Required Data Checker, values can be viewed and evaluated with the Mapping Checker)

For more detailed metadata guidelines and to see examples of compliant metadata, view DCBPG online here:

<https://www.orbiscascade.org/dublin-core-best-practices/>

Ready	Noncompliant
<p><i>Format names as Last name, First name, Middle name:</i> Francone, Clarice Ashworth</p>	<p><i>Format names as First name, Middle name, Last name:</i> Clarice Ashworth Francone, illustrator</p>
<p><i>Separate each contributor with a semicolon:</i> Addams, Jane, 1860-1935; Smith, Mary Rozet, 1863-1934</p>	<p><i>Separate multiple contributors with characters other than semicolons:</i> Addams, Jane, 1860-1935 or Smith, Mary Rozet, 1863-1934</p>

Creator (dc:creator)

Ready: dc:creator is not present in any records (presence can be verified with the Required Data Checker)

- or -

Ready: dc:creator is present in one or more records, and all of these creator values conform to RDA guidelines on recording attributes of persons, families, and corporate bodies (as outlined in RDA chapter 8). (presence can be verified with the Required Data Checker, values can be viewed and evaluated with the Mapping Checker)

For more detailed metadata guidelines and to see examples of compliant metadata, view DCBPG online here:

<https://www.orbiscascade.org/dublin-core-best-practices/>

Ready	Noncompliant
<p><i>Separate each creator with a semicolon:</i> Lillard, Damian; McCollum, C.J.; Plumlee, Mason</p>	<p><i>Separate multiple creators with characters other than semicolons:</i> Damian Lillard or C.J. McCollum or Mason Plumlee</p>
<p><i>Format names as Last name, First name, Middle name (or middle initial and period). If birth and death dates are known, follow the name with a comma, space, birth year, hyphen, and death year:</i> Aggens, Steffen H., 1834-1888 Salisbury, Albert P., 1904-</p>	<p><i>Format names as First name, Middle, Last name:</i> Steffen H. Aggens, 1834-1888 Albert Salisbury</p>
<p><i>The presence of "unknown" is allowed, but it will be stripped out by the Alliance harvester:</i> unknown</p>	

Language (dc:language)

Ready: If dc:language is not present in any records (presence can be verified with the Required Data Checker)

- or -

Ready: dc:language is present in one or more records, and all of these language values are present as ISO 639-2 three letter codes or as language names as they appear in ISO 639-2 (presence can be verified with the Required Data Checker, values can be viewed and evaluated with the Mapping Checker)

For more detailed metadata guidelines and to see examples of compliant metadata, view DCBPG online here:

<https://www.orbiscascade.org/dublin-core-best-practices/>

Ready	Noncompliant
eng English	en

Metadata Readiness Worksheet

Use of this worksheet is optional, and intended to help Alliance libraries with the local process of identifying and preparing sets for central aggregation.

Collection Name _____

Number of Records _____

Dublin Core Element	Ready	Pending	No-go	Notes (include plans for remediation)
Date				
Identifier				
Rights				
Title				
Type				
Contributor				
Creator				
Language				

Ready: Records comply with the DCBPG minimum requirements and are ready for harvest.

Pending: Records require cleanup to meet DCBPG minimum requirements. Include basic remediation plan under “Notes”.

No-go: The cleanup required to meet DCBPGs minimum requirements is not possible, practical, or is otherwise prohibitive.