
**APPENDIX 3. WASHINGTON COUNTY HERITAGE ONLINE
TRAINING MANUAL**

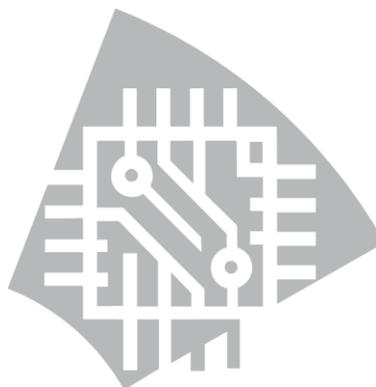


Training Manual

Version 2.0, updated September 2012



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Metadata Quick Start Guide

This information is here as a guide to the minimum requirements needed to add items to WCHO. All of the fields listed on this page also have more detailed entries in the cataloging guide. There are 25 total fields for WCHO – only the 9 listed below are required for submission. Be sure to read the cataloging guide so that you know all of your options.

Required fields to be entered

For all other fields enter only if information is known, otherwise leave blank or set to the default setting.

- Identifier
- Title
- Description
- Digital Publisher
- Type
- Date digital
- Digitization specifications
- Cataloged by
- Cataloged date

Identifier:

This is the same as the base of your file names.

Examples: PUApic_008001
WCMtxt_ms45

Title:

Sentence case. Stay under 30 characters when possible. No period necessary at end of title.

Examples: Portrait of George Atkinson
Main Street, Forest Grove, Oregon, 1986
Smith, George. Letter to John Smith

Description:

No format. Use full sentences and punctuation.

Examples: Two unidentified female Pacific University students playing badminton in front of McCormick Hall, 1913.
Letter from George Smith to his brother John Smith. In the letter, he is requesting that his brother join him in Oregon.

Digital Publisher:

The name of the entity submitting the item to WCHO. If an individual, use Library of Congress Authority format/entry.

Example: Pacific University Archives
Washington County Museum

Type:

Use DCMI Type Vocab [more at: <http://dublincore.org/documents/dcmi-type-vocabulary/>]

Common Terms:
Still Image
Text

Date Digital:

The date the item was digitized. Use W3C standard, YYYY-MM-DD.

Digitization Specifications:

For item in brackets, enter the actual dpi of the TIFF. Make sure to change this statement to reflect the equipment you are using.

Scanned at [#] dpi using an Epson v700 scanner. Images enhanced in Photoshop CS5. Saved at the highest resolution TIFF and as a derivative JPEG.

Catalogued By:

The initials of the person who wrote the metadata, no punctuation.

Catalogued Date:

The date the metadata was written. Use W3C standard, YYYY-MM-DD.

Best Practices Guide

Washington County Heritage Online



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Last Revised:
August 2012

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Purpose

This best practices guide has been created by the members of Washington County Heritage Online (WCHO) project. One of the goals of WCHO is to create a standard for digitization and metadata that can be used by institutions throughout Washington County (and Oregon). The following guidebook will help you to understand the rationale behind the chosen standards, and will aid you as you contribute historic materials to the project.

Background

Washington County Heritage Online is a collaborative project between historical and cultural institutions in Washington County, Oregon. Founded in 2011, it seeks to document the unique heritage of Washington County. At this stage, we are seeking to collect, digitize and display photographs and textual items of historic importance. Washington County Heritage Online principally wants to:

- collect items of historical and cultural importance
- celebrate local history
- encourage cooperation between archives, historical societies, libraries, museums, and other cultural organizations
- allow for wider access to the unique materials found in Washington County
- train contributors to adhere to standards that create consistency and allow for WCHO to contribute to regional and national projects

After consulting with citizens of Washington County and reading several histories, professionally created or otherwise, we were able to compile a list of topics which would be pertinent to cover for WCHO. We encourage you to do this for your own organization; each institution will know best what events, people, and activities are most important to represent. Below is a list of possible topics:

- Agricultural history
- Women's suffrage
- Prohibition
- Missionary activities
- Urbanization
- Leisure activities (bands, sports teams, fraternal organizations etc.)
- Pioneer heritage
- Military activities

Scanning Standards

The following charts outline **the minimum requirements** for digitization of images and text items. These standards were derived from American Library Association, Western States Digital Standards Group, National Archives and Records Administration, and Library of Congress best practices.

Creating Derivate files

- Each photo will be scanned to create a Master file (preservation copy) in the TIFF format. That preservation copy will then be opened in Photoshop (or similar photo editing program), where it will be edited and then saved as second file in TIFF format. There will then be a raw Master TIFF (the preservation copy) and an enhanced TIFF (cleaned up for online viewing).
- A derivative file, optimized for viewing online, will be created using imaging software. It is not necessary to rescan items to create derivatives. The derivative file will be made from the edited TIFF, not the raw Master TIFF.
- For text items, you may use this method of creating a TIFF and a derivative file. If you do not want to go through this process for your text items, you may scan your items and create PDF files. These PDF files are not recommended for digital preservation surrogates, but will be perfectly acceptable for online and reference use.

The following is a chart of basic guidelines for creating TIFFs for multiple item types – more specific guidelines for photographs, slides, and text items are on the following pages:

	Min. Resolution	Minimum Color	Notes for creation of preservation TIFF
Printed Materials (standard books, pamphlets, etc.)	300 dpi	Grayscale OK; capture in color if possible	Use higher resolution (400-600 dpi) if the text is very small or if there are illustrations.
Manuscripts / Rare Books	400 dpi	Color	Use higher resolution (600+ dpi) if the text is very small or hard to read.
Photographs	400-600 dpi	Color; Grayscale is OK for black & white photos	400 dpi is usually fine; You may need a higher resolution (600+ dpi) for small photographs. The final image should measure at least 6000 pixels on the longest side.
Slides/negatives	600 dpi	Color for color slides, grayscale for black & white slides	Slides and negatives typically require a high resolution (1200+ dpi). The final image should measure at least 6000 pixels on the longest side.
Maps	300-600 dpi	Color or grayscale, depending on original	600 dpi will capture highly detailed information and is good for reprinting. Lower resolutions may be appropriate if detail is limited.

For more detailed documentation on scanning different types of materials, go to <http://connect.ala.org/node/185648> to view the Minimum Digitization Capture Recommendations developed by the Preservation and Reformatting Section of the Association for Library Collections and Technical Services. **NOTE: these Guidelines have not been officially adopted by the American Library Association. This is expected to happen in the next year.**

Photographic Prints

A print of an image produced by any photographic process, either originally in black and white or in color

- Start with 600 dpi image resolution.
- If image pixel count on the longest side is smaller than 3000 pixels, double the dpi from 600 to 1200 or from 1200 to 2400, etc., to increase the pixel size to at least 3000 pixels.
- **Scan backs of print if there is information written on the back. Also scan any documents that accompany the photo.**

	Image Types	Bit Depth	Resolution (dpi)	Pixel dimension/ Image Size	File Format
Master Files	B&W, toned, and color prints	24-bit color (RGB)	600 dpi Adjust dpi to achieve 3000 pixels across the longest side; For square images try for 2700 x 2700 pixels	100% (1:1)	TIFF (uncompressed)
Derivative Files	Access	24-bit color (RGB)	150 dpi	600 pixels on the longest side	JPEG (low)

Photographic Negatives and Slides

Any image produced on a transparent plastic film or medium, either in a negative or positive color or black and white image.

- Start with 600 dpi image resolution.
- If image pixel count along the longest side is smaller than 3000 pixels, double the dpi from 600 to 1200 or from 1200 to 2400, etc., to increase the pixel size to at least 3000 pixels.

	Image Types	Bit Depth	Resolution (dpi)	Pixel dimension/ Image Size	File Format
Master File	Text on transparent media	1-bit bitonal	Adjust dpi to achieve 3000 pixels across the longest side.	100 % (1:1)	TIFF(uncompressed)
	B&W negatives & positives	8-bit grayscale	Adjust dpi to achieve 3000 pixels across the longest side.	100 % (1:1)	TIFF(uncompressed)
	Color negatives & positives	24-bit color (RGB)	Adjust dpi to achieve 3000 pixels across the longest side.	100 % (1:1)	TIFF(uncompressed)
Derivative Files	Access	1-bit bitonal 8-bit grayscale 24-bit color	150 dpi	600 pixels on the longest side	JPEG (low)

Textual Items

Any printed text, whether it is handwritten with low contrast or a high contrast text in a standard font.

- Be sure to scan all sides where writing is present
- To prevent 'bleeding through' of text from the reverse of an item, you can place archival paper between sheets of the item (as in a book or a multi-page letter, for instance)
- You may either create a high resolution TIFF and JPEG of your textual items, for preservation, or you may scan a PDF and create a digital copy which is for access and research only.

	Image Types	Bit Depth	Resolution (dpi)	Pixel dimension/ Image Size	File Format
Master Files	Manuscripts, prints, maps, other text items	24-bit color (RGB) for items with color/8-bit grayscale for items with no color/images	600 dpi (Adjust dpi to achieve 4,000 pixels across longest edge)	100% (1:1)	TIFF (uncompressed)
Derivative Files	Access size	Same as above	300 dpi	100% (1:1)	JPEG (low)
PDF Files	Access Size	Same as above	300 dpi		PDF

Metadata Guidelines

Washington County Heritage Online has based its record structure on the Dublin Core metadata schema. The collection was built through scanning the historic photos and textual items using digitization standards adapted from the standards used by leading institutions like the Library of Congress and the National Archives.

The metadata schema for Washington County Heritage Online is as follows:

WCHO Field	Maps to Dublin Core field:	Format	Example
Identifier	Identifier	WCHO File Naming Schema	PUApic_008001
Title	Title	Sentence case	The Smith family stands in front of their house
Creator	Creator	LoC Authority File or Format	Smith, A. T. Brown, Charles L.
Description	Description		The five members of the Smith family of Forest Grove stand in front of their house, 1880s.
Extent	Extent		12 pages
Transcription	Description	Do not use quotation marks. Use single quotes instead.	Charles Smith A.T. Smith Katherine Smith Sally Smith William Smith outside the house in 1913
Contributors	Contributors		John Milton, photographer
Digital Publisher	Publisher		Pacific University Library
Subject.Topic	Subject	Library of Congress Subject Headings	Students College trustees
Subject.Place	Subject	Uses names taken from Oregon Geographic Names	Hillsboro, Oregon Buxton, Oregon
Subject.Person	Subject	Use Library of Congress Authority File or AACR2 format	Smith, A. T.
Subject.Theme	Subject	Subject terms taken from the American History and Life database	State & Local History
Language	Language	Use ISO639-2 MARC code list for languages	[eng] = English [spa] = Spanish
Rights & Usage	Rights	WCHO Copyright	Online access to this

		boilerplates	image is for research and educational purposes only. To inquire about permissions, order a reproduction, or for more information, please contact [institution name and point of contact information].
Type	Type	DCMI Type vocabulary	Still Image
Date.Created	Date-Created	W3C date standard for specific dates	circa 1900s 1903-09-18
Date.Range	Coverage.Temporal	Date	1890-1899 1987 1800-1899
Format.Original	Format-Medium	AAT Vocabulary	photographic prints slides
Shelf.Location	Source		RG.124
Source	Source		Photo Collection, Pacific University Archives
IsPartOf	IsPartOf		Sidney Harper Marsh Collection
Date.Digital	[none]	W3C date standard	2011-09-08
Digitization Specifications	[none]	You may adjust this based on what you actually use.	Scanned at [#] dpi using an Epson V700. Images enhanced in Photoshop CS5. Saved as the highest resolution TIFF and also a derivative JPEG.
Catalogued By	[none]	Initials in all-caps	LAP
Catalogued Date	[none]	W3C date standard	2011-09-10

***REQUIRED FIELDS**

Example Metadata Records



Field	Metadata
Identifier	PUApic_008608
Title	A new class of Native American students pose for a picture
Creator	
Description	New students at the Forest Grove Indian Training School, posing as a group. The eleven children are dressed in traditional Native American clothing. See also: PUApic_008035.
Extent	
Transcription	Davidson, Photo. Davidson, Photo, No. 43. New Recruits---Spokane Indians. Portland, Oregon.
Contributors	
Digital Publisher	Pacific University Library
Subject.Topic	Indians of North America Students Vocational education Acculturation Off-reservation boarding schools Fashion
Subject.Place	Forest Grove, Oregon
Subject.Person	Davidson, I. G.
Subject.Theme	History of the Americas Native American Studies United States History Western United States History
Language	[eng]
Rights & Usage	Online access to this image is for research and educational purposes only. To inquire about permissions, order a reproduction, or for more information, please contact the Pacific University Archives at archives@pacificu.edu.
Type	Still Image
Date.Created	1880-1885
Date.Range	1880-1885
Format.Original	photographic prints
Shelf.Location	

Source	Photo Image Collection, Pacific University Archives
isPartOf	
Date.Digital	2011-07-28
Digitization Specifications	Scanned at 600 dpi using an Epson V700. Images enhanced in Photoshop CS5. Saved as the highest resolution TIFF and also a derivative JPEG.
Catalogued By	EAV
Catalogued Date	2011-08-01

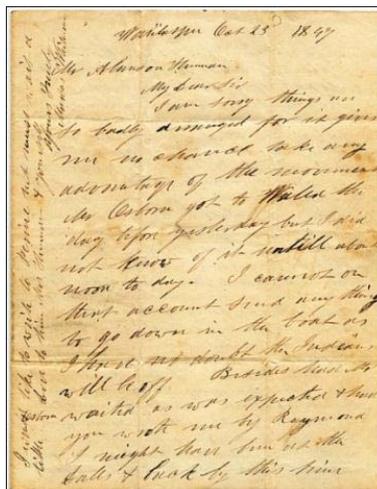
Example Two



Field	Metadata
Identifier	WCMpic_000045
Title	Robert Weatherred, High Jump
Creator	
Description	A young man, Robert Weatherred, in white shorts and tank-top is attempting a high-jump while a number of men and boys watch in a grassy field.
Extent	
Transcription	Robert Weatherred doing jump
Contributors	
Digital Publisher	Washington County Museum
Subject.Topic	Athletics Jumping
Subject.Place	Hillsboro, Oregon
Subject.Person	Weatherred, Robert
Subject.Theme	Art & Entertainment Local & State History Social History
Language	[eng]
Rights & Usage	Online access to this image is for research and educational purposes only. To inquire about permissions, order a reproduction, or for more information, please contact the Washington

	County Museum at Librarian@WashingtonCountyMuseum.org.
Type	Still Image
Date.Created	circa 1930s
Date.Range	1930-1939
Format.Original	photographic prints
Shelf.Location	
Source	Robert L. Benson Research Library, Washington County Museum
isPartOf	
Date.Digital	2011-07-28
Digitization Specifications	Scanned at 600 dpi using an Epson v700 scanner. Images enhanced in Photoshop Elements. Saved at the highest resolution TIFF and as a derivative JPEG.
Catalogued By	LMD
Catalogued Date	2011-09-01

Example Three



Field	Metadata
Identifier	PUAman_MS69
Title	Letter, Marcus Whitman to Alanson Hinman
Creator	Whitman, Marcus, author
Description	Marcus Whitman writes to Alanson Hinman about his trials and tribulations as a missionary and doctor among the Native Americans. This letter was written roughly one month before the Whitman Massacre.
Extent	4 pages
Transcription	
Contributors	
Digital Publisher	Pacific University Archives
Subject.Topic	Missionaries Indians of North America
Subject.Place	Waiilatpu, Washington
Subject.Person	Whitman, Marcus

	Hinman, Alanson
Subject.Theme	Social History
Language	[eng]
Rights & Usage	Online access to this image is for research and educational purposes only. To inquire about permissions, order a reproduction, or for more information, please contact the Pacific University Archives at archives@pacificu.edu.
Type	Text
Date.Created	1847-10-23
Date.Range	1847
Format.Original	letters
Shelf.Location	MS.69
Source	Pacific University Archives
isPartOf	Marcus Whitman letters to Alanson Hinman
Date.Digital	2012-06-22
Digitization Specifications	Scanned at 600 dpi using an Epson v700 scanner. Images enhanced in Photoshop Elements. Saved at the highest resolution TIFF and as a derivative JPEG.
Catalogued By	LPZ
Catalogued Date	2012-08-17

Project Glossary

Administrative metadata: n. Data that is necessary to manage and use information resources and that is typically external to informational content of resources. Administrative metadata often captures the context necessary to understand information resources, such as creation or acquisition of the data, rights management, and disposition.

Anglo-American Cataloging Rules 2: n. (AACR2) A standard for creating library catalog records, especially library collections, including the consistent description of those materials and the formation and assignment of access points under which those descriptions are arranged.

Archives: n. 1. Materials created or received by a person, family, or organization, public or private, in the conduct of their affairs and preserved because of the enduring value contained in the information they contain or as evidence of the functions and responsibilities of their creator, especially those materials maintained using the principles of provenance, original order, and collective control; permanent records. 2. The division within an organization responsible for maintaining the organization's records of enduring value. 3. An organization that collects the records of individuals, families, or other organizations; a collecting archive. 4. The professional discipline of administering such collections and organizations. 5. The building (or portion thereof) housing archival collections. 6. A published collection of scholarly papers, especially as a periodical.

Archival Image: an image held within an archive. The image tends to be in its original form.

Compression: n. A process that reduces the amount of space necessary for data to be stored or transmitted.

Art and Architecture Thesaurus: n. (AAT) A controlled vocabulary that includes terms useful for describing and indexing collections of fine art, architecture, decorative arts, archival materials, and material culture. Created by the Getty Research Institute.

DCMI: (Dublin Core Metadata Initiative) The Dublin Core Metadata Initiative is an open organization engaged in the development of interoperable metadata standards that support a broad range of purposes and business models. DCMI's activities include work on architecture and modeling, discussions and collaborative work in DCMI Communities and DCMI Task Groups, annual conferences and workshops, standards liaison, and educational efforts to promote widespread acceptance of metadata standards and practices.

CONTENTdm: is digital collection management software that allows for the upload, description, management and access of digital collections. It is Unicode and Z39.50 compatible. CONTENTdm can handle documents, PDFs, finding aids (including Encoded Archival Description, or EAD), images, videos, and audio files. It can also handle content so that multipage documents, scores, or books can be uploaded and organized into chapters, books or by page number. CONTENTdm is also able to display six-sided, multidimensional objects. CONTENTdm is owned by OCLC.

Controlled Vocabulary: n. A limited set of terms and phrases used as headings in indexes and as access points in catalogs.

Descriptive metadata: n. Information that refers to the intellectual content of material and aids discovery of such materials. Descriptive metadata allows users to locate, distinguish, and select

materials on the basis of the material's subjects or 'aboutness.' It is distinguished from information about the form of the material, or its administration.

DPI (dots per inch): a measurement related to resolution. It measures the number of pixels per inch in a digital image. Generally speaking, the more pixels per inch, the higher the quality.

Dublin Core: n. (DC, abbr.) A standard (ISO 15836, ANSI Z39.85) that defines metadata elements used to describe and provide access to online materials.

ISO639-2: codes for the representation of names of languages. List controlled by the Library of Congress.

JPEG (Joint Photographic Experts Group): n. A standard (ISO/IEC 10918) that specifies a digital graphic file format that can reproduce a large color space and that can compress the data to minimize the file size.

Library of Congress Authority File: The Library of Congress has a vocabulary for more than just subjects. The Library of Congress Authorities, as the collective group is known, includes the Subject Headings, Name Authorities, and the Thesaurus of Graphic Materials. For this project, we will use the Subject Headings (LCSH) and the Name Authority File (LCNAF), if it is available. If the Name is not included, we will use the LCNAF format.

Library of Congress Subject Headings (LCSH): n. A controlled vocabulary typically used to provide topical access points for catalog records.

MARC: n. A data communications format that specifies a data structure for bibliographic description, authority, classification, community information, and holdings data.

Metadata: n. A characterization or description documenting the identification, management, nature, use, or location of information resources (data).

Pixels: n. 1. An element in an array that forms an image. 2. A unit of measure used to describe the size or resolution of an image.

Metadata harvesting: Enables uses of data objects by organizations and services other than the creator/owner, and allows for objects to be shared within a larger community. For example, our metadata is harvestable so that it can eventually be incorporated into the library catalog WorldCat and projects like the Oregon Digital Library.

Oregon Geographic Names: a book produced by the Oregon Historical Society. It includes a complete listing of geographic locations in Oregon's history. The full citation is: MacArthur, Lewis A. and Lewis L. MacArthhur. *Oregon Geographic Names*, 5th Edition. Portland, OR: Oregon Historical Society Press, 2003.

Resolution: n. A measure of the sharpness and detail in an image or optical system.

TIFF (Tagged Image File Format): n. A standard (ISO 12234-2) for storing a raster graphic and metadata that describes the image content and characteristics.

W3C: The World Wide Web Consortium (W3C) is an international community where Member organizations, a full-time staff, and the public work together to develop Web standards.

Taken from the Society of American Archivist's Glossary of Archives and Records Terminology.
Found at www.archivists.org/glossary.

Washington County Heritage Online Guides and Workflows

The following documents are supplied for your use when you join WCHO. These provide step by step directions for all steps of the project, including scanning, writing metadata, and uploading. The guides and workflows will duplicate some of the information in this guide. If you are missing any of these guides, or have suggestions for clarifications and/or improvements, please contact the Project Manager at lindsay.prescott@pacificu.edu.

- Metadata Quick Start Guide
- Best Practices Guide
- Collection Criteria Guide
- WCHO File Naming Schema
- Scanning Procedures
- Readyng Digital Files
- Collection Building Overview
- WCHO Cataloging Guide

Resources

American Library Association. Minimum Digitization Capture Recommendations, June 2012: <http://connect.ala.org/node/185648>.

Arizona Memory Project's Digital Project Guidelines and Metadata Guidelines: <http://azmemory.lib.az.us/cdm4/index.php#5>.

BCR's CDP Digital Imaging Best Practices v.2.0 June 2008: <http://www.bcr.org/dps/cdp/best/digital-imaging-bp.pdf>.

Dublin Core Metadata Initiative. <http://dublincore.org/>.

Getty's Art and Architecture Thesaurus: <http://www.getty.edu/research/tools/vocabularies/aat/index.html>.

Idaho Digital Memories' Metadata Best Practices: <http://idig.lili.org/node/74>.

Library of Congress Authorities and Vocabularies. <http://id.loc.gov/>.

Peterson, Kit A. (2005). *Introduction to basic measures of a digital image for pictorial collections*. Washington DC: Library of Congress. <http://www.loc.gov/rr/print/tp/IntroDgtlImage.pdf>.

Peterson, Kit A. (2004). *Digital master images – sample technical specifications for photographic collections*. Washington DC: Library of Congress. http://www.loc.gov/rr/print/tp/DgtlMastersSampleSpecsSelctdRcmndFinal7_2004.pdf.

Society of American Archivists. Glossary of Archives and Records Terminology. <http://www.archivists.org/glossary>.

Technical Guidelines for Digitizing Archival Materials for Electronic Access: Creation of Production Master Files – Raster Images, U.S. National Archives and Records Administration (June 2004). <http://www.archives.gov/preservation/technical/guidelines.html>.

Workflows

Collection Criteria Guide

Washington County Heritage Online is a collaborative project between historical and cultural institutions in Washington County, Oregon. Founded in 2011, it seeks to document the unique heritage of Washington County. In this stage of the project we are seeking to collect, digitize and display photographs and textual items of historic importance. Washington County Heritage Online principally wants to:

- collect items of historical and cultural importance
- celebrate local history
- encourage cooperation between archives, historical societies, libraries, museums, and other cultural organizations
- allow for wider access to the unique materials found in Washington County
- train contributors to adhere to standards that create consistency and allow for WCHO to contribute to regional and national projects

When choosing items, particularly textual items, it is important to consider the relative uniqueness and importance of the document to the overall history of the county. For more specific guidelines, we have highlighted a few themes and events from Washington County's history that we feel would be good contributions to the collection. This collection will of course encompass all manner of items, but the following list highlights some of the themes and topics that we would like to cover:

1. Traditional Farm Life and other Labor
 1. Fairs, festivals, etc.
 2. The transition into new types of farming
 3. The move away from agriculture
 4. Union activity
 5. Natural disasters and/or wonders - Tillamook Burn and Columbus Day Storm
 6. Document other important industries in the county, i.e. logging, nurseries, etc.
2. Oregon Women
 1. Suffrage
 2. WCTU and similar groups
 3. Political action and participation
 4. Work outside the home
3. Missionary Work
 1. Indian Training School, Forest Grove
 2. Development of Pacific University and Forest Grove
4. Urbanization/Suburbanization
 1. Politics/dissent
 2. WWI/WWII: bond drives, drafts, CCC and WPA activities
5. Leisure Activities
 1. Clubs and Groups: bands, Templars, Granges, Masons, Order of Odd Fellows
 2. Technology: electricity, phone, TV, electric rail lines, technology companies
 3. Sports and equestrian activities
6. Diversity and Growth in the second half of the 20th Century
 1. The dramatic changes in diversity and building in the post-WWII period
 2. Variety of different immigrant groups coming into the county, for differing reasons

File Naming Schema

Partner's coding:	PUA	=	Pacific University Archives
	WCM	=	Washington County Museum
	FHFG	=	Friends of Historic Forest Grove
	BHS	=	Beaverton Historical Society
	BCL	=	Beaverton City Library
	FGL	=	Forest Grove City Library
	HPL	=	Hillsboro Public Library
	CMS	=	Cedar Mill Historical Society
	CML	=	Cedar Mill Community Library
	THS	=	Tualatin Historical Society
	NPL	=	North Plains Public Library
	SPL	=	Sherwood Public Library
	TPL	=	Tigard Public Library
	TUL	=	Tualatin Public Library
	TPR	=	Tualatin Hills Parks and Recreation
	CC	=	Centro Cultural

Archives	pic	=	Photo/Image Collection
	txt	=	Textual Items

Photo/Image Collection

Number/label your photos according to whatever system you use for your collection. If you do not have an organizational system, you will want to start something so you can be sure that you will know which photo goes to which digital file in the future.

Text Collections

Use whatever identifier you have for the collection to which the item belongs, followed by a numerical sequence as you add items from that collection. This will help you locate the original file that the item lives in if you need to locate the item via the digital file in the future.

Master TIFFs

PUApic_photo#a.tif

WCMpic_photo#b.tif

PUAtxt_collection#_1a.tif

These files will simply end with the "a" or "b" designation. These indicate different parts of the object [i.e. front and back]

JPEG:

PUApic_008001ad.jpg

WCMtxt_MS1_003d.jpg

PUAtxt_MS5_005ad.pdf

Add a "d" to denote the derivative file

Add an "h" to denote the high-resolution image that has been corrected in Photoshop

TIFFs

PUApic_008001ah.tif

PUApic_008001bh.tif

WCMtxt_ms5_002ah.tif

File Making Schema Template

Structure:

iiipic_#####sf.ext

iii = three letter institution code
pic = denotes that the file is a picture/image
= The accession number, cataloging number, etc. used by your institution. Be sure to add leading zeroes in order to insure that your file names have the same character numbers throughout this process
S = side of the photo. For the image of the front, put "a" on the end. For the back, if you scan it, put "b." Even if you only scan the front, you must still put the "a."
F = file type. For the Master TIFFs, nothing will be added. For edited TIFFs, an "h" will be added to the end. For the Access Size JPEGs, a "d" will be added.

iiitxt_###_##Pf.ext

iii = three letter institution code
txt = denotes that the file is text based
= The accession number, cataloging number, etc. used by your institution.
= number assigned to individual item within the collection
P = part of the object. Use 'a,' 'b,' 'c,' etc. to denote each part of an item
F = file type. For the Master TIFFs, nothing will be added. For edited TIFFs, an "h" will be added to the end. For the Access Size JPEGs or PDFs, a "d" will be added.

Examples:

PUApic_008001a.tif

The Master TIFF of the front side of photo 8001 from Pacific University's collection

WCMpic_012003b.tif

The Master TIFF of the back side of photo 12003 from WCM's collection

PUApic_008001ah.tif

The TIFF of the front side of photo 8001 from Pacific University's collection, which has been edited in Photoshop

WCMpic_012003bh.tif

The TIFF of the back side of photo 12003 from WCMs collection, which has been edited in Photoshop

PUApic_008001ad.jpeg

The Access Size JPEG of the front side of photo 8001 from Pacific University's collection

WCMpic_012003bd.jpeg

The Access Size JPEG of the back side of photo 12003 from WCM's collection

PUAtxt_MS1_005a.tif

The Master TIFF for the front page of the fifth item added from manuscript group 1

WCMtxt_MS6_003ad.pdf

The access size PDF for the front of the third item added from manuscript group 6

WCHO Scanning Procedures

Preparation before scanning

Preparing work space

1. Prepare work spaces and surfaces before beginning.
2. Clear working space around scanning area of objects, especially those that could mark or damage the materials.
3. Clean area before removing documents for scanning with canned air and brush.
4. Clean scanner bed with soft anti-static cloth and compressed air. Make sure any residue, especially sticky residue, has been removed completely before setting items on bed.

General Guidelines for safe handling of archival items

1. No food or drink is allowed near the work area.
2. Wash hands before handling materials.
3. Do not use pens, markers, or sharp objects near the materials.
4. Do not use rubber bands, paper clips, or self-sticking notes on the materials.
5. Don't slide documents around on top of each other because they may abrade or damage each other.
6. Don't lift documents tightly by their edges.
7. Don't fold or roll documents to make them easier to handle, or close scanner top to flatten items.

Safe Handling of documents and flat materials

1. Use lint-free cotton gloves when handling vulnerable documents.
2. Keep original items on a flat, well-supported surface. Do not place items on your lap or let them hang off the side of a table.
3. Support fragile paper documents by placing a piece of stiff archival board behind them, if necessary, and to aid in turning them over.
4. Do not stack objects of varying sizes or weights. Do not make stacks too high.

Safe Handling of Photographs

1. Do not touch the surfaces of photographic emulsions.
2. Wear clean, lint-free cotton gloves when handling photographs and film transparencies.
3. Do not try to flatten curled or curved photographs.

Flatbed Scanning Procedures

- **Be sure to scan all sides of documents where relevant writing is present. Also be sure to scan any separate documents which describe or identify objects/people in the photo.**
- **This guide shows you how to scan using an EPSON scanner. If you are using your own equipment, please consult your scanner's guide and make sure you comply with the guidelines listed here.**
- If the matting of a photo is too big to scan, but the image itself will fit on the scanner, scan the item and crop around the image alone. Then be sure to note that it is a photo on matting in the metadata.
- If the only writing on the back of the photo is information from the museum/archive/etc. and is simply for organizational purposes (such as accession numbers, ID numbers, etc.), do not worry about scanning the back. This information will be in the metadata anyway.
- Do not allow items to hang off side of scanning area without a support.
- Do not remove items that are encapsulated in a frame etc.

1. Open **EPSON Scan** on the desktop.
2. Before you start, check scanner setting.
 - Set scanner on **Professional Mode**
 - **Document Type:** "Reflective" for non-transparent media.
"Film with Film Area Guide" for negatives and transparent media.
 - **Auto Exposure Type:**
 - **Photo:** photographs & historical handwritten/typed documents (w/ stains, discoloring).
 - **Transparent items:** Choose B&W Negative or Color Negative.
 - At the bottom of the window, click on **Configuration:**
 - Select the Color tab.
 - Select either ICM or ColorSync.
 - For the Target, select **ColorMatch RGB**.
 - If **Colormatch RGB** profile is unable to sync, select **No Color Correction**.
 - Refer to **Best Practices Guide** for bit depth, Resolution (dpi), pixel size and file type to use.
 - Adjust dpi if necessary to meet the minimum pixel length standard.
 - To find the pixel size, check the lower left corner of the Preview window after you do the Preview scan.
3. **Setting filename and saving instructions:**
 1. Click the icon next to the Save button on the lower right of the toolbox menu.
 2. Click **Browse** and select the location of where to save items. You should have a folder with three folders within it: Master TIFFs, TIFFs and Access Size. Save scans in the Master TIFFs file. Save PDFs in the Access Size folder.
 3. Create a file name using the **WCHO File Naming Schemas** sheet or create a placeholder filename while scanning and adjust the names later.
 - i. Filenames may need to be adjusted after scanning. Most scanner programs will automatically numbered -01, -02 and those number need to be deleted

Positioning items:

1. For negatives:
 - i. Remove white cover on top lid.
 - ii. Use correct size film holder and place negative face down.
 - iii. Position tray so that corner white triangle is touching top/right triangle on scanner.
2. For photos:
 - i. Lay item flat in center of scanner.
 - ii. Do not try to force items flat.
 - iii. If item will not flatten, use a white archival board to lightly hold over item while scanning.
3. For text items:
 - i. Only invert books smaller than 8.5" x 11"
 - ii. Never force the spine of a book open
 - iii. support the pages with your whole hand with lifting a manuscript or turning the pages of a book
 - iv. Support items with a stiff archival board if they are larger than the scanner bed

Preview item:

1. Click **Preview** to do a preview scan of the item
2. Check position of item so that all edges are visible with a slight margin, if not, carefully reposition item and preview again.
3. Select the part of the scan that you want included in the file
 - v. For documents and prints allow for a slight margin around entire document.
 - vi. For negatives, select visible area.
 - vii. Don't worry about being too careful; you can crop and straighten in Photoshop later
4. Click on **Scan** and save to **Master TIFF** folder
 - a. If doing a **PDF**, save the PDF to the Access Size folder

Readying Images

1. Adjust filename
 - a. Refer to the **WCHO File Naming Schemas** if needed
 - b. Remove any unnecessary numbers or characters in the filename, such as "-01" or "-02" for images with multiple files attached. Add the "a", "b", etc.
 - c. For PDFs, save as PDF with correct file name. No other steps are necessary.
2. Open up file in the imaging software Photoshop.
 - a. Refer to **Readying Digital Images** for instructions.

Saving Tiffs and Access Size files

1. Make sure to refer to the **File Naming Schema** to make sure you are labeling everything correctly.
2. Save Master TIFFs with no compression.
3. For the Photoshop procedures and directions for saving the edited TIFFs and Derivative files, see the **Readying Digital Files** document. By the end you will have saved three different files: the Master TIFF, the TIFF (adjusted in Photoshop), and the JPEG.

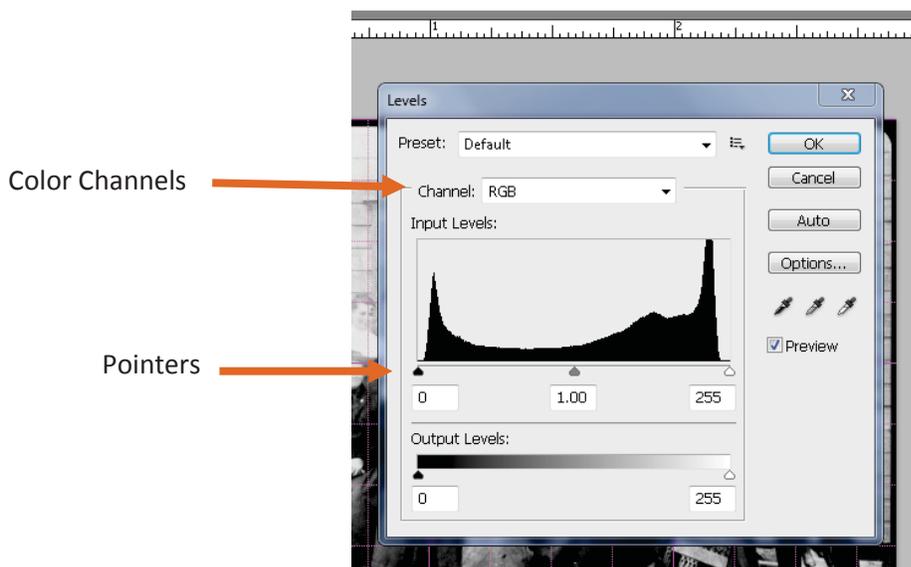
WCHO: Readyng Digital Files

Readyng Images

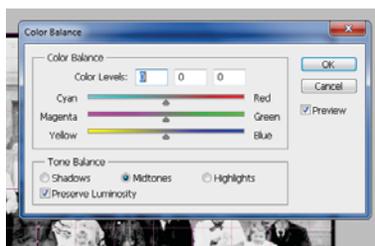
How to create TIFFs and display images using Photoshop. This guide is for Photoshop CS5. If you are using an older version of Photoshop, or Photoshop Elements, please consult the Help guide on your program for instructions on how to complete each of these steps.

Creating Tiffs

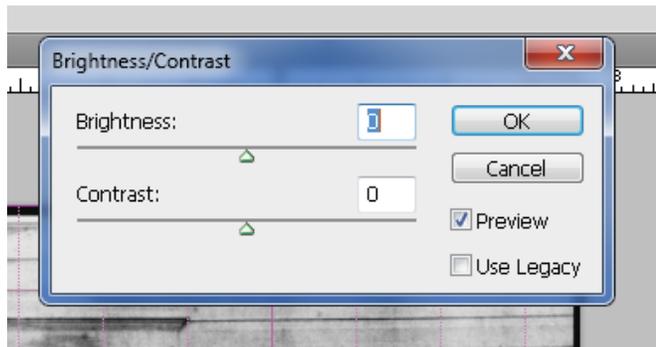
1. Open image in Photoshop.
2. For color photos or text items:
 - a. Go to **Image/Adjustment/Levels**
 - b. In **Levels**, adjust the RGB color channel so that the darks and highlights pointer is reading the histogram. If the color of the photo looks like it needs adjustment, check each color channel (Red, Green, Blue) and adjust the darks and highlights pointer so it is reading the histogram.



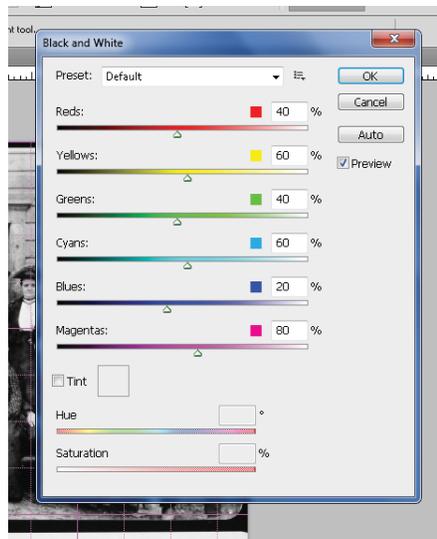
3. If necessary, also adjust lighting in **Image/Adjustments/Brightness & Contrast**
4. Check **Color Balance** for obvious color casts.
5. To adjust color, go to **Image/Adjustments/Color Balance**
 - a. Move levels to the opposite side of the color cast visible to correct.
 - b. *Avoid extreme color adjustments.*



6. For black and white photos, go to **Image/Adjustments/Brightness & Contrast**
 - a. Check the **Contrast & Brightness** and adjust as necessary



- b. You can also go to **Image/Adjustments/Black & White** and adjust levels there



7. Adjust image alignment using **Edit/Free Transform**
 - a. Make a new layer by right-clicking the background and making a copy
 - b. To gauge the alignment, use **Rulers** to pull down guides.
 - c. Find them under: **View/Rulers**
 - d. For guides, go to **View/Show/Grids**.
 - e. Rotate the layer with the dual-ended, curved arrow that appears when you hover near the bottom of the box that appears when you choose **Free Transform**
 - f. Hit Enter when you are satisfied with the image's alignment
8. For photos, crop the image so that the edge of the photo is showing. For slides and negatives, crop as close to the edge of the image as possible.
9. Anytime you do something you do not like, you can use the **History** to undo actions. Photoshop will save a list of your last 20 actions in the history panel on the right.

10. Sharpen image using **Unsharp Mask**

- a. Go to **Filter/Sharpen/Unsharp mask**
- b. Use settings: Amount 50%; Radius 0.9 pixels; and Threshold of 0.
- c. Slowly sharpen in these increments; avoid over sharpening.



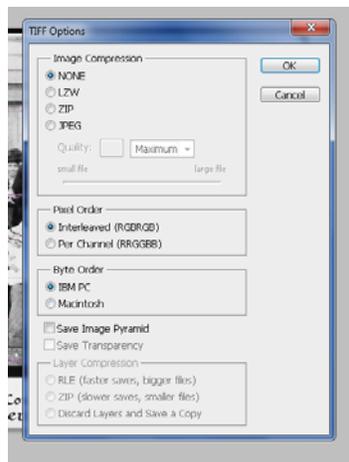
11. Save new image to the external hard drive or server you have been using.

a. File/Save as

- b. See **File Naming Schema** document for file name. Edited TIFFs should have an "h" on the end of the file name
 - i. Example: PUApic_8001ah.tif

12. Save as a Tiff with

- i. Image Compression = None
- ii. Pixel Order = Interleaved
- iii. Byte Order = IBM PC

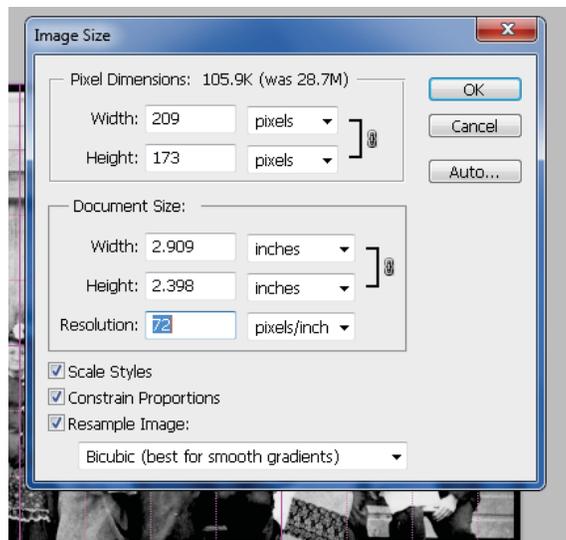


If you have created any additional layers, such as when you create a layer to do a Free Transform rotate, choose the option to “Discard Layers and Save a Copy”

Creating a Display Image

1. Change Image Size: **Image/Image Size**
 - a. Make sure Scale Styles, Constrain Proportions, and Resample Image are **all checked** before making any adjustments.
 - b. Change to **Resolution** first to 72 pixels/inch
 - c. Pixel dimensions should be 600 pixels on images longest side
 - i. **Only** go above 150 dpi if it is impossible to achieve 600 pixels along the longest size
 - ii. Once you click OK, view the re-sized image at 100% and determine if the size looks acceptable to online viewing. Adjust if necessary.

Make sure these are
ALL checked



2. Sharpen once with **Unsharp Mask** filter.
3. Save the file on the external hard drive or server you have been using.
 - a. **File/Save as**
 - b. See **File Naming Schema** document for file name. JPEGs should have an “d” on the end of the file name (for Derivative)
 - i. Example: PUApic_8001ad.jpeg

****Always use “Save As” for the TIFFs and JPEGs so you are saving a NEW file, and not saving over the Master TIFF****

Useful keyboard short-cuts:

CTRL+ Zoom In
CTRL- Zoom Out
CTRL-z Undo
CTRL-' Show Gridlines

Collection Building Overview

Before you begin

These are the minimum requirements for the CONTENTdm Project Client: Microsoft Windows® XP with SP2 or SP3 32-bit, Windows Vista 32- or 64-bit, or Windows 7 32- or 64-bit.

Understand Collections and Projects within CONTENTdm:

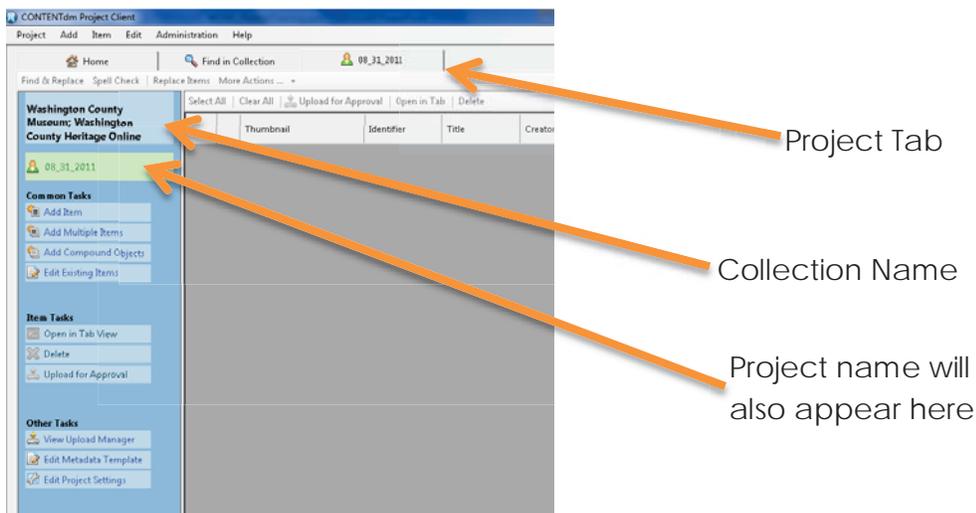
Collections: Each institution has one collection, and projects are contained in collections. Each project can contain many items, and each collection can contain many projects.

Projects: In the Project Client items are processed in a project. When a project is created, a project is linked to a single collection. You will already have a project set up; below you will learn how to add items to the project, upload items to a collection on the server, and view those items with your Web browser.

Work with a project

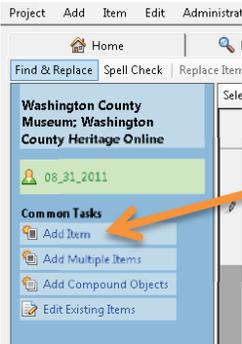
Create a new project

1. When you open the Project Client, you will have a collection for your institution set up. This collection will also already have a 'Project' for you to work in. Open your project and you can add items.



Add a single item

1. Navigate to the Home tab or Project tab.
2. On the left task pane under Common Tasks, click Add item or select Item from the Add menu. The Add Item wizard opens.
3. Click **Browse** to locate the file you want to add.
4. Click **Add** once you have selected your file.
5. A summary screen displays confirmation or any errors or warnings.
6. Click **Close**. The item is displayed in the project spreadsheet.



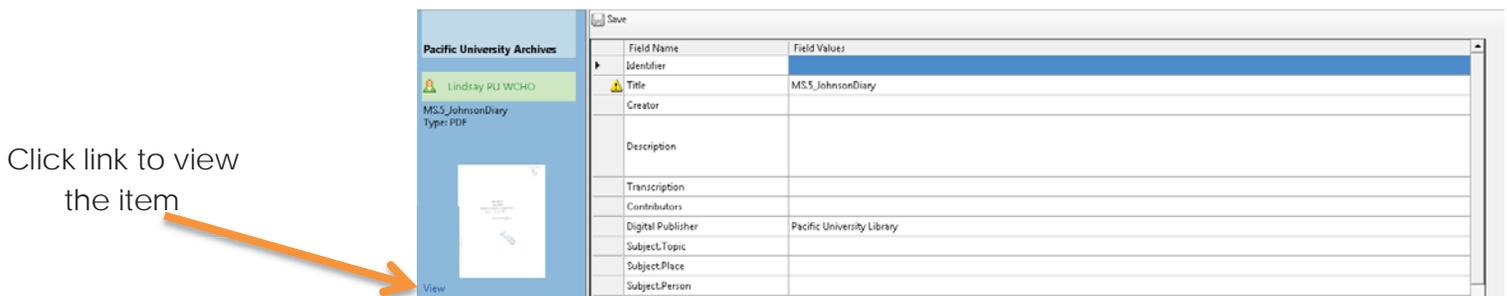
Add a single PDF file

*To view the PDF in the Project Client, confirm that Adobe Reader is installed on your machine.

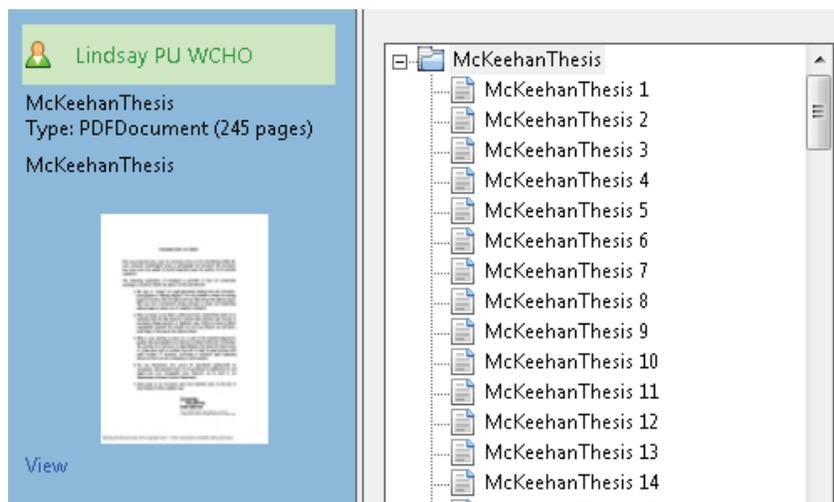
1. Confirm that the file extension is .pdf.
2. If your PDF file contains more than one page, check your project settings and make sure that PDF conversion is disabled for multiple-page PDF files. You can also choose to enable the conversion of multiple page PDFs into multiple files. See the screenshots below for more explanation about the difference between these two methods.
 - a. This setting can be turned on and off in Project>Project Settings Manager>Processing
3. Confirm that the PDF file is not encrypted or locked (If it is encrypted or locked, a thumbnail may not be generated and text is not extracted).
4. Follow the above instructions for adding an item.

*Note: You can import multiple, single-PDF files using the Add Multiple Items wizard.

When the file is added, a thumbnail is automatically generated. (Alternatively, you can use Images & Thumbnails settings to select a custom thumbnail for all PDF files.)



This is a single PDF file that is comprised of one page. Single PDF files with multiple pages will also look like this, but when you view the file all of the pages will be viewable when the user scrolls down.

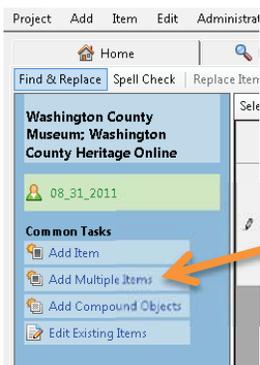


This is a single PDF file with multiple pages that has been loaded with the multiple-page PDF File Conversion setting turned on. There is a top-level for the object, but then each page of the object stands alone and can have its own metadata entry.

**You may put transcriptions in the Transcription field, which can be done using an OCR program or by hand. OCR is not available as part of the CDM Project Client. However, you may find more information about OCR software online. Many tools are available for free. WCHO staff will not be able to support your OCR software

Add multiple items (a folder-full)

1. Navigate to the Home tab or Project tab.
2. On the left task pane under Common Tasks, click Add multiple items or select Multiple Items from the Add menu. The Multiple Items wizard opens.
3. Select Import from a directory.
4. Click **Browse** to locate the directory containing the items that you want to add. Click **OK** then click **Next**.
5. Select the option to generate display images.
6. Click **Next**. The Confirm Settings screen displays. Review the settings and click Add Items or click Back to change your settings.
7. A summary screen displays confirmation or any errors or warnings.
8. Click **Close**. The items are displayed in the project spreadsheet.



Add metadata

1. Double-click a thumbnail image in the project spreadsheet. The item opens in a new tab.
2. Type your metadata into the form.

Note: When typing multiple terms in a controlled vocabulary field, separate them with a semicolon.

Note: You can also click in the spreadsheet fields and type metadata. It is up to you whether you like working in the spreadsheet view or the form view. Keep in mind that in the form you will be able to see the controlled vocabulary lists; you will not see them as you work directly in the spreadsheet.

3. When finished, click **Save** before closing the Item tab.

Spreadsheet view

Thumbnail	Identifier	Title	Creator	Description	Transcription	Contributors	Digital Publisher	Subject.Topic	Subject.Place
	WCMpic_001010	Men in a butcher shop					Washington County Museum		Yamhill County Oregon

This is the spreadsheet view, where you can double-click in the boxes and enter your metadata.

Form View

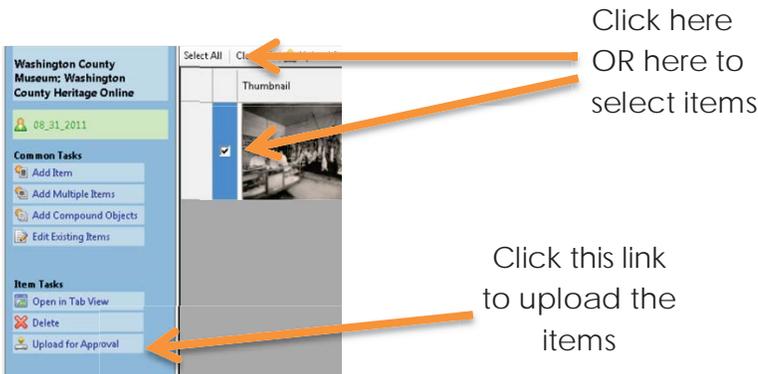
Your auto-fill fields will appear here. You will also be able to see the controlled vocabulary for a field when you click on it.

A new tab will appear with the object's title

Use these three buttons to navigate

4. On the Project tab, select the items you want to upload from the project by selecting the checkbox in each item row or click Select All.

4. Click **Upload for Approval**. Selected items are uploaded and the status bar at the bottom of the Project Client indicates progress.



3. When the upload is complete, the administrator can review the pending queue and approve the items. Erica Findley will be the administrator checking the metadata.

[View items](#)

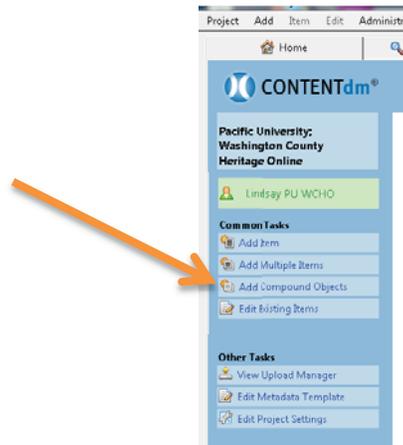
Browse collections *

1. In your browser's address bar, go to the CONTENTdm Website URL for WCHO.
2. The site is <http://washingtoncountyheritage.com>.
3. Select your institution in the Advanced Search to view only objects from your institution.

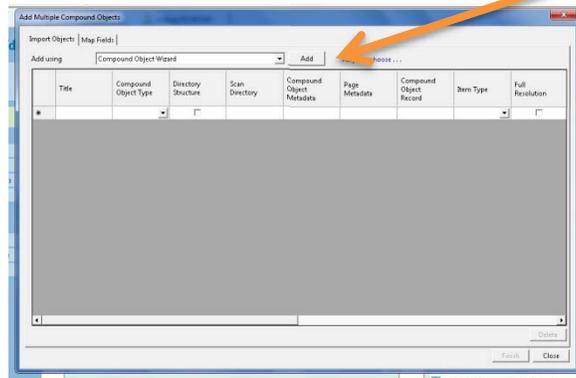
*There will be a lag between uploading for approval and the items appearing on the WCHO website.

[Adding Compound Objects](#)

1. Navigate to the Home tab or Project tab.
2. On the left task pane under Common Tasks, click **Add Compound Object** from the Add menu. The Multiple Compound Objects window opens.



3. In the Add Multiple Compound Object window, select **Add** using the **Compound Objects Wizard**.



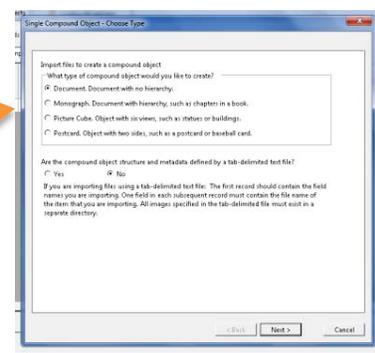
4. A window will appear. Choose the type of compound object you are going to add.

Document lets you create multiple sequential pages of a report, journal, photo album, or related image sets.

Monograph allows you to retain the hierarchical structure of documents, including sections, chapters, and pages.

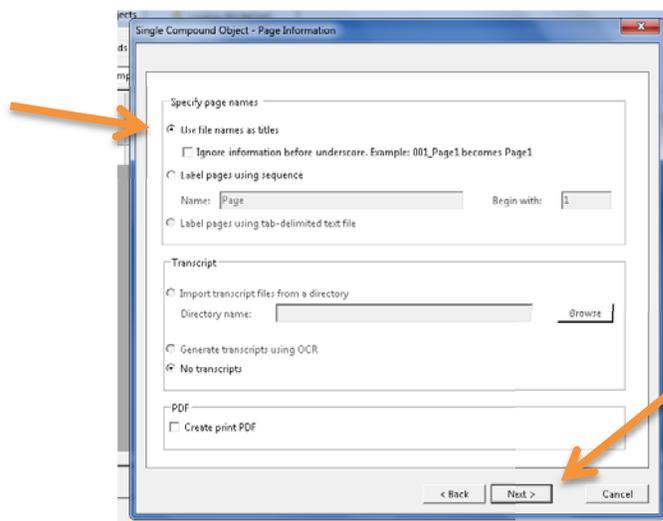
Picture Cube lets you select up to six images to link together views of a three-dimensional object.

Postcard holds both the front and back images of two-sided items, such as tickets, flyers, and baseball cards.

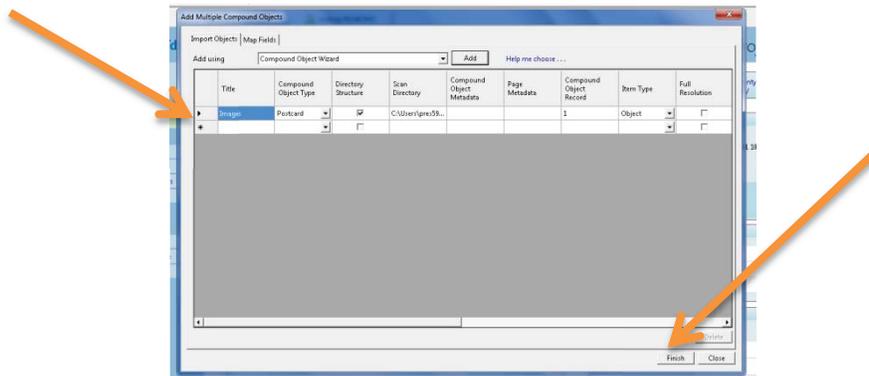


5. Click **Browse** to locate the directory containing the items that you want to add. Click **Next**. All parts of each compound object will need to be in separate folders on your computer.

6. Use the file names as titles for now. They can be changed when writing the metadata.



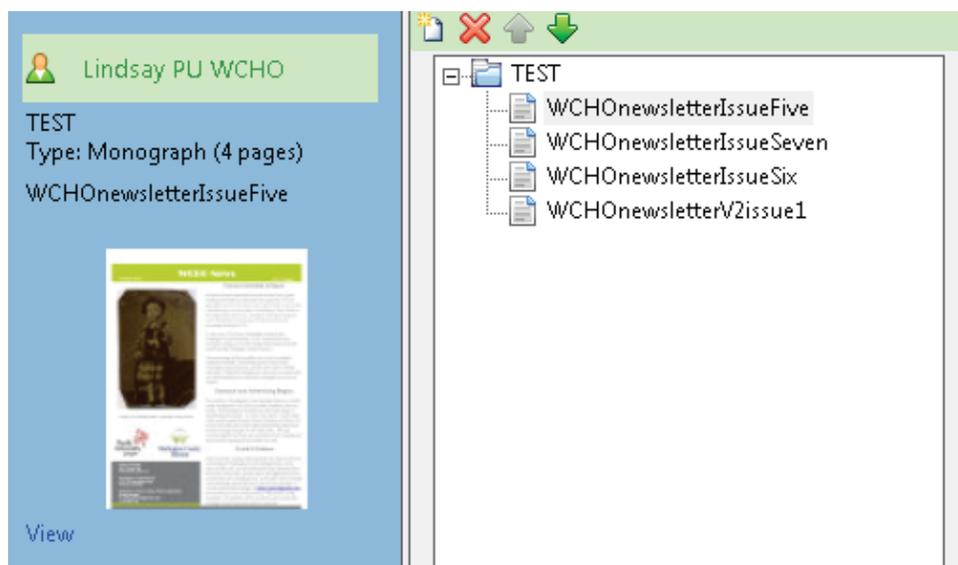
7. After clicking **Next**, the compound object will appear in the Add Multiple Compound Objects window. Repeat process as many times as needed to add more Compound Objects. Then click **Finish**.



To import a multiple-page PDF files as a compound object

1. Confirm that the file extension is .pdf.
2. Check your project settings and confirm that PDF conversion is enabled for multiple-page PDF files.
 - a. The setting is under Project>Project Settings Manager>Processing
3. Confirm that the PDF file is not encrypted or locked (if it is encrypted or locked, a thumbnail may not be generated, text is not extracted, and it is added as a single-item PDF file. You cannot create a PDF compound object from an encrypted or locked PDF file).
4. Follow the instructions for adding a compound object item.

Note: You can import a batch of multiple-page PDF files by using the Compound Object Wizard.



This is a compound object consisting of four multiple page PDFs. Each of the sections can have its own metadata, along with top level metadata for the items as a whole. For example, this is an option for items such as books, where each file could be a multi-page PDF of a chapter or section.

When the file is added, thumbnails are automatically generated (alternatively, you can use Images & Thumbnails to select a custom thumbnail for all PDF files).

** You may put transcriptions in the Transcription field, which can be done using an OCR program or by hand. OCR is not available as part of the CDM Project Client. However, you may find more information about OCR software online. Many tools are available for free. WCHO staff will not be able to support your OCR software

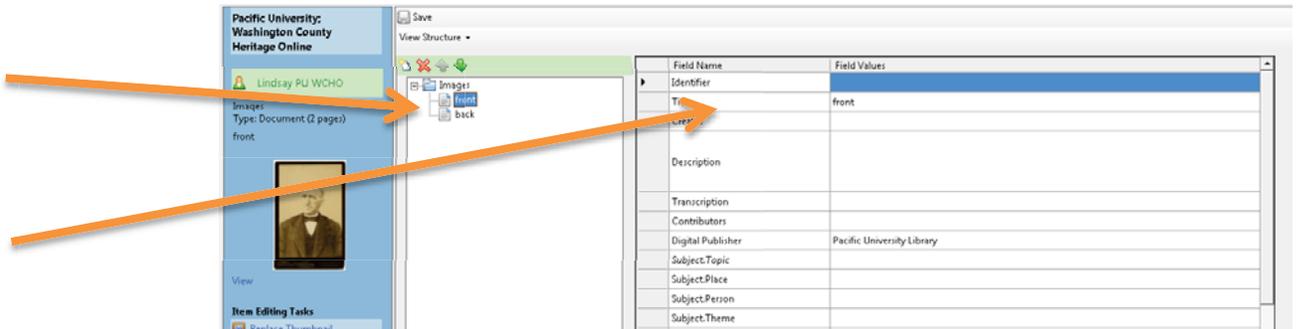
Writing Metadata for Compound Objects

1. The summary window will appear saying the objects have been uploaded. They will appear in the spreadsheet. Metadata should be written in the Spreadsheet View for Compound Objects. This is the item level metadata. In this view, you can right-click on each field and choose 'Fill Compound Object' to make sure all parts of the object have the metadata you've written attached to it.



2. If you double-click the object and enter the Form View, you can change the titles for the different parts of the object. Use 'front,' 'back,' and 'note.' If you have more than three parts, or if these terms are not applicable, write in different terms and stay consistent to the pattern you set down for yourself.

Title will need to be changed for all parts of the object. Metadata you write in the Spreadsheet View will appear on all pages of the Form View.



10. Check the box next to the objects in the Spreadsheet View once you are done writing metadata. Click **Upload for Approval**. Selected items are uploaded and the status bar at the bottom of the Project Client indicates progress.

Editing Metadata that is in CONTENTdm

Using the Project Client, you can retrieve and edit items from your CONTENTdm collection.

First, search for the items and download them from the collection into the Project Client project. Next, edit the items. Then, upload the items to the pending queue for approval and addition to the collection database.

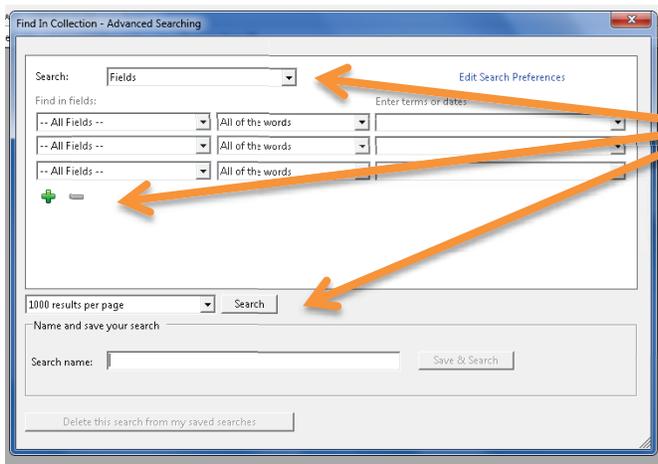
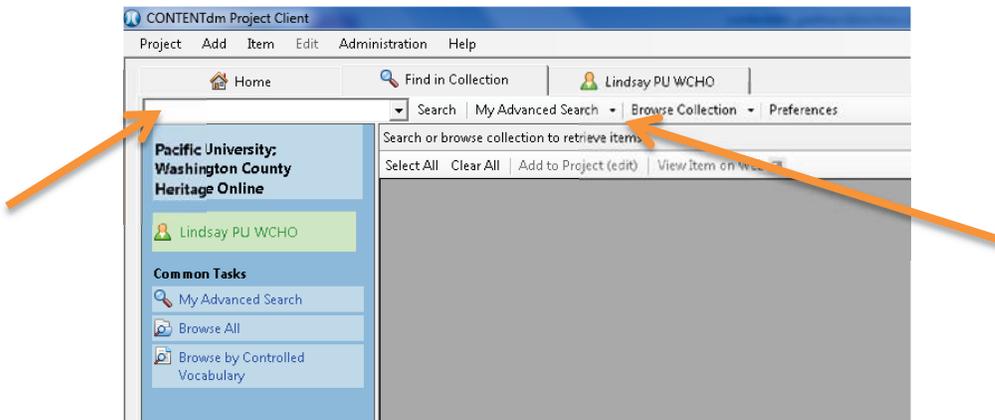
Note: When you download items from a collection into your project, the items are locked from editing by other users but are still available for viewing in the web interface.

To edit items:

1. Open the Project Client project that is associated with your collection.
2. Click the **Find in Collection** tab.



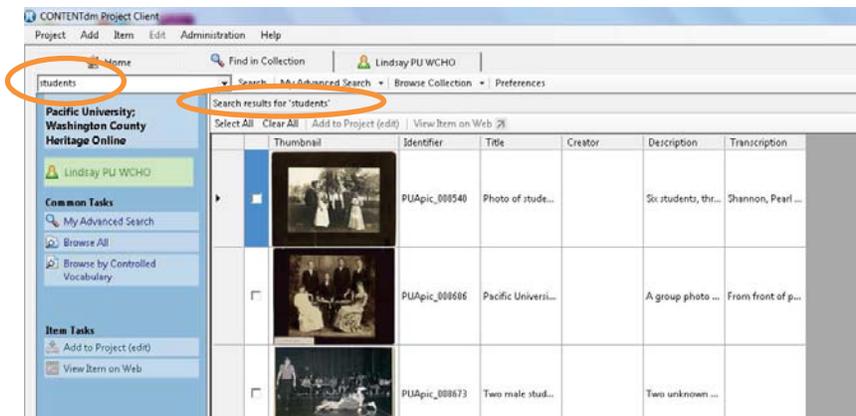
3. Browse for the items in the collection by clicking **Browse Collection** or conduct a search by typing keywords in the search box and clicking **Search** (or construct a more detailed search by clicking **Advanced Search**).



This is the Advanced Search Box. This allows a lot of customization, and you can save searches

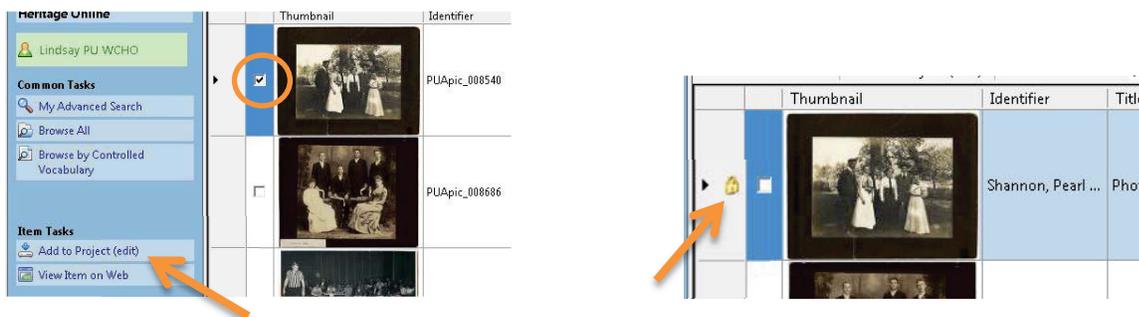
Tip: You can change the number of search results shown per page. Click the drop-down list next to the Search button to select from 100, 500, 1000 or 5000 results per page.

4. Search and browse results are displayed.



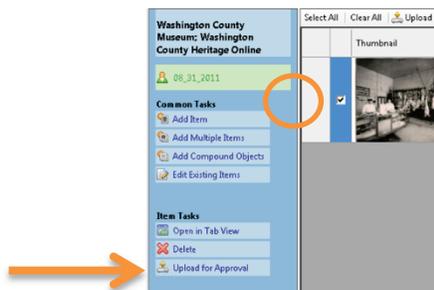
5. Locate the item(s) to edit, and select the checkbox. Then click **Add to Project (Edit)**.

The selected items are added to the Project Spreadsheet and a locked icon displays and the item rows change color on the Find in Collection tab.



Note: Although you can add more than 10,000 items at a time, we recommend downloading less than 10,000 items at a time from the server to maintain acceptable download times.

6. Click the project tab and edit the items(s). When you have finished editing the items, select the items and click **Upload for Approval**. Items will be sent to the pending queue for approval.



Editing Notes:

- If you exit the current project while still editing items, your items are saved until they are uploaded to the pending queue.
- If you download and then delete an item from your project (whether or not you make any changes), the item is unlocked and returns to its original state within the collection.

- Project additions, updates, and deletions are automatically saved to your project when you close it.

User and network support

If you have problems with CONTENTdm, please contact the support center. Only contact Erica Findley if you have problems directly related to WCHO.

Help Files: www.contentdm.org/help6/

User Support Center: www.contentdm.org/USC/

Tech Support: 1-877-797-0887

Support is available 7:00 am–9:00 pm U.S. Eastern Time, Monday through Friday.

E-mail: contentdmsupport@oclc.org

Cataloging Objects for the Washington County Heritage Online digital collection

General Notes when entering information in CONTENTdm:

1. **Replace quotation marks** within fields with apostrophes.
2. Include the file extension for the digital filenames. (.jpg)
3. Remove special characters from file names. Special characters are: \ : * ? " < > |
 - a. Special characters are OK in your metadata fields if they are necessary, such as in the transcription field

Required fields to be entered**

For all other fields enter only if information is known, otherwise leave blank or set to the default setting.

- Identifier
- Title
- Description
- Digital Publisher
- Type
- Date digital
- Digitization specifications
- Cataloged by
- Cataloged date

****Note:** The Date-Created and Date.Range fields are not required, but if you fill in one, you MUST fill in the other.

Identifier (A) REQUIRED

- An unambiguous reference to the resource conforming to a formal identification system within a given context.
- Can be the accession or catalog number assigned to the object.

Examples: PUApic_009718
WCMtxt_012031

Title (B) REQUIRED

- The collection or item-level name of a resource; a caption.
- Descriptive yet brief, no more than 30 characters when possible.
- For a text item, transcribe the title from the item itself.
- Any written evidence on the front or back of a photograph should be placed in the Transcription field.
- If no information is found, then devise a title using following format:
Format titles (*Graphic Materials* - rules 1.C.2):
 - Main Subject(s) – depicted (persons, events, activities, or objects)
 - Geographical location(s) depicted, if known and significant

- Date or date spans of what is being depicted, if different from the publication or execution dates.

Examples: New York Pilots' Association membership certificate
 Portrait of Cyrus Patten
 Gen. Emiliano Zapata and his staff, Puebla, Mexico, 1911
 Whitman, Marcus. Letter to Alanson Hinman
 Board of Trustees meeting minutes, 1922

Creator (C) OPTIONAL

- Names of persons and corporate bodies having contributed to the creation of the resource.
- Formatting: *Last name, First name, Middle name or initial. Place spaces between initials.*
- When in doubt, do not invert; give the name as it appears.
- List multiple *Creators* in order of their appearance or importance.
- Separate each entry with a semicolon.

- Include brief biographical information, if known, of birth-death dates, and function or role of the creator/contributor.

Use standardized values to indicate function:

- photographer
- editor
- illustrator
- publisher
- To determine correct format of names and years, if available:
 1. First check the local database or source information for listed names.
 2. Then look for names at *Library of Congress Name Authority* (<http://id.loc.gov>)
 3. If they are a known photographer, check *Getty Union List of Artists Names* for artwork (<http://www.getty.edu/research/tools/vocabulary/ulan/>).
- List secondary contributors in the **Contributors** field.
- If the creator is **unknown**, leave the field blank.

Examples: Jackson, Michael Smith, author
 Jackson, William Henry, 1843-1942, photographer
 Unidentified photographer with a studio in Forest Grove, Oregon

Description (D) REQUIRED

- Description of the content of the resource, not the resource itself.
- Enter descriptive text, remarks, and comments about the digital object. This information can be taken from the object or through other sources. Use full punctuation.
- Enter here specialized information not included in other elements, for example, description, technique, and distinguishing features if observable in the digital object.

Examples: Photograph originally published in the University Catalogue, 1925.

Diary kept by Louis Parsons of Burlington, Iowa. Parsons grew up in Burlington during the 1870s and 1880s. His father, Albion, owned a general store, while his mother, Mary, raised Louis and older sister Ella. Louis' father died when he was 13.

A woman and a child in a horse-drawn buggy; they are identified on the back as Mrs. Merrick and Charlotte. They drive on Garden of the Gods Road, by White House Ranch.

Transcription (E) OPTIONAL

- Use this field to add a transcription of text documents.
- For photographs, transcription of handwritten or typed notes on the item.
- For photographs, use only when there are notes added to the item. Use the description field to transcribe signs or other text in a photo.
- For photos, indicate if the writing is on the front or back.

Examples: The beautiful croquet set you sent me, arrived this morning in fine condition. Oh how good of you, to re-member so generously! Had you heard the exclamations of surprise and delight, when the pkg. [package] was opened, you would know how fully, your choice gift is appreciated.

[back] For Pacific University Archives

[front] To President Richie. Thanks for all the neckties.

Extent (F) OPTIONAL

- Use this field to describe the length in volumes, pages, leaves, minutes, or seconds of an item.

Examples: 2 volumes bound together
25 leaves
3 pages
3:16 (3 minutes 16 seconds)

Contributors (G) OPTIONAL

- The person(s) or organization(s) that made significant contribution to the resource but whose contribution is *secondary* to any person(s) or organization(s) already specified in a **Creator** field.
- Follow the same formatting guidelines as the **Creator** field.
- Examples of a contributor include editor, publisher, transcriber, illustrator, photography studio, etc.

Examples: Detroit Photographic Co., publisher
Heart of Oaks Yearbook, publisher
Bronson, Danni, editor

Digital Publisher (H) REQUIRED

- Person or Corporate/ Organizational entity responsible for producing a resource or a digital copy of a resource.

Examples: Pacific University Library
Washington County Museum

Subject.Topic (I) OPTIONAL

- Significant topics, events, or activities depicted or described in the item.
- Use as specific a heading as possible
- Do not mix broad and specific terms.
- Separate each entry with a semicolon.
- Subject terms are derived from this authority source:
 - *Library of Congress Subject Headings*: <http://id.loc.gov/authorities/subjects.html>

Examples: Students
Baseball teams
Badminton
Pioneers

Subject.Place (J) OPTIONAL

- The location depicted or described in the item.
- Use as specific a heading as possible. A full list of places in Washington County is included with the WCHO information. If you need a place name outside Washington County, check an authoritative source for spelling and use the same format.
- Separate each entry with a semicolon.
- Subject terms are derived from this authority source:
 - *McArthur, L. A., & McArthur, L. L. (2003). Oregon Geographic Names. Portland: Oregon Historical Society Press.*

Examples: Forest Grove, Oregon
Beaverton, Oregon
Washington County, Oregon
[example for outside Washington County] Tacoma, Washington

Subject.Person (K) OPTIONAL

- Any people depicted or described in the item.
- Separate each entry with a semicolon. Put a space between initials.
- Name headings are derived from this authority source:
 - *Library of Congress Name Authority File*: <http://id.loc.gov/>
- If a name cannot be found in the authority source use: Last name, First name, Middle Name or Initial
- Do not invert the name if it is unclear which name is the surname; use the name as it appears.
- There is a list of names entered into this field. If you would like to consult the list to see if the person depicted or described in your object has already been entered you may do so. This is optional.

- For text items; enter the author in the Creator field. Enter names in the Subject.Person field for works *about* that person.

Examples: Ritchie, M. A. F. (Miller Alfred Franklin), 1909-2000
 Toth, A. J.
 Moses, Grandma
 Madonna

Subject.Theme (L) OPTIONAL

- Themes that correspond to Oregon curriculum standards or other vocabularies relevant to educators.
- Separate each entry with a semicolon.
- Name headings are derived from this authority source:
 - *America History and Life subjects*: <http://www.ebscohost.com/titleLists/31h-subject.htm> look in the subject column [only available at Pacific University – but all terms are on the printed list]

Examples: United States History
 Local & State History
 African American History

Language (M) OPTIONAL

- A language of the intellectual content of the resource.
- Visual images do not usually have a language unless there is significant text in a caption or in the image itself.

Formatting:

- Use the ISO 639-2 scheme: Codes for the Representation of Names of Languages Part 2 <http://www.loc.gov/standards/iso639-2/englangn.html>
- In addition to using language codes, if needed, a textual description of the nature of the language may be included in the **Description** element.

Examples:

[chi]	Chinese
[eng]	English
[fre]	French
[ger]	Germany
[jpn]	Japanese
[spa]	Spanish

Rights & Usage (N) OPTIONAL

- Information about rights held in and over the resource.
- Copyright & intellectual property permissions concerning legal use, access and reproduction of a resource can be determined by the holding institution on a case by case basis.
- Can be different for each institution. Indicates where item is held, who to contact for fulfillment, and contact information. Rights statements should provide references or contact information. Additional clarification can be indicated via linking to an institutional policy statement or other web resource.
- **Use this boilerplate for photos:** Online access to this image is for research and educational purposes only. To inquire about permissions, order a reproduction, or for more information, please contact [institution name and point of contact information].
- **Use this boilerplate for text:** Online access to this item is for research and educational purposes only. To inquire about permissions, order a reproduction, or for more information, please contact [institution name and point of contact information].

Example: Online access to this image is for research and educational purposes only. To inquire about permissions, order a reproduction, or for more information, please contact the Pacific University Archives at archives@pacificu.edu.

Type (O) REQUIRED

- The characteristic that identifies a resource genre.
- Use DCMI Type Vocabulary for controlled list of authorized terms:
<http://dublincore.org/documents/dcmi-type-vocabulary/>.

Examples: Still Image
Text
Moving Image
Sound

Date-Created (P) OPTIONAL

- A concise description of the date or range of dates associated with the creation of the object. If using circa, do not capitalize. Use YYYY-MM-DD format for exact dates.
- **If you fill in this field, you must also fill in the Date.Range field.**
- Use guidelines provided for determining how to format a date or date range.

Examples: 1889
circa 1895
circa 1920s
1991-12-01
1880-1885

Date.Range (Q)

- The year or range of years expressed in the Date-Created field.
- **If you fill in this field, you must also fill in the Date-Created field.**
- Use only the format yyyy for a single year or yyyy-yyyy for a range of years.
- See table used to associate ranges of years with ranges of dates.

Date Created	Date.Range
circa 1990	1990
circa 1990s	1990-1999
circa early 1990s	1990-1994
circa mid 1990s	1993-1997
circa late 1990s	1995-1999
1990	1990
1990-1992	1990-1992
1990-09-13	1990
1990-09	1990
Twentieth Century	1900-1999
circa 1990s-2000s	1990-2009
circa late 1990s-2000s	1995-2009

Format.Original (R) OPTIONAL

- The physical manifestation of the resource.
- Use as many terms as applies to the resource.
- Subject terms are derived from this authority source:
 - *Getty Art and Architecture Thesaurus (AAT)*:
<http://www.getty.edu/research/tools/vocabularies/aat/index.html>

Examples: photographic prints
gelatin silver prints
card photographs
copy prints
cartes-de-visite
tintypes
drawings
engravings
personal papers
scrapbooks
diaries

Shelf Location (R) OPTIONAL

- A call #, classification #, or other identifier that would aid in the location of the physical item on the shelf or in the institution that holds it.

Examples: MS95
N 3361 .R5 1554
Larry Oglesby Collection, Morro Bay FT, bin #8

Source (S) OPTIONAL

- Text description including Collection Name, Accession Number, Physical Dimensions for graphic materials and Repository information. Or collection name and location.
- Enter information about the original item before digitization as follows: collection name, name of box, number of bin.

Examples: Photo Image Collection, Pacific University Archives
Larry Oglesby Collection

IsPartOf (T) OPTIONAL

- A citation or other reference to the work that the item is a part of.

Examples: First chapter of: Diary of a Sea Voyage to San Francisco and Commonplace Book of an Immigrant to Oregon, 1852
Sidney Harper Marsh Collection

Date.Digital (U) REQUIRED

- Date that the item was digitized.
- Prefer ISO 8601 W3C Date/Time Format YYYY-MM-DD

Examples: 2011-07-05
2009-10-14

Digitization Specifications (V) REQUIRED

- Scanner settings, software used, and specifics about file format. For dpi, insert the actual dpi of the Master TIFF.

Boilerplate:* Scanned at [###] dpi using an Epson V700 scanner. Images enhanced in Photoshop CS5. Saved as the highest resolution TIFF and also a derivative JPEG.

Scanned at [###] dpi using an Epson V700 scanner. Saved as a PDF.

*Be sure to adjust this if you are using your own equipment

Cataloged By (W) REQUIRED

- The initials of the individual(s) creating the metadata record. It will facilitate administrative functions including workflow and quality control.
- Enter initials in capitals without punctuation.

Examples: JAD (Jane A. Doe)
JS (John Smith)

Cataloged Date (X) REQUIRED

- Used to enter the date the digital item was cataloged.
- Enter the date the record is cataloged in YYYY-MM-DD format.

Examples: 2001-10-12
 2011-09-28

Controlled Vocabulary Lists

Please see the Wiki for the most up-to-date lists for:

Subject.Topic

Subject.Name

Subject.Theme

Format Original

<http://washingtoncountyheritageproject.pbworks.com>

Forms for Participants

WCHO Participant Agreement

Name of Institution: _____

Address: _____

Phone: _____ Fax: _____

Is hereby providing the collection described in the Washington County Heritage Online (WCHO) Project Worksheet for inclusion in WCHO. I understand and acknowledge this collection of digital objects (metadata and scanned images) will be hosted by OCLC (Online Computer Library Center) under the terms of the Pacific University installation of CONTENTdm. The collection will be stored in the WCHO digital repository and made accessible to both researchers and casual users searching WCHO. I also understand that the contribution of these digital objects enhances the overall value of the regional repositories (i.e. Northwest Digital Archives, WorldCat Local, Oregon Digital Library) and therefore will make every attempt to allow and foster continued access through WCHO of my organization's collection(s). My institution will be given access to the support materials at the online CONTENTdm Support Center, but will continue to receive live CONTENTdm support from Pacific University and the Washington County Museum (WCM).

My institution will contribute and maintain this collection in accordance with WCHO Best Practices Guide, including any enhancements, updating and/or revision of metadata to ensure its continued accuracy and quality. My institution also agrees to self-submit our materials. WCHO will provide my institution with a customized CONTENTdm Project Client for this purpose.

I have ascertained that my institution holds the necessary access rights to make this digital collection accessible to searchers of WCHO. My institution will also make a reasonable effort to ensure copyright compliance for items in our collection. WCHO, the Washington County Museum, and Pacific University will not be held responsible for any direct, indirect, consequential, or incidental damages arising out of or relating to the use of the information and materials linked to or found on the WCHO website. My institution will be fully responsible for the content of our collections in WCHO and indemnify and hold harmless the Library, Pacific University, WCM, and the employees and agents thereof, from any claims, losses, damages or legal actions incurred by the Library, Pacific University, WCM, or the employees or agents thereof, and arising from the content or dissemination of the content.

Please sign a copy of this agreement, and return to the WCHO Project Manager. She will then sign it and return a copy for your files. Return to: Lindsay Zaborowski, Pacific University Library #A124, 2043 College Way, Forest Grove, OR 97116.

Washington County Heritage Online

Lindsay Zaborowski, Project Manager

Date

Contributing Institution

Signature and Date

Printed Name and Position/Title at your Institution

WCHO Project Worksheet

Who will be working on your Project?

Schedule:

Projected Project Length: _____

Goals:

Activities:

WCHO Metadata Worksheet CONTENTdm Project Client Prep

Institution: _____

Filling out the following form will enable us to set up some of your Project Client fields to auto-fill. The Digital Publisher, Type, and Source fields will be auto-filled unless you direct otherwise. Filling in your identifier format will help us insure compliance with the File Naming Schema. The contact name and e-mail for the rights statements will help us to make personalized Rights and Usage boilerplates for your institution.

You will have the option at any point to have other metadata fields auto-filled.

1. Identifier format: _____
2. Digital Publisher: _____
3. Rights and Usage:
 - i. Online access to this image is for research and educational purposes only. To inquire about permissions, order a reproduction, or for more information, please contact the _____ [your institution] at _____ [e-mail].
4. Source: _____

OCLC Holding Symbol Form

CONTENTdm is run by OCLC (this stands for Online Computer Library Center). For your collection to be in CONTENTdm, and for the collection to be able to be part of library search engines like WorldCat, you will need an OCLC Holding Symbol. **If you already have one, just check the box at the bottom. You can write the symbol in the space provided if you know it.**

Library Name [40 characters max including space and punctuation]

Address _____

City _____

Zip Code _____

Contact Name _____

Contact E-mail _____

Associated Library* _____

Telephone _____

Fax _____

Library OPAC url _____

IP Range (All) _____

I already have an OCLC Holding Symbol _____