

Digital Scriptorium Metadata Creation Policy

Adopted: March 14, 2025

Scope and Purpose

Digital Scriptorium (DS) offers manuscript description and metadata creation support to member institutions that do not otherwise have staff or financial resources to produce their own manuscript descriptions. DS is currently able to offer the services of the Manuscript Data Curation Graduate Student Fellow to assist in metadata creation for the purposes of contributing to the DS Catalog for those institutions that would otherwise not be able to participate in DS.

The primary purpose of this metadata creation policy is to provide a framework of expectations for metadata creation. This service is provided as a DS membership benefit, meaning it is offered at no cost to member institutions that qualify for the service. The policy ensures that all manuscripts described by the Manuscript Data Curation Graduate Fellow (in consultation with the DS Advisory Council) are done so as accurately and consistently as possible and in accordance with common practices of manuscript description, regardless of whether the work is performed from digital images or in-person.

This policy applies to all manuscripts for which member institutions request metadata creation support. The Manuscript Data Curation Graduate Fellow, a trained specialist, is responsible for carrying out the metadata creation tasks in conjunction with the DS Advisory Council, either by examining digital images of the manuscripts provided by the institution or by visiting the institution in person to assess the manuscripts directly (provided that the member institution covers the costs of travel and accommodation).

By defining clear guidelines for both digital image-based and in-person review, this policy aims to ensure that high-quality metadata is created for all manuscripts, supporting improved discoverability, preservation, and scholarly research across the collection.

Objectives

The key objectives of this policy are to:

- Provide guidelines to the metadata creation for manuscripts, ensuring consistency across all records.
- Offer workflow flexibility through both remote (image-based) and on-site (in-person) processes to accommodate the varying needs of member institutions.
- Create high-quality structured metadata that enhances the discoverability of manuscripts in the DS Catalog.

Limitations and Considerations

Manuscript cataloging is an inexact art. Description is based on existing scholarship, original research, and the expertise and experience of the cataloger (and/or cataloging team). Manuscript description is not, indeed cannot, be guaranteed to be accurate, but is performed with the Manuscript Data Curation Graduate Fellow's and Advisory Council's commitment to providing

the most accurate and descriptive metadata possible based on their expertise and the resources available.

Responsibilities

Manuscript Data Curation Graduate Fellow

The Manuscript Data Curation Graduate Fellow is responsible for conducting the basic descriptive cataloging of manuscripts and creating new metadata to describe aspects of the manuscripts that have not yet been documented, where possible and requested by the qualifying member institution. This includes examination of manuscripts from photographs; conducting original research; and reviewing existing scholarship. The Fellow will provide minimal basic description where possible in line with the expectations of the DS Catalog (which is not a descriptive catalog and thus may have less intensive description than a catalog whose purpose is holistic, in-depth description).

While the Fellow is responsible for the creation of new metadata, they may encounter questions or require clarification, particularly regarding specialized aspects of specific manuscript traditions. In such instances, the Fellow is encouraged to seek guidance from the DS Advisory Council—a team of experts specializing in a range of manuscript traditions. The Advisory Council serves as a resource, providing expert advice and helping to validate the Fellow’s work when needed, ensuring the quality and accuracy of the cataloging.

The time commitment of the Fellow is currently limited to 20 hours a week and metadata creation services will reflect a reasonable portion of the Fellow’s time, taking into account their other responsibilities. Because of the Fellow’s limited time, the Fellow will contribute essential metadata rather than comprehensive descriptive cataloging. By contributing even a simple baseline description, we anticipate that the DS user community will be able to refine and build upon the initial description provided by the Fellow.

Member Institutions

Member institutions play a critical role in supporting the metadata creation process by ensuring the Fellow has the necessary resources to carry out their work. Each institution (and/or institutional member representative) is responsible for:

- **Providing Basic Identifying Metadata:** In advance of original description, institutions should provide the Fellow with shelfmarks or identifiers for manuscript objects that the institution wishes for the Fellow to describe.
- **Providing Access to Manuscript Images:** Institutions should supply the Fellow with digital images of the manuscripts they wish to have cataloged. Archival-level digitized images are *not required*: smartphone photos are acceptable for description purposes. These images should be shared through either Google Drive or Dropbox, with the institution ensuring that the images are of sufficient quality for accurate description.
- **Labeling Images with a Clear Naming Convention:** To avoid confusion and ensure the correct matching of images to manuscript shelfmarks or other identifiers, institutions must label their images according to a consistent and identifiable file naming convention.

This step is crucial for ensuring the smooth progression of the metadata creation process and minimizing errors in matching images to the correct manuscripts.

- **Transferring Existing Descriptive Metadata:** If an institution has existing unstructured descriptive metadata—such as information from dealer or bookseller descriptions—this metadata must be transferred into the DS-CSV (or encoded/rendered as some form of structured data) by the institution before metadata creation begins. The Fellow’s role is focused on the creation of new metadata, describing aspects of the manuscripts that remain undocumented. Any pre-existing descriptions that originated outside the institution must be transferred by the institution itself; this task does not fall under the Fellow’s remit.

Metadata Review

Once metadata creation has been completed, the metadata will undergo an informal review process before it is reconciled and uploaded to the DS Catalog. Both the member institution and the organization play key roles in this review:

- **Member Institution Representative Review:** A representative from the member institution is responsible for reviewing the newly created metadata to ensure that it meets their expectations and accurately describes their manuscripts. This review must be completed before the reconciliation process can begin.
- **DS Catalog Project and Data Manager Review:** Following the institution’s review, the DS Catalog Project and Data Manager will conduct a final review of the metadata. This review ensures that the metadata adheres to organizational standards and is ready for upload into the DS Catalog. Both reviews help ensure the accuracy, consistency, and completeness of the manuscript descriptions across the catalog. During review, the DS Catalog Project and Data Manager may make formatting or other non-substantive changes to metadata records at their discretion to prepare data for DS enrichment and ingest processes.

Metadata Creation Standards

To ensure consistency across all manuscript descriptions, the Manuscript Data Curation Graduate Fellow will adhere to specific guidelines and use a structured approach for metadata creation. The following standards and procedures will govern the metadata creation process:

DS-CSV Metadata Input

All metadata created during the metadata creation process will be entered into the [DS Catalog Member Data Spreadsheet \(DS-CSV\)](#), a Google-based spreadsheet that serves as the primary tool for organizing and managing manuscript data. This spreadsheet format allows for efficient data entry, organization, and collaborative editing. Each member institution will have editing access to the DS-CSV, enabling them to review and make changes to the metadata where appropriate.

The DS-CSV will be used to capture both newly created metadata generated by the Fellow and any pre-existing metadata supplied by the institution. This ensures that all descriptive information is consolidated into one unified format, simplifying the reconciliation process. The

DS-CSV will be provided to the institution upon completion of the work and will be thereafter managed and maintained by the institution.

Descriptive Cataloging Guidelines

As there is no universally established standard for cataloging manuscript objects, the Manuscript Data Curation Graduate Fellow will follow the guidelines set forth in the [DS Catalog Member Data Metadata Application Profile \(DS MAP\)](#) supplemented by the use of [Descriptive Cataloging of Ancient, Medieval, Renaissance, and Early Modern Manuscripts](#) (AMREMM) by Gregory A. Pass (2003). AMREMM will serve as a content standard framework for creating descriptive records, guiding the Fellow in documenting key aspects of each manuscript, where possible, such as:

- Production place(s) and date(s)
- Titles, genres, and subjects
- People involved in the manuscript's history and their roles
- Physical description
- Provenance information

By utilizing AMREMM as the base guideline, the Fellow ensures a structured and thorough approach to manuscript cataloging, capturing both the textual and physical characteristics that are critical for scholarly research and institutional needs.

Authority Alignment and Reconciliation

Once the initial metadata has been input into the DS-CSV, it will undergo a reconciliation process to ensure consistency with authority files. Authority alignment is an essential step to standardize values such as personal names, geographic locations, and subject headings across the dataset. This process will ensure that metadata conforms to established vocabularies, enhancing the discoverability and interoperability of manuscript descriptions across digital platforms and catalogs. The DS Catalog Authority Management and Data Enrichment Plan may be referenced [here](#).

Workflow and Access

Original metadata creation for qualifying institutions work on the part of the Fellow will commence upon receipt of the member institution's dues. In advance of the metadata creation work, the member institution will transfer unstructured legacy data (including, but not limited to, provenance records, existing dealer or bookseller descriptions, and previous records determined to be outdated) into the DS-CSV. Throughout the process of original metadata creation, the member institution will provide the following metadata elements (which, due to their identifying nature or description of the physical object, cannot be provided by the Fellow if the Fellow is working from digital objects):

- Holding institution identifier
- Shelfmark
- Link to institutional record/IIIF manifest (if applicable)
- Materials description

- Extent
- Dimensions
- Binding (where applicable)
- Provenance notes (from legacy data and institutional records)

Other metadata elements that have been previously defined (such as in dealer or bookseller catalogs, previous sales, or previous instances of metadata creation) should also be included in the DS-CSV.

The Fellow will, in turn, provide the following elements of description as far as possible:

- Production Place(s)
- Production Date(s)
- Title(s)
- Genre/Form
- Subject(s)
- Author, Artist, Scribe, Former Owner name(s)
- Language(s)
- Layout
- Script
- Decoration
- Other elements of physical description
- Provenance notes (gleaned from the manuscript and/or independent research)
- Other notes

If, upon the completion of metadata creation, the member institution plans to transfer the cataloging data performed by the Fellow into their own institutional records, they may reference the [DS Metadata Application Profile](#) for assistance.

Quality Control

To ensure the highest standards of accuracy and consistency in manuscript cataloging, the Manuscript Data Curation Graduate Fellow will work closely with the Advisory Council and the DS Catalog Project and Data Manager throughout the metadata creation process. This ongoing consultation ensures that the Fellow has access to expert advice and validation as needed.

Once the metadata creation process is complete, the member institution will have the opportunity to review the metadata. While the institution may ask questions or request clarification, any changes to the metadata should be made in collaboration with the Fellow to maintain alignment with established cataloging guidelines and standards. This collaborative review process helps ensure that the final manuscript descriptions are accurate, consistent, and reflective of both institutional and scholarly needs.

Access to DS-Generated Original Metadata

The enriched and reconciled metadata created through the metadata creation process will be made publicly accessible through the DS Catalog, the online data repository, semantic portal, and knowledge base of the Digital Scriptorium consortium, which enables users to search and explore manuscript objects across North American collections through a single platform. The DS

Catalog serves as the primary access point for public engagement with the metadata, supporting both scholarly research and institutional outreach.

As per the Memorandum of Understanding signed by member institutions upon their entry to DS, Digital Scriptorium will maintain ownership of the enriched data. Data will be made available to the public from the DS Catalog Wikibase instance under a Creative Commons Attribution 4.0 International (CC BY 4.0) license. This ensures that both member institutions and the wider research community can benefit from the newly created and reconciled metadata, promoting greater discoverability and use of the manuscripts held by member institutions.

Revisions and Updates

This metadata creation policy will be reviewed and updated on a biannual basis by the DS Advisory Council and Board of Directors. These reviews will ensure that the policy remains aligned with evolving cataloging standards, member institution needs, and the goals of the organization. Any necessary updates will be implemented following the review to maintain the accuracy, relevance, and effectiveness of the policy.