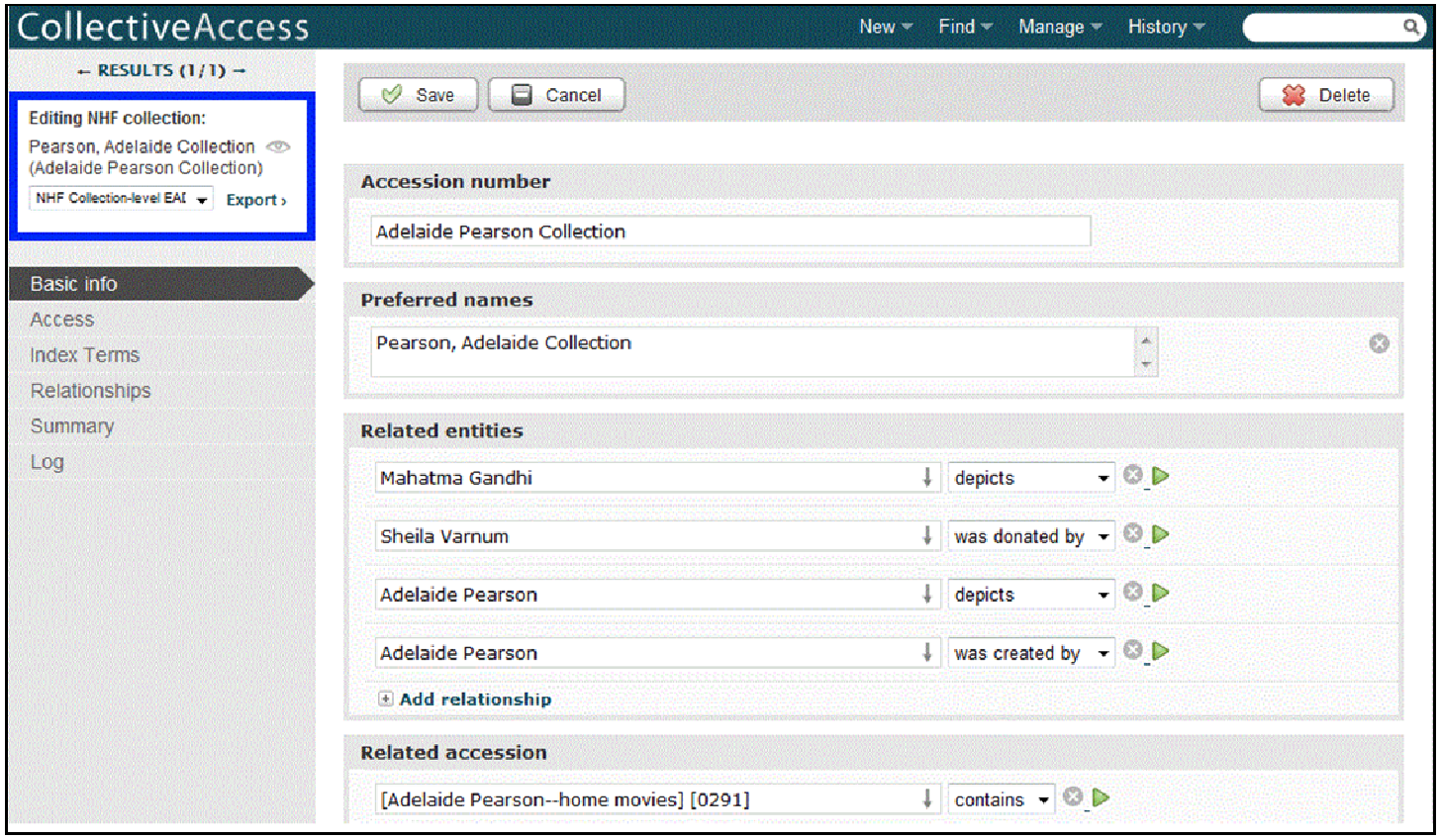
Northeast Historic Film
CollectiveAccess Cataloging Manual

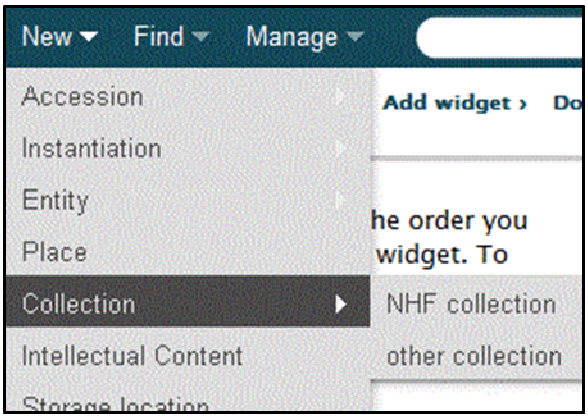
Revised 5/14/12



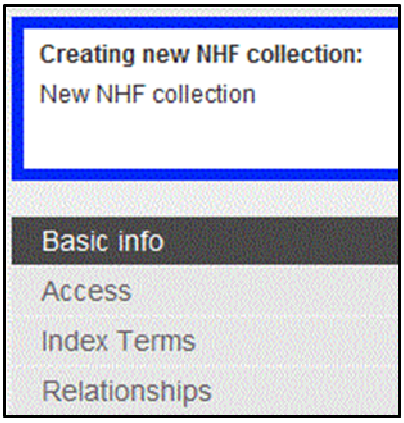
I. COLLECTION RECORDS

NHF's CollectiveAccess Collection Record template is based on the DACS (*Describing Archives: A Content Standard*) and EAD (Encoded Archival Description) data standards.

To create a new collection record, select New>Collection>NHF collection.



The fields of the collection record are arranged into four page areas: Basic Info, Access, Index Terms, and Relationships. You can select each area from the toolbar on the left, but must save any additions or changes to the current page before navigating away from it.



Collections: BASIC INFO

Collection identifier

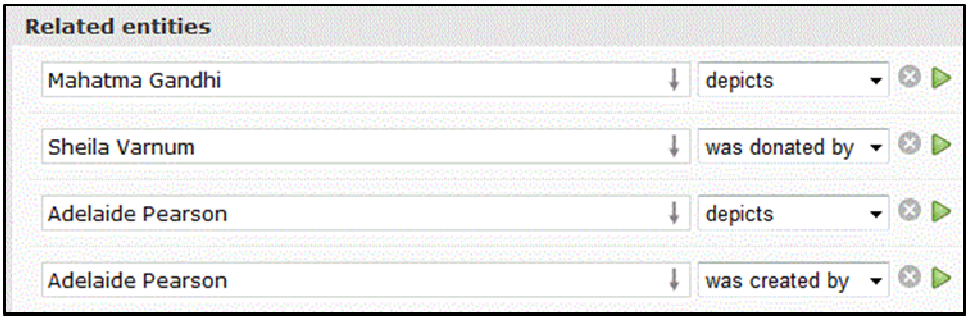
Definition: A unique identifier for the collection being described.
DACS Reference: Reference Code (2.1); Title (2.3)
This value serves as both reference code and title for NHF collections. Enter the collection title here in natural language order, as established previously with the donor or depositor. Established NHF collection titles will not be revised to meet DACS rules.
Examples:
Hiram Historical Society Collection
Edgar Pearson Collection
Central Maine Power Collection

Preferred names

Definition: Entry element form of NHF collection title.
DACS Reference: Form of Names for Persons and Families—Entry Element (12.4)
The collection title is reformatted here to allow for alphabetical sort by personal surname. If this is a corporate or family collection, reenter the title here as it appears in the previous field. If this is an individual collection, reformat the name within the collection title according to DACS rules for entry elements and enter it here.
Examples:
Hiram Historical Society Collection
Pearson, Edgar Collection
Camp, Frederic E., Mrs. Collection
Shettleworth, Earle, Jr. Collection

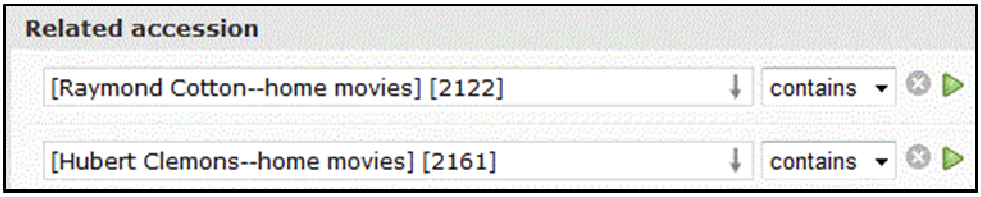
Related entities

Definition: Persons, families, and organizations related to the collection as creators, donors, or subjects.
DACS Reference: Name of Creator(s) (2.6); Immediate Source of Acquisition (5.2)
As you begin typing, CollectiveAccess will generate a list of existing entity names matching your stem. Select the correct entity name from the generated list. (If there is not an existing entity record, you must create one; see *Entity Records*.) Select the relationship type from the options in the dropdown menu to the right of the name field: "was created by," "was donated by," and "depicts." If an entity is related to the collection in more than one way (e.g., as both creator and donor), create additional name entries for each relationship type. If the creator of the collection materials is not known, select the existing entity record for "[creator(s) unknown]."
Example:



Related accession

Definition: NHF accession lots contained within the collection.
DACS Reference: n/a
As you begin typing the accession number or title, CollectiveAccess will generate a list of existing accession lot records matching your stem. Select the correct accession lot from the generated list. The relationship type will default to "contains." If there is not an existing accession lot record, you must create one; see *CollectiveAccess Accession 'How to.'* If a collection contains multiple accession lots, add new accession fields for each.
Example:



Collection date span

Definition: The dates of creation of the materials comprising the collecting.
DACS Reference: Date (2.4)
Enter the date(s) of creation as a single year, or as an inclusive range of years from the earliest to the latest dates of the materials. A single year may also be preceded by "circa" to denote an estimate. Note: At this time, other DACS date expressions are not recognized as valid by CollectiveAccess; these include bulk dates, estimated date ranges, and dates unknown.
Examples:
1932-1938
circa 1940

Collection Summary

Definition: Basic information about the nature of the materials and activities reflected in the collection, described to enable users to judge its potential relevance.
DACS Reference: Scope and Content (3.1)
Current practice is to set out in the first sentence a statement listing the physical contents of the collection (including reels of film, published books, film equipment – whatever is accessioned into the collection); in the next 3-4 sentences, statements highlighting the creator and creation dates, main topics, events, locations, and people within the collection; and in the last sentence, a statement highlighting the most important or significant items in the collection. See *Style Sheet* for more information.
Example:
"The Harris M. Elliott Collection consists of 27 reels of amateur 8 mm. film and one commercial 8 mm. film print. The amateur films in the collection were shot by Harris Elliott and document his family and children over the years from 1938 to 1959 at home and on vacation at locations including Little Sebago Lake, Maine, and Lake Champlain. Of particular interest are reels documenting noteworthy events and activities in the region, including a survey of 1938 hurricane damage in Western Massachusetts; the first annual Aerial Roundup in 1941 at the Scarboro Airport in Portland, Maine; the laying of an underground toll phone cable from Portland, Maine, to Boston, Massachusetts, in 1941; and the shipwreck of the freighter Oakey L. Alexander off the coast of Maine in 1947."

Biographical and Historical notes

Definition: Basic information about the primary individuals, families, or organizations associated with the collection, described in order to place the material in context and make it better understood.
DACS Reference: Administrative/Biographical History (2.7, 10.0)
Provide brief biographical or historical sketches as necessary to convey the overall context of the collection. As per Greene and Meissner, "the goal should always be to convey such narrative content and contextual information as briefly as possible and with as little recourse to outside sources as possible." See *Style Sheet* for more information.
Example:
"Oscar Rempel Houston was born in 1884 in Logan, Ohio. Houston married Nelly Snead McDonald in 1912. They had three children: Charles, Barbara, and Janet. Houston resided in Great Neck, New York, for much of his life. He was living in Manhattan when he died in 1969 at age 86. Houston graduated from Columbia College in 1904 and from Columbia Law School in 1906. As counsel and senior partner at the New York firm of Bigham Englar Jones & Houston, he specialized in admiralty law, at one time serving as president of the Maritime Law Association of the United States. Houston was an avid traveler, fisherman, and mountaineer. His son, Charles Snead Houston, was a pioneering alpinist, introduced to the sport by his father, and supported and accompanied by him on several expeditions, including the Mount Foraker and Nanda Devi expeditions documented in this collection."

System of Arrangement

Definition: A statement of the current arrangement of materials in the collection.
DACS Reference: System of Arrangement (3.2)
In nearly all cases at NHF, a minimal statement of the system of ordering will be sufficient, e.g. ,"Chronological." If other aspects of the arrangement are important to the understanding of the materials, note this here.
Example:
Chronological

Primary format

Definition: A statement of the extent and physical nature of the materials being described.
DACS Reference: Extent (2.5)
Following DACS general rules, record the quantity of the material in terms of its physical extent as number of items, number of containers or carriers, etc. Multiple or approximate statements of extent may be provided as necessary. Specific material designations should be based on AMIM2 for film and video materials, and on AACR2 for other materials. Additional detail regarding film and video formats and gauges may be described briefly in the Collection Summary field, and more extensively in the Instantiation records.
Examples:
30 film reels
9 videocassettes
5 film reels, 75 photographs, 1 folder of textual materials
approximately 2,000 film rolls

Record access

Definition: The public access status of the Collection record.
During the editing and review process, set the status to "not accessible to public." Once the record is ready to publish, and there are otherwise no reasons to withhold public access to the record, select "accessible to public."

Record status

Definition: The status of the Collection record in the editing and review process.
Maintain the status as "editing in progress" throughout record creation and editing; update to "editing completed" if submitting the record for review. The record status for all published records should be "completed."

Collections: ACCESS

Copyright Holder(s)

Definition: Identification of the copyright holder for the collection materials.
DACS Reference: Conditions Governing Reproduction and Use (4.4.9)
If a full deed of gift is in place, enter "Northeast Historic Film" as the copyright holder. If a deposit agreement is in place, enter the depositor name as the copyright holder. This field is not publicly displayed and is for internal use only.

Condition

Definition: Brief statement of the condition of collection materials overall.
In cases where condition may affect access, provide a brief condition summary, if it can be readily assessed from available records. This field is not publicly displayed and is for internal use only.
Examples:
Extensive physical damage.
Advanced acetate deterioration.

Conditions Governing Reproduction and Use

Definition: A statement of conditions governing the reproduction, publication, and use of collection materials.
DACS Reference: Conditions Governing Reproduction and Use (4.4.6)
Value defined for field: “Authorization to reuse and/or reproduce must be obtained from Northeast Historic Film. See http://oldfilm.org/content/stock-footage-licensing for more information.”

Collection access

Definition: A brief statement of the extent of access to the collection.
DACS Reference: Conditions Governing Access (4.1)
Only two values are defined for this field: "Collection is open for research" and "Access is restricted; consult repository for detail." If any part of a collection has access restrictions in place, use the latter statement.

Collection Access Notes

Definition: "Text describing rights and restrictions on collection. This is a required field with a minimum description of pending status."
DACS Reference: n/a
For each accession lot in the collection, note the date of the deed of gift or deposit agreement and summarize the rights statement, noting any restrictions. If no agreement is recorded, note if one was sent by NHF. This field is not publicly displayed and is for internal use only.

Collection Physical Access

Definition: A statement of the availability of access copies for materials in the collection.
DACS Reference: Physical Access (4.2)
Three values are available within a dropdown menu for this field, indicating if access copies are available for all, some, or none of the items in the collection.

Collection Access Repository

Definition: The repository that holds the collection described.
DACS Reference: Name and Location of Repository (2.2)
Value defined as "Northeast Historic Film."

RepositoryAddress

Definition: The location of the Collection Access Repository.
DACS Reference: Name and Location of Repository (2.2)
Value defined as "85 Main St, Bucksport, ME 04416 USA."

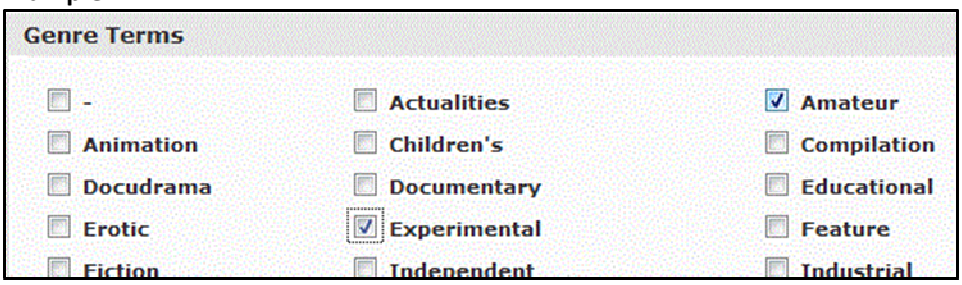
Language Materials

Definition: A statement of the languages used in the collection materials, particularly as they may affect its use.
DACS Reference: Languages and Scripts of the Material (4.5)
Enter a brief statement of the languages used in the materials being described, or a statement indicating an absence of language materials in exclusively visual collections.
Examples:
"No textual or other language materials are included in the collection"
"Intertitles and can notes are in English."

Collections: INDEX TERMS

Genre Terms

Definition: Identifies moving image genres represented within this collection.
Select from the list of genre terms displayed in this check-box field.
Example:

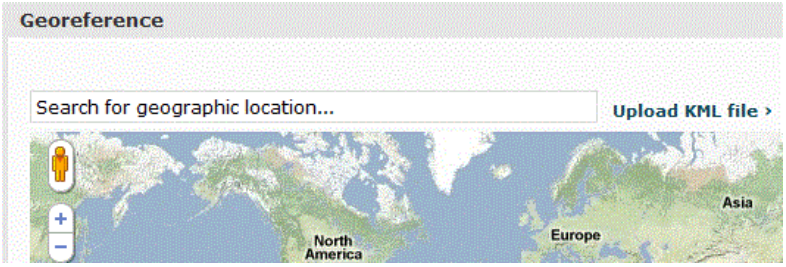


Related Vocabulary Terms

Definition: Identifies general subjects represented within this collection.

Georeference

Definition: Identifies geographic locations represented within this collection.



Examples:
France
Paris, France
Texas, US
Paris, TX

Collections: RELATIONSHIPS

Related Instantiations

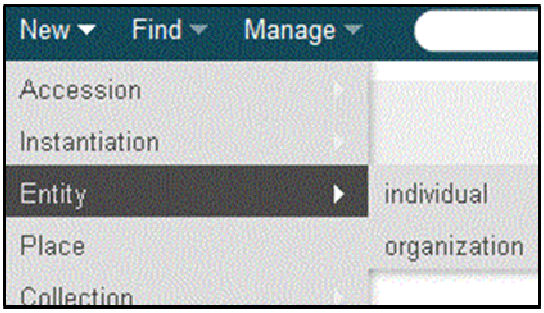
Definition: Identifies the records of instantiations contained within this collection.
Recommended practice is to define this relationship from the Related Collections field in the Instantiation record when that record is created. See *Instantiation Records* for more information.

Related Intellectual Content / Work

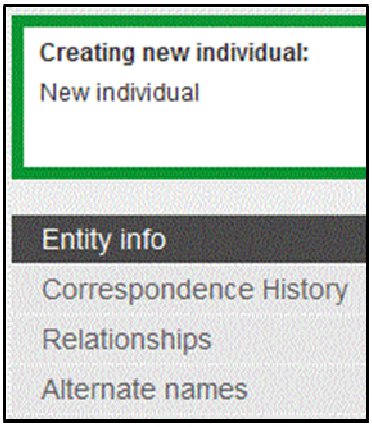
Definition: Identifies the records of intellectual content represented within this collection.
Recommended practice is to define this relationship from the Related Collections field in the Intellectual Content record when that record is created. See *Intellectual Content Records* for more information.

II. ENTITY RECORDS

To create a new entity record, select New>Entity>individual OR >organization. At NHF, the Individual record type is used to record the names of persons and families. The Organization record type is used to record the names of corporate bodies.



The fields of the entity record are arranged into four page areas: Entity Info, Correspondence, Relationships, and Alternate names. You can select each area from the toolbar on the left, but must save any additions or changes to the current page before navigating away from it.

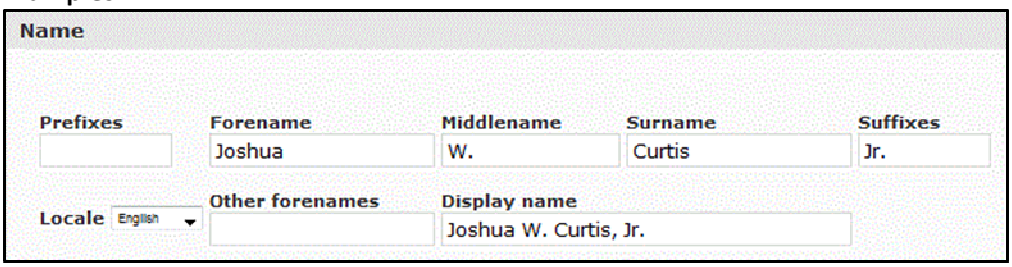


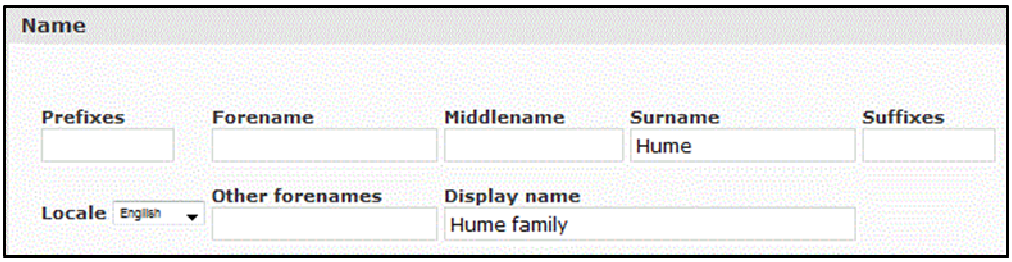
Entity: ENTITY INFO

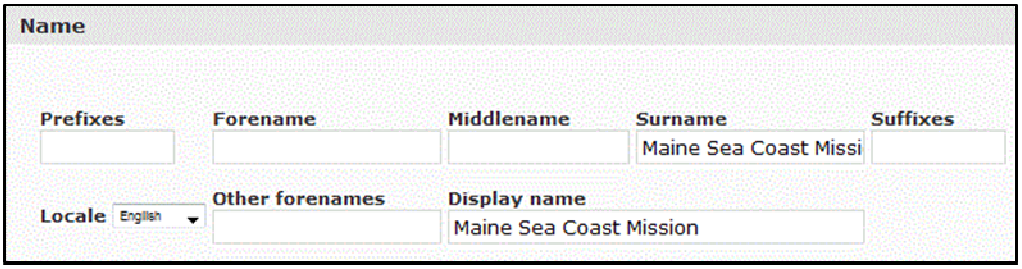
Name

If there is an authority form of the name available from Library of Congress Authorities, use it here. It will be necessary to break the name down into components for entry into this data form. If there is no authority heading available, follow DACS rules for persons and families (12) and for corporate bodies (14).

Examples:







Lifetime

Definition: Lifetime of entity (date range)

DACS Reference: Personal names--Dates (12.17)

Add a person's dates or birth or death, if known, according to DACS rules at 12.17. If using an LCNAF heading, record the date component here. Note: In this field, CollectiveAccess will reformat or not recognize some valid DACS and LCNAF date expressions

Examples:

1914-1993

1965-

Related collections

Definition: Identifies the records of collections with which this entity is associated as creator, donor, or subject. Recommended practice is to define this relationship from the Related Entities field in the Collection record. See *Collection Records* for more information.

Access
Definition: Indicates if entity information is accessible to the public.
During the creation and editing of a new record, set the status to "not accessible to public." An entity record should only be made accessible to the public if one or more of the Collection or Intellectual Content records to which it is related are publicly accessible.

Status
Definition: Indicates the status of the Entity record in the editing and review process.
Maintain the status as "editing in progress" throughout record creation and editing; update to "editing completed" if submitting the record for review. The record status for all published records should be "completed."

Entity: RELATIONSHIPS

Related entities
Definition: Other people, families, or organizations related to this entity.
This field may be used to define relationships between recorded entities. Not in common use at NHF.

Related works [Related intellectual content]
Definition: Intellectual Content records associated with this entity according to an extensive menu of PBCore Creator and Contributor types.
Recommended practice is to define this relationship from the Related Entities field in the Intellectual Content record.
See *Intellectual Content Records* for more information.

Entity: ALTERNATE NAMES

Alternate names
This field is identical in structure to the Name field on the Entity Info page. If recording an alternate form of the name provided in the primary Name field, enter it here. As in the primary Name field, break the name down into its components for entry into this data form. Follow DACS rules for persons and families (12) and for corporate bodies (14).

III. INTELLECTUAL CONTENT RECORDS

NHF's CollectiveAccess Intellectual Content Record template is based on the PBCore data standard.

To create a new intellectual content record, select New>Intellectual Content.

The fields of the record are arranged into four page areas: Basic Info, Index Terms, Instantiations, and Relationships. You can select each area from the toolbar on the left, but must save any additions or changes to the current page before navigating away from it. Note that both of the fields appearing on the Relationships page appear also on the Basic Info page and will display information as recorded there.

Intellectual Content: BASIC INFO

Related collections

Definition: Identifies the records of collections in which this intellectual content is represented.
PBCore 2.0 reference: pbcoreRelation
As you begin typing the collection title, CollectiveAccess will generate a list of existing collection records matching your stem. Select the correct collection title from the generated list. The relationship type will default to "part of." If there is not an existing collection record, you must create one; see *Collection Records*.

Related accession

Definition: Identifies the records of accession lots in which this intellectual content is represented.
As you begin typing the accession number or title, CollectiveAccess will generate a list of existing accession records matching your stem. Select the correct accession lot from the generated list. The relationship type will default to "is part of." If there is not an existing accession record, you must create one; see *Accession Records*.

Identifier

Definition: A unique alphanumeric identifier for this entry.
PBCore 2.0 reference: pbcoreIdentifier
Use the eight-digit accession number for the corresponding reel. If the accession for the work was recorded as a multiple-reel item, enter the range or sequence of accession numbers as the identifier.
Example:
2114.0007
2114.0010-.0012

Title & Type

Definition: The unique name given to the media item.
PBCore 2.0 reference: pbcoreTitle
Select the title type from the drop-down menu. For supplied titles, see the *Style Sheet* for more information. For published or series titles, follow AMIM2 rules.
Examples:
New York World's Fair, 1939—Cyrus Pinkham—home movies. Reel 13
Harvesting ice

Alternate Title & Type

Definition: Alternate or additional names given to or associated with the media item.
PBCore 2.0 reference: pbcoreTitle
Select the title type from the drop-down menu. For supplied titles, see the *Style Sheet* for more information. For published or series titles, follow AMIM2 rules.

Related entities

Definition: Persons, families, and organizations related to the collection as creators or contributors.
PBCore 2.0 reference: pbcoreCreator; pbcoreContributor
Usage: This field links the Intellectual Content record to related Entity records according to an extensive menu of PBCore Creator/Contributor role types. Use the generic "Creator" or "Contributor" in the absence of a more appropriate role type.

pbcorePublisher

Definition: A person or organization primarily responsible for distributing or making the media item available to others. The publisher may be a person, a business, organization, group, project or service.
PBCore 2.0 reference: pbcorePublisher

Date Span

Definition: A span of time expressed by the intellectual content of the media item.
PBCore 2.0 reference: pbcoreCoverage
Usage is consistent with DACS 2.4 rules followed for date expressions at the collection level. Enter the date(s) of creation as a single year, or as an inclusive range of years from the earliest to the latest dates of the materials. A single year may also be preceded by "circa" to denote an estimate.
Examples:
1932-1938
circa 1940

Rights Summary NHF

Definition: Information about copyrights and property rights held in and over the media item. Includes subelements.
PBCore 2.0 reference: pbcoreRightsSummary

NHF Rights Summary Public Statement

A public summary statement of rights. Select a value from a dropdown menu of three: "This item is available for reuse," "This item may be available for reuse," or "Reuse of this item is currently restricted."

NHFRightsSummary

A private summary statement of rights expressed in NHF's in-house rights codes.
Select a value from the dropdown list of NHF rights codes. There is an additional text subfield available for elaborating on NHF rights conditions in a private note field.

Description

Definition: A descriptive account of the intellectual content of the media item.
PBCore 1.3 reference: pbcoreDescription
This is a repeatable field with a range of Description Types which may be associated with each description through a dropdown menu. A brief abstract statement should be provided. This may be supplemented in additional Description fields by more extensive types of description as are appropriate and readily available, such as can description, donor-supplied notes, viewing notes, shot lists, etc. See *Style Sheet* for additional details.

pbcoreExtensions

Definition: Additional descriptions or important aspects of the media item that are not appropriately recorded elsewhere in the Intellectual Content record.
PBCore 2.0 reference: pbcoreExtension

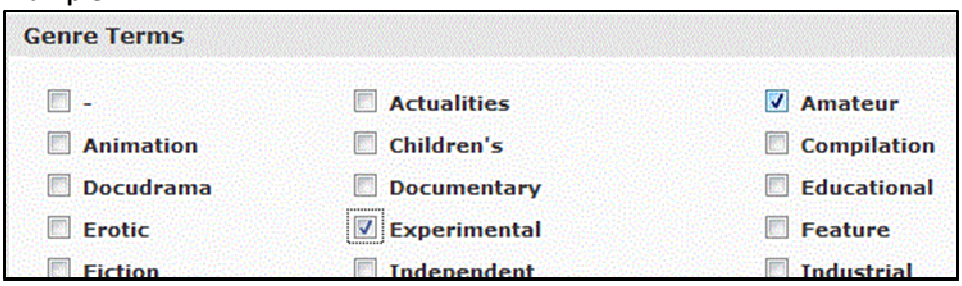
Access

Definition: Indicates if the intellectual content record is available to the public.
During the editing and review process, set the status to "not accessible to public." Once the record is ready to publish, and there are otherwise no access restrictions, select "accessible to public."

Intellectual Content: INDEX TERMS

Genre Terms

Definition: Identifies moving image genres represented by this media item.
Select from the list of genre terms displayed in this check-box field.
Example:

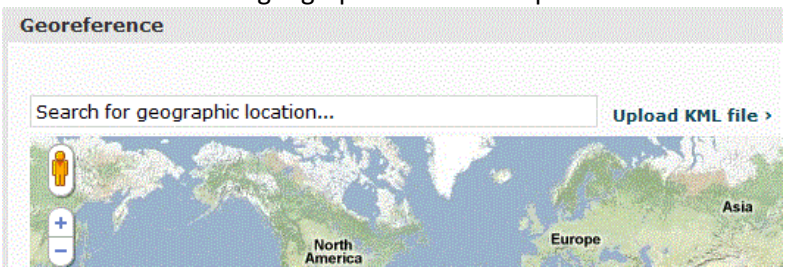


Related Vocabulary Terms

Definition: Identifies general subjects represented by this media item.

Georeference

Definition: Identifies geographic locations represented within this media item.



Examples:
France
Paris, France
Texas, US
Paris, TX

Intellectual Content: INSTANTIATIONS

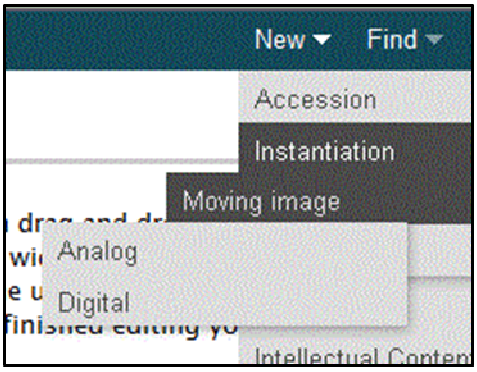
Related Instantiations

Definition: Identifies the records of analog and digital instances of this intellectual content. Recommended practice is to define this relationship from the Related Intellectual Content field in the Instantiation record when that record is created. See *Instantiation Records* for more information.

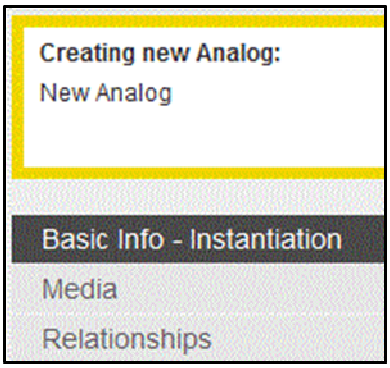
IV. INSTANTIATION RECORDS

NHF's CollectiveAccess Instantiation Record template is based on the PBCore data standard.

To create a new instantiation record for a moving image, select New>Instantiation>Moving image>Analog OR >Digital.



The fields of the record are arranged into three page areas: Basic Info, Instantiations, and Relationships. You can select each area from the toolbar on the left, but must save any additions or changes to the current page before navigating away from it. Note that both of the fields appearing on the Relationships page appear also on the Basic Info page and will display information as recorded there.



Instantiation: BASIC INFO

Object identifier

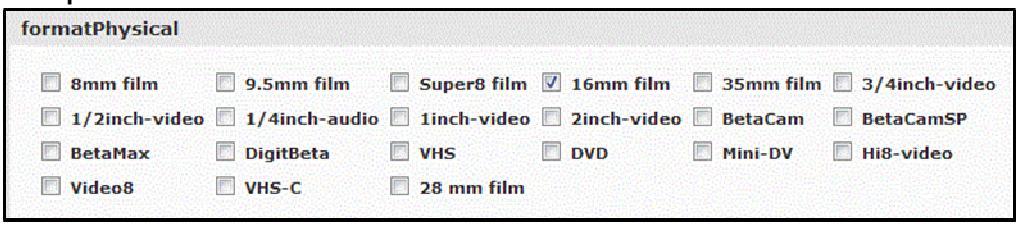
Definition: A unique alphanumeric identifier for this particular instantiation of the media item.
PBCore 2.0 reference: instantiationIdentifier
Simple analog instantiations are assigned a compound identifier beginning with the accession and item numbers, followed by a format code. See "Protocol for Creating Item Level PBCore Identifiers at NHF" for more information.
Examples:
1050.0001_F16
2175.0010_BSP
2463.0001-.0010_DVD

Related intellectual content

Definition: Identifies the records of intellectual content depicted in this instantiation.
As you begin typing the title or identifier of the intellectual content, CollectiveAccess will generate a list of existing intellectual content records matching your stem. Select the correct record from the generated list. Select the appropriate relationship type from the dropdown menu next to the intellectual content title: "depicts" (default value) or "was used in." If there is not an existing intellectual content record, you must create one; see *Intellectual Content Records*. If an instantiation depicts more than one content item, add a new field for each.

formatPhysical

Definition: The format of the particular instantiation as it exists in a physical form.
PBCore 2.0 reference: instantiationPhysical
Select from the list of formats displayed in this check-box field.
Example:



Format: Location

Definition: The specific location for the instantiation.
PBCore 2.0 reference: instantiationLocation
"The descriptor instantiationLocation is considered to be an address for a media item. For an organization or producer acting as caretaker of a media resource, instantiationLocation may contain information about a specific shelf location for an asset, including an organization's name, departmental name, shelf ID and contact information. " (pbcore.org)

Date Issued

Definition: The formal date a particular version or rendition of a media item has been made ready or officially released for distribution, publication or consumption.
PBCore 2.0 reference: instantiationDate where dateType="issued"
Usage is consistent with DACS 2.4 rules followed for date expressions at the collection level. Enter the date issued as a single year, which may be preceded by "circa" to denote an estimate.
Examples:
2007
circa 1985

Date Created

Definition: The creation date for a particular version or rendition of a media item across its life cycle.
PBCore 2.0 reference: instantiationDate where dateType=”created”
Usage is consistent with DACS 2.4 rules followed for date expressions at the collection level. Enter the creation date of the instantiation as a single year, which may be preceded by "circa" to denote an estimate.
Examples:
2007
circa 1985

Media Type

Definition: The general, high level nature of the content of a media item. It uses categories that show how content is presented to an observer, e.g., as a sound or text or moving image.
PBCore 2.0 reference: instantiationMediaType
Select from the list of media types displayed in this check-box field.
Example:

formatGenerations

Definition: “The particular use or manner in which a version or rendition of a media item is used.
Indicates the relationship of a film or video copy to the original and other elements/instantiations in the duplication process. Select the value from the dropdown menu.
PBCore 2.0 reference: instantiationGenerations

Format: Standard

Definition: The larger technical system/standard or overarching media architecture under which the media format of this instantiation exists.
PBCore 2.0 reference: instantiationStandard
Select the appropriate audio, video, or film standard from the dropdown menu. The standard for all motion picture film instantiations is "Film." For most NHF video formats, the standard is “NTSC (interlaced).”

Sound/Silent

Definition: This is an annotation field for documenting basic information about whether a moving image instantiation has sound or is silent.
PBCore 2.0 reference: instantiationAnnotation

Instantiation: RELATIONSHIPS

Related collections

Definition: Identifies the records of collections of which this instantiation is part.
As you begin typing the collection title, CollectiveAccess will generate a list of existing collection records matching your stem. Select the correct collection title from the generated list. The relationship type will default to "is part of." If there is not an existing collection record, you must create one; see *Collection Records*.

Related accession

Definition: Identifies the records of accession lots of which this instantiation is part.
As you begin typing the accession number or title, CollectiveAccess will generate a list of existing accession records matching your stem. Select the correct accession lot from the generated list. If there is not an existing accession record, you must create one; see *Accession Records*.

Use of CollectiveAccess software for Northeast Historic Film's CLIR2 Project, *Moving Images 1938-1940: Amateur Filmmakers Record the New York World's Fair and Its Period*

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An Assessment

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for Northeast Historic Film

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1. Introduction

Any collection management tool should perform three major functions: catalog, organize, and provide access to the items within the collection. The purpose of this report is to determine how effectively Northeast Historic Film adhered to metadata standards and used CollectiveAccess software for their CLIR2 Project, *Moving Images 1938-1940: Amateur Filmmakers Record the New York World's Fair and Its Period*. I will assess the overall ability of CollectiveAccess software as used by Northeast Historic Film to catalog, organize, and provide access to this

historic collection of films.

In full disclosure, I formerly worked on CollectiveAccess software from 2009-2011 and was hired by Whirl-i-gig to provide metadata development, customization, and support for clients. I no longer work for Whirl-i-gig or on CollectiveAccess software, and was independently contacted by Northeast Historic Film to write this assessment. Currently, I am the Catalog/Metadata librarian of the University of Vermont.

2. Project Summary

Northeast Historic Film, George Eastman House of International Photography and Film, and the Queens Museum of Art collaborated to contribute content for this project. George Eastman House of International Photography and Film, and the Queens Museum of Art created records directly into the CLIR2 project CollectiveAccess database; while Northeast Historic Film (NHF) records were pushed from their institutional collection management CollectiveAccess database to the CLIR2 project database. This report will focus on NHF's CLIR2 installation of CA, but will also take into consideration the overall use of the software for this project.

An overview of the purpose and scope of the project can be best articulated from its website:

> Original amateur films of the New York World's Fair in 1939-1940 (NWYF), and years preceding World War II (1938-1940), are important primary sources. Describing individual film reels (NYWF) and complete amateur film collections (1938-1940) exposes unknown documents of American life at a time of profound change.
>
> The year 1939 is one of the most important periods in Hollywood filmmaking with release of The Wizard of Oz, Gone with the Wind, The City, and many other canonical Hollywood and avant-garde films. Presenting 1938-1940 amateur film collections allows historians, film researchers, and others access to people's films that are personal documents of travel, home, and community.
>
> (http://www.fairfilm.org/index.php/About/Index)

The value of these rare and unique films is abundantly clear. The CLIR2 project strives to make these films more widely accessible through digital preservation and access of collections and reels of films; as well as adopting standards and best-practices of motion picture archiving.

3. Overview of CollectiveAccess Software

CollectiveAccess is open-source collection management software for cultural heritage institutions such as museums, archives, libraries, and historical societies. It allows for collection control and description through a database for cataloging, and a public website for digital libraries of the items cataloged using the software.

> CollectiveAccess is a highly configurable cataloguing tool and web-based application for museums, archives and digital collections. Available free of charge under the GPL open-source license, it requires little to no custom programming to support a variety of metadata standards, external data sources and repositories, as well as most popular media formats. In addition to multilingual cataloguing facilities, it allows publication of this data in the languages of your choice.

> Current users include representatives from a wide range of fields: fine art, anthropology, film, oral history, local history, architecture, material culture, biodiversity conservation, libraries, corporate archives, digital asset management, and many more. This community of partners has contributed funding, planning and software development resources, resulting in a series of specialist features.
>
> (http://collectiveaccess.org/about/overview)

CollectiveAccess software is built on a relational database using MySQL database software, and utilizes PHP programming to create a dynamic cataloging interface and a public website. Figure 1 is a visualization of the relational database structure for CollectiveAccess. Here you can see that Objects are the central focus with their Representations (Media). Objects can be related to any number of authorities, as well as various ways to manage and organize them. The primary function of CollectiveAccess is to describe Objects and their relationships. However, CollectiveAccess is highly configurable and this primary function can be shifted to any of the other tables if necessary.

As briefly mentioned above, CollectiveAccess software consists of two components: a cataloging "back-end" module called Providence, and a public "front-end" website called Pawtucket. The back-end module stores all the descriptive metadata, media, authorities, relationships, and administrative tasks. The front-end module displays the records through a easily navigable interface of browsing and searching. While Providence can be installed alone and used for collection management, Pawtucket relies on the data stored in Providence to work, so both modules must be installed to have a public website running on CollectiveAccess.

CollectiveAccess is best utilized for complex relational cataloging for cultural heritage collection management. It allows institutions to have a single platform for describing and managing assets, as well as publish them to a public website.

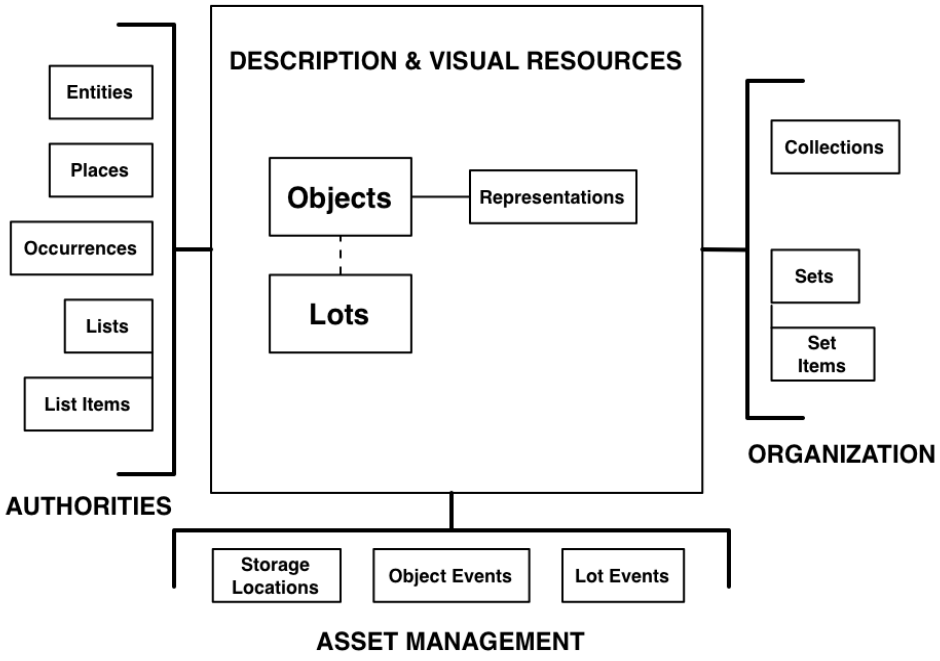

Figure 1 - *CollectiveAccess visualization*

4. Metadata Standards Used in Motion Picture Archiving

There are three kinds of standards for metadata necessary to produce quality cataloging for any kind of resource: Content Standards, Structure Standards, and Value Standards. Content Standards control the form and choice of words for descriptive metadata. Structure Standards control the punctuation and encoding of the metadata. Finally, Value Standards provide terminology control for accessing the metadata. The library equivalent of this convention is Anglo-American Cataloging Rules (AACR2) as the Content Standard; International Standard of Bibliographic Description (ISBD) with MARC21 as the Structure Standard; and Library of Congress authorities and classification as the Value Standards.

Metadata for motion pictures is complicated. The inherent multi-dimensional and layered qualities of motion pictures necessitates a structure than can accommodate the descriptive and technical information needed to accurately describe and provide access to motion pictures. While the AACR2 does contain chapters for cataloging motion pictures and videorecordings, the *Archival Moving Image Materials : A Cataloging Manual* (AMIM2) provides in-depth guidance for cataloging these types of objects. AMIM2 is based on ISBD standards and supplements the AACR2 as the preferred Content Standard for cataloging archival motion picture materials.

PBCore was developed with funding from the Corporation of Public Broadcasting to provide a metadata standard for audio/visual media. Since its release in 2005, PBCore has become the most widely adopted and accepted Structure Standard for cataloging multimedia. The standard is now in version 2.0 with a active user community supporting its continued development.

The strength and utility of PBCore is the nested and relational arrangement of its metadata element set. A PBCoreDescriptiveDocument is separated into four components or *Content Classes*. These are *Intellectual Content*, *Intellectual Property*, *Instantiations*, and *Extensions*. Within the Content Classes there are arrangements of elements and subelements (see Appendix A). PBcore is a metadata schema that is uniquely a Content Standard, Structure Standard, and Value Standard rolled into one. As a Structure Standard, it provides a list of descriptive and technical elements and the necessary XML schema document to validate PBCore XML records. For each of the elements, PBCore provides a definition of usage and suggests controlled vocabularies to use in records; therefore PBCore acts as a Content and Value Standard as well, making this a well-documented and easy to use standard.

EAD (Encoded Archival Description) is an XML-based metadata Structure Standard for creating machine readable finding-aids for archival collections. It is widely used by the archival community for the organization, access, and exchange of archives metadata. DACS (Describing Archives: a Content Standard) is the Content Standard that was developed to work with EAD. DACS clearly outlines the syntax and form for archival descriptions. Archival institutions will often write a DACS based finding-aid and encode that document into EAD for data exchange and access.

Providing access to collections requires authority control of terminology through Value Standards. Value Standards ensure the consistent application of terminology for identifying and consistent use of subjects, names, and place access points. Genre headings by the Library of Congress are often applied to motion picture cataloging, as well as the use of local authorities for unique indexing terms and regional names or places.

5. Assessment of How Effectively NHF Adhered to Metadata Standards and Used CollectiveAccess Software

NHF effectively adhered to metadata standards for motion pictures and used CollectiveAccess software to the best of their ability. They implemented a standards-based metadata application profile that was used to configure CollectiveAccess software. In addition to adhering to industry standards, NHF documented their configuration and workflow. The implementation and cataloging procedures of the CLIR2 project are a fine example of best-practices for creating digital archives for motion pictures.

For the CLIR2 project *Moving Images 1938-1940: Amateur Filmmakers Record the New York Worlds Fair and Its Period,* NHF selected DACS for collection level records, and PBCore as the primary standard for item level cataloging and encoding, EAD for metadata exchange, and LC genre terms with local vocabularies for indexing. NHF also has long-standing use of AMIM2 for item level descriptive cataloging. Table 1 outlines their metadata standards landscape.

Standard Type	**Standards Used by NHF**
Content	PBCore, AMIM2, DACS
Structure	PBCore, EAD
Value	PBCore, LC Genre Terms, Local vocabularies

Table 1

NHF primarily used PBCore as their Content, Structure, and Value Standard for Intellectual Content and Instantiation records. PBCore is a complicated metadata standard, but it can be edited and tailored to fit the descriptive information needed for most motion pictures. It is not required to use all the elements, and so a project can use nearly whatever elements are necessary for a particular configuration or record. NHF edited the 83 top-level elements in PBCore version 1.3 to 30 elements for this project (see Appendix B). Most of the elements are used for Intellectual Content and Intellectual property, but the elements for Instantiations were streamlined to accommodate the kinds of media being cataloged in the collections. NHF used version 1.3 since version 2.0 had not yet been published at the time of project development; however this is not an issue since v1.3 can easily be mapped to v.2.0, and NHF created such a mapping between versions for their custom schema.

DACS is used for collection level cataloging, and EAD will be implemented through a mapping export function in CollectiveAccess software that is still in development. NHF created excellent mapping documents between their PBCore custom schema and EAD. Once the mapping XML export feature in CollectiveAccess is fully functional, it will be able to generate valid EAD XML records on the fly from on their database records through the public website.

The Value Standards used by NHF for this project are well thought out. NHF utilized a curated selection of Library of Congress genre terms, PBCore “picklist” terms, local vocabularies for indexing, and local geographic place names for indexing and navigation.

In addition to adopting industry standards, NHF created an institutional best-practices cataloging manual. The 19 page document outlines how to catalog Collections, Entities (for name authorities), Intellectual Content records, and Instantiation records in CollectiveAccess. It provides comprehensive guidance for cataloging each element at every record level according to the standards set by NHF. It is a wonderful manual that clearly documents how their

standards are used throughout the system.

The cataloging manual created by NHF demonstrates how effectively they adhered to standards in their implementation of CollectiveAccess software. CollectiveAccess is highly configurable software and can be confusing for new users who are not familiar with the database structure and delivery functions. NHF worked with developers to ensure their installation met industry standards and the needs of the project. While there were problems with integration between databases, data export, and customization; these are issues that can be addressed with continued support and further development.

The NHF CLIR2 project is an excellent example of utilizing standards with CollectiveAccess software. Because of the quality metadata in the back-end cataloging module, the public facing website has some very exciting and wonderful features. Users are able to keyword search for films, or browse for them by subjects, people and organizations, places, and collection. Finding films through the World's Fair map is a lovely and creative feature. The digitized streaming media looks great too. It's fun to navigate and watch the old films!

6. Assessment of CollectiveAccess Software for Use in Archiving Motion Pictures

CollectiveAccess (CA) is great software for cataloging, organizing and providing access to motion picture collections. It provides an open source solution for collection management, and is the only fully functional software of its kind currently available. It is ideal software for cultural heritage institutions that need a flexible and affordable way to manage their collections, and (if desired) have curated records accessible through a public website. While there are many features of CA software that support the needs of motion picture archives, there are some issues that should be addressed. This section will outline the highlights and drawbacks of using CA software for cataloging and providing access to motion pictures.

CA is open source software. You can either download it directly from the project website or through GitHub (https://github.com/). While it may be "free," that doesn't mean it comes without costs. An institution choosing to use CA must have the in-house technical expertise, or be able to afford outside consultants to setup, configure the software, and ongoing technical support. An in-house technical expert must know PHP, MySQL, Java, CSS, HTML, and XML - all open and common encoding and programming languages used in contemporary database and website design. If an institution does not have a technical expert in-house, the only other option is to hire an outside consultant.

CA was designed for function, rather than to adhere to standards that can change greatly between industries or mediums. It was designed to be customizable around primary relational tables that only require a identifier and title for each record. Through its customization CA can accommodate any standard. While there may not be exact terminology equivalence between metadata elements, there can be semantic equivalence, and through mapping this facilitates metadata interoperability. However, the mapping import/export function is currently not working in CA. A redesigned tool is expected to be released with version 1.3, and is highly anticipated. Being able to export standards-based valid XML records will greatly facilitate metadata interoperability and data sharing.

While there may be some impediments from keeping institutions from using CA software, the advantages outweigh the drawbacks. At its core functionality, CA provides a customizable platform for describing collections, organizing them through defined authorities, managing them reporting and search tools, and making them available by publishing them online. Standards are

secondary, but necessary and supported by the software. Hopefully soon an XML import/export function will be released.

7. Recommendation for the Future

The primary recommendation for the future is that NHF continue to work with CollectiveAccess developers so that the functionality of the software improves. By collaborating with developers NHF can work to remedy issues with data migration, database configuration, and data export. The metadata mapping function for data import/export is particularly important moving forward with the project to insure that data is interoperable and can be shared with the wider cultural heritage community. To facilitate this continued collaboration, NHF will need more time and additional funding for the project.

8. Conclusions

In conclusion, NHF did a good job of following content, structure, and value standards in their cataloging and implementation of CollectiveAccess for the CLIR2 project. CollectiveAccess software also provides a good platform for describing, organizing, and providing access to these wonderful collections. There is room for improvement with some issues that can be resolved if the institution and the developer continue working together to correct them. Overall the CLIR2 project serves as an excellent resource for accessing rare amateur films from 1938-1940 and the 1939 New York World's Fair.

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PBCore website. Retrieved June 28. 2012, from http://pbcore.org/index.php.

Society of American Archivists., & Hensen, S. L. (2004). *Describing archives: A content standard*. Chicago: Society of American Archivists.

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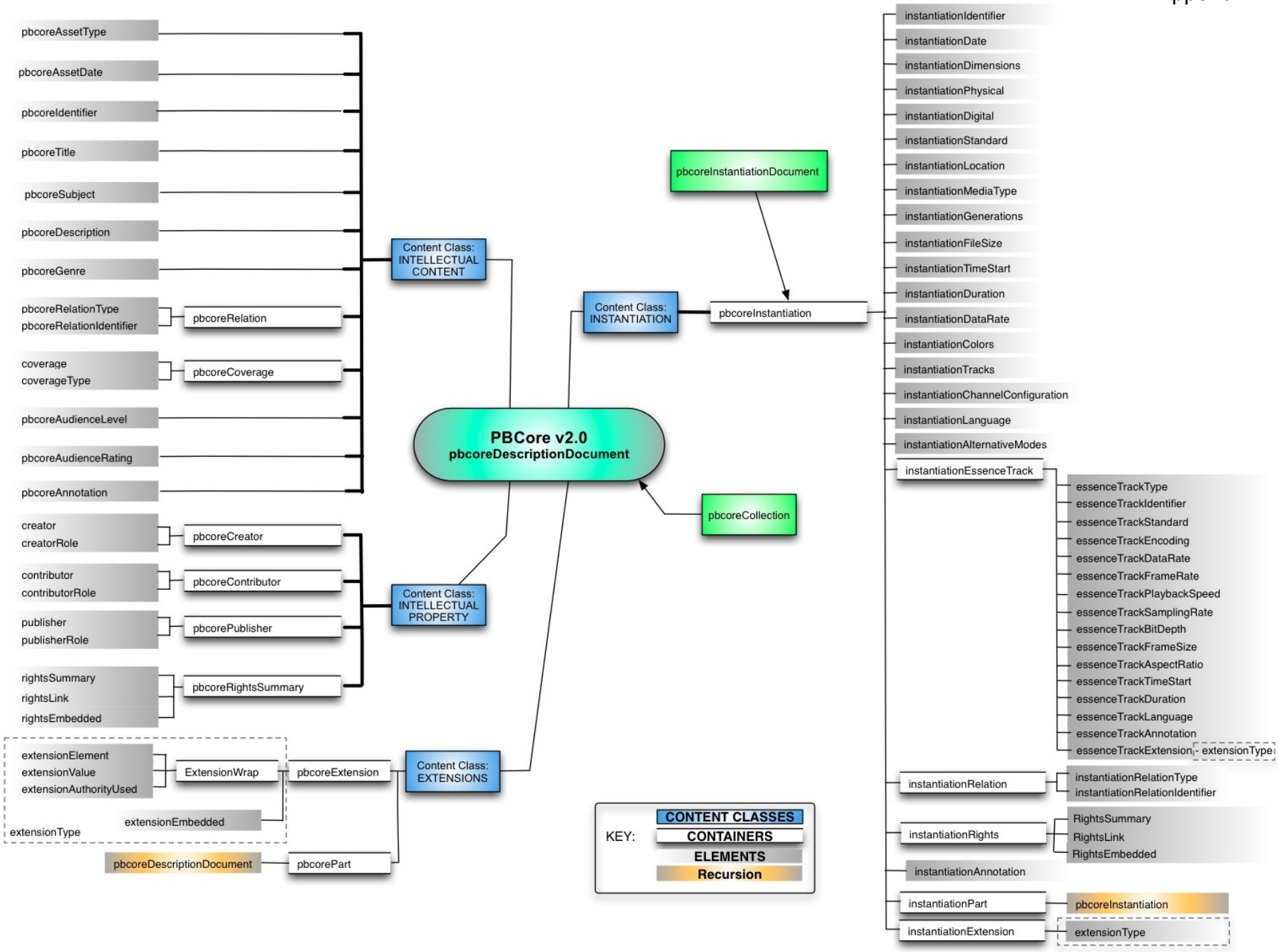
PBCore v2.0
pbcoreDescriptionDocument
Content Class: INTELLECTUAL CONTENT
pbcoreAssetType
pbcoreAssetDate
pbcoreIdentifier
pbcoreTitle
pbcoreSubject
pbcoreDescription
pbcoreGenre
pbcoreRelationType
pbcoreRelationIdentifier
pbcoreRelation
coverage
coverageType
pbcoreCoverage
pbcoreAudienceLevel
pbcoreAudienceRating
pbcoreAnnotation
Content Class: INTELLECTUAL PROPERTY
creator
creatorRole
pbcoreCreator
contributor
contributorRole
pbcoreContributor
publisher
publisherRole
pbcorePublisher
rightsSummary
rightsLink
rightsEmbedded
pbcoreRightsSummary
Content Class: EXTENSIONS
extensionElement
extensionValue
extensionAuthorityUsed
ExtensionWrap
pbcoreExtension
extensionEmbedded
extensionType
pbcoreDescriptionDocument
pbcorePart
Content Class: INSTANTIATION
pbcoreInstantiationDocument
pbcoreInstantiation
instantiationIdentifier
instantiationDate
instantiationDimensions
instantiationPhysical
instantiationDigital
instantiationStandard
instantiationLocation
instantiationMediaType
instantiationGenerations
instantiationFileSize
instantiationTimeStart
instantiationDuration
instantiationDataRate
instantiationColors
instantiationTracks
instantiationChannelConfiguration
instantiationLanguage
instantiationAlternativeModes
instantiationEssenceTrack
essenceTrackType
essenceTrackIdentifier
essenceTrackStandard
essenceTrackEncoding
essenceTrackDataRate
essenceTrackFrameRate
essenceTrackPlaybackSpeed
essenceTrackSamplingRate
essenceTrackBitDepth
essenceTrackFrameSize
essenceTrackAspectRatio
essenceTrackTimeStart
essenceTrackDuration
essenceTrackLanguage
essenceTrackAnnotation
essenceTrackExtension
extensionType
instantiationRelation
instantiationRelationType
instantiationRelationIdentifier
instantiationRights
RightsSummary
RightsLink
RightsEmbedded
instantiationAnnotation
instantiationPart
pbcoreInstantiation
instantiationExtension
extensionType
pbcoreCollection
KEY:
CONTENT CLASSES
CONTAINERS
ELEMENTS
Recursion

Appendix B			**Billey 2012**
CA Table	**Screen**	**CA Element**	**PBCore Mapping**
Occurrences			Intellectual Content
	Basic Info (Intellectual Content)		
		Curatorial Selection	Custom
		Related Collections	Custom
		Related Accession	Custom
		CLIR2 Institution	Custom
		Identifier	pbcoreIdentifier
		Title	pbcoreTitle
		Title Types	pbcoreTitleTypes
		Related Entities	pbcoreCreator, pbcoreContributor
		EntityRelationshipType	pbcoreCreatorRole, pbcoreContributorRole
		pbcorePublisher	pbcorePublisher
		Date Span	No Date in v1.3 - Date added in v2.0
		Description	pbcoreDescription
		Rights	pbcoreRightsSummary
		pbcoreExtensions	pbcoreExtension
		Audience Level	pbcoreAudienceLevel
		Audience Rating	pbcoreAudienceRating
		Access	Customizable CA function
	Index Terms		
		Genre Terms	pbcoreGenre
		Related Vocabulary Terms	Custom
		Georeference	Custom
		Related Places	Custom
	Instantiations		
		Related Objects	CA function
	Relationships		
		Related Collections	CA function
		Related Entities	CA function
	Media		
		Related media	CA function
Objects			Instantiations
	Basic Info (Instantiation)		
		Instantiation Indentifier	pbcoreFormatID
		Related Intellectual Content	CA function
		formatPhysical	formatPhysical
		Format: Location	formatLocation
		Date Issued	dateIssued
		Date created	dateCreated
		Media type	formatMediaType
		formatGenerations	formatGenerations
		Sound/Silent	Custom
		Format: Duration	formatDuration
		Format: Aspect Ratio	essenceTrackAspectRatio
		Format: Frame Rate	essenceTrackFrameRate
		Format: Colors	formatColors
		Format: Tracks	formatTracks
		Language	language
		EssenceTrack	pbcoreEssenceTrack
		Date Available	pbcoreDateAvailable
		Annotation	pbcoreAnnotation
		Access	CA function
		Source	CA function

	Media		
		NOT USED	
	Relationships		
		Related Collections	CA function
		Related accessions	CA function
		Related Entities	CA function
		Related Intellectual Contect	CA function
		Related Instantiation	CA function