APPENDIX 4 -

Worksheet: Creating your organization's data standards guide

The intent of this worksheet is to help you complete a Data Standard Guide before you review and assess your data. Be sure to review section 3-4 of this guidebook ending on the steps to create your organization's data standards guide before attempting to work through this worksheet.

DOCUMENTING YOUR CHOSEN STANDARDS AND CREATING A CLEAR QUICK REFERENCE GUIDE FOR THEM.

Step 1 & 2 on the instructions asked you to choose your fields and field formats (standards), crosswalk them with your CMS fields if you are using a CMS, and document them at the beginning of your data standards guide. Below is an example from an organization using the PastPerfect CMS.

Dublin Core Fields	DACS Content Standard	CCO Content Standard	PastPerfect
Identifier			Object ID; Other Number
Publisher	Reference Code Element (2.1); Name and Location of Repository Element (2.2)	Current Location (5.2.1)	Collection; Home Location
Title	Title Element (2.3)	Title (3.1)	Object Name; Title
Creator	Name of Creator(s) Element (2.6); Administrative/Biographical History Element (2.7 added value)	Creator (2.2.1); Creator Role (2.2.2)	Artist, Author, Creator, Photographer
Date	Date Element (2.4)	Creation Date (4.2.3)	Date
Type	Extent Element (2.5)	Work Type (1.2)	Type
Description	Scope and Content Element (3.1)	Description (8.2.1)	Description
	Conditions Governing Access Element (4.1)		
Language	Languages and Scripts of the Material Element (4.5)		n/a
Subject	Access points (See Overview of Archival Description)	Subject (4.1); Classification (7.2.1)	People, Subjects, Classification Search terms
Rights Management	Conditions Governing Reproductions and Use (4.4 added value)		Notes & Legal > Legal Status or Web Rights
Relation	Related Archival Materials (6.3 added value)		Relations
Format		Measurement (3.2.1); Materials and Techniques (3.2.2)	Dimensions; Material; Technique
Current Location		Current Location (5.2.1)	Location > Temporary location

If the standards discussion is still scary, the most important thing is to document what fields of information you are collecting. This next step will help you really nail down what consistent information and format you will have for each field.

CREATE INSTRUCTIONS FOR EACH FIELD

Be sure to review the table is section 3. The goal is to document instructions for each field so that you have that nailed down and can reference this guide in your review. This can be done in several formats and will vary based on the individual decisions you may make for each field your organization chooses. Below are some templates to consider.

Document format

Write down or type a document with the following information:

Field Name:
Field Definition:
Field Format:
Recommended or Required?
Is there a controlled vocabulary for this field? If yes, include reference to that list or attach it.
Are there instructions, standards, things to avoid for this field?
Provide good examples of data for this field

Spreadsheet format

Create a spreadsheet in excel or a similar program that has instructions for each field similar to the example below:

Field Name	Field Definition	Field Format	Recommended or Required	Is there a controlled vocabulary	Are there instructions, standards, things to avoid for this field?	Provide good examples of data for this field

Table Format

Create a table like the one below for each field.

Field Name:	
Field Definition	
Field Format	
Recommended or Required?	
Is there a controlled vocabulary for this field? If yes, include reference to that list or attach it.	
Are there instructions, standards, things to avoid for this field?	
Provide good examples of data for this field	

FINAL STEPS

Once you have done all of this work, be sure to keep it all together for you review process. You may also consider attaching it to any policies or procedures associated with your collection as you have also just completed a guide to entering new information to your database to avoid future problematic collection data issues.