Best Guess Guidelines for Cataloguing Born Digital Material

Descriptive Standards Roundtable

2016
Table of contents

Introduction 3
Acknowledgements 3
General Principles 4

3.1.1 Reference code(s) 5
3.1.2 Title 6
3.1.3 Date(s) 7
3.1.4 Level of description 8
3.1.5 Extent and Medium 9
3.2.1 Name of creator(s) 9
3.2.2 Administrative/Biographical history 10
3.2.3 Archival history 10
3.2.4 Immediate source of acquisition or transfer 11
3.3.1 Scope and Content 11
3.3.2 Appraisal, destruction and scheduling information 12
3.3.3 Accruals 12
3.3.4 System of Arrangement 13
3.4.1 Conditions governing access 14
3.4.2 Conditions governing reproduction 14
3.4.3 Language/scripts of material 15
3.4.4 Physical characteristics and technical requirements 15
3.4.5 Finding aids 16
3.5.1 Existence and location of originals 16
3.5.2 Existence and location of copies 17
3.5.3 Related units of description 17
3.5.4. Publication note 18
3.6.1 Note 18
3.7.1 Archivist’s note 19
3.7.2 Rules or conventions 19
3.7.3 Date(s) of descriptions 19
Introduction
In January 2013, a conversation was initiated under the aegis of the Section for Archives and Technology which became known as the Descriptive Standards Roundtable. Over the past three years UK archives practitioners have been brought together under this umbrella on a number of occasions (UKAD Forums 2013 and 2014, ARA Conferences 2013 and 2014 and a special event on Cataloguing Born Digital Material held in November 2014) to discuss the issues and challenges that are arising as cataloguing practice evolves in the face of born digital material. As a result of these meetings, a consensus was reached as to the main issues arising in this area. This consensus is summarised in the issues log (available here - http://www.archives.org.uk/community/groups/viewdiscussion/75-issues-log-have-a-look.html?groupid=43) and the record of the November event (available here - http://www.archives.org.uk/about/sections-interest-groups/archives-a-technology/news-and-events-sp-1847188959.html) In both documents the need to address the adaption of ISAD(G) – as the most explicit manifestation of cataloguing best practice – to born digital material has been raised. To this end a speed writing event was held at a UKAD Workshop in London on 18th March 2016, which resulted in this draft document being produced. It is being published now for wider consultation and all comments on it should be returned to Jenny Bunn, j.bunn@ucl.ac.uk by the end of July 2016.

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General Principles

- These guidelines provide advice on creating descriptions for born digital material within cataloguing and access systems which employ a framework/structure based on the General International Standard of Archival Description ISAD(G). It is anticipated that archival institutions will want to include such descriptions within pre-existing systems of this kind in order to ensure continuity and parity between the description of their analogue and of their born digital holdings.

- This document does not provide detailed guidance on or a complete list of all the metadata thought to be required in order to ensure the ongoing preservation of born digital material. Such material may be held in a separate digital repository system (where such a system could be either a commercial or open source software application or an archivist following procedures to ‘ingest’ born digital material onto a backed-up shared drive or other storage solution) and the metadata that should be included in, or created by such systems is beyond the scope of this guidance. However some suggestions have been made with regards to possible links to more detailed metadata of this kind and the alternative metadata schemas which might be used to structure such metadata.

- The advent of born digital material and of new tools for its processing opens up the possibility for the automatic creation of description. As a general principle, it is considered important that users are made aware of the degree of human intervention in the information they are looking at, e.g. if a field has been populated automatically with no human intervention, this needs to be made clear.
3.1.1 Reference Code

ISAD(G) says:
Purpose - To uniquely identify the unit of description and to provide a link to the description that represents it.

Rule – Record as necessary for unique identification, the following elements:

- The country code in accordance with the latest version of ISO 3166 Codes for the representation of names of countries
- The repository code in accordance with the national repository code standard or other unique location identifier
- A specific local reference code, control number, or other unique identifier

All three elements must be present for the purpose of information exchange at the international level.

We say:
For information exchange at the international level, it is now necessary to consider the wider discourse around persistent identifiers. See the following for an archivist friendly (but slightly out of date) introduction to this topic - [http://www.paradigm.ac.uk/workbook/metadata/pids.html](http://www.paradigm.ac.uk/workbook/metadata/pids.html). It is suggested that individual repositories should take and then publish the approach they choose to adopt to address this issue. For example, the Archives Hub explain their approach and reasoning here - [http://archiveshub.ac.uk/identifiers/](http://archiveshub.ac.uk/identifiers/)

For born digital archives, it is also likely that identifiers may be automatically generated on ingest, e.g. see the ‘System No.’ as recorded on this catalogue entry for material held at the Wellcome Library;


As can also be seen from this entry, what is perhaps starting to emerge is that there may need to be multiple ‘unique’ identifiers for the same thing. Consequently there may also be a need to distinguish between (and link together in some way) unique identifiers proper (possibly further complicated by the need for internal unique identifiers - possibly system generated - and external – for international information exchange purposes – identifiers in line with one of the persistent identifier schemes commonly in use on the internet more widely) and archival reference codes (which as we know are not just identifiers but also a means of conveying information about the contextual placing of the unit of description in an intellectual hierarchy).

Archival reference codes reflecting traditional ‘arrangement’ will however continue to be necessary, at least for hybrid archives where the decision is taken to include digital material
within existing arrangements, but the practice poses difficulties (see further notes under system of arrangement).

As a general principle, archives are encouraged to think more in terms of identification using (potentially) more than one identifier rather than single traditional archival reference codes. Identifiers should not be allowed to multiply excessively though and the aim should always be for the minimum number possible, whilst maintaining clarity of purpose for any identifiers created. Care should be taken to ensure that where identifiers are being asked to convey information beyond simple identity this is properly understood and the implications considered, e.g. if you add in elements to reference codes to indicate whether the item being described is digital or not, or to indicate if the code has been machine generated or not, will that confuse matters later or not?

It should also be remembered that, in the case of born digital material, it is quite possible that there will be multiple versions or manifestations of the ‘same’ thing, e.g. an access copy and a preservation copy, or an ‘original’ version and a number of migrated versions.

3.1.2 Title

ISAD(G) says:

Purpose - To name the unit of description

Rules – Provide either a formal title or a supplied title in accordance with the rules of multilevel description and national conventions. If appropriate abridge a long formal title, but only if this can be done without loss of essential information. For supplied titles, at the higher level, include the name of the creator of the records. At lower levels one may include, for example, the name of the author of the document and a term indicating the form of the material comprising the unit of description and, where appropriate, a phrase reflecting function, activity, subject, location, or theme. Distinguish between formal and supplied titles according to national or language conventions.

We say:

For born digital archives, we are a bit torn. On the one hand we do feel that what should be used as the title is the original file name in use when the material is accessioned/ingested. This will allow for the automatic population of this field (a pragmatic need) but also is more in tune with our sense that the original title should always be protected and privileged over any supplied title.

However, we recognise that we are then totally reliant on the quality of the original file naming, and may well end up with some very ‘unhelpful’ file names, such as ‘My stuff’ or, something like this ‘2222_0040_0002_532.tif’ (a real example again from the Wellcome Library - http://archives.wellcomelibrary.org/DServe/dserve.exe?dsqIni=Dserve.ini&dsqApp=Archive&dsqDb=Catalog&dsqCmd=show.tcl&dsqSearch=%28RefNo==%27GRLIDN%2FF%2F4%27%29)
On the flip side (and perhaps less problematically), where file naming conventions are consistently enforced we may also come across occasions when date information is duplicated within the title field, e.g. at TfL the conventions are to always include the date in the file name.

Given the scale we face however, we think it is likely that pragmatism will win out and that the ‘norm’ will be for this field to be filled automatically with whatever file name is given by the creators/users. Archives may of course take the view that, where possible (and even though the feeling is that it will never be possible) meaningless titles will be supplemented with further more meaningful detail. This will, however, lead to some inconsistency in practice. Perhaps we should just cut our losses now and say that the title field is the file name, and we know this will result in some meaningless titles, but there you go. Where we can we will try to add in more meaningful description to the scope and content field and this will have implications for perhaps adding scope and content to the minimum mandatory fields for information exchange.

The same will be true with regard to original folder names, where the decision has been taken to replicate a pre-existing directory structure within the arrangement of a collection, e.g. http://archives.wellcomelibrary.org/DServe/dserve.exe?dsqIni=Dserve.ini&dsqApp=Archive&dsqDb=Catalog&dsqCmd=show.tcl&dsqSearch=%28RefNo==%27GRLIDN%2FF%2F22%27%29

The decision as to whether directory structures should be so replicated or not is discussed in notes under system of arrangement.

3.1.3 Date field

ISAD(G) says:
Purpose – To identify and record the date(s) of the unit of description

Rules – Record at least one of the following types of dates for the unit of description, as appropriate to the materials and the level of description.

- Date(s) when records were accumulated in the transaction of business or the conduct of affairs;
- Date(s) when documents were created. This includes the dates of copies, editions or versions of, attachments to, or originals of items generated prior to their accumulation as records.

Identify the type of date(s) given. Other dates may be supplied and identified in accordance with national conventions. Record as a single date or a range of dates as appropriate. A range of dates should always be inclusive unless the unit of description is a record-keeping system (or part thereof) in active use.
We say:
For born digital archives, the aim should be to automatically capture and record both Date created and Date last modified. Either or both can be displayed in the date field, although neither may actually bear any resemblance to what we chose to call the ‘meaningful’ date – the date of the content. Date last modified, for example, may actually be the date of the last major system migration.

Once again then, our desire to provide meaningful dates to users will need to be balanced with pragmatism as to look at every single file and create ‘meaningful’ dates will probably be impossible. The general principle is then to make it clear which sort of date (or dates) are being supplied and how reliably they can be taken to represent the meaningful date, e.g. see the note in the description field of this entry;

http://archives.wellcomelibrary.org/DServe/dserve.exe?dsqIni=Dserve.ini&dsqApp=Archive&dsqDb=Catalog&dsqCmd=show.tcl&dsqSearch=%28RefNo==%27PPMIA%2F2%2F3%2F6%2FF18%27%29

We also spoke briefly about having a pop up that asked users to enter or confirm a meaningful date if they looked at the file.

3.1.4 Level of description

ISAG(G) says:
Purpose – To identify the level of arrangement of the unit of description

Rule – Record the level of this unit of description

We say:
This field has always been for the archivists and it is questionable if users have ever understood what it means. Where born digital material is being incorporated into existing arrangements it will be necessary for a decision to be made as to what ‘level’ it fits in at for the purpose of consistency with past practice. It is questionable however, whether this past practice is entirely appropriate or translatable to collections of wholly born digital material (e.g. Web Archives are often ‘arranged’ thematically – http://www.webarchive.org.uk/ukwa/collection/) and our attitudes to it probably need to evolve in the near future.

For the sake of consistency, where born digital material is being assigned a level, it is probably an idea to try to ensure that the level which is normally the deliverable unit for paper material (be that file or item level) is also the level which is normally the deliverable unit for born digital material.
3.1.5 Extent and Medium

**ISAD(G) says:**

**Purpose** – To identify and describe a) the physical or logical extent and b) the medium of the unit of description.

**Rules:** Record the extent of the unit of description by giving the number of physical or logical units in Arabic numerals and the unit of measurement. Give the specific medium (media) of the unit of description. Alternatively, give the linear shelf space or cubic storage space of the unit of description. If the statement of extent for a unit of description is given in linear terms and additional information is desirable, add the additional information in parentheses.

**We say:**

The relationship between physical or logical units is not at all straightforward with born digital material, and the question of medium is similarly complex. This complexity is probably better dealt with elsewhere (e.g. see notes under 3.4.4 Physical characteristics and technical requirements). Users may or may not be interested in this complexity, but for the sake of consistency this field should only be used to present a simple (and human commonsense) view of extent and medium such that a user will be able to get a sense of the size and sort of stuff they would be dealing with if they were to ‘order’ the unit of description up (in the access version if that is different from the preservation version), e.g. something like 10,321 files; 14.6GB or 1 digital file.

3.2.1 Name of Creator(s)

**ISAD(G) says:**

**Purpose:** To identify the creator (or creators) of the unit of description.

**Rule:** Record the name of the organization(s) or the individual(s) responsible for the creation, accumulation and maintenance of the records in the unit of description. The name should be given in the standardized form as prescribed by international or national conventions in accordance with the principles of ISAAR(CPF).

**We say:**

The archival concept of creation/provenance is a complicated one, and it becomes even more complicated once you start bringing in the idea of authorship as recorded in the file level metadata in many digital documents. Theoretically it would be great to be able to automatically capture the ‘creator’ or ‘author’ of born digital material but what non-archive systems mean by and the way in which they apply such terms is not the same as what archivists mean when they talk about the ‘creator’. The unexamined question has long been to what extent capturing the ‘name of the creator’ or even multiple names of creators actually helps to maintain the sort of provenancial and contextual information archivists want to preserve. We might have been able to fudge a workable compromise in the
analogue environment, but it remains to be seen how our aims can be best met in the digital environment. For the time being therefore, it might be best when placing born digital material within existing arrangements, to try to mimic past practice in what is presented (possibly relying on inheritance from higher levels), whilst perhaps capturing automatically any existing file level metadata for the ‘creator’ with a view to working out if it might be meaningfully translated into the archival context.

3.2.2 Administrative/Biographical History

ISAD(G) says:
Purpose – To provide an administrative history of, or biographical details on, the creator (or creators) of the unit of description to place the material in context and make it better understood.

Rules – Record concisely any significant information on the origin, progress, development and work of the organization (or organizations) or on the life and work of the individual (or individuals) responsible for the creation of the unit of description. If additional information is available in a published sources, cite the source.

The Information Areas of ISAAR(CPF) suggest specific informational elements that may be included in this element.

We say:
It is probably best to follow past practice at supplying administrative/biographical histories for the time being.

3.2.3 Archival history

ISAD(G) says:
Purpose – To provide information on the history of the unit of description that is significant for its authenticity, integrity and interpretation.

Rules – Record the successive transfers of ownership, responsibility and/or custody of the unit of description and indicate those actions, such as the history of the arrangement, production of contemporary finding aids, re-use of the records for other purposes or software migrations, that have contributed to its present structure and arrangement. Give the dates of these actions, insofar as they can be ascertained. If archival history is unknown, record that information. Optionally, when the unit of description is acquired directly from the creator, do not record an archival history but rather, record this information as the Immediate source of acquisition (See 3.2.4.)
Best Guess Guidelines for Cataloguing Born Digital Material

We say:
For born digital material, the information required to fulfil the purpose of this element is extensive and complex. As a general principle, the ‘archival history’ of born digital material does not stop at any point, but is a continuous process of preservation actions, such as integrity checking and possibly migration to newer formats or media, carried out both before and after the material is accessioned into the archive. Practice is still emerging but it is suggested that there may need to be different views of the information recorded under this heading for different purposes. For example, it may need to be explained in summary in human terms and then also recorded as a machine readable ‘audit trail’ of preservation actions perhaps using PREMIS http://www.loc.gov/standards/premis/v3/index.html. These machine readable versions may be automatically generated (either by the archive service’s, or earlier custodians’ systems) and held in separate digital repository systems, to which the catalogue may or may not link. Then again, it may be that a link could be included in this field to any photographs held of the original media on which the material was stored as this is legitimately part of the Archival History.

3.2.4 Immediate source of acquisition or transfer

ISAD(G) says:
Purpose – To record the immediate source of acquisition or transfer.

Rule – Record the source from which the unit of description was acquired and the date and/or method of acquisition if any or all of this information is not confidential. If the source is unknown, record that information. Optionally, add accession numbers or codes.

We say:
Source in this instance should be seen as a human one. Details of the (software) application from which born digital material was acquired and how that was managed, etc. should go in Archival History (3.2.3). Here, simply record the type of deposit, the legal custodian of the material who has donated or loaned the material, the date of the transfer and the accession number, in accordance with past practice.

3.3.1 Scope and content

ISAD(G) says:
Purpose – To enable users to judge the potential relevance of the unit of description.

Rule – Give a summary of the scope (such as, time periods, geography) and content, (such as documentary forms, subject matter, administrative processes) of the unit of description, appropriate to the level of description.
We say:
For born digital material, what goes in scope and content will depend on the decision taken with regards to the title field. We have suggested that the title field should be automatically populated with the inherited title of the digital file being described, however meaningless that may be. If this rule is implemented, scope and content then becomes the place where further explanation is given to help to make the title meaningful.

3.3.2 Appraisal, destruction and scheduling information

ISAD(G) says:
Purpose – To provide information on any appraisal, destruction and scheduling action.

Rules – Record appraisal, destruction and scheduling actions taken on or planned for the unit of description, especially if they may affect the interpretation of the material. Where appropriate, record the authority for the action.

We say:
There is overlap between this field and the way we have interpreted Archival History (3.2.3). Information about appraisal, destruction and scheduling may form part of both, or either of, the human readable summary and the machine readable ‘audit trail’ discussed in the notes to that field. The general principle should be to avoid excessive duplication, whilst maintaining consistency with past practice. One possible solution might be to use Archival History as the place to summarise any appraisal, destruction and scheduling action and then to use this field as the place for maintaining a formal record of all the material that has been destroyed, when it was destroyed, and on whose authority (perhaps via a link to a deaccessioning database?)

3.3.3 Accruals

ISAD(G) says:
Purpose – To inform the user of foreseen additions to the unit of description.

Rule - Indicate if accruals are expected. Where expected, give an estimate of their quantity and frequency.

We say:
It is probably best to follow past practice in populating this field. Users will still find it useful to know if more material is going to come in at a later date. On a side issue, it should be noted that experience with born digital accruals to date has shown that you are much more likely than with paper, to get duplication with earlier accessions, e.g. a later snapshot of the same hard drive will have much of the same content.
3.3.4 System of Arrangement

ISAD(G) says:
Purpose – To provide information on the internal structure, the order and/or the system of classification of the unit of description.

Rule – Specify the internal structure, order and/or the system of classification of the unit of description. Note how these have been treated by the archivist. For electronic records, record or reference information on system design. Alternatively, include any of this information in the Scope and Content element (3.3.1) according to national conventions.

We say:
For born digital material, the issue of arrangement remains largely unresolved and practice will often need to be decided (in the context of hybrid archives) in terms of what fits best with existing arrangements of paper material. For born digital material which has been ‘arranged’, e.g. into a folder structure, a decision will need to be taken as to the extent to which this folder structure should or should not be replicated as levels of arrangement/description. Again, there is a tension between wishing to retain what might be regarded as ‘the original order’ and wishing not to reproduce very complex, deep and potentially meaningless folder structures.

Whatever decision is taken, it should be documented here in a human readable summary. Some scenarios of different degrees of intervention/arrangement with accompanying examples of the sort of thing that might be included in this element are given below:

1) No intervention by the archivist
The original order of the material has been retained without any intervention by the archives staff. This does mean that the collection may include file names containing spelling mistakes and duplicate files that were placed in the wrong folder(s) by the creator.

2) Minimal intervention by the archivist
The original order of the material has been retained without any intervention by the archives staff. With the material being received over time from the depositors some automatic processing has been undertaken to identify and remove files that are exactly the same as files already contained within the archive.

3) Intervention by the archivist
The original order of the material as received by the archive service has not been retained as the arrangement of the material reflected the creator's current working practice. The material has been re-organised following consultation with the depositor into an order comprising a number of sections and sub-sections to allow subsequent digital material to be easily integrated into a single system of arrangement.

4) Post ingest intervention
The material was ingested into our digital repository in its original order. As part of the processing work conducted by the archives staff some intellectual reorganisation of the material was undertaken to allow subsequent material to be easily integrated into a single system of arrangement.

The arrangement presented here is a result of this intervention by archives staff, but the original file paths are recorded in the descriptions at lower levels. [The file path would then be added to the system of arrangement field at those lower levels].

N.B. There is potential for overlap between this field and Archival history (3.2.4). Duplication may not be avoidable, but whereas Archival history provides as complete a record as possible of the actions undertaken on the material, both before and after its arrival at the archive, System of arrangement relates to recording decisions on arrangement only and to explaining what the arrangement (or perhaps more accurately the level of processing) is so that its impact on the material can be assessed.

3.4.1 Conditions governing access

ISAD(G) says:
Purpose – To provide information on the legal status or other regulations that restrict or affect access to the unit of description.

Rule – Specify the law or legal status, contract, regulation or policy that affects access to the unit of description. Indicate the extent of the period of closure and date at which the material will open when appropriate.

We say:
It is probably best to follow past practice in populating this field as legal status constrains access to born digital material in a similar way to analogue material. N.B. Practical details of how to access born digital material should be explained under Physical characteristics and technical requirements (3.4.4).

3.4.2 Conditions Governing Reproduction

ISAD(G) says:
Purpose – To identify any restrictions on reproduction of the unit of description.

Rule - Give information about conditions, such as copyright, governing the reproduction of the unit of description after access has been provided. If the existence of such conditions is unknown, record this. If there are no conditions, no statement is necessary.

We say:
Even if there are no conditions, or the conditions are unknown, a statement of this fact is still necessary. For born digital material, particularly that available online, much more detail
is needed about conditions of reproduction and re-use. Conditions of attribution, distribution, adaptation and commercial re-use should be covered and ideally a commonly recognised license should be employed, e.g. Open Government Licence or Creative Commons Attribution-NonCommercial CC BY-NC. This license lets others remix, tweak, and build upon your work non-commercially, and although their new works must also acknowledge you and be non-commercial, they don’t have to license their derivative works on the same terms.

This is another element where there may be different views of the information – a human readable summary and a machine readable version. These machine readable versions may be held in separate digital repository systems, to which the catalogue may or may not link. using PREMIS (Rights entity) http://www.loc.gov/standards/premis/v3/index.html.

3.4.3 Language/scripts

ISAD(G) says:
Purpose – To identify the language(s), script(s) and symbol systems employed in the unit of description.

Rule – Record the language(s) and/or script(s) of the materials comprising the unit of description. Note any distinctive alphabets, scripts, symbol systems or abbreviations employed. Optionally, also include the appropriate ISO codes for language(s) or script(s)

We say:
For born digital material, there is potential for confusion with regards to this element as there are also computer languages and scripts. For avoidance of doubt, this field should be populated on the assumption that the language and scripts are to be understood in human readable and textual terms only. Details of more technical languages e.g. javascript, SQL, should not be recorded here. Rather it is anticipated that such details will be dealt with under 3.4.4 Physical characteristics and technical requirements.

3.4.4 Physical characteristics and technical requirements

ISAD(G) says:
Purpose – To provide information about any important physical characteristics or technical requirements that affect use of the unit of description.

Rule – Indicate any physical conditions, such as preservation requirements that affect the use of the unit of description. Note any software and/or hardware required to access the unit of description.

We say:
For born digital material the information required to fulfil the purpose of this element is both extensive and complex. It may also be necessary to continually revisit this field as the
impact of technical requirements on access may change over time. Practice is still emerging but it is suggested that there may need to be different views of the information recorded under this heading for different purposes. For example, it may need to be explained in summary in human terms and then also recorded in machine readable terms.

The human readable summary should explain physical characteristics and technical requirements in the context of access, e.g. if there is an access copy and a preservation copy of a digital object it may be necessary to explain that what will be accessed is a version of the object that has been prepared for access purposes (with perhaps implications for reduced functionality). Where appropriate, details should be given of whether and how users can access the preservation copy if they require the lost functionality.

The machine readable and more detailed version of the information may be automatically generated (either by the archive service’s, or earlier custodians’ systems) and held in separate digital repository systems, to which the catalogue may or may not link. It is envisaged that such information may be recorded using PREMIS http://www.loc.gov/standards/premis/v3/index.html.

3.4.5 Finding aids

ISAD(G) says:
Purpose - To identify any finding aids to the unit of description.

Rule - Give information about any finding aids that the repository or records creator may have that provide information relating to the context and contents of the unit of description. If appropriate, include information on where to obtain a copy.

We say:
We take the scope of this field to extend to any finding aids that are known to exist (not just those that are held by the repository or records creator). If the finding aid is a website its URL and the date last accessed should be given. It should be noted that finding aids do not always take on ‘traditional’ textual forms, e.g. the way into a set of documents may be a map or an architectural drawing. We would also like to suggest that a possible extension to the use of this field might be (at higher levels) to note where descriptions have been submitted to aggregators and gateways (e.g. APE or Archives Hub).

3.5.1 Existence and location of originals

ISAD(G) says:
Purpose – To indicate the existence, location, availability and/or destruction of originals where the unit of description consists of copies.
Rule – If the original of the unit of description is available (either in the institution or elsewhere) record its location, together with any significant control numbers. If the originals no longer exist, or their location is unknown, give that information.

We say:
For born digital material, the concept of the ‘original’ is disputed and unhelpful. The use of this element for born digital material should be avoided if at all possible. The more technical details of migrations and potentially multiple manifestations of the material being described should be probably be dealt with out with the catalogue (in a separate digital repository systems). Summaries of aspects of this information will be given, as appropriate in other elements including Physical characteristics and technical requirements (3.4.4) and Archival history (3.2.3). Where copies (deemed original or not) of the material are known to be held out with the institution (and its digital repository system) these may referenced in either, Existence and location of copies (3.5.2) or Publication note (3.5.4).

3.5.2 Existence and location of copies:

ISAD(G) says:
Purpose – To indicate the existence, location and availability of copies of the unit of description.

Rule – If the copy of the unit of description is available (either in the institution or elsewhere) record its location, together with any significant control numbers.

We say:
For born digital material, we feel that this field needs to be applied slightly differently. The institution may well have multiple copies of any particular digital object (separate access and preservation copies, multiple versions of each etc.) Details of all these copies will be held, but probably out with the catalogue. Users may be interested in these details or they may not, but the places in which they will be referenced for the user include the elements Physical characteristics and technical requirements (3.4.4) and Archival history (3.2.3). Copies for born digital material should be taken to mean copies/versions of the material held out with the institution which are not on open access online (since this is taken to mean that they are published – see Publication note (3.5.4)). For example, it is often the case with personal ‘papers’ that the creator will retain a copy of all the material given to the archive.

3.5.3 Related units of description

ISAD(G) says:
Purpose – To identify related units of description
Rule – Record information about units of description in the same repository or elsewhere that are related by provenance or other association(s). Use appropriate introductory wording and explain the nature of the relationship. If the related unit of description is a finding aid, use the finding aids element of description (3.4.5) to make the reference to it.

We say:
For born digital materials, related units of description should be used in roughly the same way. We wondered though, if there was less need for the element now, as more and more descriptions are being aggregated and published online, such that they can be found more easily using, e.g. Archives Hub, TNA Discovery, Google etc.

3.5.4 Publication Note

ISAD(G) says:
Purpose - To identify any publications that are about or are based on the use, study or analysis of the unit of description

Rule - Record a citation to and/or information about a publication that is about or based on the use, study, or analysis of the unit of description. Include references to published facsimiles or transcriptions.

We say:
For born digital materials, this element should be used in roughly the same way. However, it should be noted that what constitutes ‘publication’ has changed. This element should record all instances of publication (print or online) and should use appropriate citation for online publication, e.g. where possible, a doi, URL etc. If linking to a website, also record the date last accessed and consider periodic link checking.

3.6.1 Note

ISAD(G) says:
Purpose – To provide information that cannot be accommodated in any of the other areas.

Rule – Record specialized or other important information not accommodated by any of the defined elements of description.

We say:
We hope that the expansion of the currently existing fields we have suggested will cut down on the tendency to use the "note" field for the ‘extra’ information necessary for born digital material. The note field should be used as little as possible, although we do recognise that there are instances where it is the only option, e.g. TNA have used the note field for acknowledgements, e.g. to a funder of cataloguing work.
3.7.1 Archivist’s Note

**ISAD(G) says:**
Purpose – To explain how the description was prepared and by whom
Rule – Record notes on sources consulted in preparing the description and who prepared it

**We say:**
For born digital materials, this element should be used in roughly the same way, with the addition of information about which elements have been automatically populated and the degree of human intervention in the construction of the description.

3.7.2 Rules or Conventions

**ISAD(G) says:**
Purpose - To identify protocols on which description based
Rule – Record the international, national, and/or local rules or conventions followed in preparing the description.

**We say:**
For born digital materials, this element should be used in roughly the same way, although there may need to be reference to a more varied set of rules. Perhaps we should also be honest and say when we haven’t followed any rules or when we have only followed them very loosely?

3.7.3 Date(s) of Descriptions

**ISAD(G) says:**
Purpose - To indicate when this description was prepared and/or revised
Rule - Record the date(s) the entry was prepared and/or revised.

**We say:**
For born digital materials, this element should be used in roughly the same way.