



NIMAC Metadata Guidelines

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How to Use This Guide

The information in this document is to assist those who are preparing files for submission to the NIMAC. It will help ensure that the metadata supplied with the files are complete, accurate, and properly formatted.

Included are the details of the metadata elements in the NIMAC metadata schema. Some elements are required, while others are optional. Each section includes a description of the element, the correct OPF tags, and examples of how to format the data correctly.

What this guide is not: This guide does not contain detailed technical information on how to construct valid XML files. For information on the technical aspects of the file specification, please refer to the resources provided by CAST:

<http://aim.cast.org/learn/practice/production/creatingnimas>

Providing Files to the NIMAC

1. File Submission

All vendors are STRONGLY ENCOURAGED to thoroughly review the following documentation before submitting file sets. Files must be submitted in accordance with established procedures and requirements. **All of the documents below can be downloaded at any time from the Support tab in the publisher portal:**

1. This **NIMAC Metadata Guidelines document**
2. Two instructional **PowerPoints** that walk you through the system and explain the file submission procedures:
 - a. **NIMAC 2.0 Publisher Portal: Managing Inventory**
 - b. **NIMAC 2.0 Publisher Portal: Batch File Submissions**
3. The **OverDrive Metadata Excel spreadsheet template**. This metadata file must accompany **all** batch deliveries.

2. File Validation

The NIMAC Validation Wizard is a stand-alone, Windows-based program that can also be downloaded from the publisher portal

Support tab. **All files must be checked using this validation tool before they are submitted to the NIMAC.** Files that do not pass validation will not be uploaded to the NIMAC and submitting invalid or corrupt files will cause a delay in the processing of the batch delivery.

Important Note: Automated validation is only the first step of the certification process. Files also undergo a manual quality and metadata check by NIMAC staff. A file that passes XML validation may still be rejected due to incomplete or incorrect metadata, or other problems with the NIMAS file set.

3. Zip File Naming Convention

- Each NIMAS zip file must be named with its NIMAS Identifier (e.g., 013201274XNIMAS.zip). See the Identifier section of this document for more information.

Metadata and the NIMAS File Set

1. PDF REQUIREMENT

Each NIMAS file set must include a **PDF** that includes the **complete title, ISBN(s), and copyright** information for the print book, wherever this information appears on the print book. Usually this information can be found on the title page and verso of the title page. However, in some cases it may be found only on the front and back covers.

2. XML REQUIREMENT

In addition, the specification requires that key bibliographic information be transcribed into the XML file of the file set, regardless of whether this information appears on the cover or title page of the book, or appears as “images” in the print book.

The following information is from the Creating NIMAS page of the web site of the NIMAS Technical Assistance Center:

<http://aim.cast.org/learn/practice/production/creatingnimas#fileset>

“Essential information about a print work should be included in its XML content file as well as in its OPF file to ensure that such information is available whether a fileset's OPF is utilized practically or not; such information typically includes a work's title, author(s), publisher, copyright, and ISBN, and may include other similar items.”

3. OPF REQUIREMENT

The NIMAS specification requires that specific metadata be provided in an OPF, which is zipped up in the NIMAS zip file.

4. EXCEL SHEET REQUIREMENT

Publishers who submit files directly to OverDrive for batch loading must also submit the metadata using the **OverDrive Excel spreadsheet template**. This enables OverDrive to batch load the metadata into the system.

The template for the OverDrive metadata spreadsheet is found on the Support tab of the publisher portal. **Please use only the Excel**

template supplied by OverDrive as it includes the pick lists for all controlled vocabulary fields. Other spreadsheets will not be accepted. Do not add or delete any columns from the template.

Once records have been loaded into the system, if replacement files are sent for batch processing, an Excel sheet should **not** be submitted. Any needed metadata changes to the portal data are made directly in the portal. Please contact NIMAC at 877-526-4622 if you have any questions.

The system will block the upload of a file that has the same Identifier or ISBN as a certified file. **Please notify NIMAC in advance if there is a reason you will be replacing a file set that has already received a digital certificate.**

5. EXCEL TO OPF FEATURE IN THE NIMAC PUBLISHER PORTAL

The NIMAC system now makes it possible for publishers/vendors to enter the metadata once into the batch delivery Excel sheet (found on the Support tab in the publisher portal) and use that sheet to generate "starter OPFs" that contain correctly tagged, correctly formatted metadata.

We strongly encourage all vendors and publishers to save time and avoid data entry errors by entering your metadata only once into the batch delivery Excel sheet and using the automated system feature to generate your OPF metadata.

Complete instructions for how to use this feature are found in the PowerPoint presentation, "**NIMAC 2.0 Publisher Portal: Managing Inventory,**" found on the Support tab of the publisher portal.

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NIMAC Metadata Fields List

Required Fields

Content Type
Copyright Date
Creator
Edition – Numeric (AND nimas-SourceEdition)
Format
Grade Level
Identifier
Language
NIMAS File Creation Date
Publisher
Publisher Notes (required in specific cases)
Publisher Place
Rights
Series, if applicable
Source ISBN
State Edition
Subject
Text Publication Date (AND nimas-SourceDate)
Title

Optional Fields

Errata
Publisher Catalog Number
Reading Program
Short Description
Source Book Pagination
State Edition Differences Note

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NIMAC Metadata Guidelines

1. Content Type

Purpose: This field assigns one of four categories of material type to the file.

Required or Optional? REQUIRED

OPF element/tags:

```
<meta name="DCTERMS.description.note" content=""/>
```

Excel field in OverDrive spreadsheet: Content Type

Excel formatting note: Choose from pick list.

Guidelines:

- Choose the option that **best describes** the content of the book:
 1. **textbook** – Used for student books that provide instructional content in a given subject area, even if the material is not published in a traditional textbook format (e.g., modular textbooks). Hybrid books known as worktexts that include the textbook and workbook in a single consumable volume should be considered “textbook” as they substitute for a textbook in the classroom.
 2. **consumable** – Used for workbooks, lab manuals, and practice books that accompany a core textbook. These are ancillary books handed to the student as a whole book, used by one student and then discarded.
 3. **supplementary reading material** – Used for individually titled “stories” published to support a reading curriculum. NOTE: **Do not** use this designation for subject area materials published by a “supplemental” publisher. Subject area instructional materials should be considered “textbook.”

4. **other** – Used for materials that do not fit into another category, such as student pages from teaching ancillaries and other non-core student materials. Student materials that are not bound books, but are copied pages or other pages distributed as loose sheets are included in this category. Also included are: flash cards, test preparation worksheets, flipcharts and assessment materials. ***This is the category that should always be used for files that contain only the student pages from "mixed" ancillaries used in teaching.***

Examples:

Title shows: Mathematics, Level 3, Practice Book

```
<meta name="DCTERMS.description.note"
content="consumable"/>
```

Title shows: World Geography

```
<meta name="DCTERMS.description.note"
content="textbook"/>
```

Title shows: Katie's Summer Adventure

```
<meta name="DCTERMS.description.note"
content="supplementary reading"/>
```

Title shows: Science: Trees and Wood

```
<meta name="DCTERMS.description.note"
content="textbook"/>
```

Title shows: Assessment Guide, Theme Progress Tests and Test Practice [Grade 2]

```
<meta name="DCTERMS.description.note"
content="other"/>
```

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2. Copyright Date

Purpose: This reflects the most recent copyright date found on the print book.

Required or Optional? REQUIRED

OPF element/tags:

```
<meta name="DCTERMS.date.dateCopyrighted" content=""/>
```

Excel field in OverDrive spreadsheet: Copyright Year

Excel formatting note: Enter 4-digit year.

Guidelines:

- a. Use four digit year for copyright year.
- b. Do not include a "c" before the year.
- c. Data must be included in this field even if it is the same as the Text Publication Year.
- d. If the book contains copyright statements for earlier editions of the book, include only the date for the current (most recent) edition.
- e. If the print book does not include a copyright date, confirm with the publisher the correct date. Contact the NIMAC if you have questions.

Examples:

```
<meta name="DCTERMS.date.dateCopyrighted" content="2008"/>
```

```
<meta name="DCTERMS.date.dateCopyrighted" content="2012"/>
```

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3. Creator

Purpose: This element reflects the persons responsible for the intellectual content of the print book.

Required or Optional? REQUIRED

OPF element/tags:

```
<dc:Creator role="author"></dc:Creator>
```

```
<dc:Creator role="editor"></dc:Creator>
```

```
<dc:Creator role="illustrator"></dc:Creator>
```

Excel field in OverDrive spreadsheet: Author(s)

Editor(s)

Illustrator(s)

Excel formatting note: Separate multiple entries in the same column using the | character, with no spaces between entries.

Guidelines:

- a. Please format names "first name last name" in the OPF and Excel spreadsheets (e.g., John Smith). For corporate authors, enter the name in direct order without articles (e.g., University of Chicago Mathematics Project).
- b. Do not include honorary titles and credentials such as "Dr." or "Ph.D."
- c. In the OPF, repeat each element as many times as needed. Do not include more than one Creator in the same OPF element.
- d. In the Excel spreadsheet, enter names in the appropriate Creator column. Separate more than one name by using the pipe | character. Do not add spaces before or after the | character.

e. Use this field only for persons or corporate bodies responsible for the intellectual content of the book. Do not use this field to repeat publisher information.

g. There is no upper limit to the number of creators which may be included in the OPF or spreadsheet. However, in cases where more than three authors are listed on the print book, NIMAC only requires the first 3 authors in the OPF, Excel sheet and portal data.

Examples:

1. Title page says: Written by Paul Smith and Amy Jordan. Illustrated by Alex Andrews.

OPF:

```
<dc:Creator role="author">Paul Smith</dc:Creator>
```

```
<dc:Creator role="author">Amy Jordan</dc:Creator>
```

```
<dc:Creator role="illustrator">Alex  
Andrews</dc:Creator>
```

Excel sheet:

Paul Smith|Amy Jordan (in Author column)

Alex Andrews (in Illustrator column)

2. Book says: By Ray and Amanda Adams. Edited by Jane Hill.

OPF:

```
<dc:Creator role="author">Ray Adams</dc:Creator>
```

```
<dc:Creator role="author">Amanda Adams</dc:Creator>
```

```
<dc:Creator role="editor">Jane Hill</dc:Creator>
```

Excel sheet:

Ray Adams|Amanda Adams (in Author column)

Jane Hill (in Editor column)

3. Book says: Authors, Dr. Edgar Chavez, Dr. Ellen Shapiro, Alan Stevens, Claude Marshall, Ann Jackson, Carl Maxwell, Adam Smith, Betsy Burton, John Jones, Dr. Rachel Turner, Dr. Megan Harshaw, Theresa Bishop, Michael Edwards, Jill Appleton, Ben Anderson.

OPF:

```
<dc:Creator role="author">Edgar Chavez</dc:Creator>
```

```
<dc:Creator role="author">Ellen Shapiro</dc:Creator>
```

```
<dc:Creator role="author">Alan Stevens</dc:Creator>
```

Excel sheet:

Edgar Chavez|Ellen Shapiro|Alan Stevens

(in Author column)

4. Book says: Developed by the University of Chicago Mathematics Project.

OPF:

```
<dc:Creator role="author">University of Chicago  
Mathematics Project</dc:Creator>
```

Excel sheet:

University of Chicago Mathematics Project

(in Author column)

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4. Edition – Numeric

Purpose: This element reflects the numerical edition of a revised version of a textbook.

Required or Optional? REQUIRED, IF APPLICABLE

OPF element/tags:

```
<meta name="DCTERMS.description.version" content=""/>
```

```
<meta name="nimas-SourceEdition" content=""/>
```

Excel field in OverDrive spreadsheet: Edition - Numeric

Excel formatting note: Choose from pick list.

Guidelines:

- This field is required to contain data only if applicable to describe a numerical revision to a text.
- Please use this format in the OPF: 2nd ed., 3rd ed., 4th ed., etc.
- Due to a quirk in the NIMAS specification that requires the element "nimas-SourceEdition," the data should appear in both of these elements in the OPF:

```
nimas-SourceEdition
DCTERMS.description.version
```

- However, the publisher portal extracts data from the DCTERMS element and disregards nimas-SourceEdition. (We hope eventually to have the latter element removed from the specification.)
- For data consistency, the Excel spreadsheet has a pick list.
- Because of its special connotation in the publishing industry, please include "1st ed." in the metadata only when this designation appears on the print book. Leave the field/element empty if the print book contains no numerical edition statement.**
- If the book has an edition statement that is **not** a numerical or state edition statement, or contains additional information that

expands upon the numerical edition statement, please enter this information in the **Publisher Note** field.

- h. State edition information must be included in the State Edition field.

Examples:

1. Title page shows: American History, Third edition

OPF:

```
<meta name="DCTERMS.description.version" content="3rd ed."/>
```

```
<meta name="nimas-SourceEdition" content="3rd ed."/>
```

Excel sheet:

Edition – Numerical	3rd ed.
---------------------	---------

2. Title page shows: Geography, 4th edition, Fully Revised and Expanded

OPF:

```
<meta name="DCTERMS.description.version" content="4th ed."/>
```

```
<meta name="nimas-SourceEdition" content="4th ed."/>
```

```
<meta name="DCTERMS.description.note" content="Fully Revised and Expanded."/>
```

Excel sheet:

Edition – Numerical	4th ed.
Publisher Notes	Fully Revised and Expanded.

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5. Errata

Purpose: This element provides information about errors in the print book that have been identified but not corrected.

Required or Optional? OPTIONAL

OPF element/tags:

```
<meta name="DCTERMS.description.note" content=""/>
```

Excel field in OverDrive spreadsheet: Errata

Excel formatting note: Free text field.

Guidelines:

- a. Errors in the print book that are identified at the point of creating the NIMAS file should be included in the OPF and portal metadata.
- b. **Please contact the NIMAC for additional guidance if an error appears in the print book in a required NIMAC metadata element, such as title or ISBN.**

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6. Format

Purpose: This element reflects the version of the NIMAS format of the file. The only acceptable file format at this time is NIMAS 1.1.

Required or Optional? REQUIRED

OPF element/tags:

```
<dc:Format>NIMAS 1.1</dc:Format>
```

Excel field in OverDrive spreadsheet: Format

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7. Grade Level

Purpose: This element reflects the grade level or grade range for the instructional material.

Required or Optional? REQUIRED

OPF element/tags:

```
<meta name="DCTERMS.audience.educationLevel"
content="" />
```

Excel field in OverDrive spreadsheet: Grade Level (six columns)

Excel formatting note: Choose from pick list. Up to six terms may be chosen.

Guidelines:

- a. **[This field uses a controlled vocabulary which can be found at the end of this document.](#)**
- b. Grade level information is required whether or not it appears on the print book.
- c. This field is repeating and up to six terms may be selected in the Excel sheet.
- d. Use a separate OPF element for each term.
- e. *Although some materials submitted to the NIMAC may also be used in higher education, all materials accepted into the NIMAC are used in K-12 education. As such, please select the grades that are applicable for the K-12 use of the material.*
- f. "Not Specified" should only be used for material for which no grade or grade range is applicable, such as reference materials. Please do not use this term as a substitute for providing the required information.

Examples:

1. Book is a kindergarten reader:

OPF:

```
<meta name="DCTERMS.audience.educationLevel"
content="Kindergarten"/>
```

Excel sheet: Kindergarten (in Grade Level 1 column)

2. Book is a middle school science text:

OPF:

```
<meta name="DCTERMS.audience.educationLevel" content="Grade 6"/>
<meta name="DCTERMS.audience.educationLevel" content="Grade 7"/>
<meta name="DCTERMS.audience.educationLevel" content="Grade 8"/>
```

Excel sheet: Grade 6 (in Grade Level 1 column)
 Grade 7 (in Grade Level 2 column)
 Grade 8 (in Grade Level 3 column)

3. Book is a fourth grade math textbook:

OPF:

```
<meta name="DCTERMS.audience.educationLevel" content="Grade 4"/>
```

Excel sheet: Grade 4 (Grade Level 1 column)

4. Book is sold for use in upper high school grades and as an undergraduate college textbook.

OPF:

```
<meta name="DCTERMS.audience.educationLevel" content="Grade 11"/>
<meta name="DCTERMS.audience.educationLevel" content="Grade 12"/>
```

Excel sheet: Grade 11 (in Grade Level 1 column)
 Grade 12 (in Grade Level 2 column)

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8. Identifier

Purpose: This number is the unique identifying number for the NIMAS file. This identifier is included in the metadata and is also the naming protocol for the NIMAS zip file.

Required or Optional? REQUIRED

OPF element/tags:

```
<dc:Identifier id="my_id_element"
scheme="NIMAS"></dc:Identifier>
```

Excel field in OverDrive spreadsheet: Identifier

Guidelines:

- a. This field contains the ISBN for the item followed by the characters "NIMAS."
- b. Do not use any spaces or punctuation in formatting the Identifier.
- c. **This field does not repeat.** If more than one ISBN is valid for the book, choose an ISBN that appears on the print book for the Identifier. If both a 13-digit and 10-digit ISBN appear on the print book, please use the 13-digit ISBN for the Identifier as this has been the official industry standard since 2007.
- d. **The NIMAS Identifier must be used as the file name for all NIMAS zip files.**

Examples:

```
<dc:Identifier id="my_id_element"
scheme="NIMAS">9871235346543NIMAS</dc:Identifier>
```

```
<dc:Identifier id="my_id_element"
scheme="NIMAS">0213254368NIMAS </dc:Identifier>
```

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9. Language

Purpose: This element reflects the language of the material.

Required or Optional? REQUIRED

OPF element/tags:

```
<dc:Language></dc:Language>
```

Excel field(s) in OverDrive spreadsheet: Language, Language2

Excel formatting note: Choose from pick list. Up to two terms may be chosen.

Guidelines:

a. Use the **two-letter** language codes as defined in ISO 639-1. The complete code list can be found at:

http://www.loc.gov/standards/iso639-2/php/code_list.php

b. Up to two terms may be included.

c. Please use a separate OPF element for each language.

Examples:

1. Allez, viens! Beginning French, Level 1

```
<dc:Language>fr</dc:Language>
<dc:Language>en</dc:Language>
```

2. Introduction to World Geography

```
<dc:Language>en</dc:Language>
```

3. Matemáticas, Curso 1

```
<dc:Language>es</dc:Language>
```

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10. NIMAS File Creation Date

Purpose: This element reflects the date that the NIMAS file set was completed.

Required or Optional? REQUIRED

OPF element/tags:

```
<dc:Date event="DCTERMS.created"></dc:Date>
```

Excel field in OverDrive spreadsheet: NIMAS File Creation Date

Excel formatting note: Use format YYYY-MM-DD only.

Guidelines:

- a. Enter the date that the NIMAS file conversion was completed in format YYYY-MM-DD.
- b. It is not necessary to update the NIMAS File Creation Date if corrections or changes are made to the NIMAS file set before certification.
- c. **If a file set is submitted to replace a file set that has already been certified, the NIMAS File Creation Date must be updated to reflect the new file set.** (In these cases, the NIMAC also requires a Publisher Note be included in the OPF explaining the reason for resubmission. See the Publisher Note section of this document for more information.)

Examples:

```
<dc:Date event="DCTERMS.created">2011-03-23</dc:Date>
```

```
<dc:Date event="DCTERMS.created">2010-11-01</dc:Date>
```

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11. NIMAS File Size

- System generated upon upload of the NIMAS file set.
- It is **not** necessary to include these data in the OPF or the Excel spreadsheet.

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12. Publisher

Purpose: This element contains the name of the publisher imprint of the print book.

Required or Optional? REQUIRED

OPF element/tags:

```
<dc:Publisher></dc:Publisher>
```

Excel field in OverDrive spreadsheet: Publisher

Guidelines:

- a. In general, the publisher name should be established as it appears on the title page of the print book.
- b. The publisher search in the NIMAC system is by pick list. For this reason, we ask that one format be chosen for a given imprint and used consistently.
- c. This is not a repeating field. If two publishers are listed on the book, please list both in a single field.
- d. Only imprints associated with a given publisher account can be selected in the system. Please contact the NIMAC if you need to add a new imprint to a publisher's account or have questions about how to best format a new imprint.

Examples:

```
<dc:Publisher>Pearson Education</dc:Publisher>
```

```
<dc:Publisher>Davis Publications, Inc.</dc:Publisher>
```

```
<dc:Publisher>Macmillan/McGraw-Hill</dc:Publisher>
```

```
<dc:Publisher>Delta Education</dc:Publisher>
```

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13. Publisher Catalog Number

Purpose: If the book has a publisher catalog number, this information can be included in this element.

Required or Optional? OPTIONAL

OPF element/tags:

```
<meta name="DCTERMS.description.note" content=""/>
```

Excel field in OverDrive spreadsheet: Publisher Catalog Number

Guidelines:

- a. This is a free-text element which publishers may use to include a catalog number for the item.
- b. Please do not use this field to duplicate information already included elsewhere in the metadata, such as the ISBN or title.

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14. Publisher Notes

Purpose: This is a field used to include important information about the book not already included in other metadata elements.

Required or Optional? REQUIRED IN SOME CASES

OPF element/tags:

```
<meta name="DCTERMS.description.note" content=""/>
```

Excel field in OverDrive spreadsheet: Publisher Notes

Excel formatting note: Free text field.

REQUIRED:

- a. If a new file set is submitted to replace a file set that has already received a digital certificate, this field must be used to describe how the new file set differs from the original file set.
- b. If a file set of student pages from a teacher ancillary is submitted, a partial file set note is required.

Optional:

- c. This field can be used to include any important information not included in other metadata fields, such as edition or printing information that is not already covered in the state or numerical edition elements.

Examples:

```
<meta name="DCTERMS.description.note" content="File resubmitted with XML corrections."/>
```

```
<meta name="DCTERMS.description.note" content="This file is INCOMPLETE. It contains only the content distributed directly to students."/>
```

```
<meta name="DCTERMS.description.note" content="B Printing. "/>
```

```
<meta name="DCTERMS.description.note" content="Cedar  
River District Schools Custom Edition. "/>
```

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15. Publisher Place

Purpose: This element contains the geographic location of the publisher of the print book.

Required or Optional? REQUIRED

OPF element/tags:

```
<meta name="DCTERMS.publisher.place" content=""/>
```

Excel field in OverDrive spreadsheet: Publisher Place

Excel formatting note: Include the city and two-letter state postal code.

Guidelines:

- a. Include only the city and state of the publisher; do not include a street address.
- b. Please abbreviate the state using the two-letter U.S. postal code (e.g., Glenview, IL).
- c. If the city is internationally recognized, it is not necessary to include the state (e.g., Boston).

Examples:

```
<meta name="DCTERMS.publisher.place" content="New York"/>
```

```
<meta name="DCTERMS.publisher.place" content="Glenview, IL"/>
```

```
<meta name="DCTERMS.publisher.place" content="Newbury Park, CA"/>
```

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16. Reading Program

Purpose: This element is used for information about “Accelerated Readers” and similar books that are not published as a part of a specific K-12 reading curriculum, but which can be used to supplement a reading curriculum.

Required or Optional? OPTIONAL

OPF element/tags:

```
<meta name="DCTERMS.description.note" content=""/>
```

Excel field in OverDrive spreadsheet: Reading Program

Guidelines:

- a. Please include the complete information as found on the text or another source.
- b. This field is to be used **only** for readers used for language arts/reading instruction.
- c. Please do not use this field for series information for K-12 reading curriculum materials—use the Series field.

Example:

```
<meta name="DCTERMS.description.note"
content="Accelerated Reader: interest level 5.0,
reading level 4.0 ; 75 points"/>
```

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17. Rights

Purpose: This element provides information on the legal restrictions regarding the use of the NIMAS file set.

Required or Optional? REQUIRED

OPF element/tags:

```
<dc:Rights></dc:Rights>
```

Excel: No field used for default statement. Default statement is system supplied for batch uploads. To include a supplementary rights statement, use: Supplementary (Optional) Rights Statement

Guidelines:

a. The standard rights statement required for all NIMAS files is:

The only legal and authorized use of these files is for the production of alternate media materials for blind, visually impaired, or print disabled students as specified in the NIMAC limitation of use agreement. The copyright for these files is the sole property of the original owner.

b. **The above statement must be included in the OPF for all files accepted into the NIMAC.**

c. Publishers are welcome to include an additional rights statement if they choose. Any supplementary statement should be entered directly after the default statement in the OPF, within the same element tags. In the Excel sheet, enter the supplementary statement in the field: Supplementary (Optional) Rights Statement.

d. The system automatically supplies the default rights statement in the portal record for batch loaded files. **Please do not include the default rights statement in the Excel sheet as this will generate a duplicate statement in the record.**

Example for OPF:

```
<dc:Rights>The only legal and authorized use of these
files is for the production of alternate media
materials for blind, visually impaired, or print
disabled students as specified in the NIMAC limitation
of use agreement. The copyright for these files is the
sole property of the original owner.</dc:Rights>
```

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18. Series

Purpose: This element is used to supply an additional, collective title for texts that belong to a publisher series. Up to two series may be included.

Required or Optional? REQUIRED, IF APPLICABLE

OPF element/tags:

```
<meta name="DCTERMS.relation.isPartOf" content="" />
```

Excel field in OverDrive spreadsheet: Series1, Series2

Guidelines:

- a. This field is **required, if applicable**.
- b. Please include the complete series information as it appears on the print book.
- c. Series information does not have to appear on the print book; however, NIMAC will ask vendors/publishers to verify metadata not found on the PDF included in the file set.
- d. Only repeat the book title in this field in cases in which the book is the core textbook of the series and has no other stand-alone title. Contact the NIMAC if you have questions about how to best format the title or series metadata.

Examples:

```
<meta name="DCTERMS.relation.isPartOf"
content="Houghton Mifflin Leveled Readers"/>
```

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19. Short Description

Purpose: This element can be used to provide a brief description of the contents and scope of the textbook.

Required or Optional? OPTIONAL

OPF element/tags:

```
<meta name="DCTERMS.description.note" content=""/>
```

Excel field in OverDrive spreadsheet: Short Description

Guidelines:

- a. This is a free-text field that publishers can use to include 1-2 sentences describing or summarizing the book.
- b. Please **do not** use this field to repeat basic bibliographic information included elsewhere in the record, such as title, grade level, etc.

Example:

```
<meta name="DCTERMS.description.note" content="This introductory text explains the basic concepts of molecular biology and reinforces learning through lab work and group problem-solving activities."/>
```

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20. Source Book Pagination

Purpose: This element provides the pagination information for the print book.

Required or Optional? OPTIONAL

OPF element/tags:

```
<meta name="DCTERMS.format.extent" content=""/>
```

Excel field in OverDrive spreadsheet: Source Book Pagination

Guidelines:

- a. This element is optional; however, the data must be correctly formatted to be accepted.
- b. **Enter the last page number for each numbered section of the physical book, separated by commas, and followed by "p." The pagination should accurately reflect the numbering found in the print book. Please do not add the numbered sections together and/or provide the total number of physical pages.**
- c. Remember to include this metadata in the Excel sheet for batch loads or it will not appear in the system.

Examples:

```
<meta name="DCTERMS.format.extent" content="xvi, 1024 p."/>
```

```
<meta name="DCTERMS.format.extent" content="xi, K21, 356, R12 p."/>
```

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21. Source ISBN(s)

Purpose: This element contains the ISBN(s) of the print book.

Required or Optional? REQUIRED

OPF element/tags:

```
<dc:Source></dc:Source>
```

Excel field in OverDrive spreadsheet: Source ISBN(s)

Guidelines:

- a. **Do** include the 13-digit ISBN. The publishing industry moved to the 13-digit ISBN in January of 2007. **All NIMAS file sets should include a 13-digit ISBN in the metadata even if this number does not appear on the print book.**
- b. **Do** include all ISBNs that appear on the print book that refer to the identical content (e.g., hardcover, paperback, 10-digit, 13-digit)
- c. **Do** include ISBNs not shown on the print book but which refer to the identical contents (e.g., a different binding)
- d. **Do not** include set ISBNs (i.e., ISBNs that refer to multiple volumes that are not a part of the NIMAS file set.)
- e. **Do not** include ISBNs for teacher editions
- f. **Do not** include ISBNs for any other editions that do not contain the identical contents of the NIMAS file set
- g. Repeat the element as many times as needed in the OPF.
- h. In the Excel spreadsheet, separate multiple numbers by the pipe | character.

Example:

```
<dc:Source>9780618224561</dc:Source>
<dc:Source>0618224563</dc:Source>
```

Excel data format for a book with 2 ISBNs:
9780618224561|0618224563

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22. State Edition/National Edition

Purpose: This element reflects whether the book is a state edition or national edition. This metadata is required for **all** files.

Required or Optional? REQUIRED

OPF element/tags:

```
<meta name="DCTERMS.description.version" content=""/>
```

Excel field in OverDrive spreadsheet: State Edition

Excel formatting note: Choose from pick list.

Guidelines:

- a. If the book is not a state edition, please enter "National ed."
- b. Use the U.S. postal code for the state in the OPF element. A list of state postal abbreviations can be found here: <http://www.stateabbreviations.us/>
- c. Do not assume that all books adopted/purchased by a particular state are state editions. Many states adopt national editions of textbooks. ***If there is no designation of state edition on the print book, the book is most likely a National edition.*** Please contact the publisher if you are unsure.
- d. Optional: Publishers may use the State Edition Differences field to supply information about how editions vary from the national edition. (See next section.)

Examples:

```
<meta name="DCTERMS.description.version"
content="National ed."/>
```

```
<meta name="DCTERMS.description.version" content="TN
ed."/>
```

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23. State Edition Differences Note

Purpose: This element is used only for file sets that are state editions. It includes information on how the state edition differs from the national edition.

Required or Optional? OPTIONAL

OPF element/tags:

```
<meta name="DCTERMS.description.note" content=""/>
```

Excel field in OverDrive spreadsheet: State Edition Differences Note

Guidelines:

- a. Use this element to describe how extensively a state edition is customized for the state, e.g. tip-in section in front; variations throughout entire text, etc.
- b. Note: Although optional, this metadata is very valuable to braille transcribers who are producing a state edition braille book.

Examples:

```
<meta name="DCTERMS.description.note"
content="California customizations throughout text.
Not compatible with any other edition."/>
```

```
<meta name="DCTERMS.description.note"
content="Includes Alabama standards tip-in section;
core content identical to national edition."/>
```

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24. Subject

Purpose: This element reflects the subject content of the text using a controlled vocabulary. [See list appended to this document.](#)

Required or Optional? REQUIRED

OPF element/tags:

```
<dc:Subject></dc:Subject>
```

Excel field(s) in OverDrive spreadsheet: Subject1, Subject2, Subject3

Excel formatting note: Choose from pick list.

Guidelines:

- a. **Use only the controlled vocabulary list provided by the NIMAC.**
- b. One term is required; however, up to three terms may be chosen. Use the pick list in the Excel spreadsheet.
- c. Please choose the most specific, appropriate term. For example, if a book is entitled "Introduction to Biology," choose "Biology" rather than "Sciences" as the subject.
- d. For items that have a Content Type of "Supplementary Reading Materials," please include "Reading" as the first subject. Optionally, an additional subject, (e.g., "Biography") may be chosen.

Examples:

```
<dc:Subject>Reading</dc:Subject>
```

```
<dc:Subject>Geometry</dc:Subject>
```

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25. Text Publication Year

Purpose: This date reflects the year that the print book was first published/sold on the market.

Required or Optional? REQUIRED

OPF element/tags:

```
<meta name="DCTERMS.date.issued" content=""/>
<meta name="nimas-SourceDate" content=""/>
```

Excel field in OverDrive spreadsheet: Text Publication Year

Guidelines:

- a. **This date refers to the date the edition was first sold, regardless of its copyright date.** Many titles are published a year or more before the copyright date. Please be sure the publisher provides the correct publication date.
- b. Use four-digit year for this.
- c. Due to a quirk in the NIMAS specification, "nimas-SourceDate" is required to be present in the OPF. So the data should appear in the OPF in both of the these elements:

```
<meta name="DCTERMS.date.issued" content="2010"/>
<meta name="nimas-SourceDate" content="2010"/>
```

- d. If you extract OPF metadata for a portal upload, the system will extract from the DCTERMS element and disregard nimas-SourceDate. (We hope eventually to have the latter element removed from the specification.)

Example:

```
<meta name="DCTERMS.date.issued" content="2011"/>
<meta name="nimas-SourceDate" content="2011"/>
```

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26. Title

Purpose: This element reflects the complete title as it appears on the title page of the print book.

Required or Optional? REQUIRED

OPF element/tags:

```
<dc:Title></dc:Title>
```

Excel field in OverDrive spreadsheet: Title

Guidelines:

a. Completeness: Provide the complete title as it appears on the title page. If the complete title only appears on the book cover, use the cover title. Separate a subtitle from the main title with a colon. Separate ancillary or grade level information with a comma.

Examples:

```
<dc:Title>Art Through the Ages: An Introduction
</dc:Title>
```

```
<dc:Title>Mathematics, Grade 5, Workbook</dc:Title>
```

b. Capitalization: follows standard title capitalization rules. Foreign language books may follow capitalization rules for the language or English rules, but please apply whatever rules you use consistently.

Examples:

```
<dc:Title>Is Your Mama a Llama?</dc:Title>
```

```
<dc:Title>Paco y su gato</dc:Title>
```

c. Ancillaries: Ancillary titles should appear **after** the main title and any grade information, regardless of how the title page is

formatted. If the ancillary title does not appear on the print book, but this information is essential for distinguishing between otherwise identical titles, add the ancillary title in brackets.

Example #1:

Title page shows "Blackline Masters, English Grammar, Grade 4"

```
<dc:Title>English Grammar, Grade 4, Blackline  
Masters</dc:Title>
```

Example #2:

Title page shows "Mathematics Grade 2" but book is the workbook to accompany the core textbook

```
<dc:Title>Mathematics, Grade 2 [Workbook]</dc:Title>
```

d. Series: A series is a collective title that corresponds to a group of books **in addition to** the unique title for each book. Please use the Series field for series information. Ordinarily, you should not repeat the title in the series field or the series in the title field. Please contact the NIMAC if you are unsure how to enter a given title/series into the metadata.

Example:

```
<dc:Title>Adventures</dc:Title>
```

```
<meta name="DCTERMS.relation.isPartOf"  
content="Houghton Mifflin Reading"/>
```

e. State: Do not include the name of a state in the title unless this appears as an integral part of the title.

Example #1:

Title page shows: "World Geography" and a symbol for the state of West Virginia in the upper right hand corner.

```
<dc:Title>World Geography</dc:Title>
```

```
<meta name="DCTERMS.description.version" content="WV  
ed."/>
```

Example #2:

Title page shows: California Social Sciences, Grade 5

```
<dc:Title>California Social Sciences, Grade
5</dc:Title>
```

```
<meta name="DCTERMS.description.version" content="CA
ed."/>
```

f. Numerical Edition: Do not include this information in the title. Use the Edition–Numeric field for this information. Only include numerical edition information if it appears in an ancillary title after “to accompany” or a similar phrase identifying book(s) that the ancillary may be used with.

See examples below.

Example #1:

Title page shows: Human Anatomy, 3rd edition

```
<dc:Title>Human Anatomy</dc:Title>
```

```
<meta name="DCTERMS.description.version" content="3rd
ed."/>
```

Example #2:

Title page shows: Human Anatomy, 3rd edition, Study Guide

```
<dc:Title>Human Anatomy, Study Guide</dc:Title>
```

```
<meta name="DCTERMS.description.version" content="3rd
ed."/>
```

Example #3:

Title page shows: Study Guide to Accompany Statistics for Business, Fifth Edition

```
<dc:Title>Study Guide to Accompany Statistics for
Business, Fifth Edition </dc:Title>
```

```
<meta name="DCTERMS.description.version" content="5th ed."/>
```

(Note: The edition statement assumes that the ancillary is also a 5th edition. When in doubt, leave it in.)

g. Publisher: Do not include the publisher name in the title unless it appears prominently on the title page at the head of the title and is a part of the title as marketed by the publisher.

Example:

Title page shows: Scott Foresman Addison-Wesley Mathematics

```
<dc:Title>Scott Foresman Addison-Wesley Mathematics  
[Grade 2]</dc:Title>
```

h. Grade Level: Only include grade information in the title if this information appears on the title page **or** if the title is generic and the grade level is necessary to distinguish between otherwise identical titles. In the latter case, include the grade level in brackets if it does not appear on the print book. Include the grade level after a subtitle but before an ancillary title.

Examples:

Title page shows "Glencoe Health" and grade level metadata shows it is a grade 5 book

```
<dc:Title>Glencoe Health [Grade 5]</dc:Title>
```

Title page shows: Student Math Journal, Mathematics, Grade 7

```
<dc:Title>Mathematics, Grade 7, Student Math Journal  
</dc:Title>
```

Title page shows: Writer's Handbook, Reading for Writers, An Introduction to Literature and Composition, Grade 9

```
<dc:Title>Reading for Writers: An Introduction to  
Literature and Composition, Grade 9, Writer's  
Handbook</dc:Title>
```

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WHERE TO GO FOR ADDITIONAL HELP

- If you have technical problems or questions related to uploading records or submitting batch loads to OverDrive, please contact OverDrive directly at

NIMACSupport@privatereserve.com

- If you need to request an FTP folder from OverDrive, or notify OverDrive of an FTP file delivery, email:

FTPNIMAC@privatereserve.com

- If you have questions about the NIMAS specification, or creating NIMAS file sets, contact the **National Aim Center at CAST:**

Chuck Hitchcock, Director

EMAIL: chitchcock@cast.org

TEL: 781-245-2212 x233

NIMAS exemplars and other information on how to prepare NIMAS are available at the CAST website:

<http://aim.cast.org>

- For any questions about NIMAC policy or metadata requirements, please feel free to call the NIMAC (Monday through Friday, 8 AM – 4:30 PM ET) or email:

502-899-2230 or **1-877-526-4622**

nimac@aph.org

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Addendum A: Controlled Vocabulary Lists

NIMAC Subject Heading List

- Anthropology
- Art
- Athletics
- **[Business Subject Headings]**
 - Accounting
 - Business
 - Economics
- Child Rearing (Use for Parenting)
- **[Computer Science Subject Headings]**
 - Computer Science Education
 - Data Processing
 - Keyboarding (Data Entry)
 - Programming
 - Technology
- **[Consumer Science Subject Headings]**
 - Consumer Science
 - Cooking Instruction
 - Family Life
 - Daily Living Skills
- **[Education Subject Headings]**
 - Education
 - Special Education
- **[Foreign Language Subject Headings]**
 - French
 - German
 - Italian
 - Japanese
 - Latin
 - Russian
 - Spanish
 - World & Classical Language - Other
- **[Health Subject Headings]**
 - Health
 - Medicine
 - Nutrition
 - Physical Fitness
- **[Language Arts / Literature Subject Headings]**

- Communications
- Dictionaries
- Language Arts (Use for writing, spelling, vocabulary, phonics, and phonemic awareness textbooks)
- Literature (Use for textbooks and other ancillary materials only)
- Reading (Use for reading comprehension, fluency, readers, reading programs, etc.)
- Laws
- **[Mathematics Subject Headings]**
 - Algebra
 - Calculus
 - Geometry
 - Mathematics
 - Statistics
 - Trigonometry
- Music
- Philosophy
- Political Science
- **[Psychology Subject Headings]**
 - Self-Help Programs
 - Psychology
- Recreation
- Religion
- Religious Education
- **[Sciences Subject Headings]**
 - Agriculture
 - Anatomy
 - Astronomy
 - Biology
 - Chemistry
 - Ecology
 - Physics
 - Sciences
- **[Social Studies Subject Headings]**
 - Civics
 - Geography
 - History
 - Social Studies
- Social Work
- Sociology
- Speech
- Spirituality

- Study Skills
- **[Supplementary Reading Materials Subject Headings] (Not textbooks)**
 - Biographies
 - Poetry
 - Supplementary Reading Materials
Note: Books, magazines, or fugitive materials, aside from basal texts, used to enrich instructional materials or to furnish additional practice in reading. Includes high interest low vocabulary books and recreational reading.
- **[Vocations, Trades, & Guidance Subject Headings]**
 - Career Guidance
 - Careers
 - Guidance
Note: Process of assisting individuals and groups to develop realistic and satisfying goals, plans, and activities. "Counseling" is one aspect of the total process of "Guidance."
 - Vocational Education

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Level of Education/Grade level

- Pre-Kindergarten
- Kindergarten
- Grade 1
- Grade 2
- Grade 3
- Grade 4
- Grade 5
- Grade 6
- Grade 7
- Grade 8
- Grade 9
- Grade 10
- Grade 11
- Grade 12
- Not Specified

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Addendum B: Sample OPF Metadata

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE package
  PUBLIC "-//ISBN 0-9673008-1-9//DTD OEB 1.2 Package//EN"
  "http://openebook.org/dtds/oeb-1.2/oebpkg12.dtd">
<package unique-identifier="my_id_element">
  <metadata>

    <dc-metadata xmlns:dc="http://purl.org/dc/elements/1.1/"
      xmlns:oebpackage="http://openebook.org/namespaces/oeb-package/1.0/"

        <dc:Title>World Geography </dc:Title>
        <dc:Creator role="author">Emma Jones</dc:Creator>
        <dc:Creator role="editor">Jane Tennyson</dc:Creator>
        <dc:Creator role="illustrator">Maurice Kerscher</dc:Creator>
        <dc:Publisher>Rock Run Educational Publishers</dc:Publisher>
        <dc>Date event="DCTERMS.created">2011-05-11</dc>Date>
        <dc:Format>NIMAS 1.1</dc:Format>
        <dc:Identifier id="my_id_element"
      scheme="NIMAS">82295347891NIMAS</dc:Identifier>
        <dc:Language>en</dc:Language>
        <dc:Rights>The only legal and authorized use of these files is
      for the production of alternate media materials for blind, visually
      impaired, or print-disabled students as specified in the NIMAC
      limitation of use agreement. The copyright for these files is the sole
      property of the original owner.</dc:Rights>
        <dc:Source>82295347891</dc:Source>
        <dc:Subject>Geography</dc:Subject>
      </dc-metadata>
    <x-metadata>
      <meta name="DCTERMS.description.version" content="CA ed."/>
      <meta name="DCTERMS.description.version" content="2nd ed."/>
      <meta name="DCTERMS.date.issued" content="2010"/>
      <meta name="DCTERMS.publisher.place" content="Chicago, IL"/>
      <meta name="DCTERMS.date.dateCopyrighted" content="2011"/>
      <meta name="DCTERMS.audience.educationLevel" content="Grade 9"/>
      <meta name="DCTERMS.audience.educationLevel" content="Grade 10"/>
      <meta name="DCTERMS.audience.educationLevel" content="Grade 11"/>
      <meta name="DCTERMS.audience.educationLevel" content="Grade 12"/>
      <meta name="DCTERMS.description.note" content="textbook"/>
      <meta name="DCTERMS.format.extent" content="xxi, 356 p."/>
      <meta name="DCTERMS.relation.isPartOf" content="Rock Run
      Geography Series"/>
      <meta name="nimas-SourceEdition" content="2nd ed."/>
      <meta name="nimas-SourceDate" content="2010"/>
    </x-metadata>
  </metadata>
</package>
```

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