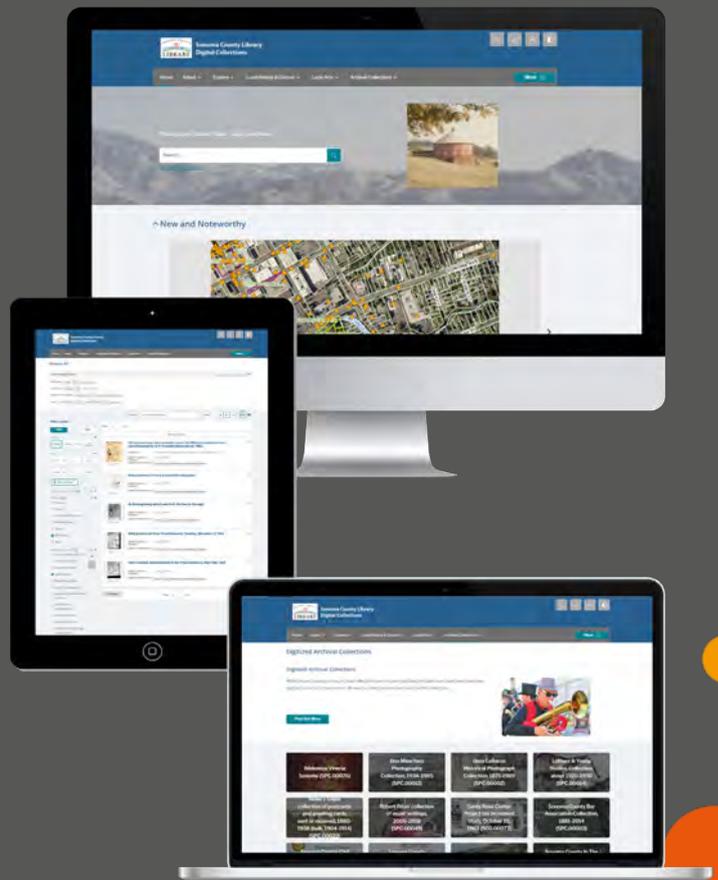# quartex
create digital collections

Unlock your **Archives** | **Exhibit** your content | Promote **Discovery**

How to use metadata-related features in Quartex to create discovery pathways

Digital archives are heavily dependent upon the scope and quality of metadata for their usability and searchability, but how effectively does your current digital asset management platform leverage metadata to create pathways for discovery?

The digital archive of the Sonoma County Library is a great example of the marriage of comprehensive metadata and technical functionality in Quartex to create effective and numerous discovery pathways.
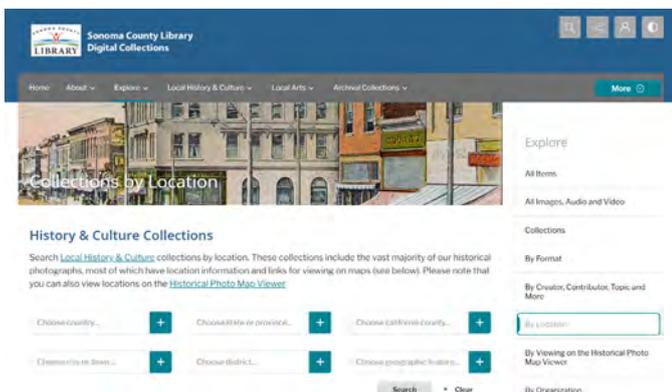
In this guide, Geoffrey Skinner, Cataloging and Metadata Supervising Librarian at Sonoma County Library, shares five metadata-related features in Quartex that have been critical in helping the Library's Digital Collections team achieve ease of navigation and discovery in its digital archive.

AM An Adam Matthew Digital Platform

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Five ways to make your metadata work harder for you

1. Create and apply faceted Controlled Vocabularies to facilitate browsing, filtering and discovery of like material

"When devising a Controlled Vocabulary, I recommend considering a faceted approach for subject headings over a coordinated string. An example of this is our numerous geographic Controlled Vocabulary fields, browsable via our Collections by Location page under the Explore menu."
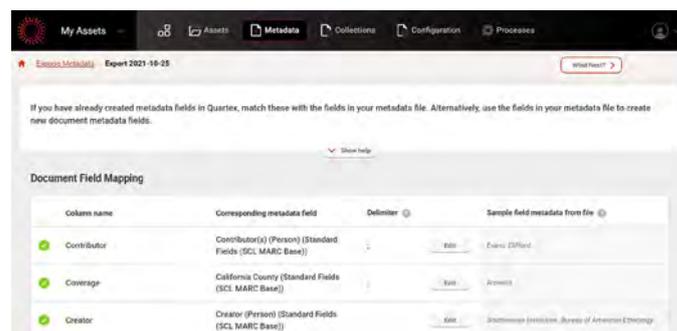

2. Consider whether you want to encourage discovery across your site or within a specific collection

"When deciding whether to create a new field in the Standard Fields field group or an additional field group, think carefully about the purpose of that data - and create collection-specific Controlled Vocabularies when you want to facilitate search within a collection, such as this example from the Sonoma Responds collection."

3. Don't forget about the role standards play in achieving interoperability

"Think about where you want to share your records outside of Quartex and the metadata standards employed in doing so. For example, sharing records via OAI-PMH - possible via the Expose feature in Quartex - requires mapping your fields to simple Dublin Core in a one-to-one relationship."

4. Adhere to a strict definition of "collection" and use Controlled Vocabularies to present other groupings

"Like Controlled Vocabularies, collections provide a means by which to aggregate and present your records. From a broad interpretation of 'collection' as any grouping, our team has since refined this definition to reflect the physical collocation and original context.

"In addition to fields such as Subjects, Places, People and Formats, I recommend creating 'organizational' Controlled Vocabularies that reflect other record groups, such as archival hierarchies or contributing repositories. This facilitates the use of highly visual list landing pages as alternatives to defined collections."

5. Use Related Assets fields to create and link to author bios

"Sonoma's Local Authors collection largely comprises metadata-only records describing the creators of assets featured in the Author and Visual Artist Works collection, from which we've linked using a Related Asset field called 'View Profile.'

"These records serve as authority records or biographical-historical notes, but the same approach could be taken to provide additional context for any Controlled Vocabulary term, from corporate bodies to fonds, subjects or places."

Learn more

Request a free trial of Quartex to explore these metadata-related features in more detail.

Use your own metadata and assets to create discovery pathways in a simple starter site.

As part of your trial, you'll also gain access to the Quartex Community Platform (QCP) which contains a longer version of this guide, as well as a wealth of supporting information and video tutorials to help you configure your metadata in ways that meet the specific needs of your collections, your repository, and your user community.

Request your trial at: quartexcollections.com/demo-quartex