Metadata Workflow for Digital Collections

Sharon Favaro,
Special Projects Coordinator
Catalog Department
Rutgers University Libraries

Working Definitions for project roles:

Collection Project Manager: Primary liaison to the collection owner/curator. Has overall responsibility for the complete accession of the collection into the repository, including:

- Setting the master timetable
- Managing all deadlines
- Working with the metadata manager to analyze the collection
- Working with the metadata manager and the collection owner to address any unique needs of the collection
- Managing the digitization of resources, including assigning and supervising digitization staff
- As needed, train collection owners and their staff and set deadlines for local digitization by collection owners.
- Working with metadata manager to coordinate the digitization of resources with metadata creation
- Working with the programmer and metadata manager for indexing, search and display
- Working with the collection owner to "go live" with the collection and announce its availability.

Metadata Project Manager: Primary responsibility for metadata design and creation, including:

- Working with the project manager to analyze the collection
- Work with the collection owner and collection project manager to address any unique metadata needs.
- Managing metadata timetables and deliverables.
- Reviewing metadata periodically with collection owner/curator to insure that information needs of the primary user group and preservation needs of the owner/curator are addressed.
- Developing templates and controlled vocabularies
- Managing the creation of metadata, including assigning and supervising staff.
- When metadata is created locally, train collection owner staff and set timetables.
- Coordinating with the collection project manager to coordinate metadata creation with digitization of resources.

Metadata Workflow

1. Meet and review the collection.   (MD project manager, Collection
   project manager and, ideally, the collection owner)

   Questions to be answered in this review:

   A. What is the name of the owning institution? Who is the contact
      person?
   B. Is this a named collection? If so, what's the name and/or
      collection code? If not, develop a name with the collection owner
   C. What type of collection is it? Processed or Unprocessed?
      Exhibition, manuscripts, or bulk composition of the collection,
      etc.?
   D. What is the date range of the collection?   Creation Date for the
      intellectual content is an important date of element.
      Each item must have a date, even if it's an approximation.
   E. Is there any information that will assist with cataloging, such as
   F. finding aids or an inventory list?   If so, is there a digital (include
      URL) or physical version?
   G. When was the collection accessioned? Who is the donor?
   H. Is there a deed of gift? Can we digitize this?
   I. Are there any restrictions on the display of the digital
      information? Can we use a standard copyright statement?
   J. What are the digitization specifications (dpi, color space, etc.)
      used to create the collection?

2. Collection owner must complete a collection level record
   before any metadata provision begins (May be necessary to have
   collection owner fill out a print version of collection record).

3. Review the genre list in advance and sort by genre and form that
   are most likely to be used for a particular collection.

4. For the New Jersey Digital Highway, the **time period corresponding
   to the core curriculum standards** for historical time periods in New
   Jersey is critical. NJDH supports a time period browse for resources,
   and it is important that the time period browse supports browsing
   through the entire collection. A resource may span multiple core
   curriculum time periods, in which case multiple time periods are
   supplied.

5. Localization is also critical, so that educators, students and the general
   public can find resources specific to their county. NJDH supports a
   county browse of resources. If multiple counties are represented by
   the resource, each county should be represented in the metadata.
   Resources may pertain to the state as a whole, or to regions outside
   the state, such as the neighboring states, New York and Pennsylvania.

The controlled vocabulary for geographic browse can accommodate this.

6. Are there specific subject terms that can be assigned to all or significant portions of the collection, such as ethnic group?

7. Are there prominent people in the collection who should have authoritative names researched and established in drop down menus?

8. What types of resources (MODS: Physical Description. Type of resource) are included in the collection? Are these documents, oral histories, photographs?

9. Design one or more templates for the collection, based generally on physical format or genre. Templates need to have a nominal title. Currently, to create a template in the Workflow Management System. one must create a record, then create a separate template (one can not create a template, and then start creating records). **All metadata cataloging should utilize one or more templates.** Templates insure that information that pertains to all items in the collection are consistently presented, without spelling errors, for all items. There is always at least one data element that is consistent across a collection, so a template should be used rather than creating each metadata record from scratch.

10. Select and assign staff to perform the metadata cataloging.

11. Set timetables with collection project manager, particularly to coordinate digitization with metadata creation

12. Meet regularly with collection project manager. Establish meeting schedule.

13. Meet as needed with collection owner.   Keep collection owner informed of progress via email.

Last updated: August 22, 2006