

Minutes
Metadata Working Group
March 13, 2006

Present: K. Ananthan, I. Beard, S. Favaro, R. Marker, L. Sun, M.B. Weber

Excused: G. Smulewitz

Guests: S. Ellis, Y. Yu

1. Templates-

The group discussed whether templates should be required for WMS projects. Use of templates is currently a default option. Requiring templates for projects can be enforced locally, but it would not be possible to do so with project partners.

Use of templates can be presented to project partners as a strongly recommended option since it reduces time, ensures uniformity of information, and reduces the possibility of errors. Setting up templates will be incorporated into the training for all new project managers. Templates will be presented to them as an enabling feature of the WMS.

Other suggestions were made regarding templates, such as limiting them to specific projects. A suggestion was made to permit project managers to determine whether they mandate use of templates, and if project participants can set up their own templates. If project managers set up templates, they have the availability to make them available to all project participants. It was noted that this recommendation will be applied to release 2.0, not 1.2.

It was agreed that permitting participants to set up templates prior to creating records was a good idea. In the current version of the WMS, templates must be enabled each time a record is created. It was suggested that 2.0 provide the option "Apply to all metadata sessions."

Final decisions regarding templates:

Templates-- Changes to be made in Release 2.0

Require them? Project manager should have option of making the template a default, or optional for that project

Who creates templates? Project manager decides if users can create, edit templates

Who can use a template? All project templates available to everyone who works on a project

Create from existing metadata record? Allow the user to create a template either from an existing metadata record or from scratch

2. WMS testing- The group discussed experiences and observations from the recent round of testing, and also discussed how to plan for future sessions.

The group agreed that revising some staff position descriptions to include testing as part of their regular responsibilities was a good idea. It is most likely that this will be applied to the job descriptions of the individuals who attended testing for the duration of the test period. This is not to imply that other position descriptions will not be revised at a future date.

R. Marker, I. Beard, and S. Favaro were designated as permanent project managers. They will be the first to log onto the system and do testing before other participants. Participants will work as a group with their project managers, and the project managers will serve as point persons and report problems to K. Ananthan. It was also decided that each group would test one type of resource or issue (bugs, photos, etc.). Additionally, K. Ananthan and Y. Yu will have a pre-test meeting with the project managers prior to testing and will develop a game plan. Testing sessions will end with post-testing wrap up discussions among all participants.

Preparation for the next round of WMS testing was discussed. Testers will be asked to spend more time testing the search interfaces in NJDH and RUcore and to compile a list of what should be displayed in the long and short forms. We need to determine what we want to display, and also how it should be displayed. It was noted that the major search options between the two interfaces should be consistent, and that the Software Architecture group members should not be the ones to make these recommendations. It was suggested that a search interface standards committee be formed to undertake this work, and that their first recommendations should be made before the next release.

3. WMS Issues that Remain to be Resolved:

a. Date qualifier to distinguish individuals with the same name- R. Marker suggested dropping titles from names. A suggestion was made to review the name list, and remove titles since their application is not consistent. This change will be made in version 2.0. L. Sun and R. Marker will verify if the name element on the WMS form is accurate compared to what is currently in the spreadsheet. They will also check dates associated with names and check the MODS element to make sure that the name conforms to the standard.

b. Playback speeds for container types in the WMS- A request was made by S. Ellis to develop a list relevant to the types in the current version of the WMS. The pull-down list that is currently available in the WMS is identical to what is provided in the MARC documentation for the 007 field, byte 3 for sound recording playback speed. It was suggested that we assign specific values to the appropriate material types. For example, cassette tapes have a different playback speed than LPs. There are eight container types currently in the WMS. M.B. Weber will provide a list of playback speeds that it relevant to each.

c. sourceMD

conditionEvaluationEvent- “Rating” and “Characteristics” should not appear as subelements of “Associated Object.” The spreadsheet will be changed so that “rating” and “characteristics” will appear after “detail” for object, not “Associated Object.” This will be fixed in version 2.0. K. Ananthan will correct the metadata spreadsheet.

d. sourceMD

conditionEvaluationEvent

characteristics- Each source type should have one list that addresses all relevant issues and characteristics. I. Beard will provide a controlled vocabulary for video recordings. All changes should be sent to M.B. Weber who will edit the Source CV spreadsheet.

e. sourceMD

conditionEvaluationEvent

type- Lacks controlled vocabulary, and currently has the values “type 1,” “type 2,” etc. M.B. Weber and S. Favaro will look at the controlled vocabulary list and M.B. Weber will update the Source CV spreadsheet.

f. WMS form errors

techMD- Encoding should be omitted from the techMD element <format> for dataset, event, interactive resource, service, and software. It was discussed and agreed that other elements and subelements (compression scheme, orientation, sampling, time code, duration, system, frame, audio) currently in the WMS for these resources will be omitted.

It was pointed out that “Type of Item: Collection” is not listed on the metadata spreadsheet for techMD. K. Ananthan will add this to the spreadsheet and make it consistent with Event.

It was agreed by the group that <constraints><extentType> should be omitted.

g. WMS form errors

rightsMD- The following revisions will be added in the next release of the WMS:

<permission><userType> - Currently lists “option 1,” “option 2,” etc. It was agreed that the appropriate values are individual, group, both, and undefined.

<constraints><type>- - Currently lists “option 1,” “option 2,” etc. It was agreed that the appropriate values are Quality, Format, Unit, Watermark, Payment, Count, Attribution, Time, and TransferPermissions.

h. Next WMS release

SourceMD

R. Marker pointed out that Page acidity is spelled wrong. This will be corrected in release 1.2.

i. SourceMD Spreadsheet

K. Ananthan shared a list of errors from the metadata spreadsheet with the committee.

R. Marker will work with her to further research the inaccuracies and errors, which will be reported back to the committee.

4. Controlled vocabulary list for Videorecordings

R. Marker made a request to add PBCore as a genre type. PBCore includes a long list of video types; the entire list can be made available in the WMS.

5. Training for Staff who create metadata for projects

In the interest of time, M.B. Weber tabled this item for the next meeting.

6. Announcements

K. Ananthan will be tidying up the mss3 server, cleaning out (deleting) the “test” projects, records, users, etc.