Metadata Working Group

May 19, 2014

Present: Kalaivani Ananthan, Isaiah Beard, Daria Gorman, Yu-Hung Lin, Rhonda Marker, Jane Otto, Li Sun, Mary Beth Weber, Krista White (recorder)

Guests: Marty Barnett, Peter Konin

1. Announcements
   a. RUcore release summary (R7.4 and R7.5)- K. Ananthan
      i. R7.4 to be released mid-August , and mostly for Open Access policy implementation
      ii. Testing on the development server will begin in July and will be completed by the last week of the month. Testing will be conducted in another location since the IHLs will be used for the Rutgers Future Scholars program.
      iii. R7.5 is coming in November; more features required for Open Access policy will be implemented in this release.
   b. MD Spreadsheet update- K. Ananthan
      i. Has received feedback on the Source metadata updates. Multiple people asked the same question about some elements, and K. Ananthan will bring the collated questions to MWG to discuss.
      ii. The metadata spreadsheet doesn't match the order of elements as provided on the WMS entry form. K. Ananthan has corrected this, and all 4 sections have been ordered to match the WMS form.
      iii. The updated metadata spreadsheet is on the T: drive at RULIB_Metadata; K. Ananthan has created a folder to match the version of WMS, WMS Version 3.3, for the updated spreadsheet.
2. Initiating digital projects status update- R.Marker and P. Konin.
   This information will be available in Sakai for review.
      i. P. Konin distributed a list of digital projects. A guest login is needed for Intellect so that MDWG members can see project tables/information for review; M. Barnett will create an account and share it with the group.
      ii. General updating
      iii. Items "in planning" lacking a proposal will be dropped from Intellect but may be resubmitted. Cabinet has made it clear that no projects will be worked on unless there is a proposal that has started the process
         1. Anyone proposing a project must first complete the digital projects questionnaire (https://rucore.libraries.rutgers.edu/about/participate.php), which will be done by project manager
         2. Holds have been placed on projects that were in process before Cabinet began to require the form. There has not been a moratorium on new digital projects.

iv. The process – Using Rhonda's Sample Document: Use Major Digitization Projects Questionnaire
   1. Simple rights issues
   2. Fewer than 50 objects = Routine project.
   3. Major projects are reviewed by Acting AUL for Collection Development and Management. A proposed project that has the potential for heavy workload implications will be reviewed for impact on RUL staff resources.
   4. The completed form is submitted to Marker and Pilch.
      a. They want to put a link to the form from the Information for Researchers Page – not done because thought to be RUL internal forms and don't want to make it public.
      b. The entire form uses digital signatures
      c. The question was raised if instructions will be provided for completing the form, examples, or information regarding what happens after it is submitted. R. Marker concurred that the form needs refinement, but did not want to hold up digital projects because the form was not perfected.
      d. This brings standardization and uniformity that were formerly missing to the process.
      e. Completed signed proposal forms will be acknowledged in the metadata. Where this will be is still to be determined
         i. Marker questioned whether this should be recorded as Administrative Documents, since it's a rights document.
         ii. This information could be recorded as a provenance event in Source Metadata.
         iii. It is not appropriate for a Descriptive Event.
         iv. This issue requires further examination and discussion by MWG.
   5. The form needs to be refined to more accurately reflect information for born digital formats.
      a. The form does not necessarily indicate who will handle the metadata, which needs to be resolved. J. Otto noted that it should clearly state the Project Manager and Metadata Manager.
         i. The issue of how Metadata Managers are assigned was discussed. Metadata Managers will have responsibility for creating application profiles and metadata templates for the project.
         ii. Discussed how requests for a Project Manager should be handled; requests should be sent to the MDWG listserv.
      b. The proposed solution is to send proposals to MWG as part of the approval process. Qualified Metadata Managers (MM) will ebe assigned to manage the project metadata.   When a MM is identified, Marker will inform the Project Manager listed on the form.

          c.   The group suggested that Konin should review projects in Intellect and update Metadata Managers for projects that don't list them.

      6.   R. Marker clarified that John Brennan has the title "Digital Projects Coordinator," but is not involved in any current projects. R. Marker reported that he did some scanning for exhibitions and other projects.

3. Adding School, Departments and Centers in the WMS- J. Otto
   a. The objective is to increase search and retrieval capability within the faculty deposit portal to enable browsing by school, department, and university organizations/centers.
      i. We want to use data from LDAP database to create the lists.
      ii. LDAP uses cryptic abbreviations. JJO has been mapping these to user friendly department/school names
      iii. Adding authority attribute for department and school
      iv. This information will impact the collection hierarchy because the information is populated based on the NetID that the depositor provides for the first sign-in screen
         1. The LDAP Hierarchy consists of only 2 levels.
            a. It consists of a person's name and department name.
            b. There is no organizational chart view in LDAP. It isn't possible to determine whether a department is part of a school.
      v. The department and school names are sometimes cryptic; user friendly department and school name with authority heading for departments and schools will be created in <mods:name type=corportate> as part of the cleanup project.
      vi. This will create a clean hierarchy of the collections, including schools.
   b. J. Otto is doing this work on the test server under K. Ananthan's supervision.
   c. The ability to search and retrieve this information will be tested in 7.4.
   d. After testing, metadata cleanup for existing resources in the repository will be done on the production server after it's upgraded to R7.4.
   e. Otto is developing the procedure to catalog new deposits.
   f. f. Once the procedure is working properly, a request will be sent to the Software Architecture Working Group to automate the process.

4. Application profiles
   a. China Boom
      i. Digital File Upload
         1. Had to reformat transcripts. The Asia Society is creating them in all kinds of formats (Excel!) –
            a. Clarify that CB file types are video and transcript files
            b. Correct nomenclature for archival PDF is PDF/a
      ii. Descriptive Metadata :

         l. Sun explained how descriptive metadata was created for the project. titleInfo put Interviewee's name first in order to make the interviews more easily findable
         1. genre authorities: we need to record what we're doing for our own local practices.
            a. AAT was used for these resources since they are primarily visual
            b. LCSH genres are text-heavy

2. Subject headings were taken from the interview transcripts, and broad headings were assigned.
3. Names: being double-indexed under both subject and name
   a. The interviewee's name isn't usually recorded as a subject in RUcore.
   b. A person in the video/interview/ is a name in the interview, and they are also a subject; we should err on the side of double-indexing.
4. Origin Info: Publisher name and place of publication shouldn't be included since these are not considered published. If this is left blank, information about where the information took place is lost.
5. Rights: can we add a sub-element for rightsHolder URL?
   a. DOI references must replace Fedora handles.
   b. Administrative documents are embargoed and aren't display to the public.
   c. The administrative documents collection isn't indexed, and isn't retrievable in RUcore or Google.
   d. L. Sun will work with M. Gallagher to get instructions for creating relationships, administrative metadata, and embargoes.

b. K. Ananthan has guidelines for uploading files. Since the WMS is flexible, there isn't a single method for uploading files.

Article, audio without a transcript, audio with a transcript, document are done. She will work on the rest and email us for review.

5. Proposal to implement projection metadata (Tabled)
6. Tasks in software.libraries

14 tasks for MWG.