

Metadata Working Group Meeting, November 17, 2014

Present: Mary Beth Weber (co-chair), Jane Otto, Kalaivani Ananthan, Melissa De Fino, Rhonda Marker, Isaiah Beard, Yu-Hung Lin, Carla Zimmerman, Caryn Radick (recorder), Krista White

Excused: L. Sun

Due to server issues, the order of agenda varied from that sent prior to the meeting.

### 1. Announcements (All)

No Announcements

### 2. EAD Cataloging in WMS. (C. Radick)

C. Radick gave a demonstration of batch import and ingestion of Encoded Archival Description (EAD) finding aids into the Workflow Management System (WMS). EAD employs XML. Prior to importing into the WMS, the EAD xml instances are converted to MARC XML. The steps to import are as follows:

- Go to the batch import tab.
- Under step 1 (Mapping information), select "MARC" for metadata schema, "XML" for record format, and "EAD" for select a mapping
- Under step 2 (Upload metadata file(s)), select "no" for metadata files already uploaded, then select "local computer" for upload metadata from. Browse to the correct MARCXML file and select upload. Follow instructions on pop up box regarding "Select a record file to import dropdown box." Then select file.
- Leave values for Step 3 and 4 as "no." Click "Import" under import status. This process will load the metadata. The next step is to upload the associated xml file. Once this is done, the metadata should be reviewed and modified as necessary (in some cases, more information is picked up than is necessary and dates aren't coming through—these need to be checked). The file is then ingested.

Marker asked about whether stylesheet modifications were in the documentation. Radick was unsure as that end of the process is handled by TAS, so this needs to be followed up on.

### 3. AP review -- Faculty Submission (J. Otto)

J. Otto went over the SOAR application profile. R. Marker and J. Otto are both listed as contacts, J. Otto just during implementation phase.

In the general instructions tab of the spreadsheet: There is a note about values inherited from the deposit form. The AP includes a column indicating if a value is system-supplied or inherited from the form. Most elements on the form are optional, and WMS can only inherit a value if it was supplied on the form. If it was not supplied, and is readily available, the cataloger should supply it. An example would be Language.

In descriptive metadata, corporate names will now be supplied for departments and schools. This information is necessary for browse by school and department in SOAR portal.

Turning to workflow, J. Otto asked R. Marker to verify that her order is correct. Marker said before editing metadata, they check the files to make sure everything came in correctly. Appropriate relationship (RELS-EXT) is also created in the case of multiple versions. Cover sheets need only be regenerated if the version term assigned by the depositor is changed by the cataloger.

J. Otto's issues for discussion:

- What is the process for designating a secondary object so that it is not fully indexed (this is included in the RELS-EXT; “is version” is excluded in search, only “has version” is included. This is done after ingest through “manage relationship” in DLR Edit. Creating the RELS-EXT could go in general instructions of the application profile.
- Will descriptive events for version creation and version replacement be automatically created after R7.5? (No; nothing will be system supplied, so this part of the AP will have to be revisited. For now, Software Architecture will hold off on trying to automate this process as they’re not anticipating large numbers of superseding versions)
- What is the correct form of DOI in descriptive events? ([http://dx.doi.org/\[number\]](http://dx.doi.org/[number]); see version spec)
- Verified that "Version Creation" (not “primary version creation”) is correct type term for descriptive event.
- Verified technical metadata can be copied into this AP from R. Marker’s Journal Article AP; typically it’s limited to content model , size, and checksum, all system supplied.
- Rights metadata can also be copied in from R. Marker’s Journal Article AP
- If an author uses variant names, 1) use preferred form if known (check ORCID first); failing that, use the most frequently used form of name, and failing that, use the fullest form. The author can also be contacted when time permits.
- HR’s LDAP database lists small “departments” under some schools, which are not meaningful to the school and will not be sought by users (e.g., “Capacity Building Systems” under School of Nursing). In these cases, department names are omitted from the metadata, so they do not appear in the Browse school/department list. Departments in this category are indicated on the LDAP spreadsheet.
- R. Marker also asked how to handle articles where co-author was formerly (but not currently) affiliated with Rutgers. These will be treated as any other co-author, except the article can only be added to the co-author’s collection if that collection already exists; a collection cannot be created for a non-affiliate, since netID is typically required to create an author collection. In the case of joint Rutgers appointments, we may need to go with the LDAP affiliation, unless an author requests to be affiliated with a different department. In that case, the author collections have to be manually moved to the different department on the back end.
- R. Marker compared the SOAR AP with her Journal Article AP and didn’t see any conflicts.

4. Endnote/Refworks mapping (RM/KA)

R. Marker and K. Ananthan discussed work on the citation and export feature for next release. For R7.5, call went out to citation managers to help map the metadata. J. Otto did initial mapping between the schema and MODs (at basic level). During testing, testers have brought in issues with the mapping. These couldn't all be addressed in release 7.5, but will try to address in R7.6.

Chad Mills took copy of schema and mapped it in R7.5; R. Marker has done RefWorks mapping. We need to review both mapping, and give revised mapping to Chad to use for export feature in R7.6. Also need librarians with Refworks/Endnote experience to help with explaining what they're seeing on their end. Marker will work with refworks acct and Lin will help with Endnote. Once this is done, it can go to software architecture.

5. Entries in software.libraries

Not discussed as there was no access to software.libraries due to server problems.

6) WMS basics (Tabled)

7) Digital projects status report (Marker) (Tabled)