

WMS metadata updates, configuration ability to add new elements

WMS will develop a tool for an identified class of user to add, edit and delete elements for Descriptive Metadata, Rights MD, Source MD and Tech MD.

The Metadata Working Group has identified resource metadata and collection metadata new and changed elements that are needed now. If this tool can be delivered in R5.2, the sysAdmin or other identified user can make the necessary changes. If the tool cannot be delivered in this release, then the changes to the metadata must be made in the WMS. The metadata updates can be found in the folder below.

T:\rulib_metadata\WMS Version 2.2

Collection MD spreadsheet name is: OpenWMS_collection_metadata_july2010.xlsx
Resource MD spreadsheet name is: OpenWMS_Resource_Metadata_July2010.xls

*Kalaivani highlighted the changes in the spreadsheet.

WMS Rights event, ability to link rights event to administrative documents

The administrative documents are in a separate collection. In general, only the collection manager (CM), or those so designated by the CM, will need to view the administrative document. It is assumed that there can be multiple restricted documents that apply to a single resource object. There can also be a single restricted document that applies to multiple resource objects. Linking from metadata is needed in only one direction, i.e. it is only necessary to link from the resource object to the restricted document.

There are no WMS code changes in this section. WMS already writes the input in the Rights Event/Associated Object to the RightsMD. See below for details.

Under Rights Event, type="Permission or license"

AssociatedObject

Type	License
Name	Name of the License
Reference	Persistent URL (http://hdl.rutgers.edu/1782.2/rucore10001800001.ETD.17614)
Reference Type	Digital

*Assuming Shibboleth is working on mss3.

*DLR should have the ability to create the XACML for the restricted license document based on net id.

*See reference document at:

http://rucore.libraries.rutgers.edu/collab/ref/spc_sawg_r5_2_document_linking.pdf
http://rucore.libraries.rutgers.edu/collab/ref/spc_sawg_r5_2_etd_wms_interface.pdf

WMS Embargo XACML with rights event:

For FD, ETD and all other embargo object, WMS finds the item with Rights Event type: Embargo and detail is set, and then call the shared XACML class to create the XACML.

- When WMS see an object with rightsEvent type="Embargo"
- WMS will find the end date in <rulib:dateTime> and pass "yyyy-mm-dd" information to shared class.
- WMS will pass the datastream types which need to be blocked to shared class as well, e.g. PDF, DJVU etc..
- Shared XACML will create the POLICY XML based on the end date and types. It will convert the date to UTC date time and generate the XACML POLICY and return back to WMS. WMS will ingest the object with this XACML.
- The POLICY will block all the datastreams to the public. (i.e. PDF-1, JPEG-1, DJUV-1, XML-1, Video, Audio etc..).

See below for the sample of rights event:

```
<rulib:rightsEvent ID="2" authority="rulib">
```

```
<rulib:type>Embargo</rulib:type>
```

```
<rulib: dateTime encoding="w3cdtf" point="end" > yyyy-mm-dd </rulib: dateTime >
```

```
<rulib:detail>Embargo period: 2 years</rulib:detail>
```

```
</rulib:rightsEvent>
```

*There is no WMS user interface changes needed in release 5.2.

*See reference document at:

http://rucore.libraries.rutgers.edu/collab/ref/spc_sawg_r5_2_xacml_class.pdf

WMS date format:

1. Define <dateIssued> and <dateCreated> under originInfo.

2. Define the attributes provided below for all date elements in all types of metadata (descriptive, source, technical, rights). See MODS "Attributes Used Throughout the MODS Schema": <http://www.loc.gov/standards/mods/userguide/generalapp.html#list> for details.

Attribute	Obligation	Repeatable	CV	Usage
encoding	n	N	w3cdtf; iso8601; marc	
point	y	N	start; end	
qualifier	y	n	approximate; exact;	

			inferred; questionable	
keyDate	n	N	yes	keyDate=yes is a directive to sort on this date; allow only one keyDate per record.

- On the input form, for each date element, provide a row of four boxes with the following labels, as illustrated below:
From [date 1] To [date 2] Encoding [e.g. w3cdtf] Date is [e.g., approximate]
- In the originInfo area, provide a fifth box for ‘sort date’ after the other four:
From [date 1] To [date 2] Encoding [e.g. w3cdtf] Date is [e.g., approximate]
Sort date [e.g., yes]
- “Single date” and “Range Date” will no longer be split into two areas on the input form.
- In the Subject (Date) area, provide the 4 boxes (not sort date) immediately before (‘Term Source’ and ‘Date’). Change the current label ‘Subject (Date)’ to ‘Subject (Temporal).’ Add a label for the 4 boxes: ‘Date.’ Add a collective label for ‘Term Source’ and ‘Date’: ‘Date (Era).’ The user should be able to add a date under Date, or under Date (Era), or under both.
- The user must be allowed to input either a single date or a range of dates, or free-text for any date element.

Date1 is for a single date (structured or free text), or the initial date in a range. A single date must be input in the Date1 box; Date2 is for the end date in a range (structured or free text); it will be empty when a single date is provided.

A value in Date2 requires a value in Date1.

- Encoding: The value of each date is validated according to the encoding. (See below). Free text input will only be accepted when encoding is not specified.
- Point: If the user inputs a single date, xml should default to point=”start” and there will be no ‘end’ point.
If the user inputs a range of dates, Date1 should be coded point=”start” and Date2 will be coded point=”end”
- Qualifier: If the user specifies a qualifier of “exact,” or does not specify a qualifier, xml should default to qualifier=” ”
- Key date: This applies to originInfo dates only. Sort date is MODS keyDate, and is a directive to sort on this date in public displays; allow only one keyDate per record. In a range of dates, the keyDate is Date1. The user must specify yes (sort on this date) or no

(do not sort on this date). If a user specifies “yes” more than once within the originInfo dates, return the following error message “You can only have one sort date”

EXAMPLE:

- Single structured date

```
<originInfo>  
  <dateIssued encoding="w3cdtf" point="start" keyDate="yes" qualifier=""  
>1856</dateIssued>
```

Range of structured dates:

```
<originInfo>  
  <dateIssued encoding="w3cdtf" point="start" keyDate="yes" qualifier="">1856  
</dateIssued>  
  <dateIssued encoding=" w3cdtf " point="end" keyDate="no" qualifier=""  
>1862</dateIssued>
```

- Single free text date

```
<dateIssued encoding=" " point="start" keyDate="no" qualifier="">360  
B.C.E.</dateIssued>
```

Range of free text dates

```
<dateIssued encoding=" " point="start" keyDate="no" qualifier="">360  
B.C.E.</dateIssued>  
<dateIssued encoding=" " point="end" keyDate="no" qualifier="">300  
B.C.E.</dateIssued>
```

3. For all date elements where encoding="w3cdtf" allow and validate as follows (cf. <http://www.w3.org/TR/NOTE-datetime> and <http://www.w3.org/TR/xmlschema-2/#dateTime>):

Year:

YYYY (eg 1997)

Year and month:

YYYY-MM (eg 1997-07)

Complete date:

YYYY-MM-DD (eg 1997-07-16)

Complete date plus hours and minutes:

YYYY-MM-DDThh:mmTZD (eg 1997-07-16T19:20+01:00)

Complete date plus hours, minutes and seconds:

YYYY-MM-DDThh:mm:ssTZD (eg 1997-07-16T19:20:30+01:00)

Complete date plus hours, minutes, seconds and a decimal fraction of a second

YYYY-MM-DDThh:mm:ss.sTZD (eg 1997-07-16T19:20:30.45+01:00)

Note:

YYYY = four-digit year

MM = two-digit month (01=January, etc.)

DD = two-digit day of month (01 through 31)

hh = two digits of hour (00 through 23) (am/pm NOT allowed)

mm = two digits of minute (00 through 59)

ss = two digits of second (00 through 59)

s = one or more digits representing a decimal fraction of a second

TZD = time zone designator (Z or +hh:mm or -hh:mm)

This profile does not specify how many digits may be used to represent the decimal fraction of a second. An adopting standard that permits fractions of a second must specify both the minimum number of digits (a number greater than or equal to one) and the maximum number of digits (the maximum may be stated to be "unlimited").

This profile defines two ways of handling time zone offsets:

- Times are expressed in UTC (Coordinated Universal Time), with a special UTC designator ("Z").
- Times are expressed in local time, together with a time zone offset in hours and minutes. A time zone offset of "+hh:mm" indicates that the date/time uses a local time zone which is "hh" hours and "mm" minutes ahead of UTC. A time zone offset of "-hh:mm" indicates that the date/time uses a local time zone which is "hh" hours and "mm" minutes behind UTC.

4. For other encoding or unspecified encoding, accept input without validation. [NOTE: This is the only way to accommodate BCE dates. Otherwise follow DLF/Aquifer Guidelines in eschewing free text alphanumeric strings. See pp. 12-13 below.]

*See reference document at:

http://rucore.libraries.rutgers.edu/collab/ref/spc_sawg_r5_2_document_linking.pdf

WMS Collections (Owner):

- Organization records are now named "Owner" records. – WMS should list collections instead of organizations.
- An owner record will store a corporate name. A drop down list will be available when creating a collection object. However, personal name of the owner will be entered at the time a collection object is created. This information need to be re-entered when a sub collection is created.
- If the owner (organization or person) has a webpage link, add to the owner record. – Rhonda should provide a metadata field for WMS to collect this information. Owner record URL inherited in the owner's collection records – WMS should provide an API interface for RUCORE to display the owner record URL. For R5.2 the search portal will need to display collection owner information in either brief or full record displays. This collection owner information is not part of the ingested objects metadata. The

information is stored in the WMS database. For R5.2 the WMS will need to make available the collection owner information through an API. Because an object might be part of one or many collections the search portal will provide one or many collection ID's to the WMS. The WMS will return collection owner information and the search portal code will integrate that information into the record displays.

Ideally the WMS API will

...be REST based

...require one parameter, an array, of collection id(s)

...return collection owner information in an XML document.

- Only inherit the owner name into resources. Do not inherit the owner URL into the resource record. Owner URL remains in the collection object and dynamically displays in the resource record.
- If a collection record is changed using Fedora Edit, update the collection record in Fedora and also update the stored collection record in WMS. WMS should have the ability to edit collection record.
- If a collection record is changed using Fedora Edit, and if one of the changes includes a change to the owner URL, then also update the URL in the stored owner record in WMS. WMS should enable to edit organization record as well.
- Allow reorganization of collection in WMS listing. It's a bug fix.
- Add an option to display an alphabetical listing of all collections for which a user is authorized.
- Enhancement: Add batch import capabilities in Faculty Collections. (next release)
- Allow cataloger to assign the portal ID at the time of ingests. The cataloger should be able to select portals from an authoritative list at the time of ingest. (next release)