

UNDERSTANDING METADATA

What It Is, Why It Is Important, & How to Implement
It

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Outline

I. What is metadata?

- A. What has always been there
- B. History of balance
- C. Representation with language

II. Why is metadata important?

- A. Resource discoverability
- B. Systems interoperability
- C. Resource management

III. How do we implement metadata practices?

- A. Systems, tools, & staff
- B. Collection needs
- C. Metadata Application Profiles (MAPs)

IV. Case Study: OSU Metadata Department

V. Summary

WHAT IS METADATA?

What Has Always Been There
History of Balance
Representation with Language



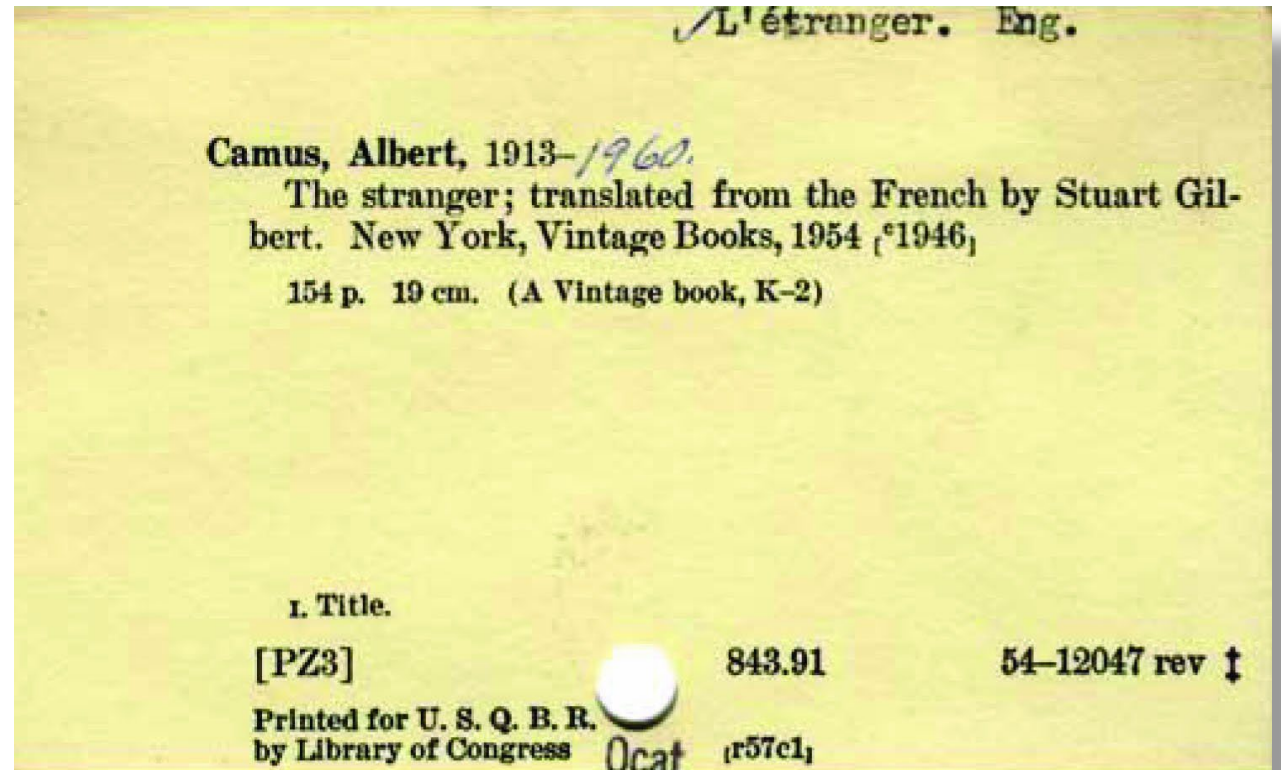
What Has Always Been There

Bibliographic resource description

- We know:
 - what these values are
 - how they're formatted
 - how they're organized
- But computers don't!

Metadata = “Data about data” for:

- user access
- records management



1

Metadata is bibliographic description for the digital age!

History of Balance

MARC

```
100 1_ |a Niemyer, Elizabeth Schnebly, |d 1925-
245 14 |a The reign of the horse : |b the horse in print, 1500-1715 : an exhibition /
260 __ |a Washington, D.C. : |b Folger Library Publications, |c c1991.
300 __ |a 64 p. : |b ill. ; |c 22 x 28 cm.
500 __ |a Catalog of an exhibition on display Oct. 3, 1991-Jan. 25, 1992.
504 __ |a Includes bibliographical references (p. 62-64).
650 _0 |a Horses |v Bibliography |v Exhibitions.
610 20 |a Folger Shakespeare Library |v Exhibitions.
655 _7 |a Exhibition catalogs. |2 rbgenr
700 1_ |a Scola, Susan.
700 1_ |a Dent, Anthony Austen.
710 2_ |a Folger Shakespeare Library.
```

2

Non-MARC

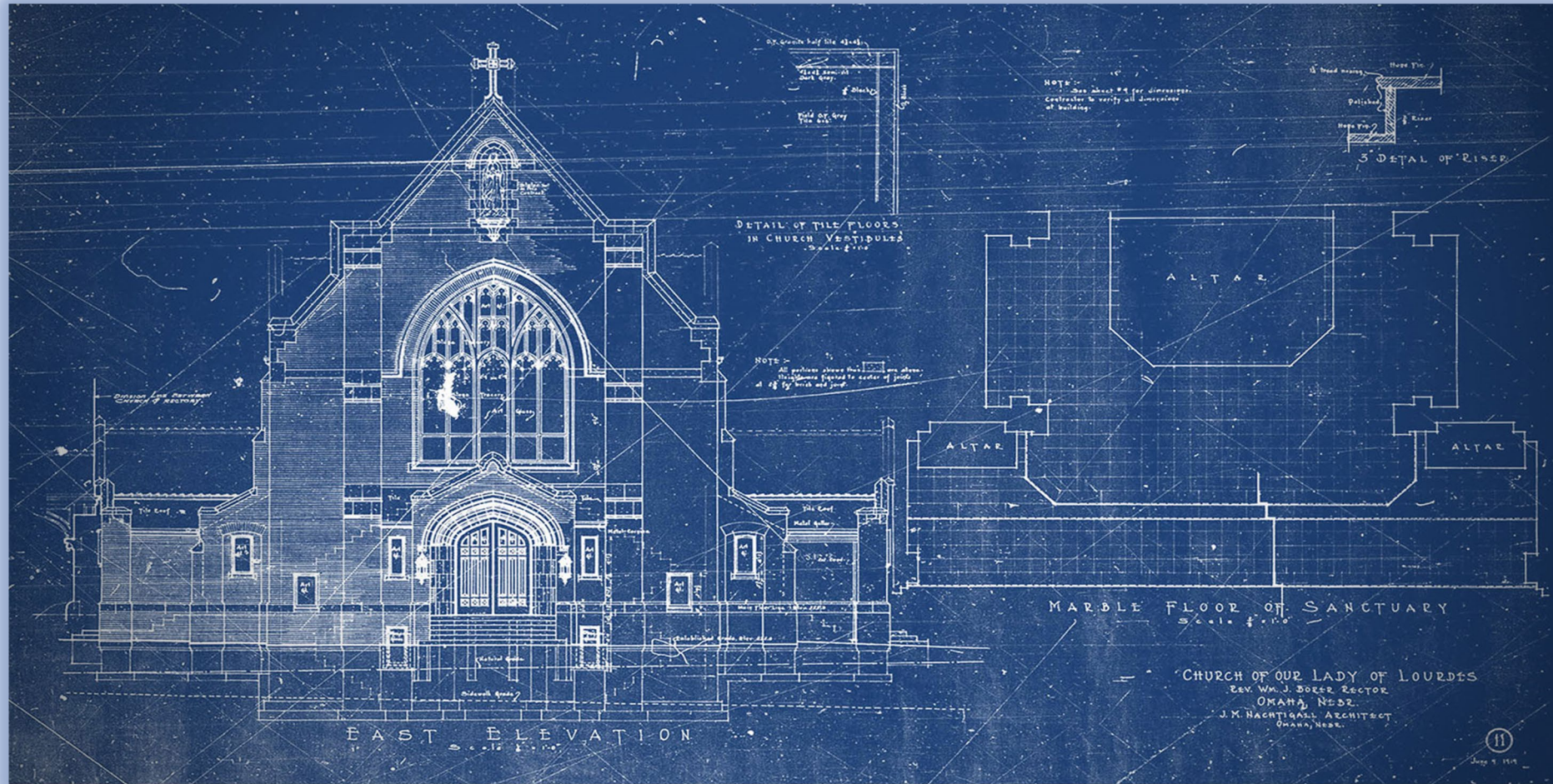
```
<?xml version="1.0" encoding="utf-8"?>
<rdf:RDF xmlns:rdf="http://www.w3.org/1999/02/22-rdf-syntax-ns#"
xmlns:dc="http://purl.org/dc/elements/1.1/">
  <rdf:Description>
    <dc:title>Homage to Catalonia,</dc:title>
    <dc:creator>Orwell, George, 1903-1950.</dc:creator>
    <dc:type>text</dc:type>
    <dc:publisher>London, Secker and Warburg</dc:publisher>
    <dc:date>[1938]</dc:date>
    <dc:language>eng</dc:language>
  </rdf:Description>
</rdf:RDF>
```

3

Balance machine functionality & human compatibility.

5

Representation with Language



4

Clear, consistent language = successful navigation & discovery

WHY DO WE NEED METADATA?

Resource Discoverability
Systems Interoperability
Resource Management

Resource Discoverability

What details enable user access?

Resource Specifics

What is the **title** of the resource?

Who created the resource?

When was the resource **created**?

What is the **genre/material** of the resource?

User Interests

What is the resource **about**?

Why was the resource **created**?

Why is the resource **important**?

What other materials are related?

What schemas/vocabularies best capture this description?

More description = more access = greater discoverability

Systems Interoperability

Goals:

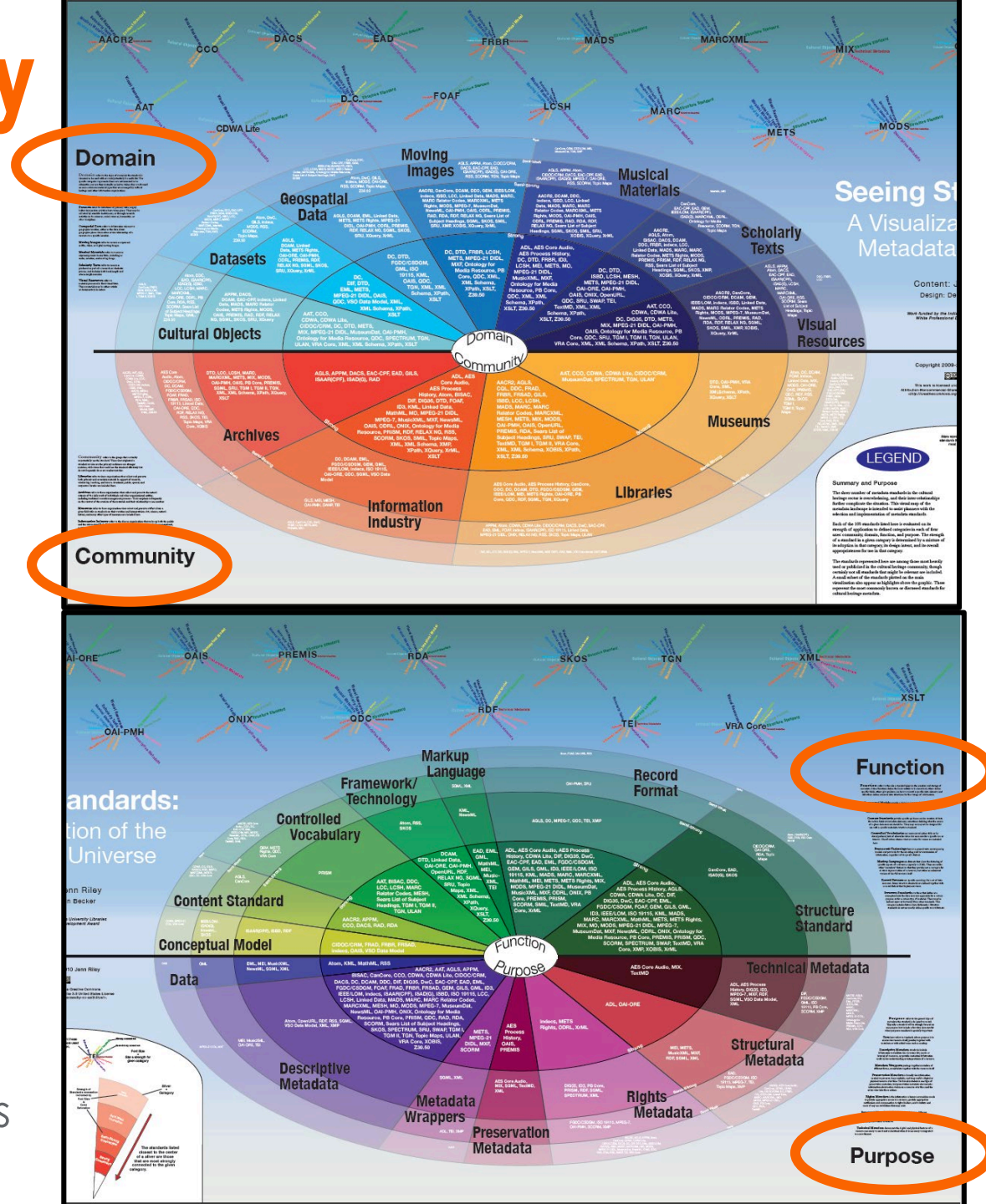
- Comprehensible, exchangeable metadata
- Universal language

Method & Means:

- Content description standards
- Open metadata standards
- Controlled vocab. & authority files

Riley, J. (2010.) Seeing Standards: A Visualization of the Metadata Universe. Indiana University Libraries. <http://jennriley.com/metadatamap/>.

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Resource Management

Repositories & Management Systems = SAFE ENVIRONMENTS for METADATA DEVELOPMENT

Improve management efficiency

- Define practices for consistency
- Apply automated workflows to enable batch processes

Develop & apply tools for analysis

- Target metadata fields & values
- Track resource usage
- Identify user interests

Expand function of metadata

- Descriptive
- Technical
- Administrative

Good metadata improves digital management practices.

HOW DO WE IMPLEMENT METADATA PRACTICES?

Systems, Tools, & Staff

Collection Needs

Metadata Application Profiles

Systems, Tools, & Staff

The Ideal...

- Amply-staffed teams
- Great financial support
- Advanced technologies
 - Accurate metadata
 - Range of available schemas
 - Freedom to test and choose

...vs. the Reality

- Limited staff
- Limited funding
- Available technologies
 - What can you afford?
 - What can you man?
 - What metadata is available?

The art of taking lemons and making lemonade.

Collection Needs

Contents vary

- **Materials**
- **Genres**

Schema focus varies

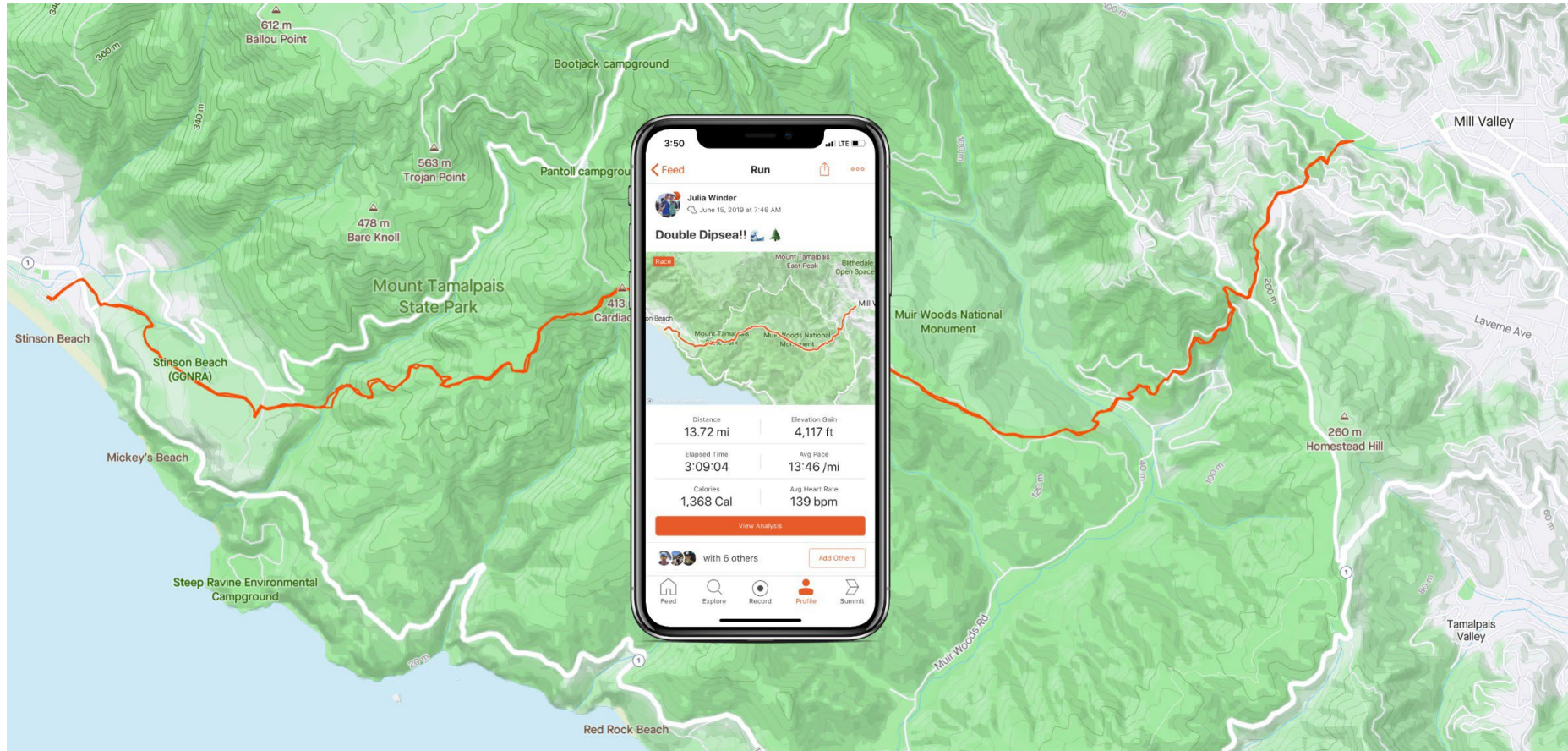
- **Domain**
- **Community**
- **Function**
- **Purpose**

Systems have rules

- **Schema used**
- **Fields available**
- **Value formatting**

Balance collection needs with system parameters.

Metadata Application Profiles (MAPs)



Every collection needs a MAP to guide its metadata creation.

CASE STUDY

OSU's Metadata Department

OSU Metadata: Who Is Our Team?

The screenshot shows the OSU Edmon Low Library website. The header includes the OSU logo, the library name "EDMON LOW LIBRARY & Branch Libraries", and navigation links for "Today's Hours", "Renew / Login", "Directory", "Calendar", and "Quicklinks". A search bar is present with the text "Search the library website". Below the header is a navigation menu with links for "Research Tools & Collections", "Help & Services", "Study Spaces & Computers", "About The Library", "Ask Us", and "Chat".

The main content area is titled "Metadata". The text reads: "The Metadata Unit supports the mission and vision of the Library in the planning, development, creation, enhancement, and implementation of non-MARC metadata standards that facilitate discoverability and access to scholarly and cultural heritage resources in digital collections."

On the right side, there is a "Department Staff" section with a link for "Chartier, Madison" circled in orange. Below it is a "Contact Information" section with the following details:

Metadata
215 Library
Edmon Low Library
Stillwater, OK 74078
P: 405-744-9161

On the left side, there is a "Popular Links" section with the following links: Request Forms, Library Services, Endnote & Zotero, About the OSU Libraries, Give to the Library, Friends of the Library, Branches & Departments, Anywhere Library Access, Library Jobs, and Give Us Feedback.

Sparse, lean, & mean.

Who Is Our Team? (cont.)

ACTUAL TEAM:

- 1 Department Head
- 1 Metadata Librarian
- 6 Student Employees

Reflects current reality of metadata implementation

- People learning to work in a new emerging field
- Libraries & library schools are still catching up



6

Metadata is still BRAND new!

Systems & Tools

DSpace → SHAREOK

The screenshot shows the SHAREOK website. At the top, it says "SHAREOK" and "advancing Oklahoma scholarship, research and institutional memory". Below that is a search bar and a navigation menu. The main content area is titled "SHAREOK Repository" and contains several paragraphs of text explaining the repository's purpose and how to use it. On the left side, there are several filters and sections: "BROWSE" with options like "All of SHAREOK", "Communities & Collections", "By Issue Date", "Authors", "Titles", "Subjects", and "By Series"; "MY ACCOUNT" with a "Login" button; and "DISCOVER" with a list of authors and their collection counts.

CONTENTdm → OSU Digital Collections

The screenshot shows the OSU Digital Collections website. At the top, it features the OSU logo and the text "DIGITAL COLLECTIONS OKSTATE LIBRARY" and "Oklahoma State University Collections". Below that is a navigation menu with "Home", "Browse", "Library", and "Log in". There is a search bar with a magnifying glass icon and a link to "Advanced Search". The main content area is titled "Welcome to the Oklahoma State University Library Digital Collections" and contains several paragraphs of text. Below that is a pagination bar showing "Collections 1-10 of 74" and a "Go to page" dropdown. The main content area is divided into several sections, each with a thumbnail image and a title: "Agricultural Cooperative Extension", "Agriculture Economic Papers", "Architecture Reports", and "The 'Big Top' Show Goes On Oral History Project".

Friendly systems that permit freedom & flexibility...

...BUT Metadata Still Needs Guidance!

Customization compromises interoperability...


Inconsistency compromises data management...

Why open standards and MAPs are
SO IMPORTANT!

Rules and structure augment capability!

Dublin Core: A Good Place to Start

- “Founding Father” of metadata schemas!
- Offers basic bibliographic description
- **WIDELY USED!**
- Qualified Dublin Core offers greater specificity when needed



Dublin Core Elements		
Rights	Contributor	Creator
Subject	Coverage	Title
Publisher	Identifier	Description
Type	Date	Source
Relation	Format	Language

7

Everyone knows Dublin Core.

MAPs Will Guide Your Metadata

	A	B	C	D	E	F
1	Field Name	Value	Schema	Comments	Registry	Examples
2	filename			Locally-generated filename. Should match osu.filename value. Example reflects current filenaming practice for ETDs submitted through UMI ProQuest.		Luna_okstate_0664D_10551.pdf Thesis-1936-C14e.pdf Thesis-378.76-O-Y087M.pdf
3	dc.contributor.advisor			Enter the name as seen on the piece, following the format: last name, first name middle name, suffix. Use a space between initials.		Ghemjar, A. J. Rose, Marie Edith Crowley, Bob
4	dc.contributor.author			Enter the name as seen on the piece, following the format: last name, first name middle name, suffix. Use a space between initials.		Acay, Lemi Daghan Foutch, G. L. Robinson, Robert L., Jr.
5	dc.contributor.committeeMember			Enter the name as seen on the piece, following the format: last name, first name middle name, suffix. Use a space between initials. For multiple authors, enter all in one field, separating names with double pipelines () and no space.		Chandler, J. P. Leslie, David, Jr.
6	dc.date.issued	YYYY-MM	W3C-DTF	Enter the date as seen on the title page.		2004-05
7	dc.description.abstract			Use abstract as supplied by author. Remove indicators of "Abstract:" from the beginning of the abstract. Separate paragraphs with double pipes (). Do NOT include keywords. Prefaces, introductions, and abstracts written for isolated chapters should NOT go in this field.		
	dc.format	application/pdf	IMT	NOTE: Additional values may be added to this column if supplemental material		application/pdf image/jpeg application/javascript

From MAP to Metadata

MAP

	A	B	C	D	E	F
1	Field Name	Value	Schema	Comments	Registry	Examples
	filename			Locally-generated filename. Should match osu.filename value. Example reflects current filing practice for ETDs submitted through UMI ProQuest.		Luna_okstate_0664D_10551.pdf Thesis-1936-C14e.pdf Thesis-378.76-O-Y087M.pdf
2	dc.contributor.advisor			Enter the name as seen on the piece, following the format: last name, first name middle name, suffix. Use a space between initials.		Ghemjar, A. J. Rose, Marie Edith Crowley, Bob
3	dc.contributor.author			Enter the name as seen on the piece, following the format: last name, first name middle name, suffix. Use a space between initials.		Acay, Lemi Daghan Foutch, G. L. Robinson, Robert L., Jr.
4	dc.contributor.committeeMember			Enter the name as seen on the piece, following the format: last name, first name middle name, suffix. Use a space between initials. For multiple authors, enter all in one field, separating names with double pipelines () and no space.		Chandler, J. P. Leslie, David, Jr.
5	dc.date.issued	YYYY-MM	W3C-DTF	Enter the date as seen on the title page. Use abstract as supplied by author. Remove indicators of "Abstract:" from the beginning of the abstract. Separate paragraphs with double pipes (). Do NOT include keywords. Prefaces, introductions, and abstracts written for isolated chapters should NOT go in this field.		2004-05
6	dc.description.abstract			Remove indicators of "Abstract:" from the beginning of the abstract. Separate paragraphs with double pipes (). Do NOT include keywords. Prefaces, introductions, and abstracts written for isolated chapters should NOT go in this field.		
7	dc.format	application/pdf	IMT	NOTE: Additional values may be added to this column if supplemental material		application/pdf image/jpeg application/javascript

- Excel Workbook
- Metadata fields on the left
- Instructions on formatting
- Examples of possible/expected values
- Links to additional resources

Metadata

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	
1	filename	dc.contributor	dc.contributor	dc.date.issued	dc.description.abstract	dc.format	dc.identifier	dc.identifier	dc.identifier	dc.identifier	dc.identifier	dc.identifier	dc.identifier	dc.identifier	dc.identifier	dc.identifier	dc.identifier	dc.identifier	dc.identifier	dc.identifier	dc.identifier
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- File format system requires
- Metadata fields are header row
- Each row is a record
- Each cell under a certain field contains the appropriate value

Desired Result

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	filename	dc.contrib	dc.contrib	dc.contrib	dc.date.is	dc.descrip	dc.format	dc.rights	dc.title	dc.type.ge	dc.type.m	osu.acces	dc.descrip	dc.langua	osu.filename					
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16	Hess_okst	Link, Step	Hess, Eun	Caplow, N	#####	This study	applicatio	Copyright	Intercultu	Thesis	Text	Open Acc	English	en_US	Hess_okstate_0664M_15571.pdf					
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18	Wallace_c	Ochoa-Co	Wallace, S	Rebek, Eri	7/1/2018	The grape	applicatio	Copyright	Detection	Thesis	Text	Open Acc	Entomolo	en_US	Wallace_okstate_0664M_15922.pdf					
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Summary

Metadata makes a HUGE impact!

Enables resource discoverability

- Open metadata standards
- Controlled vocabulary
- Descriptive standards

Broadens user access via interoperability

- Your institution and beyond!
- Digital access = universal access

Improves resource management

- Consistent values = better collection assessment
- Self-evaluation = continued development

Metadata drives modern information exchange!

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<https://info.library.okstate.edu/c.php?g=916329>

THANK YOU!



Images

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