



# TDL Forum

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*WEDNESDAY, OCTOBER 21, 2015*

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*Executive Director*

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*Assistant Director*



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# Agenda

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- Marketing Coordinator
- ETD Metadata Guidelines
- DSpace 5 Upgrades

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# Welcome Laura Waugh!

TDL Marketing  
Coordinator



# Texas Road Trip 2015



- ✓ Texas Tech – April 6
- ✓ West Texas A&M – April 7
- ✓ Sam Houston State University – June 19
- ✓ University of Houston – June 24
- ✓ UTMB Galveston – July 7
- ✓ Texas A&M University – July 27
- ✓ Texas State – August 20
- ✓ UT Arlington, UT Southwestern – August 25-26
- ✓ Trinity, TAMU-Corpus Christi – September 1-2
- ✓ TAMIU – September 18
- ✓ University of Houston – October 14
- ✓ Angelo State University – October 20

More to come...

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# TDL ETD Metadata Working Group

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## Descriptive Metadata Guidelines and Report

Long, K., Lyon, C., Park, Kristi. Potvin, S., Rivero, M. & Thompson, S. (2015, October)  
*Updating Metadata Guidelines to Improve ETD Discoverability and Use*. Presentation at  
the 2015 US ETD Association Conference, Austin, Texas.

<https://conferences.tdl.org/usetda/index.php/USETDA/USETDA2015/paper/view/782>



# 2008 Guidelines

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The 2008 group's charge:  
To “support TDL's goal of a single, unified collection of ETDs” by working to “identify the issues and policies involved with ETDs in the member institutions, and make recommendations to the team charged with the development of an ingestion application [Vireo].”



## **Texas Digital Library Descriptive Metadata Guidelines for Electronic Theses and Dissertations**

**Version 1.0**

June 2008

Prepared by the  
**TDL Metadata Working Group:**  
Amy Rushing (The University of Texas at Austin) - Chair  
Jay Koenig (Texas A&M University)  
Anne Mitchell (University of Houston)  
William Moen (University of North Texas)  
Tim Strawn (The University of Texas at Austin)  
Jason Thomale (Texas Tech University)

# Why update?

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Inconsistent application

New use cases

Vireo development

Need for systems & standards to work together

# Working Group Members

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- ★ Santi Thompson (University of Houston)
- ★ Monica Rivero (Rice University)
- ★ Sarah Potvin (Texas A&M University) - Chair
- ★ Kristi Park (Texas Digital Library)
- ★ Colleen Lyon (University of Texas) - Liaison to Vireo User Group
- ★ Kara Long (Baylor University)



# Our Charge

The TDL ETD Metadata Working Group will provide guidance to TDL member institutions and other ETD practitioners on metadata for electronic theses and dissertations, with a particular focus on works published through the Vireo ETD submission and management application.

(1) **Update the “Descriptive Metadata Guidelines for Electronic Theses and Dissertations (Version 1)”** to reflect current and emergent practices;

(2) Evaluate the recommended metadata guidelines for **divergences with current Vireo functionality** and make recommendations to the Vireo Users Group for correcting those divergences;

(3) Publish and **promote use of the updated guidelines** among TDL members and Vireo users.

All work of the group will be done in close cooperation with the Vireo Users Group and TDL staff.

# Read all about it!!

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TDL Repository: <http://hdl.handle.net/2249.1/68437>



# Divergence from 2008 standard

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Schema based on qualified Dublin Core rather than MODS

MODS -> DC switch means some element names changed

- Origin Information -> Date
- Physical Description -> Format
- Location (URL) -> Identifier
- Record Information -> removed because info is captured automatically by repository system

New elements

Rights metadata

Author identifiers (ORCID)

Description (non-abstract)

Mappings to OAI-ETD and Google Scholar's Highwire Press tags

# Task & Review Group Members

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Daniel Alemneh (University of North Texas)

Shelley Barba (Texas Tech University)

Christine Brown (Texas A&M University)

Melanie Cofield (University of Texas)

James Creel (Texas A&M University)

Thomas Dowling (Wake Forest University)

Jeremy Huff (Texas A&M University)

Sevim McCutcheon (Kent State University)

Billie Peterson-Lugo (Baylor University)

Amy Rushing (University of Texas at San Antonio)

Ben Steinberg (Harvard University)

# Additional Thanks To:

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Informal interview participants

Attendees at the 2015 Texas / US Region 3 ETD Association

Ryan Steans (Texas Digital Library)

Vireo Steering Group members who reviewed the recommendations

- Stephanie Larrison (Texas State University)
- Joy Perrin (Texas Tech University)
- David Reynolds (Johns Hopkins University)
- Laura Spradlin (University of Illinois at Urbana-Champaign)

# Next Steps

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- Tips for aligning legacy data with updated standard
- Emerging case studies:
  - Linked Data
  - Fedora
  - Preservation
  - Beyond the Union Catalog
  - Beyond the PDF



# Vireo 4 Development and ETD Metadata Working Group Recommendations

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- Vireo 4 completely re-written
- Primary purpose: create ability to configure separate submission/management workflows for different constituencies (e.g. Undergraduate Honors Theses versus Graduate Level Theses/Dissertations)

## Implications for ETD MWG recommendations:

- Locally controlled authority files for advisors and faculty members
- CC license option
- Greater control over mapping of metadata fields to DSpace/Dublin Core
- Default Vireo install will include recommendations for mapping of elements (including mapping of graduation date instead of approval date to dc.date.issued)

# DSpace 5 Upgrade Path

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## **DSpace 5 Working Group:**

- Angelo State - Susan Elkins
- Southwest Collection at TTU - Robert Luttrell
- Texas A&M Galveston - Alexandra Mitchell
- Texas A&M Galveston - Laura McElfresh
- Texas A&M International - Nerissa Lindsey
- Texas Tech University - Le Yang

# DSpace 5 Upgrade Path

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Week 1: Friday Oct. 2- 1:30 PM	First Meeting of DSpace 5 Working Group	Review DSpace 5 Documentation - understand the new features, set review plan
Week 2: Wednesday the 7th – 10:30 AM	Second Meeting of WG	Collect initial observations, plan for additional testing
Week 3: Wednesday the 14th – 10:30 AM	Third Meeting of WG	Discuss Which features will be turned on and turned off. Assign work for each part of communication/ training
Week 4: Wednesday the 21st - 1:30 PM	Fourth Meeting of WG	Share and Review outlines of work
Week 5: Wednesday the 28th – 1:30 PM	Fifth Meeting of WG	Review documentation
Week 6: Wednesday the 4th – 1:30 PM	Sixth meeting of WG	Finalize documentation/ plan webinar
Week 7: Wednesday the 11th -1:30 PM	Seventh Meeting of WG	Go over webinar
Week of 11/16	Eighth Meeting of WG	Have webinar materials ready for deployment

# DSpace 5 Upgrade Path

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## DSpace 5 Features Under Review

1. [ORCID Integration](#)
2. [Report Google Analytics statistics from Admin UI](#)
3. [Track file downloads in Google Analytics statistics](#)
4. [Autogenerate PDF citation "cover pages" for all PDFs](#)
5. [Sherpa/Romeo lookup during item submission process](#)
6. Rendering MathML code in abstracts using MathJa
7. Ensure "page not found" error pages use configured theme
8. Performance improvements for "Select Collection" dropdown in submission process
9. [Enhanced PDF Thumbnails can now be generated using ImageMagick and Ghostscript](#)
10. DOI Support
11. Batch Imports from the User Interface
12. Video
13. MP3 Audio
14. Metadata
15. OAI

# DSpace 5 Upgrade Path

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- DSpace 5 Webinar or Webinars (probably week of December 2)
- Upgrade DSpace 4 to DSpace 5 with Working Group
- No Test DSpace instance (upgrade in place)
- Will review and make changes
- See if anyone wants to review a stage instance with a testing plan
- January 2015 – Upgrade remaining DSpaces

# Other Projects

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- Dataverse Review underway with Dataverse working group
- Vireo 4 Development – expect announcements for public review in the future
- DSpace users with URL “repositories.tdl.org” will soon be contacted regarding a change to “school-ir.tdl.org” with a re-direct
- Moving OJS from one type of computer to another (you won’t notice, but saves us \$\$\$)



# Questions and Discussion

