



# Metadata Workflows: Designing Workflows for Metadata Creation and Remediation



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In December of 2017, the Metadata Task Group was formed in response to answer a two part problem. One was to determine the metadata workflow for projects being placed into A&M OAKTrust digital repository. The other was to recommend metadata schema for the DAME, a relatively new concept design to create an inter-operability system involving multiple formats and computer programs. Although much of the focus was on how to handle workflow for digital projects and suggest metadata schema for two specific platforms (D-Space and Fedora), it soon became obvious to the task group that all metadata must be compatible with metadata in other systems within the DAME. Thus, we explored the necessity of consistent metadata and imputing standards in order to provide maximum accessibility to our users, while also trying to be efficient with library resources.

## Other Considerations Going forward

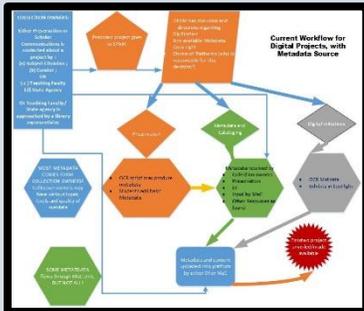
In the course of looking at the need for metadata consistency, one issue was mentioned by all units and parties consulted. The lack of a consistent name for creator has caused a great deal of problems for people using the OAKTrust repository. For example, often the OAKTrust mailbox will receive e-mails from authors who would like all of their articles and/or works to be available under one form of their name. But because of a variety of imputing inconsistencies, OAKTrust lists their names a multiple ways. Even if the only difference is the addition of a period at the end of an initial, there would be a separate entry for the same person. This causes problems for people trying to gather all information by one person or department.

It is not always obvious to others not in a unit what processes are being undertaken in other sections of IR with regards to metadata and the repository. Clarifying roles in different projects and tasks would result in a more lean workflow and reduce any duplication of effort. Problem solving can be a more effect process.

Different units have different expertize and there for different professional vocabularies. Sometimes these vocabularies are referring to the same issue, but there is confusion in meetings because each person is using different terms to describe similar, if not the same ideas. Clarification of terms and education across units could help alleviate this problem.

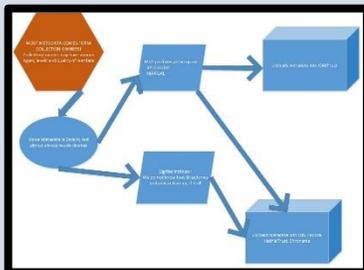
Technical services processes were developed in the mid-20<sup>th</sup> century, where factory processes were dominate. This worked very well and effectively for the processing of physical items, but less so for the processing of electronic items. It also resulted in a siloing of expertize. However, what we are attempting in both the physical and digital environment is to organize information. To create surrogates which provide access points for our users. By encouraging communication between units, various problems can be examined by people with expertize in different areas and better solutions to problems can be found.

## Current workflow for digital projects



Most metadata starts with the collection owners who can be anyone: a subject librarian, a curator, teaching faculty, etc. Anyone associated with A&M can approach the libraries to have a collection entered into OAKTrust. Often, the proposed project goes to SPAM (an advisory group to oversee digitization) who decides how to proceed. Metadata is then collected by preservation (Some possible metadata flows through DI as well) and sent to MaC (the Metadata and Cataloging Unit). MaC then utilizes a variety of sources (the collection owners, preservation, DI, OCR script, etc.) to prepare a spreadsheet of metadata that can be batch uploaded into the OAKTrust.

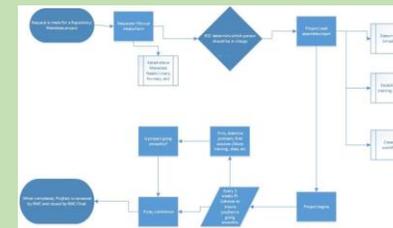
## Current metadata workflow



It is important to note that not all projects go through digitization. Some collections have already been digitized and therefore the process starts with MaC. Also not all metadata goes through MaC. Some goes directly from Preservation to be uploaded into the designated platform (Usually OAKTrust) by Digital Initiatives. As a result, the above graphic is a very simplified expression of the current process. There is really not standardize process where every unit is involved or if it's even known what units may need to be involved in any process.

## Suggested workflow

In order to simply metadata workflow, we are suggestion that it would be best to begin with gathering all information from the collection owner as soon as possible and not beginning the process of uploading or digitizing a collection until all necessary information is gathered. From there, metadata templates will be used to organize metadata under the auspices of a metadata librarian., also known as a project lead.



Checking in ever two weeks to determine that the metadata is accessible and that the project is being completed. At the end of the project, the standing Repository Committee with review both the collection and its metadata to ensure quality and completeness.

## The DAME



The DAME (Digital Asset Management Ecosystem) uses an ecosystem model to conceptualize the online network of websites, services, vendor platforms, systems, and tools that make up the digital architecture of how users experience the Libraries online. This will ensure that development of the Libraries' web presence will be collaborative, take parts in view of the whole, and enable dynamic and fluid connections between different parts of the ecosystem.