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Pampering Uploaders: Easing the Metadata Upload Process A “Five” Minute Lightning Talk

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Wayne State University, Detroit, Michigan**

Wesleyan Holiness Digital Library

For the past three years, I have been involved with the creation of a made-from-scratch institutional repository, a theological IR that is currently being created by and supported by the Nazarene Church, the denomination with which my university is related. The repository specifications, design, and ongoing development are being led by a team of 15-20 Nazarene librarians and denominational leaders who meet in person once a year and monthly via conference calls. So an open source software developer named Longsight, of Independence, Ohio (<https://www.longsight.com/>), was hired in the Fall of 2012 and they programmed the it in PHP using the Drupal Content Management System, going live in June, 2013, at <http://www.whdl.org>, an institutional repository called Wesleyan Holiness Digital Library.

WHDL is now starting to give birth to university IRs using the same engine, the first going up at MidAmerica Nazarene University in Olathe, Kansas, in April, 2015. The goal is to provide daughter IRs to most of the over fifty Nazarene institutions around the world (as long as they have an adequate electrical infrastructure for the IR to run on) as well as to other Protestant denominational universities who are in the same Wesleyan theological universe.

A key specification desired by this group at the very beginning was that the IR had to be fully multilingual, a difficult hurdle to jump, since even Digital Commons cannot yet provide that. To be truly multilingual there must be three areas in the software where the language must be compatible and relate correctly to each other: the documents themselves (the easiest hurdle), the metadata, and the interface which includes the navigational words to get around in the program (also called the site language). WHDL went live with five site languages – English, French, Portuguese, Spanish, and Korean – and has documents up now in 58 different languages.

IR Metadata Form Quality Factors

I asked the question during my presentation, “How many of you present here today were catalogers before you became IR Librarians?” The answer was zero. And now they find themselves creating metadata and having to make their cataloging public and loving it? As one of my colleagues said once, “If I have to explain to my assistants how to do the metadata creation and uploading repeatedly because the metadata form is obtuse and unfriendly, I get cranky.” And of course, she is right. She’ll probably be doing less online publishing if she and her helpers have to struggle with the

software form and uploading process. Fortunately, Digital Commons has done a pretty good job at keeping its metadata forms user friendly.

So, first, the form should be as simple as we can make it. Hide metadata fields that are not needed for the document type at hand. For example, why have “volume” and “issue” fields if you’re cataloging a book? ETDs (Electronic Theses and Dissertations) need mentor name fields; other document types don’t. Second, add fields that you need but other universities may not. For example, Olivet attaches a scholarship domain (based on Ernest Boyer’s work) to each work of scholarship we put up, which is fairly unique amongst Digital Commons customers. But Digital Commons’ support staff had no problem creating that for us. Other fields you may have to ask for if you want them are “Creative Commons Licenses,” “Peer Reviewed Y/N,” “embargo period,” “indexes by year for long lists of journal issues,” etc. Third, use dropdown lists to pick options when options are limited and known. And fourth, make the most-often-chosen option into the readily visible default option. All of these will save time and cut down on confusion.

Questions

I also asked the following questions of the Digital Commons users present.

1. What customizations to your metadata upload forms have you implemented that were helpful? Other than original setup, apparently not much.
2. How many of you regularly use the bulk upload process? Less than a third of the audience.
3. Do you use the bulk **revise** upload form? Only a handful of users in the audience had tried using the bulk **revise** upload form. *[Unfortunately, it can’t do everything that it should, like correct thumbnails that don’t show. PDF files that are exported from other programs like Microsoft Word have to be saved again within an Adobe product before the thumbnails Digital Commons creates of the first page of Book Gallery pdfs will work. That makes it an extra step in the upload process of book PDFs that is necessary but also easy to forget. So unfortunately, the bulk revise upload form can’t be used for correcting thumbnails that don’t get created from the first page of a PDF, and therefore must be re-uploaded manually (one by one).]*

Summary

So let’s look carefully at our upload processes, streamline them as much as we can, and encourage bepress support to help us in that process. Whatever is user-friendly saves time and makes us have a better attitude (in this case) towards the metadata/cataloging work we do – even if we’re not catalogers. ;-)