

OA Metadata Production Workflow: Multiphase Edition



Why a Multiphase Workflow?

- Addressing the current backlog/preventing future backlog
- Providing access to content sooner
- Different phases allow catalogers to choose where they want to contribute in the metadata production process
- Each phase targets a specific group of fields

Phase



One

- Minimum Viable Record
- Select an item from the submission queue
- 3 fields to check to see if metadata is there:
 - Author (corresponding element = dc.contributor.author) OR Ordered Authors (dspace.orderedauthors)
 - Publication Date (corresponding element = dc.date.issued)
 - Title (corresponding element = dc.title)
- If there is metadata missing from the Author, Publication Date or Title fields, you will need to open the record to add the metadata.
 - The author names do not need to be verified in the lookup in Phase 1
 - Only the year in the Publication Date field is ok
- When you are finished reviewing the record update the status to “Authority Work and Publication Information Needed” if it isn’t already
- Archive it and check to see if it is at the dupe check phase

Record Versioning

- A new version of the record will be created as it moves through the workflow
- You will need to provide a reason for creating a new version
 - Standardized phrases for Phase 2:
 1. Verified or entered authority and publication metadata.
 2. Verified or entered authority metadata.
 3. Verified or entered publication metadata.
 - Standardize phrase for Phase 3:

Conducted review of metadata prior to record completion

Phase Two

- 2 subphases: Intermediate A and Intermediate B
- Starting at Phase Two the archive will need to be searched using the status
- Status applying to whole bundle is “Authority Work and Publication Information Needed”
- The metadata status may be updated to “Publication Information Needed” or “Authority Work Needed” depending on in which order the Phase 2 steps are completed in.
- Intermediate A = Authority Work
- Intermediate B = Publisher and Publisher Information
- After making edits remember to update the metadata status field with “Authority Work Needed,” “Publication Information Needed” or “Ready for Final Review” using the dropdown menu

Phase Two Fields: Authority Work

- ❑ MIT affiliations (corresponding element = dc.contributor.department)
- ❑ Authors (corresponding element = dc.contributor.author)
- ❑ Ordered authors (optional and often used in place of author field in certain workflows, corresponding element = dspace.orderedauthors)
- ❑ Sponsor (corresponding element = dc.description.sponsorship)

Phase Two Fields: Publication Information

- ❑ Journal (corresponding element = dc.relation.journal)
- ❑ Publisher (corresponding element = dc.publisher)
- ❑ Publication Date (corresponding element = dc.date.issued)
- ❑ Published DOI or URL (corresponding element = dc.relation.isversionof)
- ❑ Date Submitted for Publication (corresponding element = dc.date.submitted)
- ❑ Identifiers (corresponding elements = dc.identifier.issn, dc.identifier.isbn)

Phase Three

- When the item record has the “Ready for Final Review” status, the workflow coordinator reviews the metadata.
- During Phase 3 additional description can be added.
- Abstract field is essential
- Journal Volume, Journal Issue, Citation and Description are optional
- After reviewing the status is updated to “Complete”.

Phase 4: Remediation

