Ladybird Development Committee (LBDC) -- DRAFT

Policy and Procedures Statement: New Metadata Field Requests

Introduction:
Ladybird seeks to create a generous cataloging environment to meet the demands of new and legacy digital projects while simultaneously adhering to established metadata standards that will facilitate future technology infrastructure developments, discovery and access, and metadata sharing. New and legacy digital content requires a metadata review before ingest into Ladybird to determine if the existing metadata structure meets the needs of a project or collection, or if new fields are required to capture a full metadata record.

All Ladybird metadata must meet the minimum requirements as set forth in the Discovery Metadata for Digital Materials prior to ingest. A subset of this minimum metadata set is mandatory and subject to automated error reporting restrictions upon ingest into Ladybird.1

Although Ladybird already has a large selection of metadata fields based on MODS, legacy content and new projects may require additional fields to adequately house full descriptive, administrative or technical metadata, especially in cases where new types of content form part of a digital collection. This document describes the policy and procedures for requesting new fields to be added to Ladybird.

Policy:
The Ladybird Development Committee will accept and review requests for new fields drawn from one or more of the following metadata standards: MODS, MARC, CDWA, DCRM, EAD, TEI, Dublin Core, PBCore or similar primary metadata schemes based on content types and standards. Over time, it is expected that the Ladybird metadata structure will grow to contain a full range of metadata fields for all content types present in the Library’s collections.

Collection / Project owners should observe the following procedures when requesting new fields. The purpose of these procedures is to ensure that the collection / project owner understands the existing metadata structure, field definitions, and usage patterns at the start of their project.

Procedures for Project Owners:
New digital projects must be approved by the Digital Initiatives Advisory Board, who may review metadata issues and/or refer the project owner to CMS or other dedicated Library staff for metadata discussion and review.

Prior to submitting a request for new metadata fields, a collection / project owner should review the Discovery Metadata for Digital Materials document to understand the minimum metadata content required for every digital project.

Preliminary review of the project metadata requirements by LBDC is recommended at this stage to discuss the existing Ladybird metadata structure, the parameters of the project, and the basic steps of
cataloging procedures, including metadata spreadsheet set-up, bulk ingest procedures, default Orbis import processes (when applicable), post-ingest editing options, and item-level cataloging options.

In addition, project managers or content owners may refer to the Ladybird Libguide for further information: (http://guides.library.yale.edu/aecontent.php?pid=459822)

Next, a collection / project owner should create a metadata-mapping document for their project, including:

1. Project fields mapped to existing Ladybird fields. Every attempt should be made to use existing Ladybird fields. If you are uncertain about the use of specific fields, ask a member of LBDC for an explanation.
   a. For existing Controlled Vocabularies, such as Name (creator), subjects, culture, and genre, include examples of new terms that may be required for the authority files.

2. Project fields mapped to proposed new Ladybird fields. The new fields must be drawn from an existing standard such as MODS, MARC, CDWA, DCRM, EAD, TEI, Dublin Core, PBCore, etc.
   a. Include the field name as described in the metadata standards documentation.
   b. Include the field use as described in the metadata standards documentation.
   c. Include sample values for each new field, noting any standardized metadata formats applicable to the field.
   d. Include a note describing the rationale for the new field request. The purpose of this note is to provide information for additional review by staff in CMS and/or LBDC to consider if an existing field might serve the project’s need.

3. Submit the completed mapping document to LBDC for review and approval.

Once the new field requests have been vetted and approved, LBDC will discuss a timeframe for adding the fields to Ladybird based on the programming priority task list. However, once the new fields have been approved, project cataloging in a spreadsheet may start in expectation that the new fields will be available when the ingest process begins.

This policy and procedure applies only to developments in the Ladybird infrastructure. Discovery and access for new metadata fields in Blacklight or other discovery layers is not covered by this document.

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1 The six mandatory elements are: Title, Format, Type of Resource, Yale Location, Digital Collection, Restriction