DLF OAI Implementers Workshop
DLF Fall Forum - 11/10/05

Participants: DLF institutions committed to deeper engagement with shareable metadata and the "next-generation" services they allow. Two individuals from each institution may be accommodated: one responsible for generating and maintaining metadata (i.e., metadata librarian) and one responsible for implementing the OAI technical infrastructure of the institution.

Outcomes: Upon completing this Training Session, participants will be ready to

1)   Implement OAI metadata best practices into workflows for digital collections,

2)   Incorporate new tools for metadata management and/or manipulation and new tools for integrating new digital-collection user services, and

3)   Implement new systems and services for inter-institutional metadata sharing.

In **overview** and **instructional sessions**, participants will

- Identify the immediate and long-term benefits of OAI implementation for their institution and its learning communities,

- Recognize the benefits of more descriptive metadata formats (MODS) for resource sharing and the support of innovative scholarship, and

- Develop foundational understanding of the formats, tools, and services they will become more familiar with during the workshop sessions and potentially implement at their home institutions.

In **clinical session** *using metadata from pre-identified digital collections* and *using pre-collected information on local digital library systems, digital collections, and implementation issues*, participants will

- Discuss solutions and strategies for common metadata issues,

- Demonstrate understanding of the OAI best practices for metadata, especially the use of MODS as an exemplary format,

- Evaluate institutional plan for incorporating new OAI tools and services into local digital library system,

- Locate any remaining gaps or weaknesses in OAI implementation, and

- Identify strategies and tools for bridging implementation gaps.

Pre-Session Activities: As this will be an intensive training workshop for OAI tools and services implementation and MODS use, institutions should complete the following activities prior to attending this session:

1)   Identify those individuals who can participate in the Training Session and, following the session, provide training and guidance for colleagues,

2)   Survey the institution's progress towards OAI implementation goals, identifying current resources (tools, personnel, etc.) and perceived gaps, and

3)   Identify metadata issues relevant to implementation of OAI best practices (migration, normalization, etc.), and identify blocks of digital collection records which are representative of these issues.

If you have questions regarding this session, please direct them to Liz Milewicz (emilewi@emory.edu).

related DLF projects: document authorship:

Workshop Agenda

8:00-8:30   Arrival & Informal Introductions

8:30-9:00   Overview of the Day & the Project, Formal Introductions

Session Leaders: Martin Halbert (Emory University), David Seaman (DLF)

Description: During this segment, we will provide an overview of the workshop and the grant project, introduce ourselves, and hear from participants about their digital collections, the communities these collections serve, and issues with and aspirations for sharing metadata for these collections through OAI.

Outcomes:

1) Participants will be able to identify the immediate and long-term benefits of OAI implementation for their institution and its learning communities.

9:00-11:30   Instructional Session   [includes 15 minute break]

Session Leaders: Martin Halbert (Emory University), Sarah Shreeves (UIUC), Kat Hagedorn (University of Michigan), Tom Habing (UIUC)

Description: During this segment, we will introduce metadata manipulation and management tools, discuss best practices for shareable metadata among OAI data providers, provide a brief overview of MODS as a recommended format for providing rich descriptive metadata, preview new OAI user services that benefit from high-quality inter-institutional metadata sharing, and discuss implementation issues. One-page informational handouts supplement the instruction provided by the project team, summarizing key concepts, tools, and practices covered during the session and indicating resources for further information. At the end of this session, we will provide a brief overview of the afternoon Clinical Session.

Outcomes:

1) Participants will recognize the benefits of more descriptive metadata formats (MODS) for resource sharing and the support of innovative scholarship.

2) Participants will develop foundational understanding of the formats, tools, and services they will become familiar with during the clinical session and potentially implement at their home institutions.

11:30-1:00   Lunch

1:00-3:15   Clinical Session   [includes 15 minute break]

Session Leaders: Martin Halbert (Emory University), Sarah Shreeves (UIUC), Kat Hagedorn (University of Michigan), Tom Habing (UIUC)

Description: During this segment, we will address common OAI implementation issues, including managing and migrating metadata, using richer metadata formats, integrating new digital-collection user services, and bridging infrastructure gaps. Participants' local collections and issues will guide instruction.

Outcomes:

1) Participants with responsibility for metadata will become familiar with solutions and strategies for metadata issues, new OAI tools and services for migrating or manipulating metadata, and OAI best practices for metadata, especially the use of MODS as an exemplary format.

2) Depending on their stage of OAI implementation, participants with responsibility for OAI technical infrastructure will identify strategies and tools for bridging implementation gaps, and draft institutional plan for incorporating new OAI tools and services into local digital library system.

3:15-3:30   Summary

Session Leaders: Martin Halbert (Emory University) and session leaders

Description: Informal follow-up discussion on remaining questions not covered in previous segments.

Supplemental Handouts:

Following are descriptions of documents used during this training session.

OVERVIEW	INSTRUCTIONAL SESSION
1. Project Abstract Summary of the DLF IMLS OAI Best Practices project, including project goals. **2. Case for OAI** Background of the OAI protocol's development, why it's needed, and who benefits from its implementation.	**1. OAI "Cheat Sheet": A Taxonomy of Rapid OAI Deployment Strategies** Types of digital library infrastructures and strategies for deploying OAI on top of them. Offers comparison with own institutional structure and how it might be. **2. Summary of OAI Metadata Best Practices** Common metadata formats and their use with the OAI protocol, focusing on quality issues and guidelines for improving shareable metadata. **3. Summary of the DLF Aquifer MODS Profile** Recommendations for implementing MODS with cultural heritage materials, as an example of a more descriptive format for metadata sharing. **4. OAI Tools** Technology for implementing OAI, from scripts to systems. Addresses three main tool categories in metadata sharing process: data providers, digital library systems w/ OAI capabilities, and harvesters. **5. OAI Administrative Planning** Aspects to consider when allocating resources for OAI implementation, including personnel, technology, monetary costs, and time.