Making Your Content Available in the "Catholic Portal"

This is an outline – a recipe – for getting your metadata records into the "Catholic Portal."

1. **Identify specialists**. It takes many people with many skills to extract content for the Portal. It requires bibliographers (subject specialists) who know which materials located in your local institution fit the scope of the project. It requires catalogers (metadata specialists) who know how the local materials are described. It requires systems librarians (database administrators) who can extract metadata records from the underlying system(s).

2. **Have a meeting**. Bring together all the specialists from Step #1 and discuss Steps #3 through #10.

3. **Understand the scope of the Portal**. This is akin to understanding the purpose of the Portal, who is its intended audience, and what is its collection policy. In short, the Portal is intended to contain rare, unique, and/or uncommon materials, in all formats, useful for scholarly Catholic research.

4. **Identify your resources and collections**. List the resources and collections in your institution which fall into the scope of the Portal. Examples might include manuscripts, rare books, digitized images, sound recordings, the papers of famous individuals, the archives of leading organizations, pamphlets, newspapers, etc. This work will probably be led by bibliographers.

5. **Articulate how your resources and collections are described**. For each of your resources and collections identified in Step #4, determine which ones have metadata and which ones don't. For those items which *do* have metadata, how they are denoted in your various computer systems? Are they all in a particular call number range? Do they comprise the totality of items in your "special collections" department? Are they all of the things encoded as EAD files? Do they all have some specific local note in your library catalog? Are they all saved in a particular local spreadsheet or database? etc. This work will likely be led by catalogers.

6. **Flag records as "CRRA."** Once you have identified records appropriate for inclusion in the Portal, specifically denote them as such. For example, if your records are in MARC, then insert something like "crra" into a local note such as 590 subfield a. If your records are EAD files, you may want to insert "crra" into the <notestmt> within the <filedesc> element. This may be the work of both catalogers and systems librarians.

7. **Validate records.** Each and every record destined for the Portal *must* have three metadata characteristics. First, they must have a *unique identifier.* For MARC records this is the 001 field. For EAD files, this is a <unitid> element inside the <did> element. These unique identifiers are used by the Portal software as database keys.

   Second, each record must have some sort of *descriptive title* element. For MARC records this is usually 245 subfield a. For EAD files this is usually the <unititle> element inside the <did> element. These descriptive title elements provide a means for searching and put the

object in context for the patron.

Finally, every record must include some sort of *location code or address* pointing to the described object. For MARC records, this is often a call number in 099 or a URL in 856. For EAD files, this may be anything from a <note> denoting the postal address of your institution placed in the <did> element to URLs inserted into <extref> elements within <physloc> elements inside <did> elements. This may be the work of both catalogers and systems librarians.

Please refer to the "CRRA Metadata Guidelines" for further guidance on requirements and best practices for maximizing the discoverability of your metadata records in the Portal.

8. **Extract metadata records**. Run a report against your computer system searching for all the records denoted by Step #6. Save the output to one or more files on a Web server, and tell us at Notre Dame the resulting URL. This process makes your metadata available for harvesting. For example, if your metadata records are in MARC, then query your integrated library system for "crra" in field 590 subfield a, and save the result as a single file of MARC records to an HTTP file system. If your metadata is stored as EAD, then find all the Portal-related EAD files and save them in a Web-accessible directory. In both cases, make sure your exported data is character encoded as UTF-8 and not MARC-8. This is the work of systems librarians.

9. **Create a workflow.** To ensure your records are continually added to the Portal it is necessary to repeat this process on a regular basis. For example, as new items are selected or come into your institution, bibliographers will need to immediately denote items destined for the Portal. You may do this by adding a special note to the acquisitions record. As the acquisitions are completed, the cataloger will need to immediately update the record(s) with "crra" flags. The systems librarian will need to extract the metadata on a regular basis and may consider writing a script that runs every night at midnight.

10. **Repeat.** This sort of work is never done. Go to Step #3 about twice a year, and go to Step #1 about once a year.

Finally, this "recipe," like any good recipe, is only an outline of what needs to be done. There will surely be variations along the way, but based on our experience, this outline represents a good way to get started.

CONTACT INFORMATION
If you have questions along the way, don't hesitate to contact Eric or Pat:
Eric Lease Morgan emorgan@nd.edu 574.631.8604
Pat Lawton plawton@nd.edu 574.631.1324