Summary Report

CESSDA Metadata Management
Midterm Review

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The full report was issued on 07.09.2016 as first periodic report of the work plan task. The present summary report was published in January 2017.
Abstract

The CMM project is progressing well. We are on track to meeting our commitments. Task 2 has been completed. The report D1&2 on SPs’ metadata practices was published in June. We have established a CMM feedback group consisting of interested data archive representatives. The project has been presented to a wider community at the EDDI 2015 and at the IASSIST 2016.

Tasks 3 (Core Metadata) and 4 (Controlled Vocabularies) are progressing, the deliverables (Portfolio part A and B) are due in the second half of the project. Google spreadsheets are used as a tool so that all project partners have access to the working documents. In the core model work, good progress was made in a face-to-face sidemeeting during the IASSIST conference. Outputs from previous projects like DwB and DASISH are used as a basis for work. We are also giving continuous feedback to the DDICV group and have established contacts to DDI Moving Forward project.

Task 5 (Impact Analysis) has not started yet but will begin as planned during autumn 2016.

Introduction

This is the midterm report for the CESSDA Metadata Management Work Plan Task 2015 project. The key objective of this Work Plan Task is to develop, promote and implement a standardised metadata design, content and practice for all CESSDA data assets. The result will be the CESSDA Metadata Standards Portfolio Version 1 that will become the standard for all Service Providers. It will encompass support for resource discovery, question banks and preservation and help all Service Providers achieve the DSA certification requirements related to metadata issues.

The project partners are: FSD (lead), ADP, CASD, DDA, GESIS, NSD, SND and UKDS. The work consists of five Tasks. They and the task leaders are:

- Task 1. Management and Promotion (FSD)
- Task 2. Service Providers’ current metadata practices and metadata needs (FSD)
- Task 3. Core Metadata Model(GESIS)
- Task 4. Controlled vocabularies portfolio (UKDS)
- Task 5. Impact analysis and user experience (ADP)

The project was presented at the CESSDA Service Providers’ Forum in Bucharest in November 2015 and first results were presented at the SPF in Bergen in May 2016. The CMM project was also presented to a wider community at the EDDI conference in Copenhagen in December 2015 and at the IASSIST conference in Bergen in May 2016.

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The kickoff face-to-face meeting took place after EDDI in Copenhagen and was attended by all project partners. We also took the opportunity to have a face-to-face meeting focusing on the Core Metadata Model in conjunction to the IASSIST conference in Bergen (which many partners were attending anyway). This meeting was attended by FSD, DDA, GESIS, NSD and SND and hosted by NSD. The project has held seven online meetings, where all partners have been invited to, and several smaller online working meetings. Meeting minutes are available at Basecamp. Collaborative working documents are held in Google Drive.

The bulk of the work to date has been undertaken by the lead partner (FSD) and the leaders of Task 3 (GESIS) and Task 4 (UKDS).

<table>
<thead>
<tr>
<th>KPI</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Functionality</td>
</tr>
<tr>
<td>2</td>
<td>Capacity</td>
</tr>
<tr>
<td>3</td>
<td>User experience</td>
</tr>
<tr>
<td>4</td>
<td>Impact on CESSDA and SPs</td>
</tr>
</tbody>
</table>

**Functionality**

The Portfolio will enable CESSDA’s data assets to be discoverable and comprehensible. The aim is to create a DDI Lifecycle profile that could become the standard for all SPs. The Portfolio will encompass resource discovery, question bank and preservation as well as multilinguality. A first step towards accomplishing the KPI1 was charting the basis for work, i.e. D1&2, that was completed in spring and published in June 2016. Tasks 3 (Core Metadata Model) and 4 (CVs) have contributed to the KPI1 – we have created a spreadsheet list of metadata elements and elements where CVs are needed have been selected. There are dependencies with other CESSDA Work Plan Task projects that have not started yet (mainly EQB and Catalogue projects) and these will have to be explored in the second half of the project.

**Capacity**

The Portfolio will enable CESSDA’s data assets to be discoverable and comprehensible. The aim is to create a DDI Lifecycle profile that could become the standard for all SPs. The Portfolio will encompass resource discovery, question bank and preservation as well as multilinguality. A first step towards accomplishing the KPI1 was charting the basis for work, i.e. D1&2, that was completed in spring and published in June 2016. Tasks 3 (Core Metadata Model) and 4 (CVs) have contributed to the KPI1 – we have created a spreadsheet list of metadata elements and elements where CVs are needed have been selected. There are dependencies with other CESSDA Work Plan Task projects that have not started yet (mainly EQB and Catalogue projects) and these will have to be explored in the second half of the project.

**User experience**

KPI3 states that the producer and archive experience should be fully supported. CMM project will, as far as possible and necessary, produce definitions of the metadata elements as well as examples of their use. Tasks 3 and 4 are the main contributors here and this work is progressing. A User guide is included in our Phase 2 proposal.
**Impact**

The Impact analysis (Task 5) contributes to the KPI4. It is the responsibility of Task 5 that has not started yet. It will start as planned in the second half of the project in autumn 2016.