# Samvera Metadata Interest Group Meeting

## Community Notes

**Time:** 2:00pm-3:00pm Eastern; 4th Tuesday of the month

**Call-In Info:**
https://osu.zoom.us/j/92616270540?pwd=VzN6bEVlR3NGbjZDdFNueWpRUVMvQT09

**Community Notes:**
**https://docs.google.com/document/d/1iaH6zpXc32K3Llz9uKp8DYN-wqzEo9A6kfHtt4xmpx8/edit?usp=sharing**

# DATE

**Moderator(s)**:

**Notetaker**:

**Attendees:**

**Agenda:**

# 2024-10-22

**Moderator(s)**:

**Notetaker**:

**Attendees:**

**Agenda:**

- (BMR) RE: lack of language tags for text fields in Samvera Hyrax - there is an open issue for this!
- Documentation github
  - https://github.com/orgs/samvera/projects/33/views/2
- Regional meetings takeaways

# 2024-09-24

**Moderator(s)**: Annamarie Klose

**Notetaker**: Anna Goslen

**Attendees:**

- Julie Hardesty, Indiana University
- Benjamin Riesenberg, University of Oregon
- Anna Goslen, UNC Chapel Hill
- Annamarie Klose, The Ohio State University Libraries
- Steve McDonald, Tufts University
- Rachel Jacobson, Georgetown University
- Margaret Kibi, UC Santa Barbara
- Morgan McKeehan (she/her/hers), Oregon State University Libraries & Press
- Meg D'Elia, Georgetown University
- Emma Beck, University of Louisville (she/her)

**Agenda:**

- Samvera updates
  - Regional meetings
    - Midwest Regional Meeting (9/25-9/26): https://samvera.atlassian.net/wiki/spaces/samvera/pages/2529820674/Samvera+Midwest+Regional+Meeting+2024
    - Other regional meetings: https://samvera.atlassian.net/wiki/spaces/samvera/pages/405212311/Samvera+Regional+Meetings
    - Can still sign up!
  - Documentation group
    - There is a Samvera Documentation Interest Group that has started meeting
      - https://samvera.atlassian.net/wiki/spaces/samvera/pages/2579431452/Documentation+Interest+Group
    - The docs group has a GitHub project board for identifying outdated docs for doc sprints
      - https://github.com/orgs/samvera/projects/33
- Steve McDonald demo on local Samvera ingest packages @ Tufts
  - Demo was recorded
  - Repo run jointly by Archives Dept and the Library will full time developers
  - Archives staff use it for archival materials such as records, memorabilia. Theses are under their administration but have Library do cataloging and subject analysis
  - Library ingests other non-archival materials such as scholarly research from faculty and students. Licensed materially hosted locally.

- For scholarly materials, ask contributors to fill out spreadsheet with metadata
- Toolkit converts to XML for ingest
- Also get materials through the Springer OA process. Springer sends out zip file.
- Get theses from Proquest
- Toolkit creates "processed" directory that is ready to ingest
- In repo dashboard, add xml then add files; batch begins processing. Can then preview items and publish
- Q: Do you initially ingest metadata, then the files? Yes
- Q: Is this an alternative to Bulkrax? Does Tufts use Bulkrax? No, Tufts doesn't use Bulkrax
- At Tufts, their Hyrax can ingest and export XML
- IU is importing content in METS XML for the purposes of migrating content from another system
- Many of us with Hyrax/Hyku systems are using CSV for import
- Alt-text in our repositories
  - Samvera movement toward 2.0 accessibility? 2026 compliance of 2.1?
    - Department of Justice requirements for public institutions
      - https://www.ada.gov/resources/2024-03-08-web-rule/
      - IU - system-wide they've implemented Siteimprove. Generates reports.
      - Alt-text: using title of the work for alt-text on items in search results. Believe this is part of Hyrax core. Is this good enough?
      - What does it mean to provide alternative text through IIIF viewer?
      - Often have many images per work, so need to be able to provide alt-text on file-level
        - Ex: https://library.osu.edu/dc/concern/generic_works/gb19fk54k
      - Emma: use title of the work plus source identifier because titles may not be unique.
      - Margaret: IPTC has two properties available for alt-text, Iptc4xmpCore:AltTextAccessibility and Iptc4xmpCore:ExtDescrAccessibility
        - https://iptc.org/std/photometadata/specification/IPTC-PhotoMetadata#alt-text-accessibility
      - Emma: Institutionally, are folks getting buy in?
        - Julie: Institutionally being told that what we're putting online needs to be accessible. Staffing and resources still an issue.
      - Q: does IIIF have a way to handle alt-text?
        - Possible - but would depend on viewer support. It's feasible to add properties, but need viewers to support it

- - - (manifest can take in descriptive alternative text but the viewers don't necessarily do anything with it or don't use it the same way)
  - Open discussion
    - (BMR) RE: lack of language tags for text fields in Samvera Hyrax - there is [an open issue](#) for this!
      - We will return to this topic next month

Next meeting October 22nd (who will be at DLF) - Tentative? - will follow-up

# 2024-08-27

**Moderator(s)**: Annamarie Klose

**Notetaker**: Emma Beck

**Attendees**:

- Annamarie Klose, Ohio State University
- Emma Beck, University of Louisville
- Anna Goslen, UNC-Chapel Hill
- Heather Greer Klein, Samvera
- Benjamin Riesenberg, University of Oregon
- Steve McDonald, Tufts University
- Cara Key, Oregon State University
- Meredith Hale, University of Tennessee, Knoxville
- Christine Peterson, Amigos Library Services
- Morgan McKeehan (she/her/hers), Oregon State University Libraries & Press
- Rachel Jacobson (she/her/hers), Georgetown University
- Julie Hardesty (Indiana University)

**Agenda:**

- Samvera Data Models (from Slack)

- ○ Oregon (?) data model example - 🔴 Hydra::Works PCDM Diagram
- ○ Does anyone have or would be willing to get a RDF dump? Benjamin Riesenberg (briesenb@uoregon.edu) from University of Oregon would like to use it to investigate
- ○ If it's fedora 4 its PCDM (Hyrax 3 is fedora 4)
- ● Ordering of compound objects
  - ○ Can't remember the context this came up in, seems to be a bit of across the board issue for people in various contexts. OSU and UofL both have had this issue
  - ○ UNC has ordered their authors with hierarchy
    - ■ More historical info about metadata ordering in the community:https://samvera.atlassian.net/wiki/spaces/samvera/pages/408728826/Hyrax+Metadata+Ordering+Working+Group
    - ■ Presentation that has some more information about UNC's people objects:https://cdr.lib.unc.edu/concern/scholarly_works/c247dx287 - AG also happy to put folks in touch with UNC developers for technical questions
  - ○ Emma/Anna cannot remember the context of this question so will move on. If someone remembers how this came up, let us know and we will add it to the agenda again
  - ○ Link shared by AK in chat: https://github.com/samvera/hyrax/issues/4781
  - ○ Might be more about sorting
- ● Broken up source field (Georgetown from Slack)
  - ○ Georgetown developer fixed it!
  - ○ Ended up being a Solr problem
  - ○ "The solution to our Source issue was: we had to make the field sortable ("sim") within Blacklight, indicated that it should be "facetable" in an additional file, BasicMetadataIndexer, and then reindex"
- ● Changed title in collection, and then the collection would not show up in the filtering
  - ○ Some others have had similar but not quite exact issues, seems like Solar/Hyrax/Hyku is almost remembering the previous system but not quite
  - ○ The solution thus far has been to completely delete and re-upload the content
- ● Vendor packages questions - Tufts
  - ○ Ingesting content
- ● Roadmaps alignment group update
  - ○ Representatives from various samvera products
  - ○ Technology community report should be out before the end of the calendar year that would discuss various developments in the community
  - ○ How do we support various developments going on in the community. Avalon is kinda doing its own thing. Hyrax and Hyku are a bit more community based. The newest release of Hyku 6 should have allinson flex, which would make it possible in Hyrax
- ● AllinsonFlex
  - ○ 🎥 SMIG_2023-06-27_Hardesty_Bulkrax-and-AllinsonFlex-Demo.mp4

- In the next few weeks it should be in Hyku and we should be able to see it there
- Allows people to design a set of fields with a context that can be assigned to an admin set or specific fields
- Amigos has headed up some work with British LIbraries and PALS with the goals of:
    - UI for editing/creating metadata
    - Optional ability to make updates with upload of YAML file will be retained
    - Ability to create and update new work types and metadata profiles
    - Create fields or edit/update field names
    - Ability to determine which fields are required
    - Contexts, a preset of metadata fields related to a specific repository or source, attached to an
    - M3 (Machine-readable Metadata Modeling) metadata specification
        - https://github.com/samvera-labs/houndstooth/blob/main/examples/hyrax_3_0.yaml
- We're still working through what this will exactly look like, but it has a lot of possibilities
- UI is able to see more than 10 facets in the more dialog which sounds like not a default

Next meeting September 24th

# 2024-06-25

**Moderator(s)**: Annamarie Klose

**Notetaker**: Anna Goslen

**Attendees**:

- Julie Hardesty (Indiana University)
- Annamarie Klose (OSU)
- Rachel Howard (University of Louisville)
- Anna Goslen (UNC Chapel Hill)
- Christine Peterson (Amigos Library Services)
- Heather Greer Klein (Samvera)

**Agenda:**

- Roadmaps Alignment Group Update
    - Julie: Working on community technology report for Samvera. Aiming for the end of June
- Thumbnails in Hyku/Hyrax. Creating an issue to submit for improvement.

- ○ Discussion from last time: https://samvera.atlassian.net/wiki/spaces/samvera/pages/2454945998/Metadata+Call+2024-05-28
- ○ Check if Nurax has any thumbnail options? Standard option is, if there are multiple images for a work, you can select which image you'd like for thumbnail. But can't upload separate, custom thumbnail
- ○ Are we feeling ready to create and submit an issue for this?
- ○ Just thumbnails for works? Or also collections?
- ○ Use cases:
  - ■ Metadata only records with custom thumbnails: Provide access (via URL) to a publisher copy of a book or article that the library is barred from adding to their IR. The publisher may have restrictive rights, and/or the faculty member might be uncomfortable providing anything but the published version.
  - ■ Metadata only records with custom thumbnails: Some faculty keep their websites and prefer a single access point from there. I don't know if this is a significant number at this point, though. It used to be more prevalent than it probably is now.
  - ■ Rights issues: Provide a custom logo, e.g. lock symbol, for restricted content as a reminder that works require authentication for access. Currently, public records with all restricted files appear defective. This is confusing for users.
  - ■ Rights issues: Override the IIIF Viewer when a smaller image or thumbnail - rather than full image in IIIF Viewer - is needed for sharing limited access to works with rights issues. This is also the Atla Digital Library approach.
  - ■ Sensitivity issues - block specific content.
- ○ Julie: this could be an iterative process. Start off with something like - work with no image, metadata only, or restricted content, and would like to be able to set a custom thumbnail. Could then revisit and iterate on functionality, to add ability to do things like have a lock thumbnail in certain scenarios. New work/feature requests might take awhile to get to.
- ○ Julie: things like collection thumbnails, banners stored separately in db from repo-managed content files. These might be treated similarly to the way collection banners, etc. are handled.
- ○ For our reference and help answering future questions about what we're thinking re: this feature
  - ■ How this is done in CONTENTdm: https://help.oclc.org/Metadata_Services/CONTENTdm/Project_Client/Add_items_and_objects/Generate_thumbnails
  - ■ How this is done in DSpace: https://stackoverflow.com/questions/58035491/how-to-manually-upload-thumbnails-to-dspace
- ○ Heather: I bet other institutions would be interested in this as well. We could shop the idea around with others and perhaps get some focus on it re: development.
- ○ Adding custom thumbnails to Works - https://github.com/samvera/hyrax/issues/6848
- ● Allinson Flex Development Update
  - ○ Christine: SoftServ upgrading Hyrax and will be updating Hyku as well. Need to work on the UI that lets you upload a YAML file and make changes. Will need to

go through Hyrax approval process. Would this get included in Core Hyrax or be a gem? Julie: would be nice if it ended up on nurax and we could review and test.
- Open Discussion

Next Meeting: July 23rd, 2-3 Eastern

# 2024-05-28

**Moderator(s)**: Annamarie Klose

**Notetaker**: Emma Beck

**Attendees**:

- Christine Peterson (Amigos)
- Annamarie Klose (Ohio State University)
- Jon Cameron (Indiana University)
- Emma Beck (University of Louisville)
- Julie Hardesty (Indiana University)

**Agenda:**

- Avalon - Adding Avalon features to Valkyrie Hyrax is possible. However, it's probably not anytime soon.
- Roadmaps Alignment Group Update
  - Community Report, finish up at end of june
- Allinson Flex - some work in Hyku being done, what are some goals in the larger Samvera community about it
  - Survey went out to Hyku users on ways to improve and what is wanted
  - Based on Hyku 6, have heard its not a good fit for Hyrax
  - Amigos is doing some work on this
  - Valkyrie compatible
  - Some want to be able to use the YAML file and the UI
  - Having customizable metadata is an important selling point for possible adopters
- Follow-up on discussion led by Christine Peterson about creating an issue to provide custom thumbnails in Hyrax and Hyku.
  - Metadata only records with custom thumbnails: Provide access (via URL) to a publisher copy of a book or article that the library is barred from adding to their IR. The publisher may have restrictive rights, and/or the faculty member might be uncomfortable providing anything but the published version.
  - Metadata only records with custom thumbnails: Some faculty keep their websites and prefer a single access point from there. I don't know if this is a significant number at this point, though. It used to be more prevalent than it probably is now.
  - Rights issues: Provide a custom logo, e.g. lock symbol, for restricted content as a reminder that works require authentication for access. Currently, public records with all restricted files appear defective. This is confusing for users.

- - Rights issues: Override the IIIF Viewer when a smaller image or thumbnail - rather than full image in IIIF Viewer - is needed for sharing limited access to works with rights issues. This is also the Atla Digital Library approach.
    - PALNI uploads metadata only with an image, and then deletes the image and the metadata stays
    - If image is private, no thumbnail is shown, so it looks like a problem even if its not
      - [https://library.osu.edu/dc/concern/generic_works/m326mg30k](https://library.osu.edu/dc/concern/generic_works/m326mg30k)
    - Typically a work issue, but can also be a collection example
    - Some Hyku versions can choose the collection file or upload a separate image.
    - Hyrax versions are working differently, some let you choose from all works in a collection, some only let you choose a handful
    - Is this mostly a work or collection issue?
    - Issue about collection-level thumbnail:
      - [https://github.com/samvera/hyrax/issues/3319](https://github.com/samvera/hyrax/issues/3319)
      - [https://github.com/samvera/hyrax/issues/4973](https://github.com/samvera/hyrax/issues/4973)
      - [https://github.com/samvera/hyrax/issues/4970](https://github.com/samvera/hyrax/issues/4970)
    - Not sure we know yet about what exactly we need for the work level development
    - Nurax - [https://dev.nurax.samvera.org/](https://dev.nurax.samvera.org/)
    - Parent collections with child collections - no works to select for thumbnail on parent collection; have to add a work on parent collection to be able to set a thumbnail, then either have out of place work in parent collection or sometimes you can remove that work from the collection and the thumbnail stays in place (might be a bug?)
    - Avalon is a little different, trying to figure out how display something for transcript
    -
- Open discussion
  - Heather is at open repositories next month. Has 7 minutes to highlight the Samvera community
  - Regional meetings are coming along, about to announce the west coast one. Maybe State of Samvera after the 3 meetings
  - Smaller Samvera presence at DLF

Next Meeting: June 25th, 2-3 Eastern

# 2024-04-23

**Moderator(s)**: Annamarie Klose

**Notetaker**: Emma Beck

**Attendees**:

- Annamarie Klose (Ohio State University)
- Julie Hardesty (Indiana University)
- Anna Goslen (UNC Chapel Hill)
- Christine Peterson (Amigos)
- Heather Greer Klein (Samvera)
- Cara Key (Oregon State University)

- Emma Beck (University of Louisville)
- Kim Kelmor (GU Law Library)
- Nora Zimmerman (Lafayette)

**Agenda:**

- Roadmaps Alignment Group Update
  - Working on whitepaper that is update on state of Samvera technology
  - Met, should be an update soon
- Samvera updates
  - [Virtual Samvera Connect](#) coming up May 7th & 8th - on Youtube and recorded
  - [Developer congress](#) May 13th - 17th
  - Jeremy Friesen is leaving, losing another board members
  - Seeking 2 board members
  - Explaining partnerships and hoping to recruit more Samvera partners
- Samvera is an international community. How do we support internationalization and different languages in our Samvera platforms in terms of metadata and other displayed content? Or do we not support other languages / internationalization?
  - Lafayette has metadata encoded in UTF-8 and a language tag in some fields
    - https://github.com/LafayetteCollegeLibraries/spot/blob/primary/app/forms/concerns/language_tagged_form_fields.rb#L92-L105
    - converts the values to RDF literals and assigns the language tag where present
  - Current international hyrax issues that need fixing
    - https://github.com/samvera/hyrax/issues?q=is%3Aopen+is%3Aissue+label%3Ainternationalization
- Permissions
  - Georgetown tenant seeking information on the permissions not carrying over when adding a user
- Documentation leaves a lot to be desired in Samvera
- Custom thumbnails in Hyrax and Hyku
- Looking to create custom fields and hide metadata fields? What's required/not required in a field?
  - Is this AllinsonFlex - contexts which are connected to admin sets
  - IU Demo - https://drive.google.com/file/d/1j8LlrHISclbv7gYYOtpr93op_iGqBVj3/view
  - Minutes from that meeting - https://samvera.atlassian.net/wiki/spaces/samvera/pages/2199355393/Metadata+Call+2023-06-27
- ~~Follow-up on last month's discussion led by Christine Peterson about creating an issue to provide custom thumbnails in Hyrax and Hyku.~~
- Open Discussion
- Upcoming events: [Samvera Virtual Connect 2024 - May 7-8](#)

**Next meeting:** May 28, 2024, 2-3 pm Eastern

# 2024-03-26

**Moderator(s)**: Annamarie

**Notetaker**: Emma

**Attendees**:

- Annamarie Klose, Ohio State University
- Meredith Hale, University of Tennessee, Knoxville
- Emma Beck, University of Louisville
- Cara Key, Oregon State University
- Julie Hardesty, Indiana University
- Anna Goslen, UNC-Chapel Hill
- Christine Peterson, Amigos Library Services

**Agenda:**

- Lingering thoughts from the roundtable
    - Julie: Hyrax Maintenance Working Group discussing using a crawler, browser stack
- Update on the roadmaps group - haven't met for a bit
- COUNTER compliant stats - question from Christine on slack
  ([https://samvera.slack.com/archives/C0X9STKSP/p1707951845799949](https://samvera.slack.com/archives/C0X9STKSP/p1707951845799949))
    - Pitt is having that development done in Hyku
    - Couple of libraries have asked about that
    - [https://cop5.projectcounter.org/en/5.1/index.html](https://cop5.projectcounter.org/en/5.1/index.html)
    - Standard for gathering statistics, not quite the same detail as a report generator
    - Google analytics will be the next push to get working again
- Multi-tenant work types - Rachel's question on slack
  ([https://samvera.slack.com/archives/C0X9STKSP/p1707237376440269](https://samvera.slack.com/archives/C0X9STKSP/p1707237376440269))
    - Hyku based question
    - If run on the same server, all the tenants currently need to have the same work-types
    - Some development
- Location field and geo names - Anna Goslen's question on slack
  ([https://samvera.slack.com/archives/C0X9STKSP/p1706219727688909](https://samvera.slack.com/archives/C0X9STKSP/p1706219727688909))
    - [https://github.com/cu-library/cuirator/blob/8d35708bc323664e0172fd30df20e8df25126438/config/initializers/qa.rb#L4](https://github.com/cu-library/cuirator/blob/8d35708bc323664e0172fd30df20e8df25126438/config/initializers/qa.rb#L4)
    - Ways to help users select the right term and disambiguate
    - One possibility, after a user selects the term having a link follow up so users can identify

- - - Unsure of if this a Geo names or a Hyrax issue
    - QA is in development for Hyku via U.Tennessee
  - Bulkrax and custom thumbnails - Christine
    - Institution importing into DPLA and they want a link in a field
    - OSU has added it to a line to their OAI feed
    - Looking to do metadata only fields and how to have a unique thumbnail
    - Christine is going to write it up and give some use cases so we can see it better
    - PALS might have dealt with it before
  - Open discussion
    - Samvera virtual connect proposal deadline has been extended to April 1
      - [https://docs.google.com/forms/d/e/1FAIpQLSdCSzObS-b37Ukv5jUTm7ha U1LEB8Fnxsfzw5T1TSHVoTZd5Q/viewform](https://docs.google.com/forms/d/e/1FAIpQLSdCSzObS-b37Ukv5jUTm7haU1LEB8Fnxsfzw5T1TSHVoTZd5Q/viewform)

**Next meeting:** April 23rd 2-3 PM EST

# 2024-01-23

**Moderator(s)**: Annamarie

**Notetaker**: Emma

**Attendees**:

- Julie Hardesty (Indiana University)
- Emma Beck (University of Louisville)
- Cara Key (Oregon State University)
- Anna Goslen (University of North Carolina at Chapel Hill)
- Annamarie Klose (Ohio State University)
- Maggie Dickson (Duke University)
- Heather Greer Klein

**Agenda:**

- Welcome and introductions, including overview of the group
  - Mostly returning faces (always welcoming to new faces too)
  - Last year did a lot of work on OAI-PMH to create recommendations
  - Welcoming discussion for the community. Feel free to chime-in if there are any things people wish to be discussed
- Roadmaps Alignment Group update
  - Not many updates. Haven't met since Dec
  - Working to get valkarized Hyrax in Fedora 6
  - Samvera contracted Softserv to do the other piece. Migration path from Fedora 4 to fedora 6 or postgres

- - - This includes the migration of files
    - Meeting this week
- Dev Congress - Julie is attending. Will loop us in if there is anything relevant
- Sorting - not something we're all going to agree on, but maybe something more configurable
    - https://github.com/samvera/hyrax/issues/4308
    - https://github.com/samvera/hyrax/issues/3558
- Heather giving talk at CNI (similar to the one at DLF) and will share the recording once it's available
- Question: How do institutions store/display ORCIDs (https://orcid.org/) and RORs (https://ror.org/) in their Hyrax repositories? While there is a Hyrax-ORCID gem (https://github.com/samvera-labs/hyrax-orcid), there may be other integrations in the community on interest to this group.
    - Trying to make sure Hyrax repository matches DataCite. How to model and store the information
    - ORCID gem is a real integration (was developed for Hyku originally), just looking into where the ORCID/ROR is being stored in data fields
        - University of Cincinnati is maybe using it. University of Virginia might have something
        - UNC is storing it in nested person records. Interested in setting up RORs in questioning authority
        - Oregon State would like to do something similar at some point
    - Where are persistent identifiers stored - ORCID & DOI which was maybe done on Hyku?
        - https://github.com/samvera-labs/hyrax-doi
    - Something to think about is the Valkarized options and the back end options. Possible future options for additional hierarchy
- Discuss February's Accessibility Roundtable
    - Julie and Anna will present
    - Still looking for additional presenters
- Open Discussion

**Next meeting:** February 27, 2024, 2-3 pm Eastern