

UNDERSTANDING AND IMPLEMENTING METS

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Abstract – This half day tutorial will provide participants with an introduction to the Metadata Encoding and Transmission Standard (METS) and the METS Primer [1]. It will give a short basic overview of the standard and thoroughly explore different models of implementation using two different use cases. The METS schema is a standard for encoding descriptive, administrative, and structural metadata regarding objects within digital libraries as well as digital archives, expressed using the XML schema language of the World Wide Web Consortium. It is maintained by the METS Board and the METS Maintenance Activity is managed by the Library of Congress [2].

Keywords – Metadata and information strategies and workflows; Infrastructure, systems, and tools; Case studies, best practices and novel challenges; Training and education

Conference Topics – 2. Designing and Delivering Sustainable Digital Preservation; 5. The Cutting Edge: Technical Infrastructure and Implementation

I. INTRODUCTION

The METS Primer describes the metadata and information being stored or transferred in a METS document. METS provides a key piece of infrastructure for digital transfer as well as digital preservation activities, playing a vital role in enabling the effective management, discovery, and re-usability of digital information. METS metadata provides for descriptive information, administrative information, and structural information about digital objects. By

working in conjunction with other standards, METS gives information regarding documents preservation activity, identifies technical features, and aids in verifying the authenticity of digital objects. METS contains a set of metadata elements recommended for use in all transfer as well as archiving situations regardless of the type of materials being transferred or archived, the type of institution, and the transfer strategies employed.

II. SUMMARY OF TUTORIAL

The Making of America II project (MOA2) [3] originally attempted to address the issues of digital object metadata in part by providing an encoding format for descriptive, administrative, and structural metadata for textual and image-based works. METS, originally a Digital Library Federation initiative, built upon the work of MOA2 and provided an XML document format for encoding metadata necessary for both management of digital objects within a repository and exchange of such objects between repositories (or between repositories and their users). Depending on its use, a METS document could be used in the role of Submission Information Package (SIP), Archival Information Package (AIP), or Dissemination Information Package (DIP) within the Open Archival Information System (OAIS) Reference Model.

We have seen a growing call for the METS Board to undertake tutorials, such as this, as more and more organizations come to grips with digital transfer and

digital preservation. This tutorial introduces METS and its elements and gives an introduction to the elements in the Primer.

In addition, and with focus of the tutorial, it presents two examples of using METS metadata and a discussion of implementation considerations made in these two use cases. The tutorial will also show how to use METS in combination with the “Preservation Metadata: Implementation Strategies” (PREMIS) [4] standard. It will with these two uses cases show examples of implementation experiences through the institutional experience of the tutors.

The tutorial aims at developing and spreading awareness and knowledge about metadata to support the transfer and long-term preservation of digital objects.

III. CONTENT OUTLINE

The draft outline for the tutorial is outlined below.

- A. *Introduction to METS*
 - Background (brief history and rationale of METS)
 - Benefits of implementing METS
- B. *METS in detail*
 - Core elements
 - Simple example to build familiarity
- C. *Implementation*
 - METS Profile
 - Case studies
 - The case of using PREMIS in METS
 - Support and the METS community
 - Conformance
- D. *Next Steps*
 - Round table discussion for institutional plans
- E. *Wrap up*

IV. INTENDED AUDIENCE

The tutorial will benefit individuals and institutions interested in implementing METS for transfer as well as for the long-term management and preservation of their digital information but who have limited experience in implementation. Potential audience includes cultural heritage operators, researchers and technology developers, professional educators, and others involved in management and preservation of digital resources.

V. EXPECTED LEARNING OUTCOMES

- A. *Participants will understand:*
 - What METS is and why it exists;
 - The benefits of implementing METS;
 - The nature of the existing METS community;
 - The critical role METS plays for transferring digital object in the digital preservation community.
- B. *In addition, participants will get insight into:*
 - How METS may be used in conjunction with PREMIS;
 - How different organizations implement METS within their own repositories;
 - The nature of conformance with METS.

VI. SHORT BIOGRAPHIES OF ORGANIZERS

Karin Bredenberg is a Senior Technical Advisor on metadata at the Swedish National Archives. She currently serves as the chair of PREMIS EC, co-chair of TS EAS, chair of the DILCIS Board as well as a member of the METS Board. Currently Bredenberg is the activity lead for specifications in the project E-ARK4ALL and the eArchiving Building block.

Juha Lehtonen is a Senior Applications Architect at CSC – IT Center for Science located in Espoo, Finland. He acts as a main designer of methods, models and specifications for the national digital preservation services, and is a coordinator between the partner organizations using the services and digital preservation developers. In 2012-2014, he attended in APARSEN – EU/FP7 Network of Excellence project and was leading the activities related to preservation policies. He has been a member of the METS Editorial Board since 2017. Before his career at CSC, he has participated in high-tech industry related projects in spectral color research and has acted as a technical coordinator of digitization services for natural history collections of Finland. Lehtonen received his Ph.D. in Computer Science from University of Joensuu in 2009.

Sean Mosely is a Digital Preservation Technical Specialist at the National Library of New Zealand Te Puna Mātauranga o Aotearoa. Over the past ten years, Sean has held various positions relating to physical and digital preservation across national institutions in Australia and New Zealand. Sean

has developed various tools that utilise METS and complementary metadata standards, with a particular focus on automated and scalable digital ingest solutions. Sean has been a member of the METS Editorial Board since 2017.

REFERENCES

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