Making Your Content Available in the Catholic Portal

The Catholic Portal is comprised of relevant metadata records from its members. Members share their metadata with CRRA by making their records available on a web server where CRRA "harvests" the records and adds them to the Portal. As needed, CRRA can also provide the web server space for members.   The steps below describe the process for members to identify and make metadata records destined for the Portal available for harvesting by the CRRA.

1. **Understand the scope of the Portal**. The scope of the Portal is described on our website at http://www.catholicresearch.net/cms/index.php/the-catholic-portal/content-and-scop/ . In short, the Portal contains rare, unique, and/or uncommon materials, in all formats, useful for scholarly Catholic research.

2. **Identify your resources and collections**. Identify your resources and collections falling into the Portal scope. Examples might include manuscripts, rare books, digitized text, images, sound recordings, the papers of famous individuals, the archives of leading organizations, pamphlets, newspapers, etc.

3. **Determine how your resources and collections are described**. For each of your resources and collections identified in Step #2, determine which ones have metadata and which ones don't. For items *having* metadata, ask yourself, "How they are denoted in our various computer systems? Are they all in a particular call number range? Do they comprise the universe of items in our special collections department? Are they all of the things encoded as EAD files? Do they all have some specific local note in our library catalog? Are they all saved in a particular local spreadsheet or database?" The answer to these questions will help you determine how to extract your metadata for the Portal.

4. **Optionally, flag records as "CRRA."** Once you have identified records appropriate for inclusion in the Portal, you may want to denote them as such. For example, if your records are in MARC, insert something like "crra" into a local note such as 590 subfield a. If your records are EAD files, then you may want to insert "crra" into the <notestmt> within the <filedesc> element. This is one method that has worked for some members. Many possibilities exist, given the institution's workflow.

5. **Validate records.** Each and every record destined for the Portal *must* have three metadata characteristics:
   1) First, they must have a *unique identifier.* For MARC records this is the 001 field. For EAD files, this is a <unitid> element. Identifiers are used by the Portal as database keys.
   2) 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 denoted by the contents of a

<unititle> element. These descriptive title elements provide a means for searching and put the object in context for the reader.

3) 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 subfield u. 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.

6. Extract metadata records

> **Note:** Remember, **it is important that your CRRA Web server folder contain *all* records your institution wants displayed in the Portal.** Member records destined for the Portal are harvested on a regular basis and are added to the Portal by "refreshing" *all* Portal records for the institution. As new records destined for the Portal are identified or added at your institution, ADD them to your Web server folder of CRRA records. Similarly, if you delete items from your institution that are currently in the Portal, delete them also from your CRRA Web server folder and they will then be deleted from the Portal.

Run a report against your computer system searching for ALL your records (*past and present*) destined for the Portal, whether in a particular call#, collection, etc. or if flagged as CRRA. If, for example, your records are in MARC and flagged as crra, then search your integrated library system for all records containing "crra" in 590 subfield a. Save the set of results as a MARC record file on a Web server. Tell Eric Morgan (emorgan@nd.edu) the resulting URL, and he will do the rest.

If your records are in the form of EAD files, then save all of the EAD files on a Web server making sure each file ends in ".xml." Tell Eric the URL of the directory containing the files, and he will do the rest.

If you are unable to put your records on a Web server, the CRRA will provide you with a place to put your records on an FTP server, and the metadata can be harvested from there. This is called the CRRA Dropbox, and it is described at
http://www.catholicresearch.net/blog/2012/07/dropbox/

6. **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, it is recommended that member create a process for selectors to denote items destined for the Portal. One way to do this is to add a special "crra" note to the acquisitions record. As the acquisitions are completed, records will also need to be updated with "crra" flags. Metadata will need to be extracted on a regular basis or by writing a script that runs regularly.

7. **Repeat.** This sort of work is never done. Begin at Step #2 about twice 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

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Eric Lease Morgan & Pat Lawton
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