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R. Cecilia Knight, Elizabeth Rodrigues, Rebecca Ciota,

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# Collaborating for metadata creation on digital projects: using Google Forms and Sheets

*R. Cecilia Knight, Elizabeth Rodrigues and Rebecca Ciota*

## Background

Interest in digital projects has grown among faculty, students and staff at academic institutions including Grinnell College. Many of these projects would benefit from robust and well-designed metadata to make the materials discoverable while providing context. When collaborating with these constituents on digital projects, librarians encounter certain challenges. The first hurdle is to educate potential project leaders on the concept of metadata. Once the project leaders understand metadata, they need tools to create robust metadata.

At the beginning of a project, the librarians and digital liberal arts technologists help the project leaders decide on the tools or platforms and the metadata requirements. By requesting sources of inspiration from the project leaders, the supporting technologists can identify the potential software to be used and understand what an ideal final product would look like. These conversations can be influential, as the faculty, students or staff project leaders flesh out their ideas and their workflows in collaboration with the technical support people. Throughout this process, the librarians help the project leaders develop an understanding of the metadata requirements. The librarians do this by taking notes and then restating the project goals and aspirations, as articulated by the project leaders.

At the Grinnell College Libraries, the librarians have tried a variety of approaches to support and facilitate the creation of metadata. First, we used spreadsheets with columns labeled with XPaths to the Dublin Core and MODS fields and labeled the columns with non-technical language. These spreadsheets tended to overwhelm people rather than facilitate the process of identifying their metadata needs.

Instead of engaging with the 47-column spreadsheet to identify their metadata elements, they would begin inputting information into their platform, accepting the defaults and not fully considering what questions they wanted to be able to ask of their project. This common pitfall encouraged the librarians at the Grinnell College Libraries to seek a less overwhelming, more user-friendly alternative to creating metadata.

## Inspiration

The Grinnell College Libraries Special Collections and Archives collaborated with the Grinnell College History Department in a large-scale digital project with the central goal of engaging students in creating a digital collection. During this project, we realized an opportunity when a student, Willa Collins, took the spreadsheet with an input form created specifically for the project and created a Google Form that fed into a Google Sheet that we could all access and add to. This appealed to the students because it was a more familiar environment, as most of the students use Google Drive. As the students began working, the project facilitators were able to go into the Sheet and look for issues with the metadata and give feedback. We were also able to enhance the Form by adding subject headings and names to the controlled lists, as well as add clarifying notes to guide the students in creating the entries.

This was the type of iterative process that the faculty member desired to enter into with the students. As we met with the students, we encouraged them to consider what kinds of questions could be answered with these materials and what kinds of stories might be told. We asked them to think about these frameworks both in relation to the immediate context of the project

and in regards to the wider world. While this was not as successful as we hoped, with uneven results from student to student, the metadata is much stronger than the metadata created for earlier projects.

## Process

We have adopted and adapted this approach with the commitment of the digital liberal arts technologists who are the other major support technologists along with the librarians. People come to one of several people with their ideas and we work together to help them find their way to a successful project.

In the course of coming to a shared understanding of what they hope to do, we explore different possibilities in terms of platforms. We look at other projects that we can draw upon as models that the project leaders might want to articulate with or that they might be able to collaborate with.

In the course of these exploratory conversations, we introduce the concepts around metadata by listening for the questions and stories that they are imagining and reflecting back on how these can be facilitated using structured data. While it might be that they want a website as they initially expressed, they might want something more structured or may want to use multiple software platforms in creating their project.

Some people are used to working with data and databases and jump right into their own spreadsheets or the target platform with a clear understanding of what elements need to be populated to be able to retrieve the objects later. There is no attempt to force these people to use a specific process if they are finding success with another approach.

Other people are less intimidated by the idea of working in Google Forms than they are by working in

spreadsheets or within specific platforms. More students are entering higher education with a familiarity with Google Apps and other Web tools, and this is their natural approach to creating and organizing.

People do not always intuitively realize the importance of having good data to support their current and more aspirational needs and benefit from coaching. This is particularly true for heavy image projects because the only words that will be available for discovery tools will be the ones provided by the metadata creators. We have found that Google Forms to Sheets can provide an entry way for these people by setting up a process that is readily iterative.

We will ask people to create three metadata examples and come back and chat again about how their thought process has developed. Have they thought of more questions they would like to be able to have people ask? Are there observations that they have made about their materials or objects that they would like to express? Is there a thesaurus or ontology that they want to take advantage of to facilitate discovery across projects? Is there additional emerging or less formal language that they want to be sure to include that is not part of a formal ontology? Metadata creation for digital projects differs slightly from traditional cataloging practice because we are less likely to have traditional authority functionality for either names or topics, and for Web discovery, we need to think of each object on its own in the universe without anything but its metadata to tie it back to its origins.

In these initial conversations, we also inquire about how long they want their project to persist; who will have access to it; who owns the materials/objects that will be featured; whether mapping should be supported by their metadata; whether it is primarily a teaching project, a learning project or a scholarly project, etc. Copyright, privacy, accessibility and quality all come into play in the course of deciding what the presentation venue might be for a given project.

The Form belongs to the project leaders and will be used collaboratively with the project support in the libraries and digital liberal arts. Versioning can

be set up, so we can roll back or revisit if needed.

The metadata created using this method can be used in a digital asset management system, Omeka, for website creation, in an institutional repository and other databases and platforms that may not exist yet. Metadata mapping needs to be done to meet the needs of each target collection and platform. The metadata can also be enhanced and reingested if desired rather than going back and adding fields to each record when we realize that we wish we had included a particular data element.

Many platforms have ways to load and reload data to try things out. This allows us all to see what the results of their work can be and know that they can go back and make adjustments and enhance functionality. Most projects have several trial runs before committing to a set of metadata elements and proceeding into production mode.

The librarians and digital liberal arts technologists are able to access the Sheets, even as they are being populated, and massage the data to try it out in the target platforms.

### Google Form

We generally come to early conversations to talk about goals for a project with a basic spreadsheet, table or list including the essential metadata elements including title, creator, abstract, topic(s), place(s), format, genre and filename. Eight elements are easier to engage with than 47. As we enter the conversation, we take notes and check for understanding. As we wrap up, we will address the question of how they would like to proceed with the next step of creating a few metadata records before coming together again to make decisions about the next steps.

If Google Forms will be the tool used to facilitate metadata creation, the librarian working with this part of the project will create a draft Form supporting the goals identified by the owner. The draft Form will be shared with the owner and other collaborators, so that they can make changes and add notes and clarifications that will make the Form work for them.

The G Suite Learning Center[1] has basic directions on setting up Google

Forms. As with any form or survey, it is important to consider what type of data you want to collect and what format it will be in.

Forms are useful for conducting surveys, collecting registrations, giving quizzes, etc. as well as collecting metadata for digital projects. The types of questions that are useful for metadata collection include: short answers, paragraphs, multiple choice, check boxes and drop downs. The other options are not as applicable to our needs.

While refining the Form, it can be useful to share with collaborators. Typically, a librarian starts a Form and adds the project leader and other support people as collaborators, so that they can check for understanding and begin to set up the Form in a way that works for them.

Google Apps work slightly differently in each operating system and in each browser. For setting up the Form, use a computer of some type. For collecting data, you can use a variety of devices.

Once you have your base form:

1. Use COPY under the three dots at the top to create and name each new Form.
2. Title or retitle your Form as you wish by clicking on the name and deleting and typing:
  - Note: At this time, you are editing the Form and not collecting data. As editors, you can go back and edit the Form whenever you want, even after the data collection has begun. If you add elements to your Form your Sheet will not have consistent columns, so experiment early and settle on your questions or elements before going into production. If you add elements, it is better to do so at the end of the Form to have a consistent Sheet even if it is out of logical order. The people who can edit the Form need to be sure to use the link to collect data when they are submitting entries.
3. Use + to add a question (or metadata element).

4. When editing questions, your options become available when you click on the question. The type of question is the first choice as mentioned above and it is important to make sure this is appropriate. You may experiment with this and change type while developing the Form:
    - Note: These sometimes stick when you copy a Form and sometimes do not. You can change the words or label used to define the question by typing over what is there. For example, a collection of letters might use the label “Correspondent” while a collection of artworks might use “Artist” when collecting names. A generic label of “Creator” might be chosen for a mixed type collection.
  5. Use dropdown, if you have a controlled vocabulary (such as type or genre) and need one answer.
  6. Use multiple choice, if you have a controlled vocabulary or regularly repeated entries that you do not want to type over and over:
    - Note: Adding a | (pipe) after each entry can signal that these are separate elements. You can have an “add other” here as well (when you, as the owner, notice repeated entries you can add to the Form itself).
  7. Use short answer for elements that vary from object to object in an unpredictable way:
    - Note: If entering multiple values in the same short answer place | (pipe) between them to signal that they are separate entries. The | (pipe) is a little used keystroke that appears on the key with \ (backslash) on the QWERTY keyboard. It is easy for computer programs to parse. This is useful for names of people, subjects, topics, places, etc. A | (pipe) is not needed after the final element.
  8. Use paragraph for abstracts and for notes. These elements are opportunities to plant keywords and variant forms of names, places and topics.
  9. Use the six dots that appear in the top center when you click on a specific question to drag the question to a different location in the Form. Make sure that the Form is ordered in a way that works for your work and thought process.
  10. Elements that will be repeated in every entry can be added in columns at the beginning of the Sheet so that you do not have to choose them each time. These might include elements such as the name of the collection, the institution that owns the materials, notes about provenance of a collection, etc.
  11. At the bottom of each question there are several options:
    - you can duplicate an existing question using the symbol that looks like two sheets of paper;
    - you can delete a question by clicking on the garbage can;
    - to add clarifying text click on the three dots and choose “description”; and
    - you can make an element required using the slider. Be careful to only make things required that are absolutely required such as “Title”.
- Next steps after setting your Form up:
- Under the three dots at the top of the Form, use “Add Collaborators” to invite colleagues to work on the Form itself. Collaborators do not have to have Google accounts, but it is simpler if they do so that they can find their Forms and Sheets in their own Drive rather than following the provided link. You will access these in the Shared With Me section of your Google Drive or by using the link. These people will continue to be able to edit this form. Forms that you make and set up yourself in your Google Drive will belong to you and be in your Google Drive.
  - Click on “Responses” at the top of the Form to create a corresponding spreadsheet, in the dialogue box that opens click on the three dots and
- Create a new spreadsheet. The spreadsheet will inherit the name of the Form and be in your Shared With Me or your Drive depending on who created the Form.
- Use “SEND” at the top of the Form to send the fillable form to the people who will enter data, including yourself. Follow this link to fill in the Form.
  - You can save effort by populating elements that will be repeated for everything in the collection or project by adding columns at the beginning or end of the Sheet. These could be the name of collection, the department that the person is affiliated with, their name, etc.
  - If you add filenames later in the process then do not make it required in the Form and fill them in on the Sheet.
  - Crosswalks for the target platform can be added to the Sheet after the first several objects have been populated or at the point that you are ready to ingest them.
- Pros and cons:
- Google Sheets are less likely to reformat the various numbers that are input than commercial programs. We have struggled the most with dates and numbers being reformatted, as the spreadsheets are sent back and forth between people.
  - The Form does not consistently copy with all of its settings kept in place. We always have to go in and verify the set-up for each question, set the Form to fill in a Sheet, set the Sheet up for the crosswalk for the target platform, etc. Comments disappear when we copy Sheets.
  - If you are not a Google Campus, then your campus information technology probably will not provide support. It is important to consider whether the materials that you are working with could be compromised through this process.

### Final comments

Google Forms can provide a less intimidating and natively collaborative

entry into digital projects by making it possible for multiple people to bring their ideas and skills together to create a tool to collect metadata for a specific project. The owner can have control of their creative vision and have the capability to bring in technical support at a variety of times when they are able to enhance or facilitate the project. This makes it an excellent part of the digital projects toolkit.

#### Note

1 To learn more about the G Suite Learning Center, visit <https://gsuite>.

[google.com/learning-center/products/forms/get-started/](https://google.com/learning-center/products/forms/get-started/). Or just “google” it.

#### FURTHER READING

G Suite Learning Center (2017), available at: <https://gsuite.google.com/learning-center/products/forms/get-started/> (accessed 24 July 2017).

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**R. Cecilia Knight** ([knight@grinnell.edu](mailto:knight@grinnell.edu)) is Acquisitions and Discovery Librarian at the Grinnell College, Grinnell, Iowa, USA.

**Elizabeth Rodrigues** ([rodrigue8@grinnell.edu](mailto:rodrigue8@grinnell.edu)) is based at the Grinnell College, Grinnell, Iowa, USA.

**Rebecca Ciota** ([ciotareb@grinnell.edu](mailto:ciotareb@grinnell.edu)) is Discovery and Integrated Systems Librarian at the Grinnell College, Grinnell, Iowa, USA.