

## Batch Loading Metadata Records into Luna Insight

### Prerequisites:

#### Originating data source

The originating data source is the file, database, or other data store in which the metadata records were originally created and stored. The originating data store must have the capacity to export records in a delimited file or as XML. Since most data sources have this functionality, it is impossible to anticipate and write procedures for all potential data sources. This procedure covers records that originate in the ILS. If the metadata exists in another data source, consult its documentation for exporting records.

#### Metadata crosswalk

If the existing metadata scheme is different than the metadata scheme in Luna Insight, a crosswalk must be created to map fields from the original scheme to the destination scheme. Crosswalks can be created using the DIAL metadata worksheet, found on <http://ucblibraries.colorado.edu/systems/digitalinitiatives/tools.htm>.

#### Luna Insight metadata import template

The Luna Insight metadata import template contains a collection's field labels in the required order for metadata import. This template is unique to each collection and is stored as an Excel spreadsheet found on <http://ucblibraries.colorado.edu/systems/digitalinitiatives/tools.htm>.

#### Millennium Create Lists

#### Excel

This procedure describes the process of batch loading pre-existing metadata into Luna Insight version 5.5 and applies to metadata that originates from the integrated library system (ILS). The process involves three stages: exporting metadata from the originating data source, preparing the metadata, and importing the metadata into Luna Insight.

### STAGE 1: Exporting the Metadata

1. Locate the collection's Luna Insight metadata template (excel file) on <http://ucblibraries.colorado.edu/systems/digitalinitiatives/tools.htm> and save a copy locally. The excel file containing the collection's Luna Insight metadata import template will be referred to as the *metadata import template* in this procedure.
2. Locate the collection's crosswalk and save a copy locally.
3. Using Millennium Create Lists, create a review file containing the metadata records. (See page 100667 in the Millennium for instructions [<http://libraries.colorado.edu/manual>])
4. Use the crosswalk to determine which fields should be exported. Use the metadata import template to determine the order in which the fields should be exported.
5. Export the relevant metadata fields. (See page 105412 in the Millennium for instructions [<http://libraries.colorado.edu/manual>]) In the Create List Export dialog box, order the fields according to the metadata template.
6. Save the exported list to a location on your desktop.

### STAGE 2: Preparing the Metadata

1. Open the exported list in Excel. To parse the data, use the Text Import Wizard or choose "Text to Columns" from the data menu.
2. If a field contains repeating values, select the column that contains that field. Choose "Text to Columns" from the data menu to parse the repeating values. Reiterate this step until all repeating fields are parsed into separate columns.
3. Insert a blank row in the first row of the spreadsheet.
4. Cut and paste the corresponding field label from the metadata template into the spreadsheet so that the first row of the spreadsheet contains the appropriate field labels for each column. The field label order in the spreadsheet must be the same field label order from the metadata template.

5. If the spreadsheet contains repeating field values, copy the field label and append a number to the end of the field label for each column. For example, if the metadata records contain three values for subject and the field label is "LCSH\_Subject", then the field labels in the spreadsheet will be "LCSH\_Subject1", "LCSH\_Subject2", and "LCSH\_Subject3".
6. Depending on the metadata scheme, data may require additional manipulation (e.g. concatenating or parsing fields or changing a date format). This can be accomplished in Excel; consult the Excel help files for more information.
7. Save the file as Text (Tab Delimited). Name the file after the collection for easy recognition.

### STAGE 3: Importing the Metadata

1. Save the tab delimited file to a networked drive.
2. Open Insight Studio and select the collection.
3. Click on the "Import Data" icon.
4. Under file name, browse to the location of the tab delimited file.
5. Click next.
6. Review the mappings page to ensure that the columns from the tab delimited file are associated with the appropriate fields labels.
7. Click finish.