

e-government metadata standard *e-GMS*

Draft for consultation

Please send comments to Maewyn Cumming, Metadata Policy Adviser, Office of the e-Envoy, Stockley House, 130 Wilton Road, London SW1V 1LQ.
maewyn.cumming@cabinet-office.x.gsi.gov.uk by 22 February 2002



The UK e-Government Metadata Standard v2

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1. DOCUMENT HISTORY

v. 0.0	Sent to members of the MWG.	
v. 0.1	Testing version. Additional elements will be tested in the field.	
v0.2	Open consultation, for response by 2002-02-22.	09 Jan 2002

2. LINKS

e-Government Metadata Framework (e-GMF)	< http://www.govtalk.gov.uk/interoperability/metadata_document.asp?docnum=219 >
e-Government Interoperability Framework (e-GIF) v3	http://www.govtalk.gov.uk/interoperability/egif_document.asp?docnum=363
Compliance Statement	< http://www.govtalk.gov.uk/interoperability/egif_document.asp?docnum=326 >
XML schema	(not yet completed)
List of related projects and organisations	< http://www.govtalk.gov.uk/library/library.asp?page=4&order=title&librarydocs=3 >
Government Data Standards Catalogue	http://www.govtalk.gov.uk/interoperability/egif_document.asp?docnum=361

3. INTRODUCTION

3.1. Background

The reasons and policies for developing this standard are outlined in the e-Government Metadata Framework.

To summarise them;

- Modernising Government calls for better use of official information, joined-up systems and policies, and services designed around the needs of citizens.
- Considerable work has already been done to standardise government information systems so they can be accessed easily from central portals.
- New systems for the handling of electronic records are being devised. Official records will not always be stored in paper format.
- Metadata makes it easier to manage or find information, be it in the form of web pages, electronic documents, paper files, databases, anything.
- For metadata to be effective it needs to be structured and consistent across organisations.
- The e-GMF is therefore mandated across all government information systems. By association, so is the e-GMS

3.2. Genesis of the e-GMS

The first version of this Standard, as described in the e-GMF, consisted of simple Dublin Core. In this version, additional elements have been added to facilitate information and records management. The following principles, from the e-Government Metadata Framework, were followed when the additional elements and application profile were created.

e-GMS Principles

It will be **Independent**. It will not be software, application or project based, but flexible enough to meet the information retrieval and records management needs of any information held in any format.

It will be **Simple** to use. The standard must be readily applicable by those with widely varying experience of preparing resource descriptions.

It will be **Compliant with other UK Government standards** and policies, such as the e-GIF standards and the Government Data Standards Catalogue.

It will be Compliant with international standards . Information is an international resource, and the UK aims to remain a leader in the global information revolution. To achieve this, the metadata standard must reflect international standards and systems. If an international standard is appropriate and kept up to date it will be incorporated into the e-GMS. Preference will be given to standards with the broadest remit, so appropriate international standards will take preference over EU standards, EU will take preference over UK standards.
It will be Stable . Changes to a standard that will become embedded in all information systems will require considerable effort, time and resources to implement. The e-GMS must therefore be flexible enough to meet future as well as current needs.
It will be Extensible . Additional element refinements can be added where it can be shown that these are essential and the existing set does not make provision for the requirement. A balance will need to be struck between the need for extensibility and the need for stability.
It will be economical and give Value for Money .
It will be Inclusive , taking into account the many existing metadata schemes, with the aim of minimising the need to rework existing products. This will be balanced with the need for maximum interoperability, which requires consistency across all information resource descriptions.
Above all , it will meet the information retrieval and management needs of the citizen and of government.

3.3. What this guide includes

For each metadata element you will find the following data:

Obligation: All elements are allocated a level of obligation. These are:

- *Mandatory*: this element must have a value.
- *Mandatory if applicable*: this element must be given a value if the information is available.
- *Recommended*: should be given a value if the data is appropriate to the given resource.
- *Optional*: should be given a value if the data is appropriate to the given resource.

The obligation applies to the element as a whole. Values can be added to either the unqualified element or to one or more refinements.

Refinements:: The refinements, or sub-elements and other controls over the values of the element . A client who does not understand a specific element refinement term should be able to ignore the qualifier and treat the metadata value as if it were an unqualified (broader) element.

Repeatability. Can the element be repeated, and if so how often, in one metadata record. It is recognised that some systems cannot cope with repeated elements or refinements.

Examples: To indicate how the elements could be filled in for a variety of different types of resource. It is used in an informal way, intended to demonstrate the meaning of the element or refinement. The exact text will vary between applications.

Notes: Giving background information, the purpose of the element, its application to different aggregation levels and other factors.

Encoding schemes:: Standards and schemes which were consulted before deciding on this format. Where it has not been possible to fully adhere to recognised encoding schemes (indeed many systems clash with each other) the principles behind them have been taken into account. A complete list of the Encoding schemes referred to can be found at Appendix 1.

Mapping: Lists the elements in other metadata schemes that the element maps to. The other schemes compared are

Dublin Core: the set of metadata elements and refinements developed by the Dublin Core Metadata Initiative, which makes up the core of the e-GMS

DRAFT

AGLS: Australian Government Locator Service

NGDF: The National Geospatial Data Framework

GILS: Government Locator Service, used in the USA

PRO: Metadata elements recommended by the UK Public Record Office.

For ease of reference, the elements are listed in alphabetical order.

4. AUDIENCE

A category of user for whom the resource is intended.

Optional Repeatable

This element is used to

- indicate the level or focus of the resource
- enable further filtering or narrowing of a search to items suited to the intended audience

The audience for a resource may be one of two basic classes: (1) an ultimate beneficiary of the resource (such as a student or trainee), or (2) an entity that mediates access to the resource (such as a teacher or trainer). The mediator element refinement represents the second of these two classes.

It is envisaged that the refinements will be used most extensively by organisations specialising in education, though it will have value for other sectors, such as health and social services. Example, if the resource contains information on social security benefits the ultimate audience is the person who receives benefits, but access to this is often mediated by a social worker.

Encoding schemes will be needed if the real value is to be gained from this element. Various educational encoding schemes are available, and no doubt there are others for other domains, e.g. health. *We need to list these and decide which are the most useful, and if necessary develop a UK government scheme.*

Refinements:

Mediator	An entity that mediates access to the resource.
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Examples:

AUDIENCE: Students MEDIATOR: Teachers

AUDIENCE: Engineers

AUDIENCE: UK Citizens

Mapped to:

Dublin core	Audience (DC-ed)
AGLS	Audience
NGDF	
GILS	
PRO	

5. CONTRIBUTOR

An entity responsible for making contributions to the content of the resource.

Mandatory if applicable Repeatable

Examples of a Contributor include a person or organisation. Typically, the name of a Contributor should be used to indicate the entity.

Include all persons or organisations that played an important role in creating the content of the resource but do not appear in the 'creator' element.

Examples:

CONTRIBUTOR: Photographs by O Shutter

CONTRIBUTOR: Edited by Mike Ukpai, Cabinet Office

For minutes drafted by a minutes secretary but for which responsibility for content belongs with the Chair of the meeting. (The Chair will be entered in the Creator field)

CONTRIBUTOR: Drafted by A O Jones, Department of Administrative Affairs

Encoding schemes:

Government Data Standards Catalogue

Mapped to:

Dublin Core	Contributor
AGLS	Contributor
NGDF	
GILS	Contributor
PRO	

6. COVERAGE

The time period and place covered by the content of the resource.

Recommended Repeatable

This element is extremely useful for limiting a search to information on a particular place or time.

Data will usually be put under Spatial or Temporal rather than the broader Coverage. For items such as maps and area-specific statistics that require more specific geographic detail the DCMII Point or similar refinement should be used.

‘Spatial’ includes jurisdiction, town, county, borough, constituency, region etc.

For preference, repeat the element for each value if the resource covers more than one area or time period. Alternatively use ; as a list separator (see first example).

Give enough detail to ensure places that share names can be accurately identified, e.g. Newcastle, New South Wales, Australia.

When the ‘Spatial referencing by coordinates’ refinement is used, all of the further refinements should be filled in.

‘System of spatial referencing by coordinates’ should specify the scheme used, e.g. ‘Irish National Grid’ or ‘Latitude and Longitude’. It should always be followed by the four bounding coordinates. This refinement can be repeated if it is useful to record the coordinates in more than one system, e.g. the Irish National Grid references *and* Latitude and Longitude.

‘Temporal’ refers to the time period covered by the content of the resource not its creation or publication date. Dates should be in standard W3C format e.g. yyyy-mm-dd. The further refinements given here will mainly be used for situations where greater detail about the time covered is important, e.g. statistics or geographic information.

Refinements:

Spatial	Postcode	
	Unique Property Reference Number	
	Spatial referencing by co-ordinates	System of spatial referencing by coordinates
		Bounding rectangle
		West bounding coordinate
		East bounding coordinate
		North bounding coordinate
		South bounding coordinate
	Spatial unit	
Temporal	Beginning date	
	End date	
	Data capture period	
	Status of start date of capture	

DRAFT

	Start date of capture	
	End date of capture	

Examples:

For a tale of two cities

COVERAGE.SPATIAL: Brussels, Belgium

COVERAGE.SPATIAL: Stockholm, Sweden

Prefer the above to

COVERAGE.SPATIAL: Brussels, Belgium; Stockholm, Sweden

For a set of statistics covering all of the UK and broken down by county

COVERAGE.SPATIAL: UK SPATIAL UNIT: COUNTY

For a resource about events which occurred between 13th March 2000 and 13th March 2001

COVERAGE.TEMPORAL: 2000-03-13/2001-03-13

For a document looking at events in Lewisham during the 1950s

COVERAGE.TEMPORAL: 1951/1960

COVERAGE.SPATIAL: London Borough of Lewisham, London, UK

For a 2002/03 tax return, collected by the IR during 2003/04

COVERAGE.TEMPORAL.BEGINNING DATE: 2002-04-01 END DATE: 2003-03-31

START DATE OF CAPTURE: 2003-08-01 END DATE OF CAPTURE: 2004-04-01

Encoding schemes:

Spatial

Government Data Standards Catalogue

DCMI Point: identifies a point in space using its geographic coordinates

<http://dublincore.org/documents/dcmi-point/>

DCMI box: identifies a region of space using its geographic limits

<http://dublincore.org/documents/dcmi-box/>

ISO 3166 Codes for the representation of names of countries

<http://www.din.de/gremien/nas/nabd/iso3166ma/codlstp1/index.html>

TGN The Getty Thesaurus of Geographic Names

http://shiva.pub.getty.edu/tgn_browser/

ISO 19115 <http://www.anzlic.org.au/asdi/metaiso.htm#iso>

Temporal

W3CDTF <http://www.w3.org/TR/NOTE-datetime>

DCMI Period: A specification of the limits of a time interval

<http://dublincore.org/documents/dcmi-period/>

Mapped to:

Dublin Core	Coverage <i>Refinements</i> : Spatial, Temporal
AGLS	Coverage; <i>Refinements</i> : Spatial, Temporal; Jurisdiction; Postcode
NGDF	Geographic extent; <i>Refinements</i> Spatial referencing by coordinates: System of spatial referencing by coordinates; West bounding coordinate; East bounding coordinate; North bounding co-ordinate; South bounding coordinate; Postcode district extent; National Extent; Administrative area extent; Date capture period; Status of start date of capture; Start date of capture; Status of end date of capture; end date of capture; Frequency of update
GILS	Spatial domain; Place; Place keyword thesaurus; Place keyword; Bounding coordinates; West bounding co-ordinate; East bounding coordinate; North bounding co-ordinate; South bounding coordinate; Time period; Beginning date; Ending date; Time period textual; Time period structured
PRO	

7. CREATOR

An entity primarily responsible for making the content of the resource.

Mandatory Repeatable

Examples of a Creator include a person or organisation. Typically, the name of a Creator should be used to indicate the entity. This agent often has legal responsibilities and obligations, and personal names may be needed for audit trails.

To enable a resource to be tracked when the division creating it has been disbanded or the Creator has moved on, include the full hierarchy, e.g. department, division, section, team. It is often best to 'depersonalise' the creator, and give the job title rather than the name.

Give full contact details if possible, especially when they are not to be given elsewhere, i.e. where the creator is different from the publisher/distributor. If possible use generic e-mails rather than personal ones, as these are less likely to change, e.g. aviation.stats@dtlr.gov.uk

Acronyms may be meaningless to users. Use the full official title of the organisation, or link to a glossary or explanatory note.

Refinements:

Owner	Use when it is essential or helpful to record the person or organisation who has chief responsibility for the content of the resource. This may be needed for audit trails or other legal or official purposes.
Contact	The individual or organisation to be contacted for further information about the content of the resource. <i>Should this be here, or part of the resource itself? It is not needed for information retrieval, but may be essential if the metadata is to be placed in a separate metadatabase. Should it be a separate element?</i>
Custodian	The individual responsible for the management of the documents. <i>Do we need this in addition to owner. Are they effectively the same thing?</i>

Examples:

For a resources for which chief responsibility for content rests with the Assistant Director, but ownership of the policy rests with the overall organisation, and a third person is the 'expert' to whom enquiries should be sent in the first instance.

CREATOR: Assistant Director; Technology Strategy Team, Office of the e-Envoy, Cabinet Office ukgovtalk@e-envoy.gov.uk **OWNER:** Office of the e-Envoy, Cabinet Office, 130 Wilton Road, London SW1V 1LQ, info@e-envoy.gov.uk **CONTACT:** Interoperability Strategist, Technology Strategy Team, Office of the e-Envoy, Cabinet Office ukgovtalk@e-envoy.gov.uk

CREATOR: Information Services Unit, Department of Administrative Affairs (DAA), Room 27, 301 Whitehall, London SW1. lis@daa.gsi.gov.uk

DRAFT

For the minutes of a meeting which were drafted by the minutes secretary but for which responsibility for content rests with the chair of the meeting. (The minutes secretary appears in the Contributor element)

CREATOR: Jon Tiles, Association of County Councils, Denmark dba@arf.dk

For a resource prepared by an external consultant

CREATOR: Stella Dextre-Clarke, Consultant SDClarke@LukeHouse.demon.co.uk

OWNER: Department of Administrative Affairs, Information Technology Directorate, info@daa.gsi.gov.uk

Encoding schemes:

Government Data Standards Catalogue

Mapped to:

Dublin Core	Creator.
AGLS	Creator
NGDF	Originator.
GILS	Originator.
PRO	Author/Originator; E-mail sender name.

8. DATE

A date associated with an event in the life cycle of the resource.

Mandatory Repeatable

Dates need to appear in a format that is recognisable to people all over the world, and that can be interpreted by computer software. The W3C format allows accurate searching, and makes it clear which is the year, month or day. The format is yyyy-mm-dd, where yyyy is the year, mm is the month and dd the day.

When the time is also needed, add Thh:mm, where hh is the hour (using the 24 hour clock), mm is minutes. For more detail of this notation can be found at <http://www.w3.org/TR/NOTE-datetime>.

The Date field refers to dates relevant to the information resource itself, not the information held within the resource. For example, for a document about the civil service in the 18th century, put '18th century' in Coverage and put the date published in Date.

Refinements:

Acquired	<p>Definition: Date on which the resource was received into the organisation.</p> <p>Comment: The nature of a resource can change when it is submitted by one authority to another (e.g. in legislative procedures) without necessarily any change being made to the content of that resource.</p> <p>EXAMPLE: The date that a legislative text is tabled for consideration (=date of acquisition by the House) is not the same as the date the resource is adopted (by the submitting or receiving authority).</p> <p>Includes date/time an e-mail was received.</p>
Available	<p>Definition: Date (often a range) that the resource will become or did become available.</p> <p>Q. Should this refinement be used specifically to indicate when a completed resource is made available internally, and 'Issued' be used to indicate when a resource was made available to the public? Would this distinction be valuable, and would it cause confusion?</p>
Created	<p>Definition: Date of creation of the resource.</p> <p>Comment: . The date this version of the resource was created/completed or the capacity to store the resource as part of a collection was established, e.g. the creation date of a folder, from when it was available for documents to be added, or the creation date of a web-site or part of a web-site. Includes date/time an e-mail was sent.</p>
Cut-off date	<p>Definition: Regular date on which the folder should be segmented into a new part, e.g. at commencement of financial year.</p>
Declared	<p>Definition: Date on which the resource was declared, filed or registered as a record.</p>
Closed	<p>Definition: The date the capacity to store the resource as part of a collection was revoked, e.g. the close date of a folder.</p>
Issued	<p>Definition: Date of formal issuance (e.g. publication) of the resource.</p> <p>Comment: The date the resource was or is scheduled to be made publicly available. Includes publication or release date.</p> <p>Q. See query under 'Available'</p>

Modified	Definition: Date on which the resource was changed.
Updating frequency	Definition: How often the resource is updated. Especially relevant for databases. Comment: <i>This conflicts with the Dublin Core ‘dumb down’ principle http://dublincore.org/resources/faq/#dumbdown as values in this refinement will not fit into the broader element, i.e. ‘daily’ isn’t a date.</i> Option: <i>include this information in the Description.</i>
Valid	Definition: Date (often a range) of validity of the resource. Comment: Includes closing date for receiving comments on consultation documents.

Examples:

For a press release approved and sent to editors on 2nd December 2002 but not available for public viewing until 11:00 a.m. the following day

DATE.CREATED: 2002-12-02 AVAILABLE: 2002-12-03T11:00

For an e-mail received on 3rd July 1997

DATE.ACQUIRED: 1997-07-03T15:37

DATE.DECLARED: 1996-07-28 CLOSED: 1998-03-16

For a spreadsheet which will be replaced at the end of the financial year

DATE.CUT-OFF DATE: 2004-03-30

For the summer timetable of a local bus route

DATE.VALID: 2003-05-01/2003-10-31

For a home page that went live on 6th January 2000

DATE.ISSUED: 2000-01-06

The same home page the following May, after it has been edited

DATE.MODIFIED: 2000-05-01

For a document completed and approved on 9th September 1997

DATE.CREATED: 1997-09-09

Encoding schemes:

Government Data Standards Catalogue

W3CDTF <http://www.w3.org/TR/NOTE-datetime> for details

Mapped to:

Dublin Core	Date <i>Refinements</i> ; Created; Valid; Available; Issued; Modified.
AGLS	Date <i>Refinements</i> ; Created; Modified; Valid; Issued.
NGDF	
GILS	Date of publication; Date of publication structured; Date of publication textual.
PRO	Date/time of document creation; Date/time of record declaration; Date/time of e-mail receipt; Folder open date; Folder close date; Electronic part open date; Electronic part close date.

9. DESCRIPTION

A description of the information contained in the resource.

Optional Repeatable

The description could cover:

- Approach to subject (e.g. critique, explanation, beginners guide)
- Reason for production of resource (e.g. to inform, invite comments)
- Groups and organisations referred to
- Events covered
- List of key fields (database) or chapters
- Any other useful information

Hints:

- ?? Try to picture the description in a long list of hits, under its title. The chances are that only the first line will be immediately visible.
- ?? Keep it brief, with the most important part first.
- ?? Try not to duplicate information held elsewhere (e.g. in the Title, Coverage or Subject elements).

Refinements:

Table of contents	A list of subunits of the content of the resource.
Abstract	A summary of the content of the resource.

Examples:

DESCRIPTION: Information resources, mainly unpublished, held by UK government departments, agencies and other bodies. Lists availability, contact details for further information, and sometimes with links directly to resource. Searchable by keyword.

DESCRIPTION.ABSTRACT: Leaflet for parents explaining the purpose of the introduction of Home-School agreements, which are compulsory for all maintained schools from September 1999

DESCRIPTION: The Department of Administrative Affairs web site, with current and background information on UK public administration, the machinery of government, and the UK civil service.

DESCRIPTION.TABLEOFCONTENTS: Document History / Introduction / Preparation / Lists of elements / General principles / Elements

Mapped to:

Dublin Core	Description
AGLS	Description
NGDF	Abstract
GILS	Abstract
PRO	Description

10. DISPOSAL

The retention and disposal instructions for the resource.

Optional Repeatable

This is an essential element for helping keep records under control, ensuring they are not kept after they are needed but not disposed of before time.

It is recommended that all web pages have a Review date, so webmasters can easily locate pages before they become out-of-date and send them to their organisations' records office.

The refinements 'Conditions' and 'Action' will be used almost entirely for long-term records management purposes.

Refinements:

Review	Date on which the resource should be reviewed to determine the need to retain it.
Conditions	A specific period of time following a specific event determining the period for which the resource must be kept for business purposes.
Action	The action to be taken when the condition is reached.
Review details	Details of reviewers and any review decision taken.

Examples:

DISPOSAL.CONDITIONS: Five years after completion of programme ACTION: Retain until transfer to PRO

For a web page which states that "The final report will be published in August 2003"

DISPOSAL.REVIEW: 2003-08-01

The above information is used to alert the owner at the appropriate time. The owner updates the text to 'The final report has been delayed. It will be available later in 2003', and changes the metadata to read:

DISPOSAL.REVIEW: 2003-10-20

Encoding schemes:

Action PRO specified list: (Review and further disposition; Destroy; Retain until transfer to PRO)

Mapped to:

Dublin Core	
AGLS	
NGDF	
GILS	
PRO	Disposition rule

11. FORMAT

The physical format of resource.

Recommended Repeatable

Have separate metadata for each format of the resource, rather than one entry with several formats listed.

Use the Relation element to indicate that the resource is available in alternative formats.

Refinements:

Extent	The size or duration of the resource.
Medium	The material or physical carrier of the resource.

Examples:

For a travel guide with additional material

FORMAT: Book with map insert

For a database

FORMAT: Database EXTENT: 345+kb MEDIUM: Access 97

For a software application

FORMAT: Application MEDIUM vnd.ms-access

For a web page in HTML

FORMAT: Text MEDIUM: html

Encoding schemes:

Media **IMT**: The Internet media type of the resource.

<http://www.isi.edu/in-notes/iana/assignments/media-types/media-types>

Mapped to:

Dublin Core	Format <i>Refinements</i> Extent; Medium
AGLS	Format
NGDF	Presentation Type; Supply Media; Data format
GILS	Medium (Refinement of Availability)
PRO	Physical record type

12. IDENTIFIER

An unambiguous reference to the resource within a given context.

Mandatory if applicable Repeatable

Identifiers are extremely useful for finding a specific resource, also for confirming that you have the correct version, and as shorthand for referring to the resource elsewhere (see 'Relation' for examples).

Recommended best practice is to identify the resource by means of a string or number conforming to a formal identification system. Be cautious about using URLs as these can change.

It is not always possible to find a unique identifier for a resource, especially if it is not practical to use the URL. Examples include forms or leaflets that are produced by the organisation and need to be easily identified. While these usually have a code allocated (e.g. SA100 for a tax return form) this code is rarely universally unique (SA100 is also a biplane, an amplifier, a set of kitchen scales, a marine antennae, a broadband service unit, a caller ID unit for telephones, a course on Canadian society at the Simon Fraser University, a bus stop in Ottawa, an MP3 player....) [Identifiers can be made 'more unique' by prefixing them with the IARN (IAR Number departmental code), which is allocated to each government department and agency by HMSO. See <http://www.inforoute.hmso.gov.uk/> for details.]

Examples:

IDENTIFIER: DTR/CA/NATS/2000-8769B

IDENTIFIER: [ISBN]0711504083

IDENTIFIER: [URI]<http://www.e-envoy.gov.uk/e-gif>

For a tax return form, the Inland Revenue IARN followed by the form code.

IDENTIFIER: IR000-SA100

Encoding schemes: include

ISBN

ISSN

URI <http://www.ietf.org/rfc/rfc2396.txt>

IARN <http://www.inforoute.hmso.gov.uk/>

Mapped to:

Dublin Core	Identifier
AGLS	Identifier
NGDF	Identifier
GILS	Schedule number
PRO	Numerical identifier; Numerical reference code

13. LANGUAGE

The language(s) of the data in the resource.

Recommended Repeatable

The use of language codes simplifies the inputting of the language element. Most users will learn the relevant codes quickly. Most systems can be set so that the name of the language is displayed in full, which is more user-friendly.

Use of the language element is especially important for resources that will be loaded onto the internet. It is an invaluable means for people to limit their searches to items that are relevant to their own needs.

Examples:

For a resource written in English

LANGUAGE: [ISO 639-2/B] En

For a resource written in Welsh and English

LANGUAGE: [ISO 639-2/B] Cym

LANGUAGE: [ISO 639-2/B] En

For a Polish translation of a resource originally written in Portuguese. (Use 'Relation' to link to the original Portuguese version)

LANGUAGE: Pol

Encoding schemes:

ISO 639-2/B <http://www.loc.gov/standards/iso639-2/>

Mapped to:

Dublin Core	Language.
AGLS	Language.
NGDF	Language.
GILS	Language of resource.
PRO	

14. LOCATION

The physical location of the resource.

Optional Repeatable

This will mainly be used for items held in a physical format, e.g. paper files.

It will also be valuable for electronic resources stored on physical media, e.g. magnetic tapes or CD-ROMs.

Don't use this element for the URL or filename and path. Such information should go in the Identifier element.

Examples:

LOCATION: Storeroom 16, box 38

LOCATION: Library, Hansard Room, disc 1874D

LOCATION: Room 84B, Acme Storage Facility, Hackbridge.

Encoding schemes:

Where relevant refer to the Government Data Standards Catalogue

Mapped to:

Dublin Core	
AGLS	
NGDF	
GILS	
PRO	Location.

15. PRESERVATION

Data needed to support the perpetual preservation of records.

Optional Repeatable

This element will be based on the PRO 'Preservation' metadata standard, which is under construction. It will be mainly used by PRO staff and others engaged in managing the long-term storage of official records, and contains all of the information needed to read or interpret records decades or centuries from now.

Mapped to:

Dublin Core	
AGLS	
NGDF	Preservation history.
GILS	
PRO	Preservation.

16. PUBLISHER

An entity responsible for making the resource available.

Mandatory if applicable Repeatable

'Publisher is used here in its loosest sense, so an organisation that places an information resource on a web site is the publisher, even if no hard-copy version is made available. The publisher is the person or organisation a user needs to contact in order to obtain permission to re-publish the information contained in the resource or to obtain copies in a different format.

A publisher has certain legal rights and responsibilities regarding the information, so should always be named.

Examples:

PUBLISHER: Cabinet Office, Office of the e-Envoy, Stockley House, 130 Wilton Road, London SW1V 1LQ. webmaster@e-envoy.gsi.gov.uk

PUBLISHER: The Stationery Office, St Crispins, Duke Street, Norwich, NR3 1PD. Telephone 0870 600 5522. Facsimile 0870 600 5533. E-mail esupport@theso.co.uk

Encoding schemes:

Government Data Standards Catalogue

Mapped to:

Dublin Core	Publisher
AGLS	Publisher
NGDF	Supplier
GILS	Distributor
PRO	

17. RELATION

A reference to a related resource.

Optional Repeatable

Recommended best practice is to reference the resource by means of a string or number conforming to a formal identification system, i.e. the referenced resource's Identifier.

When using qualifiers, use the most specific one that is applicable. Relation can be used to allow cascading retrieval of interrelated objects, especially if used in conjunction with the Type element. It is also invaluable for linking items in multiple parts, different versions of the same resource and items available in multiple formats.

Refinements:

IsPartOf	The described resource is a physical or logical part of the referenced resource.
HasPart	The described resource includes the referenced resource either physically or logically.
IsVersionOf	The described resource is a version, edition, or adaptation of the referenced resource. Changes in version implies substantive changes in content rather than differences in format.
HasVersion	The described resource has a version, edition, or adaptation, namely, the referenced resource.
IsFormatOf	The described resource is the same intellectual content of the referenced resource, but presented in another format.
HasFormat	The described resource pre-existed the referenced resource, which is essentially the same intellectual content presented in another format.
References	The described resource references, cites, or otherwise points to the referenced resource.
IsReferencedBy	The described resource is referenced, cited, or otherwise pointed to by the referenced resource.
IsRequiredBy	The described resource requires the referenced resource to support its function, delivery, or coherence of content.
Requires	The described resource requires the referenced resource to support its function, delivery, or coherence of content.
IsReplacedBy	The described resource is supplanted, displaced, or superseded by the referenced resource.
Replaces	The described resource supplants, displaces, or supersedes the referenced resource.
SequenceNo	The resource's allocated number in a sequence to which it belongs.

Examples:

For a publication with an associated press release

RELATION: Press release 2002-01-03, <http://www.idea.gov.uk/news/press/030102.htm>

For a web site which replaces an earlier web site with similar content

RELATION.REPLACES: www.open.gov.uk

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For an updated policy document

RELATION.ISVERSIONOF: The e-Government Interoperability Framework v2

For a folder that groups together files on particular issue

RELATION.HASPART: DAA/FIN37/22/2001/LBR2001-08-13

RELATION.HASPART: DAA/FIN37/22/2002/LBR2001-08-14

RELATION.HASPART: DAA/FIN37/22/2002/LBR2001-08-17

RELATION.HASPART: DAA/FIN37/22/2002/LBR2002-01-12

For a file that belongs in the above folder

RELATION.ISPARTOF: DAA/FIN37/22/2001

For a document that is No 7 in the 'Information Management' series

RELATION.ISPARTOF: Information management series SEQUENCENO: 7

For a resource interpreting a set of statistics, but not listing those statistics

RELATION.REQUIRES: [ISBN]398762342X

For an HTML document that is also available in hard copy

RELATION.ISFORMATOF: [ISBN]0711504083

Encoding schemes:

URI

ISBN

ISSN

Mapped to:

Dublin Core	Relation <i>Refinements</i> IsPartOf/HasPart; IsVersionOf/HasVersion; IsFormatOf/HasFormat; References/IsReferencedBy; IsRequiredBy/Requires; IsReplacedBy/Replaces.
AGLS	Relation <i>Refinements</i> : IsPartOf/HasPart; IsVersionOf/HasVersion; IsFormatOf/HasFormat; References/IsReferencedBy; IsBasedOn/IsBasisFor IsRequiredBy/Requires; IsReplacedBy/Replaces.
NGDF	Dataset association; Additional information source.
GILS	Cross reference <i>Refinements</i> : Cross reference title; Cross reference relationship; Cross reference linkage; Linkage; Linkage type.
PRO	See also folder link(s); Hybrid electronic/paper folder link; Link between 'instance' and 'originating' record; Sequence number; Related document/file ID; Version number(is version of, Has version); Electronic parts (Has Part).

18. RIGHTS

Information about rights held in and over the resource.

Optional Repeatable

Indicates the user's right to view, copy, redistribute, republish or otherwise make use of all or part of the resource.

If possible provide a link to a resource giving more details about the rights marking, e.g. the 'Crown copyright' statement at www.hms0.gov.uk/copyhome.htm.

Access Rights indicates the legal or other basis upon which governs public access to the resource. Examples include the Freedom of Information Act, Data Protection Act and the EC Regulation No 1049/2001 regarding public access to European Parliament, Council and Commission documents (http://europa.eu.int/eur-lex/en/lif/dat/2001/en_301R1049.html)

For departmental records, where no Security Classification marking is given, it will be assumed that the resource is unclassified.

Refinements:

Security classification	The classification allocated to the resource indicating its official security status.
Previous security classification	The classification allocated to the resource indicating its official security status prior to its current status.
Security classification change date	Date on which previous security classification was altered. Options (and see examples below) 1. SecurityClassificationChangeDate as an additional refinement. This breaches the DC 'dumb down' principle http://dublincore.org/resources/faq/#dumbdown 2. Add date information to security value, e.g. 'Secret, changed 2001-12-28' or 'Top secret, review on 2003-07-09'. This would still be searchable by date, but makes it difficult to separate the date from the classification – you may want the public or other group to see one but not the other. 3. Add Security Classification Change as refinement of Date element. This could cause confusion if there is more than one change in the resource's classification, and splits up related data. 4 Do not include change date in the metadata.
Descriptor	Indicates the nature of the asset's sensitivity and the need to limit access accordingly.
Folder/record caveat	
Codeword	A term used to provide security cover for reference to a particular protected resource.
Electronic signature authentication	Data regarding the validation of an electronic or digital signature attached to a record or the digital certificate.
Owner	Named individual or organisation which has responsibility for granting access to the resource.

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Business group access permission	Defined teams or groups to which access to the resource is limited.
Username access lists	A list of persons allowed access to the resource.
Circulation list	Names of persons or groups to whom the document has been circulated, including names held in 'to' and 'copy' fields of e-mails.
Time validity	The date on which the current access controls expire. <i>Q. Same problem as Security classification change date. Same solutions apply, e.g. add the validity data to the security value, e.g. 'classified, valid until 2003-07-09'</i>
Access rights	Legal or other rights an individual has to access the resource or that regulate the administration's right to release or provide access to the resource.
Copyright	Statement and identifier indicating the legal ownership and rights regarding use and re-use of all or part of the resource.

Examples:

RIGHTS.SECURITY CLASSIFICATION: Secret TIME VALIDITY: 2031-05-27

RIGHTS.COPYRIGHT: Crown copyright www.hms0.gov.uk/copyhome.htm

Encoding schemes:

Encoding schemes should be used in accordance with the needs and procedures laid down by the owning organisation.

Government Data Standards Catalogue for names, addresses and date/time.

Mapped to:

Dublin Core	Rights.
AGLS	Availability; Rights.
NGDF	Access constraints.
GILS	Availability; Access constraints; <i>Refinements</i> : General access constraints; Security classification control.
PRO	Folder/record protective marking security category; Previous folder/record protective marking; Previous folder/record protective marking change dates; Folder/record descriptor; Folder/record caveat; Folder/record codeword; Folder/record business group access permission; Folder/record username access list; Time validity; Schedule; Folder owner; circulation list; E-mail recipients.

19. SOURCE

A reference to a resource from which the present resource is derived.

Optional Repeatable

The present resource may be derived from the Source resource in whole or in part. Recommended best practice is to reference the resource by means of a string or number conforming to a formal identification system i.e. the referenced resource's Identifier.

Do not use 'Source' if it is more appropriate to put this data in the 'Relation' element, i.e. it may be more accurate to use the 'IsVersionOf' or 'IsBasedOn' refinements of the 'Relation'

Examples:

SOURCE: Figures derived from Wired in Whitehall survey by the Committee of Departmental Librarians 1998 <http://www.aslib.co.uk/proceedings/2001/jan/03.html>

SOURCE: Information provided by the American Geophysical Union, Bureau of the Census, Central Intelligence Agency, Defence Intelligence Agency, Defence Mapping Agency, Defence Nuclear Agency, Department of State, Foreign Broadcast Information Service, Naval Maritime Intelligence Centre, Office of Territorial and International Affairs, US Board on Geographic Names, US Coast Guard, and others.

SOURCE: Photographs from the Foreign and Commonwealth Office Library Photo Archive

Encoding schemes:

URI
ISBN
ISSN

Mapped to:

Dublin Core	Source.
AGLS	Source.
NGDF	
GILS	Sources of data.
PRO	

20. SUBJECT

Key words and phrases indicating the subject matter of the resource.

Mandatory Repeatable

The SUBJECT is an important information retrieval tool; the more thought that is put into the contents of this element, the more likely users are to find exactly what they need.

This element describes the subject of a resource, not its Type, e.g. don't include 'Maps' as a subject if the resource is a map, instead use 'Maps' as a subject if the resource is *about* maps, mapmaking, cartography etc.

Only use the unqualified element if no controlled vocabulary is available. It may also be used for abbreviations, plurals, and spelling variations that may help a user locate the resource.

Using the most specific terms, and *not* including more general terms, helps prevent information overload. For example, someone looking for a web site covering their government's overall policies on health will have to search using 'health' as the main subject term. It won't help if the hit list is full of items on specific health issues such as the long term effects of too many vitamins or a shortage of doctors in Stourbridge.

When setting keywords for a web site, select terms that describe the page in question only, not the entire site. This will help users go straight to the information they are looking for, and will also help with navigating the site using the local search engine.

Refinements:

Category	Broad subject categories from a prescribed list. Comment: This is to allow users to scroll down through a list of very broad terms (e.g. health, environment) to narrower categories (e.g. Private health care, Water resources). It is important to choose terms from a controlled list only: e.g. the UK Government Category List.
Keyword	Words or terms used to describe, as specifically as possible, the subject matter of the resource. Ideally these should be taken from a controlled vocabulary or list.
Process Identifier	Indicates a specific service or transaction, using an identifier taken from a recognised list.
Pro-gramme	The broader policy programme that this resource relates to directly. Comment There is no formal definition of a 'programme' or what differentiates it from a 'project'. As a general rule, programmes are broad government policy programmes that will take several years or more to complete, e.g. e-Government or Civil Service Reform. The Projects are more specific manageable chunks that make up the larger Programme. It will be useful to agree with your team or even entire organisation what is a Programme and what is a Project. Bear in mind that this is used mainly to find all items belonging to a particular project or programme. Think <i>objective</i> . Don't use these if they have no particular value to you or your users.
Project	The specific project that this resource relates to directly. Comment See comment above under 'Programme'.

Examples:

For a policy document on heart disease

SUBJECT.CATEGORY: Heart disease and stroke **KEYWORD:** Heart attacks; coronary heart disease; Treatment; Prevention **PROGRAMME:** The NHS plan **PROJECT:** Coronary heart disease

For a web site

SUBJECT.CATEGORY: Crime/crime reduction; Young people **KEYWORD:** Young offenders; Criminals; Repeat offenders; Crime reduction; Zero tolerance; Electronic tagging **PROGRAMME:** Intensive Supervision and Surveillance Programme **PROJECT:** Electronic tagging

For one of a series of documents looking at take up of private health care by various societal groups

SUBJECT.CATEGORY: Private health care; Minority groups **KEYWORD:** Private health care; Greek Cypriots

For a web site giving advice to citizens travelling abroad

SUBJECT.CATEGORY: Tourism **KEYWORD:** Foreign travel; Safety; British embassies; Consulates

For a web page leading to a form for applying for planning permission

SUBJECT.CATEGORY: Town & Country Planning **PROCESS IDENTIFIER:** PL030A (PL030A is the CUPID code for applying for planning permission)

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Encoding schemes include:

Category: **Government Category List**
<http://www.govtalk.gov.uk/interoperability/metadata.asp?order=title>
Process Identifier: **CUPID** www.leap.gov.uk

Keyword: Internal departmental thesauri.
National Curriculum metadata standard
<http://www.nc.uk.net/metadata/index.html>

Mapped to:

Dublin Core	Subject.
AGLS	Subject.
NGDF	Keywords.
GILS	Subject terms uncontrolled; <i>Refinement</i> Uncontrolled term. Controlled subject index; <i>Refinement</i> : Subject thesaurus; subject terms controlled; controlled term.
PRO	Folder subject terms; Record subject terms.

21. TITLE

A name given to the resource.

Mandatory	Repeatable
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The Title should be the name by which the resource is normally known. It may be necessary to make up a title, if none exists. Try to make it brief and meaningful rather than clever and catchy.

If the resource is an e-mail, use the subject line as the title.

For an Alternative title add any form of the title used as a substitute or alternative to the formal title of the resource, including abbreviations and translations. If a resource is commonly known officially or internally by a name which members of the public would find incomprehensible, it is recommended that an additional, meaningful name be given to it.

Think *list*. Add values such as language, version number, status (e.g. 'draft', 'draft for consultation') or date if the item is one of many with the same title, so when they all appear in a list it is easy to find the right one (see example).). **Q. *Is it a problem putting this information in the Title element if it is not part of the official title of a document?***

The title should be written in sentence case. This is much easier on the eye.

If the resources is an electronic 'folder' containing electronic documents, give the usual folder name.

Refinements:

Alternative title	Any form of the title used as a substitute or alternative to the formal title of the resource.
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Examples:

For an e-mail with an informal and uninformative subject line

TITLE: Software demo thursday ALTERNATIVE TITLE: ZitKwik application data.

Q. *Would it be better to create meaningful titles each time and avoid use of informal e-mail subject lines? Users do sometimes remember and look for e-mails with the original title, even if that title would be fairly meaningless to many.*

TITLE: The Stephen Lawrence inquiry: report of an inquiry by Sir William Macpherson of Cluny ALTERNATIVE TITLE: The Macpherson report

For the home page of a department's web site

TITLE: Department of Administrative Affairs home page

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For a series of items with the same title but different languages and different versions each year. (This is much more helpful than a long list of items all simply called 'Tax return guidance')

TITLE: Tax return guidance 2002/03 English

TITLE: Tax return guidance 2002/03 Vietnamese

TITLE: Tax return guidance 2002/03 Gujarati

TITLE: Tax return guidance 2002/03 Urdu

TITLE: Tax return guidance 2003/04 English

TITLE: Tax return guidance 2003/04 Vietnamese

TITLE: Tax return guidance 2003/04 Gujarati

TITLE: Tax return guidance 2003/04 Urdu

For a sequence of documents on one subject

TITLE: Plans for the restructuring of the Department - draft

TITLE: Plans for the restructuring of the Department - draft 2

TITLE: Plans for the restructuring of the Department - draft 3

TITLE: Plans for the restructuring of the Department – final 2003-01-08

TITLE: Plans for the restructuring of the Department – revised 2003-01-17

Mapped to:

Dublin Core	Title.
AGLS	Title.
NGDF	Title; Alternative title.
GILS	Folder title; Document title.
PRO	Record/document title; Folder Title; Collection title.

22. TYPE

The nature or genre of the content of the resource.

Optional Repeatable

This element should not be confused with the Format element. Format refers to the physical format of the resource, including the software application used to create, read and edit it. Type refers to the content of the resource.

Official records and documents often exist as parts of larger collections. Type should be used to indicate if this is the case, and also to show at which level the resource resides.

Aggregation Level allows searches to be restricted to records at a particular level of aggregation. It can be used in conjunction with Relation.HasPart to link items in a collection. Type.Aggregation Level describes where in the collection hierarchy, if anywhere, a resource sits. Relation indicates which other resources, if any, also belong in that hierarchy.

Folder Type is used when a number of items are gathered together into one container or folder. This can be an electronic or paper folder. It will sometimes be useful to create a description for a folder which is empty, i.e. it contains no parts.

Best practice is to include relevant terms from DCMI type, as well as a more specific term.

Refinements:

Aggregation level	The resource's level or position in a hierarchy. Shows the extent to which the resource is part of a larger resource or collection.
Folder type	Classification of the folder or collection.

Examples:

TYPE: Text Annual report

(Taking 'text' from the DCMI type encoding scheme and 'annual report' from the draft MIREG document type list)

TYPE: Collection AGGREGATION LEVEL: Folder FOLDER TYPE: Policy

(Taking 'collection' from the DCMI type encoding scheme and 'folder' from the hierarchical levels described in the MoReq specification)

Encoding schemes include:

DCMI type: <http://dublincore.org/documents/dcmi-type-vocabulary/> (Collection, Dataset, Event, Image, Interactive resource, Physical object, Service, Software, Sound, Text)

For a more specific description, use one of the terms at appendix B for preference.

Folder type should selected from: Policy; Case; Parliamentary Question; Ministers Case

There is no strict encoding scheme for Document type. Use one of the terms at appendix B for preference.

Mapped to:

Dublin Core	Type.
AGLS	Type.
NGDF	Type.
GILS	Type.
PRO	Logical record type.

Appendix 1: Links, references, Encoding schemes:

Dublin core Metadata Initiative <http://www.dublincore.org>

Getty Geographic thesaurus http://shiva.pub.getty.edu/tgn_browser/

Government Data Standards Catalogue <http://www.govtalk.gov.uk>

NGDF [http://www.ngdf.org.uk/for titles](http://www.ngdf.org.uk/for_titles)

International Organisation for Standardisation <http://www.iso.ch/>

United Kingdom Standard Geographic Database(UKSGB) <http://www.ngdf.org.uk/>

W3C Worldwide Web Consortium <http://www.w3.org/>

Appendix B

Type

Act of Parliament	
Advertisement	See also 'Job advertisement'
Agenda	
Article	
Annual report	
Atlas	
Briefing note	
Budget	
Call for expressions of interest	
Call for tenders	
Call for papers	For a conference or other event, or printed publication.
Case notes	
Conference proceedings	
Conference programme	
Consultation paper	
Expression of interest	
FAQ	Frequently Asked Questions
Form	
General note	
Green paper	Specific type of consultation paper
Guidelines	
Home page	
Job advertisement	
Job description	
Instructions	
Index	For example a website A-Z list
Letter	
Manual	Prefer 'Instructions'
Map	
Ministerial correspondence	
Minutes	
News & events	
Newsletter	
Policy framework	
PQ	Includes question and answer
Presentation	
Press release	
Procedure note	or work instruction
Project evaluation	
Project exception report	
Project initiation document	
Project plan	
Project risk register	
Project terms of reference	
Report	
Specification	
Speech	
Staff appraisal	
Statistics	
Statutory Instrument	
Strategy document	
Submission	
Terms of reference	
Web page	Also see home page, site map, search page, List/index
Search page	Of web site or intranet
Site map	For web site or intranet
White paper	