Best Practices for Scholar's Portal ISO 19115 (NAP)

Below are a list of best practices and instructions for creating metadata in the Scholars GeoPortal. This list includes general 'how-to' explanations; for a detailed list of metadata fields used in SP's instance of NAP, and how to complete them, see the guide to NAP metadata fields on Spotdocs. A list of common errors caused by metadata, and how to troubleshoot these, is also available on Spotdocs.

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Understanding Record Status

Metadata records in the GISEditor will be in one of four different places. The location, or status, of the record can be viewed or changed by selecting **Record Status** from the metadata record menu in the GISEditor. These statuses are:

1. In Process: a record that is "in process" is in development, and cannot be found in either the staging or production instances of the GeoPortal. When you create a new record, this is the default status of that record. When viewing the record in the GISEditor, the record will show **IN PROCESS** at the end of its name in the search tab.


2. Dev Test: a record that is in "dev test" has been pushed to the staging instance of the GeoPortal. It cannot be found by searching in production. The record will not have any tags at the end of its name in the search tab that indicate status .
3. Production: a record that is "in production" has been pushed to the production instance of the GeoPortal. The record will not have any tags at the end of its name in the search tab that indicate status.
4. Aggregated: a record that is "aggregated" has been grouped into a larger series record. The record may be in either staging or production, *depending on where the series record it belongs to is located.* The record cannot be found by searching in either the staging or production instances of the GeoPortal, rather the series record will display instead. When viewing the record in the GISEditor, the record will show **AGGREGATED** at the end of its name in the search tab.

Creating a New Record

Currently, the "Create New Record" function in the GISEditor is not working. To create a new record, either:

1. If the record is similar to an existing record, duplicate it and then make any necessary changes to the new record. To do this:
   a. Find the record you want to duplicate by searching in the GISEditor
   b. Go to the **Record Status** section of the metadata and select the **Duplicate Record** button
   c. Re-do the search for the record. You should now see two records - the duplicate will have **IN PROCESS** at the end of its name.
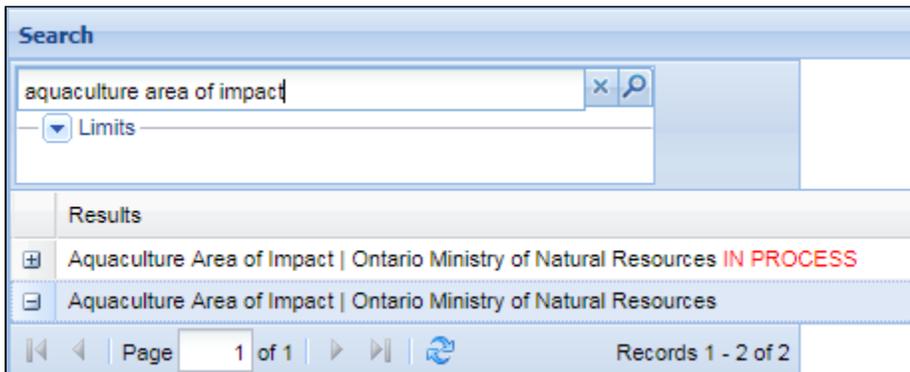
d. Select the **Metadata Record Information** section of the metadata for the duplicate. The file URI should have **_dup** at the end of the name. Change the file URI to the URI for the new record you are looking to create (see: N*aming Conventions: file URI*).

e. Once you've changed the URI, the system will refresh, leaving only the new record in your search results
f. Make remaining changes to the record as necessary

2. If the record is not similar to anything already in the system, follow the steps in #1, but using the Template record in the GISEditor (this can be found by searching Template or 3284498)
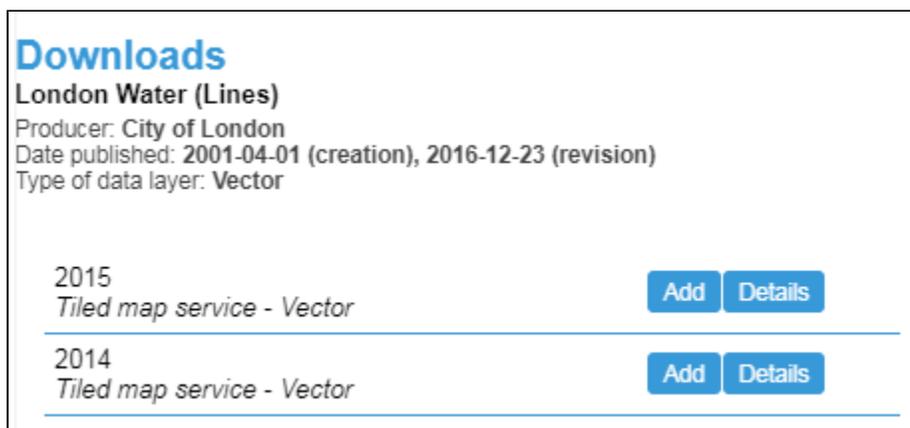
Creating a Series Record

When creating a series record, it's easiest to start by duplicating the most recent dataset record. This is because, as a rule, we use the naming convention (title), extent and thumbnail of the most recent data product for the series record. After duplicating this record, there are several changes you will need to make.

1. Find the record you want to duplicate (the most recent dataset record in the series) by searching in the GISEditor
2. Go to the **Record Status** section of the metadata and select the **Duplicate Record** button
3. Re-do the search for the record. You should now see two records - the duplicate will have **IN PROCESS** at the end of its name.

4. Select the Metadata Record Information section of the metadata for the duplicate. The file URI should have **_dup** at the end of the name.
5. Under the **Metadata Record Information** section of duplicate record, change the **File URI** field to remove any reference to year, and add **_series** to the end. For example: **/CityOfLondon_2015_Contours.xml** becomes **/CityofLondon_Contours_series.xml**
6. In the **Identification Info** section, add **(+)** a **Date**, so that there are two dates which reflect

   a. the date of publication of the earliest dataset, and
   b. the date of publication of the latest dataset.
      The first date should be categorized as "publication," the second as "revision." This indicates to users the date range of the data aggregated under the series record.
7. In **Identification Info**, remove any information that is specific to any one dataset only (if it is common to all datasets, it can be left in). This information may be found in fields including **Abstract**, **Supplemental Information**, **Spatial Resolution**.

   Note: As extent is mandatory and required for spatial searches, leave any information

8. In **Distribution Info**, add linkages for all records that you want to aggregate under this series record:
    a. Add a **label** for each linkage. This label is what will be displayed to the end-user when they click the "Add" button. If the data is a series of updates, input the year. If the data is different (ex. JPG vs. TIFF versions), add the year along with this information. <u>For example</u>: 2015; 2015 - TIFF

    b. Remember to remove all **Distribution info** from the datasets you are aggregating, otherwise the linkages will not work properly
9. In the **SP Custom** section, remove any information in **Data Holdings**. Series records should never contain any data holdings information, as the downloads will not work properly.
10. In **SP Custom**, include all links (internal and external) from all datasets.

Naming Conventions - File URI

The file URI in Metadata Record Information should reflect the file/service name as it appears in our database.The structure of this name has meaning, which may vary slightly for individual collections. Generally, this structure begins with Collectionname, and usually includes year and product. For bilingual records it may also include language,which should come at the end of the name (for more information on this, see: *Creating a Bilingual Service/Records*). A ll names must start with /NAP/ and end with .xml

<u>For example</u>:
/NAP/Western_CityOfLondon_2014_Poollin.xml
/NAP/DLI_2006_Census_CBF_Fr.xml
/NAP/Guelph_CityOfGuelph_2011_SWMPond.xml

For more information see: Naming Conventions

Note: If you are creating a record for a service that should function as an index (index functionality) this service **must** have _**vt**_ as part of the service name, and so as part of the URI. Otherwise, the GeoPortal does not understand how to present these services to the user. If you encounter an index service without _vt in the naming convention, please report this to Jo Ashley so that it can be corrected.

Naming Conventions - Metadata Record Title

The title used should be the title supplied by the vendor. However:

1. If the vendor users acronyms, leave these, but spell the word out if this is not already done. <u>For example</u>: Southwestern Ontario Orthophotography Project (SWOOP)
2. If the record will not be aggregated (grouped under a series record), the year should be added to the title in cases when we have multiple years of similar products in the GeoPortal. It should also be added to the title of series records that include multiple products *from the same year*

   <u>For example:</u>
   Mississauga Digital Orthoimagery, 2000 (dataset)
   Cartographic Boundary Files (CBF), 2011 Census (series)

3. It is not necessary to add the year to the title of products that will be aggregated under a series record. This information will be inputted into the Label field of Distribution Info, and will automatically be appended to the end of a record title once it is selected. <u>For example</u>, see: Brantford Contours (record ID: 1269502993)

Creating a Bilingual Service/Records (EN/FR)

The naming convention used for bilingual records at Scholar's Portal is to use English naming for both, but append _**Eng** to the English record and _**Fr** to the French record. This applies to both the creation of imageservices and metadata records. Do not use other language codes such as Ang, Fra, Fre, etc.

Choosing Keywords

When adding keywords, NAP requires you to include at least one keyword from either the LAC or MNR thesaurus. These thesauri are bilingual - when you search for a word, the search box will give you the option to add the french translation of this word as well. In all cases, both the English and French words should be added. This will help users who are more comfortable searching in French to locate relevant data.
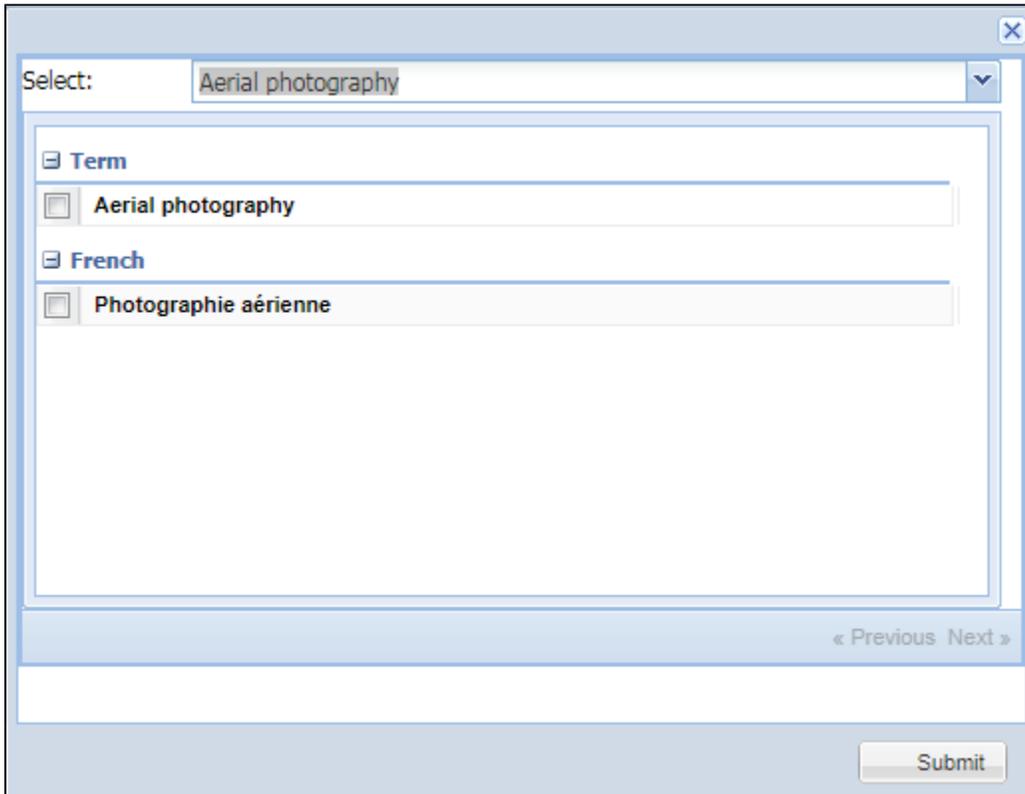
Note: If the English and French options do not show up when a word is selected, it is due to the zoom level on your browser being too far-in. Zoom out (ctrl -), refresh, and try again.