UK Location Metadata Editor v2

User Guide

Version 1.0
July 2014

uk location

Introduction

The Metadata Editor enables data publishers to produce the metadata records in GEMINI2 format, suitable for collection/harvest into data.gov.uk, fulfilling the INSPIRE obligations for location data.

There are other ways to create and publish location records in GEMINI2 format, for example with specialist GIS software, but the Metadata Editor aims to be the simplest way for data publishers in the UK.

In normal usage of the Metadata Editor, someone from a data publisher registers on the Metadata Editor website, imports existing records or creates records in a web form, validates them for INSPIRE/GEMINI2 and optionally publishes them onto a WAF, ready to be harvested into data.gov.uk. The website aims to be self-explaining, but this guide provides a walk-through of these processes to give an overview.

Note: the Metadata Editor is not suitable for non-location data. For this case, please refer to the 'User Guide for Editors and Administrators' in the data.gov.uk Library.

For more context and explanation of INSPIRE, GEMINI2 records, harvesting and WAFs etc, please consult the wider UK Location guidance:
http://data.gov.uk/location/guidance_and_tools

Versions

This guide covers the Metadata Editor that was relaunched in July 2014 and referred to as “Metadata Editor Version 2”. It was developed by EDINA, University of Edinburgh and based on their pre-existing 'GeoDoc' editor.

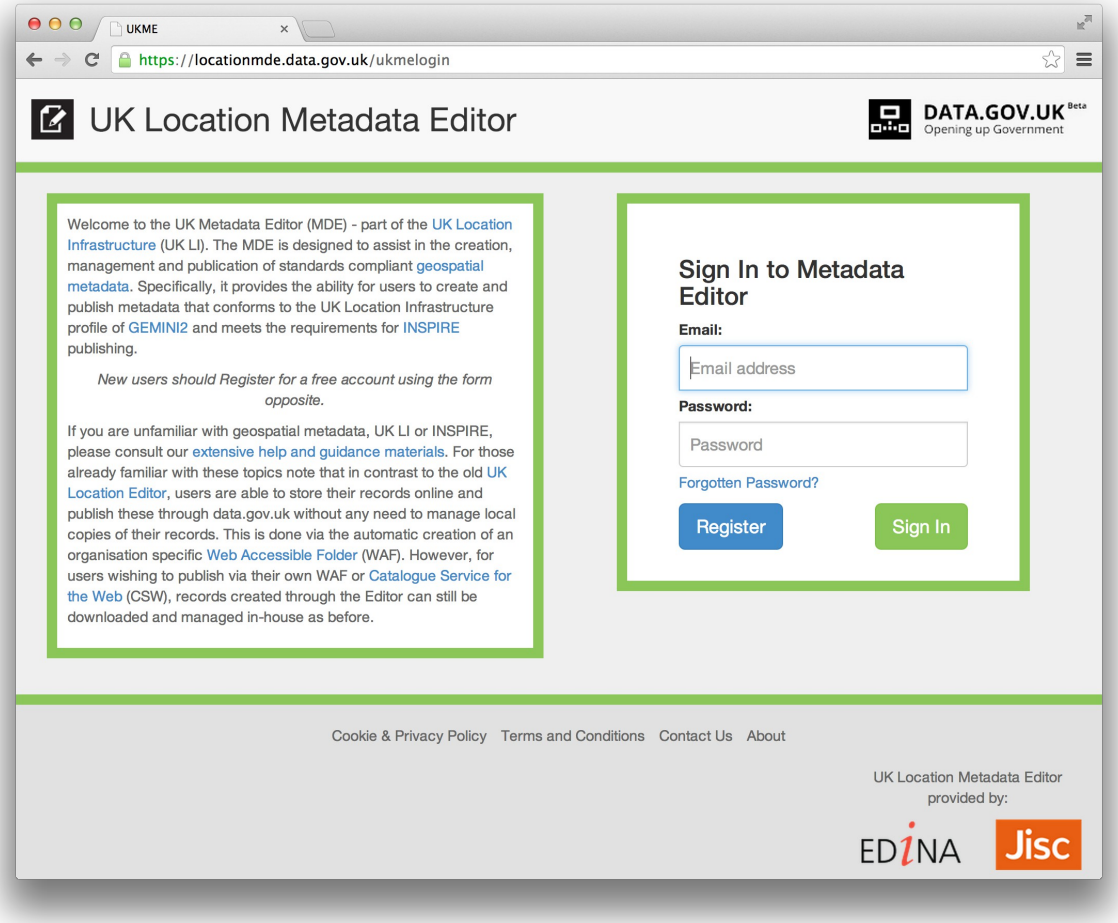
The previous version of the Metadata Editor, “Version 1”, based on Geonetwork and developed with Ordnance Survey, is no longer supported. The schemas that the Metadata Editor Version 1 used to validate the metadata became slightly out of date in March 2013 when data.gov.uk updated to GEMINI2 Schematron version 1.3 (from 1.2). However an archival of the Metadata Editor Version 1 remains to download from data.gov.uk's Library section. The use of this version is covered in “UK Location Metadata Editor User Guide”, also still available from data.gov.uk's Library.

Note: Version 2 is supplied as an online service only, whereas Version 1 was supplied as both an online service and a download.

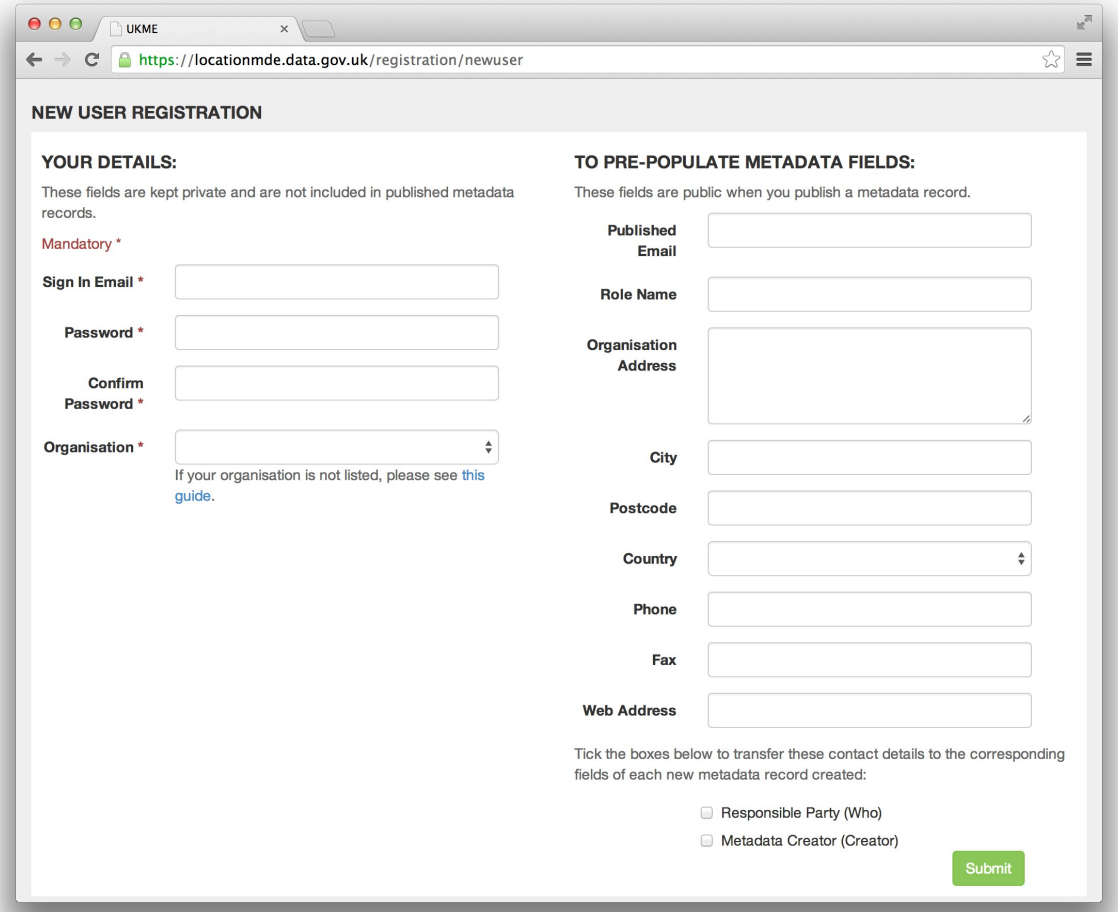
User Registration

1. In your web browser enter the location: locationmde.data.gov.uk

(Browsers supported: Internet Explorer 8+, Firefox, Chrome)



2. To create a new account, click "Register"



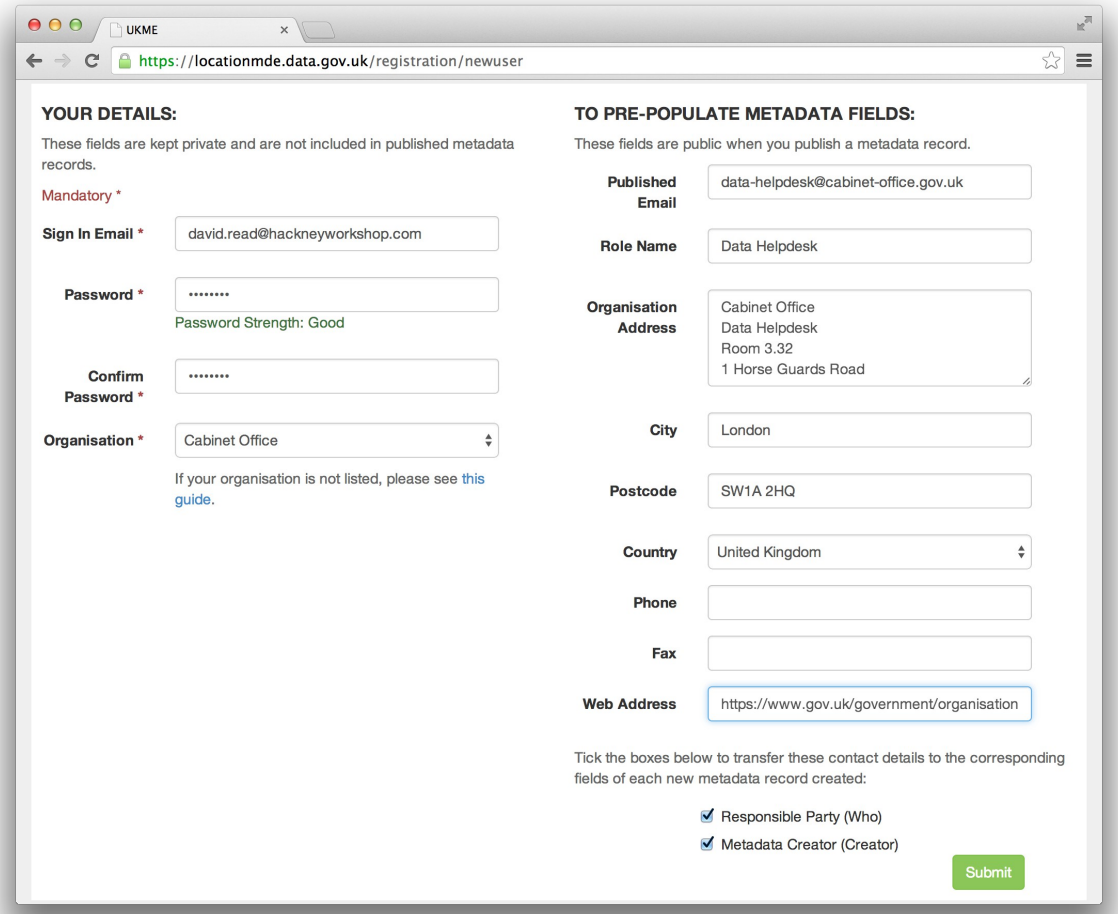
3. Fill in your email address, provide a password and select your organisation.

The password is required to be strong. The form will accept passwords that are at least 8 characters, contains no words, dates, repetition or patterns. Ideally pick a mix of random letters, numbers and symbols.

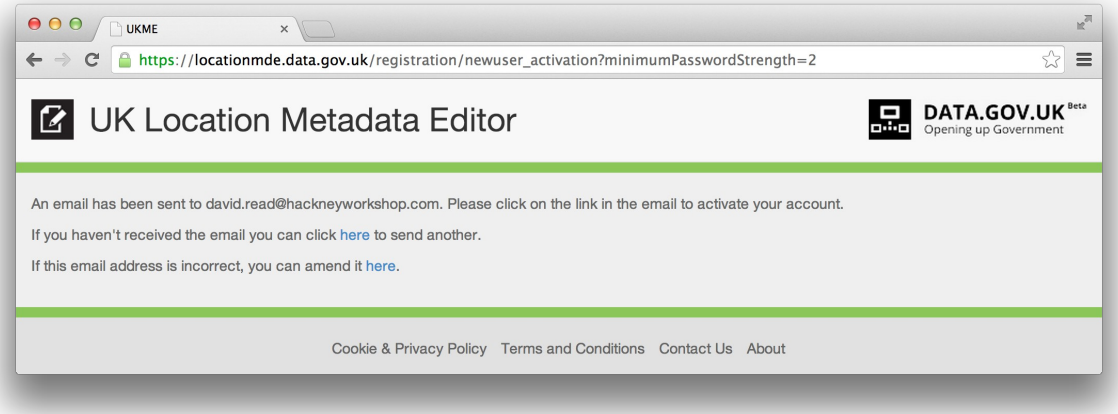
The list of organisations comes from data.gov.uk's list, so if your organisation is not listed yet then you should use the Contact form, linked from the bottom of the page at data.gov.uk, to request it is added.

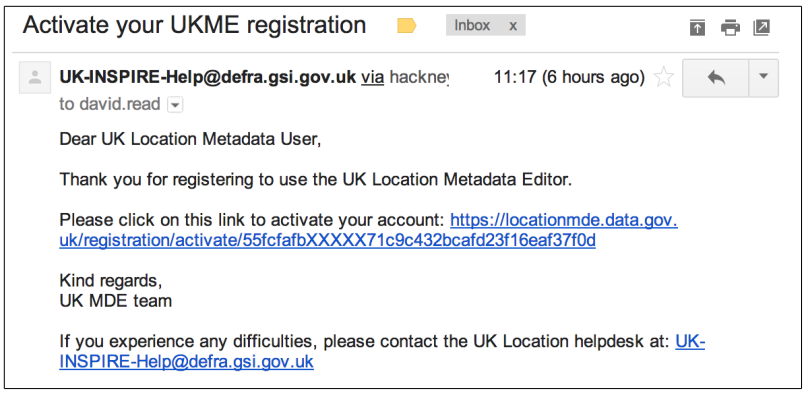
Completing the right-hand side is optional, but it is useful to enter details of your organisation if you are creating more than one record, to save you typing it multiple times later on.

Example completion:

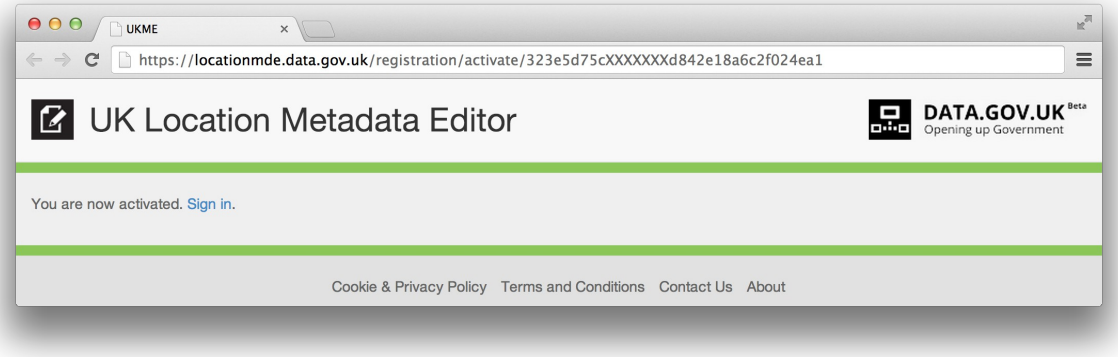


4. It tells you that an activation email has been sent. This may take up to 40 minutes to arrive in your in-box. Also check your spam folder for it.

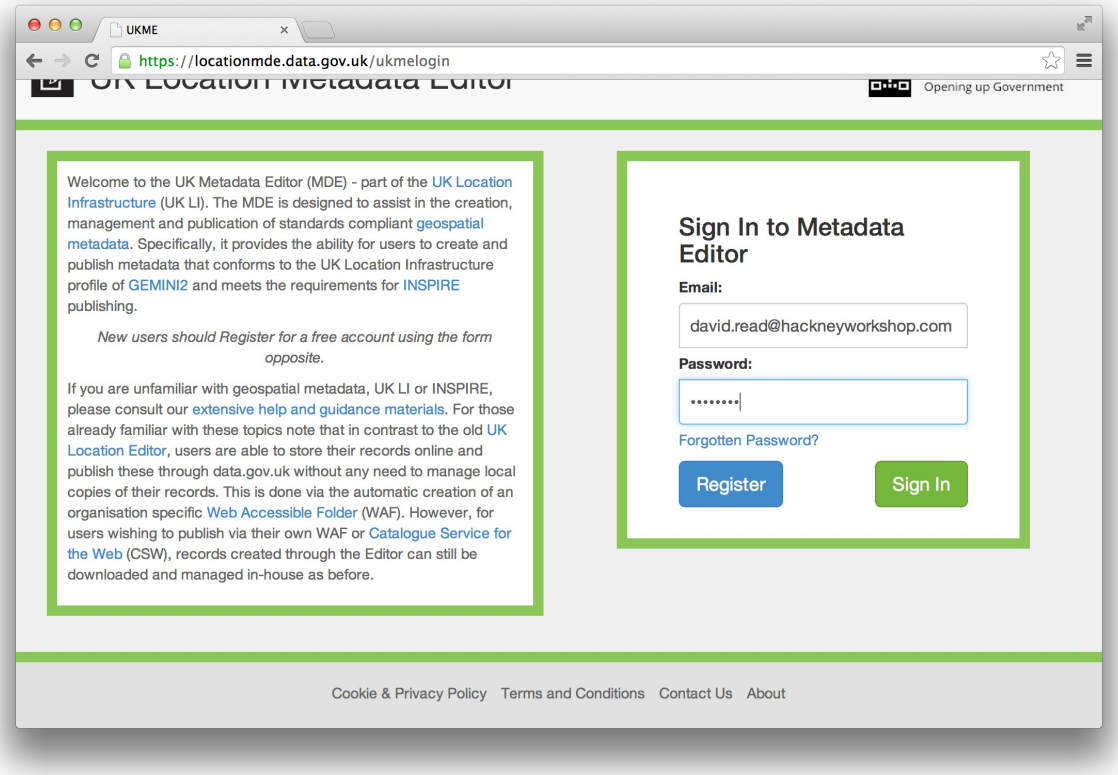




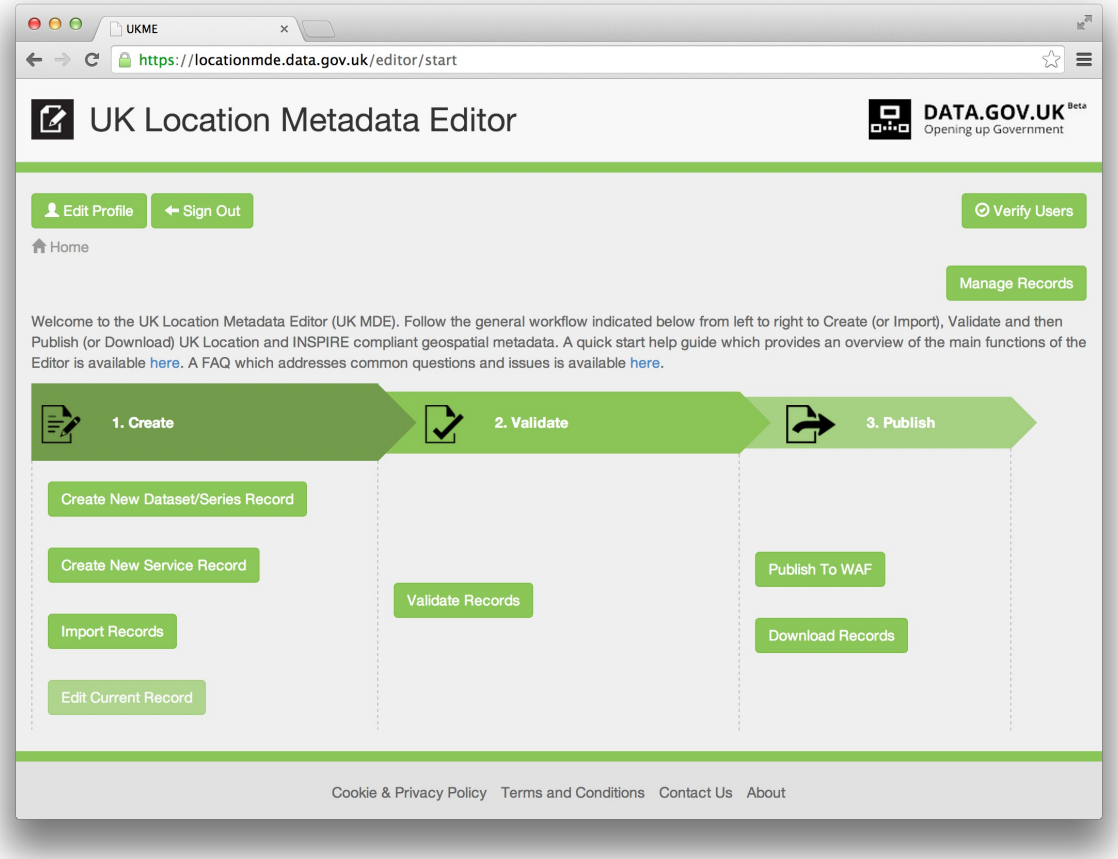
5. Clicking on the link in the email does the activation:



6. Click on "Sign in" to go to the login screen. Enter your email address and password and click "Sign in":



which takes you to the Home page as a logged in user:



Verify Users

When there is more than one user account for a publisher then it is necessary for users (apart from the first one) to be 'verified'. This is to ensure that the wrong people can't publish datasets to data.gov.uk.

The first user to register on the Metadata Editor for a particular publisher is verified in a different way to the rest. This first user can register and publish to the publisher's WAF, but to have this harvested into data.gov.uk they need to use their corresponding data.gov.uk user account to set-up the harvest in data.gov.uk. So by using their 'verified' data.gov.uk account to set this up they are showing that their Metadata Editor user account is bone fide.

Subsequent users to register on the Metadata Editor for the same publisher need to be verified in the Metadata Editor by the first user to register, or other users verified for that publisher. So a chain of trust is built.

Should problems occur, such as no-one knowing whom is verified for a publisher, then the system administrators can be contacted to resolve things. See the section in this document called 'Support'.

Verifying a user

In this example:

- User “David” has registered under organisation “Cabinet Office”. He is the first for Cabinet Office.
- User “John” registers afterwards, also under organization “Cabinet Office”. However he needs to be verified before publishing to the Metadata Editor's Cabinet Office WAF.

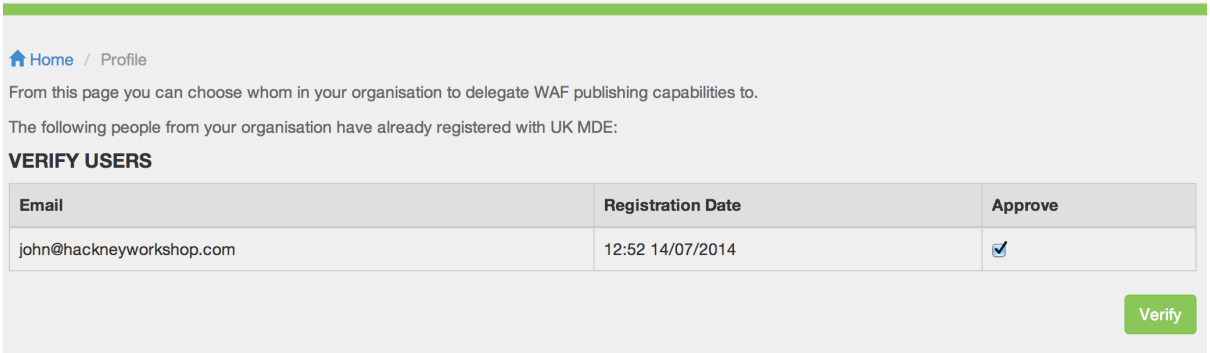
1. John can see that he is unverified on the Home page by the absence of the “Verify Users” button and the disabling of the “Publish To WAF” button.



2. David logs in and clicks “Verify Users”.



2. David finds John in the list, checks the box called "Approve" on the same row as John's email address and then clicks "Verify".

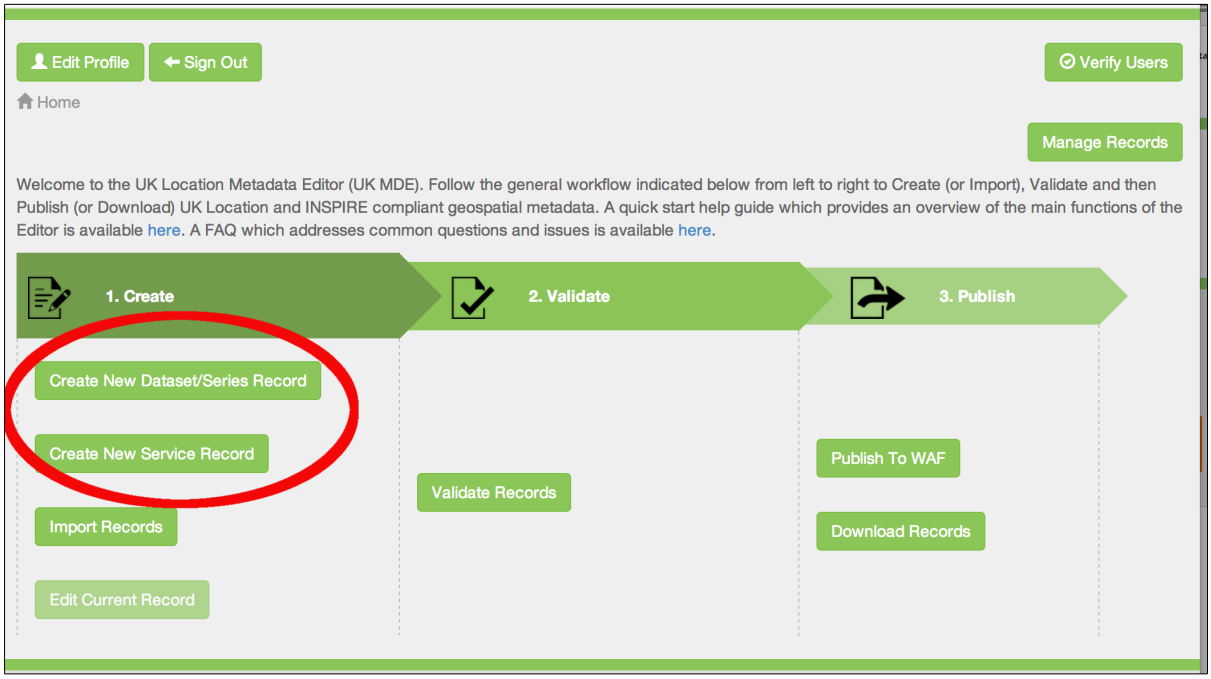


Now John is verified and can publish.

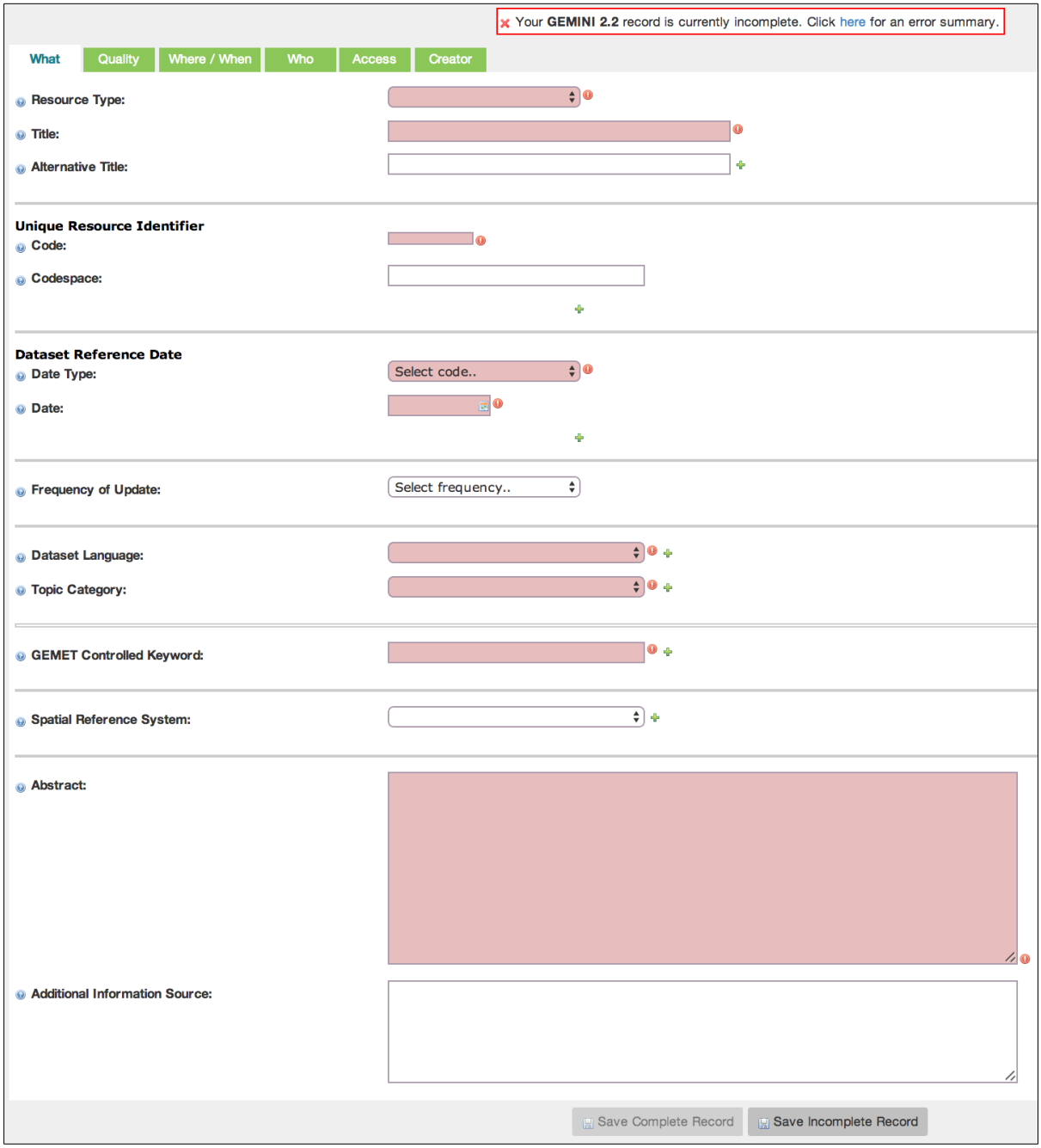
Create Metadata

A metadata record is created from scratch in this example.

1. From the home screen click on "Create New Dataset/Series Record" or "Create Service Record", depending on the type of record you want.



2. The blank form appears:



It is important to be aware that the fields that are not yet satisfactorily "complete" are shaded red and have a red exclamation mark icon next to them. When you start, several fields are in this state, because they are mandatory. In addition, whilst there are two buttons at the bottom of the form for Saving, only one is enabled at a time. Whilst the form there are these fields that are not "complete" then you can only "Save Incomplete Record". Since there are several 'tabs' to this form, to keep track of fields that are "incomplete", see the box at the top saying: "Your GEMINI 2.2 record is currently incomplete. Click here for an error summary." Clicking on "here" shows a summary of all the fields that are incomplete.

When you have filled in these fields (across all tabs) and they are deemed "complete", then all the red shading and icons will have gone and the "Save Complete Record" button will be enabled.

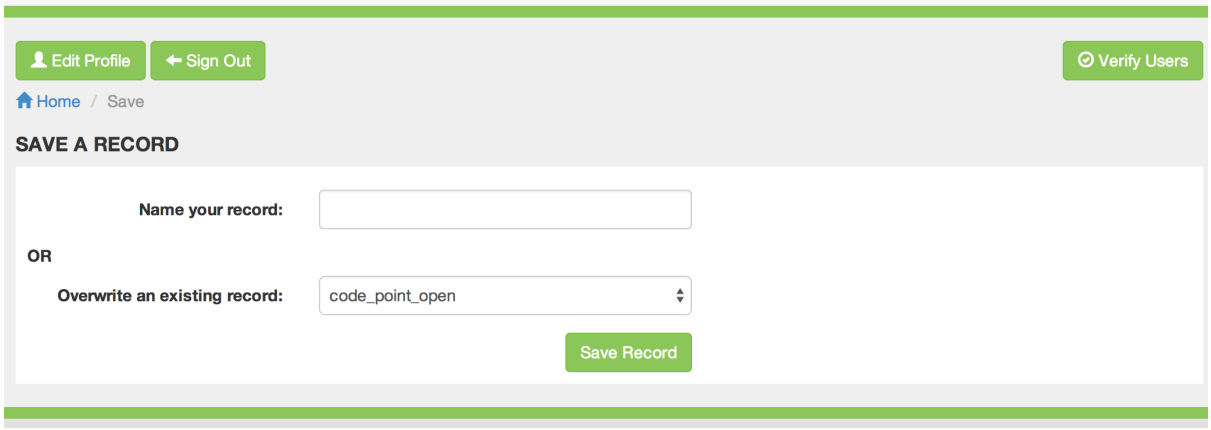
Be sure to "Save" regularly to avoid losing work in the event of a problem with your computer, internet connection or the website.

If you are unsure about what to put in a field, press the "?" icon to its left. That will bring up information about the INSPIRE, GEMINI2 and UK Location guidance in another browser window. (If the help window does not appear then it is probably because your browser has been configured to block pop-ups. In this case, configure your browser to allow pop-ups from this particular website.) Also refer to the "UK GEMINI Encoding Guidance" document, available from http://data.gov.uk/library .

Some fields allow multiple values. These can be added to the form by clicking the green "+" icons near the field. To remove values again, use the "-" icon.

When filling the "Extents of Dataset" field, pressing the "Use Map" button brings up another browser window with the map to select from. If the map window does not appear then it is probably because your browser has been configured to block pop-ups. In this case, configure your browser to allow pop-ups from this particular website.

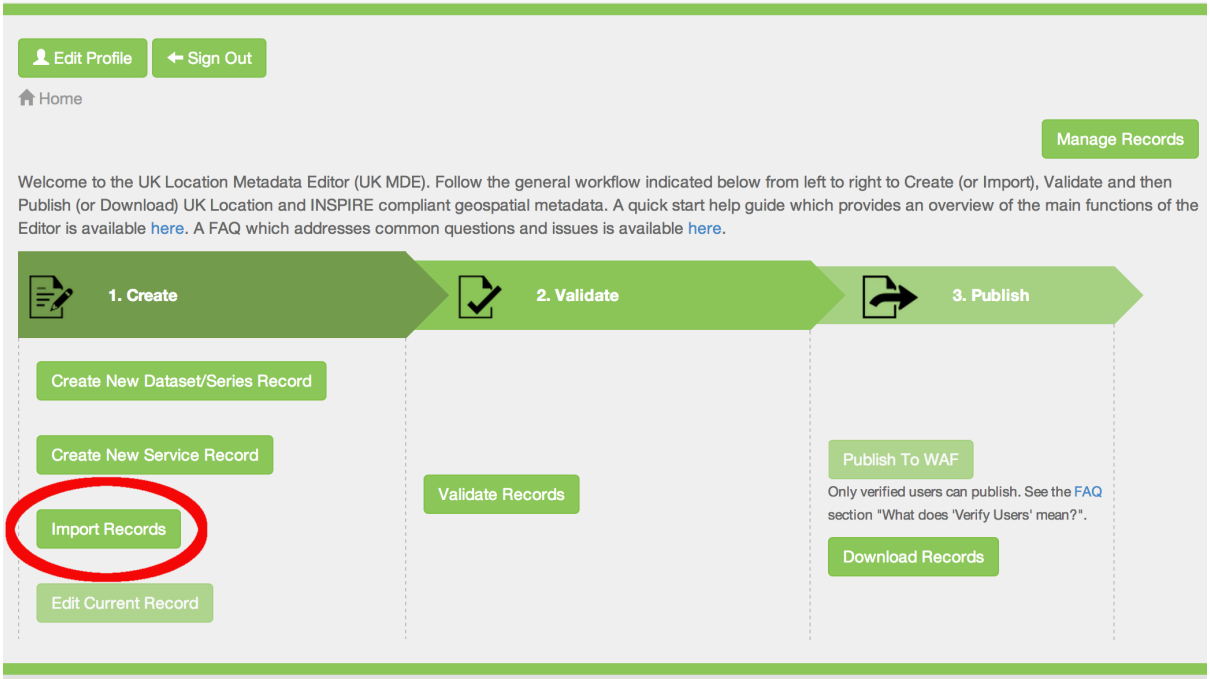
3. When you click "Save" (whether complete or incomplete) it will ask you for the name to save it as in the Metadata Editor. You can also overwrite a previously saved copy of this record or another record. In most cases, you can just click "Save Record" without changing the options.



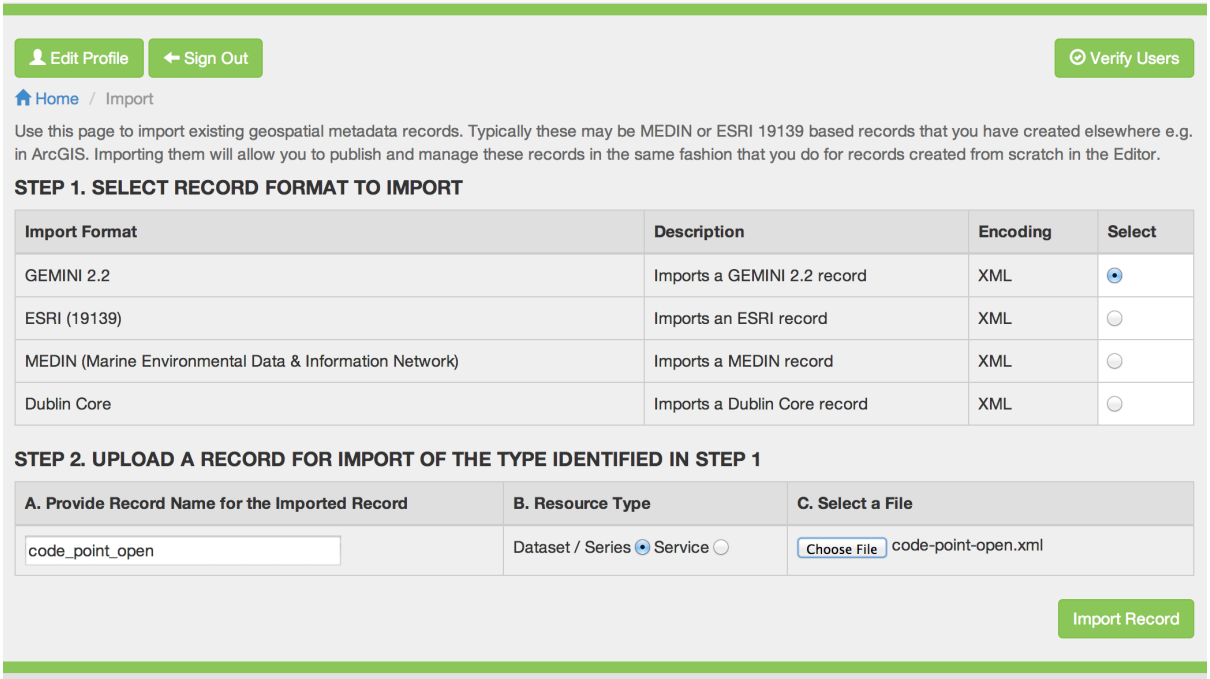
Importing Records

Records can be created in other software, such as ArcGIS. You may want to edit them further, or validate them against for UK Location / INSPIRE, or maybe you just want to publish them using the Metadata Editor.

1. From the Home page, click “Import Records”.



2. The Import page asks for several pieces of information as well as the file.



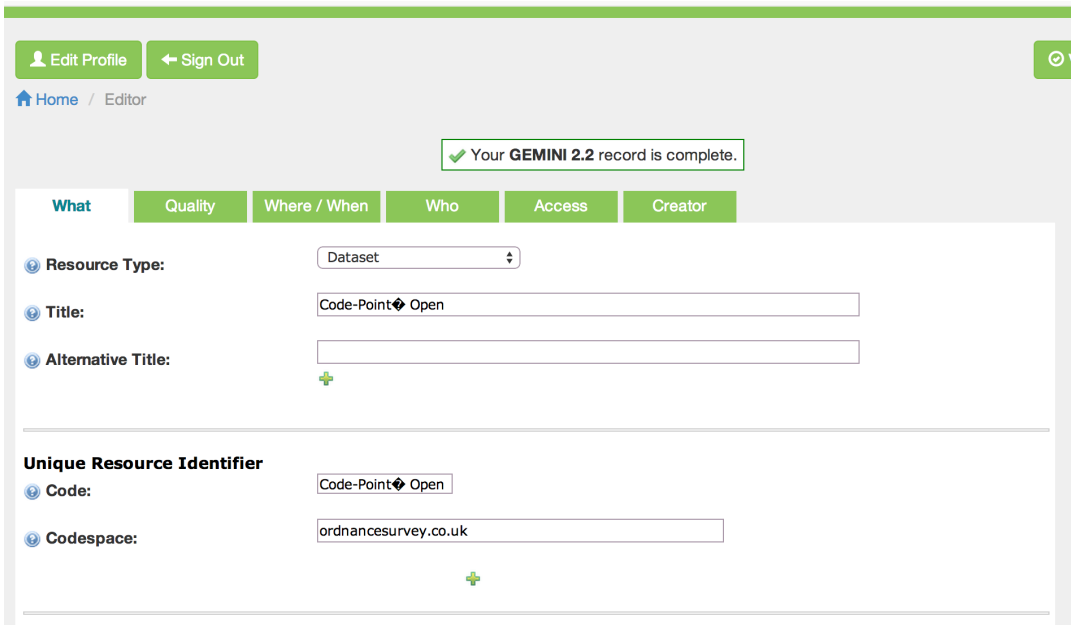
Format: UK Location and data.gov.uk's native format is GEMINI2, but the alternatives are fairly similar so are offered as well. NB Only the INSPIRE fields are paid attention to during import – if non-INSPIRE fields are present then these will not be imported.

Name: Give the record a name to identify it in the Metadata Editor. This is restricted to letters and the symbols "–" and "_". If you put anything else, such as spaces, then the form will be rejected with an error.

Resource Type: Say whether the record is a dataset/series or service, as this affects import.

File: Click "Choose file" to browse to the file on your machine

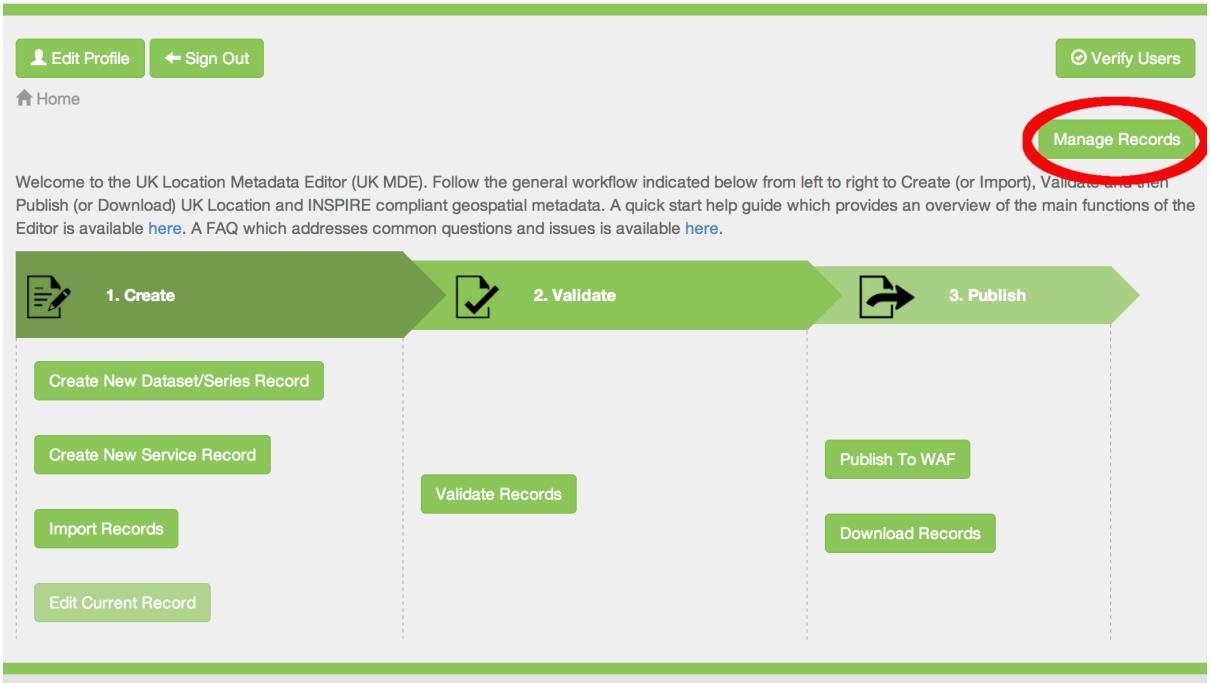
Finally, clicking "Import Record" will upload the file and translate the fields into the Metadata Editor form. This can now be edited and saved, as if you created it from scratch in the Metadata Editor.



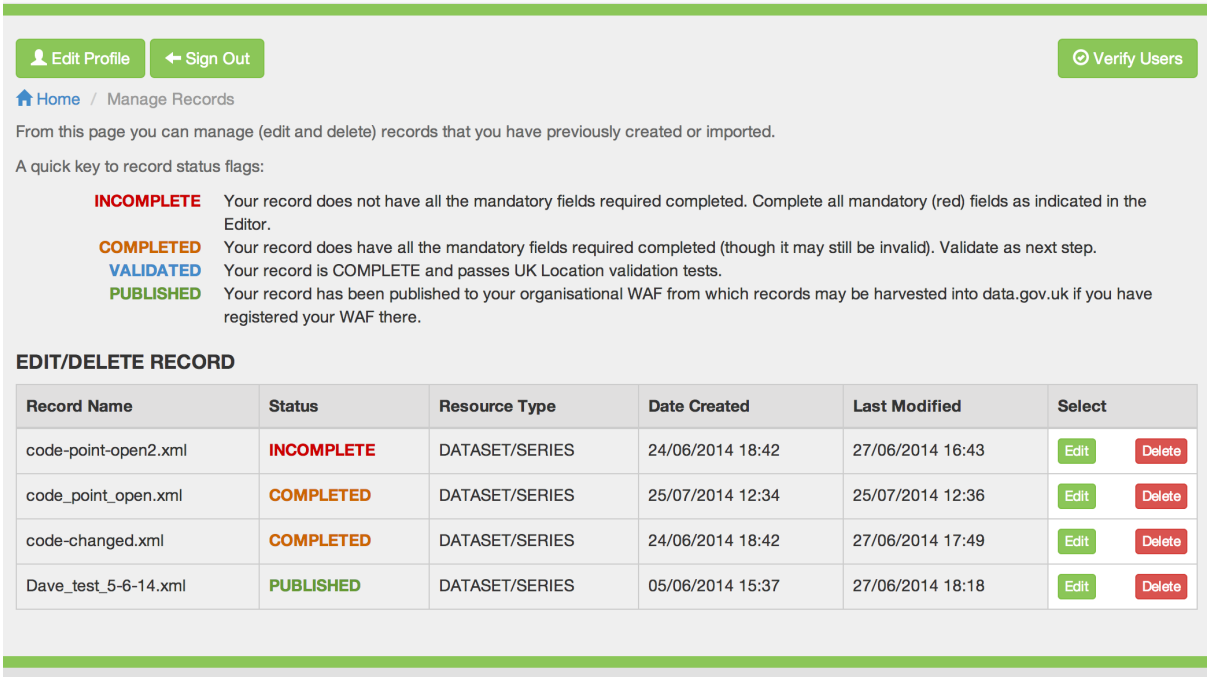
Edit Record

When you have created or imported a record, you may wish to go back and edit it.

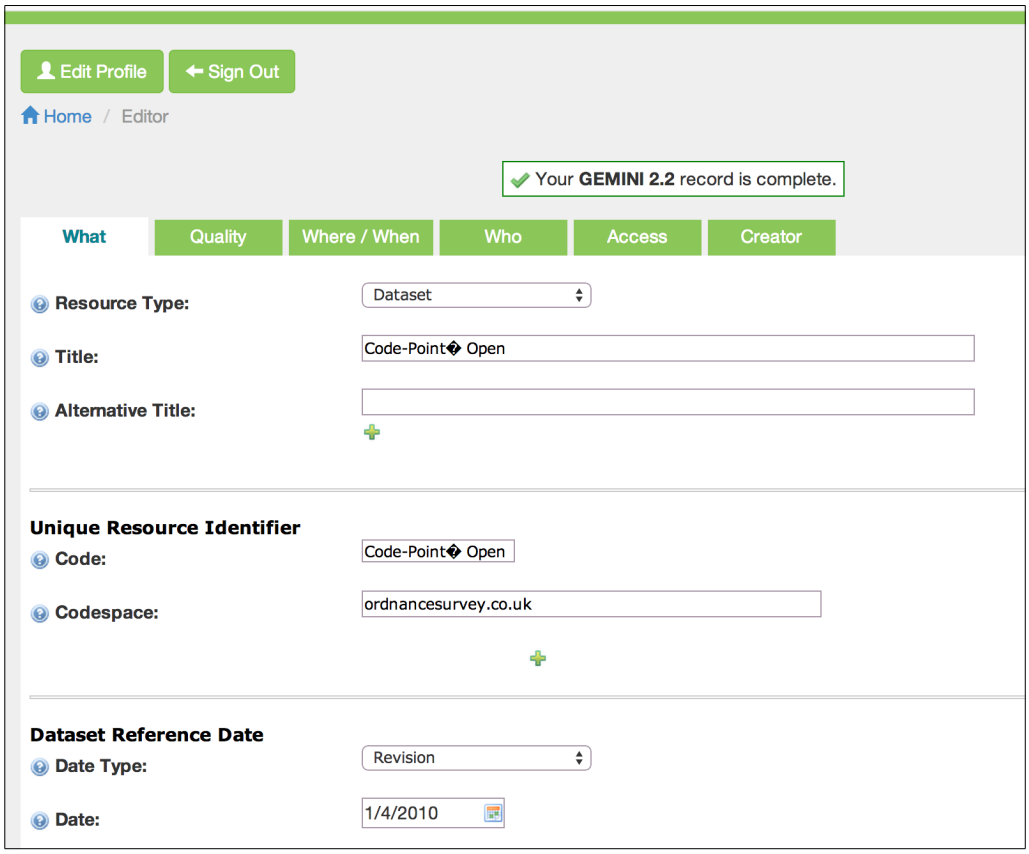
1. From the Home page click "Manage Records".



2. The Manage Records page lists the records in the Metadata Editor and their status.



Find the record you want to edit and click "Edit" for the correct one.



For more information about this edit form, see the section of this document called "Create Record".

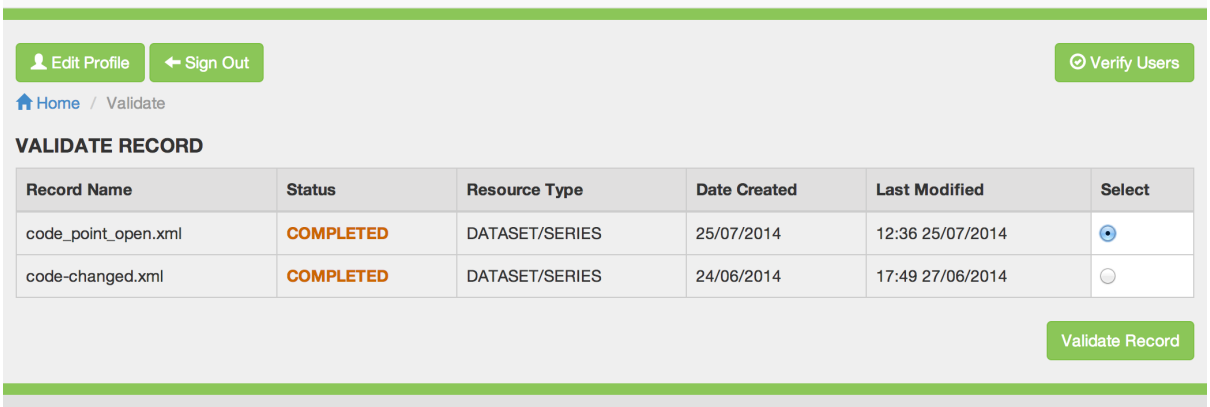
Validation

Once a record has been completed then you need to do the Validation step. This ensures that every field is correctly filled in, according to the GEMINI2. The validation should be the same version as that used in data.gov.uk when harvesting records.

1. From the Home page click Validate Records.

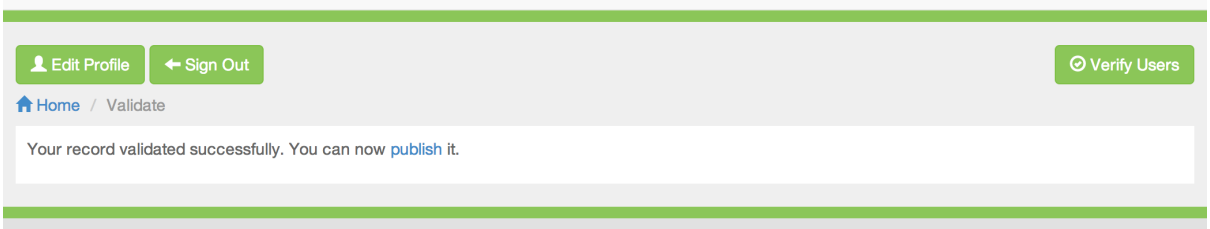


2. The Validate page **only** shows records that are complete and not yet validated. If you can't see you record here then find out its status from the "Manage Records" page (accessed via the Home page).



Select the record you want to validate and then click "Validate Record".

3. Since the form checks itself pretty well, normally the record will validate ok and you'll see this:

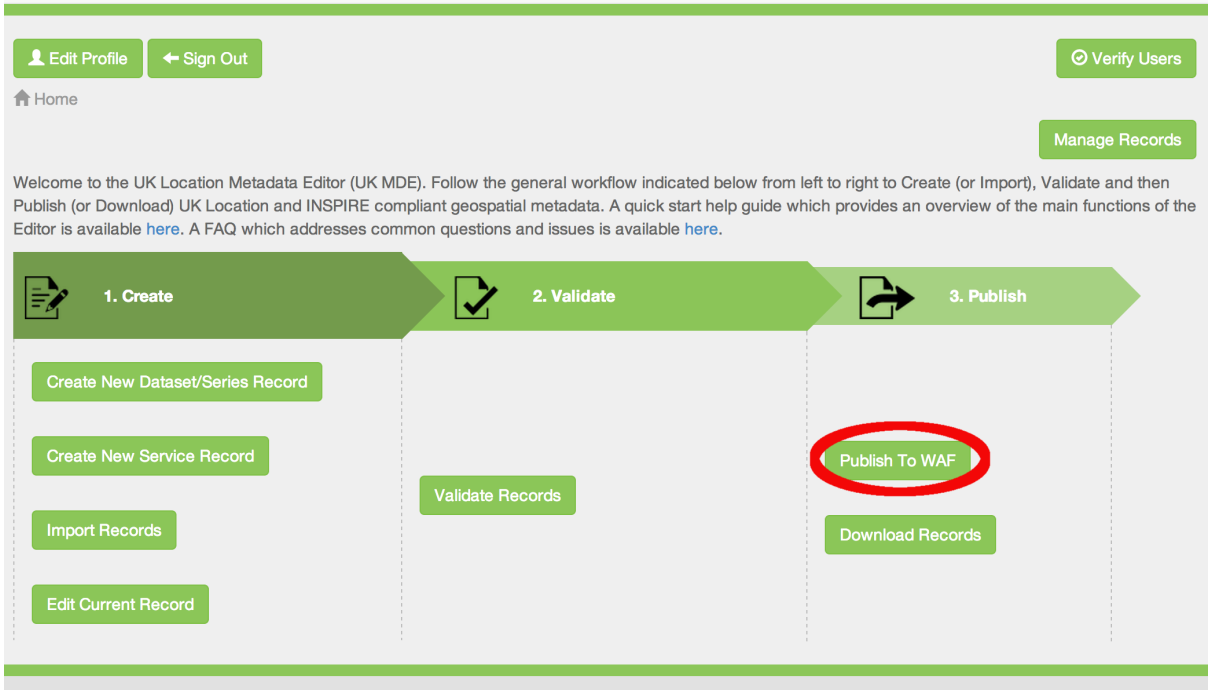


4. You can now click on “Publish” to go to the next stage.

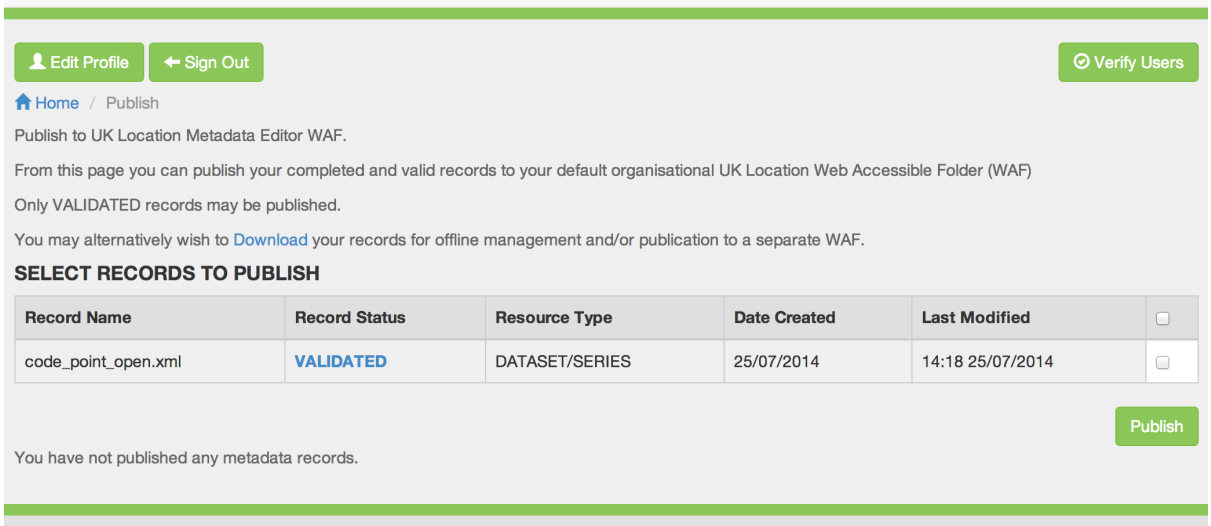
Publish Record

'Publishing' a record means putting it onto the Metadata Editor's WAF for your organisation. Then it can be harvested by data.gov.uk.

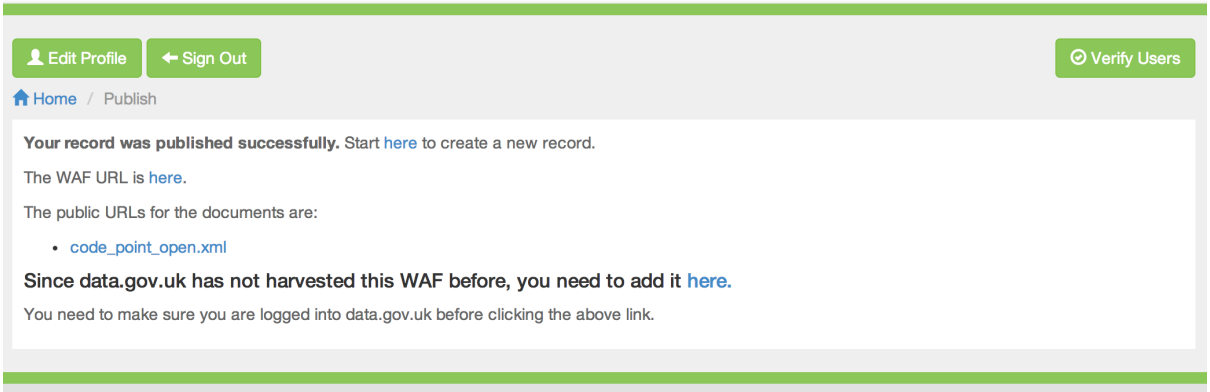
1. From the Home page, click "Publish to WAF". If the button is disabled then you will need to be verified – see the chapter "Verify Users".



2. The Publish page lists records that you can publish and those that you have already published. If your record is not listed then it may not by Complete or Validated – to check the status, go to the Manage Records page (via the Home page).



Click the check-box of the record you want to publish and then click "Publish".



The record is now published to your organization's WAF within the Metadata Editor. The next stage is to harvest it into data.gov.uk.

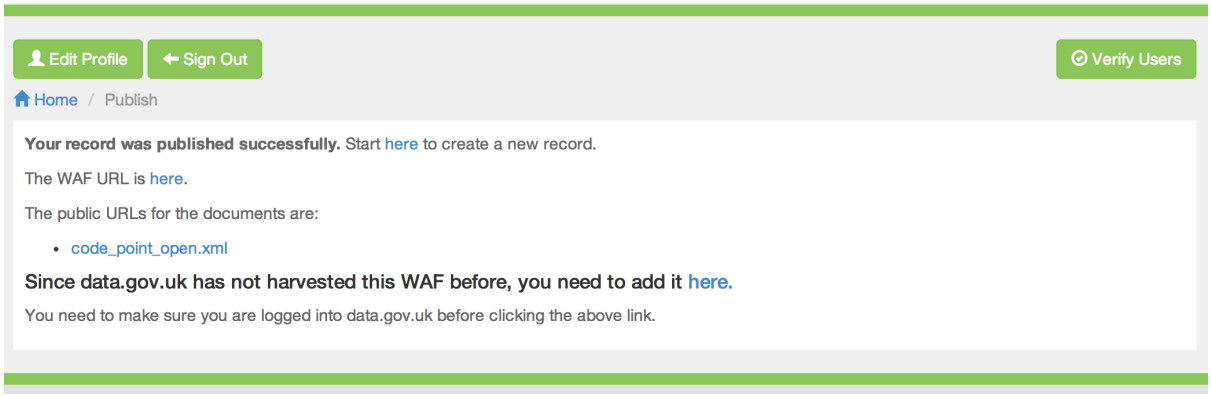
Note the message: "Since data.gov.uk has not harvested this WAF before, you need to add it here." which is telling you that there is no "harvest source" set-up in data.gov.uk to harvest from this WAF.

Harvest

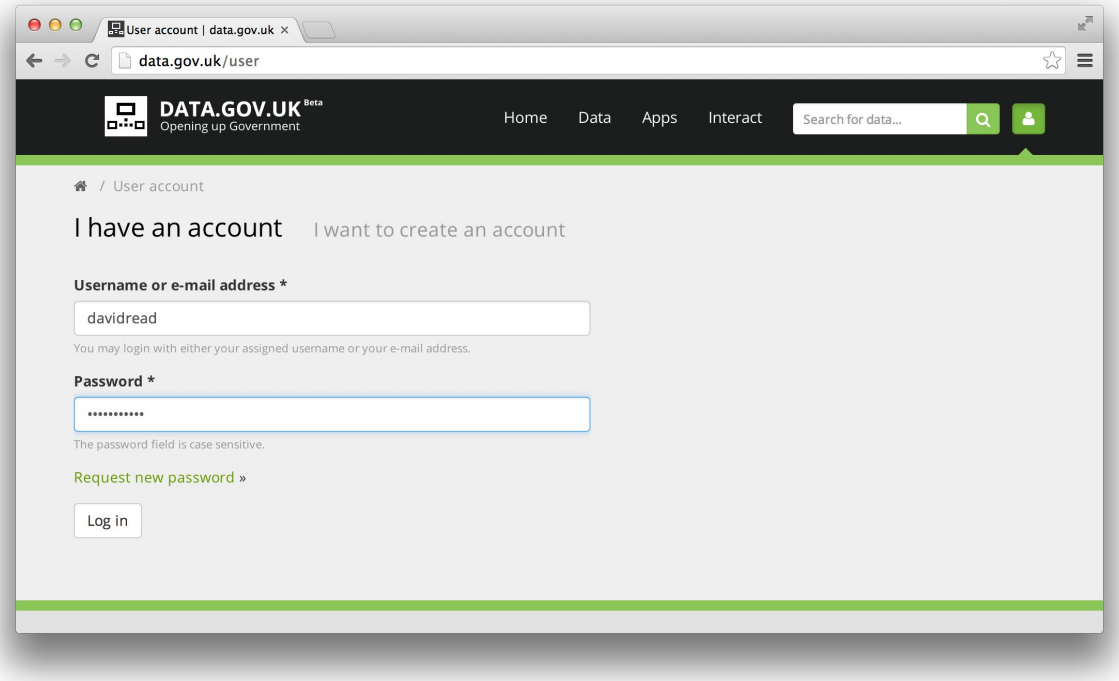
To harvest your published record(s) into data.gov.uk, first there needs to be a 'harvest source' configured and then you 'refresh' it. There are two methods to check and configure a harvest source, depending on whether you have just published a record or not.

Harvest Source configuration—when you've just published a record

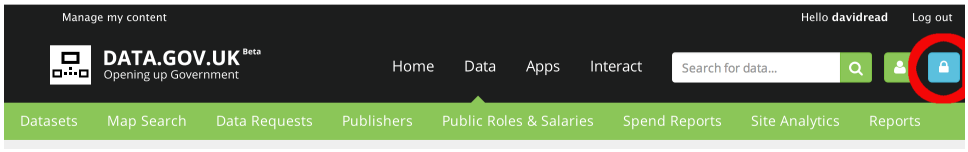
1. Is the harvest source configured? When you publish a record it will warn if it isn't with the message "Since data.gov.uk has not harvested this WAF before, you need to add it here.":



2. Before you click on "here" you need to have logged into data.gov.uk first. Use a new browser window/tab (but it must be the same browser program) to browse to http://data.gov.uk/user and log-in.

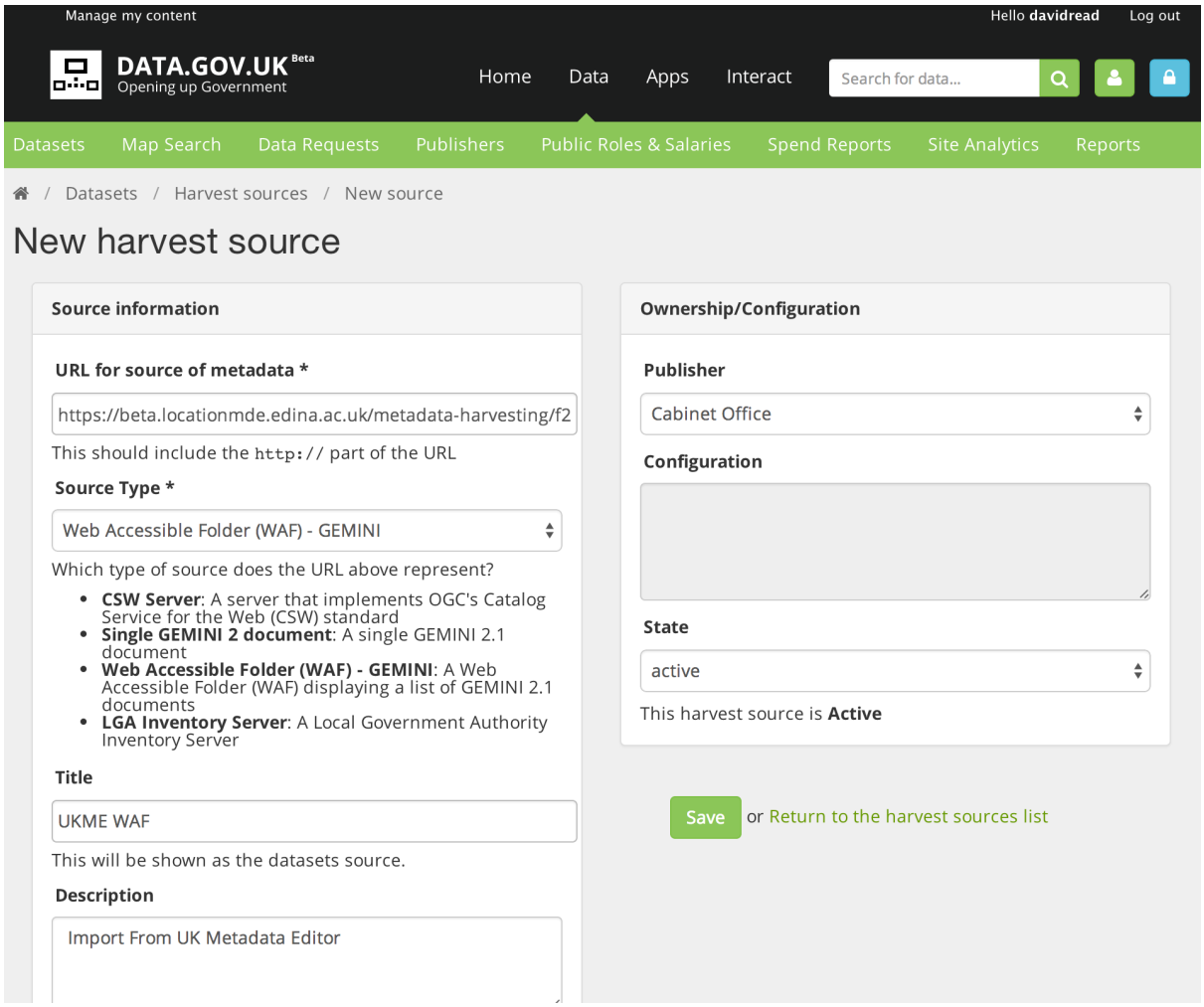


If you have not got an account on data.gov.uk then you'll need to register and then request to be made an 'editor' for your organisation. For more details on this, see the "User Guide for Editors and Administrators" at: http://data.gov.uk/library/user-guide-editors-and-administrators

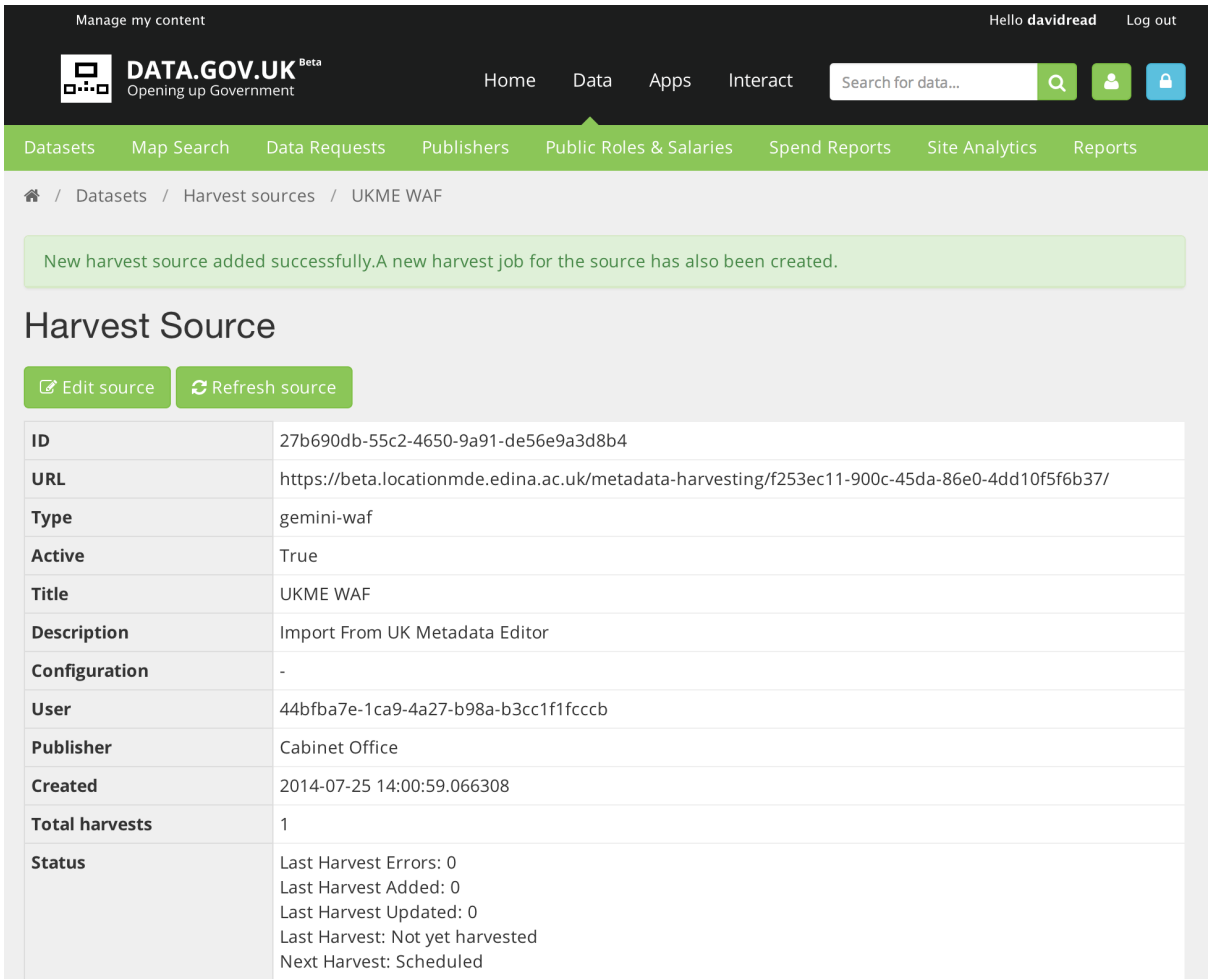


Ensure you see the blue lock icon at the top-right of the data.gov.uk screen. If you don't have this blue lock menu then you have not been made an editor.

3. Switch back to the Metadata Editor browser window/tab and now click on "here" in the sentence "Since data.gov.uk has not harvested this WAF before, you need to add it here". This will show the harvest source configuration form, prefilled.



4. Everything should be set correctly, so just click "Save".



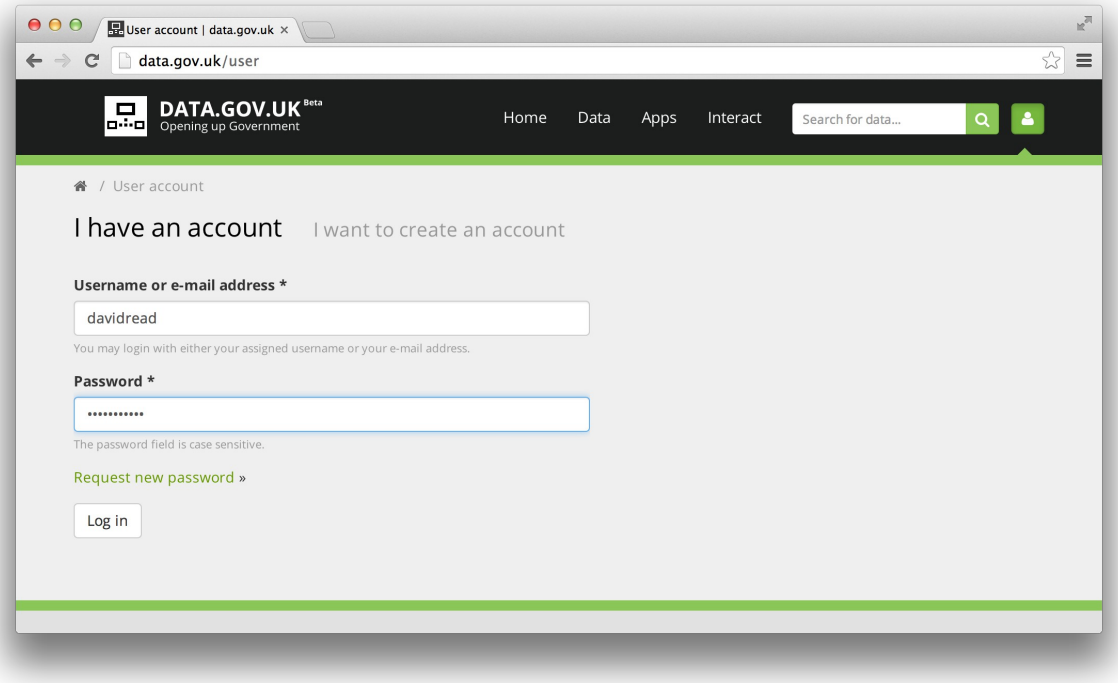
5. Now the harvest source is created, it tells you that it has automatically also created a "harvest job", which means that within 15 minutes it will harvest the records from your WAF. So wait 15 minutes and then load this web-page again to see the changes.

Harvest Source configuration – alternate method

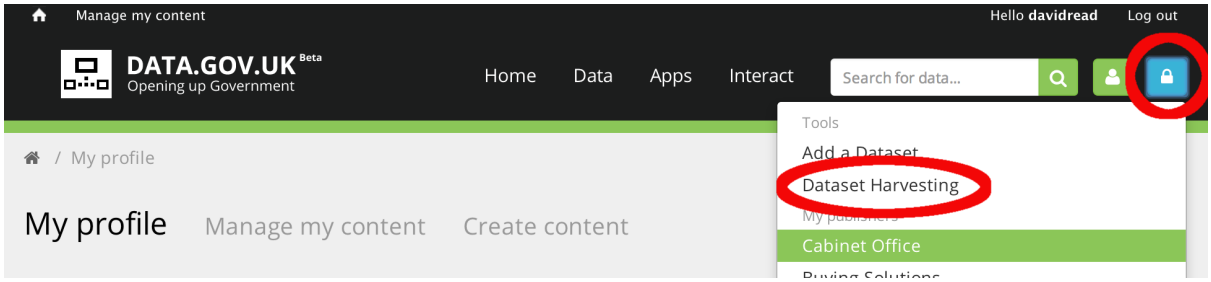
If you do not have the 'just published' web page in front of you, then use this method of configuring a harvest source.

1. Is the harvest source configured? To find out, browse to http://data.gov.uk/harvest and look for your publisher and see if there is a URL for it listed like this: "https://locationmde.data.gov.uk/metadata-harvesting/...". If it isn't there, then you need to create one, as follows.

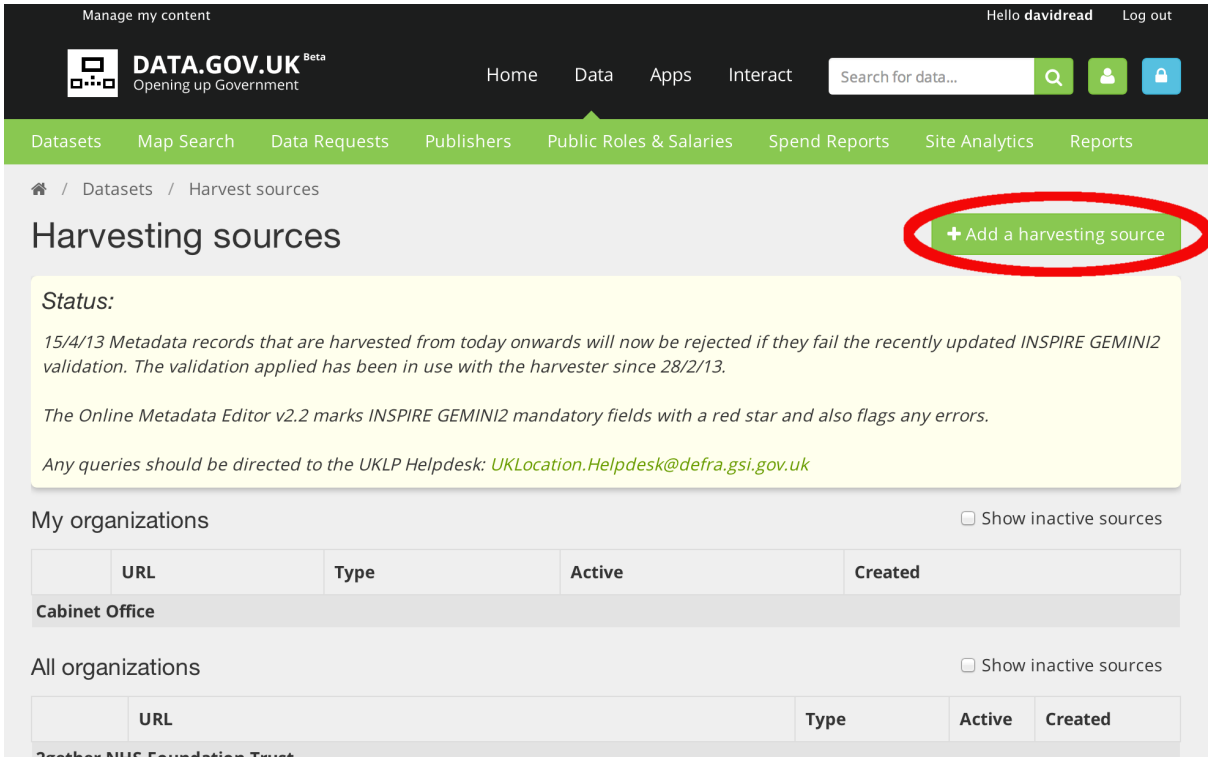
2. Browse to http://data.gov.uk/user and log-in. If you have not got an account on data.gov.uk then you'll need to register and then request to be made an 'editor' for your organisation. For more details on this, see the "User Guide for Editors and Administrators" at: http://data.gov.uk/library/user-guide-editors-and-administrators



3. Click on the blue lock icon at the top-right and then "Dataset Harvesting". (If you don't have this blue lock menu then you have not been made an editor.)



4. Click on "Add a harvesting source".



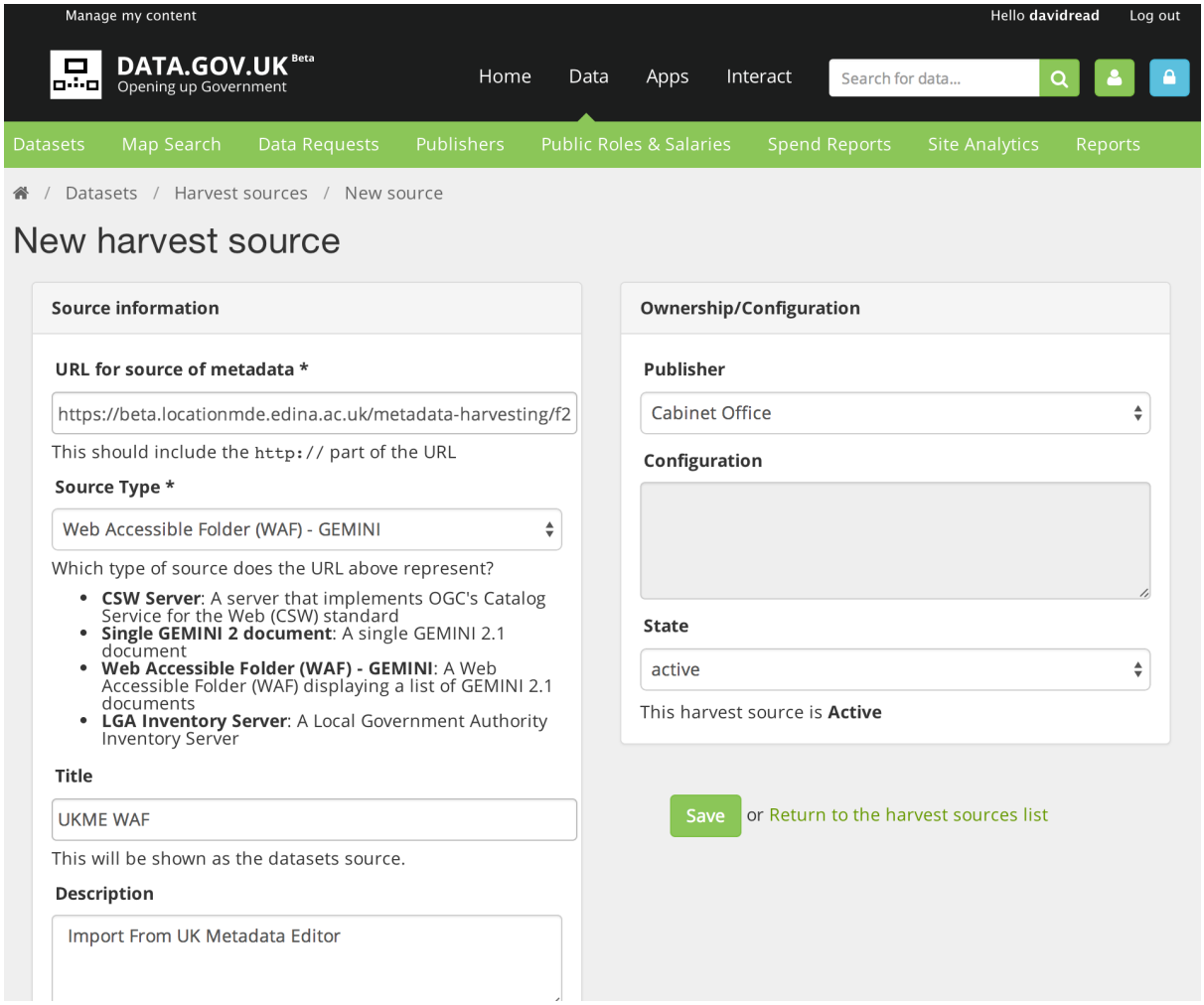
5. Fill in the "New harvest source" form as follows:

- URL for source of metadata – copy and paste the WAF URL from the Metadata Editor publisher page. It will look like this but with a unique code at the end:

`https://locationmde.data.gov.uk/metadata-harvesting/aa1e068a-23da-4563-b9c2-2cad272b463e/`

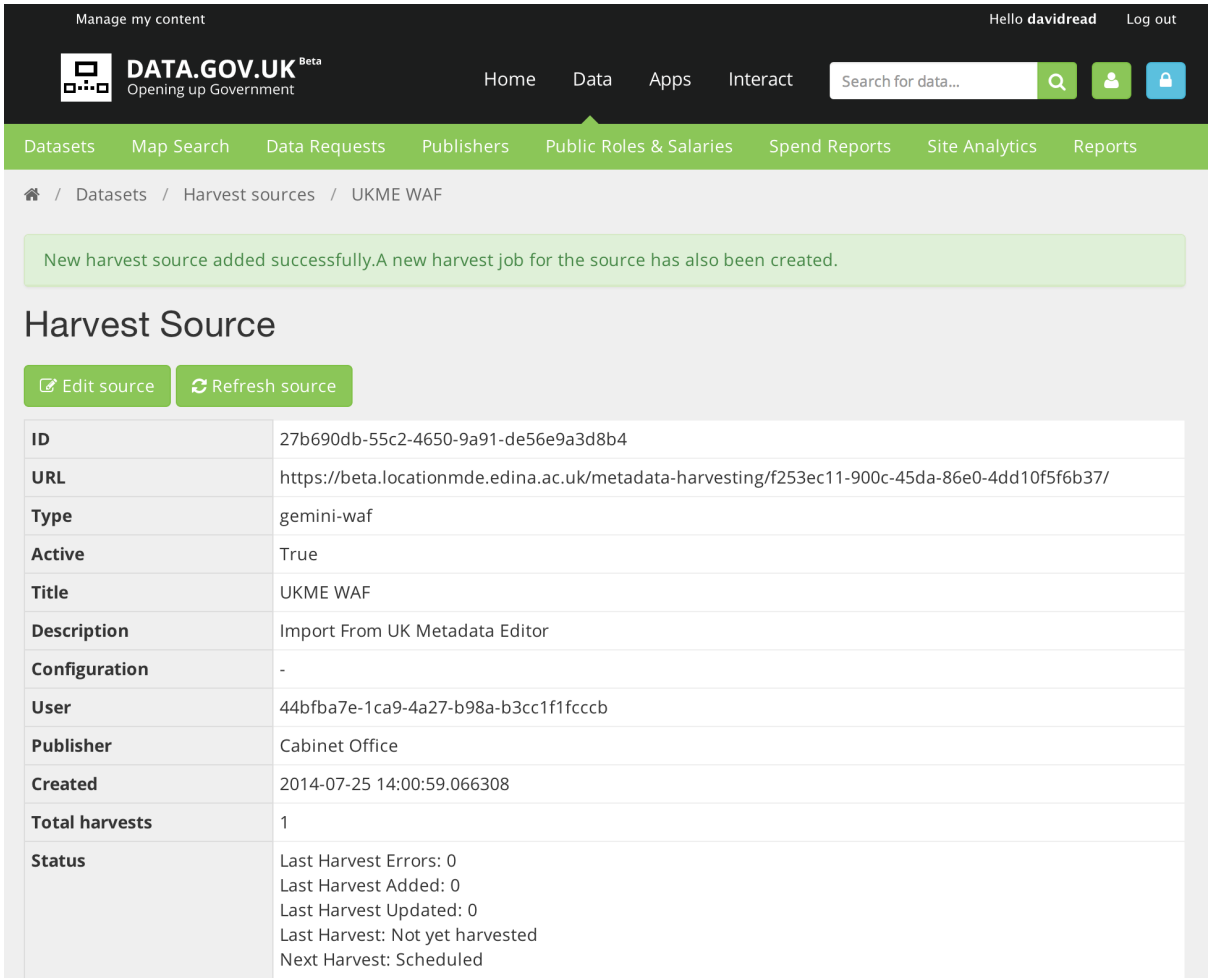
- Source Type – Web Accessible Folder (WAF) – GEMINI2
- Publisher – your organization. You may be editor for several, so choose the one associated with your Metadata Editor user account.

The Title and Description fields are optional.



Now click "Save".

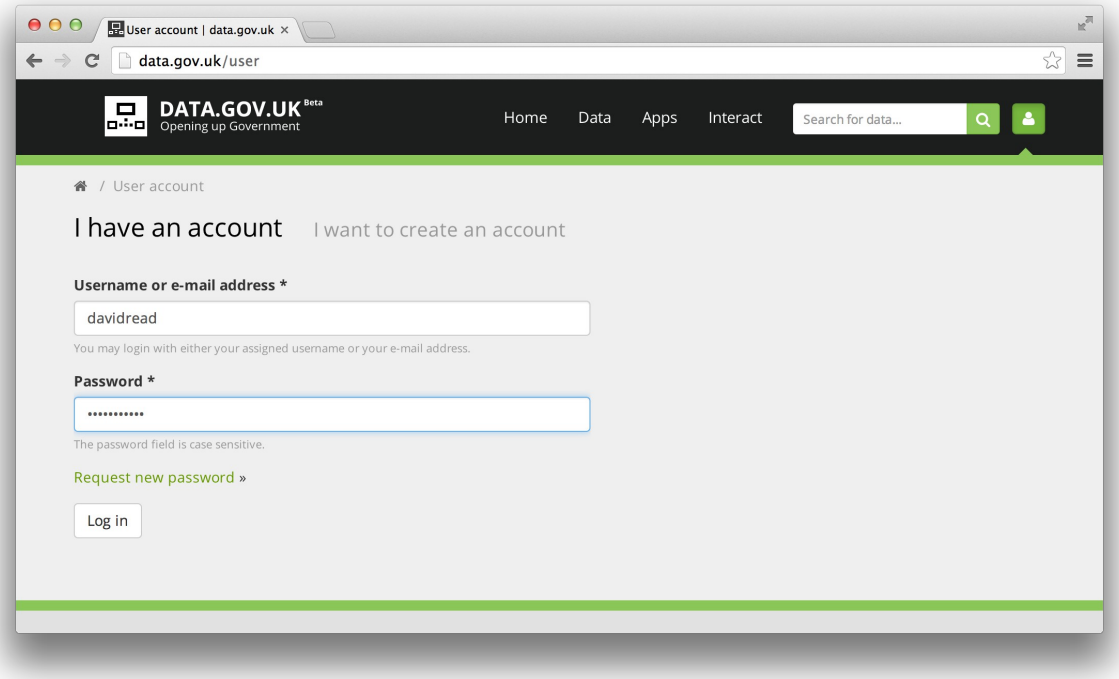
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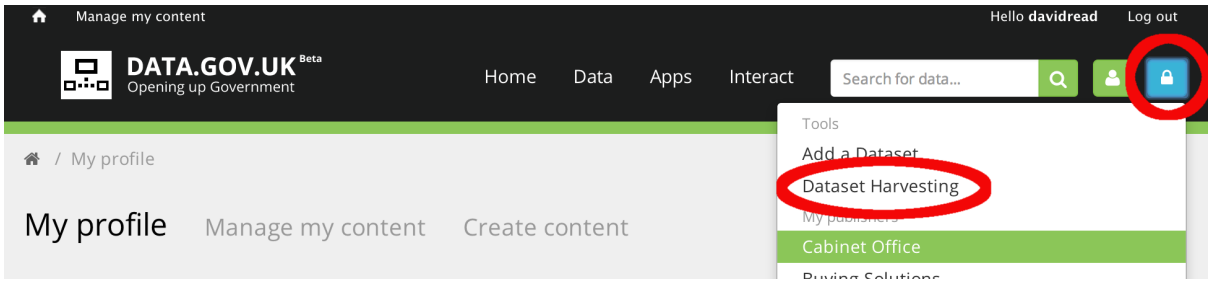
Harvesting into data.gov.uk

When a harvest source is first configured, a harvest takes place automatically – see the previous sections. Then to initiate subsequent harvests, you need to log-in to data.gov.uk and "Refresh" the harvest source.

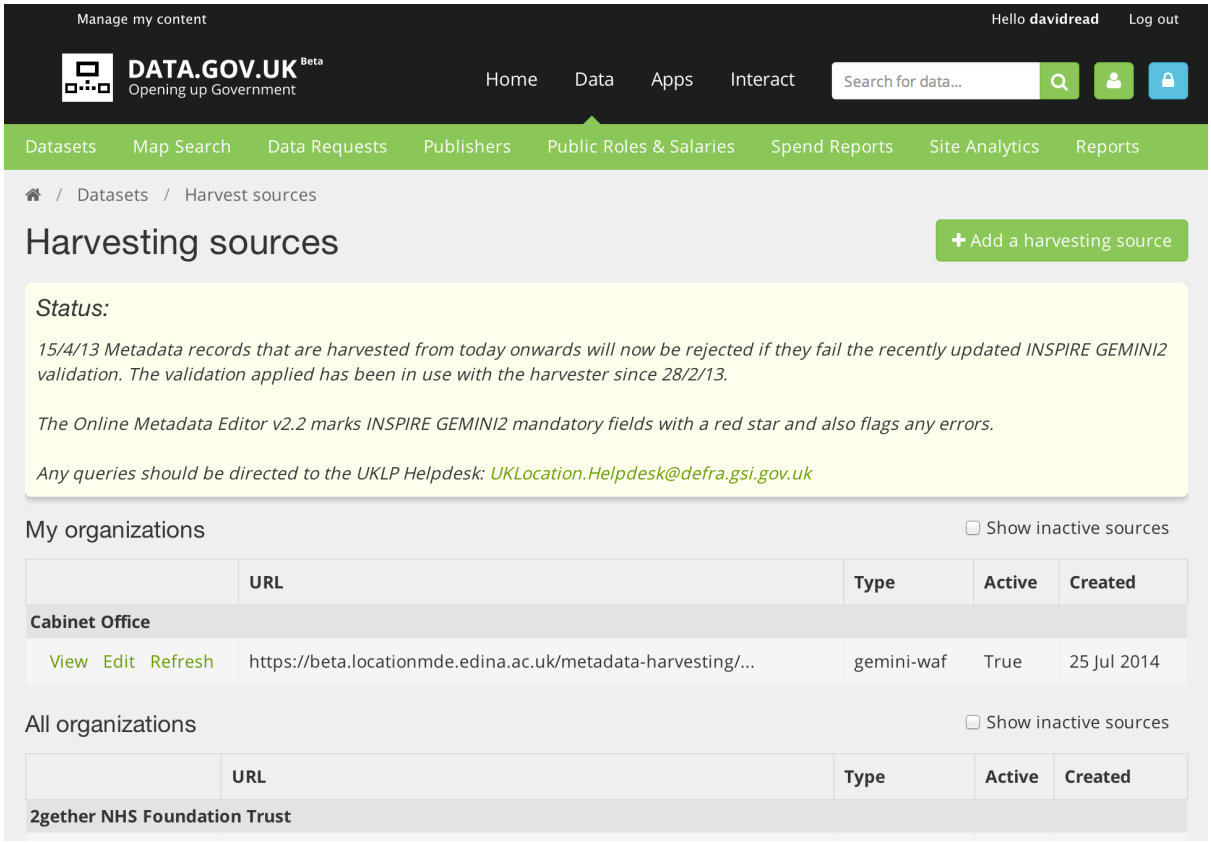
1. Log-in to data.gov.uk.



2. Click on the blue lock icon at the top-right and then "Dataset Harvesting". (If you don't have this blue lock menu then you have not been made an editor.)



3. Click "Refresh" for the harvest source relating to your publisher's WAF.



4. Wait 15 minutes and then click View on the harvest source page to see the results.

Support

For questions and help for the Metadata Editor, contact the INSPIRE Helpdesk:

UK-INSPIRE-Help@defra.gsi.gov.uk

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