
RGDW METADATA USER MANUAL FOR ARCGIS PRO

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SANGIS

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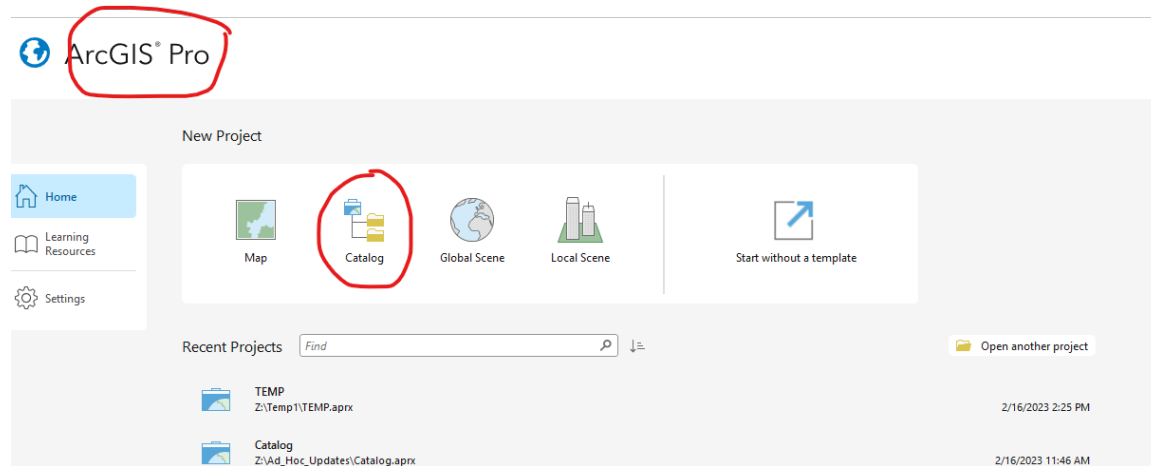
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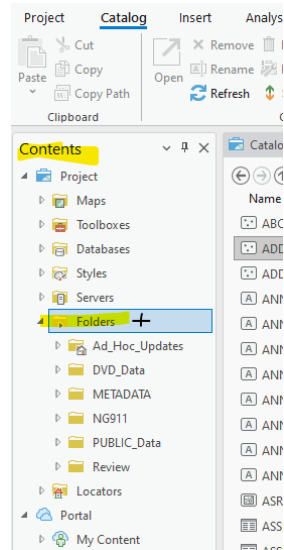
Section 1. RGDW Metadata in Pro

1. Getting Started

Open ArcPro. It is recommended to create a “New Project” with Catalog view (see screenshot below), but it is also easy to edit Metadata from existing map documents (.aprx).

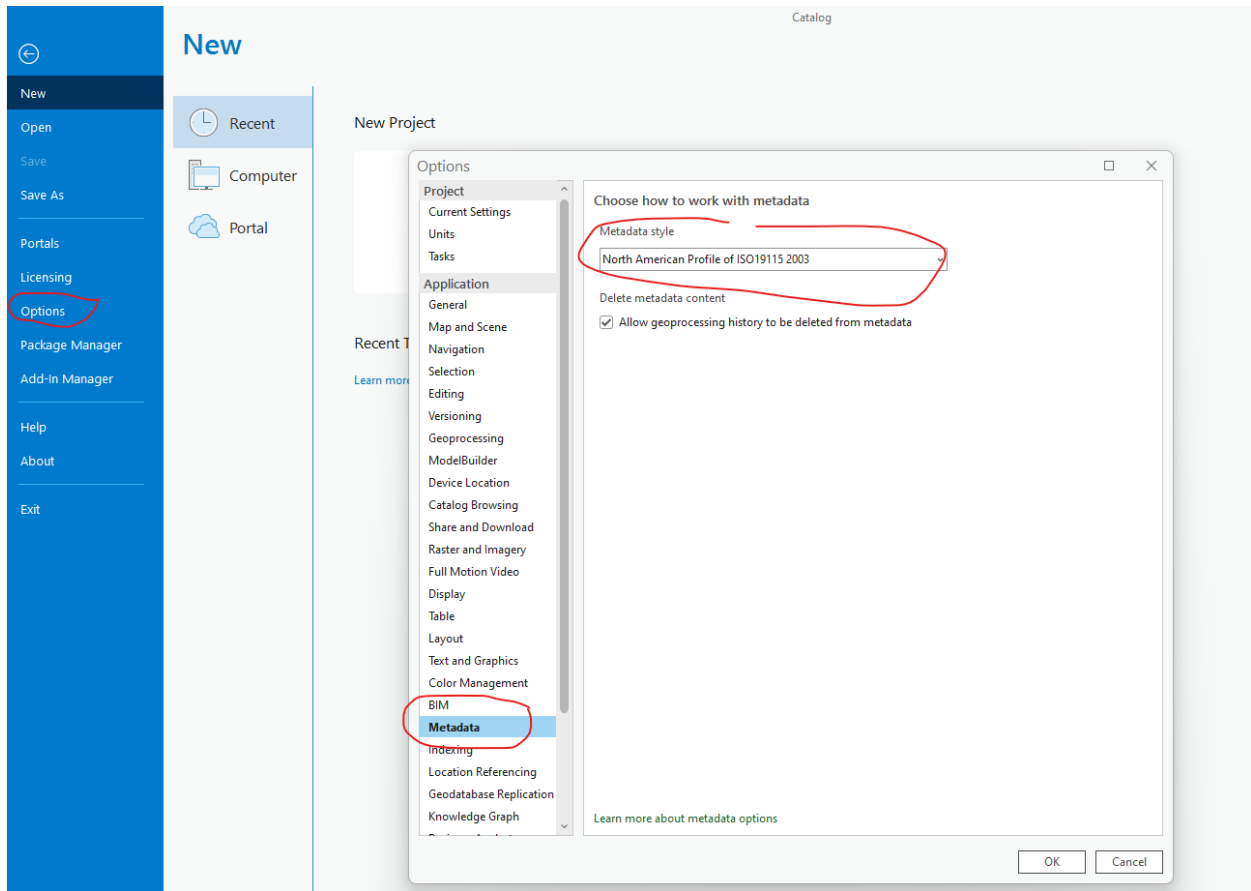


It is recommended to add Folder connection(s) (on the Contents Pane) to the folders where your data resides.

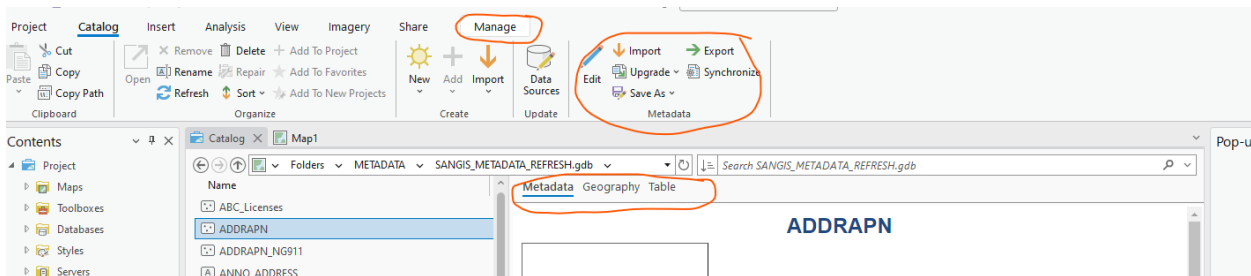


You can configure the Metadata style by going to Project > Options > Metadata. Make sure it is not set to Item Description as it is too limited. If you do not have the SanGIS Metadata Editor

installed (needs Pro 3.0 and above), ISO 19139 Metadata Implementation Specification is recommended if not using the RGDW Metadata style.

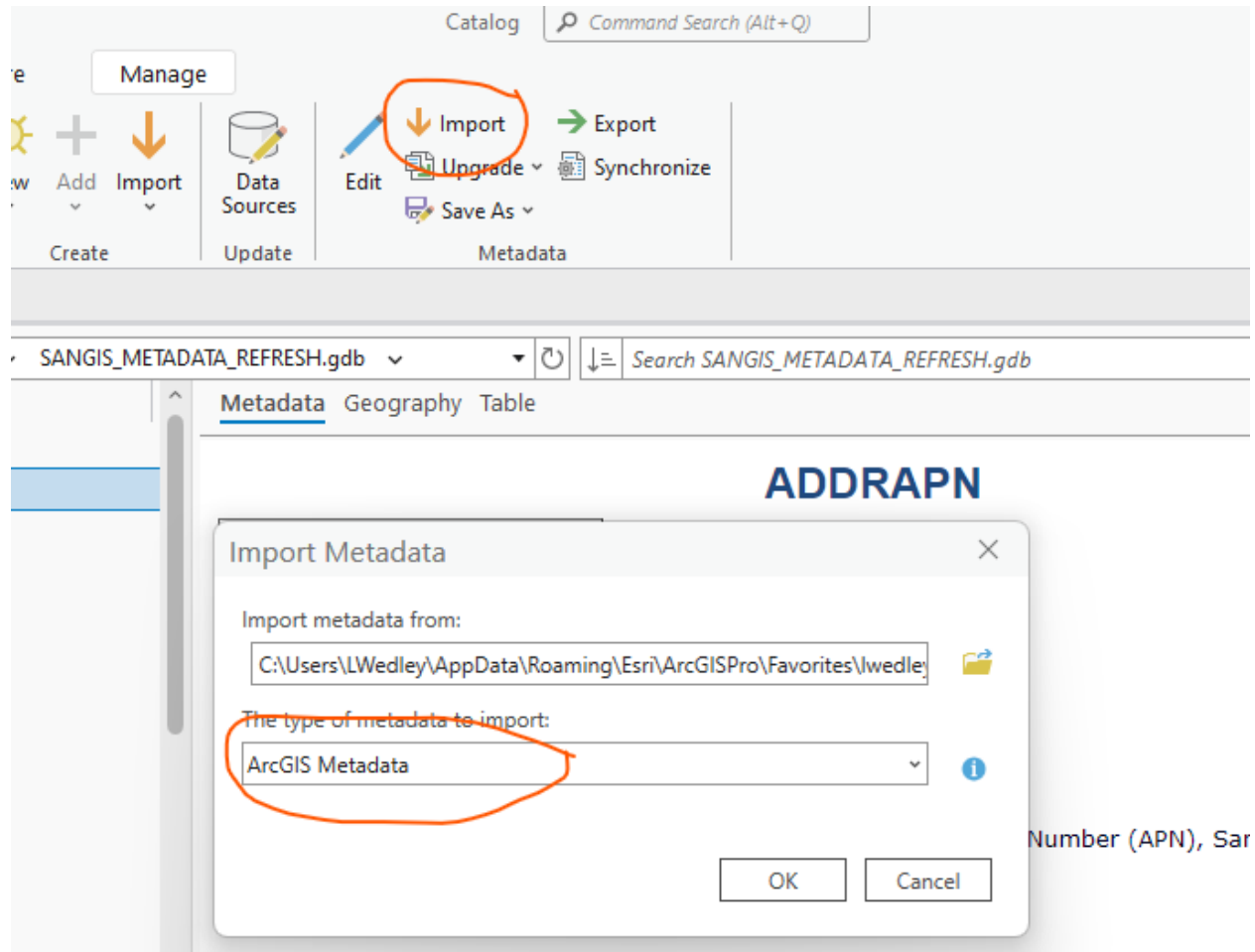


Browse to your folder or FGDB on the Contents Pane, select the layer you want to edit the metadata for on the Catalog pane, go to the Catalog Pane, Metadata group to edit your metadata.



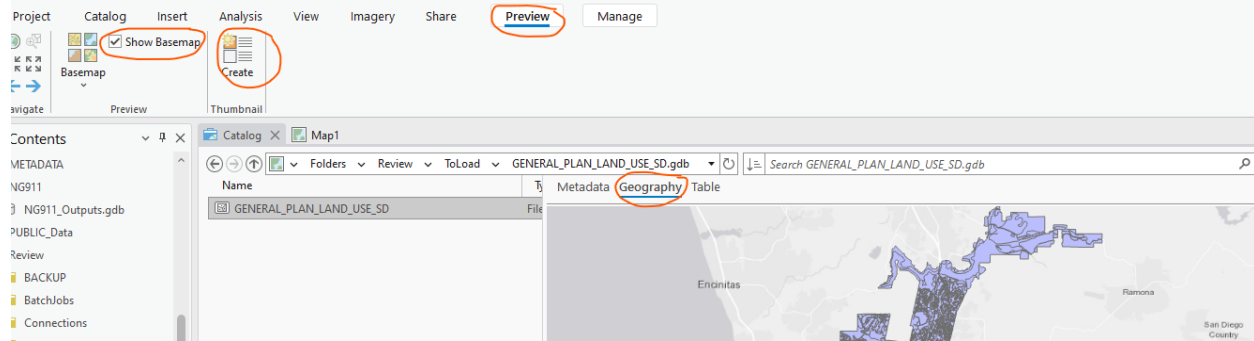
2. Importing Metadata

If you have metadata in another layer that you want to import into your layer as a starting point use the Import Button on the Metadata tab (see screenshot below) and make sure to select “ArcGIS Metadata” as the type of metadata to import.



3. Create Thumbnail

When you go to the Geography tab of your Metadata, a Preview tab should appear beside Manage on the Menu Ribbon. Click on this, zoom/ move to the desired area, you can include or exclude a basemap, then click Create.



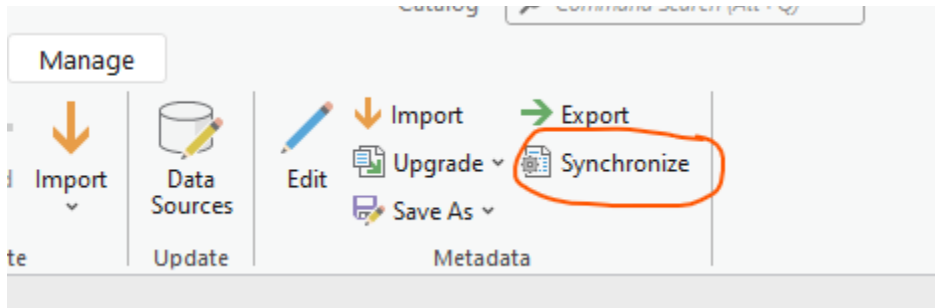
When you go back to the Metadata tab from Geography the new thumbnail should appear.

4. View Metadata

How the metadata looks on the Metadata tab depends on the Metadata style you selected earlier under Project > Options. However, for editing purposes all tabs are exposed for all of the full metadata styles (unless you have selected Item Description). If you set the Metadata Style to “SanGIS Metadata Editor” the metadata will only contain the Metadata Elements required by the RGDW Metadata Standard listed as follows:

- Thumbnail
- Tags
- Summary
- Description
- Credits
- Use Limitation
- Extent (this should be auto populated by ArcGIS)
- Number of Records (this should be auto populated by ArcGIS)
- Publication Date
- Date of Data (Temporal Period Extent)
- Topics and Keywords
- Resource Details (Status, Type, Update Frequency)
- Spatial Reference System (this should be auto populated by ArcGIS)
- Contacts: Point of Contact (Name, Organization, Address, Position, email, Telephone number) AND Distributor (Name, Organization, Address, Role, email, Telephone number). Point of Contact is normally the data provider, whereas Distributor is normally SanGIS if the data is provided on the Regional Data Warehouse for the general public.
- Distribution Ordering Instructions
- Fields: Overview
- Fields: Citation
- Fields: Definition and Definition Source must be completed for all fields. Label, Alias, Type and other field values should be auto populated by ArcGIS)

Use the Synchronize button to make sure system elements are updated/populated (e.g. number of records, Extent, Spatial Reference System, Field schema information).



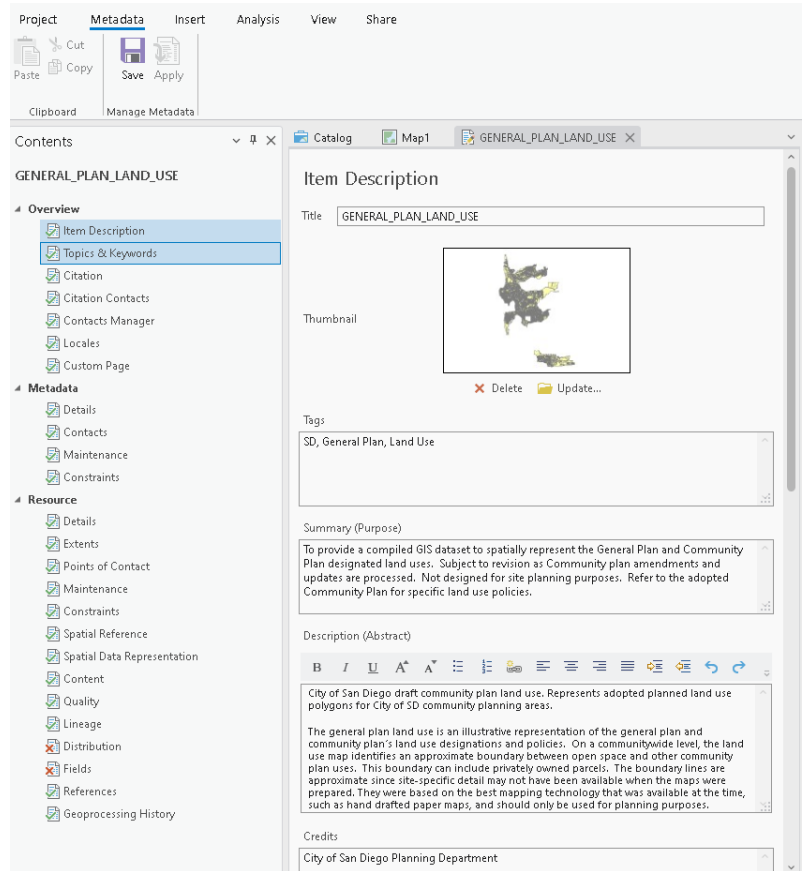
Key Tip: Sometimes changes such as Thumbnail, Number of Records and Extent don't update immediately. Using the synchronize button or should fix this.

Section 2: Editing Metadata to Conform with SanGIS Metadata Standard (RGDW)

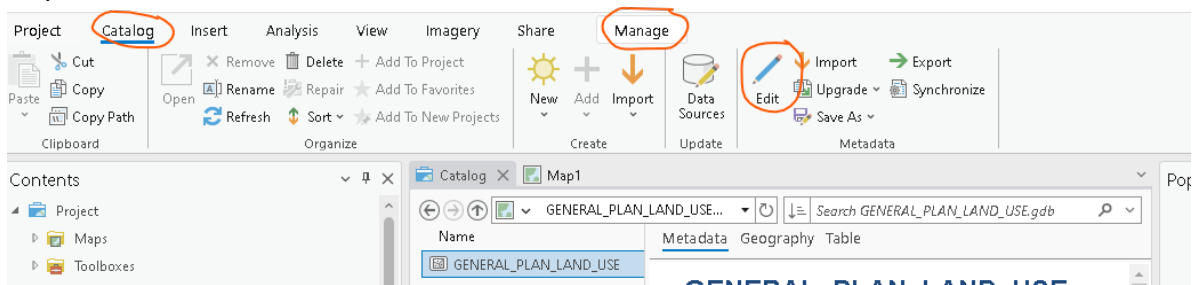
1. Editing

Note, the RGDW Metadata Stylesheet only displays in view environment so you can follow these editing instructions with any of the 'full' Metadata Styles selected (set under ArcGIS Pro Project > Options > Metadata). When you go to edit metadata, all ArcGIS Metadata elements will display but you will only need to edit specific elements as detailed below.

To start editing, browse to the layer you want to edit metadata for, Click on Catalog on the Ribbon, then Manage, and click Edit in the Metadata Group (see screenshot below). Make sure you have selected the layer for which you want to edit metadata.

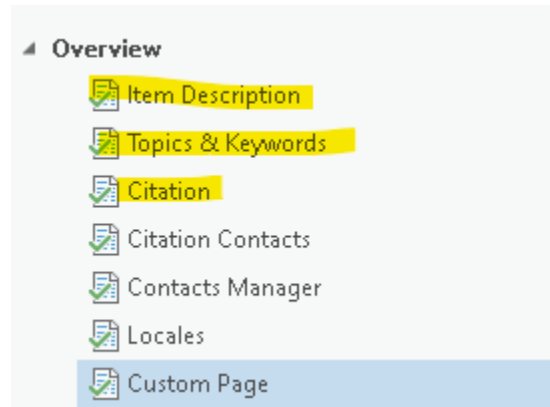


Metadata is managed through 3 larger sections: Overview, Metadata and Resource. The required elements within each of these sections is detailed below.



2. Overview

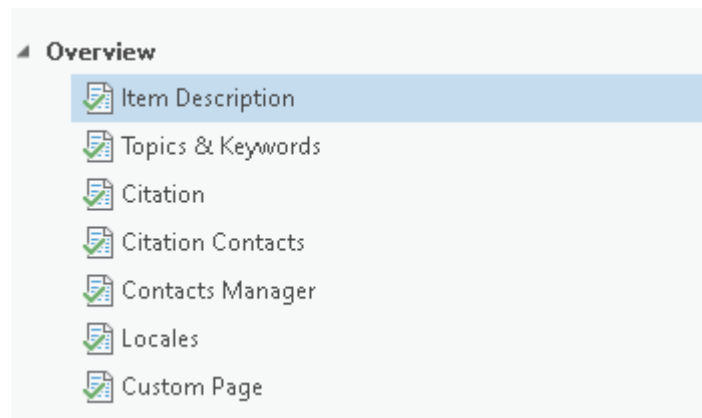
Required elements are located under Item Description, Topics & Keywords and Citation only. Other tabs can be ignored (Citation Contacts, Contacts Manager, Locales, Custom Page).



Item Description

Item Description items should be completed as follows:

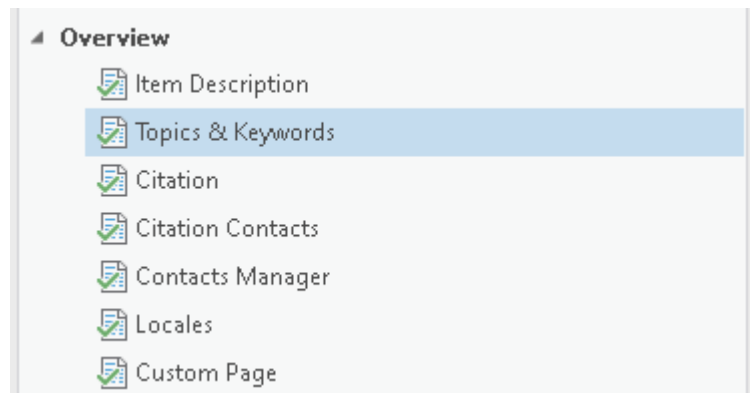
- Title
- Thumbnail
- Tags
- Summary (Purpose)
- Description (Abstract)
- Credits
- Use Limitation



Topics & Keywords

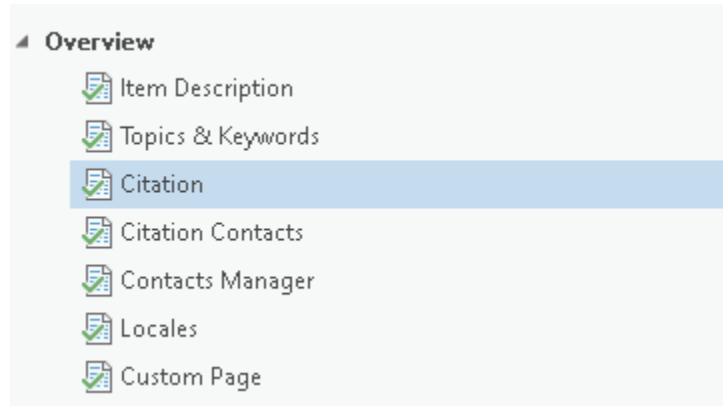
Tick appropriate Topic Categories and select correct Content Type

Add Theme Keywords and Place Keywords



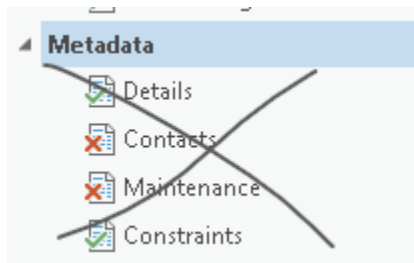
Citation

Dates > Published Date must be completed.



3. Metadata

None of the items under this section need to be completed.

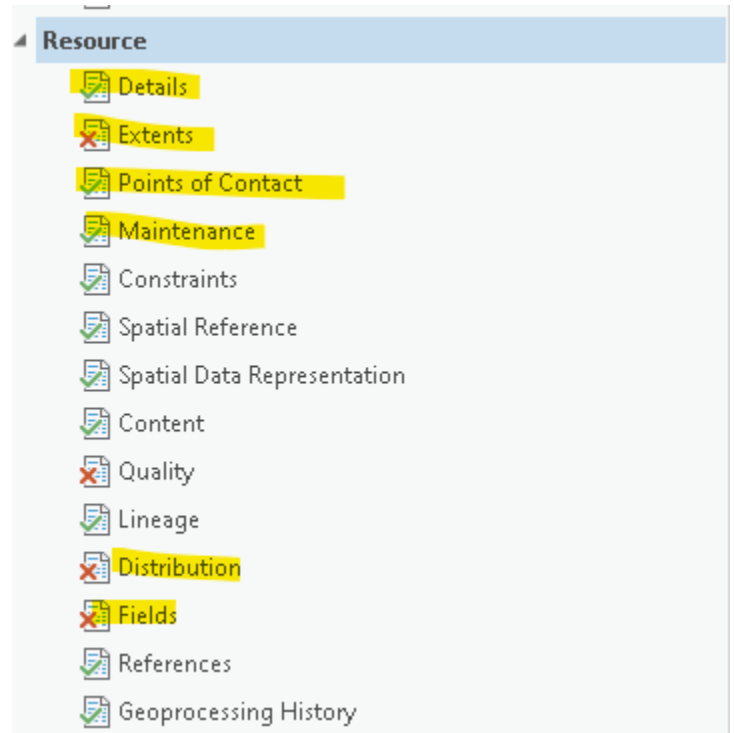


4. Resource

Items need to be completed under the following sub-sections under Resource and are detailed further below:

- Details
- Extents
- Point of Contact
- Maintenance
- Distribution
- Fields

Other sub-sections can be ignored.



Details

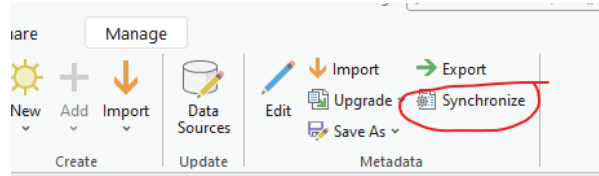
Status: Select appropriate one from list.

Credit: Will be automatically completed based on the Credit completed under Overview.

Extents

Description and Temporal Instant Extent must be completed. The Temporal Instant Extent is the date of the data.

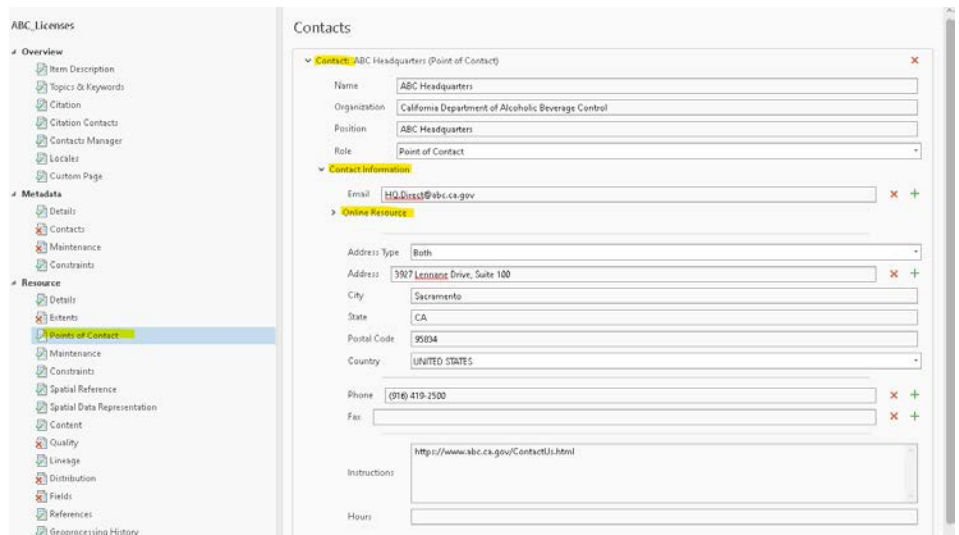
The bounding box should be automated by the software (check that it appears when you synchronize metadata at the end).



Point of Contact

Multiple elements for the Point of Contact (i.e., the data source) must be completed as follows:

- Name
- Organization
- Position
- Role (select Point of Contact)
- Contact Information > Email
- Address Type
- Address
- City
- State
- Postal Code
- Country
- Phone



Maintenance

Complete Update Frequency

Spatial Reference

This should be automatically populated by the software.

Distribution

Distributor

If the data is shared on the SanGIS Public Data Warehouse, the Distributor is normally set as SanGIS. Multiple elements must be completed under Distributor as follows:

- Name
- Organization

- Position
- Role
- Contact Information > Email

Contact Information > Address Type

- Contact Information > Address
- Contact Information > City
- Contact Information > State
- Contact Information > Postal Code
- Contact Information > Country
- Contact Information > Phone
- Contact Information > Fax

▼ Contact: Data Librarian (Distributor) ✕

Name

Organization

Position

Role

▼ Contact Information

Email ✕ +

➤ Online Resource

Address Type

Address ✕ +

City

State

Postal Code

Country

Phone ✕ +

Fax ✕ +

Instructions

Hours

- Ordering Process > Ordering Instructions

▼ Ordering Process (Available Time Period) ✕

Fees No universal currency ▾

Available Date

Available Date Period

Begin Date/Time:

End Date/Time:

Ordering Instructions

Data can be downloaded in multiple formats ([FileGDB](#), [Shapefile](#), [CSV](#), [GeoJSON](#) and [JSON](#)) from the [SanGIS Data Warehouse](#) at <https://gis-sangis1.hub.arcgis.com/pages/download-data>

Refer to [SanGIS](#) website (www.sangis.org) to obtain further information on mapping and data extraction services available from [SanGIS](#).

Fields

Field Details

Under Field Details, Definition and Definition Source must be completed for every attribute (field). For system generated fields this should already be autocompleted. Label, Alias, Type and other field values should be auto populated by ArcGIS.

Note: Field/attribute details are one of the most important metadata elements in a dataset.

▼ Details: ABC_Licenses ✕

Label

▶ Entity Type

▶ Attribute: OBJECTID ✕

▶ Attribute: SHAPE ✕

▶ Attribute: Lic_Type ✕

▼ Attribute: Lic_No ✕

Label

Alias

Definition

Definition Source

Type

Width

Precision

Scale

Indexed

Value Explanation

Value Accuracy

Value Measurement Frequency

Beginning Date of Values

Ending Date of Values

Overview Description

Both Summary and Citation must be completed. If you don't have a citation it is okay to populate with "None".

Overview Description

Summary

This dataset contains Alcoholic Beverage Control licenses for San Diego County. This dataset is under constant revision. The data provided by ABC does not include a unique key ID field. Duplicates may exist. This metadata is derived from information provided on the ABC website.

Citation

California Department of Alcoholic Beverage Control (<https://www.abc.ca.gov>)
Go to <https://www.abc.ca.gov/datport/DataExport.html> for data downloads

Appendix: Reference Information

1. What is Metadata?

Metadata is “data about data”. It is information in addition to the spatial and tabular data that is required to make the data useful. Metadata is information you need to know in order to correctly use the data (www.gis.com). Metadata may describe the content of an item, the item’s datum, or a list of descriptions for codes used in the data. “Metadata (sometimes written ‘meta data’) is used to facilitate the understanding, use and management of data” (<http://en.wikipedia.org/wiki/Metadata>). At a minimum, the metadata should include the source and projection of the data, the definitions of every attribute and any disclaimers for the data.

2. SanGIS Metadata Requirements

All data submitted to SanGIS must contain the minimum metadata elements described below. SanGIS requires not only that these elements be completed but that they contain substantive, quality information.

The required SanGIS metadata fields are summarized below. This summary is organized by metadata group, section, and item (aka element) as seen when using the ESRI Metadata Stylesheet “ISO 19139 Metadata Implementation Specification” while editing metadata using ESRI’s ArcCatalog software. Only the metadata elements required by SanGIS are covered here. All metadata items not required by SanGIS are optional. Users are encouraged to use all metadata elements needed to fully describe the data set whether that metadata element is required by SanGIS or not.

A detailed step by step guide is provided starting in Section 3 below.

2.1 Overview

It is important to adequately complete the Item Description fields in the Overview Group as these elements are published to ArcGIS Online and other output products. The Item Description elements provide the basic information for all users to understand what the data covers, how it should be used, and what limitations apply.

Item Description

- Title – Feature Class or Layer name (auto-completed by ArcGIS)
- Tags –These are keywords not linked to a thesaurus used by search engines to locate relevant data
- Summary (Purpose) – The purpose of the dataset, not to be confused with description. The Summary may be a short version of the Description but should indicate, in a brief sentence or two, what the data set is and what its intended purpose (use) is.
- Description (Abstract) – This should be detailed enough to allow the user to understand the content and nature of the dataset. The Description is frequently an expanded explanation of the Summary (Purpose) and will include more detail about how the data is expected to be used, created, etc.

- Credits – A recognition of those who created or contributed to the dataset
- Use Limitation – Key limitations to the use of the dataset. What the data should not be used for, cautions on the use of the data, legal limitations, etc. Note: Use limitation is the same as General Constraints included under Resource > Constraints > General Constraints. When you complete either one, the other is automatically updated. An example is: *Data is generalized and created for use in regional projects. Please refer to SanGIS data end user use agreement and disclaimer which is available on the SanGIS website (www.sangis.org).*
- Bounding Box – This is automatically populated by ArcGIS but can be edited if desired

Topics & Keywords

- Topic Categories (check boxes) – Check all that apply to this dataset
- Theme Keywords – Searchable keywords that describe what the data covers
- Place Keywords – Searchable keywords that describe the area covered by the data

Citation

- Title – Feature Class or Layer name (auto-completed by ArcGIS)
- Published Date – This is the date when the dataset is published or otherwise made available for release from source or owner such as SANDAG, City, or County. This is not the date that SanGIS publishes datasets to the Regional Data Warehouse. It is the date the data owner made it available for use to others.

2.2 Metadata

In the Metadata Group only the Date Stamp, under the Details section, is required by SanGIS. However, users are encouraged to add as much information as they have under the Contacts, Maintenance, and Constraints sections.

Details

- Date Stamp – Automatically populated by ArcGIS but can be manually edited if desired.

2.3 Resource

The minimum required elements for SanGIS in this Resource Group are described below. Users are encouraged to add metadata to all sections in this group if needed to accurately describe the dataset.

Details

- Status – State of completeness of dataset, select from drop-down list. Completed, Historical Archive, Obsolete, On Going, Planned, Required, Under Development.
- Spatial Representation Type – Auto-completed by ArcGIS but can be manually edited if desired.

Extents

- Description – Extents relate to the time period of the data itself. That is, what is the time period covered by the data. Describes the spatial or temporal extent of the resource, e.g. San Diego County for spatial extent. A description of the temporal extent

is the basis on which the time period of content information is determined. That is, the date at which the data is considered updated, i.e. Ground condition or Publication Date

- Temporal Period Extent (insert dates) – This equates to the ‘Date of the Data’ or time at which the data is accurate on the ground.

Points of Contact

SanGIS requires a contact here with the role of Point of Contact. The following details must be included

- Contact Name
- Organization
- Position, Role
- Email, Address Type
- Address, City, State, Postal Code, Country
- Phone Number

Maintenance

- Update Frequency – The expected frequency of update of data. Is associated with the ‘Next Update Date’. Select from drop down code list as follows: Continual, Daily, Weekly, Fortnightly, Monthly, Quarterly, Biannually, Annually, As Needed, Irregular, Not Planned, Unknown.

Constraints

- General Constraints – Restrictions and legal prerequisites to use of dataset. This is replicated from Overview > Use Limitation

Spatial Reference

This is autocompleted by ArcGIS

Distribution

Distributor:

Contact – A contact with the role of ‘Distributor’, this may replicate the Point of Contact.

New Ordering Instructions – Complete ordering instructions and available date period if appropriate This describes instructions, terms, and services provided by the distributor. It is recommended to include text here for public metadata pointing to SanGIS website services, e.g. *Data can be downloaded in multiple formats (FileGDB, Shapefile, CSV, GeoJSON and JSON) from the SanGIS Data Warehouse at <https://gis-sangis1.hub.arcgis.com/pages/download-data>*

Refer to SanGIS website (www.sangis.org) to obtain further information on mapping and data extraction services available from SanGIS.

Digital Transfer Options:

Select New Online Resource and complete the Description field with where data is available, e.g., SanGIS Downloadable Data

Fields

Attribute Details:

The following fields are *mostly* autocompleted by ArcGIS. The Definition should be manually edited to comprehensively explain the attributes in this field.

- Label – Dataset Name Autocompleted by ArcGIS
- **Definition – It is essential to complete this field with details about the attribute. Any codeset domain values and descriptions should be included here.**
- **Definition Source – The authority that provided the description of the field's data**
- Type – Autocompleted by ArcGIS
- Width – Autocompleted by ArcGIS
- Precision – Autocompleted by ArcGIS
- Scale – Autocompleted by ArcGIS
- Indexed – Autocompleted by ArcGIS

Overview:

Summary

A detailed summary of the information provided by the resource's data. This should summarize the key fields in the dataset but should not include domain values. These should instead be detailed within the specific attribute fields (see below), e.g. This dataset shows the vegetation communities throughout San Diego County. The Legend field provides a description of the terrestrial vegetation communities in San Diego County. The field HOLLAND95 provides the Code representing Terrestrial Vegetation Communities in San Diego County. Other important fields include Historical (vegetation type pre-disturbance) – see individual attributes for domain values.

Citation

This references a document that provides a complete description of the features, fields, and values that are provided by the resource if available. If none, say "None". E.g. Classification based on Sproul, F., et al., 2011. Vegetation Manual for Western San Diego County.