
RGDW METADATA USER MANUAL FOR ARCGIS PRO

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Contents

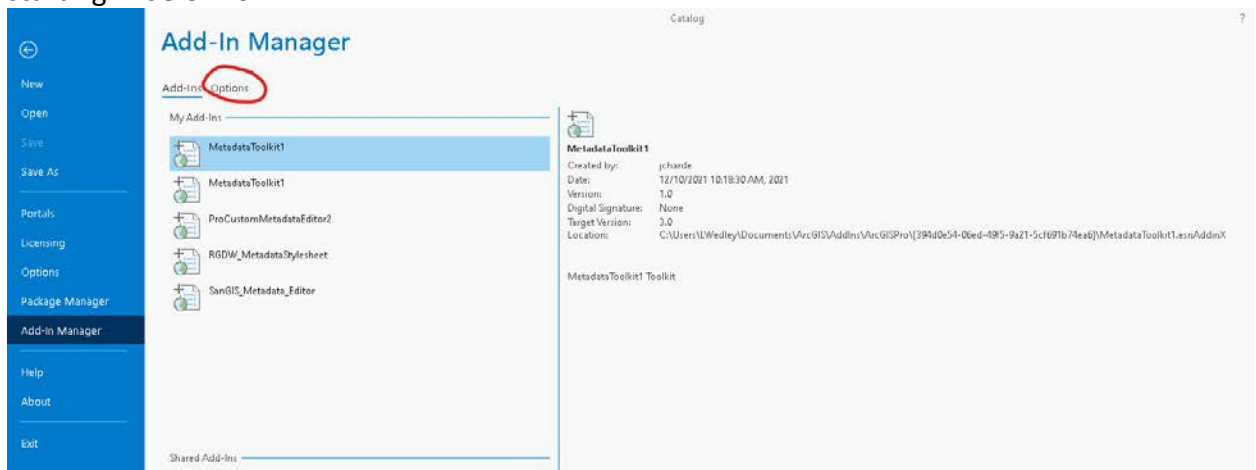
Section 1: Installation of RGDW Stylesheet Add-In	2
Metadata Transfer from ArcGIS Catalog to ArcGIS Pro	2
Section 2: RGDW Metadata in Pro.....	4
1. Getting Started	4
2. Importing Metadata.....	6
3. Create Thumbnail	6
4. View Metadata	7
Section 2: Editing Metadata to Conform with SanGIS Metadata Standard (RGDW).....	9
1. Editing	9
2. Overview.....	10
Item Description	10
3. Metadata	10
4. Resource	11
Extents	11
Point of Contact.....	11
Maintenance.....	11
Spatial Reference.....	11
Distribution.....	11
Fields	12
APPENDIX 1: SanGIS Metadata Requirements/ Cheat sheet	14
APPENDIX 2: Notes on Metadata in ArcGIS Enterprise GIS Portal	15

Section 1: Installation of RGDW Stylesheet Add-In

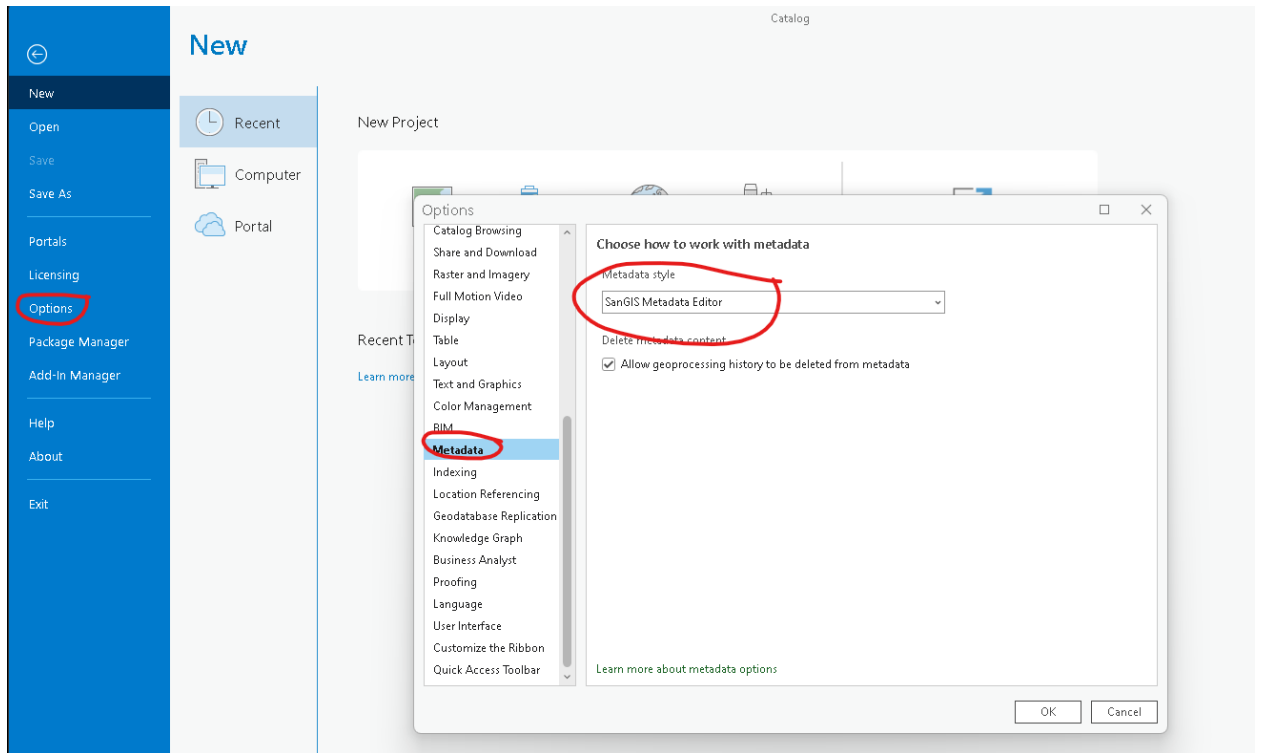
Metadata Transfer from ArcGIS Catalog to ArcGIS Pro

1. To begin our installation of the Metadata add-in, we first need to add files:
 - a. Locate the stylesheets folder for your local ArcGIS Pro install, this location may vary, but by default it is located at: C:\Program Files\ArcGIS\Pro\Resources\Metadata\Stylesheets
 - b. Copy the **RGDW_Publication_1.4.xsl** file into the Stylesheets folder (you may need to copy this from your desktop).
 - c. Copy all the files from the **ArcGIS_Imports folder** in the zip file to the ArcGIS_Imports folder in Stylesheets. Many will be duplicates in which case pick the newer ones (you may need to copy these from your desktop).
 - d. Run the MetadataToolkit1.esriAddinX by double clicking it and following the instructions on screen until it is installed (you may need to run it from your Desktop).
 - e. Once that is installed, verify in your ArcGIS Add-in manager that it is installed by clicking the Project tab -> Add-in Manager tab.

If it does not appear, you can click the options tab under right next to Add-ins and manually add the folder in which the Add-in is located. If it still does not appear, try re-starting ArcGIS Pro.



2. To select the new Metadata stylesheet, simply click the options tab on the left and scroll down on the menu until you see Metadata, then select the stylesheet that you would like to use.

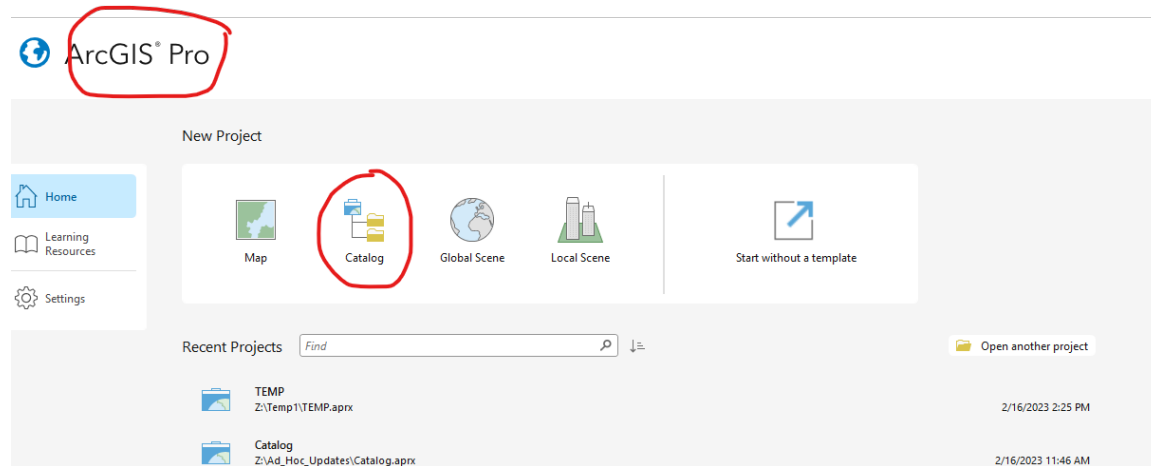


3. You can now use the RGDW Publication 1.4 Stylesheet in ArcGIS Pro (SanGIS Metadata Editor).

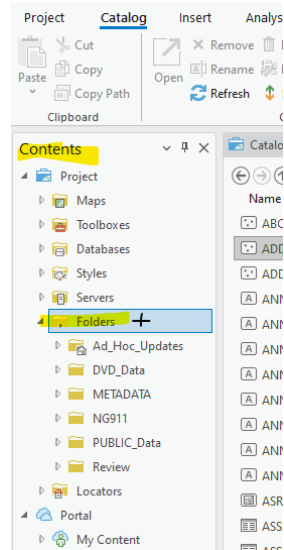
Section 2: RGDW Metadata in Pro

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).

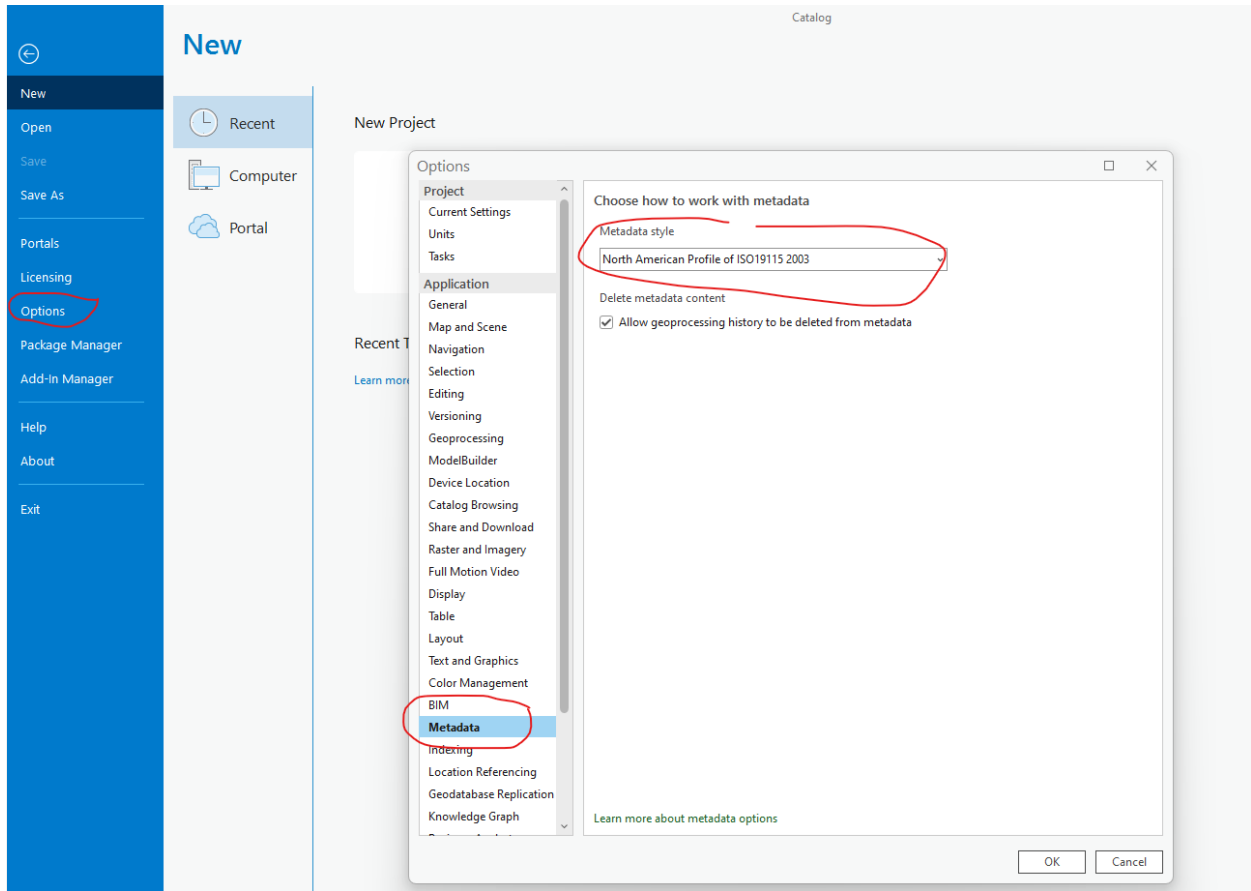


It is recommended to add Folder connection(s) (on the Contents Pane) to the folders where your data resides.

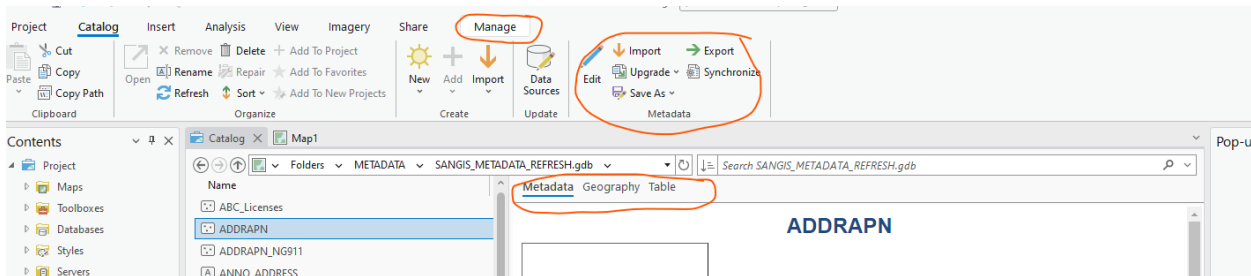


You can configure the Metadata style by going to Project > Options > Metadata. Make sure it is not set to Item Description as it is too limited. If you do not have the SanGIS Metadata Editor

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

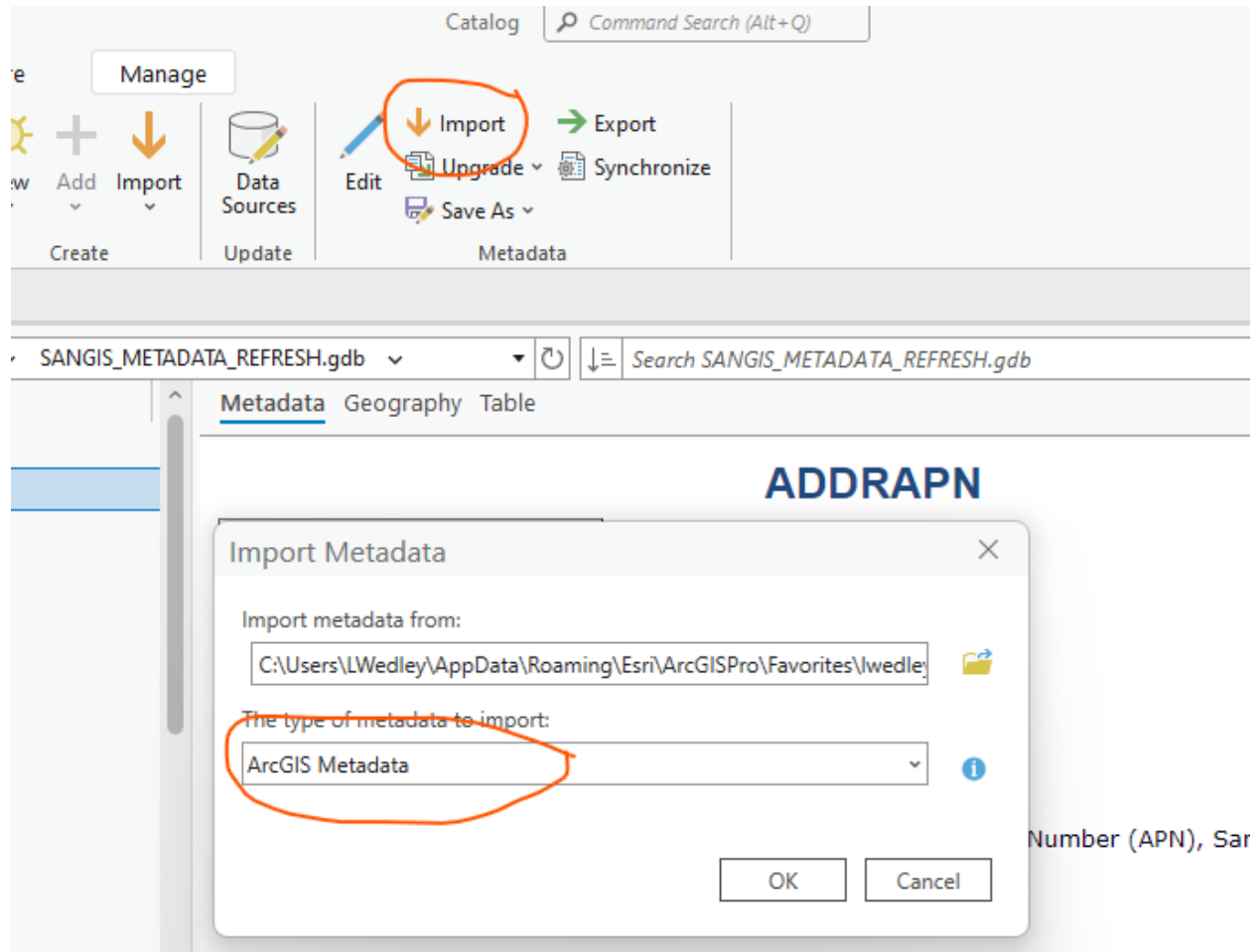


Browse to your folder or FGDB on the Contents Pane, select the layer you want to edit the metadata for on the Catalog pane, go to the Catalog Pane, Metadata group to edit your metadata.



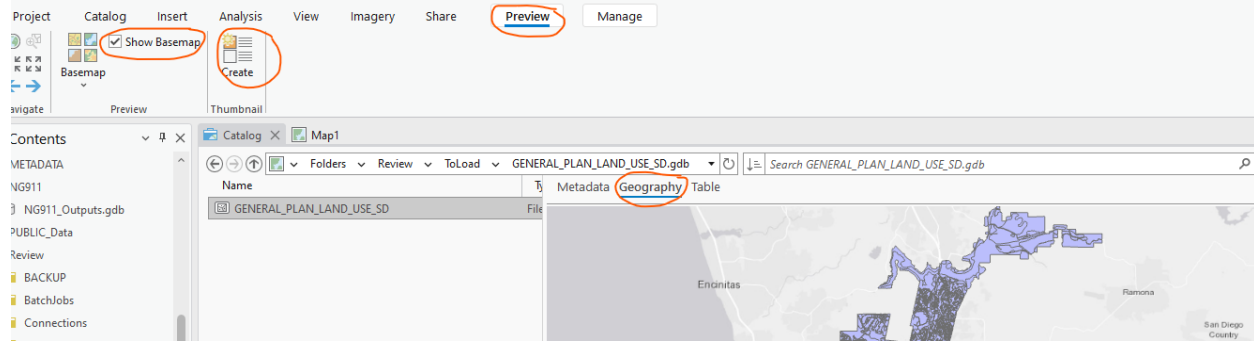
2. Importing Metadata

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.



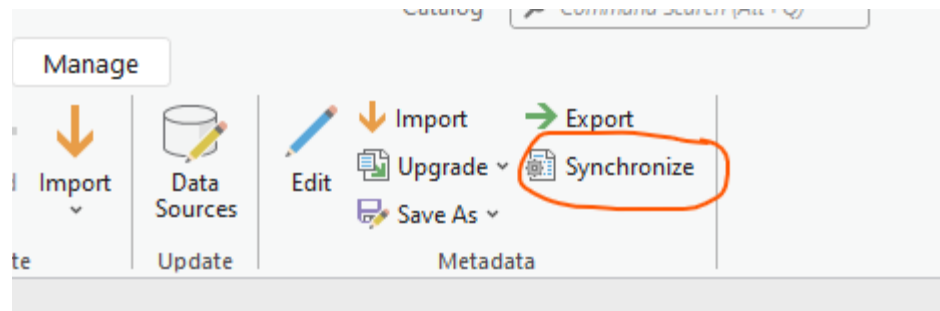
When you go back to the Metadata tab from Geography the new thumbnail should appear.

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)
- Date of Data (Temporal Period Extent) – add text to explain date
- Resource Details (Update Frequency)
- Spatial Reference System (this should be auto populated by ArcGIS)
- Contacts: Point of Contact AND Distributor (both must contain at least 2 entries for contact information from email, address and phone). 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: Definition and Definition Source must be completed for all fields or if too many fields include a source for field descriptions in field overview. 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).



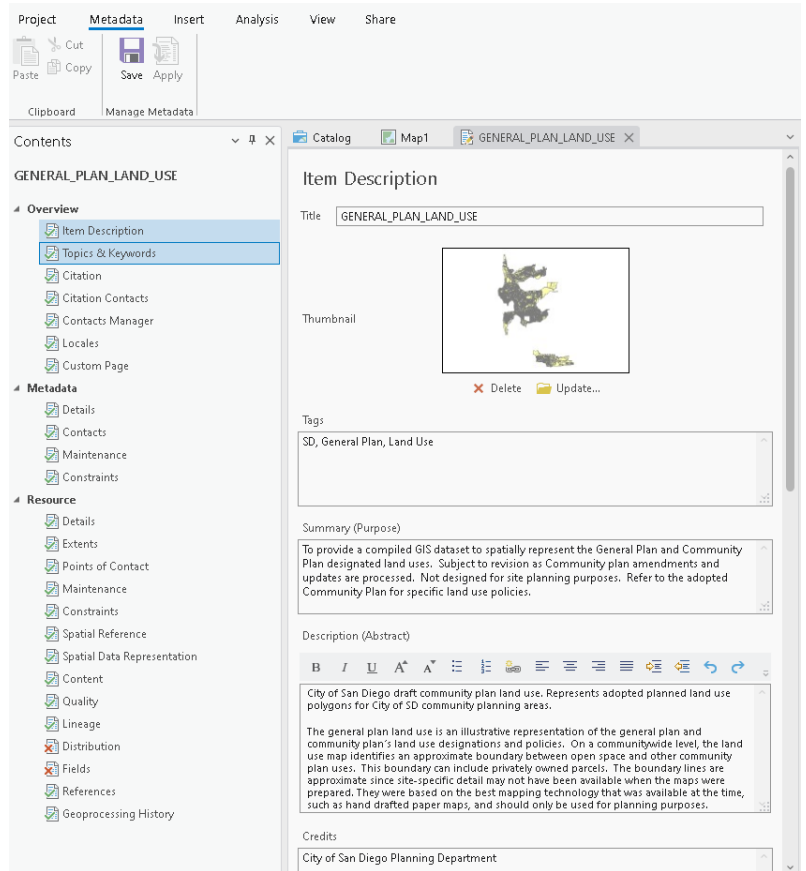
Key Tip: Sometimes changes such as Thumbnail, Number of Records and Extent don't update immediately. Using the synchronize button or should fix this.

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

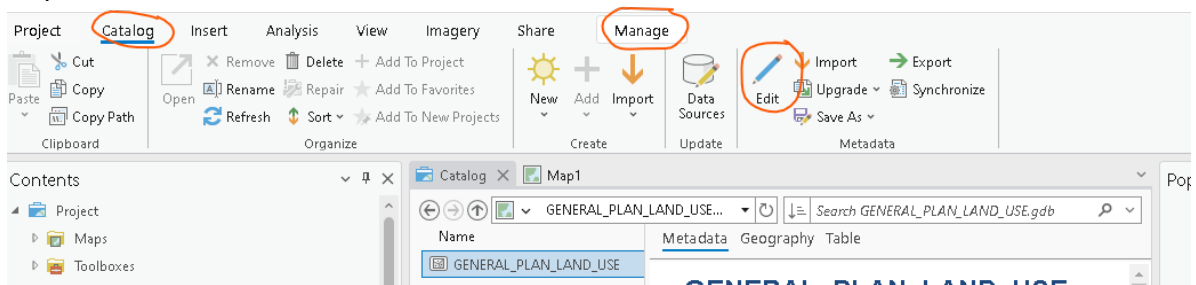
1. Editing

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.

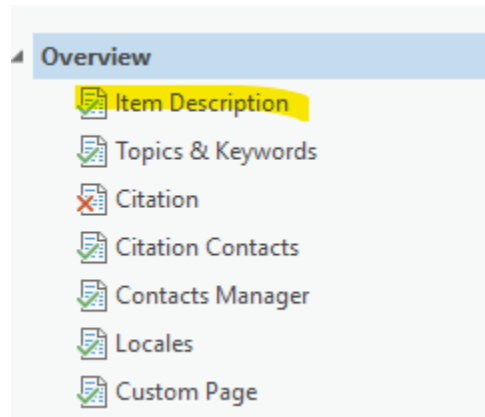


Metadata is managed through 3 larger sections: Overview, Metadata and Resource. The required elements within each of these sections is detailed below.



2. Overview

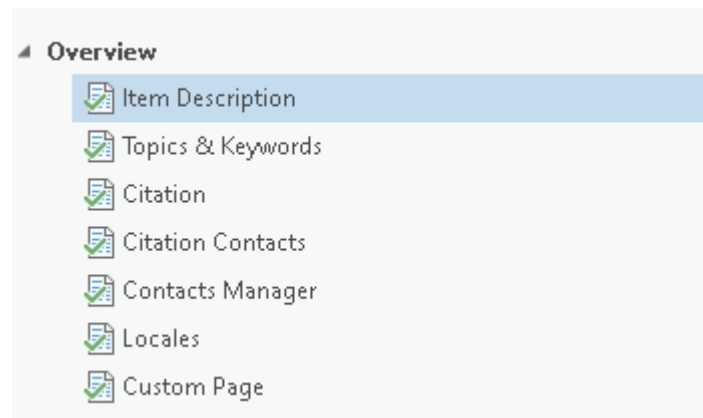
Required elements are located under Item Description, Topics & Keywords and Citation only. Other tabs can be ignored (Citation Contacts, Contacts Manager, Locales, Custom Page).



Item Description

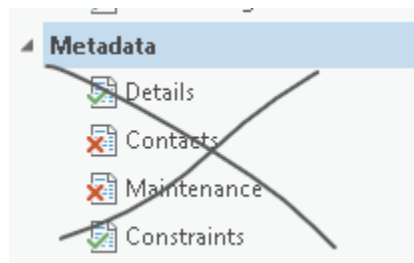
Item Description items should be completed as follows:

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



3. Metadata

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

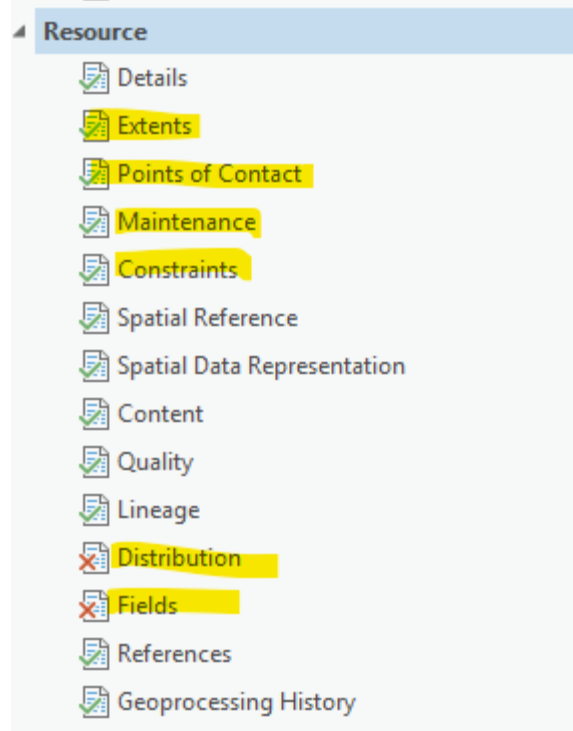


4. Resource

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

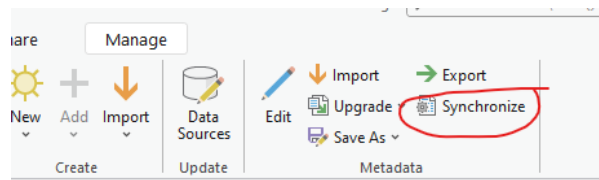
Other sub-sections can be ignored.



Extents

Description and Temporal Instant Extent must be completed. The Temporal Instant Extent is the date of the data or date that best represents the data. Please include in Description details of how the date is derived.

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



Point of Contact

At least two entries must be included for contact information (email, phone, address). The Name can be a role name. Position can be a Department or Division.

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. At least two entries must be included for contact information (email, phone, address).

The Name can be a role name. Position can be a department or Division. See recommended details for SanGIS as Distributor below.

- Ordering Process > Ordering Instructions. Recommendation on what to include below if Distributor is 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 auto completed. 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.

If there are too many fields to complete metadata for, then an information source must be provided where fields are described. This can be included in the Overview Description.

The screenshot shows the metadata editor for a dataset named 'ABC_Licenses'. The 'Attribute: Lic_No' section is expanded, revealing the following fields and values:

Label	Lic_No
Alias	Lic_No
Definition	License Number - The number assigned to a specific ABC license
Definition Source	https://www.abc.ca.gov/dataport/LQS_glossary.html
Type	Double
Width	8
Precision	0
Scale	0
Indexed	
Value Explanation	
Value Accuracy	
Value Measurement Frequency	Empty
Beginning Date of Values	15
Ending Date of Values	15

Overview Description

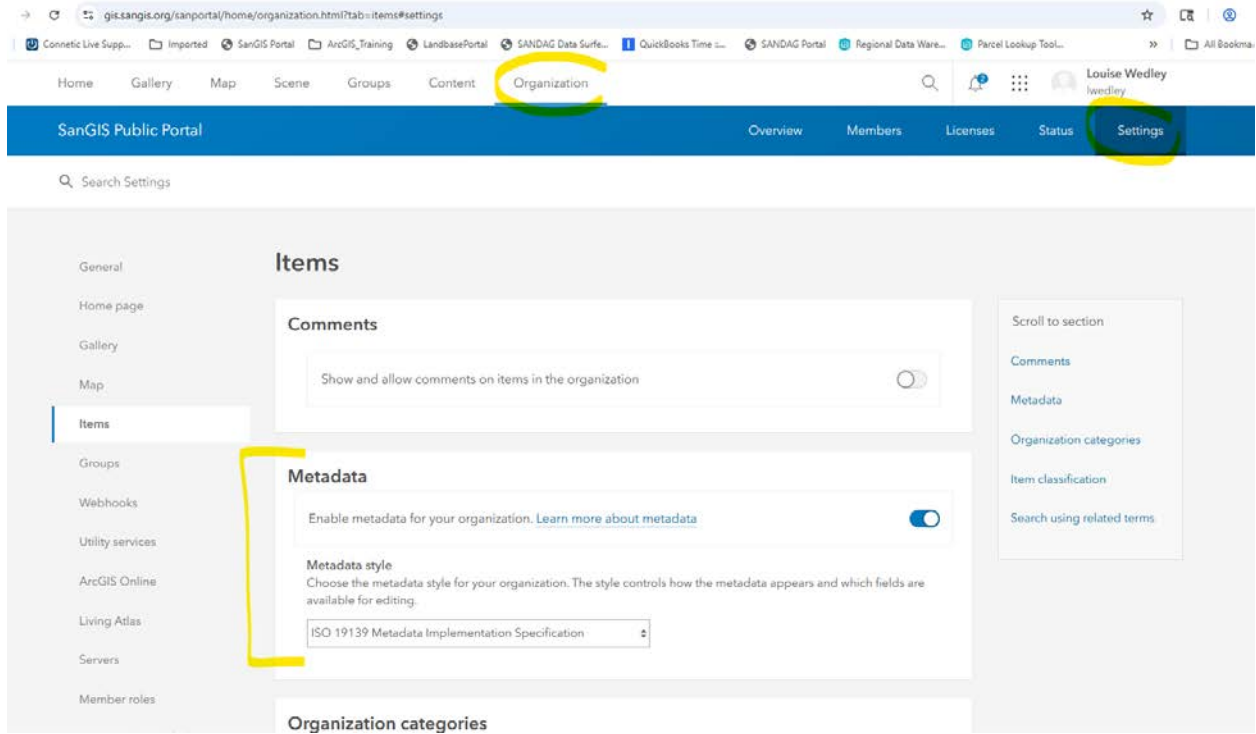
If there are too many fields to complete metadata for, then an information source must be provided where fields are described in the summary. This could point to a url or document.

APPENDIX 1: SanGIS Metadata Requirements/ Cheat sheet

Group	Section	Sub-Section	Item	Path	Description
Overview					
		Item Description	Title		Automatically completed by ArcGIS
			Tags	Overview > Item Description > Tags	Keywords used by search engines to locate relevant data
			Summary (Purpose)	Overview > Summary	A short version of the Description indicating, briefly, what the data set is and what its intended purpose (use) is.
			Description (Abstract)	Overview > Description	Frequently an expanded explanation of the Summary (Purpose) but includes more detail about how the data is expected to be used, created, etc. Include important dates for data based on policy, etc here.
			Credits	Overview > Credits	A recognition of those who created or contributed to the dataset
			Use Limitation	Overview > Use Limitation	Limitations to the use of the dataset, cautions, legal limitations, etc.
			Bounding Box		Automatically completed by ArcGIS
		Citation	Title		Automatically completed by ArcGIS
Resource					
		Extents	Description	Resource > Extents > Extent > Description	Best description of date used and what it represents, e.g. date downloaded, date features last edited, date last published etc
			Temporal Period Extent	Resource > Extents > Extent > Temporal Instant Extent > Instant Date Or >Begin Date AND >End Date	'Date of the Data' or time at which the data is accurate on the ground. Can use range of dates or single date. Use Description as well where possible
		Points of Contact			Note: Must include at least 2 entries for contact information (from email, address, phone)
			Contact Name	Resource > Points of Contact > Contact > Name	This can be a contact name or roll for metadata queries on dataset
			Organization	Resource > Points of Contact > Contacts > Organization	Name of agency, company, division, department, etc.
			Position	Resource > Points of Contact > Contacts > Position	Contact title or position in the organization
			Role	Resource > Points of Contact > Contacts > Role > Point of Contact	Role or Division of this contact in the metadata preparation and publication
			Email	Resource > Points of Contact > Contacts > Contact Information > Email	Email address of contact for queries on dataset
			Address	Resource > Points of Contact > Contacts > Contact Information > Address	Street address including suite or unit number
			City	Resource > Points of Contact > Contacts > Contact Information > City	Post office name, community, or city
			State	Resource > Points of Contact > Contacts > Contact Information > State	State or province
			Postal Code	Resource > Points of Contact > Contacts > Contact Information > Postal Code	Zip code, Zip +4 code, or postal code
			Country	Resource > Points of Contact > Contacts > Contact Information > Country > United States	County
			Phone Number	Resource > Points of Contact > Contacts > Contact Information > Phone	Phone number for contact or organization
		Maintenance	Update Frequency	Resource > Maintenance > Update Frequency	Expected frequency of update of data
		Constraints	General Constraints	Resource > Constraints > General Constraints	Restrictions and legal prerequisites to use of dataset. This is replicated from Overview > Use Limitation
		Spatial Reference	Reference Systems		Automatically completed by ArcGIS
		Distribution			
		<i>Distributor</i>	Contact	Distributor > New Ordering Process > Distributor	A contact with the role of 'Distributor', this may replicate the Point of Contact but should be SanGIS if layer is published to Regional Data Warehouse
			Ordering Instructions	Distributor > New Ordering Process > Ordering Instructions	Complete ordering instructions and available date period
		Fields			
		<i>Details</i>	Label		Automatically completed by ArcGIS
			Definition	Resource > Fields > Details > Attribute [Fieldname] > Definition	Details about the attribute. Any codeset domain values and descriptions are included here
			Definition Source	Resource > Fields > Details > Attribute [Fieldname] > Definition Source	The authority that provided the description of the field's data
			Type		Automatically completed by ArcGIS
			Width		Automatically completed by ArcGIS
			Precision		Automatically completed by ArcGIS
			Scale		Automatically completed by ArcGIS
			Indexed		Automatically completed by ArcGIS
		<i>Overview Description</i>	Summary	Resource > Fields > Overview Description > Summary	Use this if there are too many fields to provide metadata for. This can point to a url or document where fields descriptions are available.

APPENDIX 2: Notes on Metadata in ArcGIS Enterprise GIS Portal

Organization > Settings > Enable Metadata for your organization and choose a metadata style

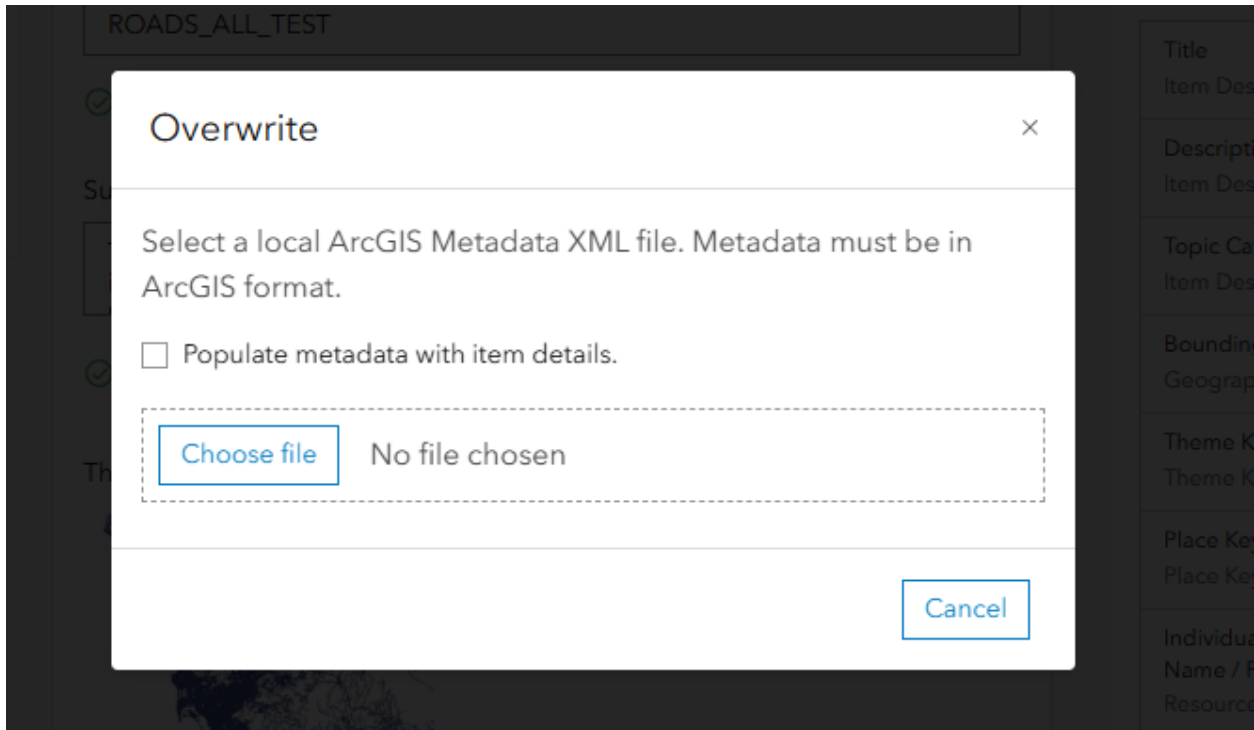


Select Metadata item for Feature Service you are editing to open the Metadata editor:

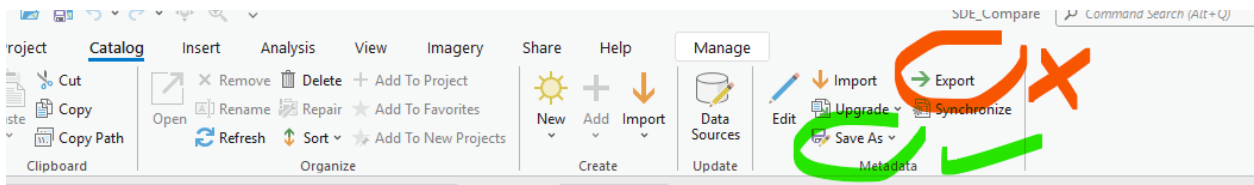
The screenshot shows the ArcGIS Pro interface with the 'ROADS_ALL_TEST' item selected. The top navigation bar includes 'Home', 'Gallery', 'Map', 'Scene', 'Groups', 'Content', and 'Organization'. The right-hand menu has tabs for 'Overview', 'Data', 'Visualization', and 'Settings'. The 'Metadata' button is highlighted with a yellow circle. The main content area displays a thumbnail of the road network, a description of the dataset, and a 'Share' button also circled in yellow. The 'Item Information' section shows a progress bar from 'Low' to 'High'.

You can import metadata from an xml file by choosing the overwrite option

The screenshot shows the 'Metadata Editor' window with the 'Essential metadata' tab selected. The 'Title' field contains 'ROADS_ALL_TEST'. The 'Summary (Purpose)' field contains a detailed description of the road dataset. The 'Save' button in the top right corner is circled in yellow, and its dropdown menu is open, showing the 'Overwrite' option also circled in yellow. Other options in the menu include 'View XML', 'View HTML', 'Download', and 'Reset'.



Important Note on exporting metadata to xml format from ArcGIS Pro. Use the Save as option to export your metadata to xml. If you use the Export option, this will not create a valid xml for use in ArcGIS Portal.



Note, imported metadata will be overwritten when a feature service is overwritten.