EPA Metadata Editor v5.0

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Welcome

- Introducing the new metadata editor – EME 5.0!

- Purpose of the EME 5.0 is to make metadata editing easier and improve the quality of metadata records – as you create new metadata and edit old metadata use EME 5.0

  - No deadline for using the new tool

- Feedback welcome!

Introduction to EME 5.0

- EME 5.0 – What's new?

- Getting Started with EME 5.0

- Validation Tips

- ArcGIS Metadata, EDG & Data.gov

- EME 5.0 - Demo

- EME 5.0 - Important URLs

EME v5.0: What's new?

EME v5.0 New Features:

- It is integrated with Esri ArcGIS 10.4 and ArcCatalog metadata Editing Tools
- Fully implements the ISO metadata standard
- Metadata Field entries meet all Data.gov compliance requirements
- EPA specific dropdowns provided for many fields
- Mandatory fields highlighted
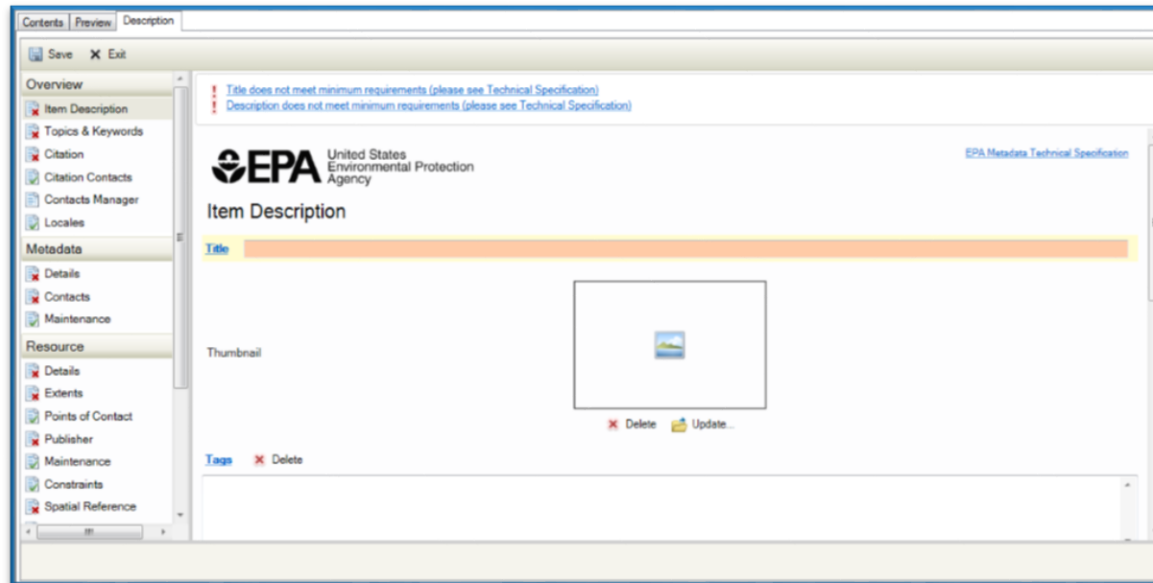
EME v5.0: What's New?

Benefits of using EME 5.0:

1. Integration of metadata with geospatial datasets
   - Bounding box coordinates
   - Spatial reference
   - Spatial data representation
   - Attributes
   - Geoprocessing history
2. Real-time validation
3. Consolidation of records (only one metadata record required for all distribution methods):
   - Web service
   - Data download
4. Best practices guidance included in tool

EME v5.0: Getting Started

Download EME 5.0:

1. Visit New EME Website!

2. Download Installation package

EME v5.0: Getting Started

Installing EME 5.0:

1. Uninstall old versions of EME 5.0

2. Run the installation file

3. It is not necessary to uninstall versions of EME prior to 5.0
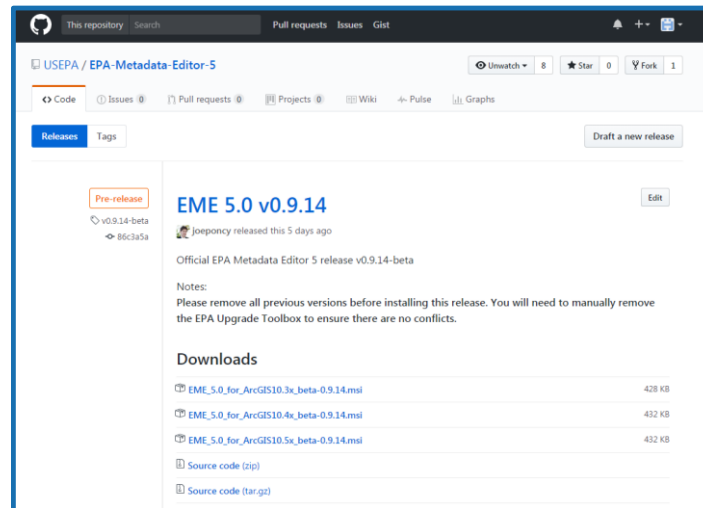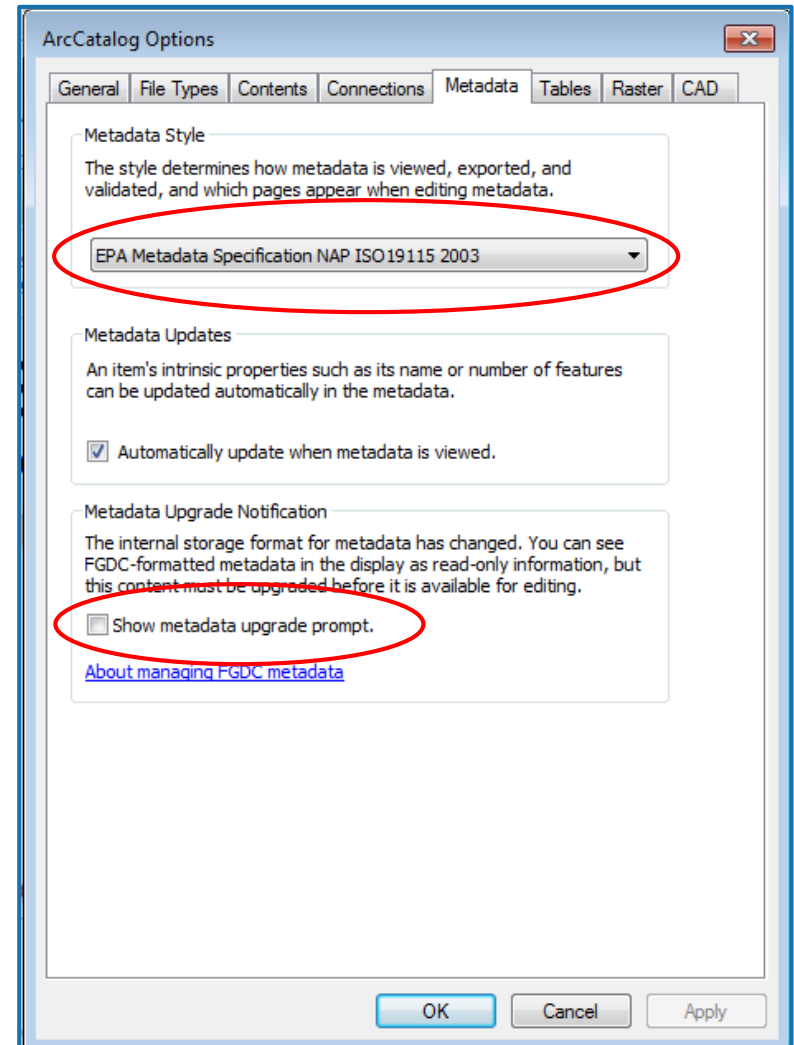

Note: You may receive a security notice when installing EME 5.0, this can be ignored. The install package was scanned and no risks were identified.

EPA

Enable New EME Tools:

1. Open ArcCatalog → Customize menu → ArcCatalog Options → Metadata

2. Select EPA Metadata Specification NAP ISO 19115 2003 as your Metadata Style

3. Uncheck box "Show metadata upgrade prompt"

ArcCatalog Options

General | File Types | Contents | Connections | Metadata | Tables | Raster | CAD

Metadata Style

The style determines how metadata is viewed, exported, and validated, and which pages appear when editing metadata.

EPA Metadata Specification NAP ISO19115 2003

Metadata Updates

An item's intrinsic properties such as its name or number of features can be updated automatically in the metadata.

☑ Automatically update when metadata is viewed.

Metadata Upgrade Notification

The internal storage format for metadata has changed. You can see FGDC-formatted metadata in the display as read-only information, but this content must be upgraded before it is available for editing.

☐ Show metadata upgrade prompt.

About managing FGDC metadata

OK | Cancel | Apply

EME v5.0: Getting Started

EPA Metadata Toolbox:

- Appears in "My Toolboxes" folder in the Catalog Tree

- Contains 5 Tools:
  - EPA Cleanup ArcGIS Record
  - EPA Upgrade FGDC to ArcGIS
  - Export ArcGIS Metadata to ISO
  - Merge a selected metadata record with a saved template
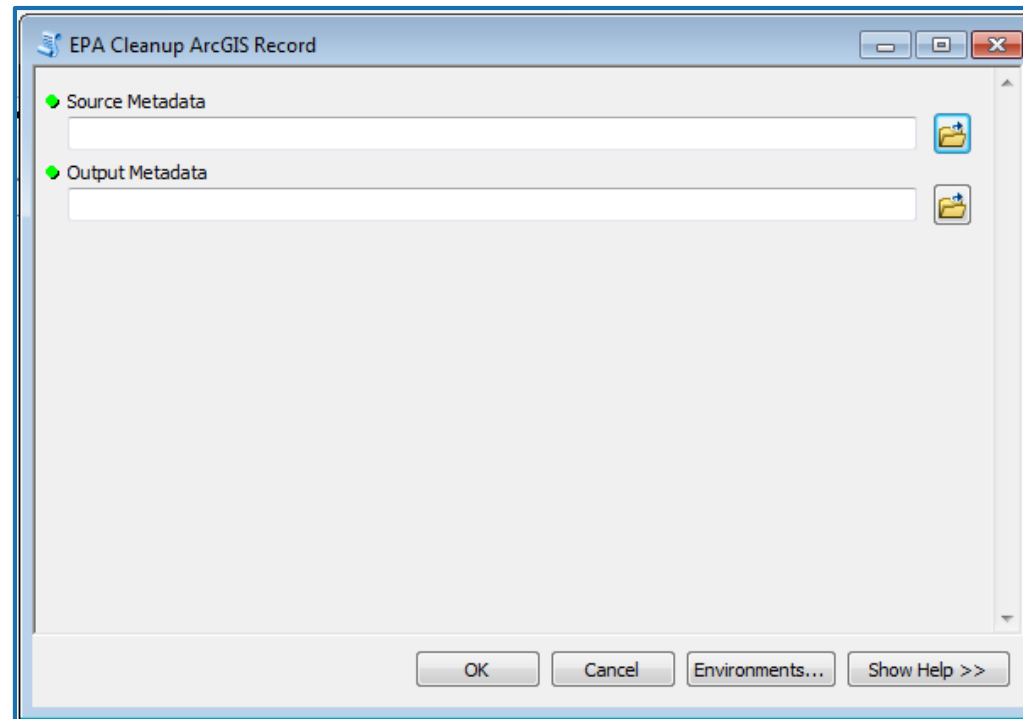 - Save record as metadata template
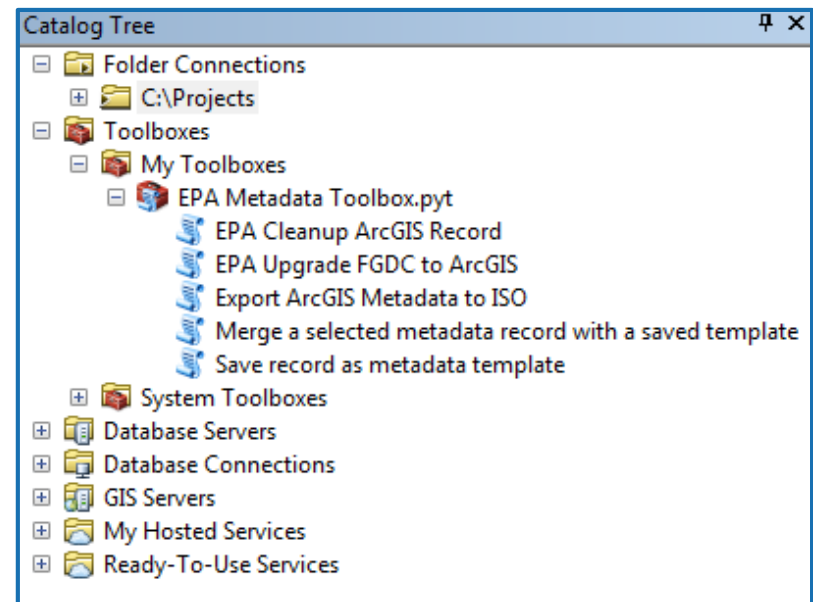
EPA Metadata Toolbox: *EPA Cleanup ArcGIS Record*

- For use when a metadata record has already been upgraded from FGDC CSDGM to ArcGIS format using the default Esri Upgrade Metadata tool.

EME v5.0: Getting Started

EPA Metadata Toolbox: *EPA Upgrade FGDC to ArcGIS*

- Used to upgrade all legacy FGDC CSDGM records to ArcGIS format.
- Aligns records with the EPA Metadata Technical Specification
- Ensures embedded UUIDs are recognized
- Removes legacy elements

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EME v5.0: Getting Started
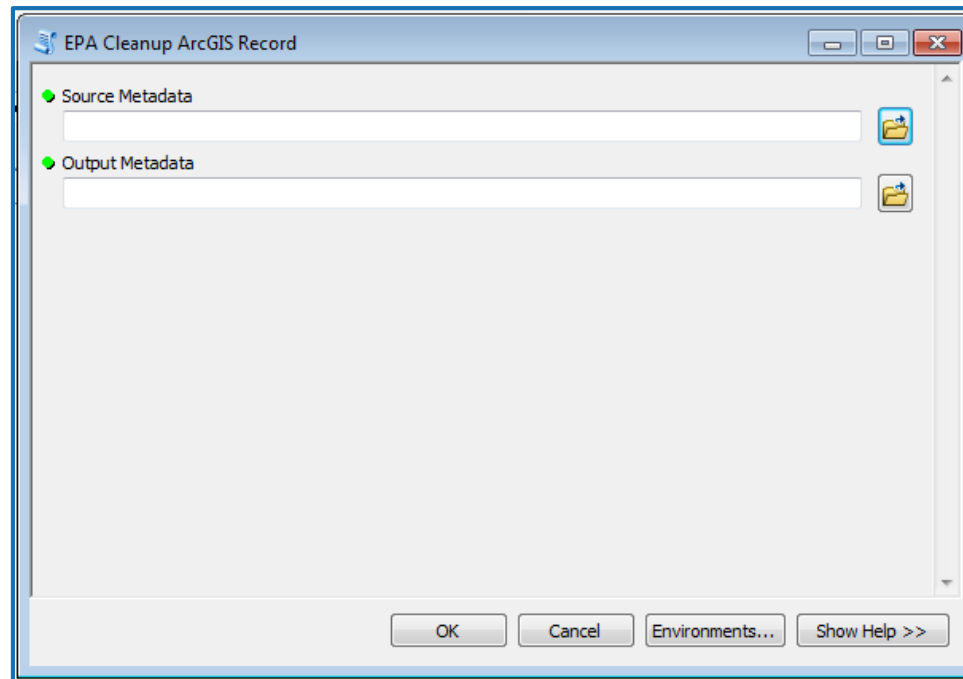
EPA Metadata Toolbox: *Export ArcGIS Metadata to ISO*

- Streamlines exporting ArcGIS metadata to compliant ISO 19115
- Equivalent to using the Export Metadata tool with ArcGIS2ISO19139 as the translator
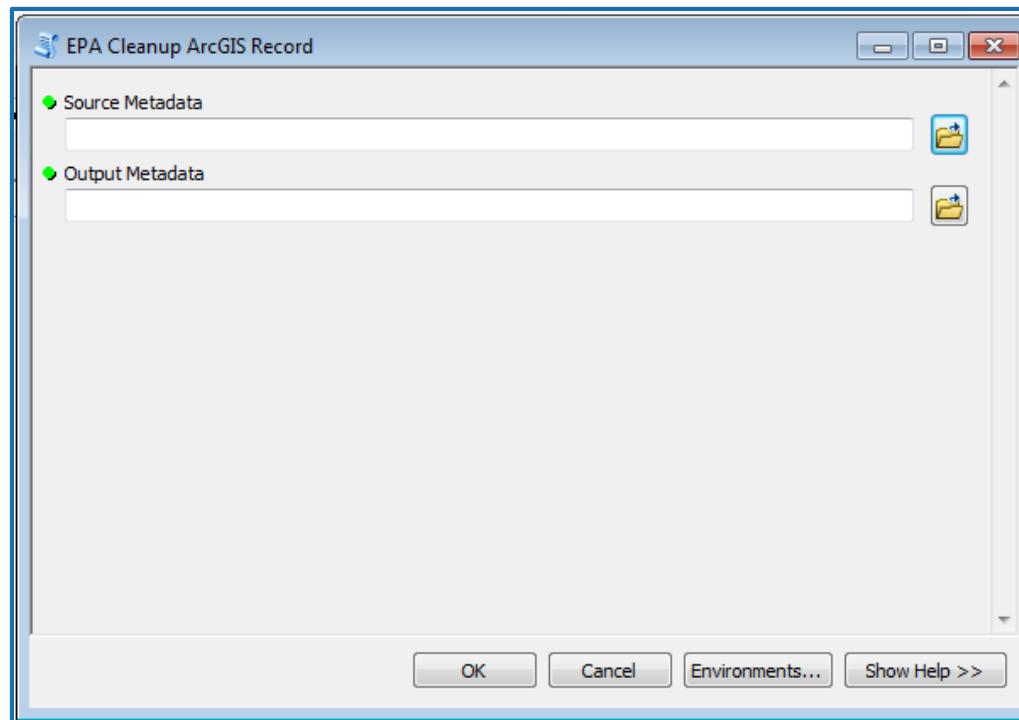
EPA Metadata Toolbox:
 *Merge a selected metadata record with a saved template*

- Merges a selected metadata record with elements from a saved template
- Elements from the template record will overwrite their equivalents in the selected record
- Replaces only those elements that are common across many records

Note: *caution is urged when using this tool*

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EME v5.0: Getting Started
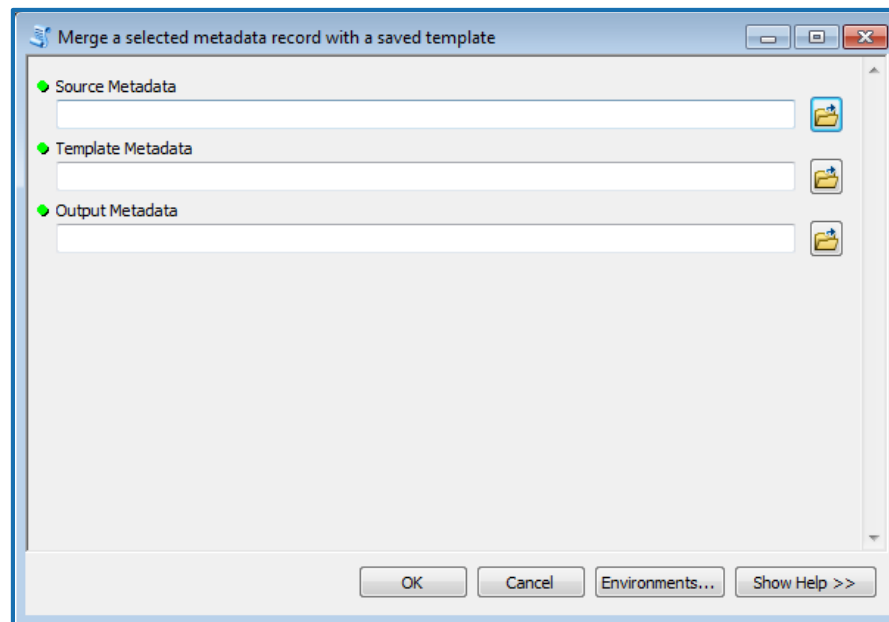
EPA Metadata Toolbox: *Save record as metadata template*

- Saves a metadata record as a reusable template
- Excludes elements that are unique in every record
    - Examples:
        - Title
        - Abstract
        - UUID
- Keeps common elements
    - Examples:
        - Metadata Contact
   - Publisher
        - Distribution Contact

EME v5.0: Getting Started
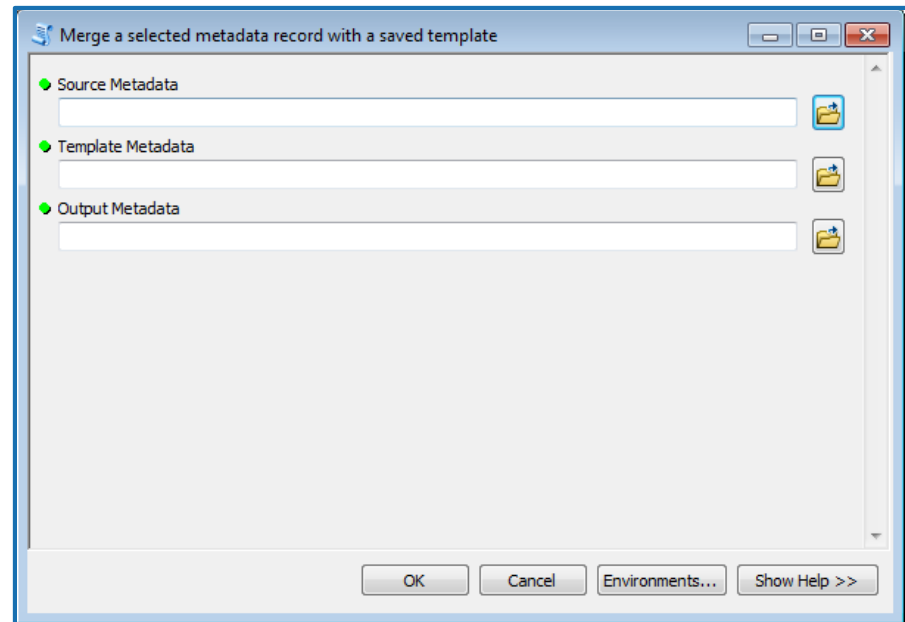
EME 5.0 Interface :

- To Edit Metadata using EME 5.0
  1. Navigate to an XML file or a GeoSpatial Dataset and click the ***Description Tab***
   - Allows viewing of metadata records in ArcGIS metadata format

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EME v5.0: Getting Started
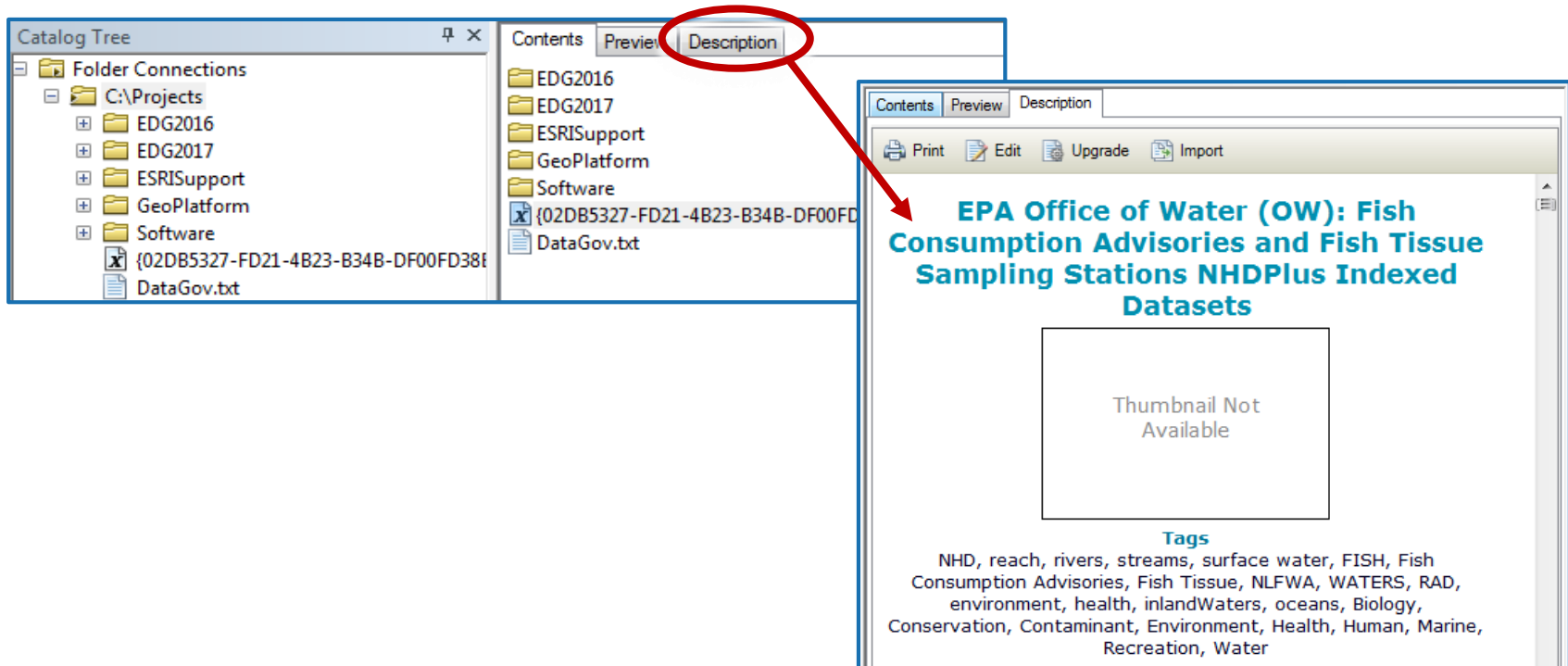
EME 5.0 Interface :

- To Edit Metadata using EME 5.0
  2. Click the *Edit* button
     - Opens EME 5.0

EME v5.0: Getting Started
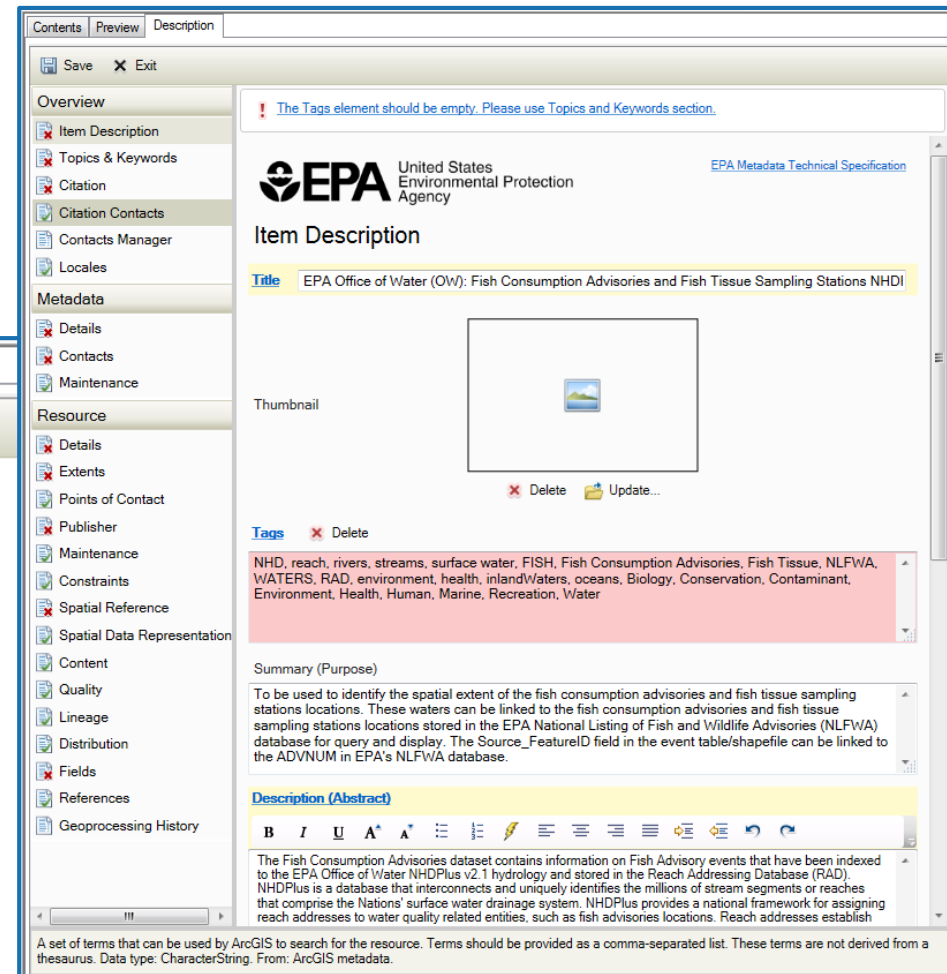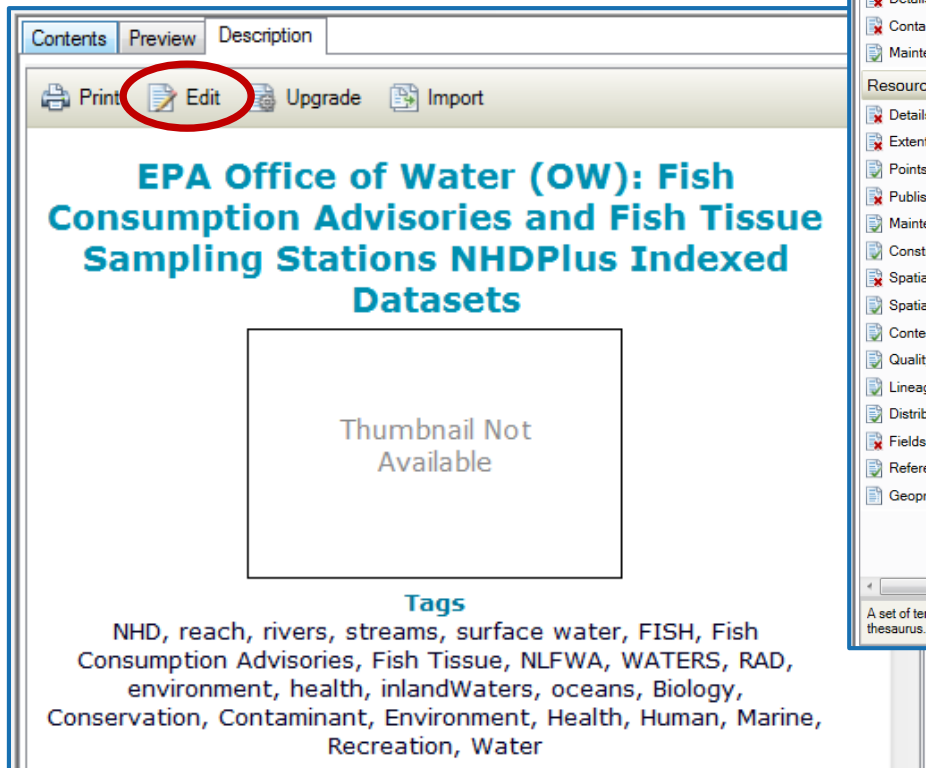
EME 5.0 Interface :

- Organized within ArcCatalog in a Table of Contents
- Clicking on a page in the table of contents displays a set of metadata fields in the *Editing pane*
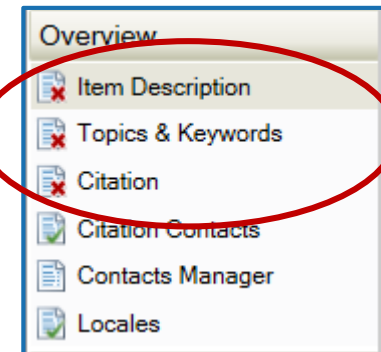
Table of Contents containing pages to be edited

Editing Pane

EME v5.0: Getting Started
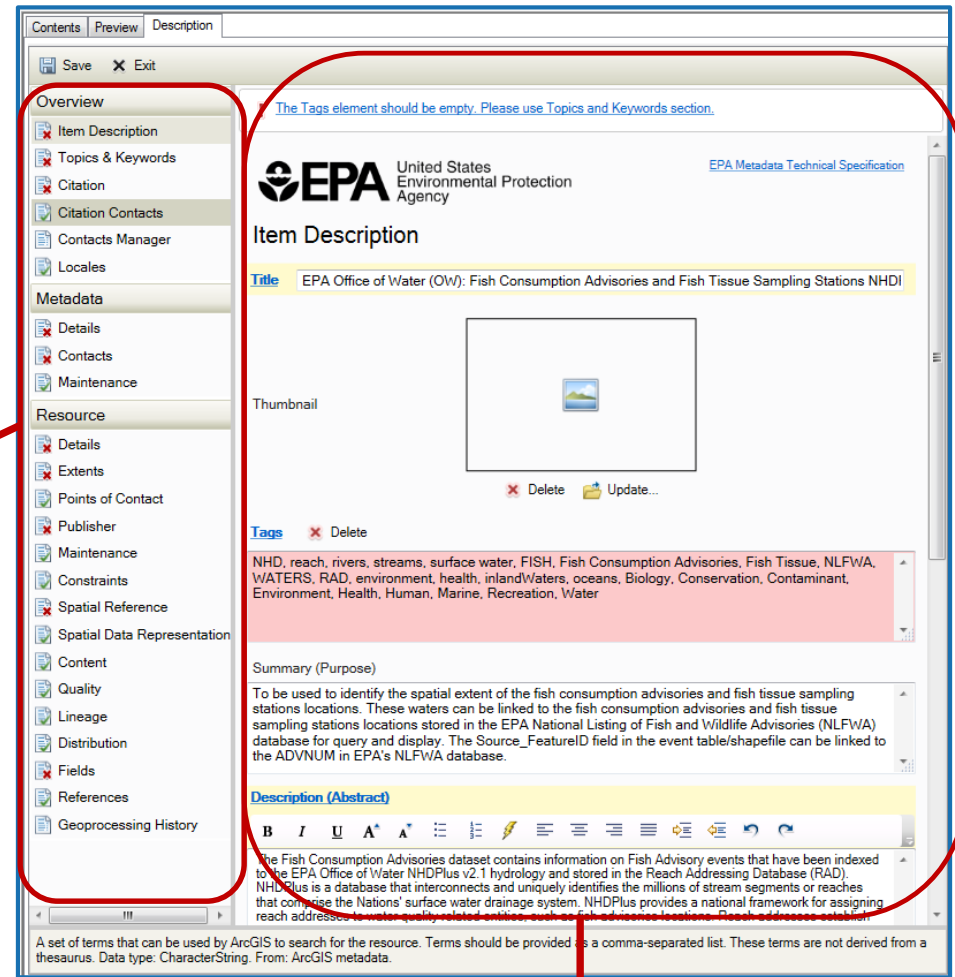
EME 5.0 Interface :

- Pages in the Table of Contents, symbolized with a Red X illustrate an error in the corresponding metadata fields
- Help text is found at the top of the *Editing pane* indicating the fields in the selected page that do not meet minimum metadata requirements

Overview
- Item Description
- Topics & Keywords
- Citation
- Citation Contacts
- Contacts Manager
- Locales

! The Tags element should be empty. Please use Topics and Keywords section.

United States Environmental Protection Agency

EPA Metadata Technical Specification

Item Description

Title | EPA Office of Water (OW): Fish Consumption Advisories and Fish Tissue Sampling Stations NHDI
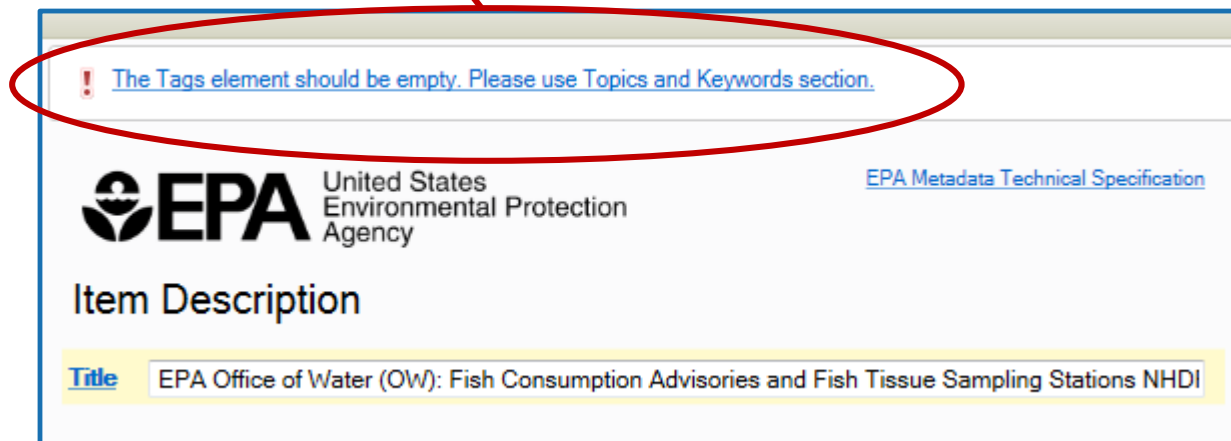
EME v5.0: Getting Started

EME 5.0 Interface :

- Errors may not be immediately visible and instead a section needs to be expanded to find the element error.

Dropdown arrow opens an expandable section

EME v5.0: Getting Started
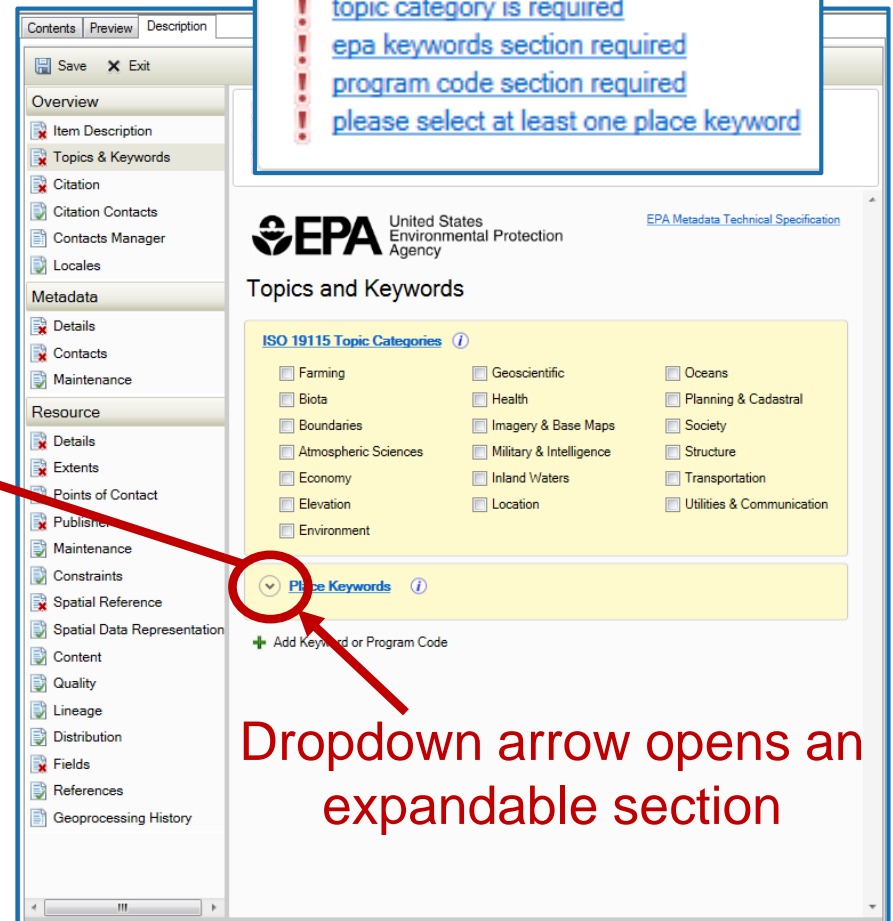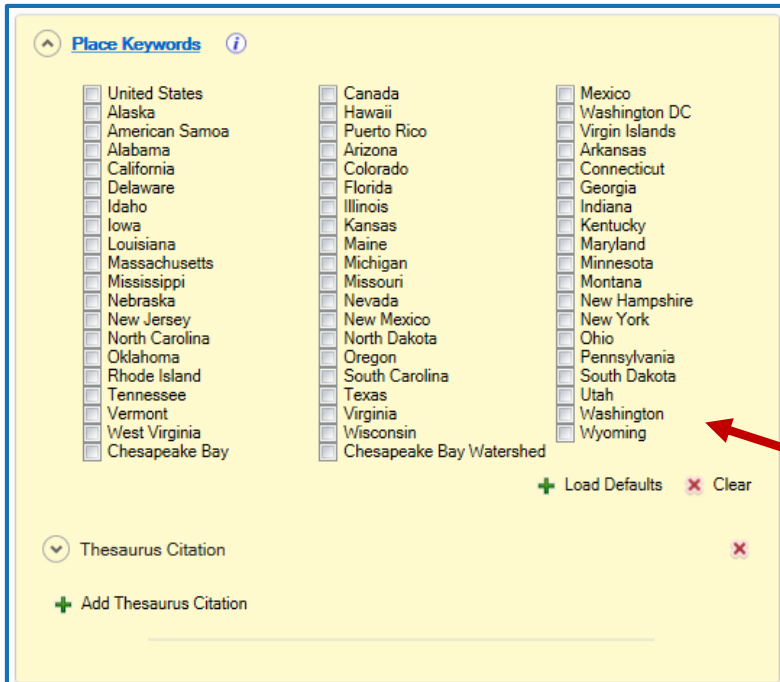
EME 5.0 Interface :

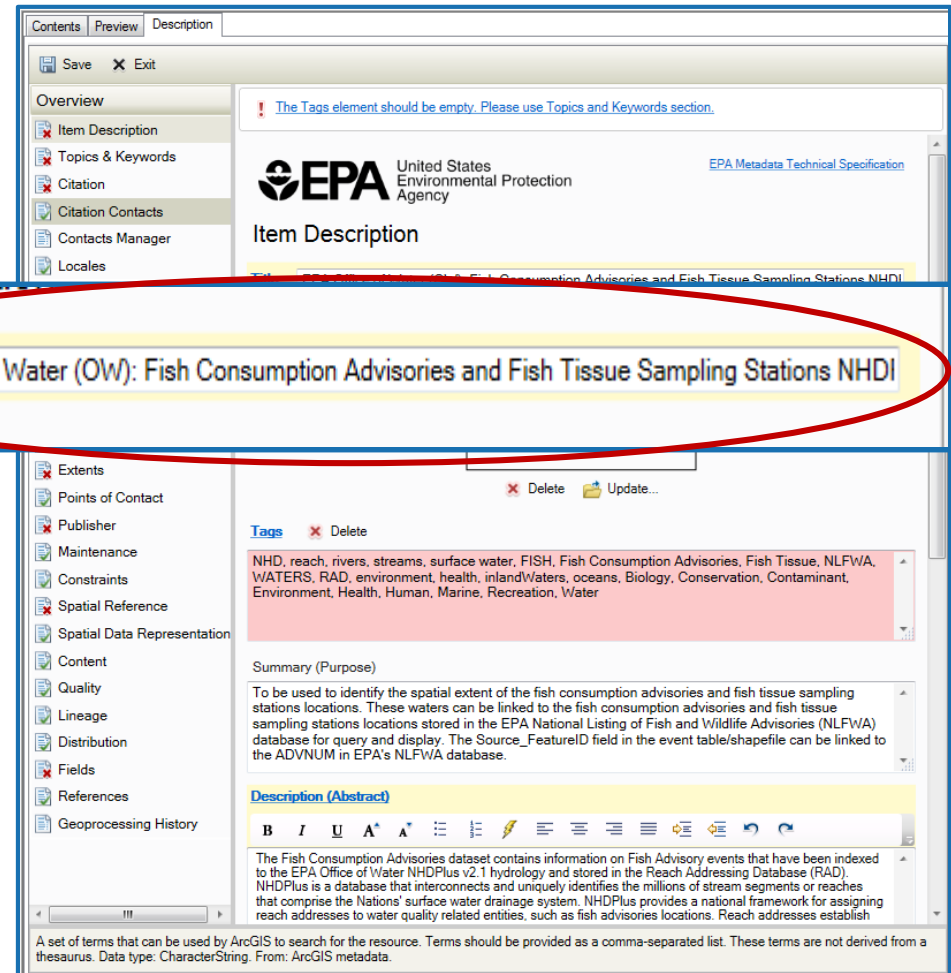- Invalid text fields needing correction are shaded in pink or peach within the *Editing pane*
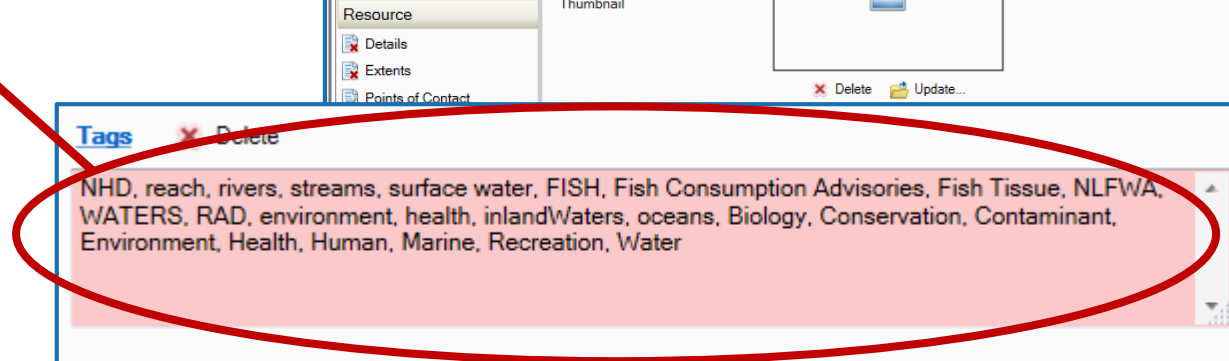
Note: dropdown and date fields do not support this coloring

EME v5.0: Getting Started

EME 5.0 Interface :

- Mandatory metadata fields are shaded in light yellow.

Note: mandatory fields may not be visible at first glance, because it is possible they are found in an expandable section

Contacts Manager:

- Provides a list of pre-populated EPA Contacts
- Lists any contacts that are included in the current metadata document
- Local Contacts file can be shared with Colleagues
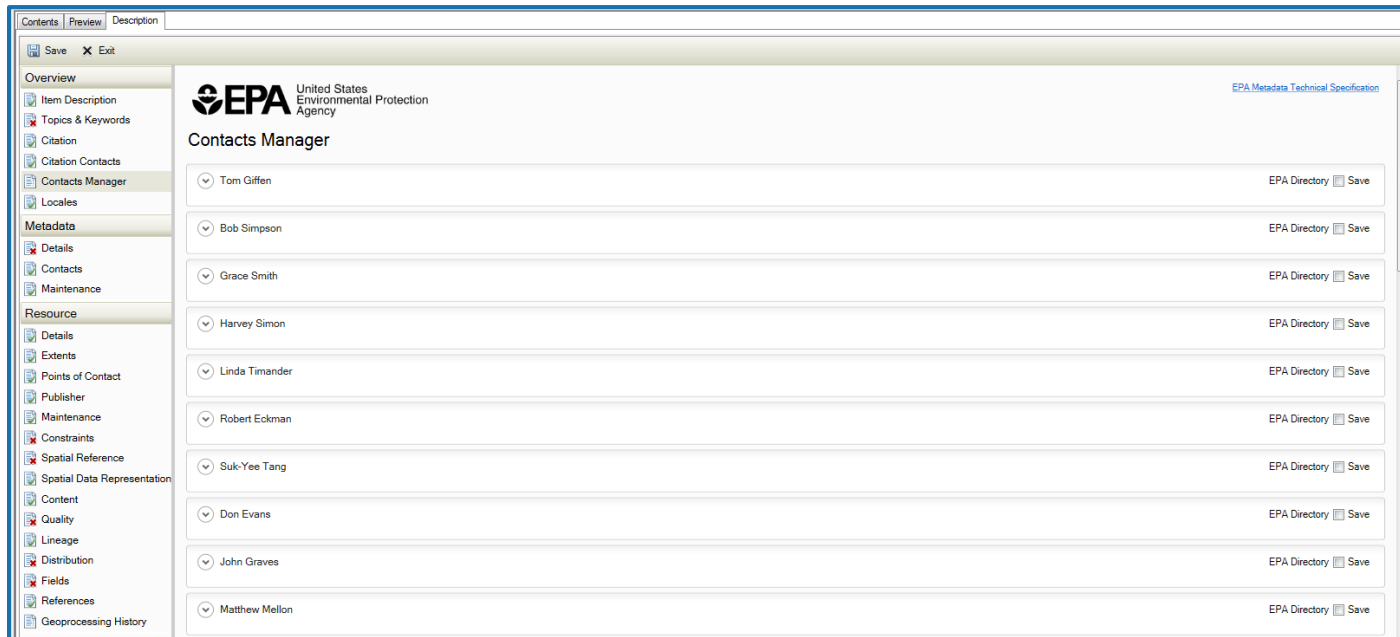
Note: Contact Details cannot be edited in the Contacts Manager page

Contacts Manager – Editing Contacts:

1. Add contact to the metadata document in one of the following locations:
   - Citation Contacts
   - Metadata Contacts
   - Resource Points of Contact
2. Select the name of the metadata contact from the dropdown list and click Load.

EME v5.0: Getting Started
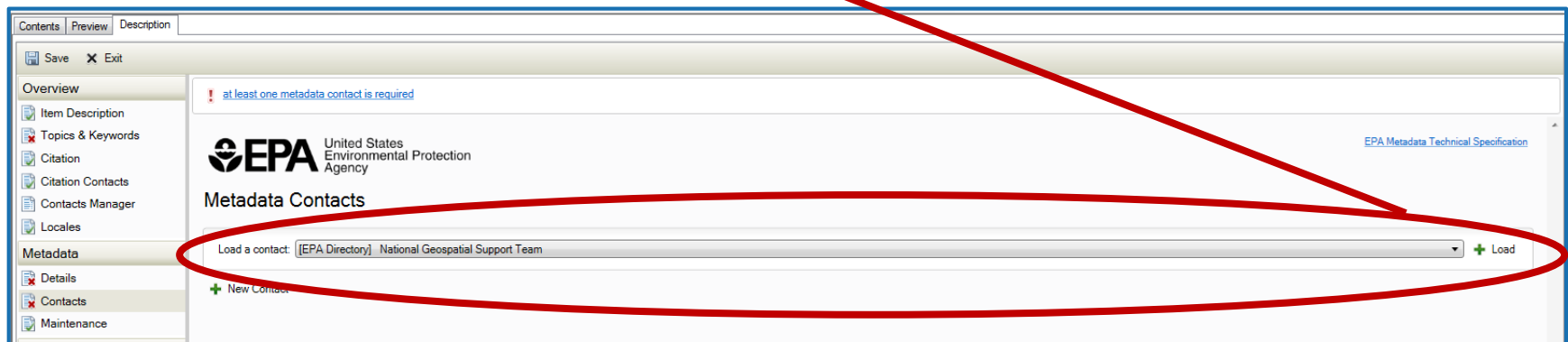
Contacts Manager – Editing Contacts:

3. When a contact is loaded, you can expand the section by clicking each down arrow

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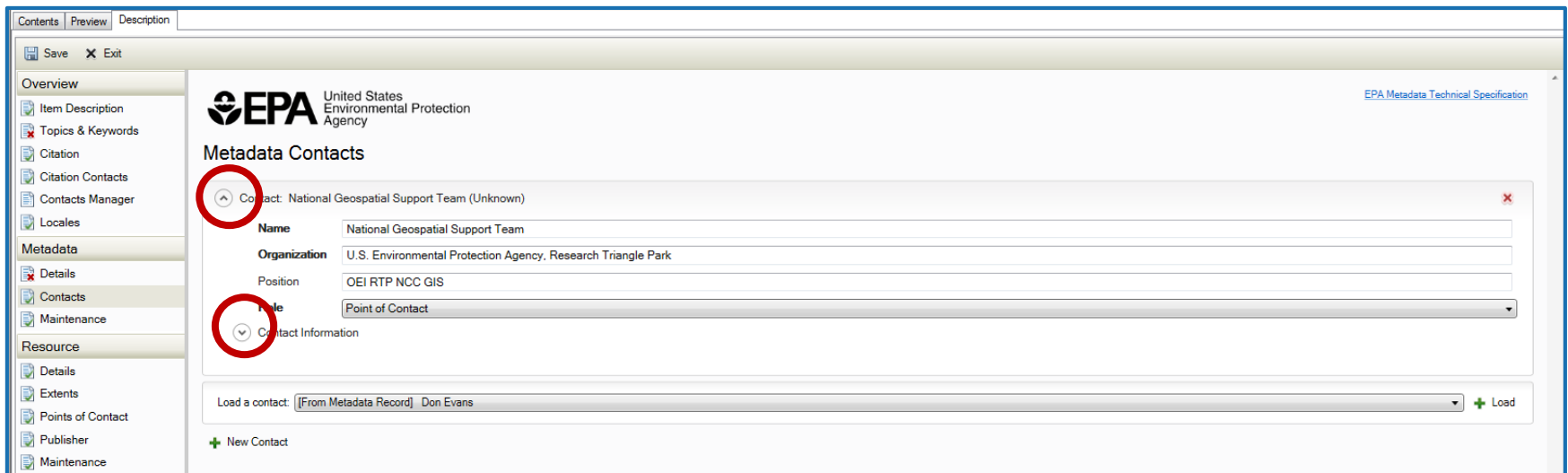
Contacts Manager – Editing Contacts:

4. New version of contact will appear at the bottom of the Contacts Manager Page
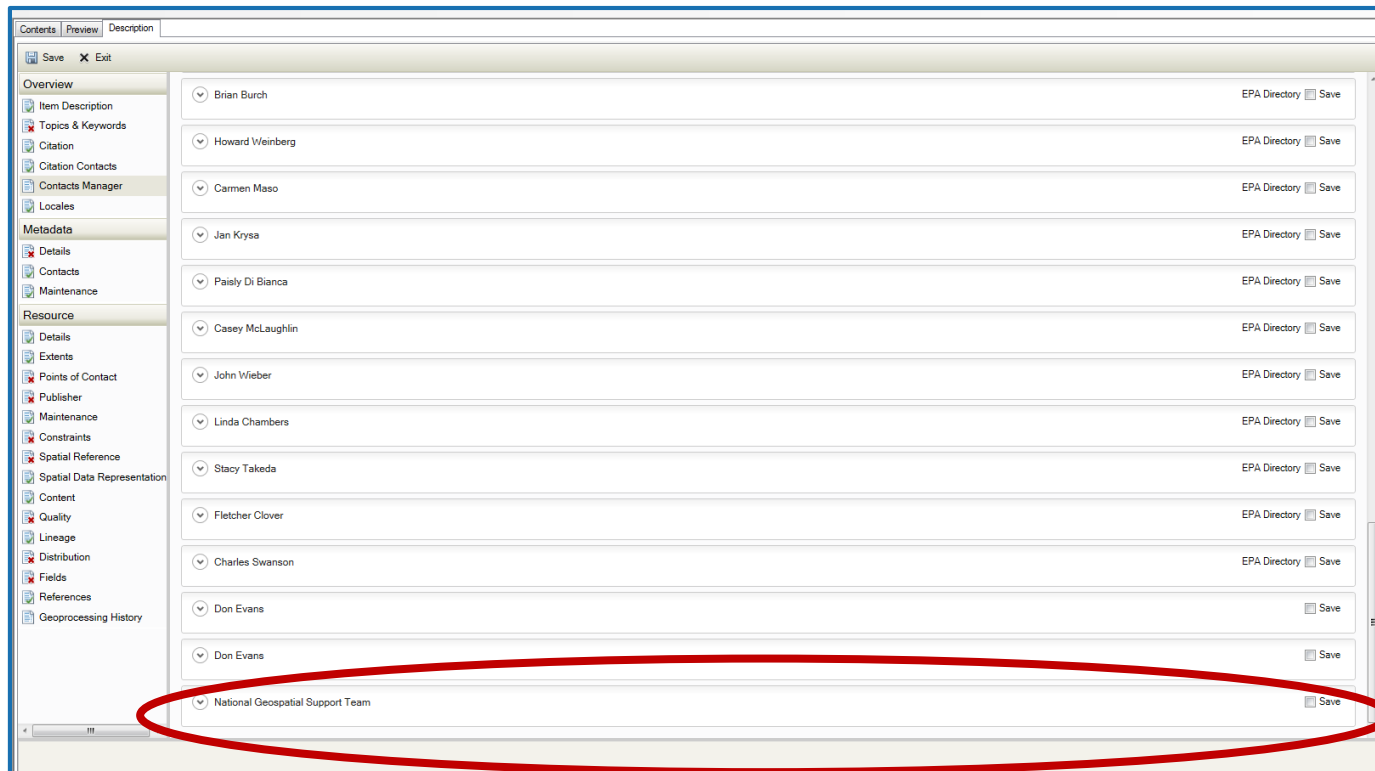
EME v5.0: Getting Started

Database Manager

- No longer an MS Access Database
- Standalone Application found in Start Menu
- Used to manage Keywords, System of Records, and Security Constraints fields

EME v5.0: Getting Started
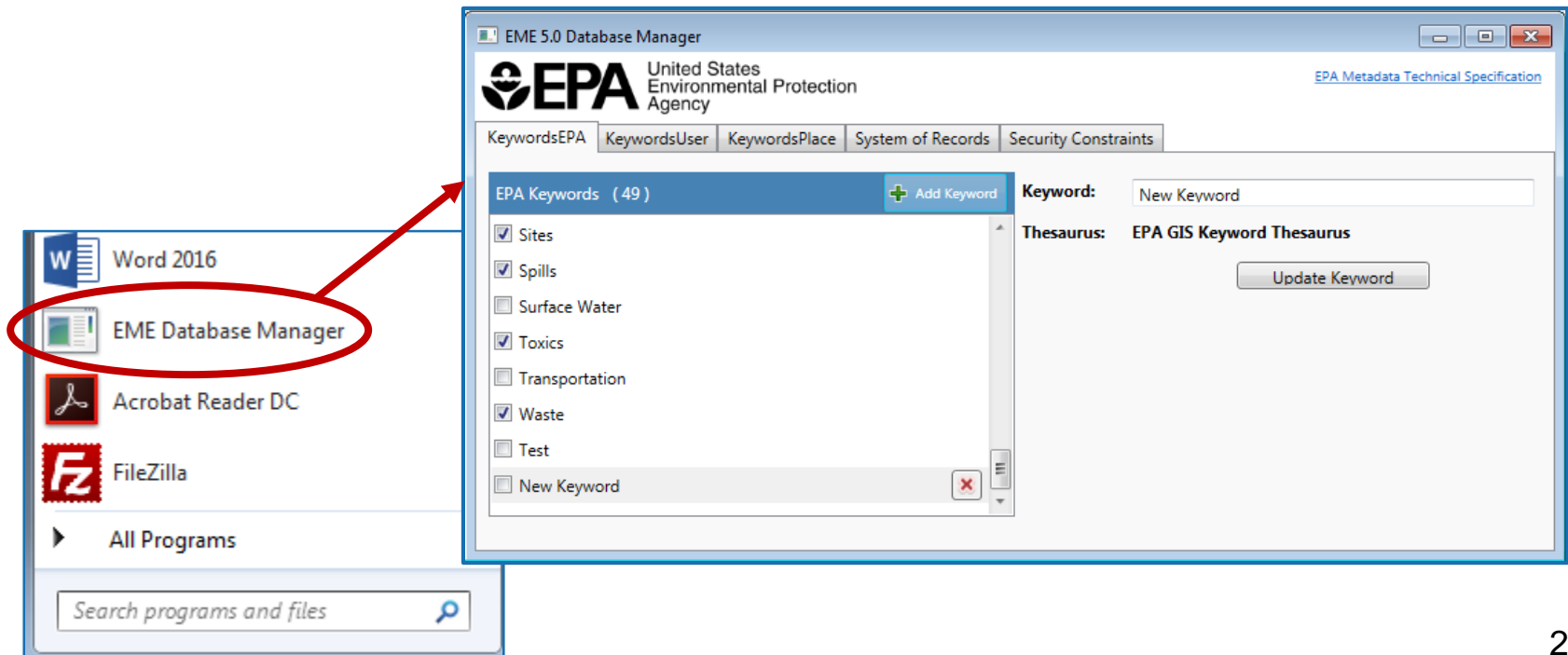
Database Manager – Editing Defaults

1. Click *Add Keyword or Add Constraint (depending on tab)*

2. Add Keyword or Constraint in text box and click *Update*
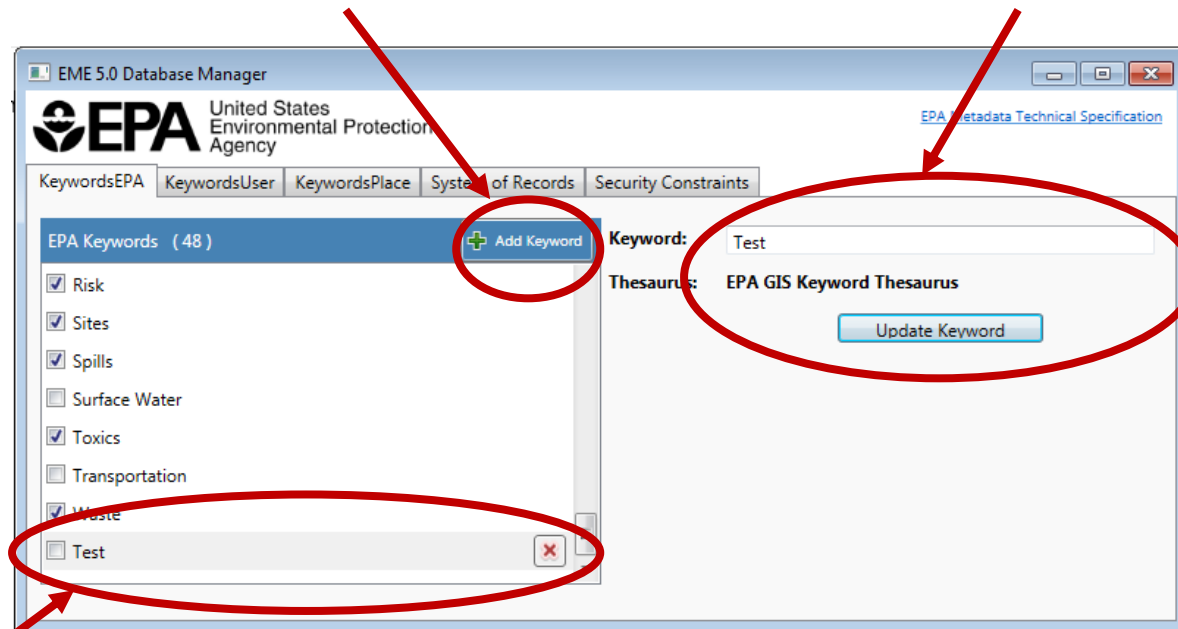
3. New entry appears at the bottom of the defaults list

EME v5.0: Getting Started

EME 5.0 Help:

- Mandatory fields link directly to their detailed guidance in the [EPA Metadata Technical Specification](#).

- A link to the complete EPA Metadata Technical Specification can be found in the top right corner of the Editing pane.

EME v5.0: Getting Started

EME 5.0 Help:

- The ⓘ icon next to a field name links directly to that field's detailed guidance in the EPA Geospatial Metadata Style Guide using EME 5.

EME v5.0: Validation Tips

Validation Tips:

- When edits are made EME 5.0 automatically updates the "Date Stamp" field.
- Do not use the "*Validation*" button when validating metadata (it happens in real time)
- Do not include "Tags" in the Item Description page. Include them in the Topics and Keywords page
- Make appropriate Program Code selection from the OMB list within the Topics and Keywords page.
- More Validation Tips can be found on the <u>EME 5.0 wiki</u>

EME v5.0: ArcGIS Metadata, EDG & Data.gov

ArcGIS Metadata, EDG and Data.gov

- EDG Handles ArcGIS Metadata records the same as FGDC CSDGM records
    - Can be harvested to the EDG from the same Web Accessible Folders
    - Appearance within EDG will be similar to old records
- EDG performs a transformation on records to put them in ISO 19115 for data.gov harvests
    - Will improve behavior and appearance at data.gov

DEMO

EME v5.0: *Important URLS*

Download EME 5.0 –

- https://github.com/USEPA/EPA-Metadata-Editor-5/releases

EME 5.0 Fact Sheet –

- https://edg.epa.gov/data/Public/OEI/EMEv5Files/EME5_FactSheet_20170306.pdf

EME 5.0 Installation Guide –

- https://github.com/USEPA/EPA-Metadata-Editor-5/wiki

EME 5.0 Metadata Style Guide -

- https://www.epa.gov/geospatial/epa-geospatial-metadata-style-guide-using-eme-5

Questions/Help, email: edg@epa.gov

Questions?

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