#### National Archives and Records Administration

Federal Records Management Level 1: Creation and Receipt

Participant Guide

Module 6:

Assigning Metadata Based on Pre-Existing Standards

and Creation & Receipt Course Wrap-Up

Table of Contents

[Module 6: Assigning Metadata Based on Pre-Existing Standards 3](#_Toc14241978)

[Module 6 Checklist 3](#_Toc14241979)

[Task Goal 3](#_Toc14241980)

[Task Objectives 3](#_Toc14241981)

[Why Metadata? 3](#_Toc14241982)

[Metadata Standards – NARA Requirements for Permanent Records 4](#_Toc14241983)

[Activity: My Metadata 5](#_Toc14241984)

[More Metadata Examples 6](#_Toc14241985)

[Metadata for Digital Photographs 6](#_Toc14241986)

[Metadata for Email 6](#_Toc14241987)

[End of *Assigning Metadata* Module Wrap-Up 7](#_Toc14241988)

[End of Creation & Receipt Course Activities 9](#_Toc14241989)

[Action Plan: Putting the Pieces Together 9](#_Toc14241990)

[Action Plan: Next Steps 10](#_Toc14241991)

[Action Plan: Partners and Resources 10](#_Toc14241992)

# Module 6: Assigning Metadata Based on Pre-Existing Standards

## Module 6 Checklist

* Complete the online module.
* Complete the end of course Action Plan: Putting the Pieces Together assignment.

## Task Goal

Given a set of your own records, you will be able to add metadata to them as required by pre-existing standards.

### Task Objectives

* Explain why metadata elements are added to files.
* Identify the metadata required by your office and/or NARA guidelines for various types of files.
* Demonstrate how to create metadata for a typical work-related file.

## Why Metadata?

Manage

Find/Retrieve

Understand

Use & Preserve

## Metadata Standards – NARA Requirements for Permanent Records

Find definitions, description, and more information on NARA Bulletin 2015-04 on NARA’s website: <https://www.archives.gov/records-mgmt/bulletins/2015/2015-04.html>

* Identifier (File Name)
* Identifier (Record ID)
* Title
* Description
* Creator
* Creation Date
* Rights
* Coverage
* Relation

## Activity: My Metadata

Think of a document you might create in your own job. Use the metadata fields in the Summary and Properties screen shots below to provide the metadata information you would enter into the file. If there are fields for which you do not have information, leave them blank.

| **Metadata** | **Value** |
| --- | --- |
| Identifier (File Name) |  |
| Identifier (Record ID) |  |
| Title |  |
| Description (Subject) |  |
| Creator |  |
| Creation Date |  |
| Rights |  |
| Coverage |  |
| Relation |  |

Additional metadata used by your program with this type of information:

## More Metadata Examples

### Metadata for Digital Photographs

Sample fields from the IPTC (International Press Telecommunications Council) photo metadata standard that help document the content:

* Location shown in image
* Event depicted in the image
* Person shown in image
* Source type (created by software, original digital capture of a real life scene, digitized from film)
* Creator
* Copyright Owner
* Content Description

Sample fields for technical metadata for photographs (EXIF Exchangeable Image File) standard:

* Camera Make
* Camera Model
* Shutter Speed
* Aperture
* Exposure Time
* Original photograph’s date and time
* Date the photograph was digitized

For more information on IPTC, EXIF, and other photo metadata standards:

<https://iptc.org/standards/photo-metadata/> [https://photographylife.com/what-is-exif-data](https://photographylife.com/what-is-exif-data" \o "Article from Photography Life on EXIF data)

[http://www.photometadata.org](http://www.photometadata.org/)

### Metadata for Email

* Name/email address of sender
* Name/email address of addressee(s)
* Distribution list
* Subject
* Date and Time

## End of *Assigning Metadata* Module Wrap-Up

Share your work from the *My Metadata* exercise with your course instructor(s), if appropriate. If you are working on your own, share your work with a colleague and discuss what metadata fields your team is already assigning, and which fields your team should consider adding to important electronic records.

[This page intentionally left blank.]

# End of Creation & Receipt Course Activities

## Action Plan: Putting the Pieces Together

Use the following questions to review what we covered in this lesson and build an action plan for your next steps. If you don’t have the answers to a question, make notes about the people and resources who could help you.

My Agency Records Officer and records management team are:

Our records management policies and procedures can be found here:

My records schedules and file plans can be found here:

Key elements of the records lifecycle I need to discuss with my office are:

Important record types for my program:

Nonrecords we need to manage:

I need to review file labeling and e-file naming guidance for these types of records:

Our metadata rules are:

## Action Plan: Next Steps

Use the space below to record any next steps you need to take. What conversations do you need to have? What types of records need to be addressed first?

## Action Plan: Partners and Resources

Use the space below to brainstorm any available partners and resources who can help you and your program with records management.