

KNOWLEDGE
IS HERE

Metadata – Development of Records Management Metadata Standard at Library and Archives Canada

GC Record Management Metadata

Rhonda Healey CRM – February 2006



Library and Archives
Canada

Bibliothèque et Archives
Canada

Canada

Background

KNOWLEDGE
IS HERE

- Metadata is not a new concept
- Librarians, Archivists, Web people use it and Records Managers now!
- Metadata : “data describing the context, content and structure of records and their management through time” ISO 15489

2



Library and Archives
Canada

Bibliothèque et Archives
Canada

Canada

History

KNOWLEDGE
IS HERE

- The Draft Records Management Metadata Standard – 2001
- Information Management Forum reviewed a metadata set
- Revised Draft RM Metadata Standard – 2006
- RDIMS funding – Inter-departmental, departments, consultants, and central agencies – started in Dec. 2004



Challenge – is RM and IM the same?

If not, what is different?

We must think of the broad IM?

Who is responsible? Why?

Metadata

KNOWLEDGE
IS HERE

- Where does it fit?
- RM, CM, DM ?



Challenges – Link the information

KNOWLEDGE
IS HERE

- Different organizations present the information in a variety of ways
- How do we make the link?
- Look at opportunities to change the outcomes and re-use information available?
- Identify and think not only process change but innovation
- Metadata can help !!

6



Library and Archives
Canada

Bibliothèque et Archives
Canada

Canada

Why is Metadata linked to Records Management?

KNOWLEDGE
IS HERE

- Interoperability enterprise-wide within your institution and also across government
- Re-use and re-purpose information
- A form of metadata language used to identify, describe and classify documents and files
- Used to record documents and files in a documentary space
- Key elements for finding documents and files

7



Library and Archives
Canada

Bibliothèque et Archives
Canada

Canada

Useful Tool

- Electronic records, can help protect the integrity, authenticity and reliability of document and files through the life-cycle
- Assist in retaining context
- Assist with records scheduling

Metadata – What is it about?

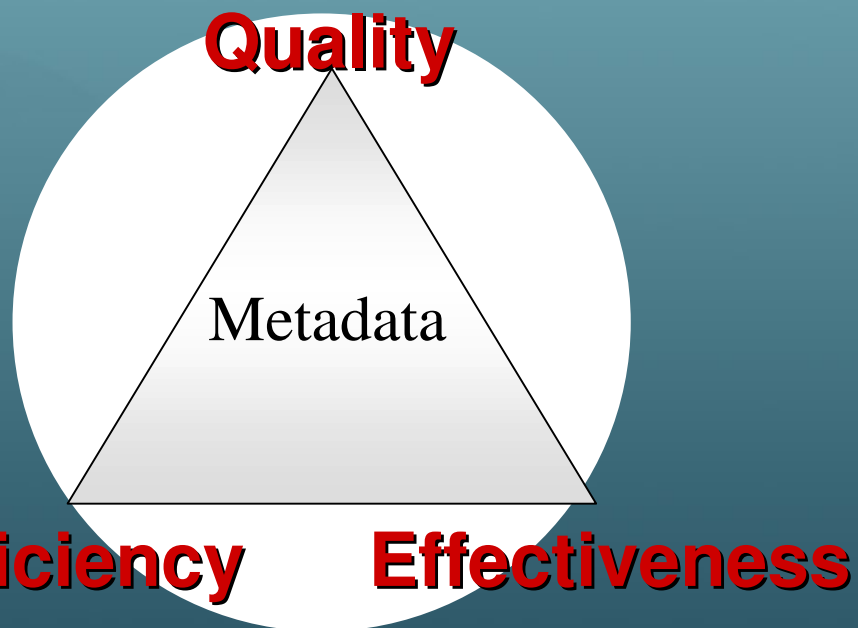
- **Information about information**
 - NOT about IT
 - NOT about file classification
 - IS about Content
 - IS about Retrievability
 - IS about Accountability
 - IS about the need to make Informed Decisions
 - IS about having the right information, at the right time, at the right cost

What is in it for you?

- Metadata Protects you – everyday decisions on information, life-cycle management
- What you think is your work – is everyone's work - information must be organized to enable others to do their job – using the same information – innovation and process
- We need: right information, right time, right cost = informed decisions
Citizens, business and courts demand **it!**

Metadata is an Enabler

KNOWLEDGE
IS HERE



Email

Web

Records



Proposed RM Metadata Standard

- **Records Management Metadata Standard (RMMS)**

- Objective: to develop a standard for a records management metadata scheme (RMMS), which will be both broad and flexible enough to accommodate the needs of the GC institutions to describe electronic and paper (hybrid) systems.

Metadata – How does it help?

KNOWLEDGE
IS HERE

- **Data must be captured along with electronic records to enable them to be understood and to support their management use.**
 - Metadata assists with the retrieval of records.
 - Metadata improves the management of records.
 - Metadata is necessary to document the content, context and structure of a record.
 - Metadata is used to document transactions relating to a record.

13



Library and Archives
Canada

Bibliothèque et Archives
Canada

Canada

Horizontal Government and Convergence

KNOWLEDGE
IS HERE

- Information is best shared between systems, or accessed by multiple systems, when it has good metadata.

Horizontal Government and Convergence

(http://www.cio-dpi.gc.ca/fap-paf/index_e.as)



RM Metadata Standard

KNOWLEDGE
IS HERE

- Records Management Metadata - content, structure and appearance of records
- Assist in understanding environment
- Reliability of the records business /purpose
- Relationships with other records or record aggregations
- Demonstrate the life of a record –documenting processes of use – preservation, authenticity, integrity

15



Library and Archives
Canada

Bibliothèque et Archives
Canada

Canada

Alignment with other Standards

KNOWLEDGE
IS HERE

- Dublin Core
- ISO 15489 – Information Documentation –RM
- ISO 23081-1 – Information Document for Records Management Processes - Metadata for Records – Part 1: Principles
- TBITS 39.1 & 39.2 - TBS-GOL DC Metadata Standard for GC and Controlled Vocabularies
- Context of RDIMS shared solutions for GoC
Application: government institutions list in Schedule 1 – ATIP or designated by Governor-in-Council

16



Library and Archives
Canada

Bibliothèque et Archives
Canada

Canada

Next Steps

KNOWLEDGE
IS HERE

Finalize the proposed RM Metadata Standard – and GC Metadata Application Profile – Endorsed Jan 2006

Test and Communicate - 2006

Build an Executive Correspondence Metadata Profile – March 2006

Feasibility report to review the requirements for Case Files – Metadata March 2006

Continue to build awareness of the necessity of RM Metadata in context of metadata in GC

Work closely with GOL Metadata Working Group –TBS

17



Library and Archives
Canada

Bibliothèque et Archives
Canada

Canada

Links to other processes

KNOWLEDGE
IS HERE

- Content Management Systems
- Document Management Systems
- Library, Web, Business Systems, etc
- Others



Challenges

KNOWLEDGE
IS HERE

- Ensure that all departments are aware of the necessity to use metadata consistently
- Ensure that repositories are linked so information is consistent
- Ensure we look at the Government of Canada as one enterprise not individual organizations
- Ensure that document management, content management are also aligned with the RM Metadata standard where applicable

19



Library and Archives
Canada

Bibliothèque et Archives
Canada

Canada

Interoperability

KNOWLEDGE
IS HERE

- Align common themes within each institution to inform the focus of the Government of Canada – to increase service
- Align the elements between business and IM domains that allow exchange of information and meet service delivery
- Align information management requirements to support the business of government

20



Library and Archives
Canada

Bibliothèque et Archives
Canada

Canada

Common Naming Conventions

KNOWLEDGE
IS HERE

- Schemes be developed for common business themes that are universal
- Assist in finding information for clients both internally and externally
- Common terms for communities with similar requirements – links for clarification

21



Library and Archives
Canada

Bibliothèque et Archives
Canada

Canada

Conclusion

- Please continue to review your organization's progress
- Let others know what you know!

Thank You!



Contacts

KNOWLEDGE
IS HERE

Rhonda Healey, CRM

Tel: (819) 934-7436

E-mail: rhonda.healey@lac-bac.gc.ca

Information Management Centre – (819) 934-7519

imgi@lac-bac.gc.ca

www.collectionscanada.ca

23



Library and Archives
Canada

Bibliothèque et Archives
Canada

Canada