The Electronic Documents of Illinois Metadata Generator

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Using the Metadata Generator

Electronic Documents of Illinois

The Electronic Documents of Illinois (EDI) stores state agency documents and makes them accessible forever.

URLs

Metadata Generator—http://www.finditillinois.org/metadata

Keyword Search EDI— http://www.idaillinois.org/cdm/landingpage/collection/edi

Search EDI by State Agencies— http://www.ediillinois.org

What is a Document?

Documents will exist in the depository as cohesive units. Each unit will have metadata describing it. Information in the metadata will help access and preserve the file(s) that comprise the document. Here are some examples:

- <u>Bicycle Rules of the Road</u> is complete in one PDF file
- <u>Illinois Handbook of Government</u> consists of several PDF files that comprise the electronic version of a single document
- Illinois State Fair press releases

What to Deposit

Here is a summary of which documents to add to the depository

Deposit	Do Not Deposit
Public Documents	Unconverted Web pages
Final version for release	Documents Exempt from the
to the public	Freedom of Information Act
Documents for sale	Internal memorandums
Copyrighted Documents	Working drafts not "published"
	E-mail
	Individual forms
	Ephemera
Examples:	
Annual Reports	
Newsletters	
Bulletins	
Brochures	
Fact Sheets	
Press Releases	
	Conference announcements
Approved Budget	Working budgets or drafts

The Metadata Generator

The Metadata Generator allows you to create metadata by populating a simple form. Go to the **login screen** of the Metadata Generator at:

http://www.finditillinois.org/metadata



A Login and password are required to use the Generator. Enter your login (case sensitive) and password and then click, "Login to the Metadata Generator."

Metadata Templates Opening Screen Create a new template Edit a template Use a template Use a template Use a template View a record Polite a record Polite a record Delete a record Use was a record View a record View a record Pround files Logout Help Using the Generator Depositing Documents An Overview of the Process More Information E-Mail Us

217-524-6313

The Main MenuThe main menu is always on the left side of your screen.

The buttons on the top allow you to create and change **Metadata Templates** that are stored in your account. Templates contain metadata that can be used repeatedly to develop individual records.

The next set of buttons control **Metadata Records** for creating an individual document without the use of a template.

The buttons on the bottom allow you to maintain **your account**, access online **help**, **log out** from the main menu, or to **upload** amended documents to the depository.

Let's start by clicking on "Create a new template," and discuss the metadata fields of templates and records.

Section 1: Basic Properties about your Publication

It is important that the information in Section 1 describes the specific document that you are submitting. If you have an ongoing publication, make sure that you describe the specific issue.

Clicking on "?" at any point on this form will take you to context-sensitive help.

Templates and Records are closely related. Templates contain metadata that you use repeatedly, so you can utilize your templates instead of constantly re-keying. You can develop an unlimited number of templates, so each one will need a name—the first field (box) to fill-in when you are making a new template:



Publication Title

Enter the title exactly as it appears on the document. This is the title by which the user will know the document. Copy and paste it from the document.



Keywords

Keyword searching is a primary method of access for all users. Certain data fields are automatically included in the keyword access for any document, such as title and description. In this field, enter other keywords or key phrases for your document, including:

- Agency initials (ISBE, DCFS, IDPH...) and acronyms related to the document
- Common subject terms in your publication and their synonyms
- Alternate titles (document titles often change over time)
- Important personal names that appear on your document
- Alternate spellings and common misspellings



Description

The description summarizes the content and purpose of the publication. It should be two to four sentences and less than 100 words. Feel free to copy and paste the description from another

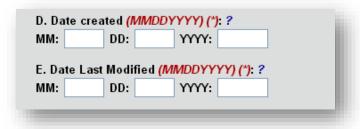


source. The EDI search engine does not index the complete text of the publication, but it does index the description. A concise, complete description of your publication is important.

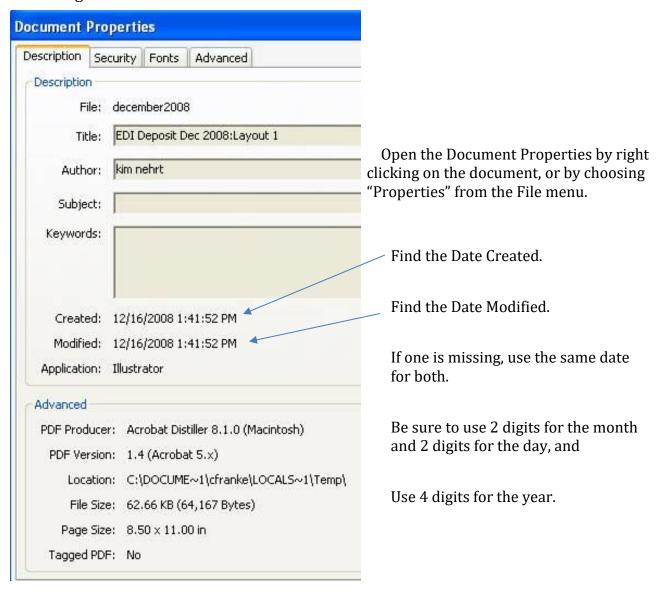
Date Created and Date Modified

Dates are critical for sorting different versions of documents. Date Created is when the document was officially released to the public. It corresponds with publication date for a printed document.

Date Modified will often be the same as Date Created except when the contents of the document are revised and reissued. Two different dates in these fields means that the content of the documents is different or that the file format has changed. Use MM (month), DD (Day), YYYY(year): example, 02/06/2014

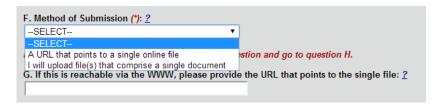


Finding Dates for a PDF File



Submission Choices

There are two methods of submitting a document to the depository. The one to choose depends on the document. Documents composed of multiple files will need to be



uploaded after you create metadata. That process is explained below. At this point you only need to indicate that you will upload the document file(s) after you create the metadata record. Software and version information are supplied individually for each file as you upload it.

```
F. Method of Submission (*): ?

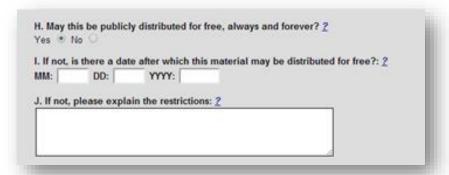
I will upload file(s) that comprise a single document ▼

Note! If you are UPLOADING file(s), skip the next question and go to question H.

G. If this is reachable via the WWW, please provide the URL that points to the single file: ?
```

Copyright Information

Most documents issued by state agencies are public documents with no restrictions on their use. Therefore, the default answer to the question "May this be publicly distributed for free, always and forever?" is "Yes."

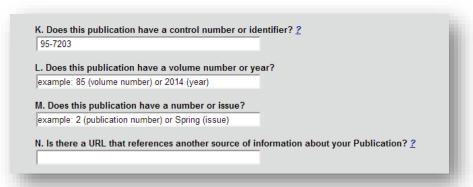


If a document or portions of its contents contain copyrighted information, such as photographs, click the radio button to change the answer to "No" and fill-in the date that the copyright will expire, and explain this in J.

If your agency sells the document and it is not available for free distribution over the Internet, click the radio button to change the answer to "No" and explain this in a note. If, after a certain period of time your agency wishes to make the document available free of charge over the Internet, enter the date after which it will be available free of charge.

Control Numbers

Frequently, government documents have control numbers that aid the agency with tracking and distribution. Enter control numbers to help identify the document. Some are numbers assigned by the agency.



Document Numbering

Issues of *Illinois Libraries* have both numbers and dates. When both are present, enter the number. The date information is available in other fields. Also, do not label the number. The depository will sort serial issues by the numbers in these fields. Prefixes, like "Vol." will only throw off the sorting and cause problems with arranging the issues in the proper order. Enter only numbers or dates in these fields. Look for words in the title that indicate frequency, like annual report. Remember; do not enter the date in the title.

Vol. 85, No. 2 Spring 2004

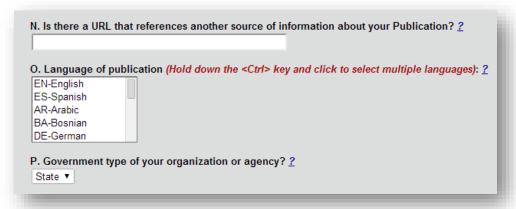
ILLINOIS LIBRARIES

EDUCATIONAL MANDATES

Annual Report -- 2002

Related URL

Enter a Web source where the user can find additional information related to your document. This URL will display as an active link within the metadata for this document in the depository. It will remain in the depository at least as long as the Library is able to preserve your document. Do not enter a URL that will not be available on the Web for a long time, and do not enter the Web address of the document you're submitting. The depository is designed to keep your document available when it is no longer available on your Web site.



Language

The default for language is English because most documents are issued in English. If your document is in another language, use the pull down menu to select the correct language for the publication.

Level of Government Publication

The default for government type is *State*. *State* agencies means: any state office, officer, department, division, section, unit, service, bureau, board, commission, committee, subdivision of branches, university, or agencies that expends appropriations of state funds.

Section 2: Contact Information

The information needed by the Metadata Generator is organizational address, city, zip code, and phone number (including the area code).



Section 3: Issuing Agency

Your agency selection has been assigned to you. If you need Departments within your agency added to your selection, please contact William Echelbarger, 217-524-6313 (wechelbarger@ilsos.net). If you have more than one agency or department in your selection, you will have a dropdown box.

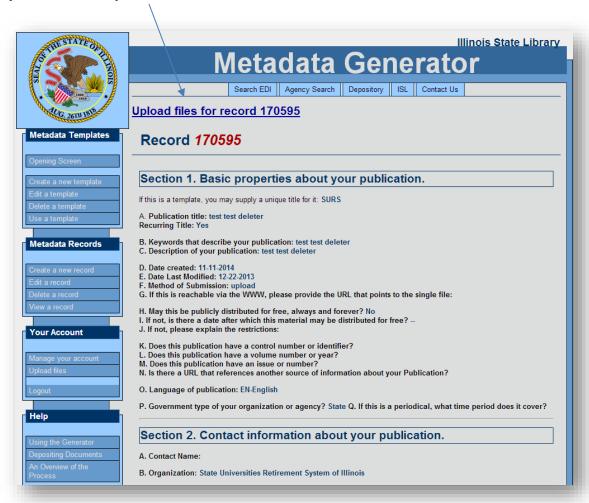
Bottom of the Form

There is a button at the bottom to submit your form. It changes depending on what you are working on at the time. So, if you're making a new template it'll say, "Submit a new template." When you modify a template, it'll say, "Edit this template."

However, when you create a record ("Use this template to make a new record") and you are physically uploading a document with all required fields completed, a screen appears with your completed metadata. If the required fields are not correctly filled-in, you will receive an error message.

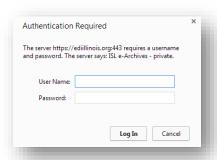
Uploading Files

To attach and upload your document with its metadata, click "Upload files for record (record number)."



A new window will appear with the upload form. At this point you get switched to a new server for the file transfer and you have to put in your EDI username and password again. But you only have to do this once per session.

Please note that if you have multiple files that constitute a single document, you will need to upload the files consecutively. Please email me if you need to do this. It's fairly intuitive, but lends itself to explanation, and it's rare, so it's not covered in this session.



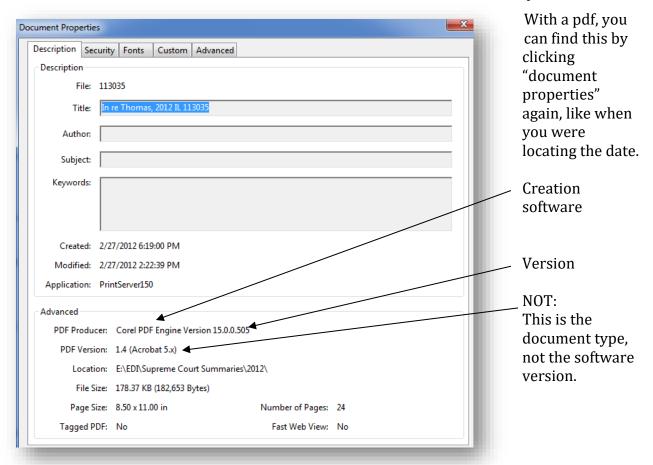
The Metadata **Record Number** is automatically filled in. Please do not change it!

Click on *Browse* and select the file you want to upload.

Enter the title of the document where it says, "Brief description of file contents or purpose."

Enter the name of the software used to create this file. The same software might not have been used to create all of the files for one document. This information is critical to maintaining files for the long-term: "Microsoft Office Word," or "Adobe PDF Creator."

Enter the version of the software. "2007," "97-2003," or "8.0.1" for example.



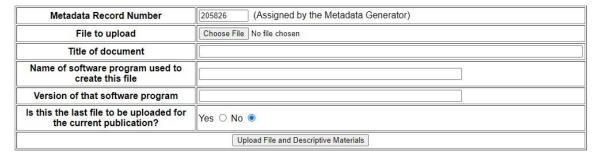
Microsoft Office Word documents that end with .doc are version 97-2003, while .docx files are version 2007 or 2010. Word can be the creation software for pdfs as well.



This is the uploading utility for files described in metadata records created in the ISL Metadata Generator. Using this page, you can upload the files (one or more) that are part of a single publication described in a metadata record. The Electronic Documents Initiative makes no assurance that scripts will function if deposited.

Tips for a successful upload:

- . Upload files in the order you want them presented to the users. If one of the files is the title page or a menu page that serves as a table of contents, that file should be the one uploaded first.
- · Write a helpful, brief description of the file since the description will be displayed in a menu for users in the depository along with the record
- · Check each file for the software program and version since they may be different for each file.
- · Check whether the file is the last one to be uploaded.



Change the radio button to Yes, indicating you are uploading the last, or only, file. Once you click this button you will no longer be able to submit files for this document. On the other hand, if you don't indicate that you are finished uploading files, your document will sit in pending files waiting for the final file before processing.

If you are unable to upload files immediately, it can be done later from the Upload button on the main menu. You will need to fill-in the metadata record number when you access uploading files from the main menu.

To find the metadata record number, click *Veiw Records* on the main menu. Click *View* to change or view your record.

Making Changes

If you want to change your metadata after you've submitted it to the depository, you will need to follow different procedures depending on the processing status of your record. The status of your record will display under the listing for the record in the edit record list. To



view the list click *Edit Record*.

> Edit this will display under the listing for each record in the edit record list. Records created that day can still be changed and will display at the top of the list. Your changes will be saved and submitted with your document when it's transferred

from the pending file into the depository. You have a day or two to modify records.

Once your record has begun being transferred to the depository, you cannot make changes and the Metadata Generator will indicate so with the message: *Your record cannot be edited at this time as it is in processing.*

Templates

Templates save inputting time. Whenever fields are the same from record to record, you can begin with a template where the repeated fields are already completed. Templates only appear in the account in which they are made, so create as many as you need.

Begin on the main menu. Click *Create Template*. Since this is the first template that you are creating, you will be taken directly to an empty data form. Otherwise, you could choose an existing template in your list, and click on *Use a Template* as the basis for your new template. Creating one template from another will result in two templates.

Appendix 1

The Illinois Administrative Code, Title 23, Subtitle B, Chapter 1

Section 3020.100, Definitions (truncated)

"Metadata" means structured information that describes content, origin, format and other key characteristics of data for the purpose of information management.

"Metadata generator" means the Web-based resource used by State agencies to submit URLs, metadata and electronic versions of published materials to the Illinois State Library.

"Microforms" means any medium bearing microimages, such as microfiche or microfilm.

"Publications" means all formats of media, including microforms, recordings, and other printed material paid for in whole or in part by funds appropriated by the General Assembly or issued at the request of a State agency, excepting however, correspondence, interoffice memoranda, and confidential publications. Publications to be deposited with the Illinois State Library and the electronic depository include, but are not limited to, the following:

- Annual Reports
- Bulletins/Circulars
- Handbooks/Manuals
- Laws/Rules/Decisions
- Maps/Charts

- Newsletters
- Pamphlets/Brochures/Fact Sheets
- Press Releases Issued by Constitutional Officers
- Technical/Research/Statistical Reports

Section 3020.110 State Agency Publications

- a, 4) Electronic deposit is required for copyrighted and priced publications. Internet availability of copyrighted and priced publications will be determined by the depositing State agency.
- b) The issuing agency shall notify the Illinois State Library of an electronic-only publication by submitting the publication and metadata describing the publication to the electronic depository via the Illinois State Library's metadata generator.
- c) One electronic copy shall be provided to the Illinois State Library of all published materials as defined in this Part in a format acceptable to the Illinois State Library, including, but not limited to, the following: 1) Microsoft Office file, 2) Plain text file, 3) Adobe Acrobat, 4) Video (mpeg) or sound (wav), 5) Image files (JPEG, TIFF), 6) Formats in compliance with the Illinois Web Accessibility Standards.
- d) In formats where applicable (such as HTML), electronic-only publications shall include metadata embedded in the file posted on a publicly accessible network as submitted to the electronic depository via the Illinois State Library's metadata generator.

Appendix 2

Illinois Document Depository Program (IDDP) Core List

Illinois Documents Deposits:

- All publications need to be deposited electronically via the ISL Metadata Generator.
- Where there is a print copy, publications need to be deposited electronically and two copies of the print sent to the ISL Government Documents Section.
- Publications listed on the IDDP Core List need to be deposited electronically and 26 copies need to be sent to the ISL Government Documents Section.

ALL MAPS

ALL ANNUAL REPORTS

COMMERCE AND ECONOMIC OPPORTUNITY

- Illinois Property Tax Rate and Levy Manual / Department of Commerce and Community Affairs, Local Government Management Services
- Proposal Writing: the Basic Steps in Planning and Writing a Successful Grant Application
- Starting Your Business in Illinois Handbook / Illinois Department of Commerce and Economic Opportunity, Illinois Entrepreneurship Network
- Comenzando su negocio en Illinois manual

COMMISSION ON INTERGOVERNMENTAL COOPERATION

• Catalog of State Assistance to Local Governments

COMPTROLLER

• SAMS: Statewide Accounting Management System

CORRECTIONS

• Quarterly Reports

EDUCATION, STATE BOARD OF

- Constitution Study Guide of the State of Illinois and United States
- Guía de estudio la Constitución del Estado de Illinois y de los Estados Unidos
- Teacher Basic Skills Study Guides
- Annual Statistical Report of the State Board of Education
- Private Business and Vocational Schools: School Visitation and Complaint Report to the Legislature

ELECTIONS, STATE BOARD OF

- A Guide for Poll Watchers
- State of Illinois: County officers
- Federal and state officers / issued by the State Board of Elections
- State of Illinois official vote cast at the general election...
- State of Illinois official vote cast at the primary election held on...

ENVIRONMENTAL PROTECTION AGENCY

- Site Reviews
- Air and Water Pollution Reports

EMPLOYMENT SECURITY

- Illinois Unemployment Insurance Law Handbook
- IDES Board of Review Digest and Decisions (microfiche)

GENERAL ASSEMBLY

- Journal of the House of Representatives
- Iournal of the Senate
- Laws of the State of Illinois
- Special publications (e.g. Impeachment Proceedings for Rod Blagojevich)

GOVERNMENT FORECASTING AND ACCOUNTABILITY, COMMISSION ON GENERAL ASSEMBLY.

• Budget Summary of the State of Illinois

GOVERNOR

- Executive Orders
- FY... Capital Budget
- Illinois State Budget

HIGHER EDUCATION, BOARD OF

• Data Book on Illinois Higher Education

HISTORIC PRESERVATION AGENCY, PRESERVATION SERVICES DIVISION

- Illinois History Teacher
- Historic Illinois (periodical)
- Journal of Illinois History (periodical)

JUVENILE JUSTICE

• Quarterly Reports

LEGISLATIVE REFERENCE BUREAU, GENERAL ASSEMBLY

Legislative Synopsis and Digest

LEGISLATIVE RESEARCH UNIT, GENERAL ASSEMBLY

- Federal funds to state agencies FY...
- Constituent Services Guide
- Directory of Illinois State Officials
- Detailed Organization Report: Boards and Commissions with Legislative Appointments
- Illinois Tax Handbook for Legislators
- Laws for Older Adults
- Laws for Youth
- Legislator's Guide to Local Governments in Illinois: Special Districts
- Illinois Constitution Annotated for Legislators
- Preface to Lawmaking: Legislators' Introduction to the General Assembly

STATE LIBRARY, OFFICE OF THE SECRETARY OF STATE

 Illinois State Library's complete holdings of Illinois County land ownership maps and atlases • Publications of the State of Illinois

NATURAL RESOURCES, DEPARTMENT OF

- State Park brochures and field trip guidebooks (field guides to butterflies, wildflowers, etc.)
- Land and Water Report
- Regional River Inventories
- Outdoor Illinois (periodical)

POLICE, DEPARTMENT OF

Crime in Illinois

PUBLIC HEALTH

- Circulars such as epidemiological reports
- Vital Statistics Illinois...

RETIREMENT SYSTEM, STATE EMPLOYEE

• Comprehensive Annual Financial Report for the Fiscal Year Ended...

REVENUE

• Illinois Sales Tax Rate Reference Manual

SECRETARY OF STATE, OFFICE OF

- DUI Fact Book
- Illinois Register
- A Guide to Services: Serving Senior Citizens, Persons with Disabilities, and Veterans
- Illinois Blue Book
- Illinois Handbook of Government
- Illinois Vehicle Code

SECRETARY OF STATE, OFFICE OF, BUSINESS SERVICES DEPARTMENT

- A Guide for Organizing Domestic Corporations
- NFP: A Guide for Organizing Not-for-profit Corporations

SECRETARY OF STATE, OFFICE OF, DRIVER SERVICES DEPARTMENT

- (CDL) Illinois Commercial Driver's License Study Guide
- Illinois Motorcycle Operator Manual
- Illinois Rules of the Road. English
- Illinois Rules of the Road: Non-CDL Vehicles
- Illinois Rules of the Road: Illinois Commercial Driver's License Study Guide
- Rules of the Road: Review Course Workbook

SECRETARY OF STATE, POLICE DEPARTMENT

• Offense Code Book

TRANSPORTATION

Proposed improvements for Illinois highways