

In This Issue: The inside story about metadata
Updates on Records, ELNs, Archiving and Organizing.

eOrganizedWorld
the Online Information Management Newsletter
for Information Professionals
from Charlie Sodano

The inside story about metadata

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There are a lot of people who only have a vague idea about what metadata is, much less why is useful. ISO 15489 defines metadata as: "Data describing context, content and structure of documents and records and their management through time." The concept is actually quite simple. Let's think about paper filing systems. Most organizations file their information into folders and subfolders that are labeled in a logical manner. Some popular filing systems are chronological, alphabetical, project number, etc. Each of these folder names is metadata that help you find and retrieve records from your repositories. There are paper filing systems that use several colored tabs on each folder to help in the retrieval process. For example, a red tab in a chronological system could mean that this folder contains legal information. I've seen archives where each folder had more than 6 colored tabs. These systems claim to reduce retrieval time by 40%.

Metadata is also used for locating electronic records within a collection. However, it is not uncommon to have 30 or more electronic metadata tabs for each record. I won't dwell on how much easier it is to search electronic metadata versus paper tabs. This is a no brainer.

If you have records that you plan to keep for more than 7 years, you need to think about what kind of information will be needed to find your records in the future. Things like department name, project codes, location, acronyms and jargon may be changed and/or forgotten. Items like date completed, project name, authors and a good set of keywords are essential. Other metadata entries can of course be used to manage current records, so department name may be useful for a few years or more, but probably not in the future. A master listing of archive metadata should be composed with representatives from all stakeholders. A lawyer will probably need some metadata that is not the same as what a scientist requires. Records for long term archiving can be stored in a variety of media. It is highly recommended to use a chronological filing plan. The reasoning is this. Assuming that you have captured key metadata for each record, perform a search and identify the items of interest, retrieval is easiest (especially for paper and microfilm) via navigating by date.

Almost all contemporary software authoring tools (Microsoft Office and Adobe for example) have the capability to add metadata fields. These fields can be uploaded into a database system (document manager) or the database system can be used to define the appropriate metadata. Microsoft Access can be used as your document manager if you don't have the resources to buy and support a better system.

One other thing to consider if you are planning to keep records for a lot longer than 7 years. Most likely the software that the records and metadata were authored with will not exist. The metadata and the original record need to be exported into a format that has a high likelihood of working in the future.

Google and other content search engines have changed the way we interact with documents and all types of textual content. Some have suggested that only content searching will be needed in the near future. While this vision of the future may come true, it is unlikely that content search alone will replace the need for metadata, that it will instead complement it.

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A link to the EZine is also found at www-eorganizedworld.com

Contact us (consultants@eorganizedworld.com) for additional information about getting your records management program started. We'll give you more free advice and explain how we can continue to work together.

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What's new?

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Records

Sarbanes-Oxley for Dummies, now in its second edition, accurately captures the technical side of the law, emphasizing that SOX is directed at ensuring the accuracy of information that appears on financial statements.

VersaPAC, an Electronic Records Management Systems vendor has chosen VirtualViewer as the viewer for Saffron. Saffron is VersaPAC's zero footprint web client for HP TRIM Users can easily manage virtually any type of electronic record in the viewer including Word, PDF, TIFF and Excel without downloading or launching the creator application. VirtualViewer's unique Page on Demand technology makes retrieving specific pages within multi-page documents quick and easy. All of the processing is performed on the server so only the requested page(s) is (are) sent to the viewer rather than waiting for the entire document to download or stream to the viewer.

ARX completed the CA smart certification for its CoSign digital signature solution. When the CoSign digital signature solution is used with CA Records Manager, and a CoSign user authorizes or approves, that user may do so with their secure digital signature (standard electronic signature), binding their identity and intention to the electronic record. Signed records can then be managed by CA Records Manager, the results of which can serve as a permanent reference point for the audit record.

Autonomy Corporation plc announced a Legal Hold solution that fully automates the multi-faceted process necessary to preserve Electronically Stored Information (ESI) across laptops, desktops and all enterprise data sources. It is the only legal hold solution to uniquely combine and automate custodian notification and management with ESI identification, preservation and collection - all on a single platform, significantly reducing the risks and costs associated with the legal hold process and the duty to preserve by extending an organization's control of its information to the edge of the network.

Archiving

Since 2002 the Portico electronic archiving service has been working with most major publishers to preserve scholarly literature published in electronic form and to ensure that these materials remain accessible to future scholars, researchers, and students. This information will be protected no matter what happens to the publishing business in the future.

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