Creating Metadata in the Polar Data Catalogue (PDC)

Log in (or register for first time users) using your email address.

[*Note for students: Log in (or register for first time users) using your supervisor's email address. The email address is the main link to a laboratory's records and thus remains the most reliable and constant login name for years to come.*]

1. New metadata records are created by using **"Submit Metadata"** in the User navigation menu or the **"Submit Metadata"** button on the Dashboard. The **Metadata Input Form** can be completed online. All mandatory fields of the online form need to be completed for your record to be saved. The **Metadata Input Form Template** (available in .txt format under **"Helpful Documents"** in the Help navigation menu) allows you to fill in the form offline and then to copy and paste into the online form later.

2. To save the metadata, click on the **"Validate and Save"** button at the bottom of the page. A screen indicating **"Record created and saved successfully"** will appear if no errors were present in the metadata. If there are errors, you will be returned to the form and error messages will explain what is missing. Once validated, the record status will be marked as **"Saved"** in the **"My Metadata"** page. At this stage the record is still only visible to you.

3. Once you are satisfied with your metadata record, is to **"Submit Metadata"**. on the **"Record Created Successfully"** page. An automatic email will be sent to your e-mail (or the email used to log in) This will make it visible to the PDC Data Specialist who will review your submission. You will be emailed if there are any edits required to improve the quality or to standardize the metadata record. The record will not be available online until it is approved by the Data Specialist.

4.   The Approver can approve, edit (for minor errors), or send back (for major changes) the record. You will not be able to update your metadata once you have submitted it - a metadata record with "submitted" status can be edited (updated) only by the Approver. An automatic notification email will be sent once the record is "Sent back" or "Approved." The record will be available to the public (i.e., on the online search) only after it has been approved.

5.   Changes to a record can be made once the metadata record is approved. To make changes to an approved metadata record (e.g., an update on record duration to include extra years, a key citation for the data, additional variables, etc.), select **"Update"** at the bottom of the desired record. **You must save and resubmit your record** for reapproval. While the record is waiting for reapproval, the latest version is not available online.

6.   Students can also enter metadata, but supervisors should verify student's metadata before it is submitted. This is important, because once online, these metadata will be internationally and

publicly visible. Students can use their own PDC log-in account, but it is preferable that they use their supervisor's account, if the supervisor is amenable to this arrangement. This simplifies transfer of metadata records from student to supervisor account following graduation, which is sometimes necessary.

[Note for students: Please make sure that your <u>supervisor is in the loop</u>, and ask him/her to verify the metadata before submitting it. He/she may identify problems, errors and important corrections, including legal, confidentiality, and liability issues that are not obvious to you.]

A FEW GENERAL SUGGESTIONS FOR METADATA:

- **<u>Title:</u>** Use a catchy and self-explanatory title. For example, a title such as "Hudson Bay data" will not be adequately descriptive for a user searching the Polar Data Catalogue. Similar to an online Google search, only the metadata titles will appear during the initial search.
- **<u>Abstract:</u>** Properly describe the variables (and units) sampled. The important variables should also be included in the Keywords section.
- **<u>Responsible Parties:</u>** Include the name of the Principal Investigator as well as the Originator ("first author") in the list of Responsible Parties. Additional names may be added for people who were involved as Collaborators or who are a Point of Contact. Please ensure that **ALL** Responsible Parties are listed in the Citation field.
- **<u>Link to Data:</u>** If there is an available online link to data, provide the URL for the link. If there is no online link, provide the email address of the Principal Investigator (professor or equivalent) holding the data. Do not provide a student email as these are likely to change in the short-term.
- **<u>Keywords:</u>** Include overarching keywords, especially when only sector-specific keywords have been used. For example, studies examining certain bird species may have the species names as keywords but should also have the keyword "bird."
- If Research Programs or Keywords for your record are not available, please request them.

If you have questions or concerns, please contact:

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