

Template: Metadata mapping

Metadata mapping is a way of associating one set of metadata elements or fields to the equivalent elements in systems or information assets. Advantages of metadata mapping include:

- Ensuring that all mandatory recordkeeping metadata is being captured by a system
- Assisting in migration of records from one system to another
- Ensuring interoperability between databases, e.g. a business system and an EDRMS
- Improving operational recordkeeping processes including creation, capture, classification, storage, preservation, access and security, disposal, searching and reporting
- Managing transfer of Permanent agency records to state archives or transfer from one agency to another as a result of administrative change.

This template can be used to map all of the recordkeeping metadata elements in *Guideline 5 - Recordkeeping Metadata* to the equivalent field and tables in each database or business system that holds permanent records.

This may also provide evidence that recordkeeping metadata is applied in accordance with *Guideline 1 - Records Management Principle 1 - Create and Capture*. This template can be customised to meet your requirements, e.g. it may be integrated with your Information Asset Register.

Mapping metadata is not always a clear one-to-one process. There may sometimes be one-to-many relationships, or the meaning of an element may not be exactly equivalent. This should be explained in the comments. The fields shown in this template are the minimum fields to be mapped.

NOTE: If there is no equivalent metadata element in the agency system or information asset, this must be documented. Examples have been provided in [< Blue >](#):

Date:	
Person responsible for undertaking mapping:	
Information Asset Name:	
Asset Description:	
Status (e.g. in use/inactive/legacy data):	
Information Asset Owner/Steward:	

Recordkeeping Metadata Element		Equivalent table/data field in agency system	Level applied	Comments
1	Record identifier (ID)	< Record Number > < Unique Identifier >	< Record level >	< Record Number is automatically generated by system, based on a structure of: DOC/YY/NNNNN. However, the Unique ID is system generated and is sequential number >
2	Title/name	< Document Title >	< Record level >	< Three level naming structure. Top two levels are generated based on the title of the folder using the agency's BCS. The third level of the title is a free text field of 254 characters maximum >
3	Date of creation	< Date Written (Date Created) >	< Record level >	< This is automatically generated by system unless the record was originally hardcopy and then digitised, in which case the date created is manually applied by the Registration Officer >
4	Author/creator	< Author / Signatory > < Provenance >	< Record level >	< This is automatically assigned by system, based on user login if created in Office software and saved into EDRMS. If the record is saved into the system from an outside source, metadata may need to be manually applied. >

Checklist: Metadata mapping

Recordkeeping Metadata Element		Equivalent table/data field in agency system	Level applied	Comments
5	Business purpose/process/activity	< Business Classification Scheme >	< Folder (Container) level >	< Two level Function/Activity classification scheme, implemented in the system in 2014 based in unique and common administrative functions >
7	Creating software application	< Item Type > < Information Asset Description >	< Record level > < Information Asset level >	< e.g. Microsoft Word Document. The software name and version number is listed in the agency's Information Asset Register >
8	File format	< Extension >	< Record level >	< e.g. DOCX >
9	Action that was taken, such as: <ul style="list-style-type: none"> • Registration into the recordkeeping system • Apply or change access rules • Modify or edit • Transfer of control/custody • Migration 	< Edit Status > < Access Control > < Document Details > < Document History > < All Actions >	< Record level > < Folder (Container) level >	< The system has a number of metadata fields that document actions to the record and to the folder. A full list of all process metadata fields that are populated is attached to the Information Asset Register file - See I2 Disposal for disposal related process metadata>
10	Date of action	< Date Modified > < Date Closed > < Date Imported > < Date Inactive > < Date Due for Destruction >	< Record level > < Folder (Container) level >	< The system has a number of date fields that document process actions. A full list of all fields that are populated is attached to the Information Asset Register file - See I2 Disposal for disposal related process metadata>

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Recordkeeping Metadata Element		Equivalent table/data field in agency system	Level applied	Comments
11	Responsible officer/ID	< Access Control >	< Record level > < Information Asset level >	< The Access Control field logs all changes to the record and record metadata. If an officer undertakes any migration or disposal actions in the system, this is noted in the Information Asset Register. Details documented include the date of the action and the name and position of the officer responsible for the action.
12	Disposal	< Retention Schedule > < Date of Disposal >	< Folder (Container) level >	< This applies the retention and disposal schedule number, class number, disposal action >
13	Information security	< Security Marking >	< Record level >	< This is a custom field that is applied by the System Administrator. This is updated to a higher protective level if requested by folder owners, if the information registered to the folder is assessed as requiring higher protection levels. This process is documented in the agency's Information Security Procedures on FOLXX/NNNN>
14	Rights statement	< Copyright / Public Access / Notes >	< Information Asset level >	< This information is supplied by the Information Asset Owner at the point of registration of the Asset. This is reviewed annually. >

Recommended Reading

For Information Management Guidelines and Advice, visit our website.

- Guideline 1 – Records Management Principles
- Guideline 5 – Recordkeeping Metadata
- Advice 14 – The value of recordkeeping metadata
- Advice 18 – Managing records in business systems

Further Advice

For more detailed advice, please contact:

Government Information Strategy Unit
Tasmanian Archive and Heritage Office
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Acknowledgements

- State Records of South Australia, Information Sheet - Metadata Mapping (August 2013)¹

Information Security Classification

This document has been security classified using the Tasmanian Government Information Security classification standard as PUBLIC and will be managed according to the requirements of the Tasmanian Government Information Security Policy.

Document Development History

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1.0	01-06-2015	Samara McIlroy	Initial Release	All

Amendments in this Release

Section Title	Section Number	Amendment Summary

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Ross Latham
State Archivist

¹ https://government.archives.sa.gov.au/old-site/files/management_infosheet_metadatamapping.pdf