

# Anguilla - National Statistical System for Disaster-Related Statistics

## Metadata Catalogue

### Standard Operating Procedures and Manual (Draft)

**Prepared for:** The Government of Anguilla

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## Introduction

The **purpose** of the Anguilla Disaster Statistics Metadata Catalogue is to provide a location for all those involved in collecting and reporting on disaster data to pool knowledge of their information. These include Government departments, statutory bodies, trade associations and international bodies.

The **advantage** of having metadata pooled is that it provides a one stop shop for all agencies searching for appropriate information. However, that service is only effective if the catalogue is adopted, updated and distributed effectively.

This document provides a series of **standard operating procedures** (SOPs) that enable the Government of Anguilla in general and the National Statistics Office (NSO) in particular to operate a light touch system to ensure these advantages are realised.

This document details various SOPs to allow for:

- Identifying any reporting protocols and the need for data,
- Identifying roles within the system,
- The process for reviewing what data needs cataloguing with their metadata,
- Cataloguing the data,
- Quality control and review,
- Potential transfer of metadata between catalogues and systems,
- Update procedures.

This document also serves as the **manual** for the metadata catalogue. Training materials have been developed based on this document.

## PRELIMINARIES

Before detailing the SOP, the following context is provided to establish both the environment within which any metadata catalogue system exists and identify any roles.

### LINKS TO KEY PROGRAMMES

Currently the metadatabase is targeted towards the UNESCAP disaster-related Statistics Framework which supports reporting to the Sendai Framework for Disaster Risk Reduction. This framework has been tailored towards Anguilla's agreed reporting priorities.

Potentially, there are many other reporting mechanisms to which the metadata catalogue could be targeted. These could include:

- CARICOM disaster statistics,
- CDEMA's Damage Assessment and Needs Analysis (DANA) continuum,
- World Bank Post Disaster Needs Assessment (PDNA) requirements,
- Other National reporting as required.

Many of the datasets and statistics listed in the catalogue would be useful to these mechanisms.

### EXISTING INSTITUTIONAL CAPACITY

The SOPS described here work within the understanding of the current operation of data transfer, statistical and disaster related responsibilities and human, institutional and technical capital existent within the agencies of the Government of Anguilla and beyond. This understanding includes:

1. The National Statistics Department (NSD) is mandated to curate the official statistics for Anguilla,
2. Other agencies hold both repositories and metadata for other data collections,
  - a. Department of Physical Planning holds the national repository for Geographical Information Systems, including metadata,
  - b. Other departments hold thematic statistics and base data for a range of items which are not only of use in disaster statistics reporting but for a multitude of other purposes,
3. Much data has a temporal dimension and multiple time stamped versions of data or regularly updated datasets will exist.
4. While NSD holds and curates the metadata catalogue, it does not necessarily hold any dataset documented there and has no right to secondarily distribute the information unless agreements exist with the source agency.

### Evolution of needs

These SOPs take into account the current situation vis-a-vis the collation of disaster statistics for reporting, but recommends alternative procedures for Anguilla stakeholder to discuss and make recommendations where future institutional arrangements may be modified to ease data transfer. This may need some changes in both informal agreements between departments and formal declarations of policy and law; completion of that process is outside the scope of the current consultancy but recommendations are given.

The document tries to identify clearly where the implementation of an SOP is not already current practice and establish if the measure would be easy to adopt within current conditions or would require considerable thought and significant change in procedure and duties.

## KEY ROLES

Given many duties and the limited institutional capacity of the Government of Anguilla and its component ministries and departments, where possible the burden of metadata cataloguing has been absorbed within existing systems. There are a number of roles to be identified but these are recommended not as new posts within government, but duties allocated to existing staffing.

Role	Recommended Agency/ Person	Duties	Notes
Disaster Metadata Coordinator	National Statistics Department – Chief Statistician	<ul style="list-style-type: none"> <li>• Oversight of programme</li> <li>• Identification of data needs</li> <li>• Overall Quality assurance</li> <li>• Sharing Access of metadata</li> <li>• Annual Review</li> <li>• Sanction any update programme</li> <li>• Determines any training needs for data entry and usage</li> </ul>	Holds the definitive version of the Metadata Catalogue at this time.
Disaster Metadata Technical Staff	2 staff at NSO 1-2 staff at Physical Planning Department/ Lands and Surveys	<ul style="list-style-type: none"> <li>• Collection of metadata elements for entry from data providers</li> <li>• Collation of data and update of metadatabase</li> <li>• Maintenance of data access</li> <li>• Assists in sharing of database</li> </ul>	
Data Providers	A technical staff member who handles information management within their agency and has the authority from their heads of agency to liaise in this SOP	<ul style="list-style-type: none"> <li>• Identification of key data</li> <li>• Where possible formatting data in required structures/content</li> <li>• Provision of data</li> <li>• Documentation of metadata elements</li> <li>• Liaison with NSD</li> </ul>	
Data Users	All agencies involved in using data, including government, statutory bodies, private companies, regional and international institutions.	<ul style="list-style-type: none"> <li>• No specific duties but a role played to ask for sight of metadata and request datasets, and to provide input as to the need for any updates to the catalogue list.</li> <li>• Provide feedback on any errors of corrections in the catalogue.</li> </ul>	Some understanding of the scope, limitations and potential of the data will be necessary
Oversight Steerage	TBD – but recommend key departments (NSD, DPP, Disaster Management)	<ul style="list-style-type: none"> <li>• Ensure the operating procedures are followed</li> <li>• Maintain the network to ensure new or revised data are collated in the metadata catalogue</li> <li>• Revise SOPs as necessary</li> </ul>	Recommended to be a small group of key agencies only meeting 1-2 times a year possibly as an agenda item in an existing meeting structure

## DESCRIPTION OF DATA CATALOGUE

### FORMAT

The data catalogue is held in Microsoft Excel (2016 version was used to create) and is stored in an XSLM format which allows use of macros.

Several cells are locked by password which should reduce corruption of the file. The password is available from the Disaster Metadata Coordinator and Metadata Technical Staff.

### DESCRIPTION

The metadatabase is structured and colour coded to help use.

Tab	Content	Purpose	Users
Front page	Logos, acknowledgments	Affiliation	All
Main	Dublin Core standard metadata for all data	Data Entry and Search	All
Geographic	ISO 19115 specific metadata for data with Geographical reference	Data Entry and Search	All
Statistical	DDI and DCAT specific metadata for data with Statistical reference	Data Entry and Search	All
Metadata Log	Contains information about how metadata were gathered and for whom and indicators of metadata completeness	Maintenance	Metadata Managers
Catalogue Readme	Reference and documentation	Documentation	All
Contacts	List of all agencies involved in disaster statistics	Data Entry and Search	All
Look Up Lists	Options for look up lists within data entry sheets	Maintenance	Metadata Managers
Reports	Summary reports of metadata	Reporting	All
Sendai Mapping	Mapping of Sendai requirements against available datasets	Reporting	All
Stat Mapping Template	A template sheet that can be used to define the mapping of data/statistics to new reporting requirements	Reporting	Metadata Managers
New Record	Option for data entry	Data Entry	Metadata Managers
Data to be identified	Lists of datasets which have not been found but required for reporting	Maintenance	Metadata Managers

A separate tab for Statistical Variables (where individual variables could be documented more completely) has been removed.

FRONT PAGE	MAIN	GEOGRAPHIC	STATISTICAL	METADATA LOG	CONTACTS	LOOK UP LISTS
REPORTS	SENDAI MAPPING	STAT MAPPING TEMPLATE	NEW RECORD	DATA TO BE IDENTIFIED	DATA EXPORT	

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## DATA ENTRY

- Fields in the four yellow tabs allow metadata to be entered and used in searches.
  - MAIN, GEOGRAPHICAL, STATISTICAL, METADATA LOG,
- The information to be entered is based on the **Proposed Metadata Schema** document,
- Where feasible, the values to be entered in each column can be restricted by a drop down list or data formatting (e.g. a date or numerical value only).
  - The lists in the drop down menu are maintained mainly in the Look Up Lists (except for the contacts list) and additional values can be added during a data entry session and the values will be updated automatically in the relevant data entry column.
- There is initial space for 251 records. There is a [procedure for adding new rows](#) if there is the need for more datasets to ensure all validation formatting is maintained.

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## QUALITY CONTROL AND GOVERNANCE

Various procedures are available to monitor the quality of the information being held and to ensure the information are current including:

1. Checking when data are expected to be updated
2. Any changes of personnel or responsibilities
3. Any changes to the detail of the metadata held (e.g. if it comes online).

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## MAINTENANCE

The design of the metadatabase is robust but not foolproof. Certain limitations within Excel prohibit full protection. The SOPs details methods to protect the structure and content (e.g. through backup).

They also list other maintenance elements to document any changes to how data are described

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## DATA EXPORT

These tabs do not contain any protocols at present but there is an intention that data can be exported to other metadata formats if permitted.

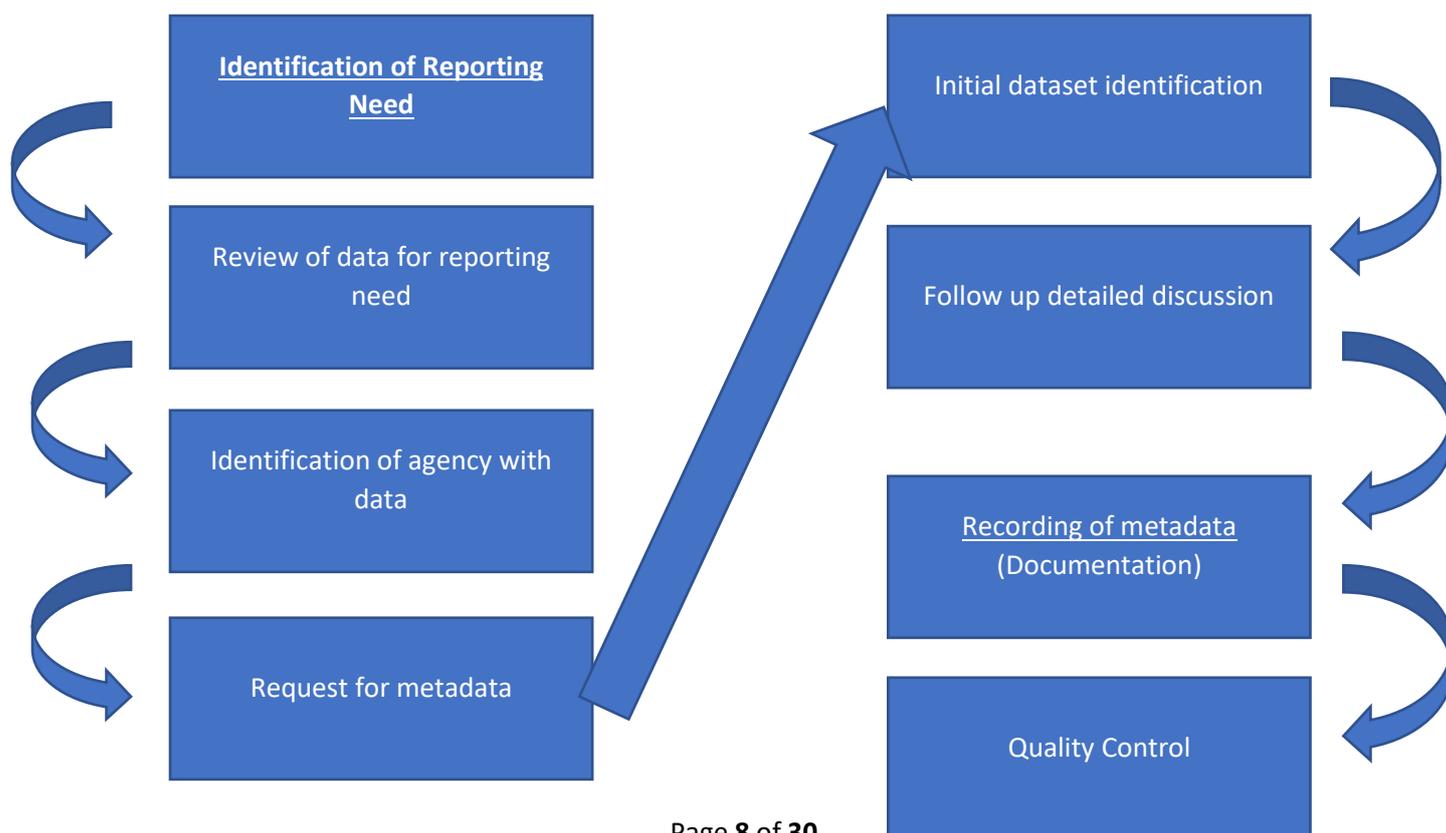
See the Metadata Schema document for information on how the specific elements in this database map to international schema requirements.

## DEFINITIONS OF TERMS USED IN THIS MANUAL

- **Cell** – the individual box where one piece of information is stored,
- **Row** – a horizontal collection of cells,
- **Column** – a vertical collection of cells,
- **Table** – a collection of cells in rows and columns within the spreadsheet which share features (e.g. a look up list) ,
- **Click** – use the left hand mouse button to click,
- **Right Click** – use the right hand mouse button to click,
- **Select** – choose one of the options in the list provided (e.g. menu),
- **Type** – use the keyboard to enter data,
- **Choose** – use the selection,
- **Scroll** – use the mouse to go up and down a list of items or position on the screen,
- **Click and drag** – Left hand click with the mouse but keep button depressed then drag the cursor across the screen to desired location (useful for copying multiple values across several cells),
- **Ribbon** – this is the strip across the top of the Excel window. It contains various **Tabs** and menu options are spread across the window for each tab,
- **WorkSheets** – these are the different columns and rows (e.g. MAIN, STATISTICAL, LOOK UP LISTS) which contain the information and are accessed by a series of tabs at the foot of the spreadsheet.

## Overview of Metadata capture process

The following is a schematic of the process for capturing metadata for Disaster Statistics. Each box is covered within the SOPs below.



## Standard Operating Procedures

### IDENTIFICATION OF REPORTING NEEDS

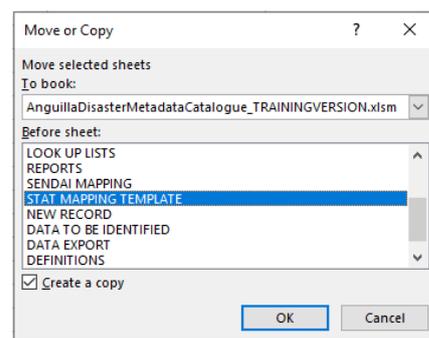
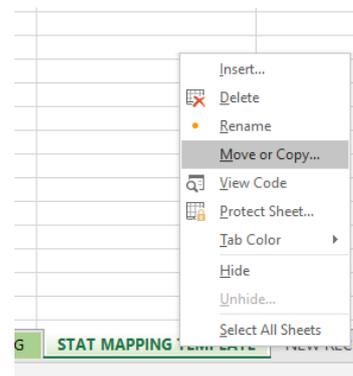
**To be completed by: Disaster Metadata Coordinator in discussion with the Steering group**

#### AIM:

To identify any additional datasets required for national, regional for international reporting when new requirements are highlighted.

#### PROCEDURE

1. Review the new protocol for reporting and make a list the datasets required to fulfil the requirements
2. Establish a new sheet in the metadata catalogue.
  - a. Right click on STAT MAPPING TEMPLATE tab and select Move or Copy
  - b. Tick on "Create a Copy" and copy "Before Sheet" STAT MAPPING TEMPLATE
3. Populate this new sheet with the requirements for this new reporting protocol – list all datasets required and any notes.
4. Review the existing metadatabase to establish:
  - a. Is the dataset already captured in the metadata catalogue – match the dataset in the new metadata sheet for this protocol.
  - b. Does the dataset identified as appropriate have all the requirements to be suitable for use in this report – report the level of match (Match, Fair Match, Fuzzy, Needs Adaptation) in the new metadata sheet.
5. If the dataset is neither in the metadata catalogue nor a sufficient match for the use the **metadata capture procedure** below to obtain the dataset/metadata.



#### OUTPUTS

A new REPORTING (GREEN) sheet in the metadata catalogue which identifies the data needed for the new reporting protocol,

Depending on the outcome of the search the output will be:

1. The dataset is already in metadata catalogue and of sufficient quality that needs no change
2. The dataset is identified as a fuzzy match and organisations need to be approached to see if data are available.
3. No data was identified as satisfying the requirements and a reach out to data providers is needed to establish a valid source.

#### NOTES

1. This can be potentially created for many different reporting mechanisms including:
  - a. Sendai (already created)
  - b. CARICOM
  - c. PDNA

## METADATA CAPTURE – INITIAL DATA CAPTURE

**To be completed by: Disaster Metadata Technical Staff in consultation with the data provider**

### AIM:

To identify any additional datasets required for national, regional for international reporting when new requirements are highlighted.

### PROCEDURE

1. From the identification of reporting needs, a dataset has been identified at needed.
2. Reach out to all data providers to establish if any department collects the dataset.
3. Identification of what type of data is needed - Once a dataset has been identified, reach out with a metadata **DATA ENTRY** form to the data provider.
  - a. It can be self-filled in by the agency but is recommended that a metadata technical officer supports the form filling. If possible, the XLSM form should be used.
  - b. Identify if the dataset has any **geographical** aspects that need entry – e.g.
    - i. Identify if the geographical dataset is a VECTOR or RASTER dataset
    - ii. Can you identify the map projection and coordinates system?
  - c. Identify if the dataset has any particular **statistical** elements which may need more cataloguing. The elements that will need you to add metadata about statistical datasets are:
    - i. There is some definition of a Total **Population** or **universe** for the dataset
    - ii. There are specific **sampling procedures** implemented
    - iii. Data have been **weighted** or **normalised**
    - iv. **Sampling error statistics** exist
    - v. There is need to document statistical **definitions** used.
    - vi. A series of variables have been used in creating the final statistics
4. Data capture - Go to the **data entry** sheet on the meta database
  - a. NOTE - **ADVISED THAT THIS SHEET CAN BE SEPARATE FROM THE DATABASE AND CAN ALSO BE USED MULTIPLE TIMES- SAVE A NEW COPY FROM THE TEMPLATE FOR EACH DATASET BEING CATALOGUED.**
  - b. Capture as much detail from the user as possible for the metadata catalogue. Where possible let the data provider open the dataset and investigate/verify elements such as file size, content, format from the use of Windows Explorer or other tools.
  - c. Try to work through all the schema. Always enter data according to the above guiding standard for MAIN, but only enter data for GEOGRAPHICAL and STATISTICAL tabs if the dataset contains those elements.
  - d. Use the short cuts where possible to enter data:
    - i. Some fields will only allow *numerical* or *date* formats.
    - ii. Date Format is *in dd/mm/yyyy* but should correct to the format used on your computer (e.g. *mm/dd/yyyy*). Today's date can be quickly added by using CTRL + ;.
    - iii. Many fields have a restricted set of options, drop down the arrow to the right and scroll down. Unfortunately, the auto complete does not work in Excel unless the value has been previously used.
  - e. To complete – make sure you enter the fields in the Metadata log which keeps track of when the metadata were collected and by whom.

5. Transfer to the database:
  - a. For each section (MAIN, GEOGRAPHIC, STATISTICAL, METADATA LOG) copy only the contents of the record (in light blue).
  - b. Move to the same section tab (MAIN, GEOGRAPHIC, STATISTICAL, METADATA LOG) and find the next available empty cell on the left hand side (COLUMN B for main, COLUMN C for the others). Make sure you align the data you paste with the correct record in each row (not all data will have geographic or statistical data).
  - c. Right click and choose Paste Special.
  - d. Choose Transpose - this will paste all the record in the same row.
  - e. Repeat for all tabs.
  - f. It is important in the METADATA LOG to agree a **review date**, for example 1 year away, 5 years ahead or more frequent.
  - g. Check that there are no validation errors in the dataset. If there are go back to the NEW record and tab. All validations should have occurred here but there is a potential for them not to be carried across, so checking is useful.
6. Run a check on some of the reports to see the new data coming through.
7. If you have used the NEW RECORD tab, ensure the data are deleted from this tab before you close the catalogue, so it is clear for the next time it is used. It is better to save a copy of the individual NEW RECORD Worksheet and give a unique name to the file.

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## OUTPUTS

A new record covering each of the tabs.

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## NOTES

Note – not all fields have to be entered in the metadatabase. However, it is recommended that the following guiding standard is followed:

1. **MANDATORY** – where possible enter these fields as they are required by international standards and are the most important data to hold.
2. **CONDITIONAL** – some fields are conditional on the data. If you click on the column heading it will give you the expected condition as a tool tip.
3. **ADVISORY** - this is not an international recommendation but advised by this consultancy to complete if possible.
4. **OPTIONAL** – these are optional fields – good to enter if you have the information but not essential.
5. AUTOMATIC FIELDS are shaded in **GREY**, do not alter these and normally these will be protected from editing.

If you prefer you can use the main data entry sheets to enter the data – this gives the advantage that new short cut methods will come available:

1. Values already entered can be quickly added by typing the **first few letters**.
2. To type the same value as the record above in the same column hold down **CTRL and type “ ”**.
3. You can **copy and paste** values from other cells (but make sure the metadata is exactly the same).

The data entry sheet allows users to enter data about one dataset in a more user-friendly manner. It is essential that you do not change the order of these fields or the data will not paste into the right column in the catalogue.

## QUALITY CONTROL OF METADATA

**To be completed by: Disaster Metadata Coordinator or someone designated by them.**

### AIM:

To check the records in the metadatabase to ensure consistency.

### PROCEDURE

1. Obtain a list of any datasets updated since last QC check
  - a. Go to the Metadata Log tab and check the Date of Original Report and Last Revision Dates to check if the record has been checked before the last date of a quality control check
  - b. Make a list of all Unique Identifiers for reference.
2. For each record in this list run through the row and look out for:
  - a. Check **mandatory and conditional fields** contain data where necessary,
  - b. **Spelling mistakes.** Highlight the row you want to check, use the  button in REVIEW tab on ribbon. Once the row completes you will see a message saying "Good to Go" ,
  - c. **Mistakes in punctuation,**
  - d. Where drop down look up lists have been used, ensure that the **correct selection** has been made,
  - e. Check the **value** in the field conforms to what is expected from the metadata schema,
  - f. That there are **no validation errors**. This will appear as a Warning triangle next to the cell. Usually these will be captured at data entry (a warning or error message will appear) but for some fields the validation is not as strict.

### OUTPUTS

A cleaner and validated set of records that can be confidently published and used by all.

### NOTES

1. Note that unfortunately the spellchecker will not work when the sheets are protected. Use [this procedure](#) to unlock the sheet, but remember to relock afterwards.

## ADDITION/ CHANGE OF ROLE/OWNERSHIP

**To be completed by: Disaster Metadata Technical Staff in consultation with the data provider, and on the instruction of the Disaster Metadata Coordinator and Steering group**

### AIM:

If a new organisation is identified which has data, this is how you can add the information.

### PROCEDURE

The steering group and Disaster Metadata Coordinator may identify a new data source which comes from an organisation or agency which is not already logged in the contacts list.

1. Steering group /metadata coordinator identifies that some data is useful that may come from a new provider.
2. Data Provider agency invited to be documented and to appoint a single contact name as the point contact for disaster related data (this can be at a technical or supervisory level on the decision of the supplier agency).
3. Obtain the contact details (check any privacy issues) as follows:
  - a. **Organisation** (full name of the organisation),
  - b. **Contact Name** (first name and family name in that order),
  - c. **Type of contact** information gathered (open text but can be elements such as office, webportal, home),
  - d. **Position in organisation** – official role/post,
  - e. **Link to logo image** - if online,
  - f. **Physical address** (PO Box if not available),
  - g. **Settlement Name,**
  - h. **Administrative Area** (compulsory but can use “-“ for Anguillan contacts),
  - i. **Post Code or Zip Code** (AI2640 for Anguilla addresses),
  - j. **Email address** (personal email preferred over generic office (i.e. not. [info@xxx.ai](mailto:info@xxx.ai))),
  - k. **Postal Address** – only use if different from Physical Address,
  - l. **URL – website of office – use main organisation website rather than government website,**
  - m. **Opening Hours** – optional.
4. Add a new record at the bottom of the list.
5. Enter the details you have and check for any mistakes.
6. Check the details with the agency before redistributing copies of the metadata catalogue.
7. Go to a field related to agencies in the metadatabase (e.g. Creator) – drop down the pick list and check the new organisation is entered here if needed.

### OUTPUTS

New contact details can be entered.

### NOTES

1. To be able to add a new row to this table, you will need to unlock the workbook – see [here](#).
2. Context:
  - a. There are three scenarios where this might occur
    - i. When a new dataset/statistic is coming from an agency not already identified,

- ii. When an agency alerts the metadata coordinator that the contact will change,
- iii. When the metadata coordinator does an annual review.

**3. Change of personnel**

- a. If there is a straightforward change of personnel within an organisation, there is only the need to change the name and any personal contact details (role, phone number, email). Other details about the organisation will remain. And the datasets assigned to that organisation will still link the to the same set of data.

## ANNUAL REVIEW – NEW STATISTIC REQUIREMENT

**To be completed by: Disaster Metadata Technical Staff under the direction of Disaster Metadata Coordinator with reach out to data providers if necessary**

### AIM:

To ensure that the data in the metadata catalogue remain relevant.

### PROCEDURE

1. Check the criteria for reporting are correct.
  - a. Has there been an update to the data required for all the reporting? If yes:
    - i. Document for each reporting mechanism that has been identified:
      1. The new or reformed statistics that need reporting
      2. The dataset(s) which are needed to fulfil the statistical requirement
      3. Identification of which agency will hold the new data/be responsible for the statistic's creation
    - ii. In the catalogue, go to the particular Reporting Tab (e.g. Sendai mapping) and find where the new statistic will be entered:
      1. Insert a new row in the appropriate topic/section (or add a new topic/section on the end),
      2. Select a whole row where another topic/section is identified (e.g. row 5 (2. Location section) and copy,
      3. Paste in your new cell – this will paste in the drop down and connecting look ups into this row,
      4. Update column B with the indicator/statistic to be measured,
      5. Update column C with the type of data (e.g. Number/% currency, time period etc),
      6. Ensure the dataset(s) related to this indicator or statistic is updated in the metadata catalogue,
      7. Return to the indicator and update the PRIMARY DATASET (and the SECONDARY DATASET) if appropriate with the data from the catalogue (it should appear in the Drop Down list). The **Who holds** and **Location** fields should be automatically updated.

### OUTPUTS

The Parameter is entered in the correct slot in the form and that the required dataset (s) has been mapped to the parameter.

### NOTES

1. To be able to add a new row to this table, you will need to unlock the workbook – see [here](#).

## ANNUAL REVIEW – CONTACTS

**To be completed by: Disaster Metadata Technical Staff under the direction of Disaster Metadata Coordinator with reach out to data providers if necessary**

### AIM:

To ensure that the data in the metadata catalogue remain relevant.

1. Check the contacts are up to date
2. Check their details are correct.

### PROCEDURE

1. Check the contacts are up to date
  - a. Have a call around/ assessment of who is in position in each of the key responsible agencies, particularly those who provide data.
  - b. See the detailed procedure for "[ADDITION/ CHANGE OF ROLE/OWNERSHIP](#)" if any changes are needed

### OUTPUTS

Contact list tab in the Metadata Catalogue updated.

### NOTES

NA

## ANNUAL REVIEW – DATASET REVIEW

**To be completed by: Disaster Metadata Technical Staff under the direction of Disaster Metadata Coordinator with reach out to data providers if necessary**

### AIM:

To ensure the data in the metadata catalogue remain relevant.

1. Datasets have been checked and updated.

### PROCEDURE

1. Ensure the metadata for the datasets are up to date:
  - a. Go to the Metadata Log,
  - b. Look at Next Review Data column. For each record which is highlighted in RED, this means the due date for review of the data has been passed,
  - c. For each record:
    - i. Contact the data provider and confirm if there is an updated version of these data. If so, check which details which may have changed. These may particularly include:
      1. Title,
      2. Source,
      3. Period of Validity,
      4. Date Created (if a totally new dataset is created),
      5. Date Accepted,
      6. Date modified (if the same dataset as before just contains updates),
      7. Transfer Size,
      8. Temporal Characteristics.

But a full check on the metadata is recommended in case the nature of the dataset has changed.

- ii. Update the fields which relate to the dataset, **or** in some cases when a historical record is needed, add a new record and complete the metadata in the normal fashion
- iii. In the metadata log – whether a new dataset or an old in a new date for when the dataset will be reviewed again.
  1. If a dataset has been superseded put “NA” in **Next Review Date**. The cell will turn green and can be ignored from hereon.

Check that each of the contact details are correct.

### OUTPUTS

1. Quality assurance that the metadata catalogue is current
2. Updated dates to inform the next annual review.

### NOTES

NA

## MODIFICATION OF THE METADATABASE SCHEMA

**This should only be done in discussion with the steering group and instruction from the Disaster Metadata coordinator**

### AIM:

If new elements need recording or metadata elements seen to be redundant, this procedure ensures that the changes are reflected through all the documentation.

### PROCEDURE

Once a change has been agreed:

#### 1. Metadata schema

- a. Identify if any addition is part of a recognised international metadata schema, and identify the parameters. The metadata schema document provides links to all the metadata schemas used.
- b. Add the record in the schema table as close as possible to related elements, identifying the following attributes for the new element. :

Major Theme	Groups the metadata elements into a small series of top level themes related to Description, Access, Content, Spatial Representation, and statistical study description.
Sub Theme	Each of these major themes may be further subdivided into sections.
Label	Simple label to be used for each element which is machine readable.
Item Name	A descriptive name for the element.
Schema Element Source	The standard schema from which the element is as exactly matched as possible (Dublin Core, DDI, DCAT or ISO 19115).
Obligation	The obligation on any cataloguer to document this element (Note this is open to change once it has been tested with real data): M – Mandatory – must be entered, O – Optional – this is an optional field, C – Conditional – if other fields are filled in this element must have data, H – Hierarchical, a useful metadata placeholder which relates to several more detailed elements but may also be a useful element in its own right for documentation.
Condition terms	If Obligation is C the terms of those conditions are specified here.
Description	A description of the element. Where possible these descriptions come from the official schema description

#### 2. Metadata catalogue

- a. Ensure the worksheet where you are going to make changes is unprotected – see [here](#).
- b. Find the same position within the list of column headings as the schema element above.
- c. Insert a new column – enter main theme, subtheme, label and Item name (which should be in the coloured boxes).
- d. Change the colour according to whether it is a mandatory (RED) , conditional (PINK) advisory (YELLOW) or optional (BLUE) or optional value expected.
- e. Establish any validations, and add tool tips if necessary.

- f. If the value requires a look up table, go to LOOK UP LISTS tab, make a table at the most appropriate location in this table which contains the values, make it a table and give it a sensible name (*MD\_XXX\_CODE*).
  - g. Back at the new column, click on the first cell to contain a value and select **Data Validation > Settings:**
    - i. Change **Allow** to *list*.
    - ii. Change **Source** to highlight the values which should appear in the drop down list (do not include the heading).
    - iii. Press **OK** to set up the validation.
  - h. Copy this cell, Select all the other cells in this column (down to row 250) , right click and select **Paste Special** and choose the **Validation** option.
3. **Update New Record (Data Entry Sheet):**
- a. In the **New Record** tab, Insert three cells in the exact corresponding position where the new item is documented (i.e. under MAIN, STATISTICAL, GEOGRAPHICAL or METADATA RECORD)
  - b. In the original data tab where the new column is situated, select the **Item name** and the next cell below (which contains any drop downs or other validations).  
**Select Copy**
  - c. Go to **New Record** tab , right click and select **Paste Special** in the new empty cells, and select the **Transpose** option.
  - d. Find the new description in the metadata schema for this new element and paste it under **Description of Element**.

## OUTPUTS

The new element is properly documented in :

- The metadata schema,
- The catalogue record,
- The data entry sheet.

## NOTES

Any new columns included in the schema will require all datasets to be reviewed for any additions to the database. This can be done on the next revision date.

## ADDING NEW ROWS FOR METADATA CATALOG ENTRIES

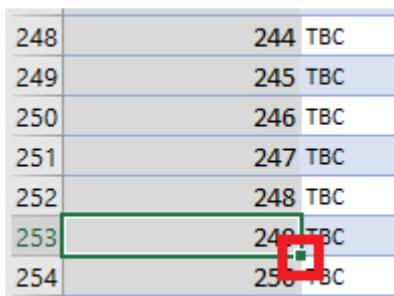
This should be completed by the Metadata Technical Staff

### AIM:

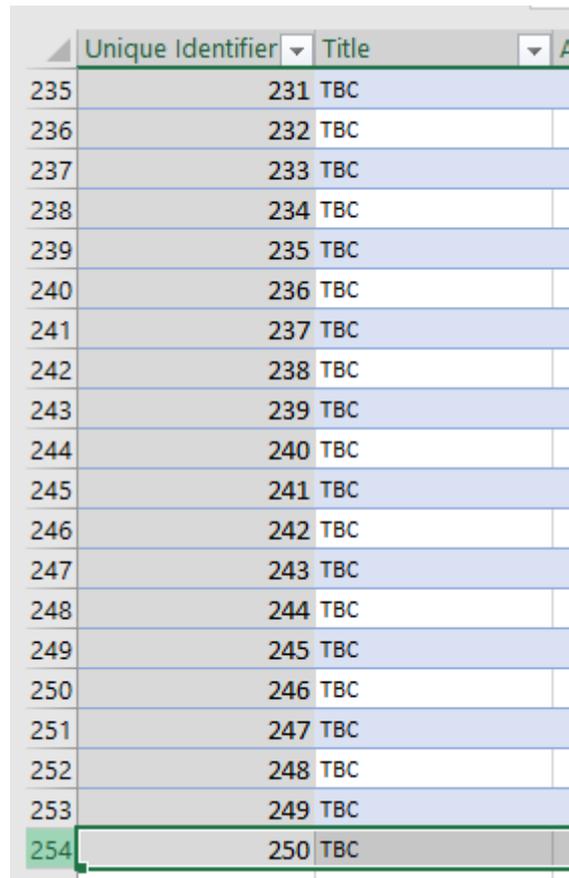
To allow rows for more datasets to be catalogued. This should be done before all the existing cells in the table have data entered for them.

### PROCEDURE

1. In the Main tab: Go to the last record in the table . Ensure no data have been entered in this last record.
2. Highlight the number on the left-hand column (see right) to select the whole row, right click and select **Insert**.
3. Repeat (or **CTRL-Y**) to add more rows

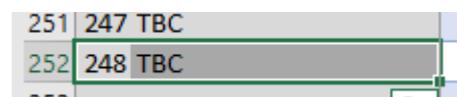


248	244	TBC
249	245	TBC
250	246	TBC
251	247	TBC
252	248	TBC
253	249	TBC
254	250	TBC



Unique Identifier	Title	A
235	231	TBC
236	232	TBC
237	233	TBC
238	234	TBC
239	235	TBC
240	236	TBC
241	237	TBC
242	238	TBC
243	239	TBC
244	240	TBC
245	241	TBC
246	242	TBC
247	243	TBC
248	244	TBC
249	245	TBC
250	246	TBC
251	247	TBC
252	248	TBC
253	249	TBC
254	250	TBC

5. Click and drag this box down to cover both the new cells and the last cell in the table column, the new cells and the last will be pasted with consecutive numbers.
6. Repeat steps 1-5 in Geographical, Statistical and Metadata Log Tabs, but select the first two cells (ID and Title) before dragging the cursor down so that values in both columns are pasted.



251	247	TBC
252	248	TBC

### OUTPUTS

New rows cross referenced between all the data tabs.

### NOTES

1. The reason that you cannot just add records to the bottom of the existing list is that the data are held in Excel Tables. If you add new rows below the table they are not included in the table which could compromise some reporting and searching functionality.
2. To be able to add a new row to this table, you will need to unlock the workbook – see [here](#).

## ADDING NEW CHOICES FOR LOOK UP LISTS

This should be completed by the Metadata Technical Staff on discussion with the Disaster Metadata Coordinator.

### AIM:

While some options in the look up lists are established in International Metadata Standards and should not be deleted, there is scope for some look up lists to have additional items.

### PROCEDURE

1. In the Data Entry Worksheet where want add new look up value choices, click on any cell in the column containing the look up list.
2. On the Ribbon go to the Data tab> Data Validation.
3. Under settings - check the table name or range of values in the Source Tab.
4. In the Look up Tab click on the relevant table (there is a convenient menu at the top of the page) or find the relevant cells as listed in the Data Validation Window.
5. Go to the last record in the table.
6. Select **Insert > Table Row Below**.

MD_SpatialRepresentationTypeCode
vector
grid
textTable
tin
stereoModel
video
Not Applicable



7. Enter the new value in the empty box.
8. Consider sorting the entire list alphabetically.
9. Make a note of the cell of the last entry in the look up table (e.g., G9).
10. Back in the original Data Entry Worksheet check if the additional value comes through.
11. If not, go back to Data tab> Data Validation
  - a. Check that the last value of the Source range includes the last entry in the look up table (e.g. G9).
  - b. Copy and paste special the validation through all the cells in that column.

### OUTPUTS

New item in look up list for this column.

### NOTES

1. The names of the tables relate where possible to identified names of elements within the relevant International Standard (e.g. ISO 19115) and should not be changed. Values already in the table should not be altered as they also reflect international standards.
2. To be able to add a new row to this table, you will need to unlock the workbook – see [here](#).

## USING THE CATALOGUE - SEARCHING FOR METADATA

**This is aimed at the general data user.**

### AIM:

Finding a particular piece of information within the catalogue (e.g. name of dataset).

### PROCEDURE

1. In the **Home** tab on the ribbon got to *Find and Select*.
2. Type the search term in the **Find Tab** in the **Find What** box.
3. Press **Find Next** or **Find All** (if you think the term may occur several times).

### OUTPUTS

- The active cell will jump to the next instance of the search term.

### NOTES

1. This is useful to find a particular **name of the dataset** so you can source its location and metadata
2. You can only search for data in unprotected areas of the catalogue.

## USING THE CATALOGUE - FILTERING DATA

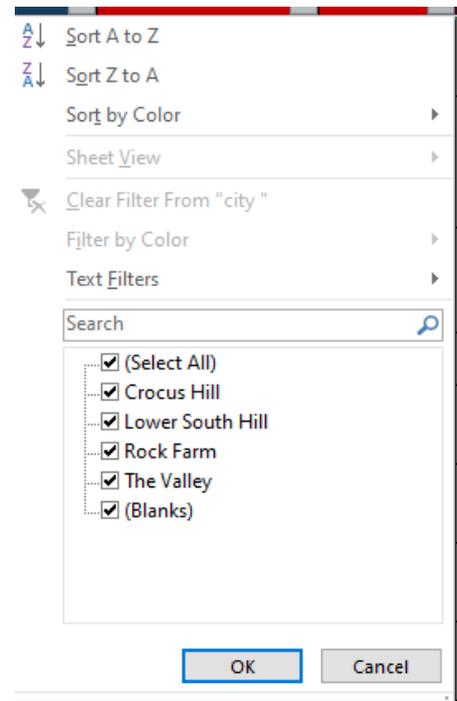
This is aimed at the general data user.

### AIM:

Within a particular column, finding all the values which match a particular search term.

### PROCEDURE

1. For the column you want to filter go to the names of the fields (these are the ones colour coded red/yellow/pink/blue).
2. There is a drop down arrow next to each cell – click here to show this box:
3. Tick off all the options that you do not want to search for.
4. Click **OK**.



### OUTPUTS

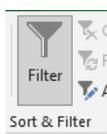
Only those records which contain the exact match for the search term will show.

This is useful for:

1. Identifying all the datasets connected with one agency (e.g. use ResponsibleAgency),
2. Identifying datasets which satisfy a particular Subject,
3. Showing all statistics or datasets which are Official Statistics,
4. See data of the same format,
5. Data that covers the same physical area,
6. Data of the same type of research instrument,
7. Data entered by the same people.

### NOTES

1. Ticking off **Select All** first is usually the easiest way to prepare for then selecting just one option, particularly if there are many values to choose from.
2. To reset the table so that all values show, repeat the steps above but ensure that **Select All** is ticked on.
4. To switch off the filter you have used go to Data tab in the ribbon and deselect Filter.



city	at
The Valley	-

## USING THE CATALOGUE – USING THE MAPPING TOOL

**This is aimed at the general data user.**

### AIM:

For being able to obtain an overview of what data are available to fulfil the requirements of a reporting format (at present only the Sendai/ UN ESCAP framework).

### PROCEDURE

1. In the **Home** tab on the ribbon got to *Find and Select*
2. Type the search term in the **Find Tab** in the **Find What** box
3. Press **Find Next** or **Find All** (if you think the term may occur several times).

### OUTPUTS

- The active cell will jump to the next instance of the search term.

### NOTES

1. This is useful to find a particular **name of the dataset** so you can source its location and metadata, and search within the data entry sheets for more metadata details.

## MAINTENANCE - TEMPLATE FOR NEW PROCEDURES

### Enter who will be responsible for carrying out this procedure

#### AIM:

Summarise in a sentence the purpose of this procedure.

#### PROCEDURE

1. Make a numbered lists of the steps that will allow the procedure to be carried out
  - a. Use multiple levels if a major step has several substeps.
2. Try to be concise.

#### OUTPUTS

Give a list of any outputs which are created within the metadata catalogue or elsewhere here.

#### NOTES

Give any other explanatory notes here. These could include:

1. Specific guidance on what to enter in the catalogue elements
2. Tips and tricks to help data entry
3. Other advice and alternative methods.

***Use the above as a template to copy , paste and then document any new procedures which have been identified. Delete this paragraph.***

**To be completed by: Developers and trained Disaster Metadata Technical Staff only**

### AIM:

The Excel spreadsheet contains many cells which are locked to stop mistakes and unformatting the database. This describes the procedure for locking and unlocking cells and protecting the catalogue.

The cells which are locked to most users will be:

1. Titles and column headings in the spreadsheet, including the front page,
2. Descriptive text,
3. Reference information to other cells (e.g., the ID numbers or names of datasets passed through to several sheets),
4. Automatic references (e.g., in the Sendai reporting),
5. Reports.

### PROCEDURE

#### 1. Unlocking cells

Cells are locked by default on the worksheets. To unlock them so that data entry can occur:

- a. Select the cells you will allow data entry,
- b. Right click and select **Format Cells**,
- c. Check off the **Locked** box.

#### 2. Protect a sheet

- a. Go to **Review** Tab on ribbon,
- b. Select **Protect Worksheet**,
- c. Type **Password** (only use approved password on any sheet),
- d. You will be asked to retype the password,
- e. Only those unlocked cells will be available for people to edit.

#### 3. Unprotect a sheet (for making changes to structure or editing values in field headings etc.

- a. Go to **Review** tab on ribbon
- b. Select **Unprotect Worksheet**
- c. Type **Password**
- d. All cells will be available for edit.

### OUTPUTS

Worksheets where structure, titles and other cells are protected while the areas for user data entry are able to be edited.

### NOTES

1. The catalogue uses **Protect Sheet** throughout as this allows the cells where data can be entered to be unprotected while the rest of the sheet remains protected

2. The same password is used throughout the catalogue to protect each sheet.
3. The password is not entered here in the manual for security reasons.
4. When some change has been made in the catalogue and the sheets need re-protecting, always use the same password.
5. The password is case sensitive.

## Appendices

### TOP TIPS

- If a value has already been entered in a column you should be able to type the first few letters and it will autocomplete.
- When entering new data for a record, the left hand columns may not be showing (due to frozen panes). If you go to Column A then use the tab key it will go to the left hand columns quickly.
- Frozen panes often disappear when reopening an Excel Spreadsheet. They can be easily reset:

1. Go to cell where you enter data

2. View>FreezePaness> Freeze Panes

### FILLING IN VALUES

Guidance on what to enter is generally given in the Schema document. In that document there are links to the International Standards websites which give more explanation and examples of how to enter data for each metadata element. Below are selected descriptors to guide data entry.

#### TOPIC

Guidance from US Geological Survey ( <https://apps.usgs.gov/thesaurus/thesaurus-full.php?thcode=15>)

General subjects for which geospatial data may be relevant. Few, broad terms.

biota	Flora or fauna in natural environment, for example wildlife, vegetation, biological sciences, ecology, wilderness, sea life, wetlands, habitat, biological resources
boundaries	Legal land descriptions, for example political and administrative boundaries, governmental units, marine boundaries, voting districts, school districts, international boundaries
climatology Meteorology Atmosphere	Processes and phenomena of the atmosphere, for example cloud cover, weather, climate, atmospheric conditions, climate change, precipitation
economy	Economic activities, conditions, and employment, for example production, labor, revenue, business, commerce, industry, tourism and ecotourism, forestry, fisheries, commercial or subsistence hunting, exploration and exploitation of resources such as minerals, oil and gas

elevation	Height above or below sea level, for example altitude, bathymetry, digital elevation models, slope, derived products, DEMs, TINs
environment	Environmental resources, protection and conservation, for example environmental pollution, waste storage and treatment, environmental impact assessment, monitoring environmental risk, nature reserves, landscape, water quality, air quality, environmental modeling
farming	Rearing of animals or cultivation of plants, for example agriculture, irrigation, aquaculture, plantations, herding, pests and diseases affecting crops and livestock
geoscientificInformation	Information pertaining to earth sciences, for example geophysical features and processes, geology, minerals, sciences dealing with the composition, structure and origin of the earth's rocks, risks of earthquakes, volcanic activity, landslides, gravity information, soils, permafrost, hydrogeology, groundwater, erosion
health	Health, health services, human ecology, and safety, for example disease and illness, factors affecting health, hygiene, substance abuse, mental and physical health, health services, health care providers, public health
imageryBaseMapsEarthCover	Base maps, for example land/earth cover, topographic maps, imagery, unclassified images, annotations, digital ortho imagery
inlandWaters	Inland water features, drainage systems and characteristics, for example rivers and glaciers, salt lakes, water utilization plans, dams, currents, floods and flood hazards, water quality, hydrographic charts, watersheds, wetlands, hydrography
intelligenceMilitary	Military bases, structures, activities, for example barracks, training grounds, military transportation, information collection
location	Positional information and services, for example addresses, geodetic networks, geodetic control points, postal zones and services, place names, geographic names
oceans	Features and characteristics of salt water bodies (excluding inland waters), for example tides, tidal waves, coastal information, reefs, maritime, outer continental shelf submerged lands, shoreline
planningCadastral	Information used for appropriate actions for future use of the land, for example land use maps, zoning maps, cadastral surveys, land ownership, parcels, easements, tax maps, federal land ownership status, public land conveyance records
society	Characteristics of society and culture, for example settlements, housing, anthropology, archaeology, education, traditional beliefs, manners and customs, demographic data, tourism, recreational areas and activities, parks, recreational trails, historical sites, cultural resources, social impact assessments, crime and justice, law enforcement, census information, immigration, ethnicity
structure	Man-made construction, for example buildings, museums, churches, factories, housing, monuments, shops, towers, building footprints, architectural and structural plans
transportation	Means and aids for conveying persons or goods, for example roads, airports/airstrips, shipping routes, tunnels nautical charts, vehicle or vessel location, aeronautical charts, railways
utilitiesCommunication	Energy, water and waste systems and communications infrastructure and services, for example hydroelectricity, geothermal, solar and nuclear sources of energy, water purification and distribution, sewage collection and disposal, electricity and gas distribution, data communication, telecommunication, radio, communication networks