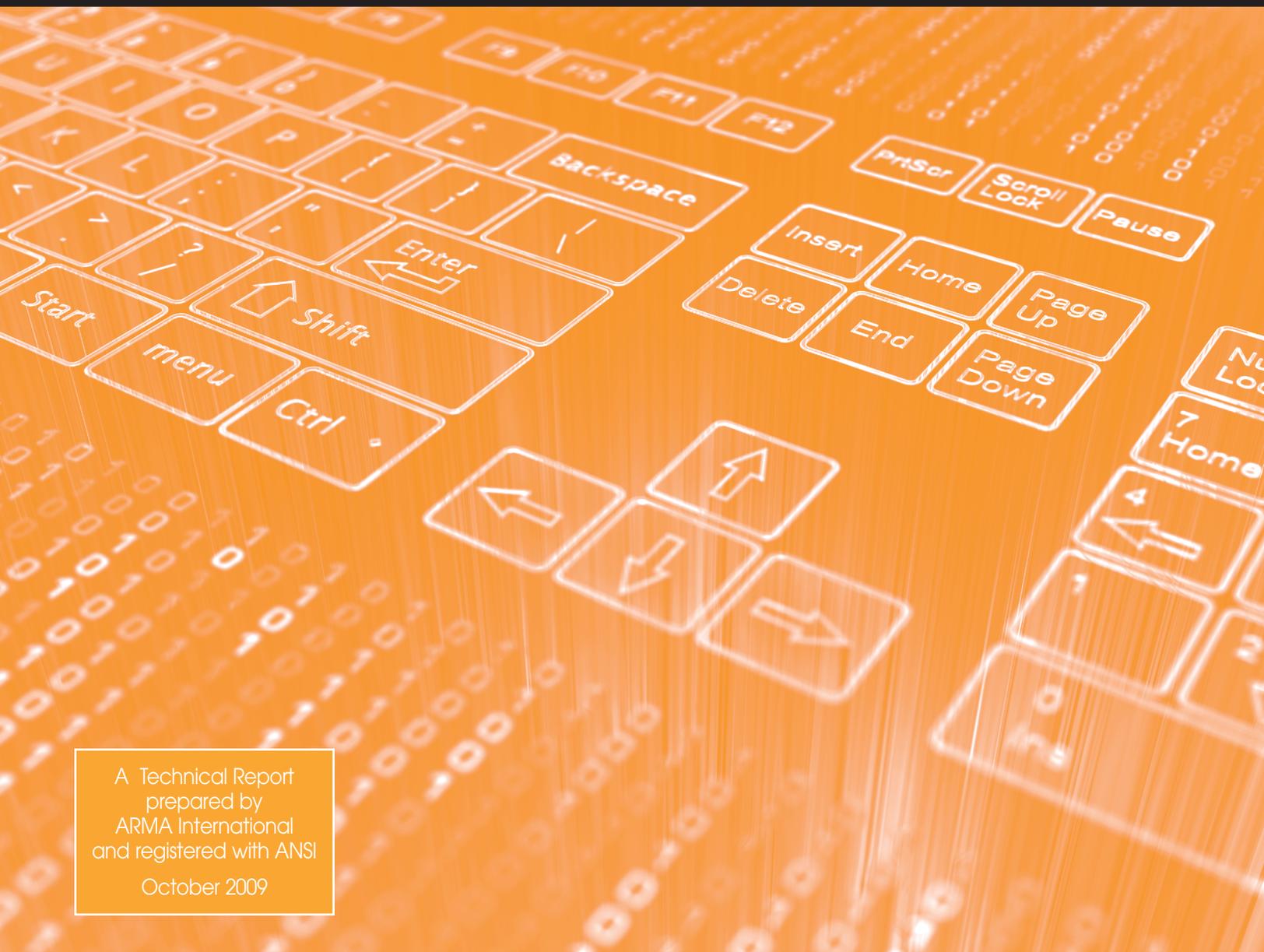


Metadata

A Basic Tutorial for Records Managers



A Technical Report
prepared by
ARMA International
and registered with ANSI
October 2009

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FOREWORD

Publication of this Technical Report that has been registered with the American National Standards Institute (ANSI) has been approved by ARMA International, 11880 College Boulevard, Overland Park, Kansas 66210. This document is registered as a Technical Report according to the Procedures for the Registration of Technical Reports with ANSI. This document is not an American National Standard and the material contained herein is not normative in nature.

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Rationale

This Technical Report provides a tutorial for the application of basic metadata elements necessary to support Records and Information Management (RIM) activities. This document focuses on current international standards and best practices guidance, namely ISO 15489, *Information and documentation – Records management*, and ISO 23081, *Information and documentation – Records management processes – Metadata for records*, and is organized according to the Metadata Conceptual Model set forth in ISO 23081. This Technical Report details how the information contained in these ISO publications—the international view—melds with the traditional records management lifecycle known to RIM professionals in North America—the North American view. This Technical Report does not include information about managing metadata elements as part of information technology system management.

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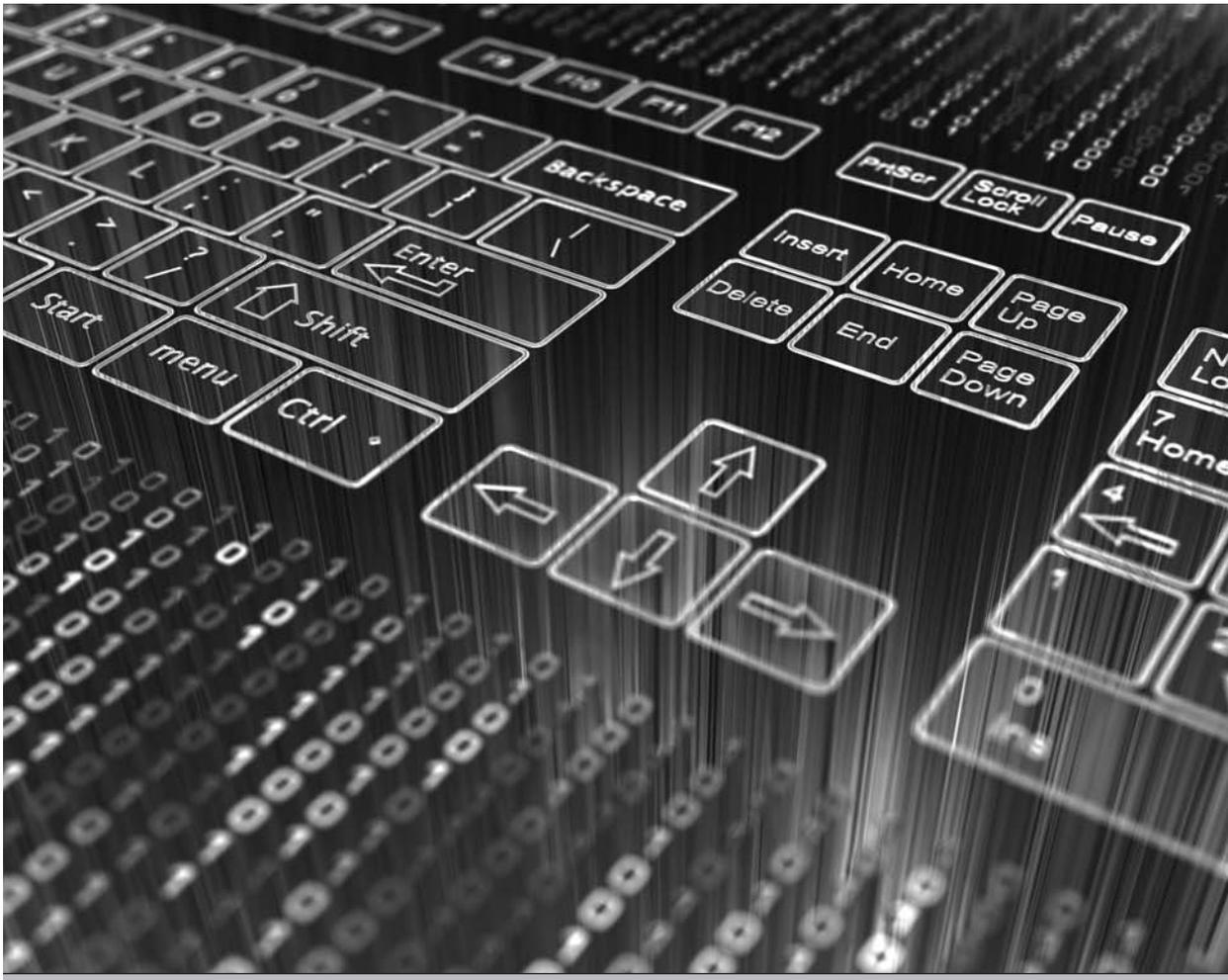
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► 1 Purpose

This technical report will encourage greater understanding and more widespread use of metadata elements. The records lifecycle is used as a tool to assist in this educational discussion of metadata. Although this publication is geared to a North American audience of Records and Information Management (RIM) professionals, it may be useful to readers in other geographic areas as well. Through the use of an elementary, field-based example, this technical report illustrates metadata elements and their implementation in a records management setting where a computer-based tool is in place to allow electronic data management. It provides useful information for practitioners regarding metadata's relationship to RIM policy and procedure.

► 2 Definitions

Definitions for RIM terms in this technical report can be found in the ARMA International *Glossary of Records and Information Management Terms*, 3rd edition.