Creating Metadata in the Polar Data Catalogue (PDC)

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A full User Manual is available on the PDC website, under the "Help" section. The manual, which is being updated but is slightly out of date at this time, provides detailed information on how to create metadata, but here are a few key points:

1. 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.*]

2. New metadata are created by using **"Submit Metadata"** in the left navigation menu on the **"My Metadata"** page. The **Metadata Input Form Template** (available in several formats under **"Helpful Documents"** in the left navigation menu) allows you to completely fill in the form offline and then to copy into the online form. All fields of the online form need to be completed for your record to be saved.

3. To save the metadata, click on the **"Validate Info"** button at the bottom of the page. A screen indicating **"Record created 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, but the record will not be available online until approval (see below). Changes to a record can be made by clicking **"Update."**

A FEW GENERAL SUGGESTIONS FOR METADATA:

- Title: 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.
- Abstract: Properly describe the variables (and units) sampled. The important variables should also be included in the Keywords section.
- Responsible Parties: Include the name of the Principal or Network 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.
- Link to Data: 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 or Network Investigator (professor or equivalent) holding the data. Do not provide a student email as these are likely to change in the short-term.

▪ Keywords: 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."

4. Once you are satisfied with the metadata, submit it to the project Approver by clicking **"Submit"** at the bottom of the metadata record page or choose **"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) and your research program's Approver (e.g. Josée for ArcticNet). This approval process is to further ensure good quality, standardization, and accuracy of metadata found in the PDC.

5. 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.

6. Once the metadata are approved, you once again have the ability to update the metadata. 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 and re-submit the changes to the Approver. While the record is waiting for re-approval, it is not available online.

7. 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 supervisor is in the loop, 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.]

If you have questions or concerns, please contact:

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