Scottish SDI Metadata Portal Documentation Documentation

Release 1

Astun Technology

Feb 19, 2024

USER DOCUMENTATION

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CHAPTER

ONE

ABOUT THIS GUIDE

This guide sets out detailed instructions on the creation, publishing and maintenance of standard compliant metadata published on the spatialdata.gov.scot metadata portal. It has been written using Read The Docs, and can be navigated through by scrolling or clicking the sections in the navigation bar. The subsections can be explored by clicking the plus sign next to each section. A PDF copy of this guidance can be exported by clicking on **'v: latest'** at the bottom of the navigation panel, which will display the options to download the document in PDF and other formats.

The portal is based on the open source GeoNetwork platform. Documentation on the GeoNetwork framework is also linked to within some pages of spatialdata.gov.scot. While this is more generic guidance, it may be of use if you can't find your answer within this document.

1.1 SpatialData.gov.scot

SpatialData.gov.scot (previously referred to in short as the SSDI) provides a catalogue service where users can find, share, and reuse spatial data published by Scottish public sector organisations. Information available is not confined to just environmental data, but includes a variety of themes such as health, transport and administration. Datasets are discoverable by text, map and programmatically based searches, can be previewed on a map interface, and can be accessed directly via web service links recorded in the metadata.

In addition to the catalogue service, the portal also provides editing and validation tools necessary for data publishers registered on the site to create and maintain the metadata they publish. The portal employs the UK GEMINI metadata specification to ensure metadata is recorded in a consistent manner, enhancing the access to and reusability of the data.

Good quality metadata is key to understanding whether data is fit for purpose, has value, and is reliable - particularly if it is to inform policy decisions. SpatialData.gov.scot fosters the development of good quality metadata, and underpins a range of websites and applications that aim to interrogate and analyse available spatial data.

Any queries about the portal can be directed to: SSDI.metadata@gov.scot

1.2 SpatialData.gov.scot and INSPIRE

In order to effectively use spatial data in the delivery of national outcomes, spatial data managed by public sector bodies should be collected and shared in a manner that is open, minimises duplication and encourages re-use. A common way to achieve this is through the development of a Spatial Data Infrastructure (SDI) - which is essentially a framework of connected standards, spatial datasets, metadata and tools for visualisation and analysis that allow for spatial data to be used efficiently. The main components of an SDI are:

- **Repositories** (to store the information)
- **Catalogue services** (to discover the information)
- **Web services** (to access the information)

- **Desktop GIS/Web Apps** (to interrogate the information)

The EU Inspire Directive aims to create a spatial data infrastructure for the European Union to enable the sharing of and access to environmental spatial information across Europe and assist in policy-making across boundaries. This EU SDI will be based on the infrastructures established and operated by the individual member states. The Directive came into force on 15 May 2007 with full implementation expected by 2021. This directive has since been transposed into Scottish law) in 2009.

Scotland, in partnership with other administrations of the UK, works to fulfill its INSPIRE obligations by developing its own spatial data infrastructure compliant to the standards specified by the Directive. The Scottish SDI aims to apply the principles of INSPIRE, not just to environmental data, but to all spatial data maintained by the Scottish public sector.

SpatialData.gov.scot fulfills the discovery/catalogue service component of the SDI and feeds into the UK public data publishing platform Find open data (data.gov.uk) (which in turn, feeds into the EU INSPIRE Geoportal). Harvest of the metadata on spatialdata.gov.scot to data.gov.uk is performed automatically on a daily basis, therefore record amendments should appear on data.gov.uk within 24 hours. Users should contact SSDI.metadata@gov.scot if they believe their records are not being harvested correctly.

Further information on INSPIRE, such as data specifications and implentation guidance, can be found on the INSPIRE knowledge base pages. Information relevant to Scotland is also circulated on Knowledge Hub, within the Scottish SDI Strategy Group, SDI/Inspire forum.

1.3 Metadata Standards on SpatialData.gov.scot

Metadata on the portal is compliant to the UK GEMINI specification, which defines a core set of metadata elements for UK geospatial data, and is compatible with the INSPIRE requirements for metadata. The current version of the standard is UK Gemini 2.3. Users should consult Annex 2 of this guidance to upgrade their existing metadata to Gemini 2.3 if the have not already done so.

The MEDIN Discovery Metadata Standard is a profile of UK Gemini specific to marine data. It can be thought of as a superset of Gemini, including the same core elements, but extending where necessary to include additional information relevant to the marine environment (e.g. marine keyword term lists). MEDIN format metadata uploaded to spatialdata.gov.scot will retain these additional elements. It is recommended that Scottish orgnaisations maintaining marine datasets with MEDIN format metadata submit to both spatialdata.gov.scot and the MEDIN portal.

CHAPTER

TWO

METADATA BASICS

2.1 What is metadata?

Metadata is essentially information about data. It describes, among other things, who collected it, why it was collected, the methods used to collect it and how it can be used. Metadata provides all the information a data user needs to assess whether the data resource is fit for use. Metadata allows users to:

- Know who created the data and for what purpose
- Know when the data was created
- Know the geographic extent or coverage of the data (for geospatial data)
- Understand how the data was created and manipulated
- Understand the limitations of the data with respect to use
- Understand any legal limitations to access and use of the data
- Determine tools needed to view, manipulate, and use the data
- Know how to access the data

Metadata is important to both the dataset provider and other potential users. High quality metadata allows dataset owners to keep an inventory of datasets they have created, with the ability to locate the data and recall the circumstances and context under which it was created and analysed. When publicly available, metadata enables other interested parties the ability to discover, understand and use the data to its fullest potential.

2.2 What are metadata standards?

A metadata standard is a specification which establishes a common understanding of the meaning (or semantics) of data, to ensure correct and proper use and interpretation by its owners and users. Many standards begin as schemas, which group metadata elements into sets designed for a specific purpose (e.g. for geospatial data) to enable the best possible description of a data resource in that context. For every element the name and semantics are specified, along with any rules on how content must be formulated and represented, and where element values are to be identified from controlled lists.

The development of such schemas tends to be controlled through community consensus combined with a formal processes for submission, approval and publishing of new elements. Schemas that are developed and maintained by standards organisations (e.g. ISO) or organisations that have taken on such responsibility (e.g. Dublin Core Metadata Initiative) are called metadata standards.

The UK Geospatial Metadata Interoperability Initiative (GEMINI) is the UK's geographic metadata standard. It was originally produced through a collaboration between the Association for Geographic Information (AGI), the e-

Government Unit (eGU) and the UK Data Archive. An application profile of ISO 19115, UK GEMINI is conformant with the INSPIRE Technical Guidance and designed to meet the requirements of INSPIRE in a UK context.

2.3 Why create metadata?

Metadata adds significant value to any organisation's data holdings, and failure to create it can lead to hidden costs generated at a later date. Undocumented data soon loses its value as staff change and institutional knowledge is lost. Subsequent staff with little understanding of the contents and use of the data and may lose confidence in results generated by it.

Beyond the individual organisation, data resources are a major national asset. Information of what data resources exist within different organisations, particularly within the public sector, is required to improve efficiencies and reduce data duplication. Metadata standards enable interoperability between organisations and platforms. Metadata from a variety of sources can be integrated into other technical systems or machine read by compatible ones. Adoption of metadata standards greatly increases the potential for data discoverability.

Data can only be useful if it can be interpreted and understood, and can only be used if it can be found. Creating and maintaining standard compliant metadata secures the financial investment that organisations put into data by:

- Retaining institutional knowledge
- Enabling better decision making through the use of appropriate data
- Avoiding costly duplication of effort through lack of knowledge about data
- Minimising the risk of unintentional use through good documentation
- Increasing the value of data by unlocking its potential for re-use
- Supporting collaboration through discoverability and simplified access
- Inspiring trust in the data source

When effort and resource is put into the provision of standard compliant metadata, organisations will be better placed to find, assess and make use of the data that is available to them – particularly in times of national emergency - saving time, money and lives.

2.4 Why use UK Gemini?

UK GEMINI is the designated standard for geographic metadata in the United Kingdom. It ensures consistency with respect to metadata across the UK through content guidance and the use of UK specific terms and code lists. UK Gemini also simplifies the INSPIRE Technical Guidance making it easier for organisations to achieve compliance.

While ensured compliance to regulations is important, the key benefit is the interoperability the standard allows across a range of platforms. Metadata in the Gemini format can be shared and consumed easily by a number of platforms and third party applications. Gemini is a requirement for the data.gov.uk portal and, with version 2.3, can now be consumed by the ESRI ArcGIS platform without the need of additional plugins.

CHAPTER

THREE

SEARCHING FOR METADATA

This section will guide users and guests to the site on how to search and filter metadata provided by data publishers to spatialdata.gov.scot.

3.1 Accessing the portal

The portal can be accessed from the following link:

https://www.spatialdata.gov.scot

The home page of the portal comprises a basic search bar at the top, and also provides the option to browse by topic category (default) or by INSPIRE theme. Visitors can also browse the newest entries to the site or the most popular using the tabs lower down the page. Tabs in the header menu give access to the main **search** page, **map** viewer and **sign in** page (for registered users). Clicking the portal name on the header menu will return the user to the home page.

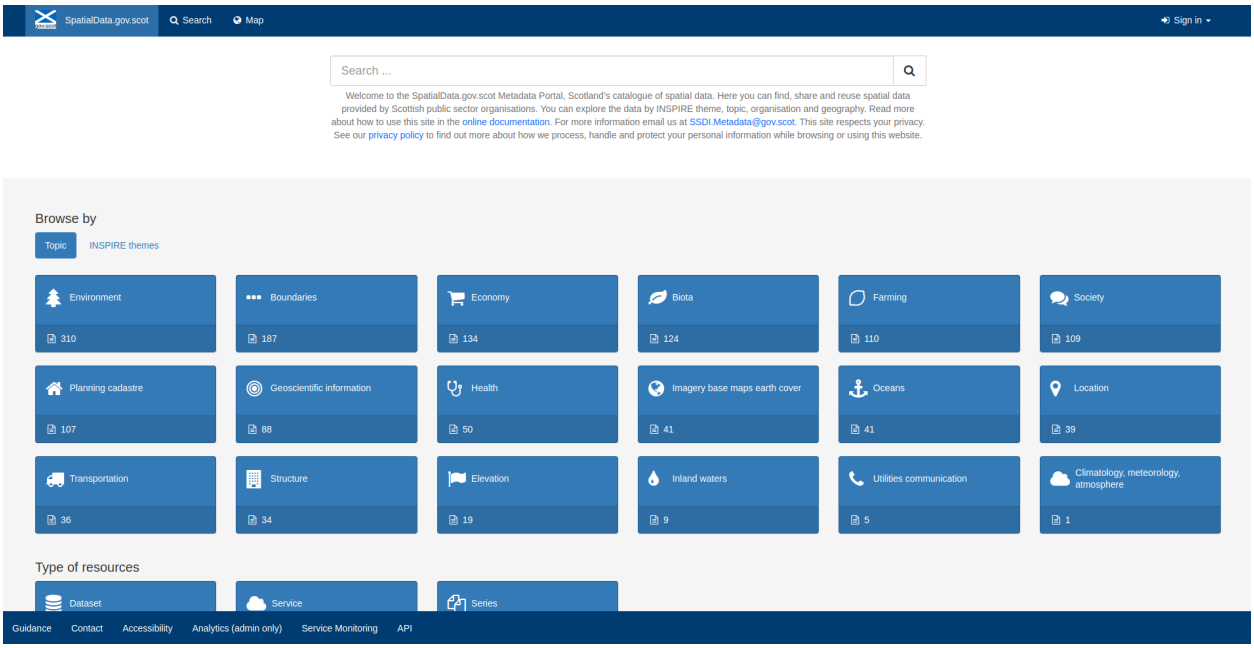


Figure 2.1.1: Home page

When logged in, registered users of the site will be presented with further buttons on the header menu for Contribute and Admin console (for user and site administrators). The Contribute menu

gives options to navigate to the **Editor board**, add a new record, import new records, manage directory, batch editing and access rights.

3.2 Basic searching

Quick searches on the portal can be performed directly from the home page using the search box and clicking the search button ( ).

Note: wildcard characters, such as the asterisk key, can also be used.

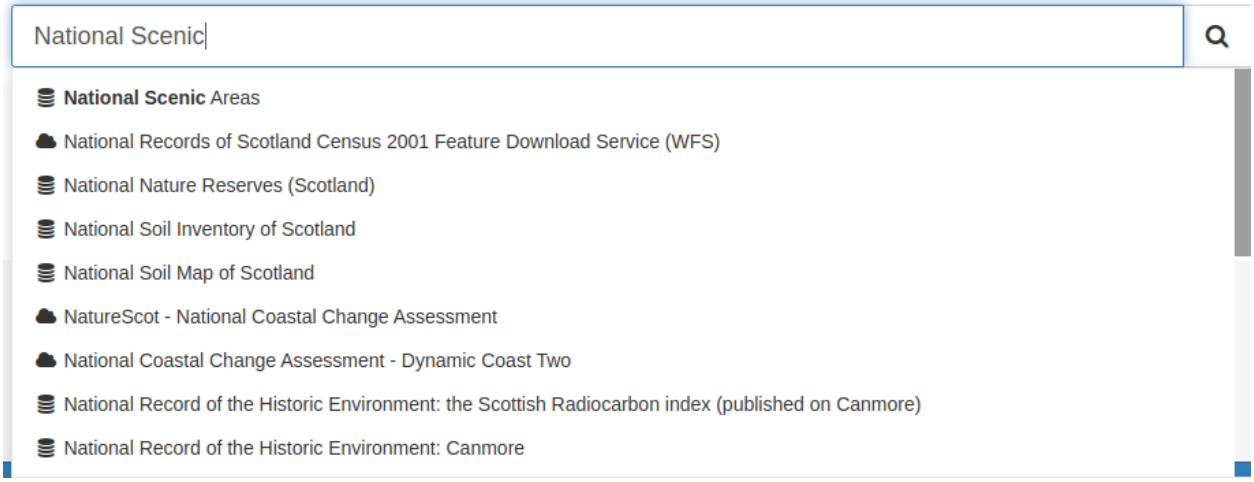


Figure 2.2.1: A basic search from the home page

This will take the user to the main search panel, showing the resulting records in the centre of the page, with additional filtering options to the left. The user can also access the main search panel by clicking Search on the top menu of the home page. To the bottom right of the page is a small map view showing the geographic extents of the queried results. This can be minimised by clicking the collapse button on the right of the map.

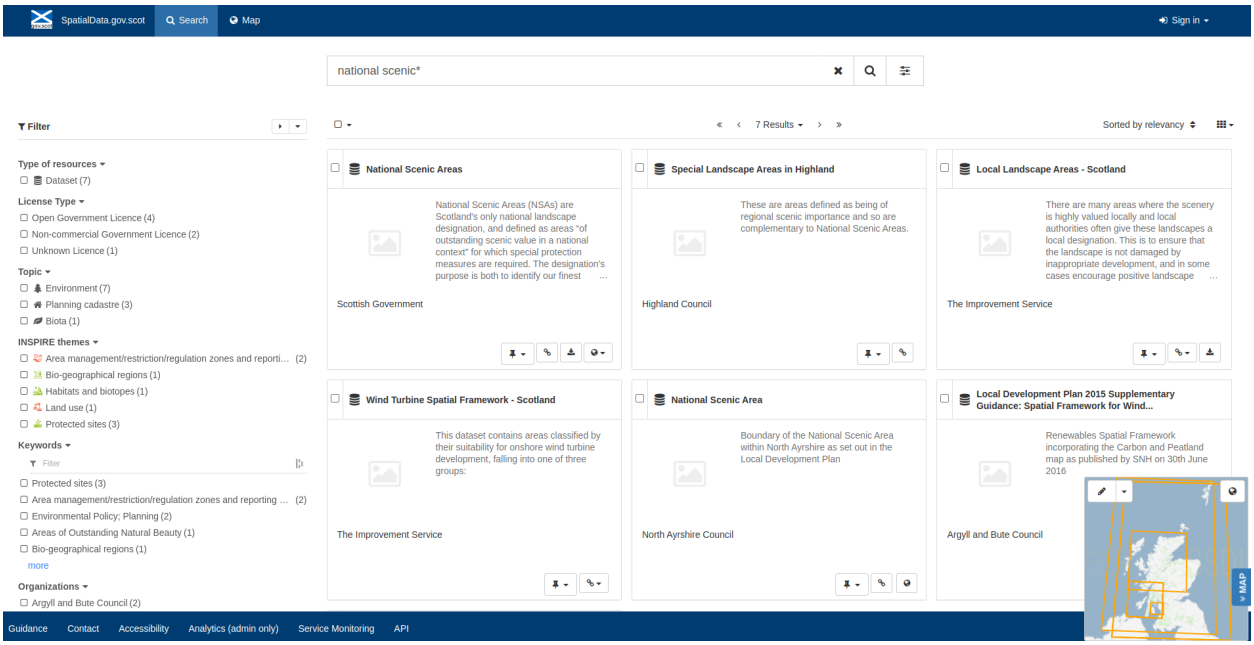


Figure 2.2.2: Search results displayed on the main search panel

3.3 Advanced searching

Other search options are available from the icon to the right of the main search box. This expands to show **Options**, **Languages** and **Advanced**.

- **Options** allows users to search by "Exact match", "In title only", and "Only my records" (if the user is logged in)
- **Languages** allows users to limit the search based on the metadata language of a record by searching "in all languages", "in detected language", or "in UI language"
- **Advanced** allows users to limit the search based on the temporal coverage of a record.

To perform an advanced search:

1| Click

to access the search page.

2| Click the next to the search text box to access advanced options.

3| Provide additional search criteria (e.g. constraining by exact match, language or temporal extent).

4| Click to run the search based on the selected options. Results will be displayed in the list below.

Note: search options can be cleared by clicking .

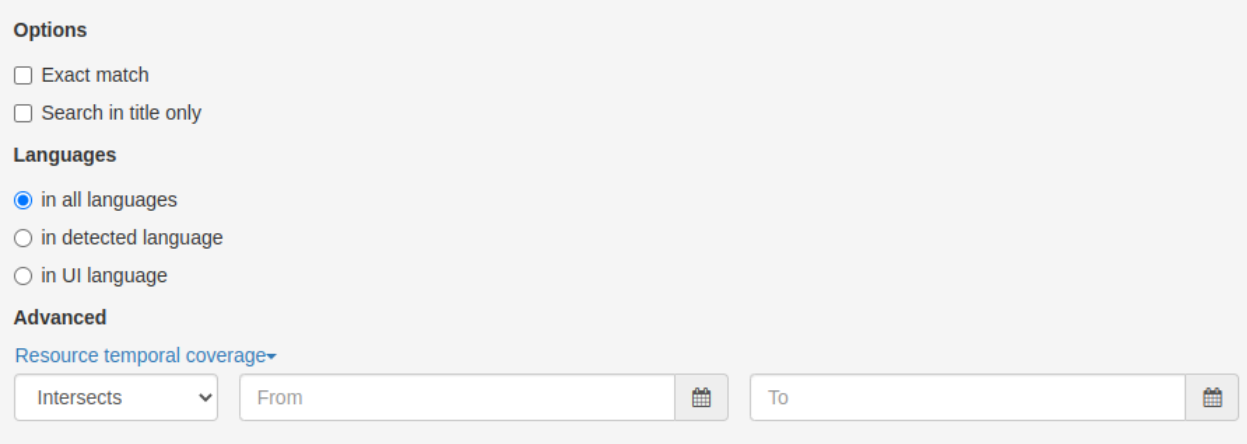


Figure 2.3.1: Advanced search options

3.4 Filter and sort options

Search results can be limited using the options available in the left-hand panel. Each search filter shows the number of records returned next to it. Filtering options available are as follows:

- **Type of resources** (e.g. datasets or services)
- **Licence Type**
- **Topics**
- **INSPIRE Theme**
- **Keywords**
- **Organizations**
- **Years** (grouped in 5-year intervals)
- **Formats**
- **Available in**
- **Spatial Representation Type** (i.e. raster or vector)
- **Update Frequencies**
- **Scales**

At the top right of the search results list, there is a menu to sort the results by **title**, **relevance**, **date of change**, **rating**, **popularity**, and **scale**. At the top left of the results list users can select all results, all results on the current page, or none to deselect. Upon selection users can choose to export the results to a zip, pdf or csv file. Note that registered users will be able to perform additional actions, such as publish (if they have Reviewer privileges) or delete (if they have Editor privileges), on selected records.

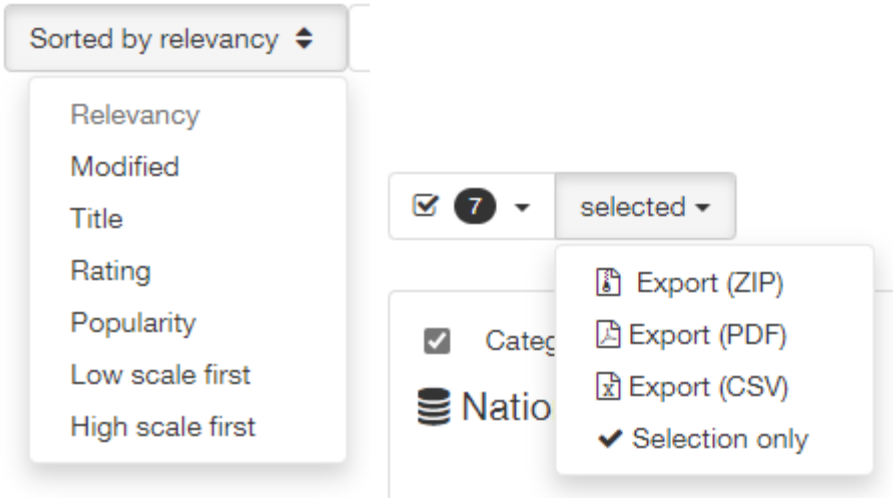


Figure 2.4.1: Sort and select options

CHAPTER

FOUR

VIEWING METADATA AND DATA

This section will guide users and visitors to the site on viewing metadata and previewing data using the interactive map.

4.1 Viewing metadata records

Clicking on the title of a record (from either the search results or those presented on the main page) will allow the user to view the metadata record. Below the record title, the **abstract** provides a brief description of what the dataset (or service) is and what it is used for. The spatial **extent** of the resource can be seen in the map below, in the **Discover data** section. Access to the data itself can be gained from the options listed in the **Links** section.

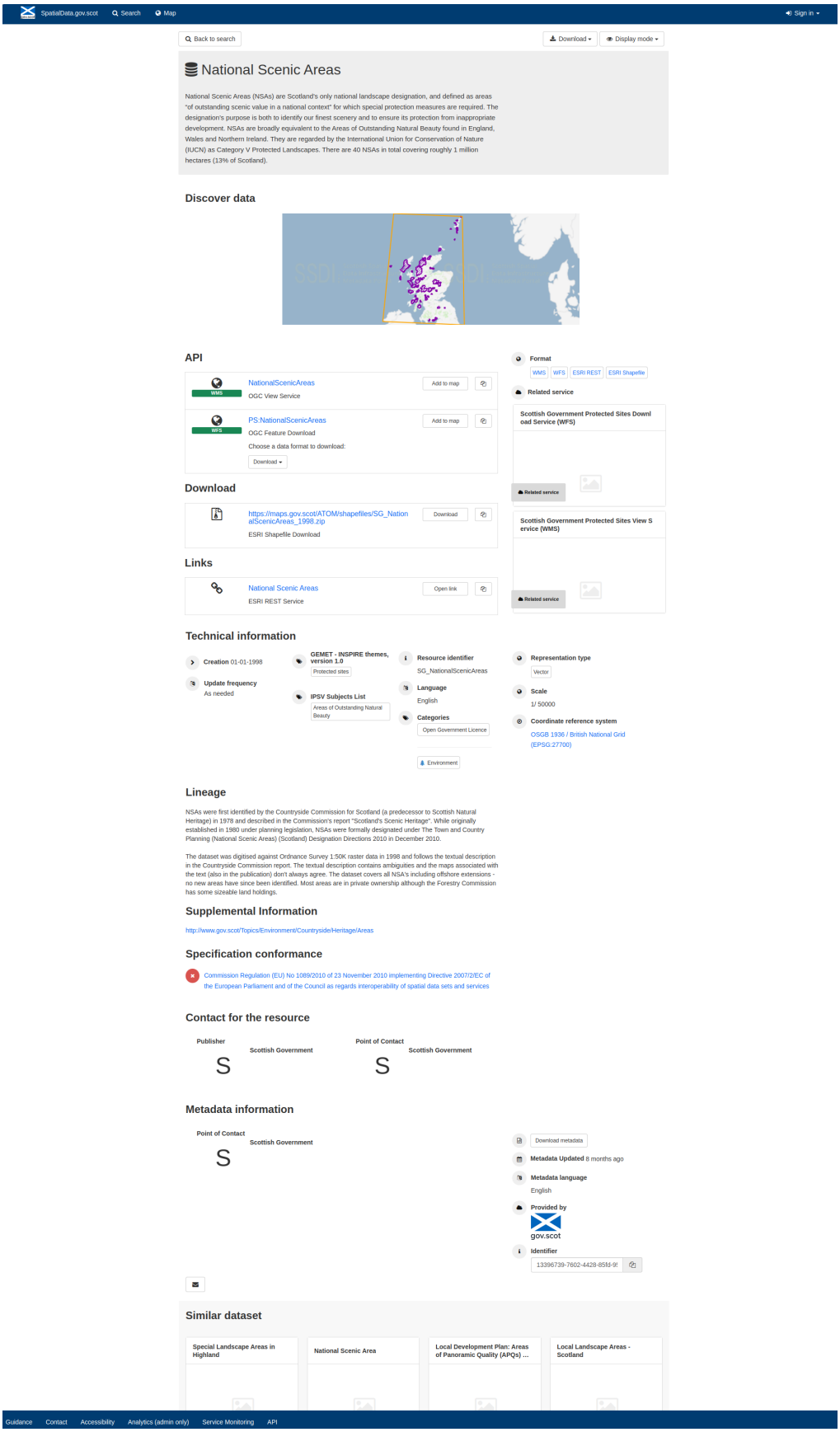
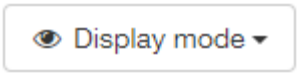

SpatialData.gov.scot
Search
Map
Sign in
Back to search
Download
Display mode
National Scenic Areas
National Scenic Areas (NSAs) are Scotland's only national landscape designation, and defined as areas "of outstanding scenic value in a national context" for which special protection measures are required. The designation's purpose is both to identify our finest scenery and to ensure its protection from inappropriate development. NSAs are broadly equivalent to the Areas of Outstanding Natural Beauty found in England, Wales and Northern Ireland. They are regarded by the International Union for Conservation of Nature (IUCN) as Category V Protected Landscapes. There are 40 NSAs in total covering roughly 1 million hectares (13% of Scotland).
Discover data
API
WMS
NationalScenicAreas
OGC View Service
Add to map
WFS
PS:NationalScenicAreas
OGC Feature Download
Choose a data format to download:
Download
Download
https://maps.gov.scot/ATOM/shapefiles/SG_NationalScenicAreas_1998.zip
ESRI Shapefile Download
Download
Links
National Scenic Areas
ESRI REST Service
Open link
Format
WMS
WFS
ESRI REST
ESRI Shapefile
Related service
Scottish Government Protected Sites Download Service (WFS)
Related service
Scottish Government Protected Sites View Service (WMS)
Related service
Technical information
Creation 01-01-1998
Update frequency
As needed
GEMET - INSPIRE themes, version 1.0
Protected sites
IPSV Subjects List
Areas of Outstanding Natural Beauty
Resource identifier
SG_NationalScenicAreas
Language
English
Categories
Open Government Licence
Environment
Representation type
Vector
Scale
1/ 50000
Coordinate reference system
OSGB 1936 / British National Grid (EPSG:27700)
Lineage
NSAs were first identified by the Countryside Commission for Scotland (a predecessor to Scottish Natural Heritage) in 1978 and described in the Commission's report "Scotland's Scenic Heritage". While originally established in 1980 under planning legislation, NSAs were formally designated under The Town and Country Planning (National Scenic Areas) (Scotland) Designation Directions 2010 in December 2010.
The dataset was digitised against Ordnance Survey 1:50K raster data in 1998 and follows the textual description in the Countryside Commission report. The textual description contains ambiguities and the maps associated with the text (also in the publication) don't always agree. The dataset covers all NSA's including offshore extensions - no new areas have since been identified. Most areas are in private ownership although the Forestry Commission has some sizeable land holdings.
Supplemental Information
http://www.gov.scot/Topics/Environment/Countryside/Heritage/Areas
Specification conformance
Commission Regulation (EU) No 1089/2010 of 23 November 2010 implementing Directive 2007/2/EC of the European Parliament and of the Council as regards interoperability of spatial data sets and services
Contact for the resource
Publisher
Scottish Government
Point of Contact
Scottish Government
Metadata information
Point of Contact
Scottish Government
Download metadata
Metadata Updated 8 months ago
Metadata language
English
Provided by
gov.scot
Identifier
13396739-7602-4428-85fd-9
Similar dataset
Special Landscape Areas in Highland
National Scenic Area
Local Development Plan: Areas of Panoramic Quality (APQs) ...
Local Landscape Areas - Scotland
Guidance
Contact
Accessibility
Analytics (admin only)
Service Monitoring
API

Figure 3.1.1: Default record view

Scrolling down the page, the **Use constraints** section provides information on licensing. The **Technical information** headings provide details on topic categories and keywords, maintenance frequency, coordinate systems and data formats. Information on the history of a resource and how it was created can be found in the **Lineage** section. The **Metadata information** section, as the name suggests, provides information on the metadata itself, as well as the option for the metadata record to be downloaded.

Note that the default view for a metadata record displays a summary of the information in the record. To change the display view of the metadata record:

1| Click on 

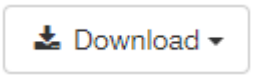
at the top right of the record.

2| Choose 'Full view' to display a detailed view of the record.

For detailed descriptions of each of the elements included in the metadata record, consult the Metadata Elements section.

4.2 Exporting metadata records

Metadata records can be exported from spatialdata.gov.scot via the download icon menu at the top right of the record. To export a record:

1| Click on 

at the top right of the record.

2| Choose the format to export (ZIP, PDF or XML). The permalink option will provide a URL for the record that can be copy and pasted.

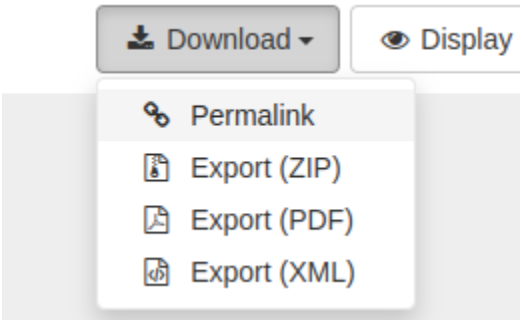


Figure 3.2.1: Export metadata menu

4.3 Previewing data in the map

Spatial data can be previewed in the interactive map using the web services referenced in the metadata. This capability can be accessed either from the search results page, the metadata record view, or from the interactive map tab in the header menu.

To add a layer to the map from the search results page:

1| Click on visible at the bottom right of the record.

2| If there are multiple layers in the service, click the desired layer or choose to add all layers to the map.

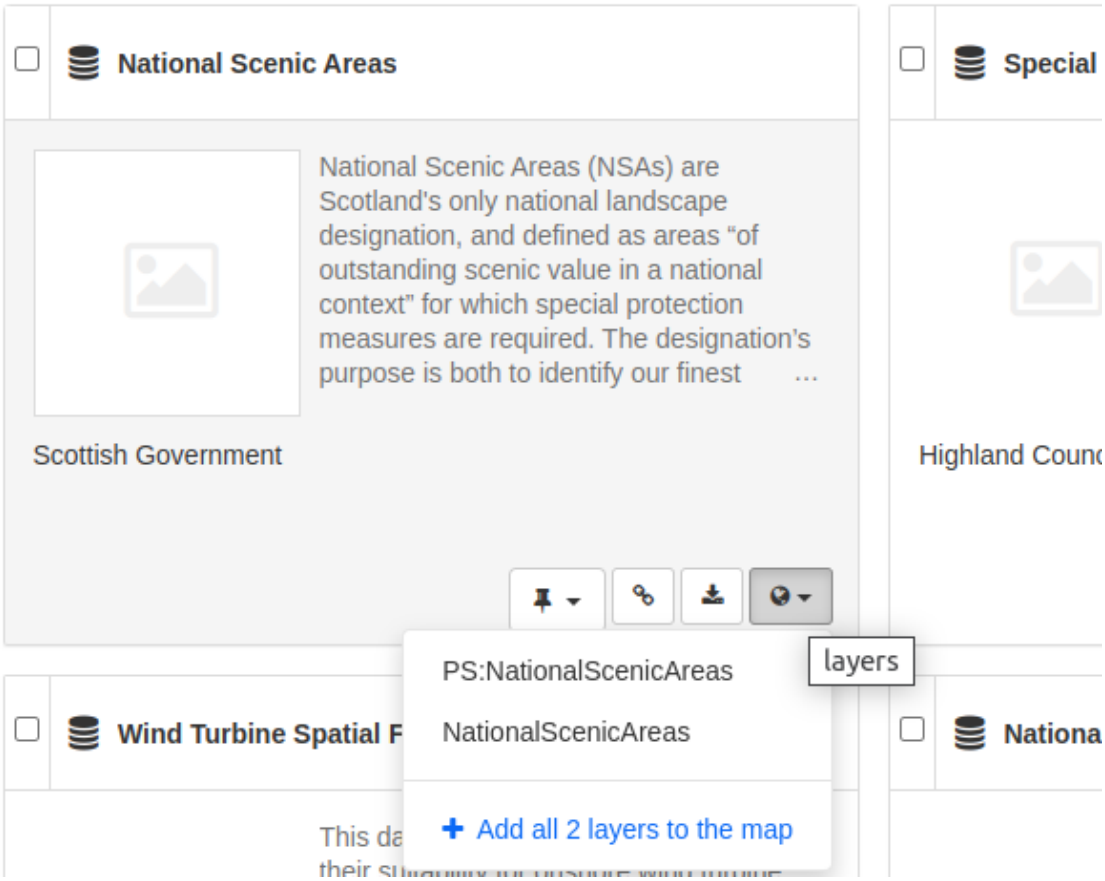


Figure 3.3.1: Adding a layer to the map via the search results page

To add a layer from the main map page:

1| Click on Map in the header menu to navigate to the main map page.

2| On the right-hand side of the map, click + at the top of the menu to open the **Add a Layer from** dialog.

3| On the **Search** tab of the **Add a Layer** dialog, enter text in the search box to find a layer. Alternatively, copy and paste a URL for a service into the **WMS**, **WMTS**, **WFS** or **ESRIREST** boxes on the **Services** tab. KML and KMZ can be added to the map via the **Files** tab.

4| Click Add to map below the layer title to add it to the map. If adding from a URL, click on the layer name or the + next to the name to add it to the map.

Note: when adding straight from the map page, using the search tab, you may see layers with no name. This is caused by the web service layer names not being referenced properly in the associated resources part of the dataset metadata record. Contributors to spatialdata.gov.scot should update their metadata records so their resources in the dataset metadata are named with the layer name as it appears in the service (i.e. as listed in the GetCapabilities request). See the Associated Resources *section for guidance*

on how to set up associated resources.

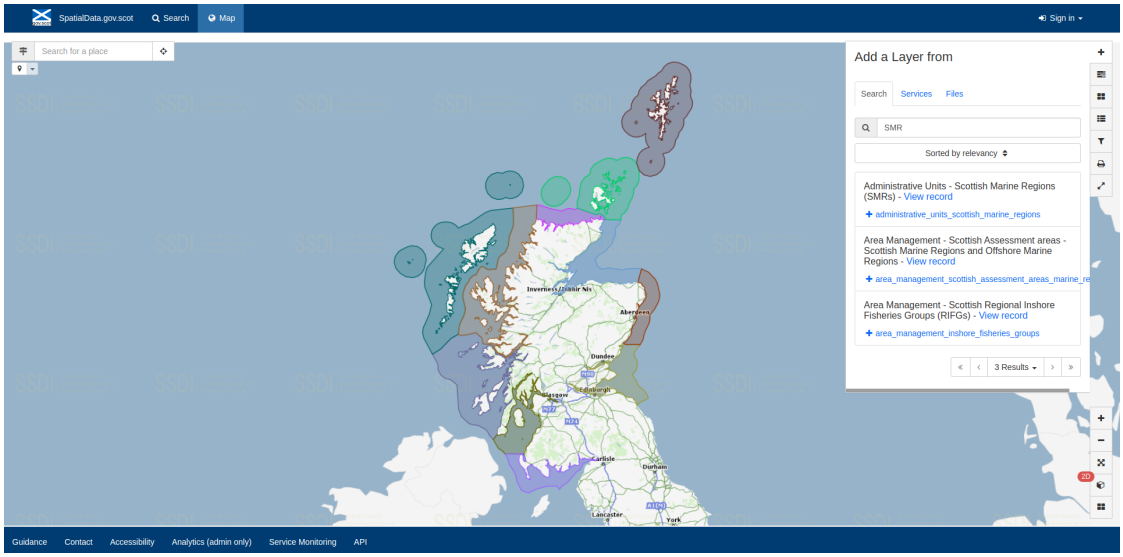


Figure 3.3.3: Adding a layer to the map via the map interface

To add a layer to the map from the metadata record view:

1| Scroll to the **API** section of the record. Services that can be added to the map will have Add to map beside them.

2| For view services (i.e. WMS), Click on Add to map. The user will be automatically taken to the map page.

3| For download services (i.e. WFS), select the layer from the drop down menu then click on Add to map.

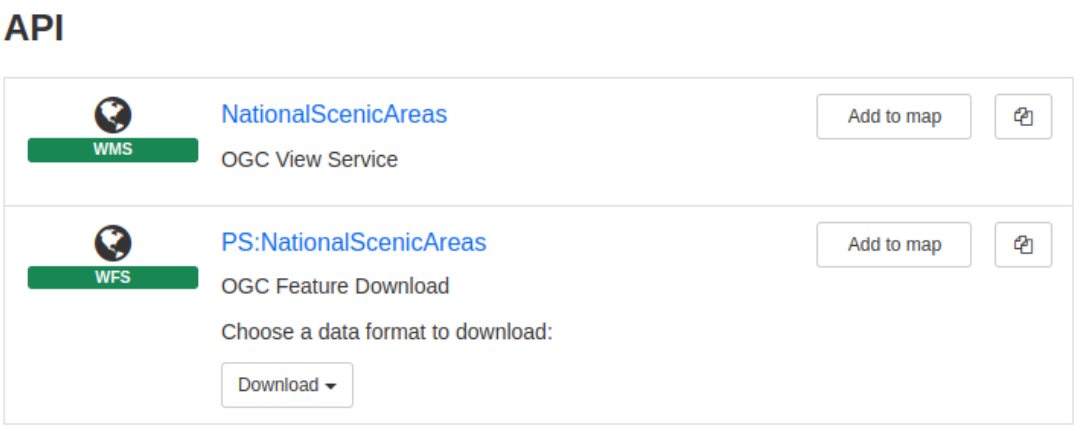


Figure 3.3.2: Adding a layer to the map from the metadata record view

Note: with respect to WFS, users may experience occasions where the layer appears to have been added to the map, yet does not display. This occurs when the Access-Control-Allow-Orgin header (CORS access policy) is missing from the remote server, and thus the request is blocked by the browser. This is out of the control of the portal as it is dependent on the organisations' server configuration, however, an error message will be displayed.

4.4 Managing layers in the map

Available tools for the map are arranged down the right-hand side of the page.

To manage layers displayed in the map:

1| Click on the right-hand side of the map. This will display a list of layers currently added to the map.

Note: those with scale-dependent visibility that are not currently visible will be greyed out. Layers that cannot be added for some other reason, such as an error with the service, will display the layer name in red next to an error icon ( ).

2| To toggle a layer on or off, click on the layer name or check/uncheck the box.

3| Click the arrow icon ( ) to the left of the layer name to access a menu to view the legend, zoom to the extent of the layer, navigate to the metadata, select syle (if available) or adjust the opacity.

To view (or hide) the layer legend, click .

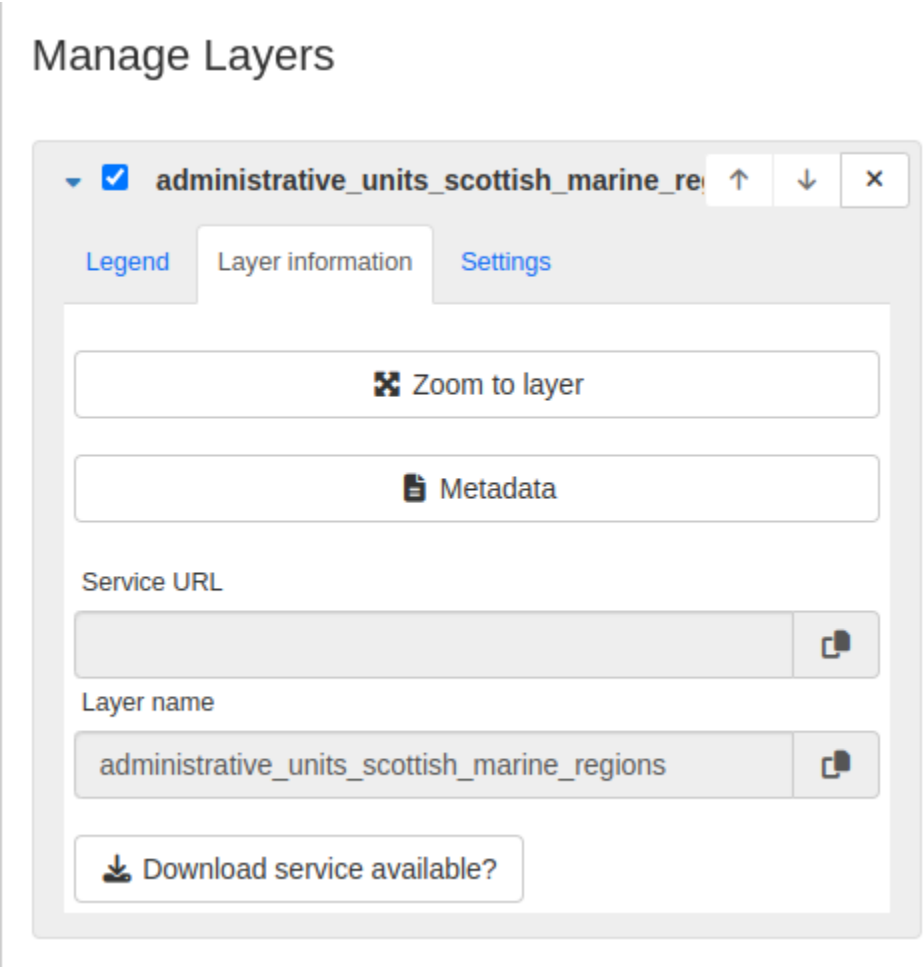


Figure 3.4.1: Manage layers menu

4.5 Print the map

To print the current map:

1| Click from the menu on the right-hand side of the map.

2| In the appropriate boxes, enter text for the title of the map and a description or credit for the map if desired.

3| Choose the desired layout (landscape, overview or portrait).

4| Choose the auto option for scale, or uncheck and select the desired scale from the dropdown list.

5| Check the print legend box to include the legend on the map.

6| Select the desired format (either PDF or PNG) and click

.

Note: the print area will be highlighted on the map.

Figure 3.5.1: Printing the current map

4.6 Other map functions

Other functionality available from the tabs on the main map page is as follows:

Default Map: via the manage layers tab, allows the user to reload the default map settings (removes all layers, etc.).

Measure: allows the user to draw a line on the map to measure it's length. Single-click to create a node and double-click to finish.

Projection Switcher: change the projection of the map to one of the supported projections in the dropdown list.

Zoom in and out: zoom in or out on the map.

Zoom to initial map extent: zoom to the full extent of the map.

Graticule: adds a grid to the map (in lat/long).

CHAPTER

FIVE

REGISTERED USERS

This section will guide registered users on how to sign in and manage their accounts.

5.1 Becoming a registered user

To add or edit metadata on SpatialData.gov.scot, your organisation must be registered on the site. The portal does not currently allow self registration, and therefore interested parties should contact (SSDI.Metadata@gov.scot). Currently, user accounts are created for organisations as a whole rather than individuals.

5.2 Registered user obligations

When an organisation becomes a registered user and submits metadata to SpatialData.gov.scot, they commit to the following **operational and service requirements**:

- Maintaining the discovery metadata added by the organisation:
  - by **assuring its quality** against appropriate standards
  - by reviewing it, **updating it regularly**, and ensuring it is updated when new versions of data, data series or on-line services are published.
  - **maintaining metadata file identifiers** (GUID) throughout the life of the metadata resource (new GUIDs should only be created when new resources are published, to prevent duplicate metadata resources).
- Adopting a process of **continuous improvement** for the resources published by the organisation, based on the feedback received.
- **Compliance with the INSPIRE** Metadata Regulation operational requirements, as set out in this guide.
- To publish INSPIRE compliant **view services** for a given dataset or data series and reference them appropriately in the metadata, as set out in this guide.
- Legal compliance with the INSPIRE Directive when publishing data that comes under an **INSPIRE Theme** and contains features listed in the INSPIRE Data Specifications.
- Compliance with the INSPIRE Network Services Regulation when publishing INSPIRE Network Services.

5.3 Signing in

To sign in to an existing account:

1| Click the Sign in in the header menu.

2| Enter your organisations' account user name and password.

3| Click the Sign in button.

Note: user names and passwords are case sensitive.

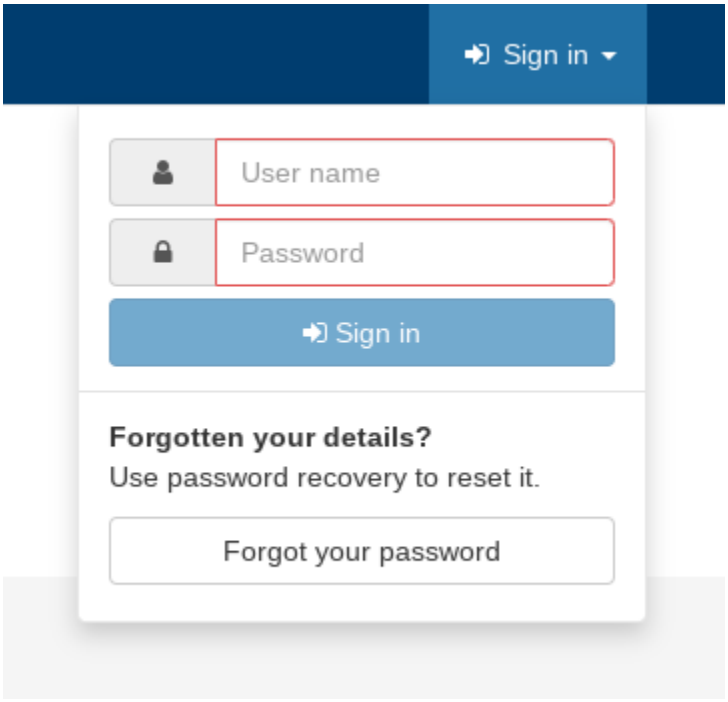


Figure 4.3.1: Signing in to a registered account

To recover a forgotten password:

1| Click the Sign in in the header menu.

2| Click the Forgot your password at the bottom of dropdown window.

3| Enter the account user name at the bottom of the page that opens (below the Sign in section).

4| Click the Send password link to my email button. This will send an email to the address registered to that user account providing a link to reset the password.

Note: user names are case sensitive. The password recovery function requires that a valid email address (accessible by the user) is registered with the user account in question. If you have not registered an email address or do not have access to the relevant mailbox, you will not be able to receive password reset emails.

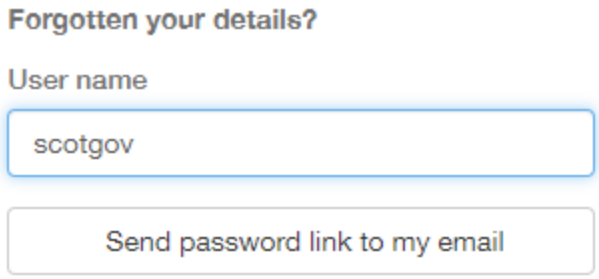


Figure 4.3.2: Resetting a forgotten password

5.4 User account management

Once logged in, users can manage their account details by clicking on their profile name displayed in the header. This will take the user to the account admin page. From this page users can enter or change contact details for themselves and other users and reset passwords.

Note: a user can only reset its own password, not other users' passwords.

To reset an account password:

1| Click on either the user profile name or the user name in the header. By default the Manage users page should be presented. Click the user name on the left hand side under 'Users' to display the user account information.

2| Click the Reset password button.

3| Enter a new password in the Password text box. Repeat the password in the box below.

4| Click the Reset password button to confirm the change.

Note: passwords are case sensitive and must be at least 8 characters long.

When amending details, users should click the Save button to save changes.

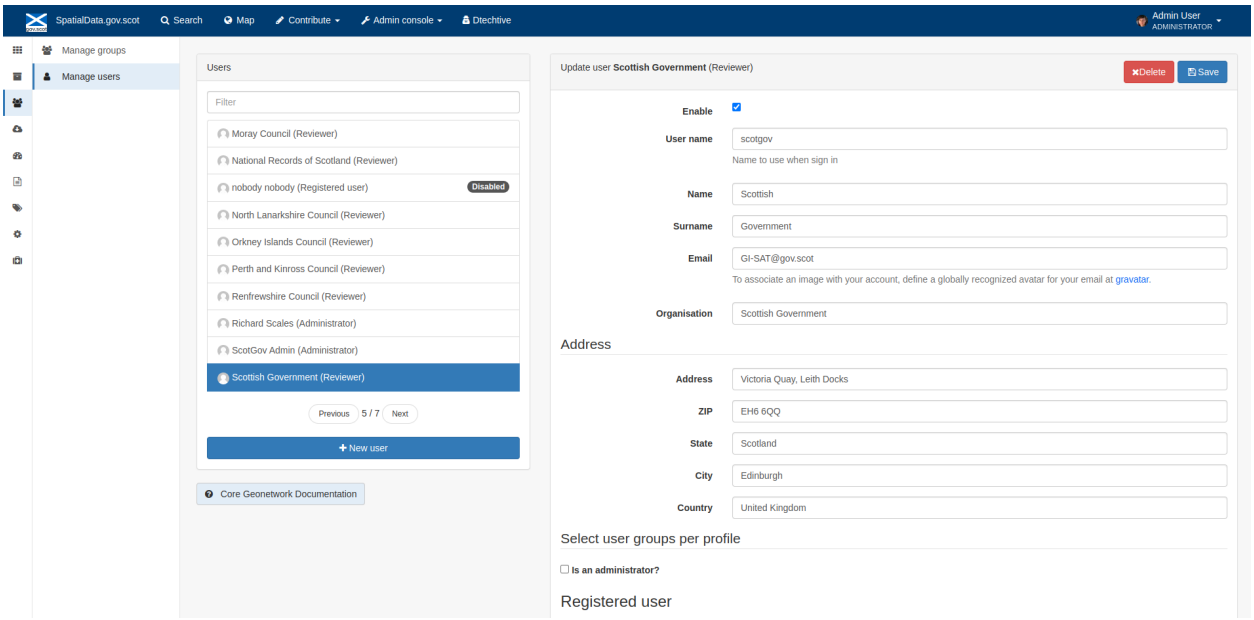
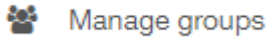


Figure 4.4.1: The account management page

Note that there is also a 

tab. Generally each user account is an administrator for a group of the same name. On this tab users can manage group names and contacts as wells as assign logos for the group (which will appear on record view) - groups can be thought of as the 'publishing body'. Groups can have multiple user accounts associated with them, and users may be a part of a number of groups.

5.5 Users and groups

SpatialData.gov.scot employs the concept of users, groups and profiles. *Users* are those accounts registered on the portal, and can be part of one or more *groups* (which are collections of users corresponding to logical units, such as teams within an organisation). The *group* and *profile* (or role) of a user defines what tasks they can perform on the portal or on specific metadata records.

The rights associated with the various profiles are as follows:

1) Administrator Profile

The Administrator has special privileges that give access to all available functions. These include:

- Full rights for creating new groups and new users
- Rights to change users/groups profiles
- Full rights for creating/editing/deleting new/old metadata
- Perform system administration and configuration tasks.

2) User Administrator Profile

The User Administrator is the administrator of his/her own group with the following privileges:

- Full rights on creating new users within the own group
- Rights to change users profiles within the own group

- Full rights on creating/editing/ deleting new/old data within the own group

3) Content Reviewer Profile

The content reviewer is the only person allowed to give final clearance on the metadata publication on the Intranet and/or on the Internet:

- Rights on reviewing metadata content within the own group and authorising its publication

4) Editor Profile

The editor works on metadata with following privileges:

- Full rights on creating/editing/ deleting new/old data within the own group

5) Registered User Profile

The Registered User has more access privileges than non-authenticated Guest users:

- Right to download protected data

Note: profiles (or roles) are hierarchicaland based on inheritance. This means that a user with an Editor profile can create and modify new metadata records, but can also use all functions a Registered user can use.

Normally, organisations registered on the site are given the role of *Content Reviewer* for the purpose of managing their metadata records.

CHAPTER

SIX

CREATING DISCOVERY METADATA

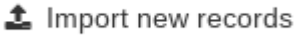
This section will guide the user through the process of creating discovery metadata records on spatialdata.gov.scot. Discovery metadata can be added to the portal by *importing an existing metadata* XML file, *creating a new record from a template*, *duplicating an existing record*, or *harvesting records* from other metadata portals.

6.1 Importing existing metadata

Prior to following the steps below to import an existing metadata record, please review Annex 1.

To import an existing XML metadata record:

1| Click the

button in the header menu and choose 

. This will take the user to the **Import new records** menu board.

2| Select where to import the record from. Options are from your computer (default), a URL, by copy/paste, or from a server.

3| Select **Metadata** from the type of record dropdown.

4| Indicate how the unique identifier for the record (UUID) should be treated. If you are uploading in order to refine or change an existing record, then choose the **Overwrite metadata with the same UUID** option. If you are uploading to create a new metadata record then choose the **Generate UUID for inserted metadata** option. If the XML contains a UUID that does not already exist on the portal but you would like to keep this UUID then the **None** option should be selected.

Note: The UUID is a generated automatically by whatever internal system (i.e. ESRI ArcGIS) was used to write and manage your metadata. In xml, it can be found at the top of the page under the file identifier section. Within the portal, the UUID or File Identifier can be found at the bottom of the metadata record display. This UUID, together with the metadata date stamp, are used to ensure records are unique within spatialdata.gov.scot, data.gov.uk *and other metadata catalogues.*

5| Under the **Apply XSLT conversion** menu, select the appropriate translation to convert the metadata to the UK Gemini format.

Note: For an xml file that is already in Gemini 2.3 format and recognised as such (see Annex 1*), the* **Apply XSLT conversion** *option can be set to 'None'. Select 'GEMINI 2.2 to GEMINI 2.3' to convert an existing Gemini 2.2 record to 2.3, select 'ESRI to GEMINI 2.3 to convert records created using the ESRI ArcGIS platform. Users providing data in MEDIN format should select the MEDIN to GEMINI conversion.*

6| Optionally, select whether to validate the record on import.

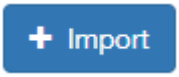
Note: it is recommended that the validate option be left un-ticked, and users perform a validation of the record after import. If the validation option is ticked and an error is found, the record will fail to import.

7| Optionally, select whether to publish the record on import.

8| Assign the record to a user group.

9| Assign the record to the appropriate licence type (i.e. OGL, NCGL, INSPIRE or other). This will allow for filtered searching based on the licence conditions.

Note: Licence types can also be amended at a later date. See assigning a licence category.

10| Click the 

button.

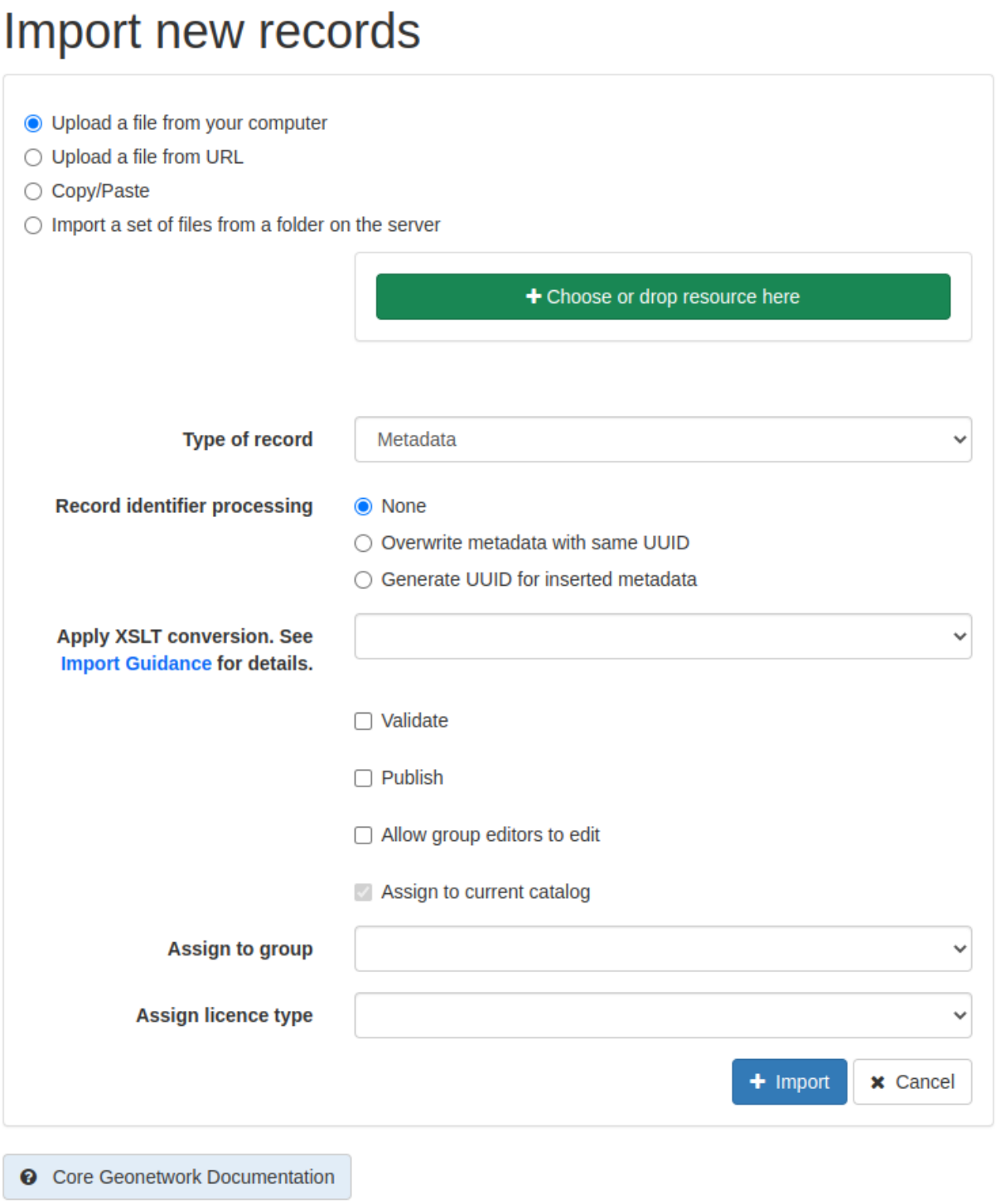


Figure 5.1.1: Importing an existing XML metadata record

When the import operation has finished, an **Import Report** will be displayed on the right-hand side of the screen, indicating whether or not the import has been successful. Following a successful import, users should verify that their records are valid. Consult the Validating metadata section for details. Amendments to the record may be required to make it fully Gemini compliant.

6.2 Creating metadata from a template

Basic templates are available for users to create metadata directly on spatialdata.gov.scot.

To create a metadata record using an available template:

1| Click the Contribute button in the header menu.

2| Click the Editor board button. This will enable the **Editor** board, where all records the user has access to will be listed.

3| Click the Add new record button.

4| Choose the type of record to be created based on the type of resource that is being documented, i.e. a dataset, series or service record. When selected available templates for that type are displayed.

Note: templates for dataset and service metadata are slightly different. Metadata for a service has extra elements for the spatial data service type (i.e. view, download, etc.) and for coupled resources. You must choose the correct template for the type of record being documented as it is not possible to change once the record has been created.

5| Click on the template to be used.

6| Click the Create button to create the new record. This will automatically take the user to the editing view where elements of the new record can be modified. See Editing a metadata record for guidance on documenting the resource.

Note: if the user is an editor for multiple groups or an administrator to the site, they may be presented with multiple templates of the same name. Additionally, they will be required to select which group to assign the metadata record to.

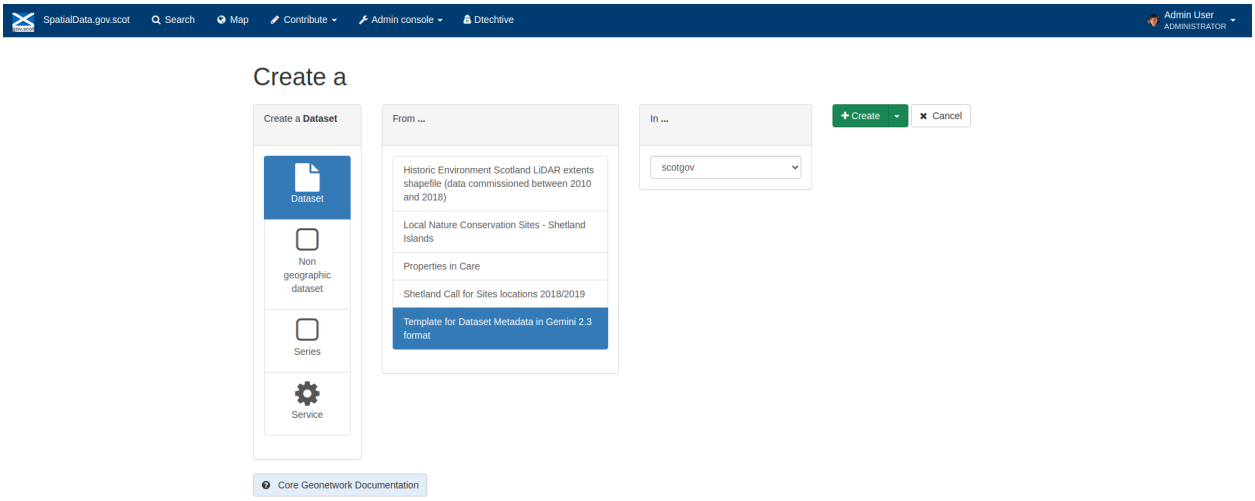


Figure 5.2.1: Creating a metadata record from a template

6.3 Duplicating existing metadata

One of the easiest ways to create metadata on the portal is to duplicate an existing record. This is particularly useful for organisations where many of the metadata elements are the same for all records (e.g. points of contact, etc.)

To create a metadata record by duplicating an existing record:

1| Click the Contribute button in the header menu.

2| Click the Editor board button. This will enable the **Editor** board, where all records the user has access to will be listed.

3| Click the duplicate icon ( ) next to the record name.

4| Click the Create button to create the new record. This will automatically take the user to the **Editor** board where elements of the new record can be modified. See Editing a metadata record for guidance on documenting the resource.

Note: if the user is an editor for multiple groups or an administrator to the site, they will be required to select which group to assign the duplicate metadata record to.

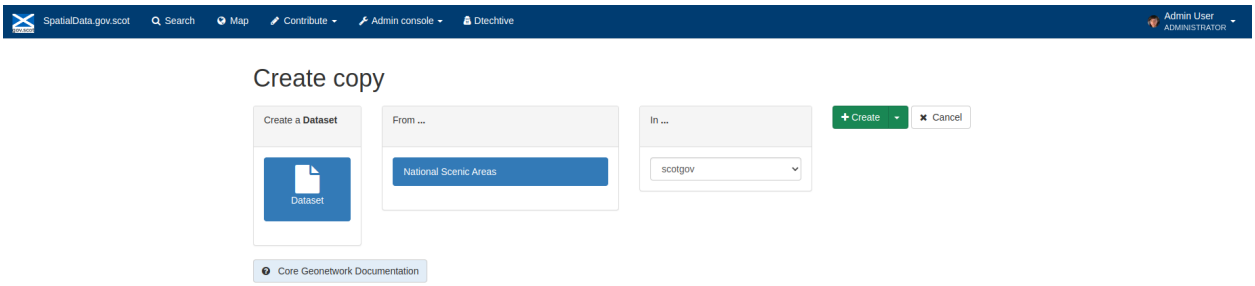


Figure 5.3.1: Duplicating an existing metadata record

6.4 Harvesting metadata

Spatialdata.gov.scot has the capability to automatically consume metadata from external services on a scheduled basis. Organisations that maintain their own spatial data portals which are interested in having their records automatically harvested should contact SSDI.Metadata@gov.scot.

6.5 Creating directory metadata

Directory records are a means of automatically populating fields such as those for the point of contact section of a metadata record with pre-written values. This is useful if you have to create multiple records that share the same point of contact.

To create a contact directory entry:

1| Click the Contribute button in the header menu.

2| Click the Manage directory from the contribute drop down. This will bring the user to the manage directories page.

3| On the entries tab of the relevant section (e.g. **Organisations & contacts**) there are previously created directory entries. Under the **Actions** drop menu of each record, users can choose to edit or duplicate an existing record.

4| Amend the entry as appropriate and click Save to save changes.

5| Click Save & close to save and exit.

Alternatively, users can create a blank directory entry using an existing template:

1| Click on the **Templates** tab for the relevant section (e.g. **Organisations & contacts**)

2| Choose **Duplicate** from the **Actions** menu of the 'TEMPLATE TO DUPLICATE' entry. This will generate a second 'TEMPLATE TO DUPLICATE' template entry.

3| Choose **Edit** from the **Actions** menu of either of the 'TEMPLATE TO DUPLICATE' entries.

4| Amend the entry as appropriate and click **on the arrow** next to Save and choose **Save as directory entry**. This will turn the modified template into a directory entry that can be used to populate metadata records.

5| Click Save & close to save and exit.

Note: The individual name field is not mandatory for the UK Gemini standard, however, for directories it can be used to identify teams/business areas if you have a number of different contact details within an organisation (e.g. GIS, Planning, etc.)

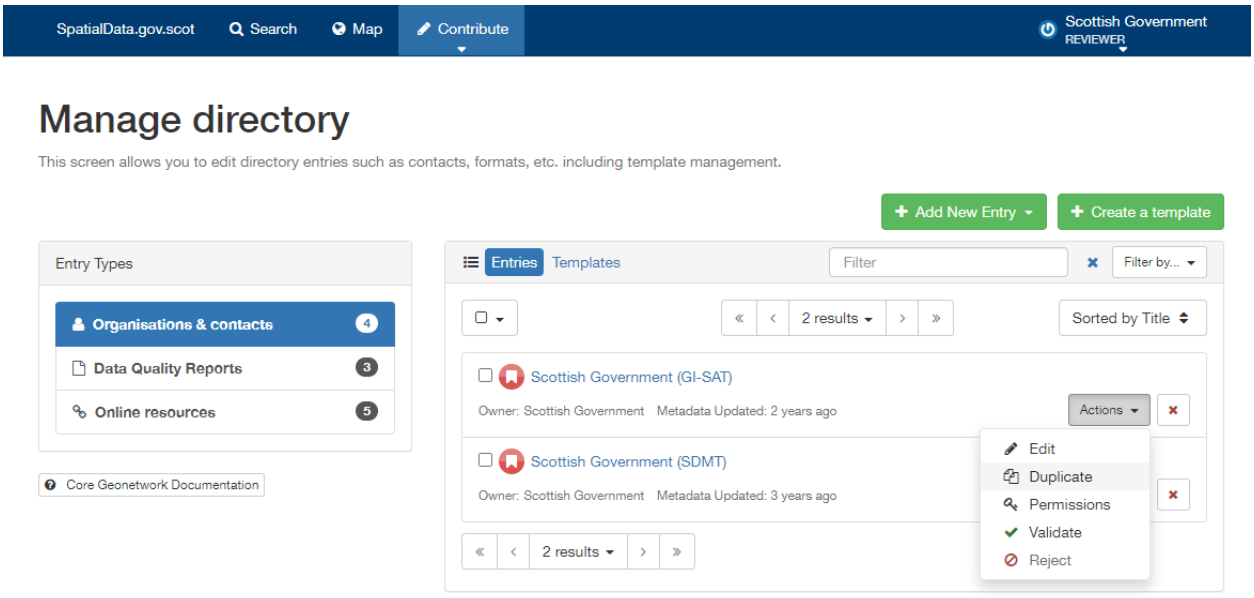


Figure 5.5.1: Creating a directory entry

CHAPTER

SEVEN

EDITING METADATA

This section will guide the user through editing a metadata record on spatialdata.gov.scot, compliant to the UK Gemini standard. In most cases, the basic functionality provided by the *default view* of an editing sessions will be sufficent for the users need, however, in some instances additional functionality from the *advanced view* may be required. For detailed information on completing each of the individual metadata elements, refer to the Metadata Elements section.

7.1 Starting an editing session

Users will be able to edit any records they have contributed to the portal, or if they have appropriate privileges to edit records submitted by others (e.g. administrators).

To begin an editing session:

1| Sign in using your account credentials.

2| Either search for a particular record direct from the home page or click

in the header and select

to open the **Editor** board and search or scroll for the record.

Note: if the 'only my records' box at the top left of the Editor board is checked, this will limit the record list to only those belonging to that user.

3| Click the pencil icon ( ) visible in the search results list, or next to the record name on the **Editor** board. This will enter the user into an editing session.

Note: users can also start an editing session from the record view page by clicking

at the top of the page.

7.2 Editing basics

Once in an editing session, the user is presented with the simple *default* editing view. In the header menu, buttons are available for modifying the categories, group that the record belongs to, validation, cancelling the edit session, and saving the record. On the right side of the page, the *Associated resources* panel is visible, showing all related online resources and service records related to the record being edited.

The form displays the metadata elements grouped into relevant sections. The user can navigate through the form using

the *table of contents* visible in the lower right of the screen (click to display). Clicking an element section will take the user to the relevant section of the form. The user can collapse all elements of the form by clicking the button visible just below the header. Clicking on a section title will re-expand that section. The and buttons allow the user to place the section further up or down the document order. Note that UK Gemini is only concerned with whether the elements (or sections) are present and correct, not with the order they are displayed. For detailed guidance on filling out each element, users should consult the Metadata Elements section.

Mandatory fields (e.g. Abstract) are highlighted with a red asterisk. Note that for sub-elements, this only indicates that the sub-element is mandatory within its context. For example, the vertical extent is an optional element, but if the record requires one, then the minimum and maximum values are mandatory.

Where a button is displayed, the user can click this to add another occurrence of an element or section. For example, a record could have more than one alternative title. When the user hovers over a section and a appears, clicking the cross will delete that element or section.

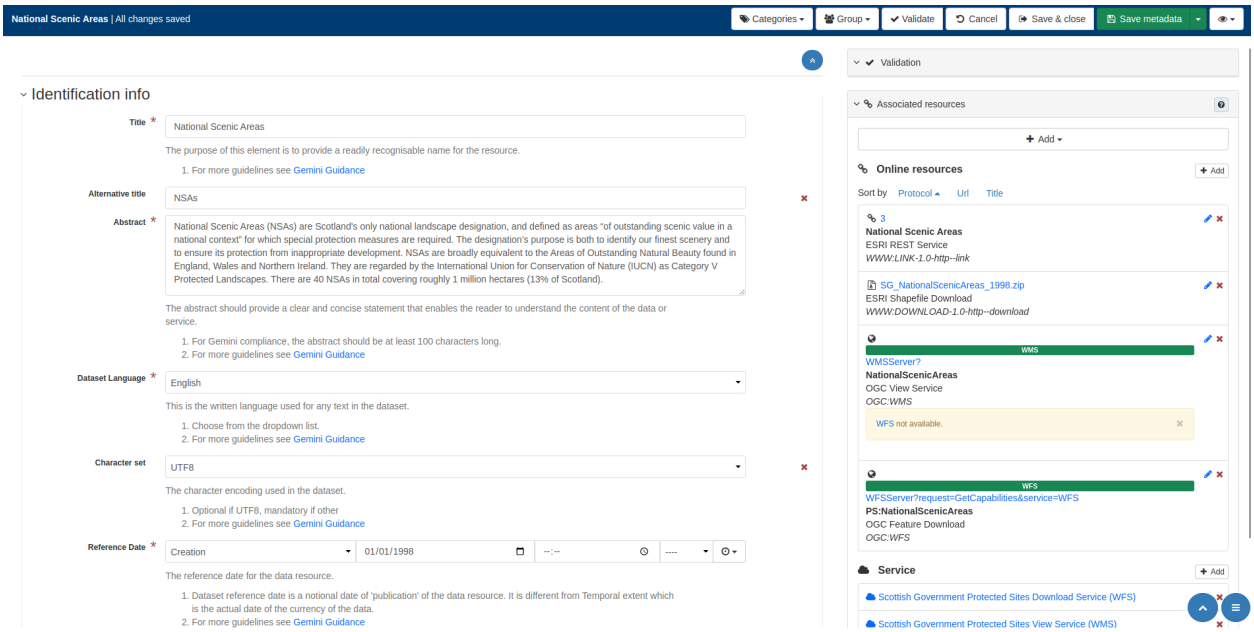


Figure 6.2.1: The default view of the editing session interface

7.3 Changing the editing view

Sometimes it will be necessary for the user to change the view to enable additional functionality. For example, to add a new occurrence of an element when the is not visible in the default view.

To change the view of editing session:

1| Click on on the top right of the editing board.

2| From the dropdown menu, choose either Default, Advanced or XML. Advanced (full) view is a more detailed version of the default (simple) view, where as XML view allows the user to edit the raw XML.

Note: users can also enable tool tips from the view menu.

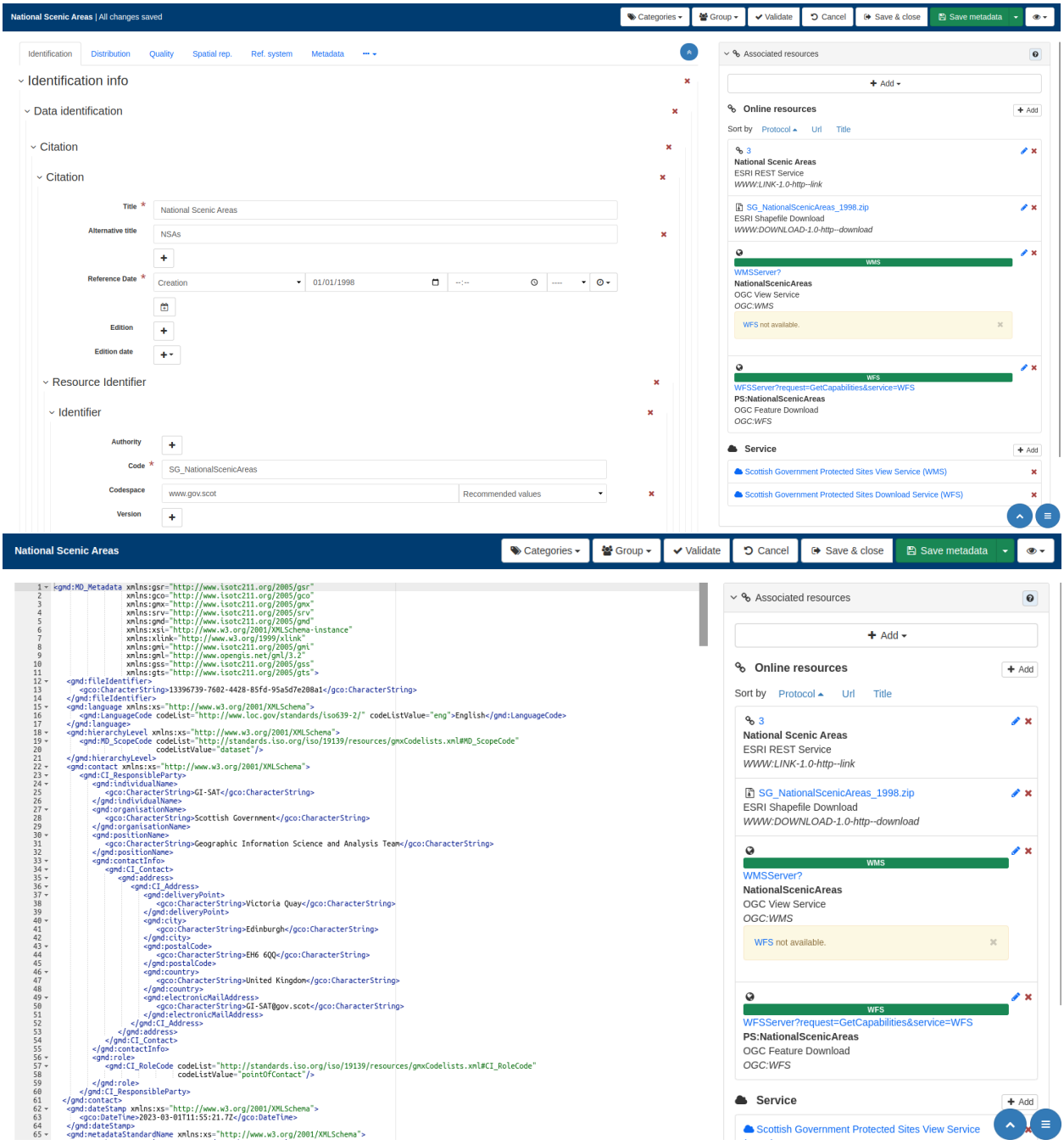


Figure 6.3.1: Advanced editing and XML view

7.4 Assigning a licence category

Records can be classified based on their licence type (i.e. Open Government, Non-commercial Government, INSPIRE or other) using the assign category function. This classification can be done either in an editing session, via the contribute board, or when a record is imported into spatialdata.gov.scot.

To assign or change the licence category in an editing session:

1| Click on

in the header.

2| From the dropdown menu, check the appropriate licence type (Open Government, Non-commercial, INSPIRE or other).

3| Click anywhere to dismiss the menu.

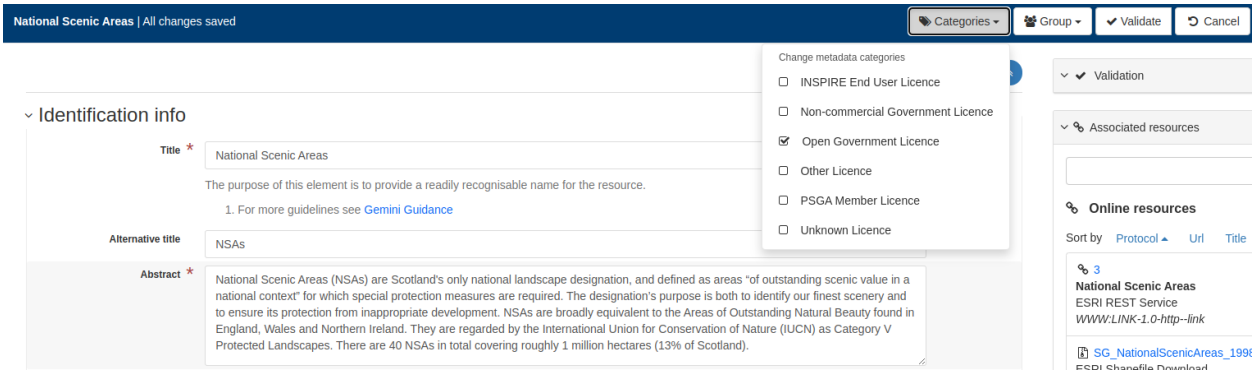
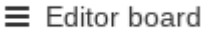


Figure 6.4.1: Assigning a licence category in an editing session

To assign or change the licence category via the contribute board:

1| Click on

in the header.

2| Click the 

button. This will enable the **Editor** board, where all records the user has access to will be listed.

3| In the record list, select the record(s) for which the licence category will assigned or amended.

Note: the licence category can be updated for multiple records at a time.

4| Click the dropdown labelled 'selected' at the top left of the record list and choose 'Update licence' from the list. This will display the licence categories dialog.

5| From the menu, check the appropriate licence type (Open Government, Non-commercial, INSPIRE or other).

6| Click

to apply the changes.

The licence category can also be assigned using the appropriate option when importing a record. For those organisations which harvest their metadata records into the portal, a default licence type can be selected for all records, though any records that differ from the default setting would need to be amended post harvest.

7.5 Associated resources

The Associated Resources panel allows users to add online resources to their metadata and create relationships between dataset and service records (i.e. coupled resources). When in an editing session, the associated resources panel can be found at the top right of the page.

To add an online resource to *dataset* metadata where a corresponding *service* record exists:

1| Click on the

button at the top of the Associated Resources panel.

2| From the dropdown menu select 'Link to a service'. This will display the Link resources dialog.

3| Search using the free text box and click on the service record in the results list to select it (when selected it will be highlighted in blue).

4| This will display the layers available in the service. Click on the appropriate layer to select it (when selected it will be highlighted in green).

5| Click on the

to link the service to the dataset metadata. This creates a link between the dataset and service records and adds an online resource element to the dataset record.

6| If required, amendments can be made by clicking on the pencil icon beside the newly added online resource in the associated resources panel. Alternately scroll to the element in the main editing board and amend manually.

7| Click

.

Note: For web services (i.e. WMS and WFS) to correctly display in the map, you must ensure that the protocol and layer name are correctly entered for the online resource. For dataset records the URL for for a WMS or WFS should **not** *include the GetCapabilities request. While these elements are not required for Gemini compliance, the are needed to enable previewing on the map.*

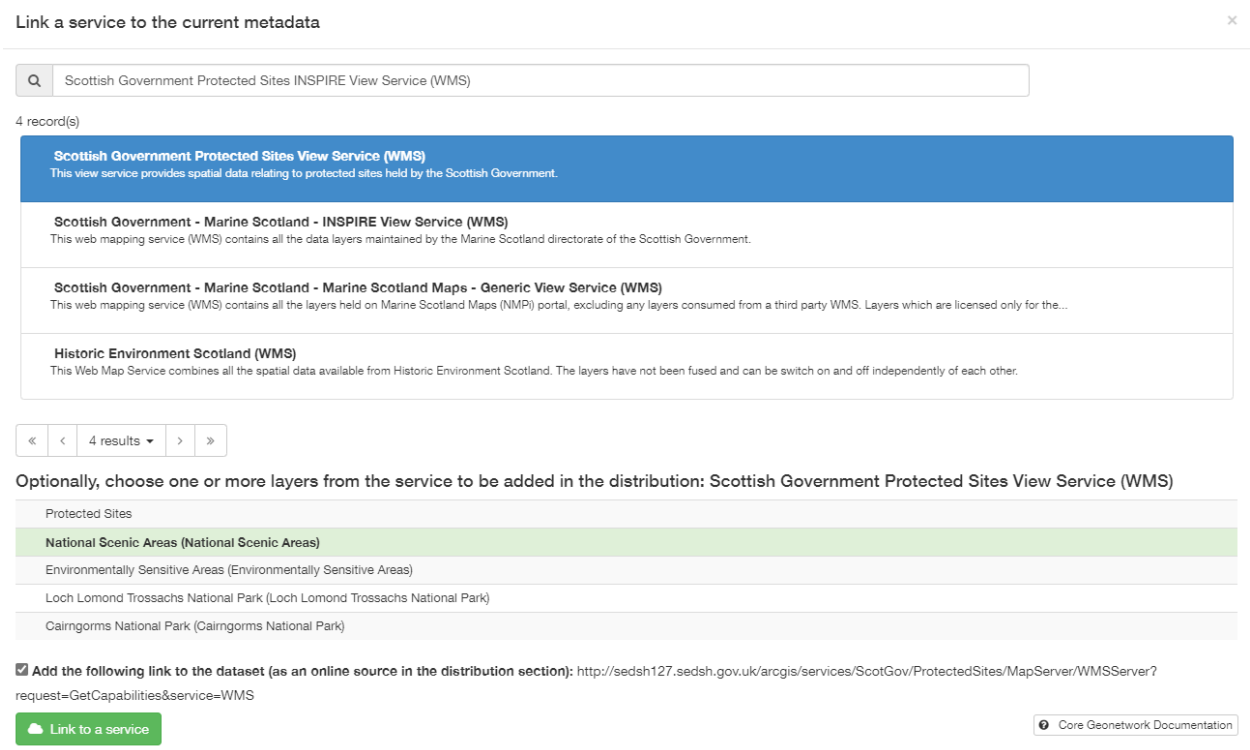


Figure 6.5.1: Adding an online resource to a dataset by associating with a service record

To add an online resource to *dataset* metadata where **no** corresponding *service* record exists:

1| Click on the

button at the top of the Associated Resources panel.

2| From the dropdown menu, select the first option, 'Link and online resource'. This will display the Link resources dialog.

3| Ensure the 'Add online resource' radio button is clicked.

4| Add the URL to ensure it points at the service (e.g. www.mapdata.scot/ServiceName/MapServer/WMSServer?). For dataset records the URL for for a WMS or WFS should **not** include the GetCapabilities request.

5| Set the correct protocol for the service from the drop down (e.g. OGC-WMS Web Map Service). This will then display the layers available in the service.

6| Click on the appropriate layer to select it (it will highlight in green).

7| Click

.

Note: For web services (i.e. WMS and WFS) to correctly display in the map, you must ensure that the protocol and layer name are correctly entered for the online resource (steps 5 and 6 above). While these elements are not required for Gemini compliance, the are needed to enable previewing on the map.

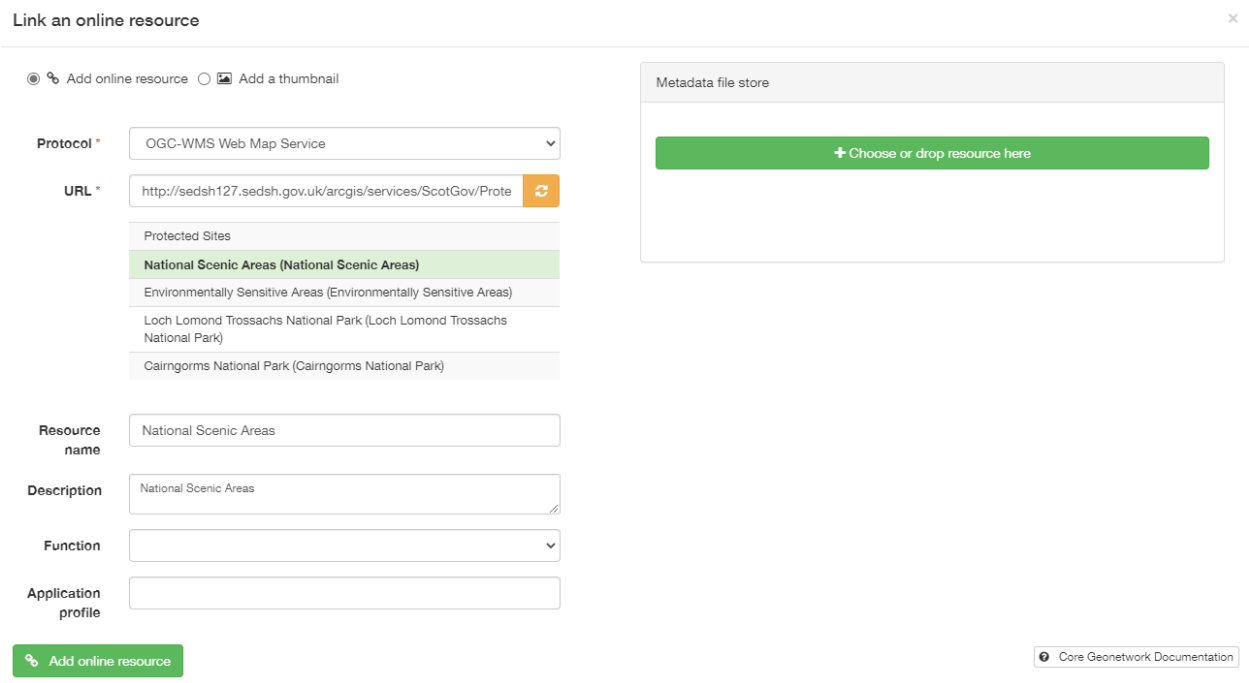


Figure 6.5.2: Adding an online resource to a dataset record

To add an online resource (e.g. WMS or WFS) to a *service* metadata record:

1| Click on the

at the top of the Associated Resources panel.

2| From the dropdown menu, select the first option, 'Link and online resource'. This will display the Link resources dialog.

3| Ensure the 'Add online resource' radio button is clicked.

4| Select the appropriate protocol for the online resource (e.g. for a WMS, select OGC-WMS Capabilities service)

5| Enter the URL for the service.

Note: A service may contain multiple layers and these will be displayed when the service URL is entered. As this is a service record, it is not necessary to select a single layer to link to (this is only required for dataset records).

6| Optionally, provide a name and description for the resource.

7| Click

.

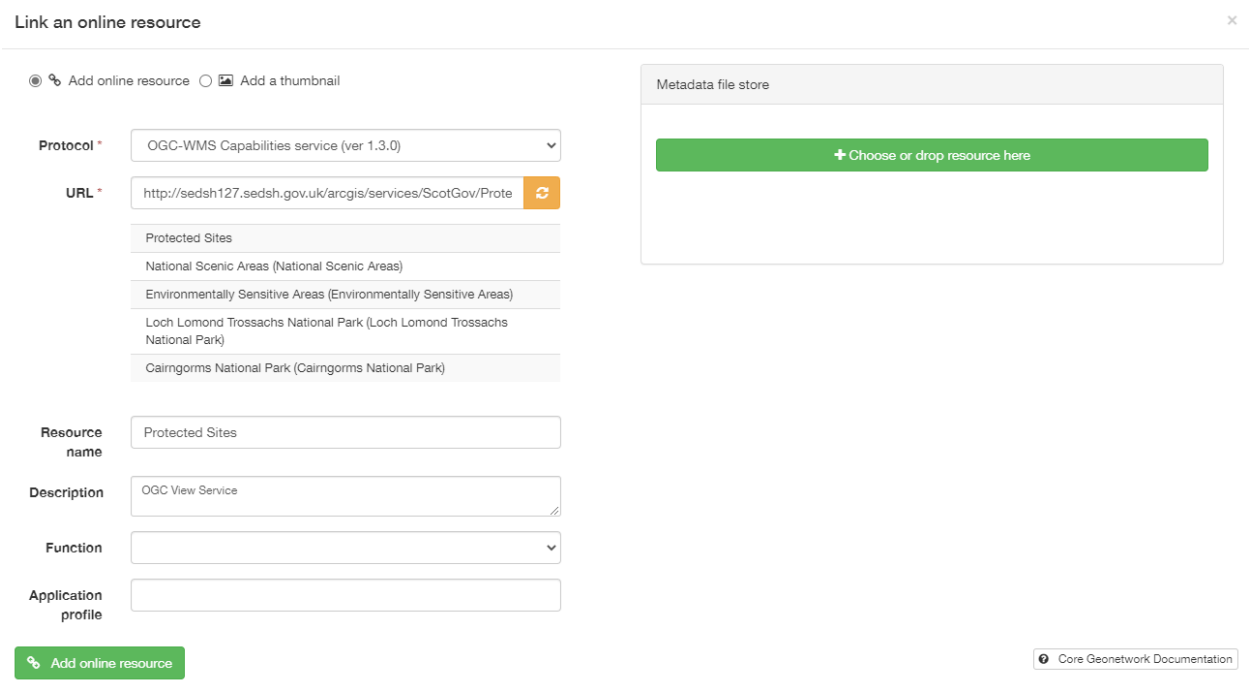


Figure 6.5.3: Adding an online resource to a service record

7.6 Validating metadata

Once all elements for a new record have been completed or changes have been made to an existing record, it should be validated against the UK Gemini standard rules.

To validate a metadata record:

1| In an editing session, click on the Validate button in the header bar.

2| Errors will be highlighted in the validation panel. Click the red thumbs-down icon ( )to see details of the error(s) organised by schematron.

3| Correct errors as necessary and repeat steps 1 and 2 until no errors are returned by the validator.

Note: users can save an invalid record and return at a later date to correct.

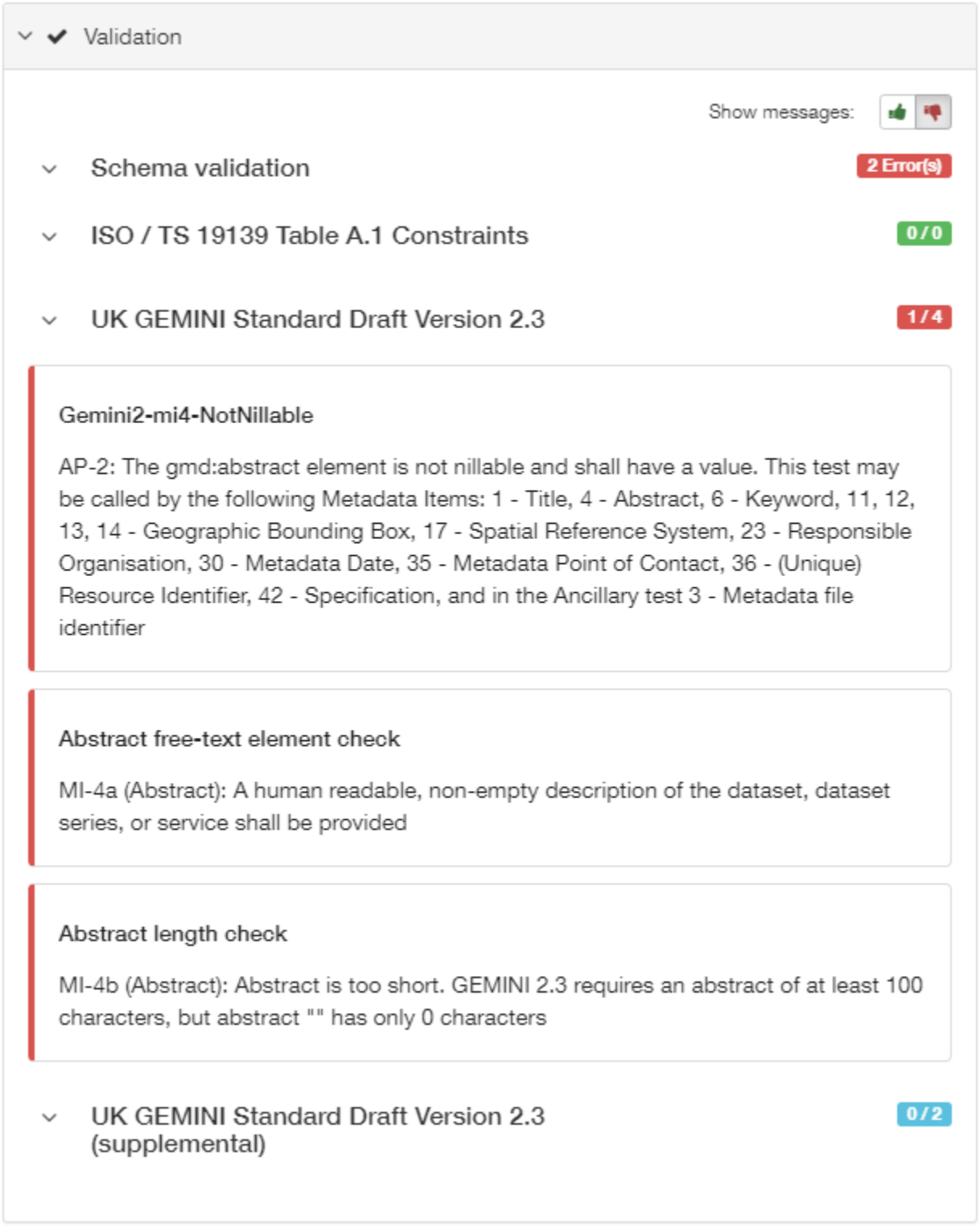


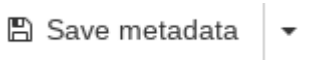
Figure 6.6.1: Validation panel

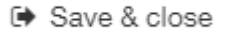
The validation check should be repeated once amendments have been made until no errors are detected. Error descriptions given by the validator are often complex and difficult for the lay user to understand. Consult the Metadata Elements section for guidance on how to complete specific elements.

7.7 Saving and exiting an editing session

As the user works through the editing form, it is recommended that progress be saved periodically as the session will time-out after a period of inactivity.

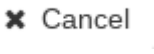
To save a metadata record:

1| Click 

to save the record and continue editing, or click 

to save the record and exit the editing session.

OR

1| Click 

to exit the editing session without saving the record.

Users should note that a saved record will be stored on the server only (not locally). The server is periodically backed up, though it is recommended that users store master copies of their metadata records within their own systems. To export copies of metadata created on the portal, consult the exporting metadata section.

7.8 Publishing metadata

Once a metadata record has been successfully *validated*, it can then be published, making it publicly viewable and available for harvesting by other data portals, such as data.gov.uk.

To publish a metadata record:

1| Click on

in the header.

2| Click the

button. This will enable the **Editor** board, where all records the user has access to will be listed.

3| Locate the metadata record in the list below.

4| Click on the next to the record name to access the Privileges dialog.

5| To make publicly viewable, tick the 'Set all privileges' box next to the row marked 'All' in the group column.

6| Click on

to update the privileges for the record.

Once the record is published, the padlock icon displayed on the Editor board should appear unlocked ( ).

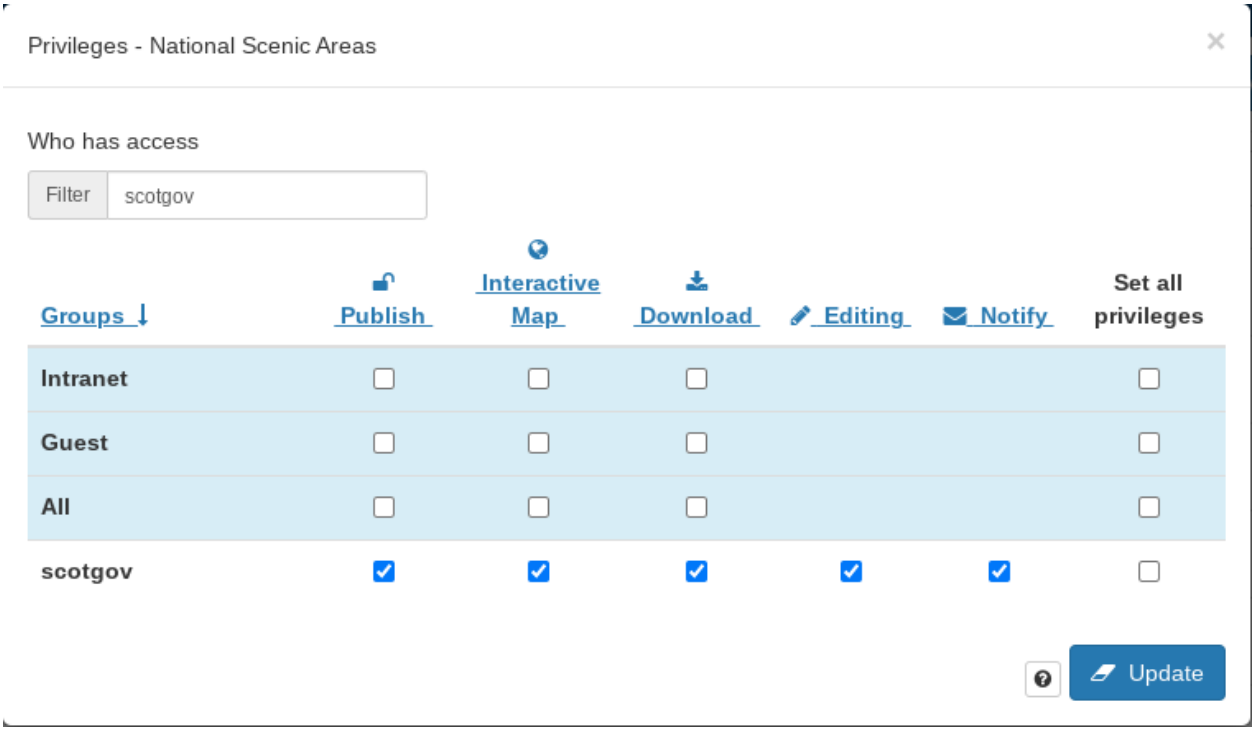
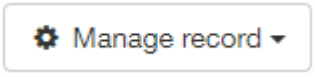


Figure 6.8.1: Publishing via the contribute page

Alternatively, there is a shortcut method to publish a record directly from the record's page on spatialdata.gov.scot:

1| Click on the 

button at the top right of the record view.

2| From the dropdown menu, click on

to publish the record.

Note: the privileges dialog can also be accessed from this dropdown menu.

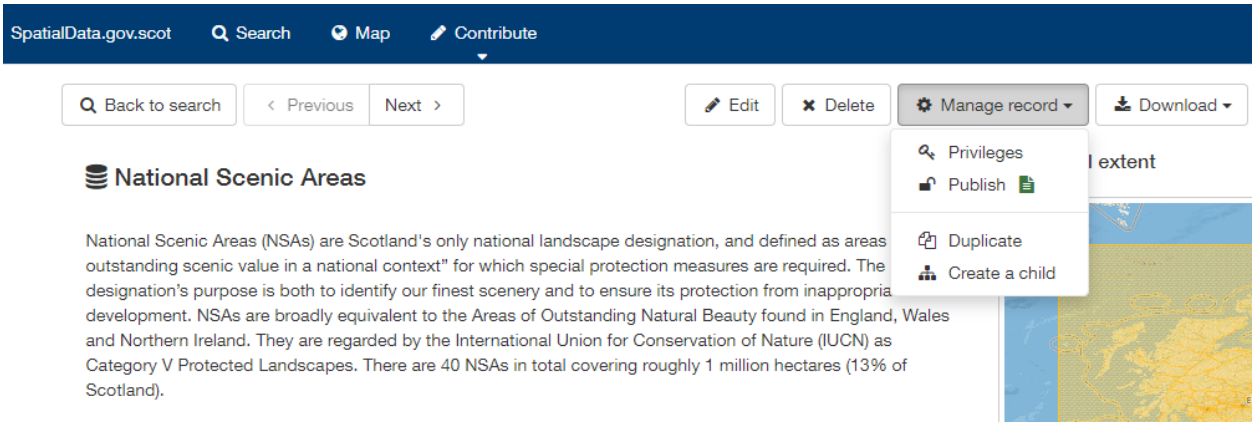


Figure 6.8.2: Publishing via record view

7.9 Batch editing

Administrators will have the privileges to perform batch editing on records. See the Administrator Guidance for more information.

7.10 Deleting metadata

Users with the appropriate privileges will be able to edit or delete records from the portal.

To delete a metadata record:

1| Click on Contribute in the header.

2| Click the Editor board button. This will enable the **Editor** board, where all records the user has access to will be listed.

3| Locate the metadata record in the list below.

4| Click on the ✖ in the row for the record.

5| A confirmation prompt will be displayed. Click 'OK' to confirm the deletion.

Note: the record may still appear in the list until the page is refreshed.

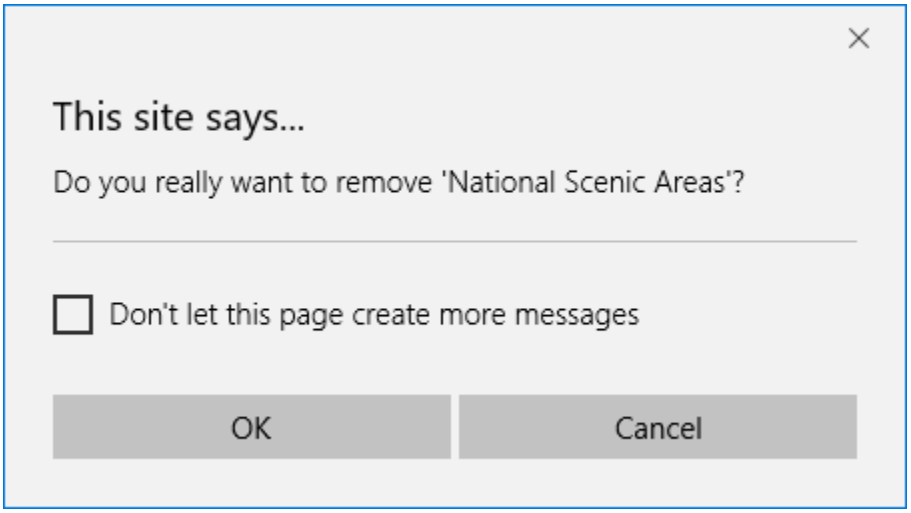


Figure 6.10.1: Confirmation requested to delete a metadata record

Alternatively, the user can delete a record directly from the record's page by clicking the ✖ Delete button.

Note: A confirmation prompt will be displayed. Click 'OK' to confirm the deletion.

Users should note that when deleting a record that had previously been published, that record will not be deleted from other portals which may have harvested the record, such as data.gov.uk. Users should contact SSDI.Metadata@gov.scot to have records deleted from data.gov.uk.

CHAPTER

EIGHT

METADATA ELEMENTS

This section provides guidance with respect to each of the UK Gemini elements. Section headings refer to the label present in the editing form of spatialdata.gov.scot, however, UK Gemini and INSPIRE equivalents are also provided. Links to full element guidance from the AGI are given, which includes information on known common errors. Images are provided showing example entries for each of the elements.

Users may also wish to consult the full UK Gemini 2.3 specification.

8.1 Defining INSPIRE compliance

To define within the metadata if a dataset is compliant with INSPIRE, users should ensure the **Keyword** section is completed. If the dataset is covered by INSPIRE (e.g. parts of it are within the Scope of an INSPIRE Annex data specification), then the **first keyword** should be from the GEMET INSPIRE themes keyword list.

If another controlled vocabulary is used as the first keyword, such as the Integrated Public Sector Vocabulary (IPSV), then the dataset is not covered by INSPIRE. That said, the dataset and service metadata will still be required to comply with the operation and service commitments, as set out in the Registered user obligations section.

8.2 Abstract

Gemini
Abstract

INSPIRE
Resource abstract

ISO19115
MD_Identification.abstract

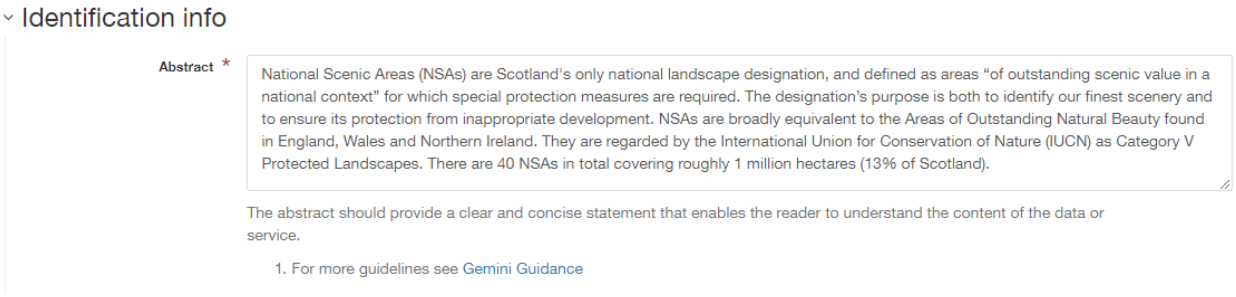
Obligation
Mandatory

occurrence
One

Definition
A brief narrative summary of the data resource.

Guidance
Provide a clear and concise statement of the content of the dataset and its purpose (i.e. the 'what' and 'why' aspect of the dataset). General background information should not be included, and unexplained abbreviations and jargon should be avoided. The abstract description should be understood by non-experts.

Note: with Gemini 2.3 there is now a requirement for the abstract to be at least 100 characters long, and to be different from the title element. Validation will display an error if these conditions are not met.



8.3 Additional information

Gemini
Additional information

INSPIRE
supplemental information

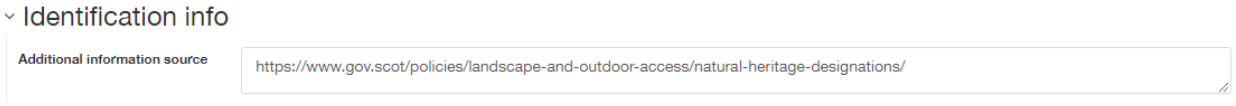
ISO19115
MD_Identification > MD_DataIdentification.supplementalInformation

Obligation
Optional

occurrence
One

Definition
Other descriptive information about the data resource.

Guidance
Record relevant information that does not clearly belong in any other element. A URL may be entered to reference other documents. Do **not** use it to describe how to access the resource (this should be in the *resource locator* element), or for any restrictions on access or use (use the *limitations on public access* and *use constraints* elements). If this element is not visible in the editor, switch to advanced editing view, and the Identification info tab, and use the "Additional information" button at the bottom of the page.



8.4 Alternative title

Gemini
Alternative title

INSPIRE
n/a

ISO19115
MD_DataIdentification.citation > CI_Citation.alternateTitle

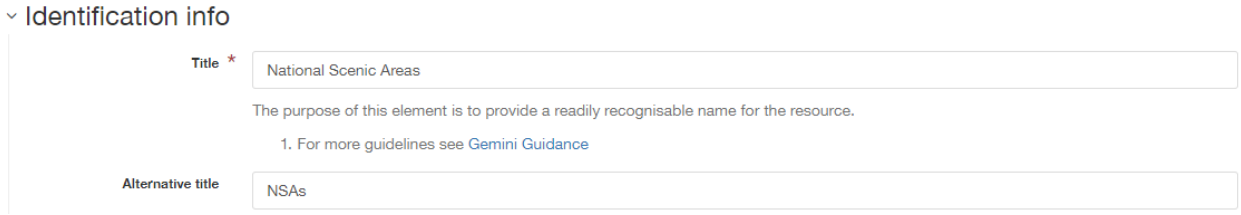
Obligation
Optional

occurrence
Many

Definition
Any short name, other name, acronym or alternative language title by which the data resource is known.

Guidance
This element should be used to record alternative titles by which the data resource is known, such as historical names, commonly used abbreviations and acronyms. It can also be helpful to include title with spatial or temporal coverage if applicable. Entries should remain short and concise.

If the element is not visible in the default view of the editing form, it can be added by switching to advanced view and clicking the + button.



8.5 Character encoding

Gemini
Character encoding

INSPIRE
Character encoding (metadata/2.0/req/isdss/character-encoding)

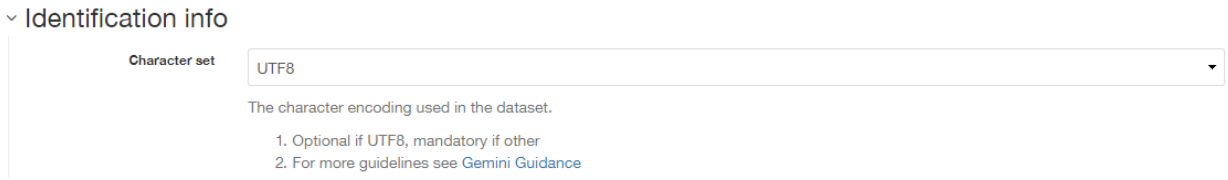
ISO19115
MD_DataIdentification.characterSet

Obligation
Conditional (mandatory if not UTF-8)

occurence
Many

Definition
The character encoding used in the dataset.

Guidance
This element enables data in non-standard character encodings to be handled. By default the encoding is set to UTF8, but other options are available using the dropdown list. The majority of users will not need to change this element.



8.6 Data format

Gemini
Data format

INSPIRE
Data encoding

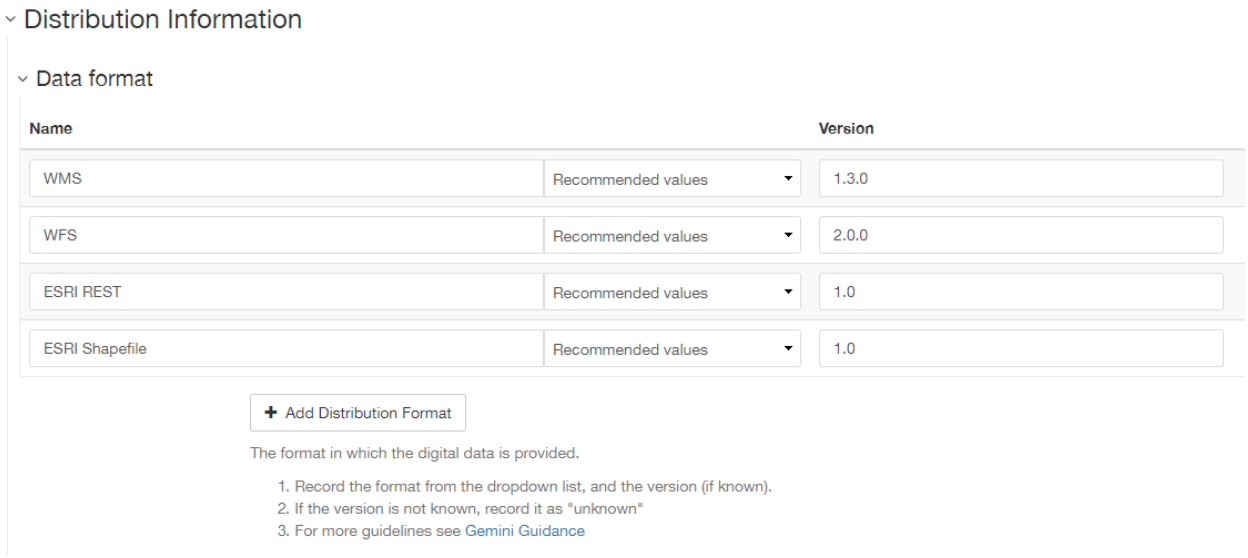
ISO19115
MD_Distribution.distributionFormat > MD_Format

Obligation
Mandatory

occurrence
Many

Definition
The format(s) in which the digital data is available.

Guidance
The name of the format and the version can be selected from common options listed in the drop down menu. Otherwise, entries should be recognised formats for data transfer, either standard or proprietary. If the data is not transferable (e.g. view only), then this should be stated. Recommended best practice is to select a value from a controlled vocabulary, such as PRONOM.



8.7 Data quality

Gemini
Data quality

INSPIRE
Topological consistency. Other types are specified in the data specifications

ISO19115
DQ_DataQuality.report->DQ_Element

Obligation
Conditional. Consult Gemini Guidance.

occurrence
Many

Definition
Quantitative aspects of data quality. To allow quantitative description of the completeness, consistency, accuracy, and correctness of the data

Guidance
This element comprises two sub-elements:

1| *Scope* - the specific data to which the data quality information applies.

2| *Conformity* - the product specification being assessed against (e.g. conformance to INSPIRE).

At least one data quality element must be scoped to the entire data set or series that the metadata refers to. Other quality measures, for example relating to specific feature types may be provided in addition. To add additional Data Quality elements, switch to advanced view and click the button at the base of the page.

8.8 Data quality - Conformity

Gemini
Conformity

INSPIRE
Conformity - degree

ISO19115
DQ_DataQuality > DQ_Element.result > DQ_ConformanceResult

Obligation
Mandatory

occurrence
Many

Definition
A sub-element of *Data quality*, this is the degree of conformity with the product specification or user requirement against which the data is being evaluated (i.e. degree of conformity to INSPIRE).

Guidance
At least one conformity statement shall be to an INSPIRE specification, even if to simply say that the data set is not conformant or not tested. Template snippets for INSPIRE Spatial data sets, Network

services and Spatial data services have been provided. Use the *Search for a quality report...* search box at the bottom of the element to choose the appropriate one.

To record that a data set or service has not been evaluated, for the Degree choose '**Not evaluated**'. Otherwise choose '**Conformant**' or '**Not conformant**' as appropriate.

To record conformance against an additional report, switch to the Advanced editing view, change to the Quality tab and add a new report using the plus button within the appropriate *Data quality* element.

8.9 Data quality - Quality scope

Gemini
Quality Scope

INSPIRE
metadata/2.0/req/datasets-and-series/one-data-quality-element

ISO19115
DQ_DataQuality.scope

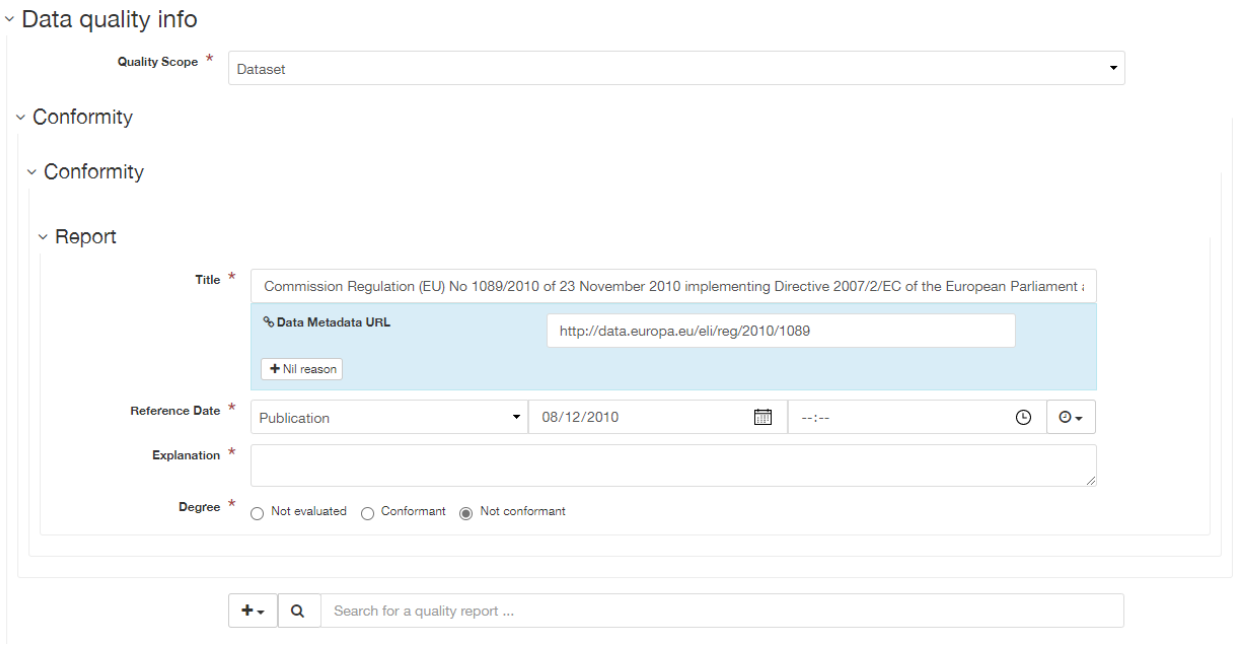
Obligation
Mandatory

occurrence
Many

Definition
A sub-element of *Data quality*, this is specific scope to which the data quality assessment applies.

Guidance
At least one *Data quality* element scoped to the entire dataset or series to which the metadata record refers. For a dataset, set quality scope to '**dataset**', for a dataset series, set quality scope to '**series**'.

If using a *Data quality* element to describe something other than the whole dataset or series, then provide additional data quality elements with their scope set appropriately. Switch to the Advanced editing view, change to the Quality tab, and Data Quality info element using the plus button at the base of the page. Set the quality scope to the appropriate level using the dropdown list.



8.10 Dataset language

Gemini
Dataset language

INSPIRE
Resource language

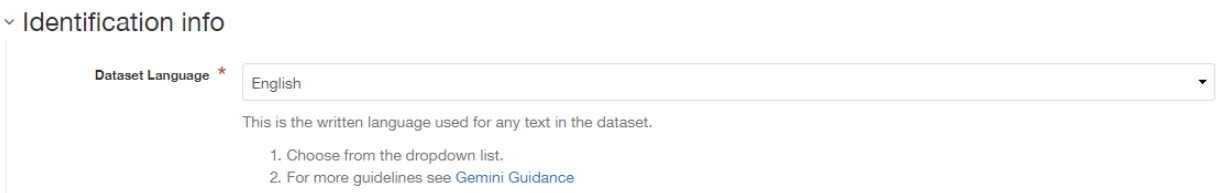
ISO19115
MD_DataIdentification.language

Obligation
Conditional

occurrence
Many

Definition
The language used within the dataset (assuming the data resource contains text/written information, e.g. in attribute tables).

Guidance
Select a language from the drop down menu listing entries from the ISO 639-2 code list. For INSPIRE compliance, this has to be an official language of the European Community, of which English (eng) is the only one in common use across the UK (and is the default). For non-INSPIRE metadata records, it can be any ISO 639-2 three letter code, of which the relevant entries for the UK are English (eng), Welsh (cym), Gaelic (Irish) (gle), Gaelic (Scottish) (gla), Cornish (cor), Ulster Scots (sco).



8.11 Dataset reference date

Gemini
Dataset reference date

INSPIRE
Date of publication

ISO19115
MD_Identification.citation > CI_Citation.date

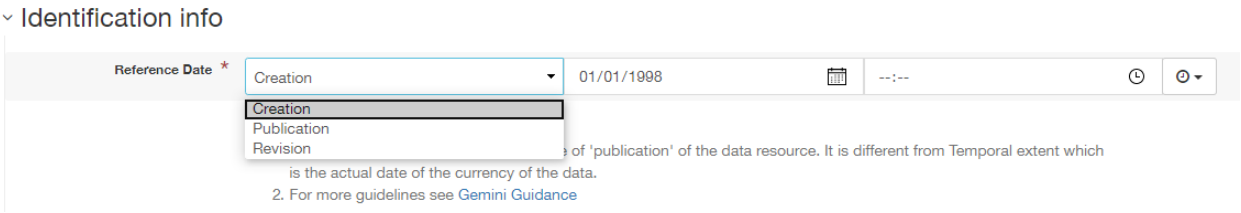
Obligation
Mandatory

occurrence
Many

Definition
Reference date for the data resource, indicating the date of publication, creation and/or last revision. Note that for services, this date relates to the creation, publication, and/or revision of the service, not the dataset(s) within it.)

Guidance
This element is a notional date of publication of the data resource. It is different from the *temporal extent*, which is the date of currency of the resource. Multiple dataset reference dates can be defined, but there must only be one of type *creation* and only one of type *revision*.

Dates may be to any degree of precision, from year (YYYY) to full date and time. The extended date format (YYYY-MM-DD) should be used, where YYYY is the year, MM the month, and DD the day. If required, time (HH:MM:SS, where HH is the hour, MM the minute, and SS the second) may be added, with 'T' separating the two parts.



8.12 Extent - Geographic bounding box

Gemini
Bounding box

INSPIRE
Geographic bounding box

ISO19115
MD_DataIdentification.extent > EX_Extent > EX_GeographicExtent > EX_GeographicBoundingBox

Obligation
Mandatory

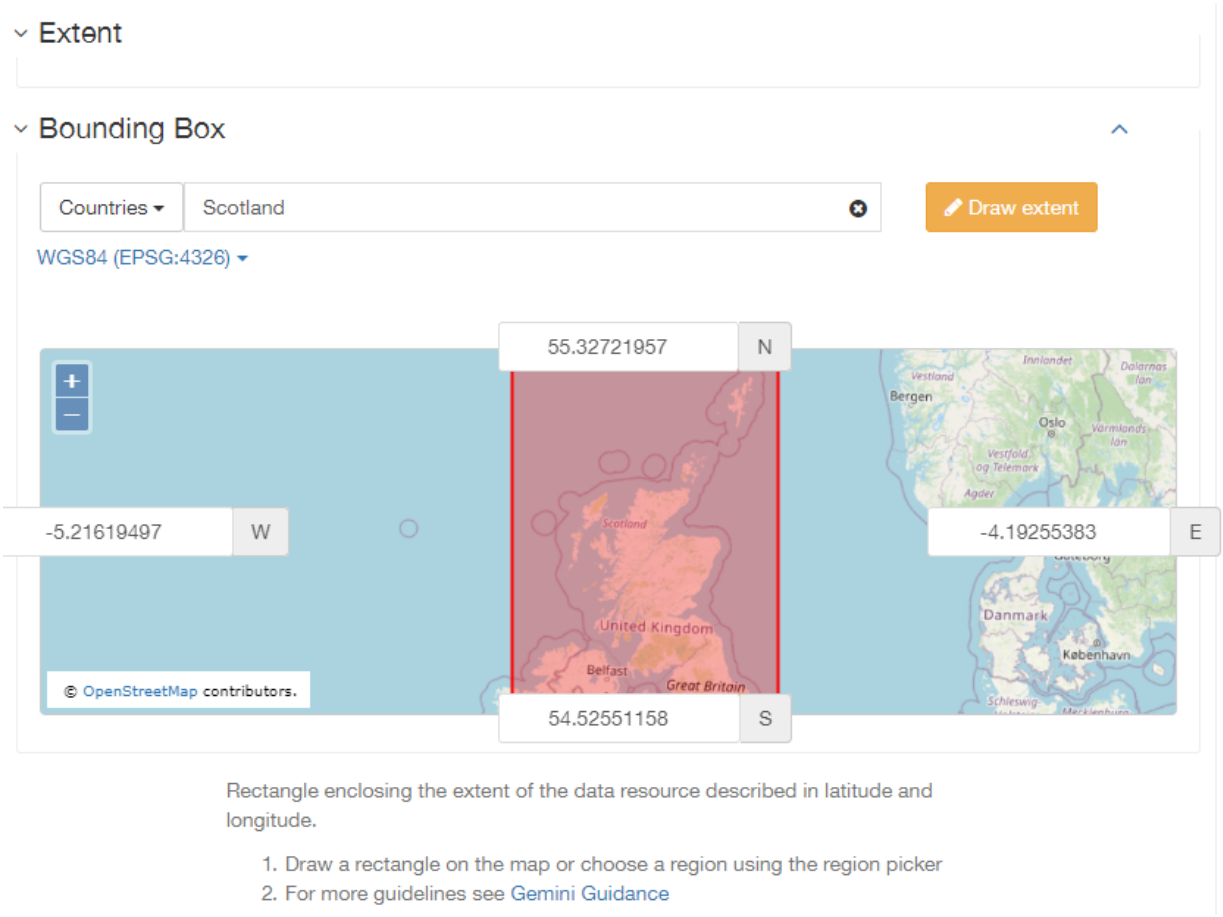
occurrence
Many

Definition

Rectangle enclosing the extent of the data resource described in latitude and longitude, to enable the resource to be located geographically. It has four sub-elements: *west bounding longitude*, *east bounding longitude*, *south bounding latitude*, and *north bounding latitude*.

Guidance

A pre-defined extent can be chosen from the drop down menu, or bounding coordinates can be manually entered in the corresponding boxes. The west bounding longitude should be less than the east bounding longitude, and the north bounding latitude must be greater than the south.



8.13 Extent - Geographic description

Gemini

Extent

INSPIRE

n/a

ISO19115

MD_DataIdentification.extent > EX_Extent > EX_GeographicExtent > EX_GeographicDescription.geographicIdentifier

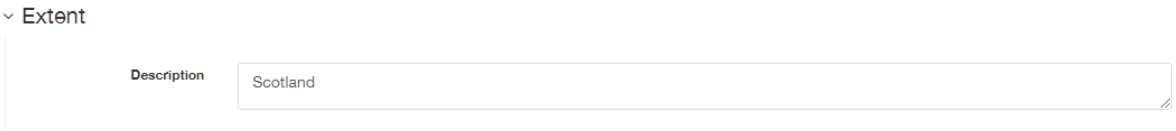
Obligation

Optional

occurrence
Many

Definition
The geographical extent of the data resource relative to an administrative hierarchy. Note that it is the coverage of the data resource, not the individual objects in the data resource. Thus if the data resource was national parks in Scotland, the extent would be 'Scotland', even though many parts of Scotland do not have National Parks. Sub-elements of the geographic description are the *code* identifying the extent and the *designating authority* (optional).

Guidance
Enter a pre-defined extent of country or Local Authority using one of the controlled lists available in the drop down above the bounding box element (e.g. Geonames). Note that this element may also be populated using a linked data register entry, for example http://statistics.gov.scot/id/statistical-geography/S92000003.



8.14 Extent - Temporal extent

Gemini
Temporal extent

INSPIRE
Temporal extent

ISO19115
EX_Extent > EX_TemporalExtent.extent

Obligation
Mandatory (dataset), Conditional (service)

occurrence
Many

Definition
This is the date(s) that describes the time period covered by the content of the dataset. It may refer to (a) the period of collection of the data or (b) the date at which it is deemed to be current. Temporal extent is the date of the validity of the data, and is different from the *dataset reference date* (i.e. publication).

Guidance

Enter a Begin date and/or End date as required. Click on to activate the calendar selector. To add additional temporal extents, use the advanced editor view.

2| Scroll to the extent section (identification tab) and click the button next to the **Temporal element** label.

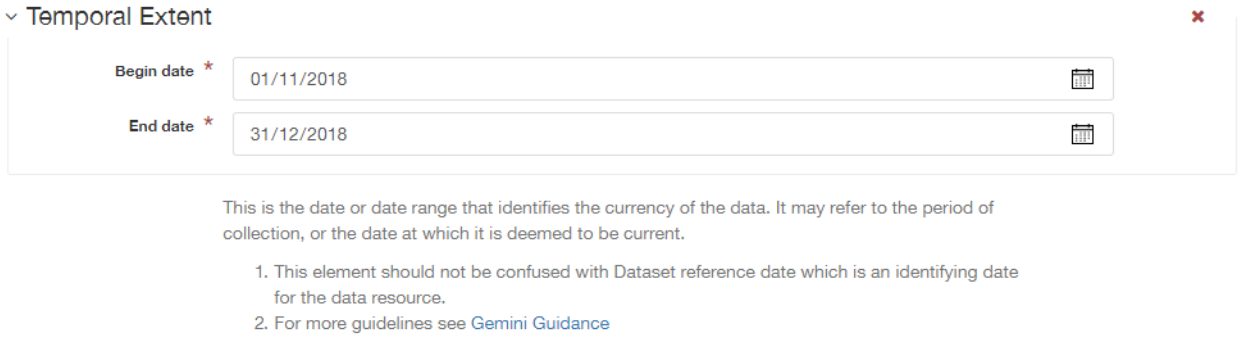
3| From the dropdown menu, select **Temporal Extent**. This will present a further button labeled **Extent**.

4| From the dropdown menu, select the extent type from either time edge, instant, node or period.

Note: if the temporal extent is composed of a begining and an end date, select time period. If it is a single date (e.g. census day) choose time instant. The time edge and node options are not often used.

5| If the time period option is chosen, use the buttons to add begining and end dates.

Enter a date, or two dates defining the duration of the period, as defined by BS ISO 8601. Dates may be to any degree of precision, from year (YYYY) to full date and time. The extended date format (YYYY-MM-DD) should be used, where YYYY is the year, MM the month, and DD the day. If required, time (HH:MM:SS, where HH is the hour, MM the minute, and SS the second) may be added, with 'T' separating the two parts. Periods are recorded as {fromdate/todate} (e.g. 2006-04-01/2007-03-31). Either the from date or the to date (but not both) of the time period may be left blank to indicate uncertainty.



8.15 Extent - Vertical extent

Gemini
Vertical extent information

INSPIRE
n/a

ISO19115
MD_DataIdentification.extent > EX_Extent > EX_VerticalExtent

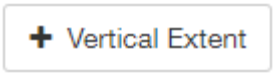
Obligation
Optional

occurrence
Many

Definition
Describes the vertical domain (height range) of the data resource. The element is composed of the **minimum value**, **maximum value** and the **vertical coordinate reference system** (recorded as a name or code from a recognised thesaurus, i.e. EPSG Geodetic Parameter Registry).

Guidance
This element should be completed only where the vertical extent is relevant (e.g. geology, mining, etc.). If it is relevant, then all sub-elements are mandatory.

To add the vertical extent:

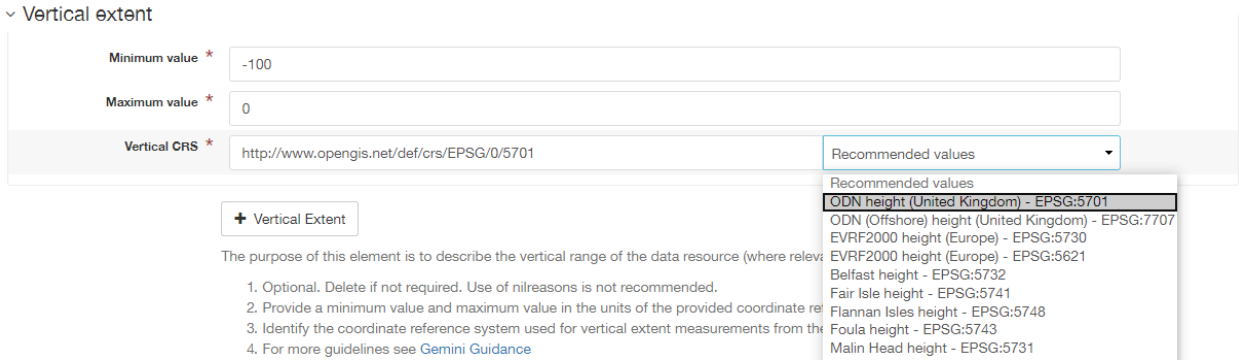
1| In default (simple) view, scroll to the extent element and click 

.

2| Enter a minimum value in metres.

3| Enter a maximum value in metres.

4| Choose the appropriate vertical CRS from the recommended values dropdown list.



8.16 File identifier

Gemini
File identifier

INSPIRE
metadata/2.0/rec/common/fileIdentifier

ISO19115
MD_Metadata.fileIdentifier

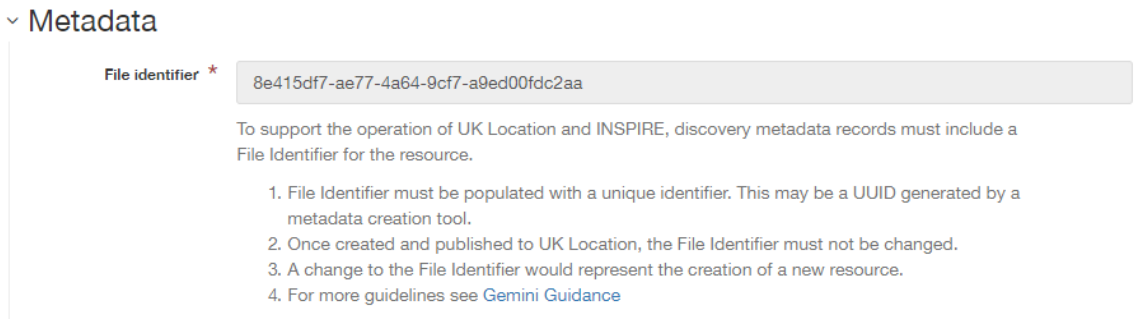
Obligation
Mandatory

occurrence
One

Definition
Unique identifier for this metadata file.

Guidance
To support the operation of UK Location and INSPIRE, discovery metadata records must include a File Identifier for the resource. This will be auto-generated by a metadata creation tool (e.g. the metadata portal itself or an external metadata editor) and once created cannot be changed.

File identifier should not be confused with the UK GEMINI2 metadata item *Resource identifier*, which identifies the data resource being described.



8.17 Hierarchy level name

Gemini
Hierarchy level name

INSPIRE
Hierarchy level

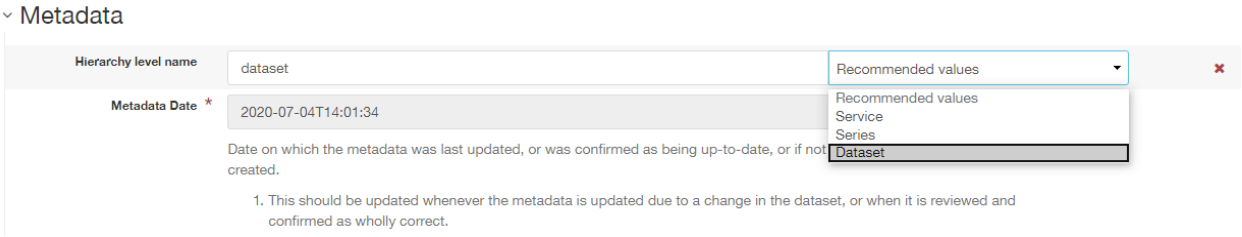
ISO19115
MD_Metadata.hierarchyLevelName

Obligation
Mandatory for series and services, optional for datasets

occurrence
One

Definition
The name of the hierarchy level for which the metadata is provided (eg dataset, series, service).

Guidance
Set to '**service**', '**series**', or '**dataset**' as appropriate. Note that in UK Gemini this element is conditional for datasets.



8.18 Keyword

Gemini
Keyword

INSPIRE
Keyword

ISO19115
MD_Identification.descriptiveKeywords > MD_Keywords

Obligation
Mandatory

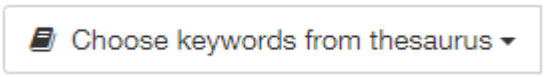
occurrence
Many

Definition
Terms covering the subject of the data resource that are more specific than those entered under *topic category*. Ideally, these will be standardised keywords originating from a controlled vocabulary, so that resources can be identified in any search.

Guidance
It is recommended that keyword values be taken from a standardised subject vocabularies, such as General Environmental Multi-Lingual Thesaurus (GEMET) or the Integrated Public Sector Vocabulary (IPSV), and the formal citation provided (including the date, version and any amendments where appropriate). This will enable other users to perform more efficient searches and eliminate resources that are of no interest more easily.

If the dataset is covered under INSPIRE, then the **first** keyword should be from the General Environmental Multi-Lingual Thesaurus (GEMET) - INSPIRE Spatial Data Themes list. Service records must include a keyword from the INSPIRE Classification of spatial data services code list.

To add new keywords from a controlled vocabulary to the editing form:

1| Click the 

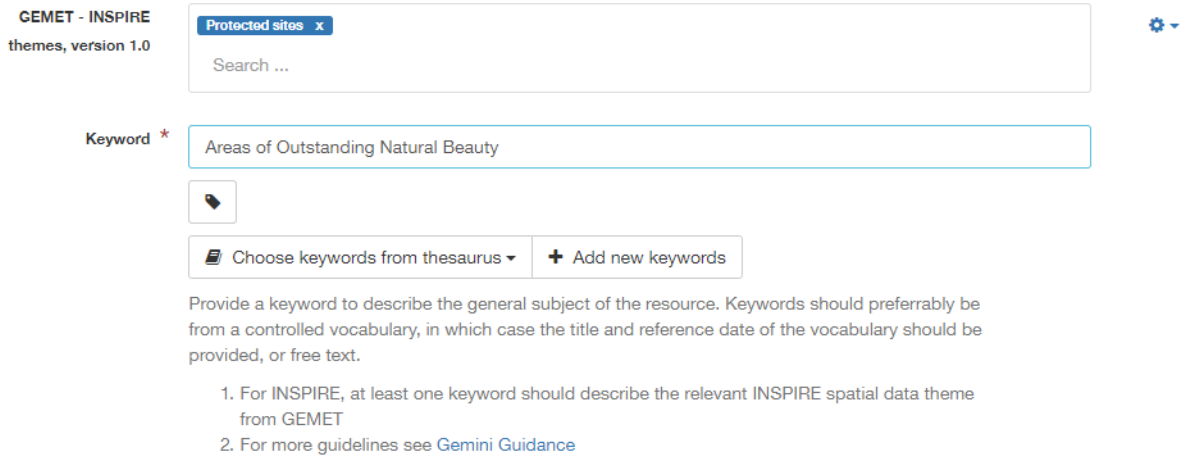
button below the keywords element.

2| Select the desired thesaurus (e.g. GEMET - INSPIRE themes, version 1.0). This will add a search box for the thesaurus.

3| Click to select the relevant keyword. The citiation for the originating vocabulary will be pre-populated.

Note: alternately, free text keywords can be added by clicking the

button.



8.19 Limitations on public access

Gemini
Limitations on public access

INSPIRE
Limitations on public access

ISO19115
MD_Identification.resourceConstraints > MD_LegalConstraints.accessConstraints & otherConstraints

Obligation
Mandatory

occurrence
Many

Definition
Restrictions imposed on **access** to the data resource for security and other reasons (i.e. who can see the data).

Guidance
Limitations on public access is different from the *use constraints* element, which describes limitations on using the data, such as fees or licencing restrictions, rather than the access to it. A data resource can be openly accessible (which all INSPIRE data should be), but have restrictions on its use such as licensing, fees, or usage limitations.

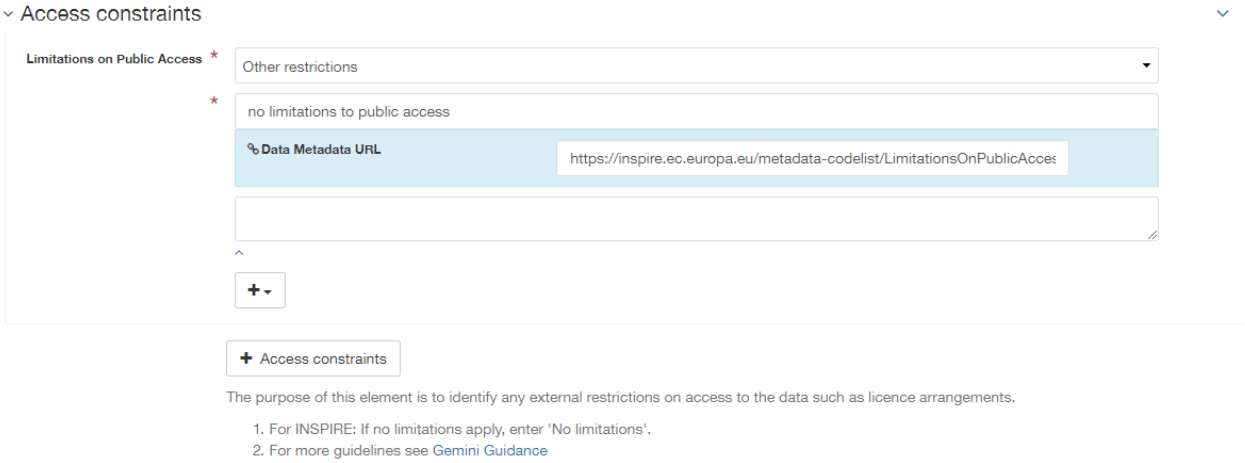
For INSPIRE purposes, the *Limitations on public access* dropdown box must be set to '**other restrictions**'. The anchor element below must then be populated with an appropriate label from the INSPIRE code list for Limitations on public access. Change the anchor label to the appropriate entry from the code list, and ensure the URL points to the corresponding code list URI.

Article 13 of the Directive contains a list of cases where limitations on public access can be set. With regards to providing the metadata for the datasets and services through discovery services, the limitations on public access can be set on the base of reasons of international relations, public security or national defence. Concerning providing View, Download or Transformation Services, or e-commerce services, limitations on public access can be set on the base of the following reasons:

- the confidentiality of the proceedings of public authorities, where such confidentiality is provided for by law;
- international relations, public security or national defence;
- the course of justice, the ability of any person to receive a fair trial or the ability of a public authority to conduct an enquiry of a criminal or disciplinary nature;
- the confidentiality of commercial or industrial information, where such confidentiality is provided for by national or Community law to protect a legitimate economic interest, including the public interest in maintaining statistical confidentiality and tax secrecy;
- intellectual property rights;
- the confidentiality of personal data and/or files relating to a natural person where that person has not consented to the disclosure of the information to the public, where such confidentiality is provided for by national or Community law;
- the interests or protection of any person who supplied the information requested on a voluntary basis without being under, or capable of being put under, a legal obligation to do so, unless that person has consented to the release of the information concerned;

- the protection of the environment to which such information relates, such as the location of rare species.

This element shall **only** include information regarding access to the resource (not the use of the data, which is documented under the *Use constraints* section). When Member States limit public access to spatial data sets and spatial data services under Article 13 of Directive 2007/2/EC, this metadata element shall provide information on the limitations and the reasons for them. If there are no limitations on public access, this metadata element shall indicate that fact.



8.20 Lineage

Gemini
Lineage

INSPIRE
Lineage

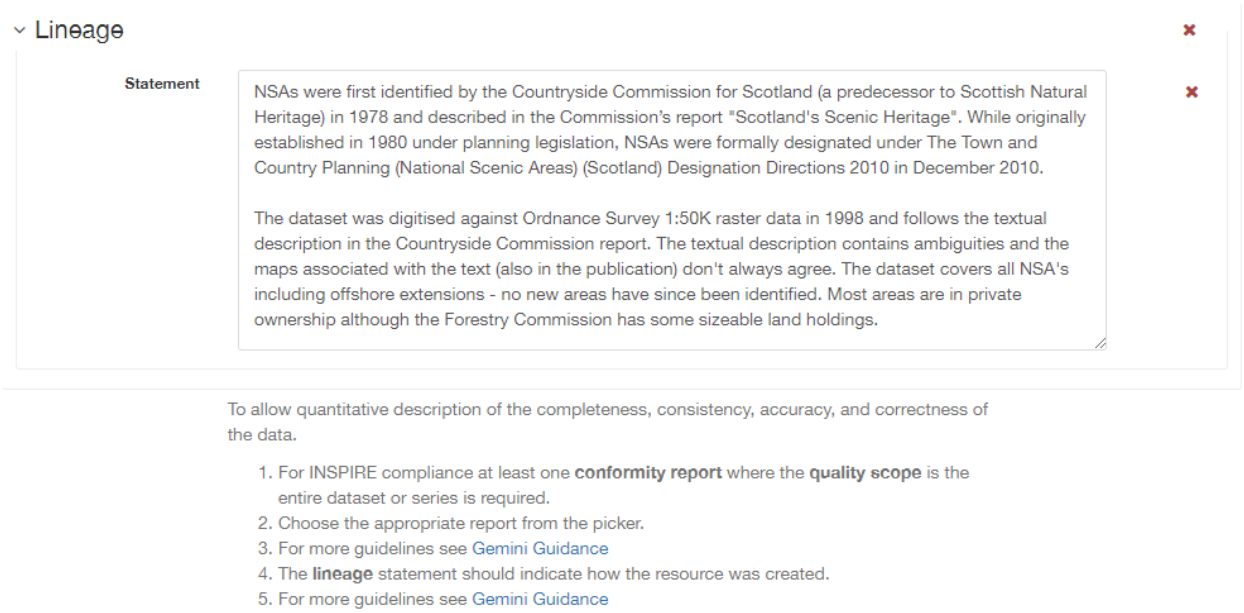
ISO19115
DQ_DataQuality.lineage > LI_Lineage.statement

Obligation
Mandatory

occurrence
One

Definition
A sub-element of *data quality* that should provide information about the events or source data used in the creation of the data resource. This will be useful in determining whether the data is fit for purpose.

Guidance
The lineage differs from the *abstract* in that it covers 'how' the dataset was created as opposed the 'what' and 'why' of the dataset. A brief technical description should be given noting any sources and processes used. Any procedures or protocol associated with the update of the dataset should also be noted, along with notes on previous updates.



8.21 Maintenance information

Gemini
Maintenance information

INSPIRE
Maintenance information

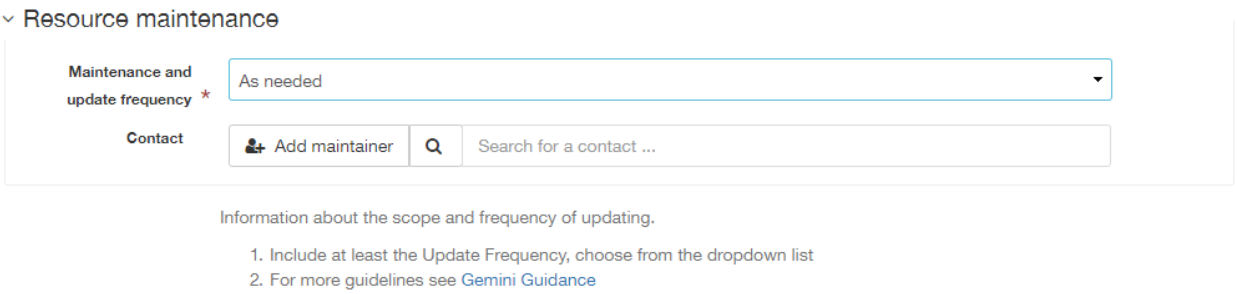
ISO19115
MD_MaintenanceInformation.maintenanceAndUpdateFrequency

Obligation
Optional

occurrence
One

Definition
Information about the scope and frequency of updating. Note that this identifies how often the updated data resource is made available to the user (for instance a data resource may be updated continuously, but released to the user only monthly).

Guidance
Choose the appropriate frequency from the drop down list. If the update cycle is unknown, please choose '**Unknown**' from the list.



8.22 Metadata date stamp

Gemini
Metadata date

INSPIRE
Metadata date

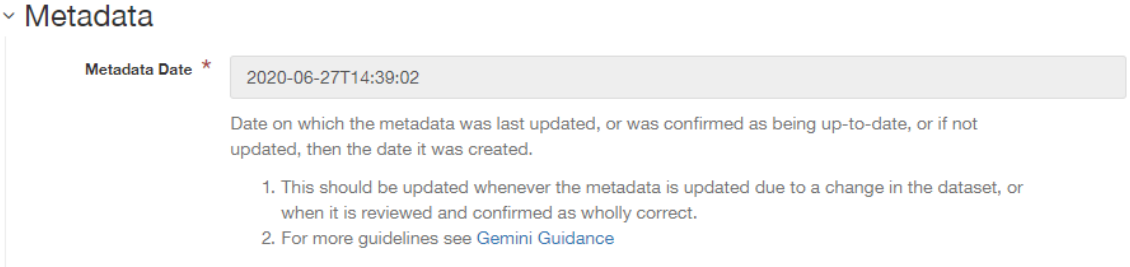
ISO19115
MD_Metadata.dataStamp

Obligation
Mandatory

occurrence
One

Definition
The date on which the metadata was last updated.

Guidance
This element is not editable and is set by the editor when the file is saved. It is used by spatial-data.gov.scot and data.gov.uk to determine if metadata with the same field identifier (UUID) has been changed. A single date is specified in the extended format YYYY-MM-DD, where YYYY is the year, MM is the month and DD is the day.



8.23 Metadata language

Gemini
Metadata language

INSPIRE
Metadata language

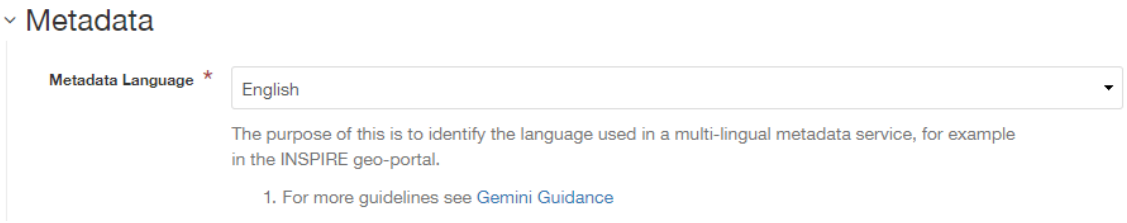
ISO19115
MD_Metadata.language

Obligation
Mandatory

occurrence
One

Definition
The language used to document the metadata. The purpose of this element is to identify the language used in a multi-lingual metadata service, for example in the INSPIRE geo-portal.

Guidance
Selected a language from the drop down menu listing entries from the ISO 639-2 code list. For INSPIRE compliance, this has to be an official language of the European Community, of which English (eng) is the only one in common use across the UK (and is the default in the SSDI). For non-INSPIRE metadata records, it can be any ISO 639-2 three letter code, of which the relevant entries for the UK are English (eng), Welsh (cym), Gaelic (Irish) (gle), Gaelic (Scottish) (gla), Cornish (cor), Ulster Scots (sco).



8.24 Metadata point of contact

Gemini
Metadata point of contact

INSPIRE
Metadata point of contact

ISO19115
MD_Metadata.contact > CI_ResponsibleParty

Obligation
Mandatory

occurrence
Many

Definition
This element records the details of the organisation(s) responsible for the creation and maintenance

of the metadata record. The structure of this element is the same as the *Point of contact* element. There are eight sub-elements:

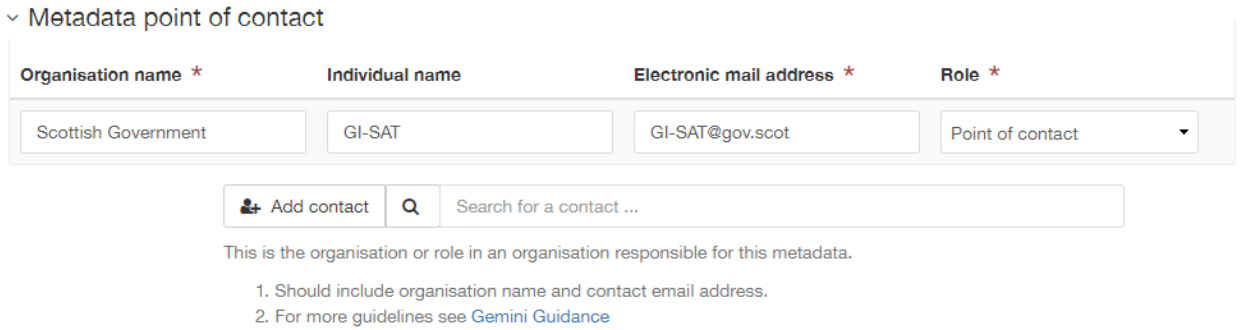
- Organisation name
- Position name (i.e. job role or position of the responsible person or business area)
- Voice (i.e. telephone number)
- Facsimile (i.e. facsimile number)
- Address (i.e. postal address as defined by Royal Mail)
- Electronic mail address (i.e. email address)
- Resource locator (i.e. web address of the organisation)
- Role (of the responsible party with respect to the metadata)

Guidance

Of the eight sub-elements, only the **organisation name**, **email address** and **role** are mandatory. All other sub-elements are optional. With regards to the *organisation name*, this should be provided in full without abbreviations. In terms of the *role*, for INSPIRE purposes this must be set to *point of contact*.

For *position name*, a general job title (e.g. Data Manager) should be identified rather than individuals which are subject to change without notice and difficult to maintain. Likewise, email addresses should be provided for branch or team (i.e. shared) mailboxes where possible rather than for individuals.

If the user has stored contact details in a directory entry on the portal, details can be auto-populated by searching for the contact in the search box below the element.



8.25 Metadata standard name

Gemini

Metadata standard name

INSPIRE

N/A

ISO19115

MD_Metadata.metadataStandardName

Obligation

Optional in GEMINI but required in spatialdata.gov.scot

occurence

One

Definition
Name of the metadata standard or profile used, cited with a reference to the appropriate register entry.

Guidance
This element is required in spatialdata.gov.scot and must be set to UK GEMINI when importing metadata records into the portal. For records created within the portal from templates, this element will be automatically filled in, and will not be editable in the default editing view.

8.26 Metadata standard version

Gemini
Metadata standard version

INSPIRE
N/A

ISO19115
MD_Metadata.metadataStandardVersion

Obligation
Optional in GEMINI but required in spatialdata.gov.scot

occurence
One

Definition
Version of the metadata standard (profile) used.

Guidance
This element is required in spatialdata.gov.scot and must be set to **2.3** when importing metadata records into the portal. For records created within the portal from templates, this element will be automatically filled in, and will not be editable in the default editing view.

8.27 Parent identifier

Gemini
Parent identifier

INSPIRE
N/A

ISO19115
MD_parentidentifier.scope

Obligation
Optional

occurrence
One

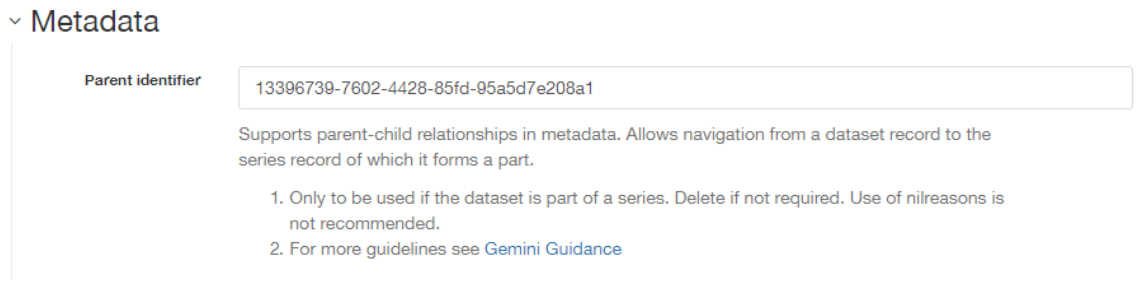
Definition

File identifier of the metadata that is a parent to this child metadata. It supports parent-child relationships in metadata and allows navigation from a dataset record to the series record of which it forms a part.

Guidance

Only to be used if the dataset is part of a series. To add a parent identifier, click

and add the Unique Identifier for the parent record.



8.28 Resource identifier

Gemini

Resource identifier

INSPIRE

Unique resource identifier

ISO19115

MD_DataIdentification.citation > CI_Citation.identifier

Obligation

Mandatory (datasets), Optional (services)

occurrence

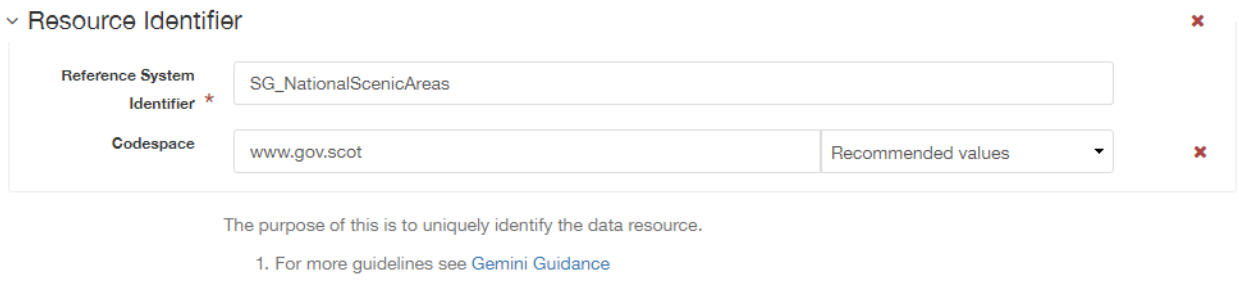
Many

Definition

A value uniquely identifying the data resource within your organisation (i.e. how your organisation references the dataset).

Guidance

The *Code* element is mandatory, and should be a recognisable identifier within the context of your organisation (i.e. a unique code of numbers, letters or combination of referring to a single dataset). If it is not guaranteed to be unique across the UK and the wider EU (INSPIRE), then the *Codespace* sub-element must be specified; this should be the internet domain of the data provider/owner.



8.29 Resource locator

Gemini
Resource locator

INSPIRE
Resource locator

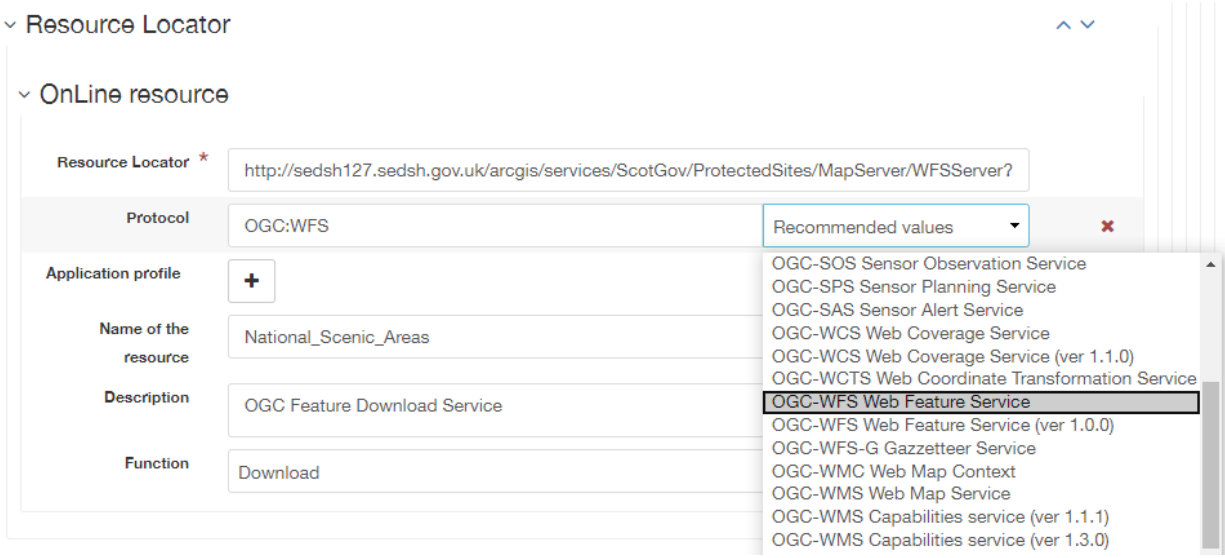
ISO19115
MD_Distribution > MD_DigitalTransferOptions.online > CI_OnlineResource.linkage

Obligation
Conditional

occurrence
Many

Definition
Location (address) for on-line access to the resource using a Uniform Resource Locator (URL). This element should point to where the dataset may be accessed, and may be different from where it may be ordered online (which should be included in the web address of the distributor).

Guidance
This element should primarily be used to enter URLs for web services (i.e. WMS, WFS, etc.), however, links to web pages offering more information or other services (e.g. interactive mapping applications) can also be added. To add an online resource, follow the instructions provided in the Associated resources section. Once an online resource has been added, it can be edited as normal in the editing form. Note that for web services to be displayed in the interactive map, the **protocol**, **layer name** and **description** must be entered. The layer name **must** match that as defined in the GetCapabilities request of the service.



8.30 Resource type

Gemini
Resource type

INSPIRE
Resource type

ISO19115
MD_Metadata.hierarchyLevel

Obligation
Mandatory

occurrence
One

Definition
Scope to which the metadata applies (i.e. dataset, series, service).

Guidance
Identify whether resource is a dataset or a series (collection of datasets with a common specification). For metadata created on spatialdata.gov.scot, this element is set by the choice of template and should not be changed.

8.31 Responsible organisation

Gemini
Responsible organisation

INSPIRE
Responsible party

ISO19115
MD_Identification.pointOfContact

Obligation
Mandatory

occurrence
Many

Definition
This element records the details of the organisation(s) responsible for the creation, maintenance and distribution of the data resource. The structure of this element is the same as the *Metadata contact* element. There are eight sub-elements:

- Organisation name
- Position name (i.e. job role or position of the responsible person)
- Voice (i.e. telephone number)

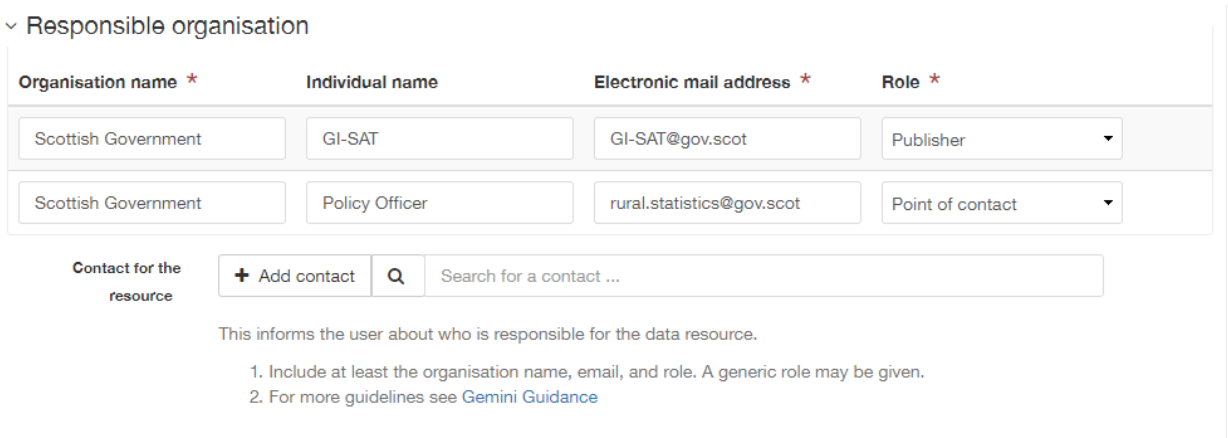
- Facsimile (i.e. facsimile number)
- Address (i.e. postal address as defined by Royal Mail)
- Electronic mail address (i.e. email address)
- Resource locator (i.e. web address of the organisation)
- Role (of the responsible party with respect to the resource)

Guidance

Of the eight sub-elements, only the **orgnaisation name**, **email address** and **role** are mandatory. All other sub-elements are optional. With regards to the *organisation name*, this should be provided in full without abbreviations. In terms of the *role*, if a responsible party is both the creator, publisher and distributor of the resource then the role should be set to *Publisher*. If the resource was created by a party other than the provider this should also be recorded, using the role value *Originator*.

For *position name*, a general job title (e.g. Data Manager) should be identified rather than individuals which are subject to change without notice and difficult to maintain. Likewise, email addresses should be provided for branch or team (i.e. shared) mailboxes where possible rather than for individuals.

If the user has stored contact details in a directory entry on the portal, details can be auto-populated by searching for the contact in the search box below the element.



8.32 Spatial reference system

Gemini

Spatial reference system

INSPIRE

n/a

ISO19115

MD_ReferenceSystem.referenceSystemIdentifier > RS_Identifier.code

Obligation

Mandatory

occurrence

Many

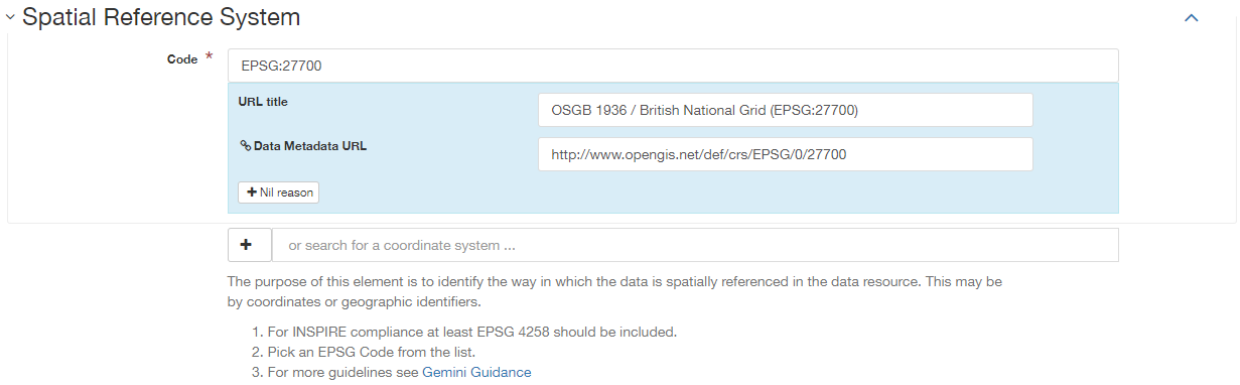
Definition

Identifier, name or description of the system of spatial referencing, whether by coordinates or geographic identifiers, used in the data resource.

Guidance

The reference system should be recorded referencing a well known common register (e.g. EPSG Geodetic Parameter Registry) in a URL link format. For INSPIRE purposes the **first entry** must be one of the reference systems listed in Annex D.4 (Default Coordinate Reference Systems) of the INSPIRE Metadata Technical Guidelines. For this reason it is recommended that ETRS89 is included as the first entry, and if desired British National Grid as a secondary entry. Failure to do so will result in a validation error.

The box below the element can be used to search for and add additional reference systems.



8.33 Spatial representation type

Gemini

Spatial representation type

INSPIRE

Spatial representation type

ISO19115

MD_DataIdentification.spatialRepresentationType

Obligation

Mandatory

occurrence

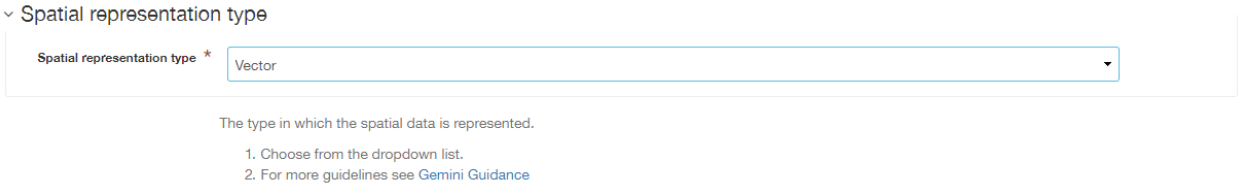
Many

Definition

The method used to spatially represent geographic information.

Guidance

This element uses the MD_SpatialRepresentationTypeCode from ISO 19115. Available options are *vector* (the defualt), *grid* (for images and coverage data), *tin* (surface data), and *text, table* (for datasets with an indirect spatial reference).



8.34 Spatial resolution - Distance

Gemini
Spatial resolution

INSPIRE
Spatial resolution

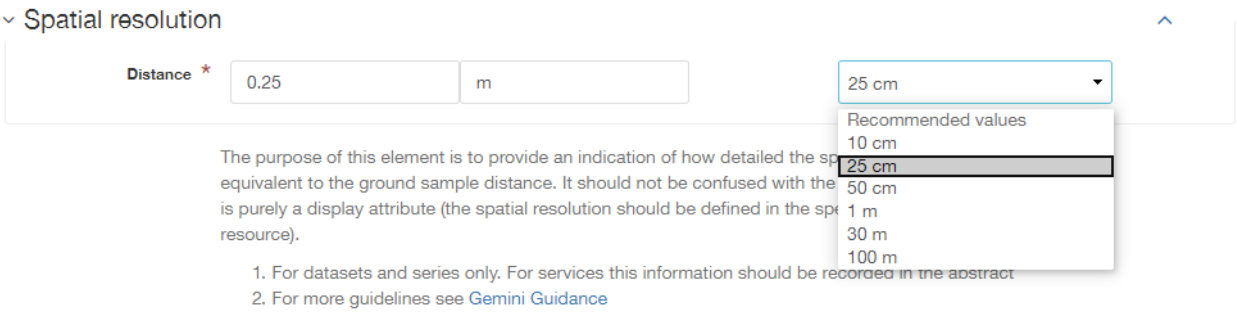
ISO19115
MD_Identification.spatialResolution > MD_Resolution.distance

Obligation
Conditional

occurrence
Many

Definition
A distance measure of the granularity (in metres), providing an indication of how detailed the data is. It is equivalent to the ground sample distance and should not be confused with the scale of a map (which is purely a display attribute).

Guidance
Enter values that are real numbers, greater than 0, and specified in metres. Commonly used distances can be added from the recommended values drop down next to the element. For data captured in the field, it is the precision at which the data is captured (this may be the accuracy for topographic surveys, or the average sampling distance in an environmental survey). For data taken from maps, it is the positional accuracy of the map, while for image data it is the resolution of the image.



8.35 Spatial resolution - Equivalent scale

Gemini
Equivalent scale

INSPIRE
Equivalent scale

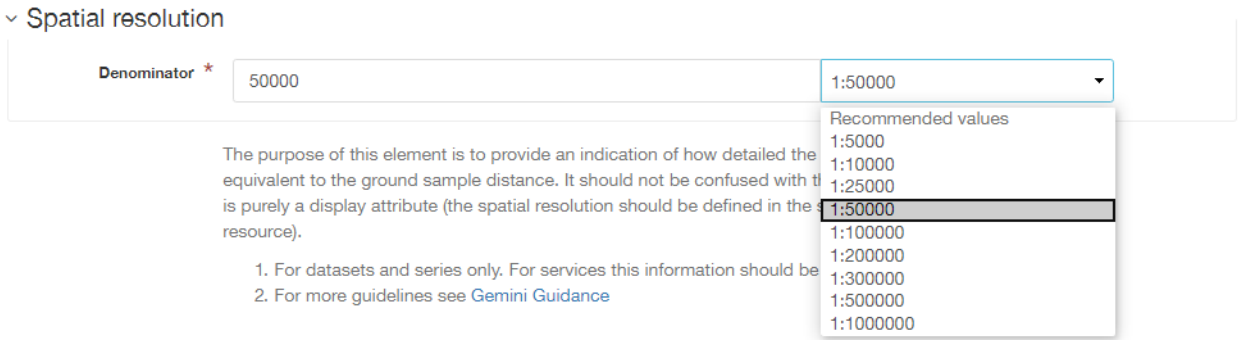
ISO19115
MD_Identification.spatialResolution > MD_Resolution.equivalentScale > MD_RepresentativeFraction.denominator

Obligation
Optional

occurrence
Many

Definition
The level of detail expressed as the scale denominator of a comparable hardcopy map or chart.

Guidance
Where the data is captured from a map, the scale of that map should be recorded as a positive integer. Note that *distance* is the preferred expression for spatial resolution. The equivalent scale should only be given when the distance cannot be determined.



8.36 Title

Gemini
Title

INSPIRE
Resource title

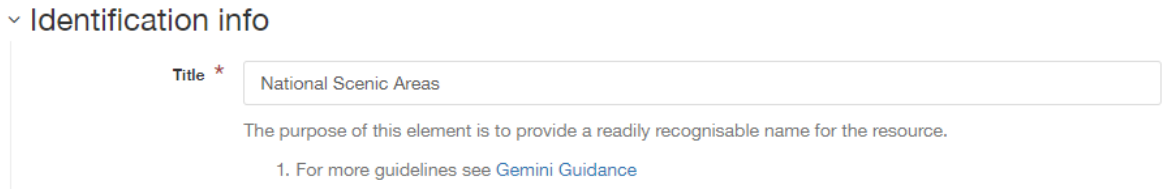
ISO19115
MD_DataIdentification.citation > CI_Citation.title

Obligation
Mandatory

occurrence
One

Definition
The name given to the data resource.

Guidance
This should be the formal or product name if one exists. Otherwise the title should be created that is short, encapsulates the subject, temporal and spatial coverage of the data resource, and does not contain terms or jargon that make it incomprehensible.



8.37 Topic category

Gemini
Topic category

INSPIRE
Resource topic category

ISO19115
MD_DataIdentification.topicCategory

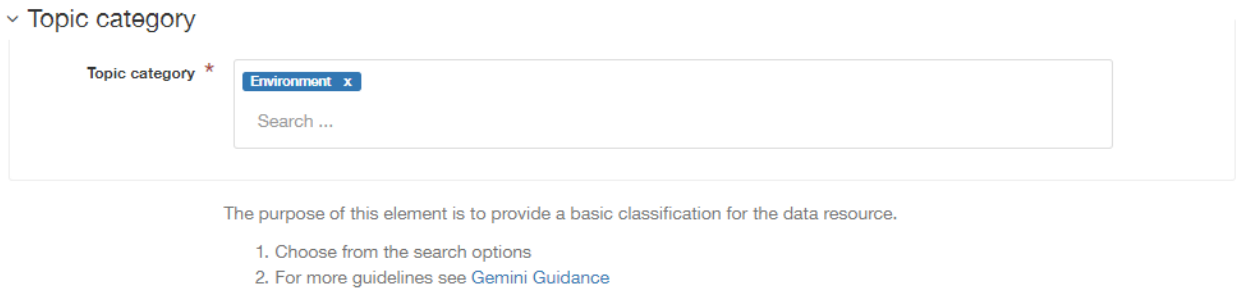
Obligation
Mandatory (datasets), N/A (services)

occurrence
Many

Definition
Describes the main theme(s) of the data resource, using topic categories in accordance with ISO 19115 standard.

Guidance
Select from the drop down list one or more categories that most closely represent the topic of the data resource. This element is only meant to represent the general theme of the information. *Keywords* should be used to provide greater detail on the nature of the dataset. While more than one topic category can be applied, only a limited number of most relevant should be chosen (e.g. topographic maps should not be classified as farming). Multiple topic categories can be added.

Note that the choice of topic category will dictate which categories the data resource is listed under on the **Browse by topics** section of the homepage.



8.38 Use constraints

Gemini
Use constraints

INSPIRE
Conditions applying to access and use

ISO19115
MD_Identification.resourceConstraints > MD_LegalConstraints.useConstraints & otherConstraints

Obligation
Mandatory

occurrence
Many

Definition
Restrictions and legal constraints on **using** the data resource. This can be entered as a free text statement, or link to a URL containing the information.

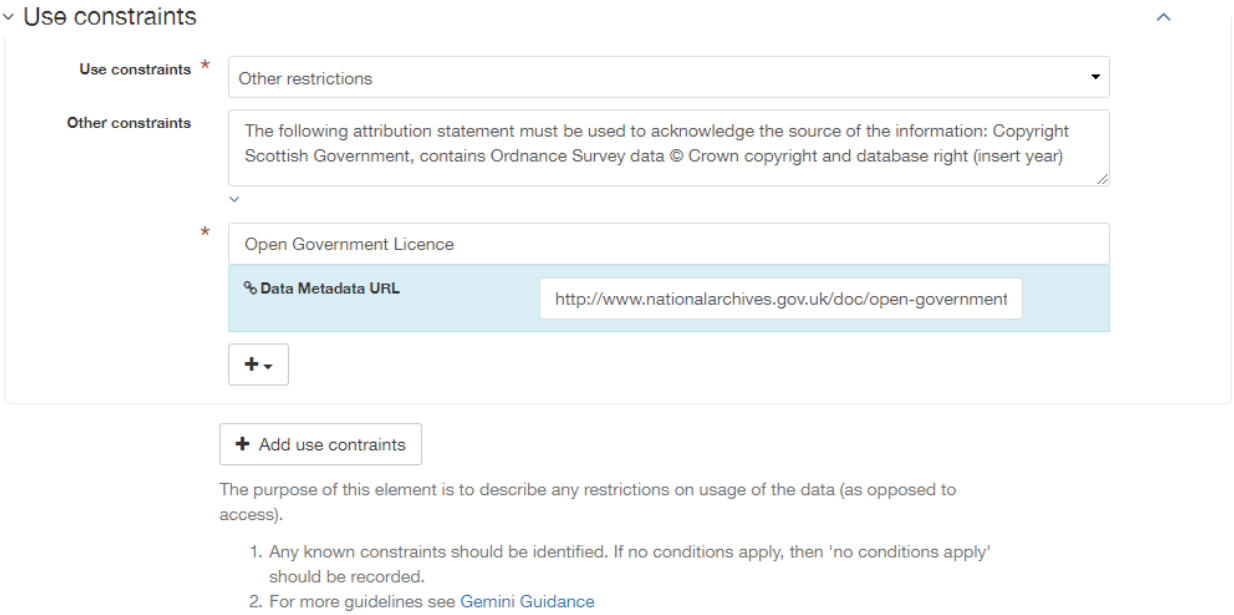
Guidance
Use constraints are different from *limitations on public access* which describe limitations on access to the data. A data resource can be openly accessible (which all INSPIRE data should be), but have restrictions on its use such as licensing, fees, or usage limitations.

This element comprises two sub-elements: the 'use constraints' which should be set to *other restrictions*, and 'other constraints' which can be free text or a URL link.

1| useConstraints- should contain an MD_RestrictionCode element with code list value "otherRestrictions"

2| otherConstraints- a free text element describing the usage restrictions or link to a URL, as below.

To link to a URL in the otherConstraints element, click the button and choose either the *anchor* option. All records on spatialdata.gov.scot should document the licencing arrangements for the data resource using the anchor type. Where possible, this should link to a URL such as the Open Government Licence, Non-Commercial Government Licence, or INSPIRE End User Licence. Users can further categorise their records in terms of licence type by following the guidance in the assigning a licence category section.



CHAPTER

NINE

ANNEX 1: REQUIREMENTS FOR METADATA TO BE CORRECTLY IDENTIFIED AS UK GEMINI

Records that are imported into SpatialData.gov.scot (rather than created within the portal using the available templates) must include the following XML elements to ensure that the record is correctly identified as UK GEMINI upon import.

Note: Using the default **to-gemini23** *xsl transformation when importing will do this for you.*

9.1 Root element

The root element should include a link to the gml 3.2 namespace and should not include xsi:schemalocation as this is handled internally:

```
<gmd:MD_Metadata xmlns:gmd="http://www.isotc211.org/2005/gmd"
                 xmlns:srv="http://www.isotc211.org/2005/srv"
                 xmlns:gts="http://www.isotc211.org/2005/gts"
                 xmlns:gco="http://www.isotc211.org/2005/gco"
                 xmlns:gml="http://www.opengis.net/gml/3.2"
                 xmlns:xlink="http://www.w3.org/1999/xlink"
                 xmlns:gmx="http://www.isotc211.org/2005/gmx"
                 xmlns:gsr="http://www.isotc211.org/2005/gsr"
                 xmlns:gss="http://www.isotc211.org/2005/gss"
                 xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
```

9.2 Metadata standard name and version

The correct metadata standard name and version should be included. Note these are case-sensitive:

```
 <gmd:metadataStandardName>
    <gmx:Anchor xlink:href="http://vocab.nerc.ac.uk/collection/M25/current/GEMINI/">UK␣
↪GEMINI</gmx:Anchor>
</gmd:metadataStandardName>
 <gmd:metadataStandardVersion>
    <gco:CharacterString>2.3</gco:CharacterString>
 </gmd:metadataStandardVersion>
```

CHAPTER

TEN

ANNEX 2: UPGRADING TO UK GEMINI 2.3

SpatialData.gov.scot has now implemented UK GEMINI 2.3. All new metadata created on the portal will conform to version 2.3, and metadata publishers are strongly encouraged to upgrade their existing 2.2 records as soon as possible. This section provides guidance on how users can upgrade their existing metadata via a number of methods. For detail on what has changed from version 2.2 to 2.3, please see information provided by the Association of Geographic Information (AGI).

The conversion tools will make the following changes to 2.2 records to make them compliant with Gemini 2.3:

- Add or otherwise update the **MetadataStandardName** to UK GEMINI and the **MetadataStandardVersion** to 2.3.
- Change the encoding of the **Access Constraints** and **Use Limitations** elements to meet the new standard, either making a best guess at moving your existing constraints into the correct encoding, or adding the default "no limitations" constraints as appropriate.
- Adds the default INSPIRE **Conformance Report** for datasets or services if one does not already exist.
- Replaces any references to http://www.opengis.net/gml with http://www.opengis.net/gml/3.2.
- Adds a default **Character Encoding** of UTF8.

10.1 Updating through an editing session

Existing records on SpatialData.gov.scot can be converted to Gemini 2.3 through an editing session. Before users begin they should ensure that their existing metadata record contains the following tags which identify it as Gemini 2.2:

```
<gmd:metadataStandardName>
        <gco:CharacterString>UK GEMINI</gco:CharacterString>
</gmd:metadataStandardName>
<gmd:metadataStandardVersion>
        <gco:CharacterString>2.2</gco:CharacterString>
</gmd:metadataStandardVersion>
```

To convert an existing record to Gemini 2.3:

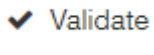
1| Follow the steps to begin an editing session.

2| On the right hand side of the editing board, run the suggestions wizard.

Note: if the if the record is currently recognised as Gemini 2.2, the following suggestion should appear: Metadata Schema is Gemini 2.2. Run this task to convert to Gemini 2.3.

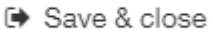
3| Click the suggestion to run the transformation script.

Note: the record will be converted to Gemini 2.3 and the editing view will change to show the embedded 2.3 guidance.

4| Ensure the record is valid by clicking 

in the header bar. See validating metadata for more information.

Note: The conversion process will not automatically create valid metadata. Users must ensure that the record validates and correct any errors.

5| Click 

to save and close the record.

10.2 Updating records on import

Metadata records can also be converted from 2.2 to 2.3 on import into SpatialData.gov.scot.

1| Follow steps 1 to 4 of importing an existing XML metadata record.

2| For the XSLT transformation, select GEMINI 2.2 to GEMINI 2.3 from the drop down menu.

3| Follow the remaining steps to import the record.

4| Users should ensure the imported metadata is valid. See validating metadata for more information.

10.3 Updating harvested records

Some organisations maintain their own spatial data portals and have their metadata harvested on a scheduled basis by SpatialData.gov.scot. Depending on what version of metadata is being supplied, an xslt conversion may be required on each harvest. Publishers who maintain their records via harvest should contact SSDI.metadata@gov.scot with any queries.

10.4 Updating through a batch process

Administrator users on SpatialData.gov.scot will have the ability to convert records to Gemini 2.3 via a batch process. See the administrator guidance for more information.

10.5 Common errors

The following is a list of common errors encountered when converting from Gemini 2.2. to 2.3 that cannot be addressed by the transformation script.

- **Abstract Length**: Gemini 2.3 requires and abstract with a minimum length of 100 characters.

CHAPTER

ELEVEN

ANNEX 3: BEST PRACTICE GUIDE

Good quality metadata is key to understanding whether data is fit for purpose, has value, and is reliable - particularly if it is to inform policy decisions. Further, it is noted that most users search for data through general search engines such as Google. Since data is often not readable by search engines it is generally recognised that searches are performed on the metadata, rather than the data itself. This means that improvements to the metadata content can have the most significant impact on data discovery.

This section aims to provide users with best practice guidance on how to improve their metadata quality to improve data discoverability.

- Title
- Abstract
- **Links in records:**
  - http rather than https
  - 404s
  - Protocol

This section is currently under development.

CHAPTER

TWELVE

INTRODUCTION

12.1 Overview

This documentation is intended to provide guidance to administrators of the SSDI Catalogue. It assumes familiarity with the user guidance, particularly around the creation and validation of metadata.

The administrative functionality within the catalogue is accessed via the Admin console, on the top menu when you log in with an administrator profile. Additional functionality, such as downloading catalogue-wide reports, is available from the advanced search page and also the **Editor board**.

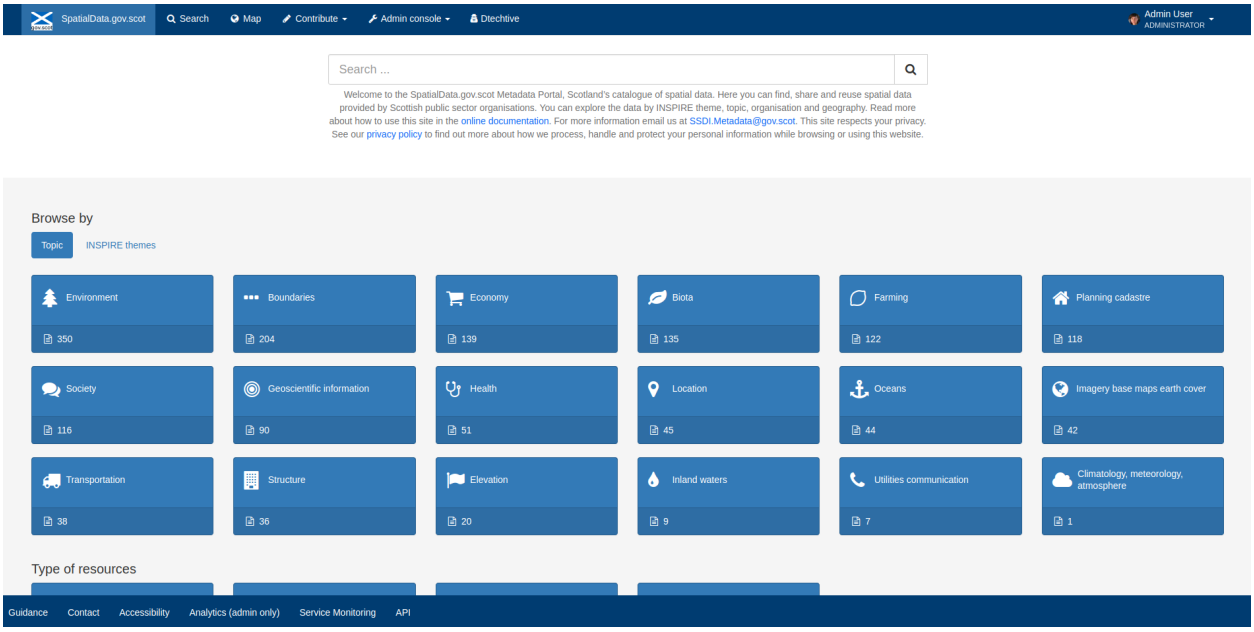


Figure 1.1.1: SSDI catalogue main page, showing admin console link

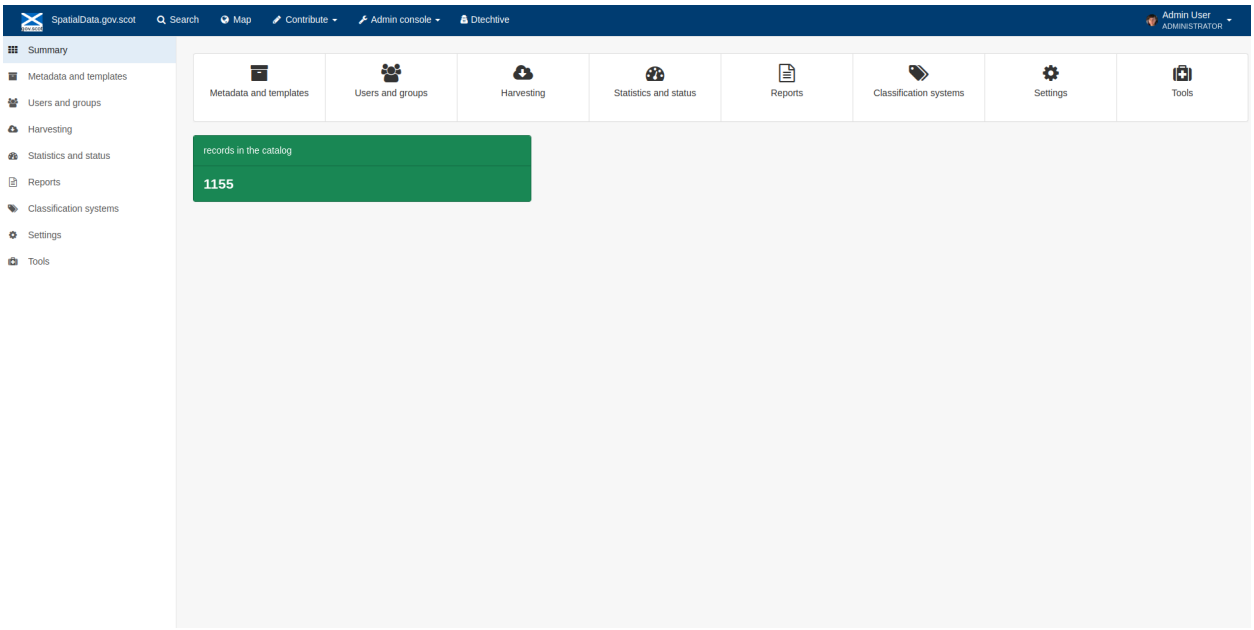


Figure 1.1.2: SSDI catalogue admin console, for a full administrator

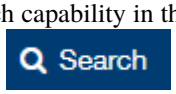
The level of functionality available in the admin console is dependent on the privileges of the logged in user. The above image shows the admin console for a full Administrator. This page also provides a quick "at a glance" view of the number of records available.

CHAPTER

THIRTEEN

SEARCHES

13.1 Advanced Search

The Advanced Search capability in the catalogue is accessed by clicking the magnifying glass icon on the home page or by clicking on the 

button on the top menu to navigate to the Search page.

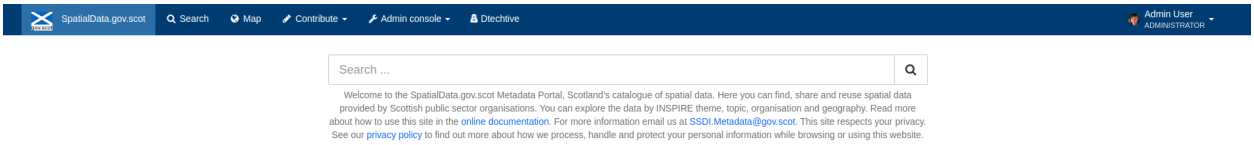


Figure 2.1.1: Search icon on main catalogue page

Filtering options, or search facets, are available to the left of the search results, as a series of check boxes. The results can be sorted by Title, Relevancy, Rating and Popularity, and either lowest or highest scale first.

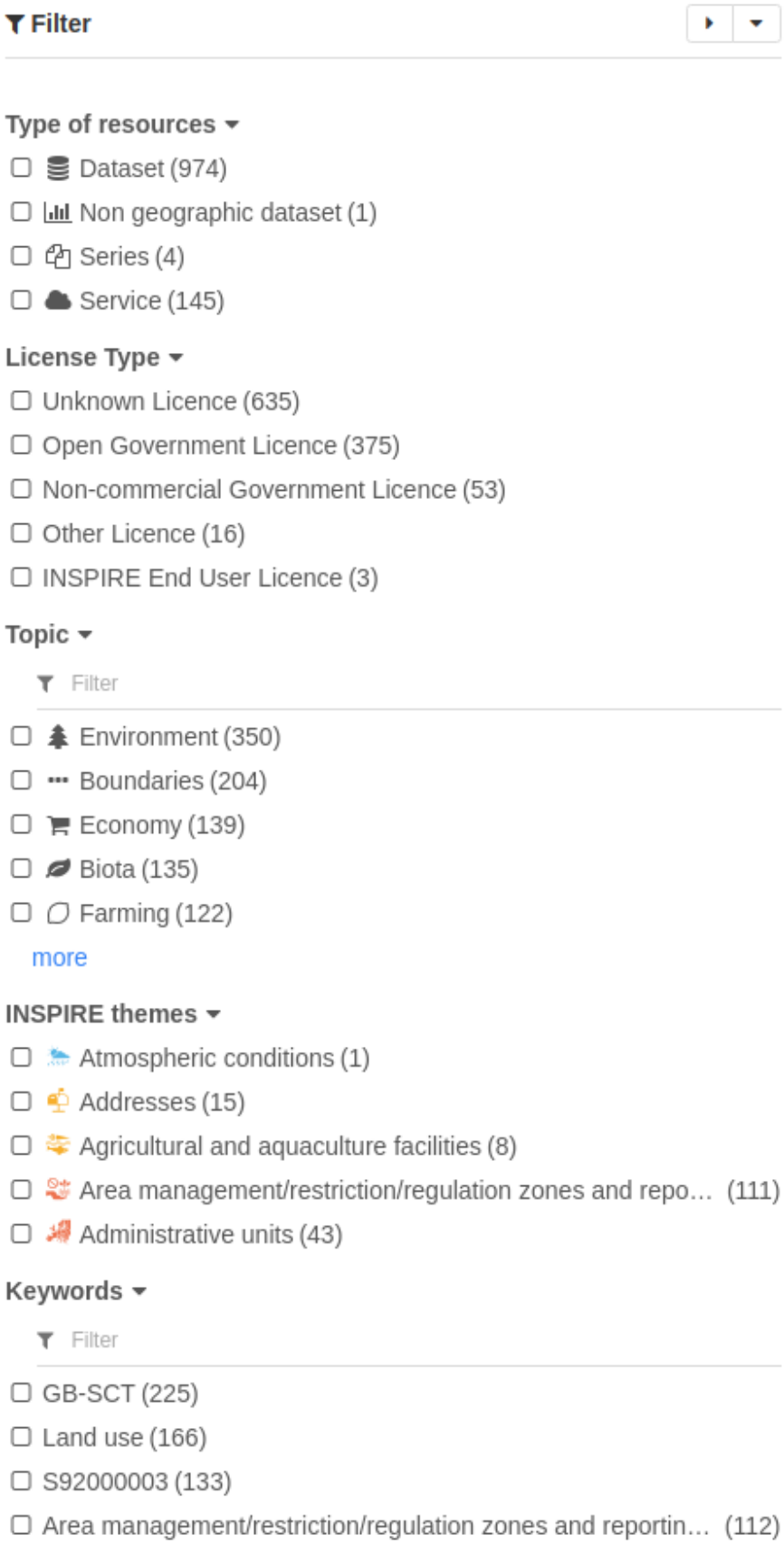

Filter
Type of resources
Dataset (974)
Non geographic dataset (1)
Series (4)
Service (145)
License Type
Unknown Licence (635)
Open Government Licence (375)
Non-commercial Government Licence (53)
Other Licence (16)
INSPIRE End User Licence (3)
Topic
Filter
Environment (350)
Boundaries (204)
Economy (139)
Biota (135)
Farming (122)
more
INSPIRE themes
Atmospheric conditions (1)
Addresses (15)
Agricultural and aquaculture facilities (8)
Area management/restriction/regulation zones and repo… (111)
Administrative units (43)
Keywords
Filter
GB-SCT (225)
Land use (166)
S92000003 (133)
Area management/restriction/regulation zones and reportin… (112)

Figure 2.1.2: Search facets, or further filtering options on the search page

Other search options are available from the icon to the right of the main search box. This expands to show **Options**, **Languages** and **Advanced** options. **Options** allows users to search by Exact match, In title only, and Only my records. **Languages** allows users to limit the search based on the metadata language of a record. **Advanced** allows users to limit the search based on the temporal coverage of a record.

Further search capabilities can be accessed by clicking the

button on the main toolbar. This opens the **Editor board**, where there are also options to create or import new metadata, and also view privileges for or edit existing records. This page shows different search filtering options or facets, including group, schema, validation status, workflow status and so on.

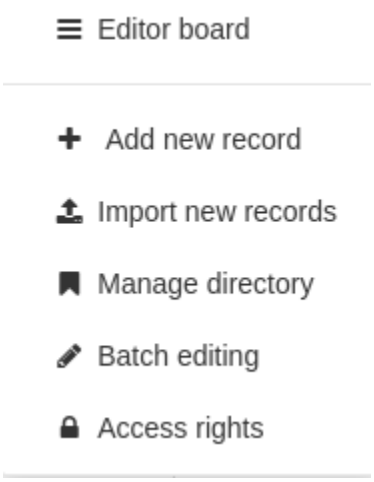


Figure 2.1.3: Options to Create or Import new data

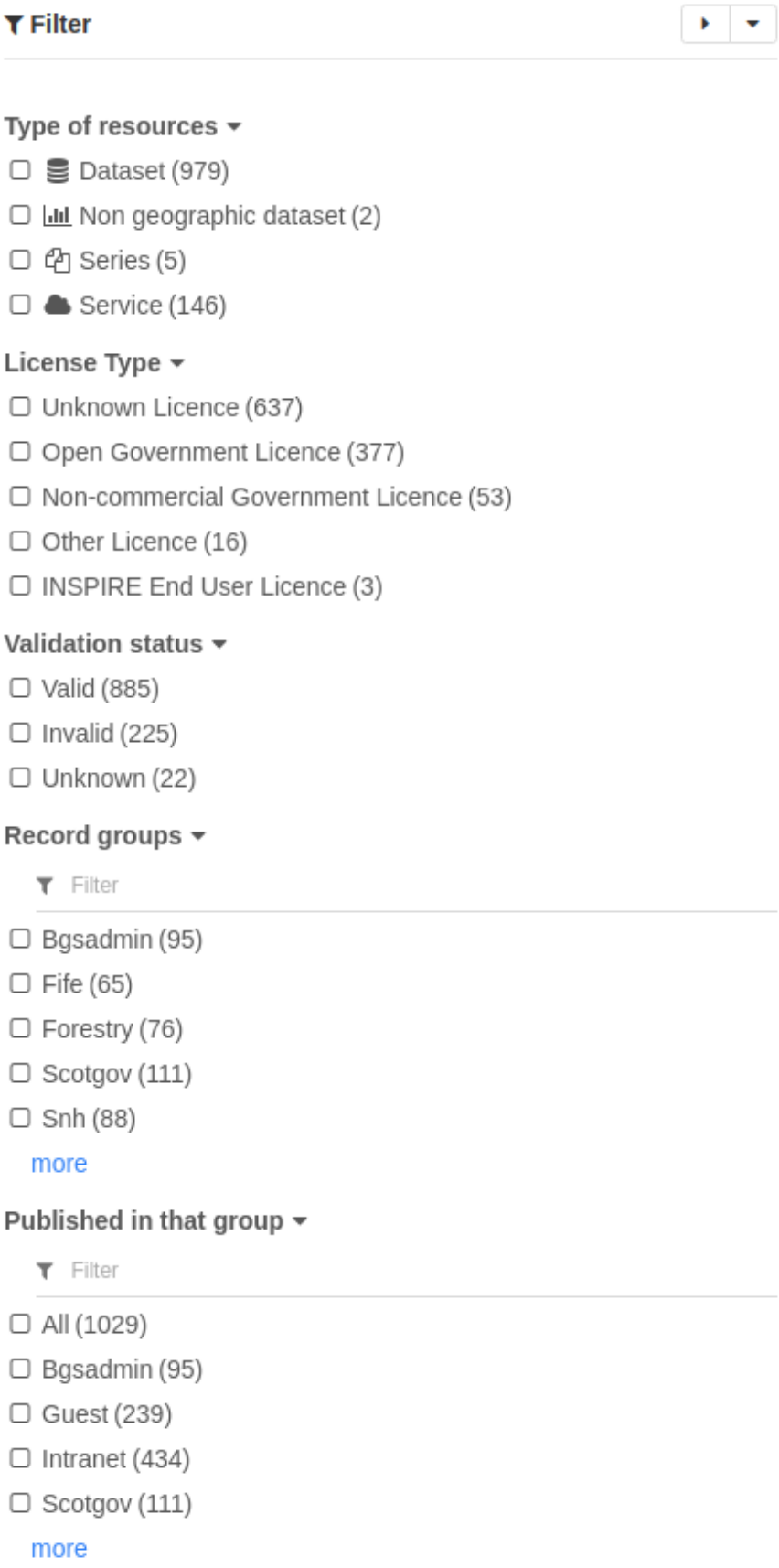

Filter
Type of resources
Dataset (979)
Non geographic dataset (2)
Series (5)
Service (146)
License Type
Unknown Licence (637)
Open Government Licence (377)
Non-commercial Government Licence (53)
Other Licence (16)
INSPIRE End User Licence (3)
Validation status
Valid (885)
Invalid (225)
Unknown (22)
Record groups
Filter
Bgsadmin (95)
Fife (65)
Forestry (76)
Scotgov (111)
Snh (88)
more
Published in that group
Filter
All (1029)
Bgsadmin (95)
Guest (239)
Intranet (434)
Scotgov (111)
more

Figure 2.1.4: Search facets available from **Editor board**

CHAPTER

FOURTEEN

ADVANCED WORKFLOW

The **Editor board** can be used to perform administrative functions on individual or batch metarecords. Tools for acting on individual records are represented by icons to the right of the metadata title. The validation status of a record is indicated by the colour of it's icon:

- Green- validated and passing checks
- Red- validated but not passing checks
- Grey- not yet validated
- White- a template or other record that should not be validated

Figure 3.1.1: Administrative functions that act on individual records, accessed from the **Editor board**

In order from left to right these are:

- Privileges- set privileges on which groups can access or edit this record
- Edit- access the metadata editor for this record
- Delete this record
- Create a child record
- Duplicate record

To act on multiple metadata records, use the select function and choose the appropriate function from the dropdown list:

- Export (ZIP)- exports the records in MEF format
- Export (PDF)- exports as a combined PDF- note this will disregard any templates
- Export (CSV)- exports as a combined CSV- note this will disregard any templates
- Selection Only
- Update privilges- note that this will **UPDATE** privileges rather than **APPEND** to existing ones
- Publish/Unpublish- add or remove the "publish" privilege from the "All" group
- Transfer Ownership
- Validate
- Validate record links

- Update licence
- Delete
- Index records
- Create collection from selection as - create a series from the selected records

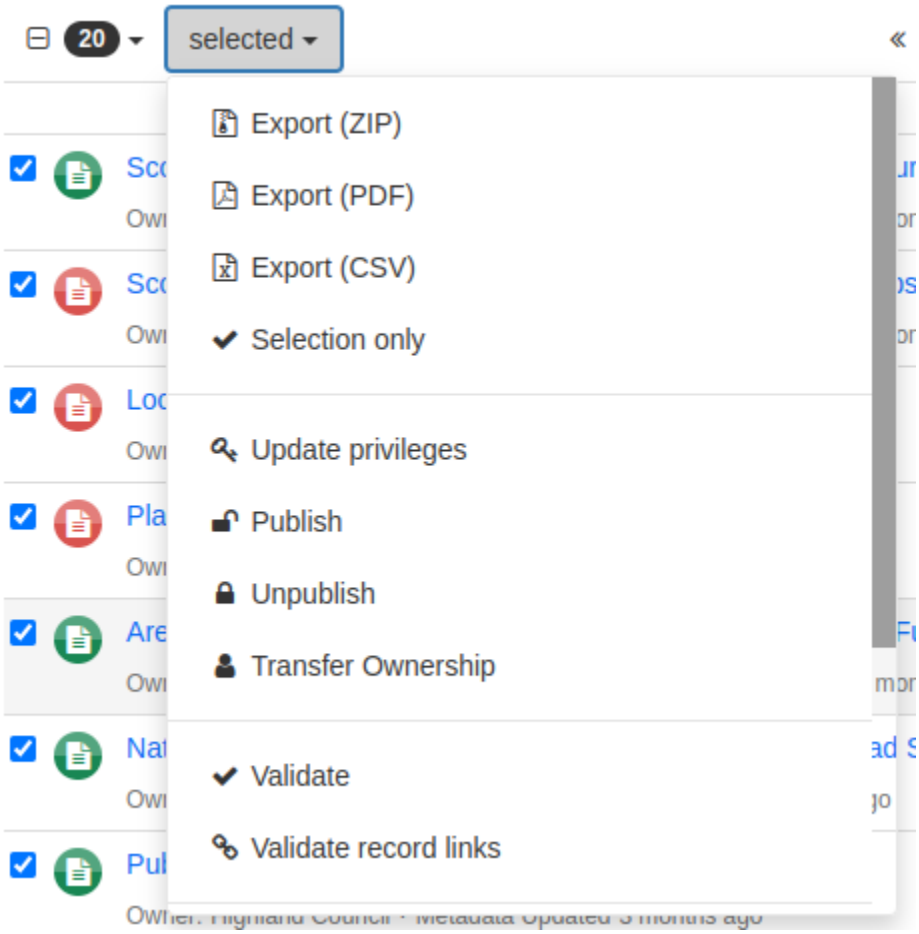


Figure 3.1.2: Administrative functions that act on multiple records- top options

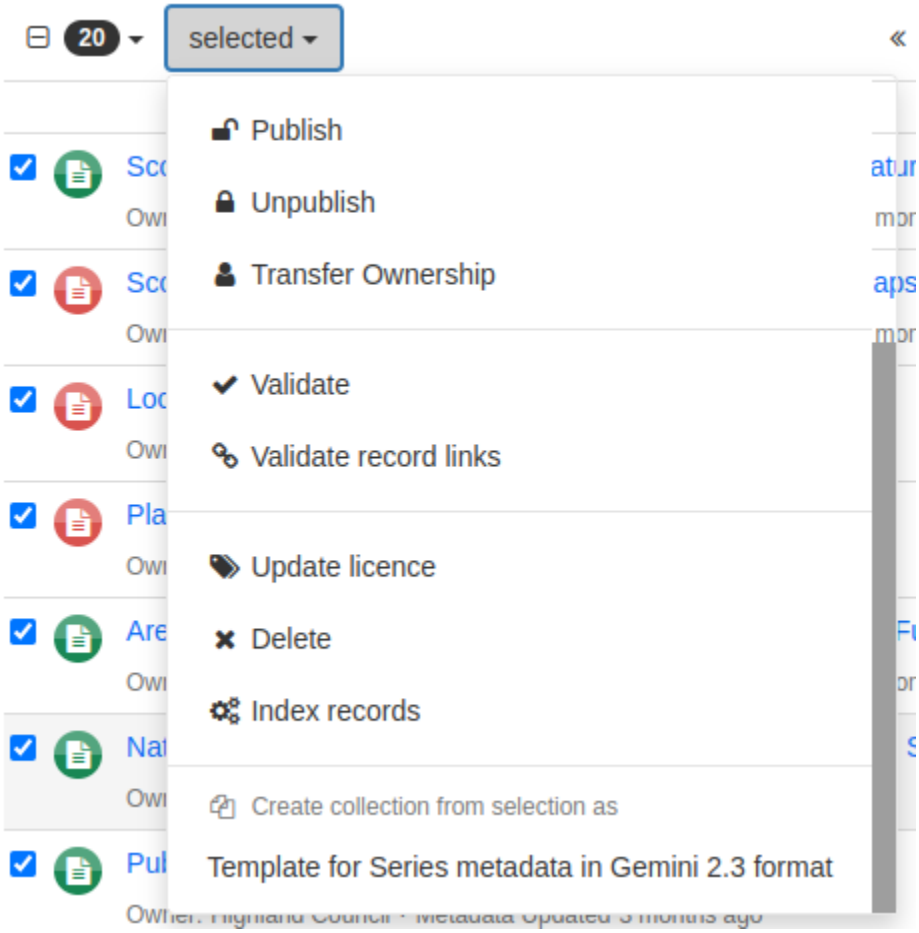


Figure 3.1.3: Administrative functions that act on multiple records- bottom options

CHAPTER

FIFTEEN

MANAGE DIRECTORY

Directories are snippets of information that can be pre-completed and inserted into metadata records. They are derived from subtemplates that are part of metadata standards. The available subtemplates are shown as tabs across the top of the Directory subsection- for Gemini 2.2 and 2.3 these are **Organizations and contacts**, **Data Quality Reports (Completeness)** and **Data Quality Reports (Domain Consistency)**. The **Manage Directory** section can be accessed by clicking on the Contribute button in the header menu and then on **Manage directory**.

Selecting **Organizations and contacts** shows the metadata snippet for adding a Points of Contact subtemplate. To create a new record based on this template, click the "Duplicate" icon ( ) in the **Actions** dropdown.

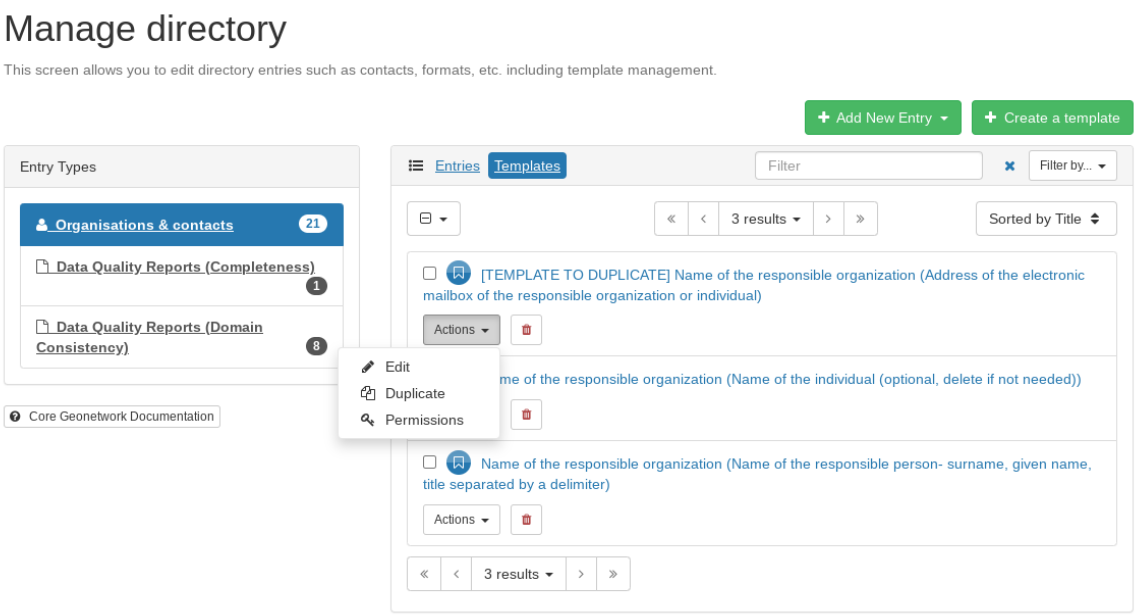


Figure 4.1.1: The Organizations and contacts interface

Along the top of the entry window are, from left to right:

- Group (dropdown)- which group should have ownership of this subtemplate
- Permissions- which groups should have visibility of this subtemplate
- Validation status
- Save
- Save and close

It's also possible to change the view that is used for completing this subtemplate, from default to xml view by clicking the "eye" symbol ( ).

Once saved, the contact will be available using the "search for a contact" dialogue when creating or editng a metadata record.

Figure 4.1.2: Adding a point of contact snippet when editing a record

The dropdown box next to the contact name allows the user to choose the element where this snippet should be inserted.

CHAPTER

SIXTEEN

BATCH EDITING

The **Batch editing** section can be accessed by clicking the

button in the header menu and then on **Batch editing**.

This section can be used to make XSL transformations on multiple records at once, such as to update contact information in bulk, change internal URLs or update keywords. **It is wise to request a database backup before performing a batch edit as there is no way to undo the transformation once it has been started.**

This process has three steps to it, each represented by a different tab at the top of the **Batch editing** page:

- Choose a set of records
- Define edits
- Apply changes

16.1 Choose a set of records

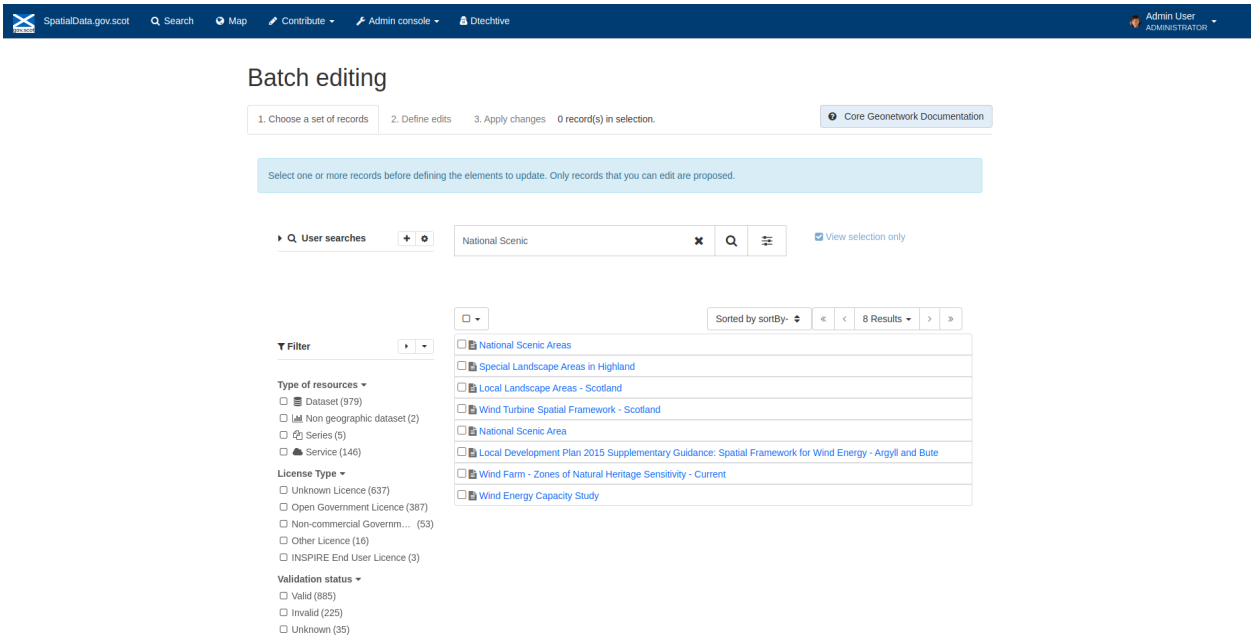


Figure 5.1.1: Batch editing tool showing search results for “National Scenic”

As well as searching for a record by title (as in Figure 5.1.1), a user can also filter the records using the facets on the left-hand side of the screen.

The options available for filtering are:

- Type of resources
- Status
- Validation status
- Record groups
- Published in that group
- Standards
- Harvested
- Record types
- Access

The Filter and Search term can be cleared by clicking on the button at the right of the search bar.

Figure 5.1.2: Search bar showing the available buttons

Once the desired records have been located and selected using the tick box next to their title, an option for the user to View selection only becomes available at the right of the search bar. Once the user is happy with the selection of records that are going to be changed, the next steps become available to be selected.

16.2 Define edits

Three distinct types of edits are available to the user, each represented by a radio button:

- Search and replace
- XPath editing
- Form editing

Search and replace

The fields available are:

- Value- the value to be replaced
- Replacement- the new value
- Regular expression flags- dropdown menu options include:
  - i: enables case insensitive matching
  - c: disables case insensitive matching
  - n: allows the period to match the newline character
  - m: enables multiline mode

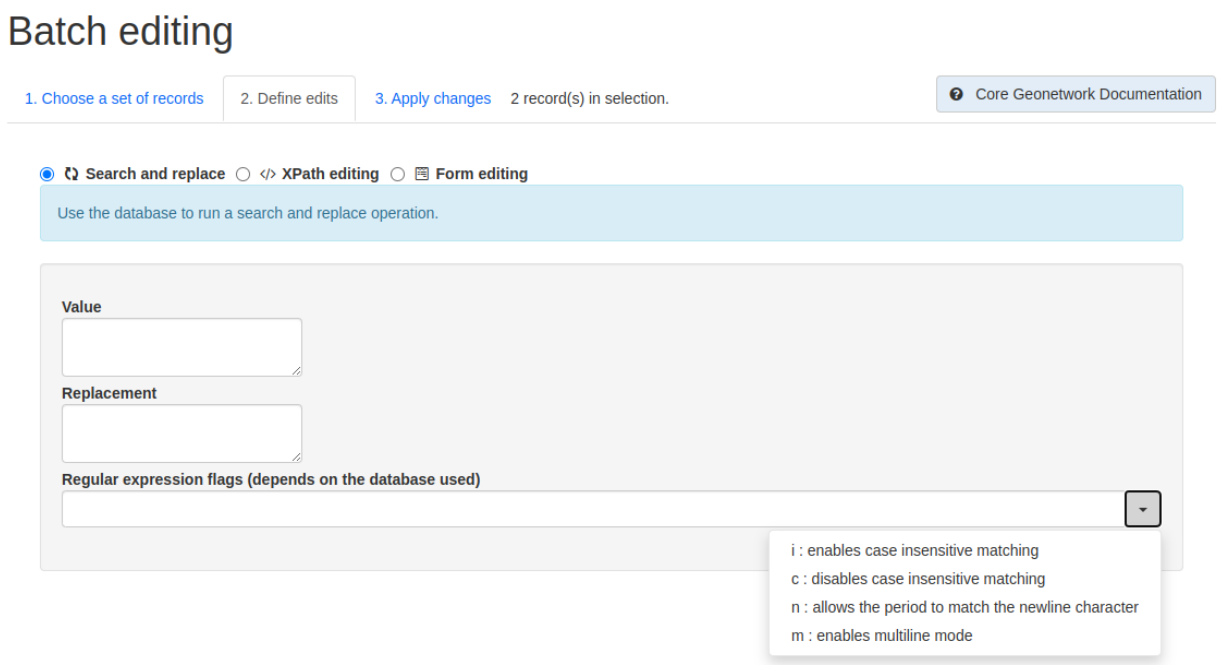


Figure 5.2.1: Batch editing tool showing the available **Search and replace** options

XPath editing

Note: XPath stands for XML Path Language. It uses a non-XML syntax to provide a flexible way of addressing (pointing to) different parts of an XML document. It can also be used to test addressed nodes within a document to determine whether they match a pattern or not. A good summary of its syntax can be found here: https://www.w3schools.com/xml/xpath_syntax.asp

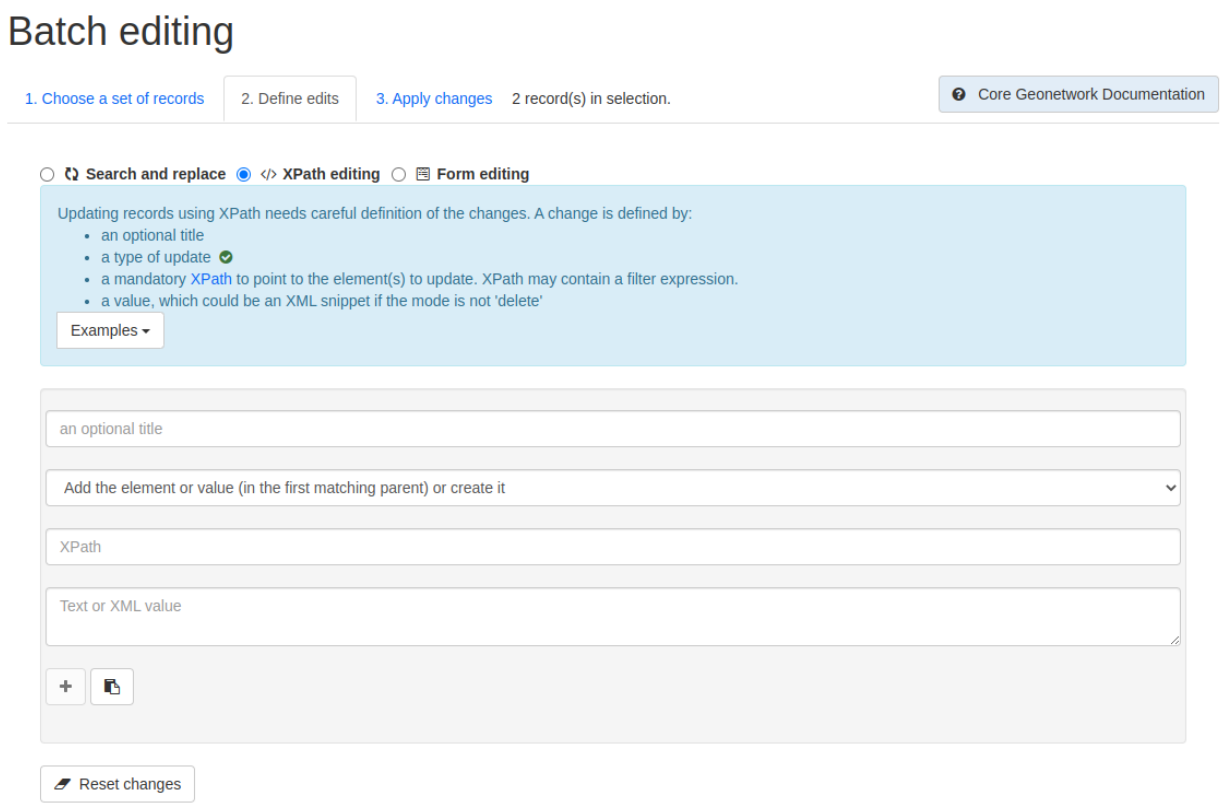


Figure 5.2.2: Batch editing tool showing the available **XPath editing** options

The fields available are:

- Title (optional)
- Replacement mode- dropdown menu options include:
  - Add the element or value (in the first matching parent) or create it
  - Replace the element or value (in the first matching parent)
  - Remove all matching elements
- Xpath- the Xpath to the element or value to be replaced
- Text or XML value- the new value or element

Once the fields have been filled in accordingly, the user needs to click the button to confirm the change.

At this point the user has a few options:

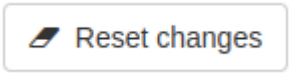
- Fill the top fields again and click the button to add another batch edit to the same set of records
- Click the button to edit an existing batch edit
- Click the button to remove an existing batch edit

- Click the button to copy the contents of an existing batch edit

Form editing

Note: Depending on the type of records selected, the list of fields you can update may change. When editing a mandatory field like the title, the field is updated. When editing a field which can contain multiple values, a new value is added.

Each of the sections can be expanded to show the available fields to edit and a new value can be inserted in the relevant fields.

There is also the option to reset all the changes, by clicking on the 

button at the bottom of the page.

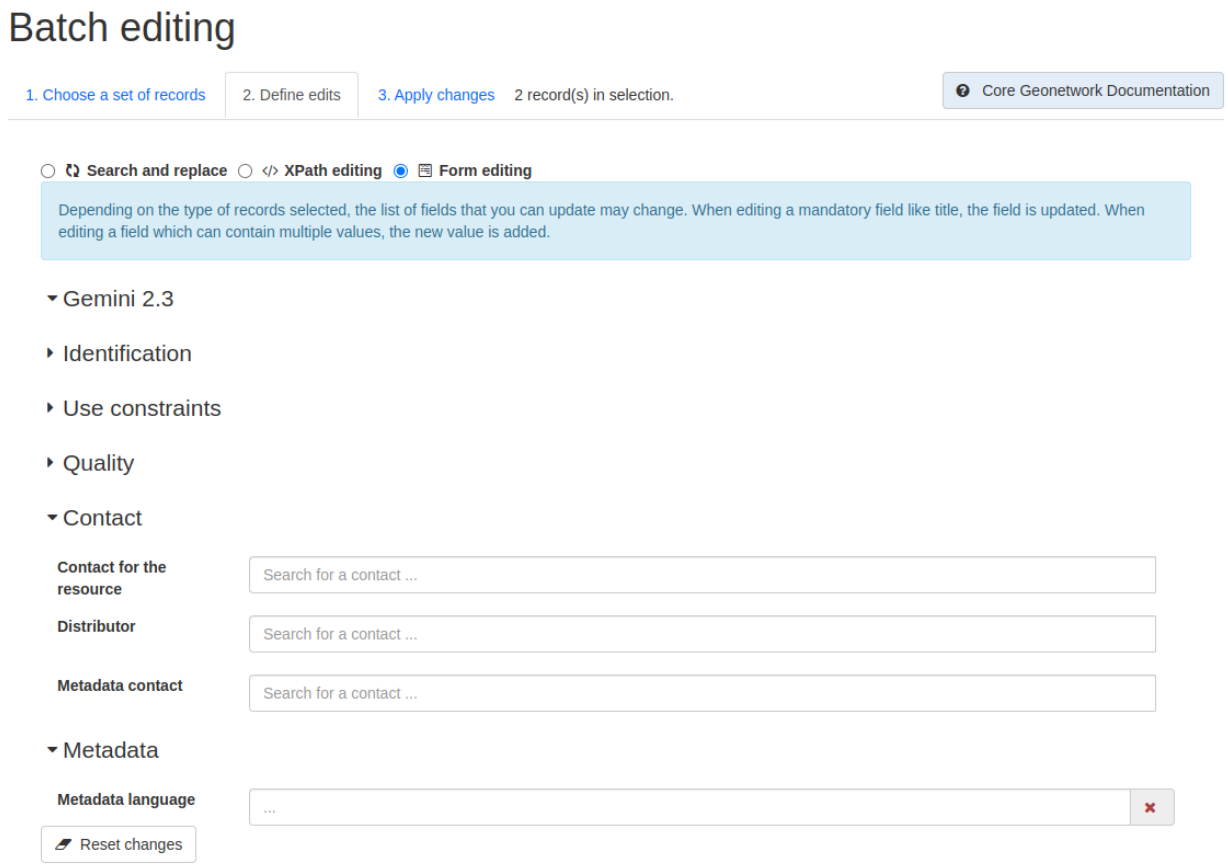


Figure 5.2.3: Batch editing tool showing an example of an expanded section and the Reset changes button

16.3 Apply changes

Once the user is happy with the set of records that will be changed and the modifications that will be applied, they can navigate to the last step - applying the changes.

This tab shows a summary of the changes that will be applied, as well as a list of records that will be changed and an option to “Update the modification date in the metadata document“.

Once the

button has been clicked the changes will be applied and can’t be reverted!

A report will be displayed showing the number of records processed and any errors or issues.

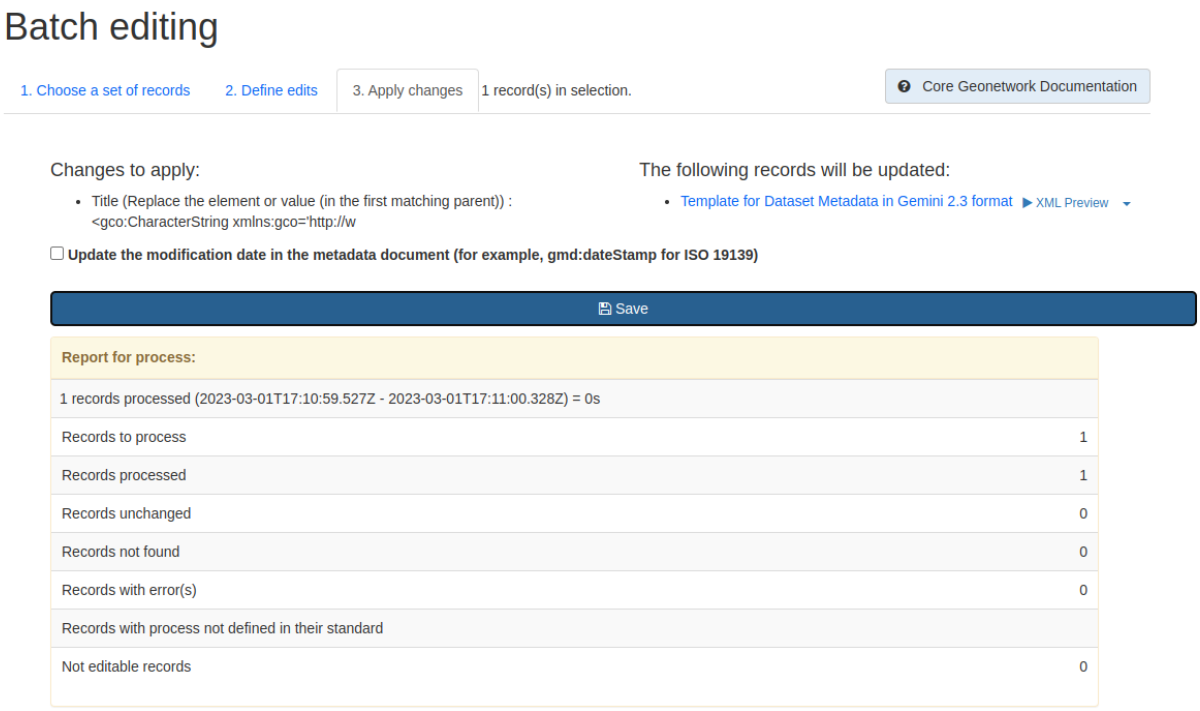


Figure 5.3.1: Batch editing tool showing the “Apply changes“ tab after changes have been applied

CHAPTER

SEVENTEEN

METADATA AND TEMPLATES

The Metadata and Templates button provides access to four subsections, as shown in the image below:

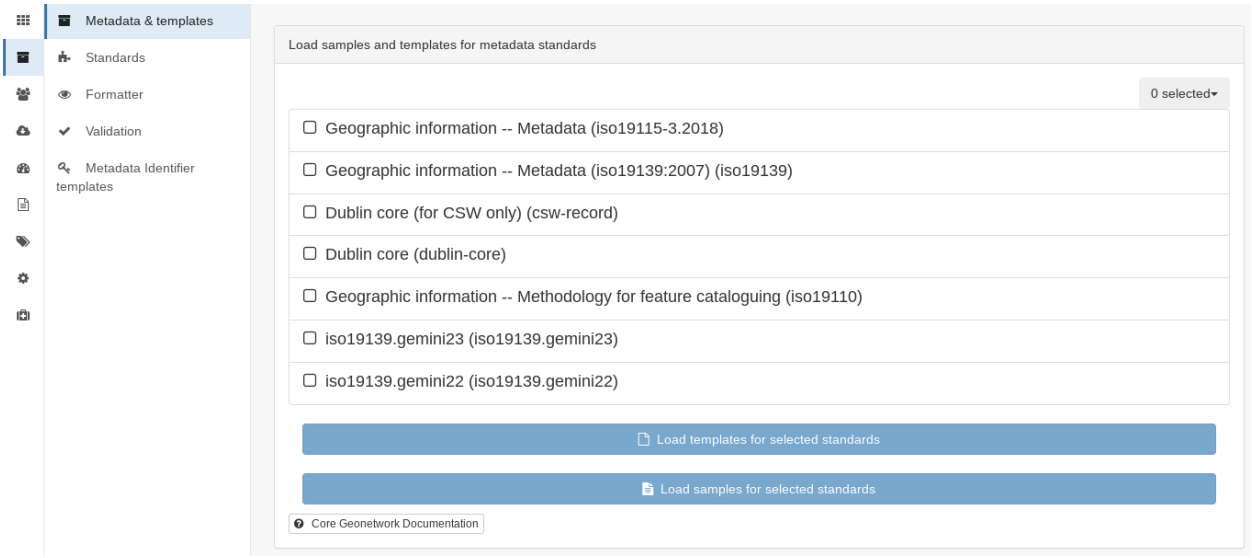


Figure 6.1.1: Metadata and Templates subsections

17.1 Metadata and Templates

This shows the metadata standards or profiles loaded onto the system. Selecting one or more of the standards activates the options to Load templates and Load samples for the selected standards.

Note that the templates have been already loaded for iso19139.gemini22

17.2 Standards

This shows information on the standards currently loaded in the catalog.

In GeoNetwork 4.2.x it is no longer possible to add new metadata standards via the user interface. To load a new standard, please contact the catalog administrator.

17.3 Formatter

Advanced

This allows advanced administrators/system maintainers to customise how metadata is displayed within Geonetwork. For further information on this topic see the Geonetwork help documentation at http://geonetwork-opensource.org/manuals/trunk/eng/users/customizing-application/creating-custom-view.html?highlight=formatter

17.4 Validation

Advanced

This section allows advanced administrators/system maintainers to see which schematron rules are in place for specific schemas and to edit them as required. **It is not recommended that changes are made in this section as it will impact on how records are validated**.

17.5 Metadata Identifier Templates

Advanced

By default this functionality is disabled in the admin settings, and identifiers are generated automatically by geonetwork when a record is created or imported. When enabled in the admin settings, this section allows the customisation of the identifier. The default is a randon UUID string, but identifier templates allow a pre-configured format with a template for rendering any user-generated elements. For example:

- scot.gov::{IDCODE} would render the IDCODE as an element to be completed during metadata creation
- scot.gov::{SLA}:{ID} would render both SLA and ID as elements to be completed during metadata creation

When this setting is enabled, additional options are available when creating a record from a template. When importing records, the existing file identifier element is used as the UUID. An error is triggered if this is not unique in the catalogue.

CHAPTER

EIGHTEEN

HARVESTING

Harvesting allows you to consume metadata from external services on a scheduled basis. The **Catalog harvesters** section has three subsections, as shown in the image below. It also shows any existing harvester nodes set up on the system, and their current status (running or paused).

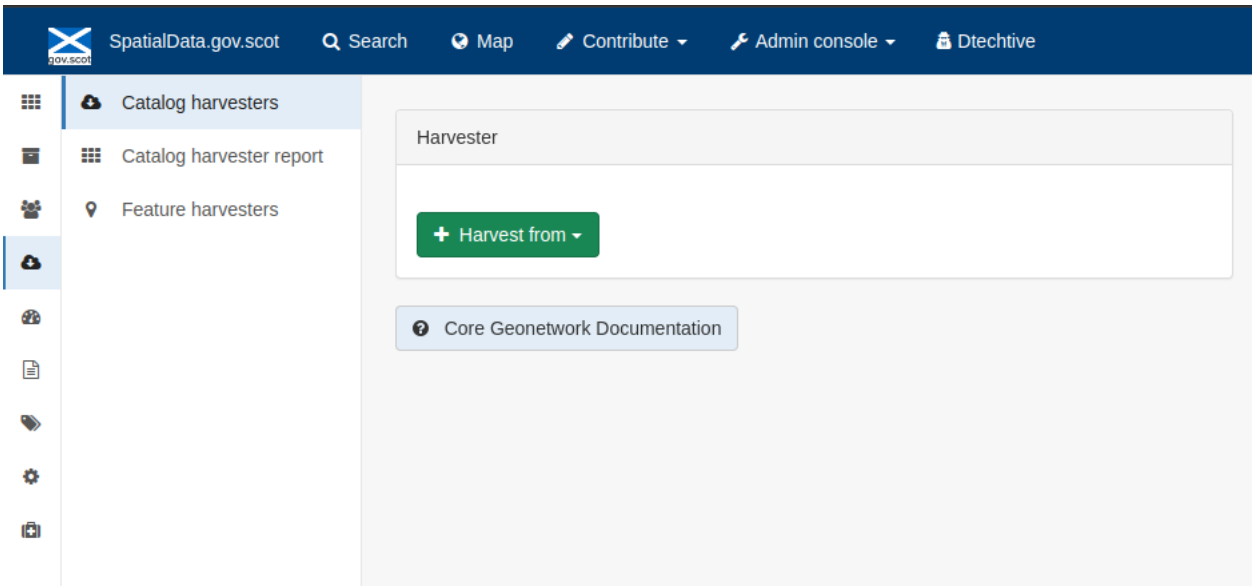


Figure 7.1.1: Catalog harvesters section

18.1 Catalog Harvesters

From this section you can see the list of available harvesting nodes, and clone an existing node or add a new one. You can also view and edit the settings of each harvester, see a harvester's history and a summary of the metadata records harvested by each node.

To add a new harvester node, either clone an existing one by selecting it from the dropdown Clone list in the above image, or click the "Harvest from" button to access the dropdown list of harvester types. The configuration options available will depend on the type of node selected.

Settings

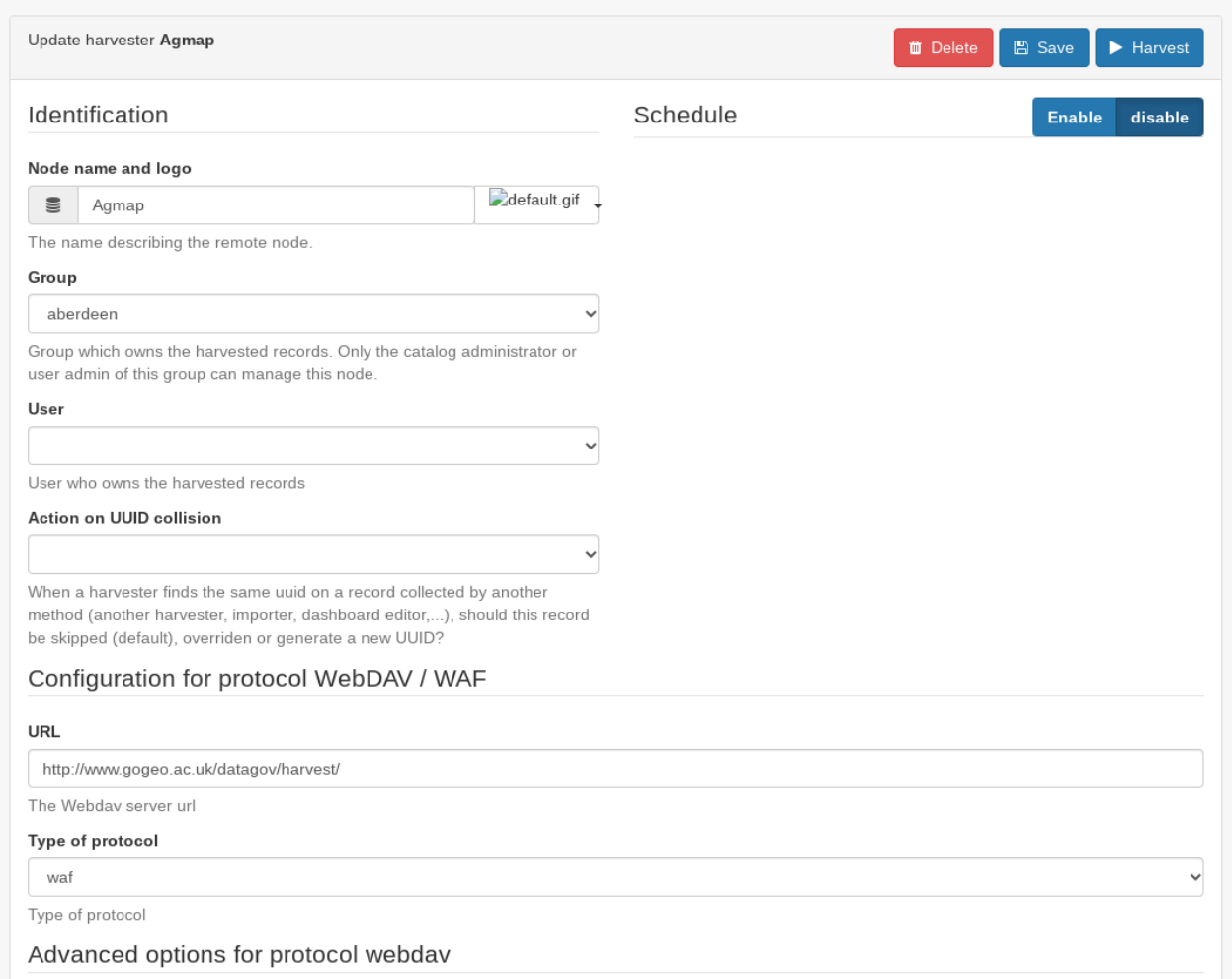


Figure 7.2.1: Common harvester node configuration options, top half of screen

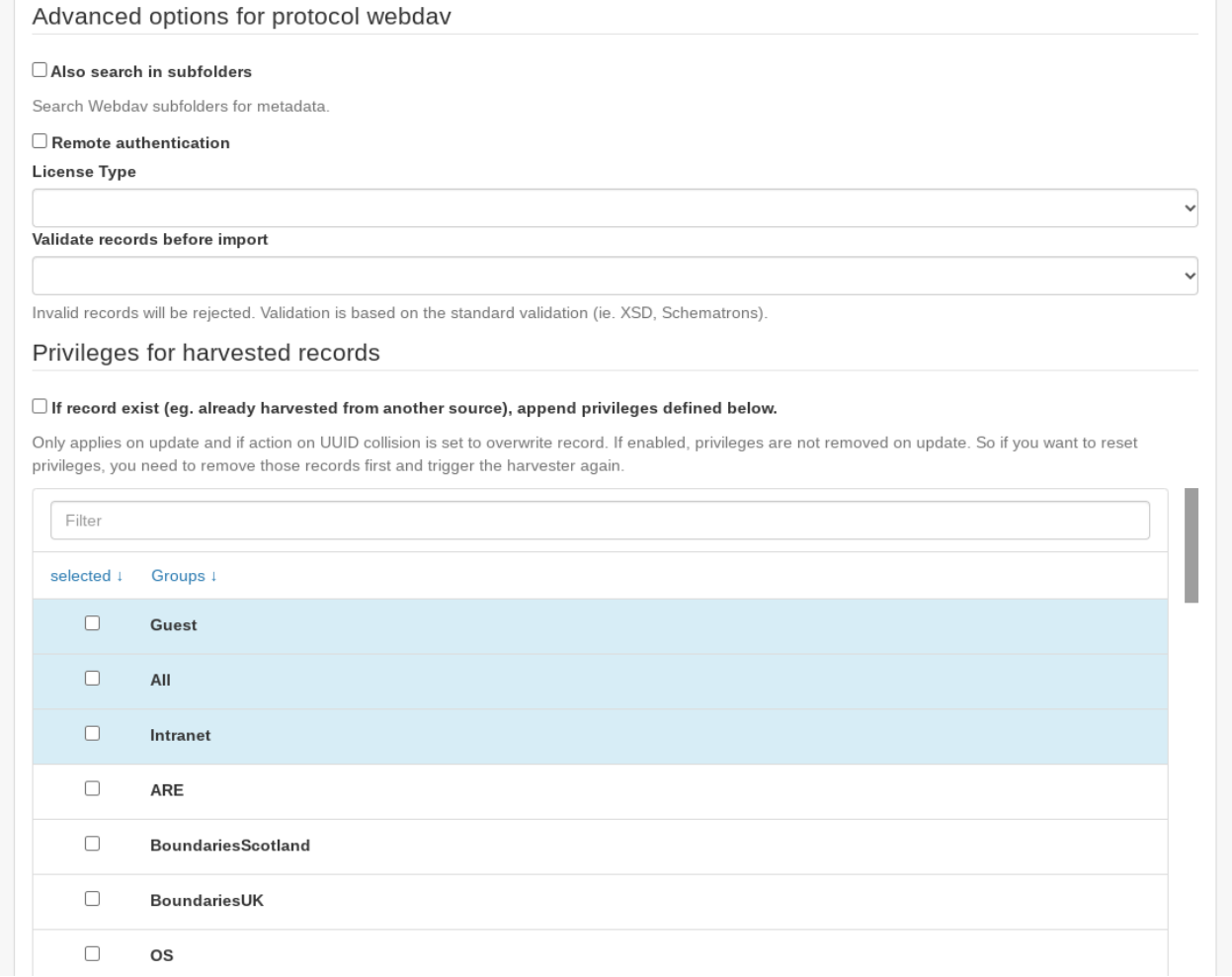


Figure 7.2.2: Common harvester node configuration options, bottom half of screen

Common configuration options are:

- Node name and logo: a unique name and optional logo for this harvesting node
- Group: The group that the harvester should belong to
- User: The user that owns the harvested records
- Schedule: Should the harvester run repeatedly to a schedule or just run the once
- Delete: delete this harvester node **and all related records**
- Remove records: delete records but leave harvester in place
- Save: save changes to harvester configuration
- Harvest: run this harvest
- Action on UUID collision: what action should be taken if the same UUID is present on a record collected by another method. This has the following options:
  - Skip record (default)
  - Overwrite record
  - Create new UUID

- License Type: set the licence under which the harvested records should be added
- Validate records before import: Invalid records will be rejected. Validation is based on the standard validation (ie. XSD, Schematrons). This has the following options:
  - Accept all metadata without validation (this option will import all records regardless of validity)
  - Accept metadata that are XSD valid (this option will cause the harvest to fail on the first invalid record)
  - Accept metadata that are XSD and Schematron valid (this option will cause the harvest to fail on the first invalid record)

For information on the configuration options for the different harvester node types, see the Geonetwork documentation at http://geonetwork-opensource.org/manuals/trunk/eng/users/user-guide/harvesting/index.html

Harvester history

This subsection shows a history of each harvest and the number of records harvested each time the node ran.

Metadata records

This subsection displays a summary of the records. The harvested records can be filtered by Available in, Type of resources, Keywords and Indexing errors.

|image5a|

Figure 7.3.3: Harvested records filters, top half of the screen

|image5b|

Figure 7.3.4: Harvested records filters, bottom half of the screen

The filter facets can be expanded by clicking on the **|hide_harvester_facets_button|** or collapsed by clicking on the **|show_harvester_facets_button|** at the top right corner of the summary box.

A list of the filtered records can be reviewed in the harvested records subsection and filters can be cleared by clicking on the **|remove_harvester_filter_button|**.

Filtered records can be removed in bulk by clicking the **|remove_harvester_records|** button.

Note: this will permanently delete the records from the catalog.

18.2 Harvester Reports

This section allows you to see the harvester history for all nodes and export the results as a CSV file.

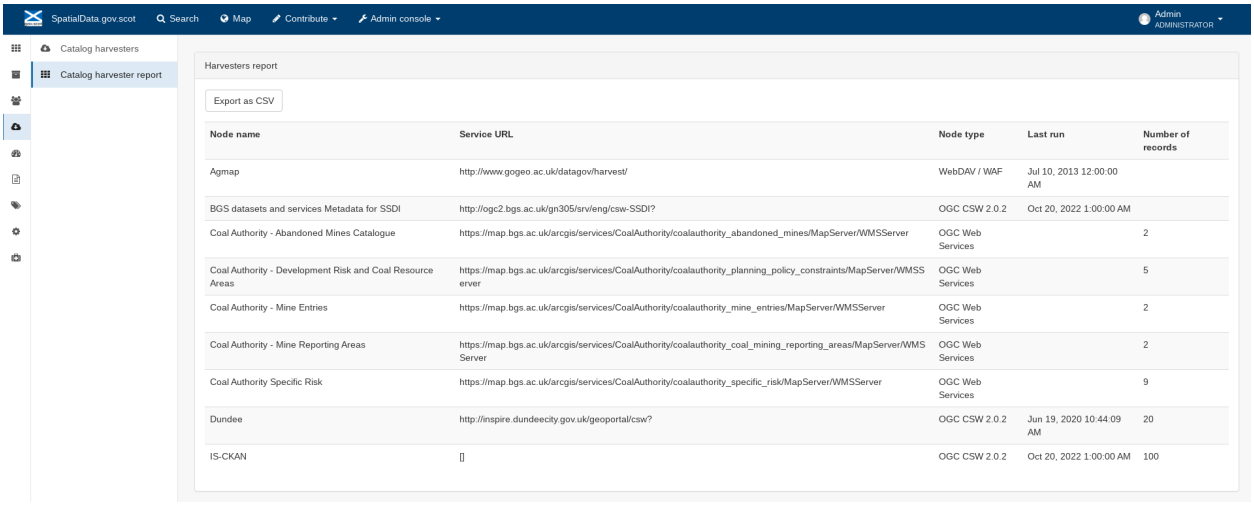


Figure 7.4.1: Exporting harvest history as a CSV

18.3 Feature Harvesters

Here are listed the ongoing and finished jobs for indexing features from remote WFS services. Once indexed, features can then be filtered according to their attributes and the filter applied to the original map layer.

|image6a|

Figure 7.5.1: WFS Indexing Dashboard

To add a new WFS harvester click the **|add_wfs_harvester_button|** button at the top right of the page.

|image6b|

Figure 7.5.2: Adding a WFS harvester

CHAPTER

NINETEEN

STATISTICS AND STATUS

This section provides a range of metrics and information on the health of the Geonetwork installation and the activity on it. It is split into several subsections.

19.1 Status

This subsection should be the first port of call if there are any problems with the catalog. If the catalog is under a low load and is performing optimally then the status page should look like the one below:

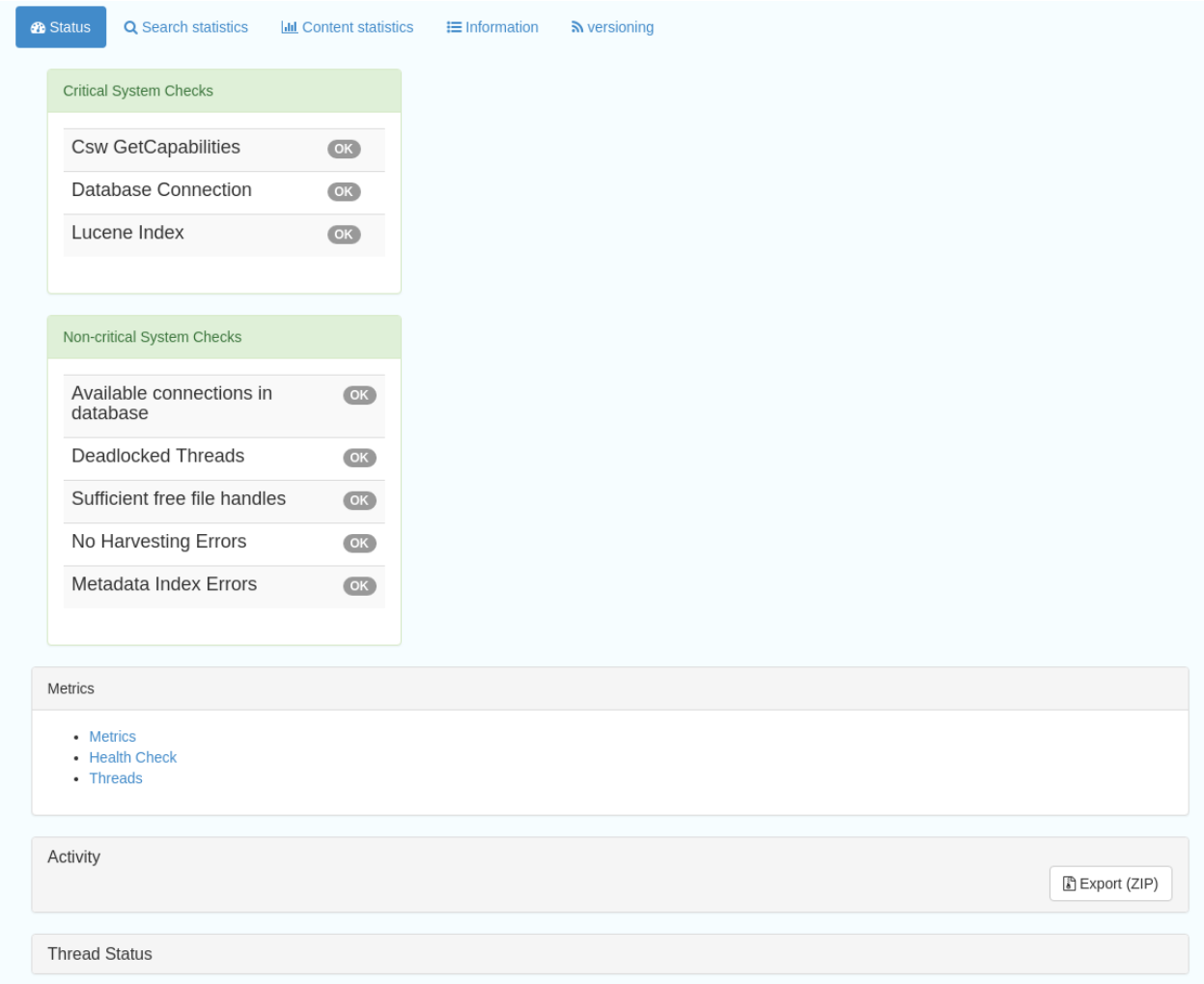


Figure 8.1.1: Status page showing catalog performing optimally

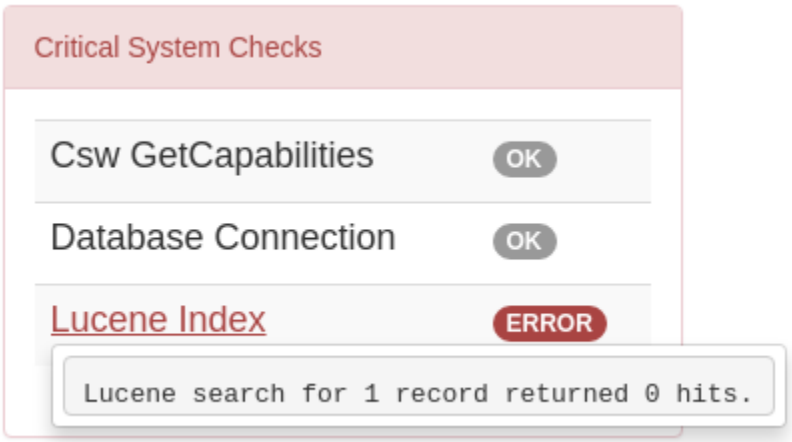


Figure 8.1.2: Status page showing error, with detailed error message accessed by clicking on red link

Report any errors shown here to Astun Technology.

The metrics links provide advanced information on the status of the system and should not generally be needed. The Activity "Export (zip)" provides a log file from the server. This may be requested by Astun Technology support staff. This download could be large and may take some time. The Thread Status link provides advanced information on the java installation, and should not generally be needed.

More detailed metadata indexing errors can be seen on the right hand side of the screen (if there are any). These can be filtered by Error types, Harvested, Indexing errors and Indexing warnings. Filtering by one or more of these criteria will produce a list with the affected records in the bottom half of the page. The filter can be removed by clicking in the search bar.

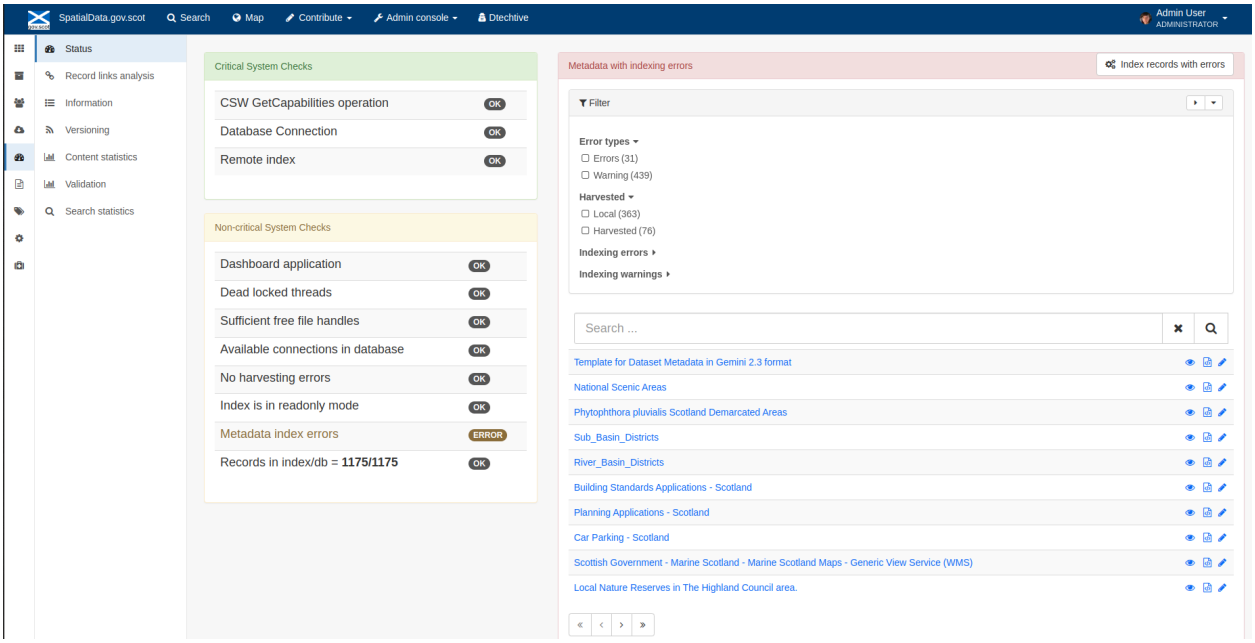


Figure 8.1.3: Status page showing metadata with indexing errors

19.2 Record Links Analysis

This subsection provides a list of all record links analyzed.

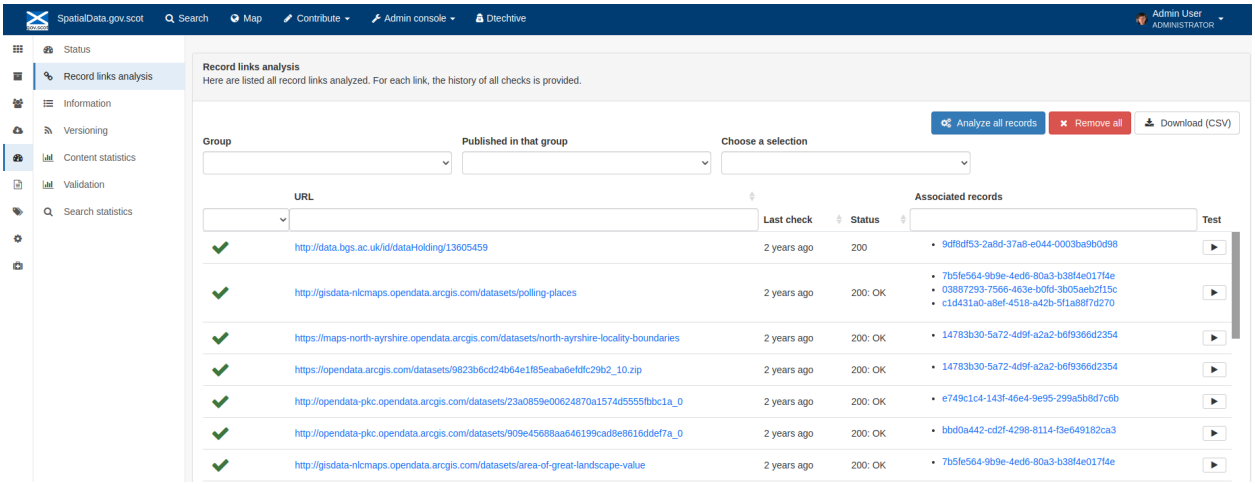


Figure 8.2.1: Record links analysis page

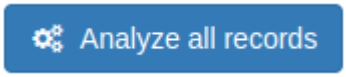
At the top right of the page there are the following options:

- Analyze all records
- Remove all- *this will permanently remove all links and status history* (a confirmation prompt will be displayed)
- Download (CSV)

The links can be filtered by Group, Published in that group (only published records in a group) and Choose a selection (Editor board or Search app selection)

The links can also be sorted by the following criteria (in order from left to right):

- Valid / Invalid / Unknown status first
- URL- a specific URL can be typed or pasted in the search box. Alternatively the links can be sorted alphabetically.
- Last check
- Status
- Associated records- a specific UUID can be typed or pasted in the search bo.x

Links can be tested all at once (by clicking the 

button at the top right) or individually (by clicking the button at the end of the record's row).

19.3 Information

This subsection provides information on the Geonetwork installation on the server. This section is for advanced administrator/system maintainer use.

It comprises the following sections:

- Catalog information- where the files and folders are located on the server
- Database- the connection status and connection string for connecting to the database
- System information- the version of java in use and the amount of memory being consumed
- Index- information about the configuration of the search index

19.4 Versioning

If metadata versioning is enabled on the server, which it is not, by default, then this section provides information about this process. This section is for advanced administrator/system maintainer use only.

19.5 Content Statistics

This subsection provides more information on content searches. The following options are available, for export as CSV:

- Catalog content statistics, such as the number of harvested records, total number of records, number of public records and so on
- Metadata records popularity, showing the most popular records searched for (clicking the blue eye icon to the right of a record will take you to it)
- Best Rated, showing the most highly rated records (if local star ratings are being used)
- Record statistics, this is a dropdown list with a number of available metrics, for example (but not limited to):
  - Year
  - Format
  - INSPIRE theme(s)
  - Contact for the resource

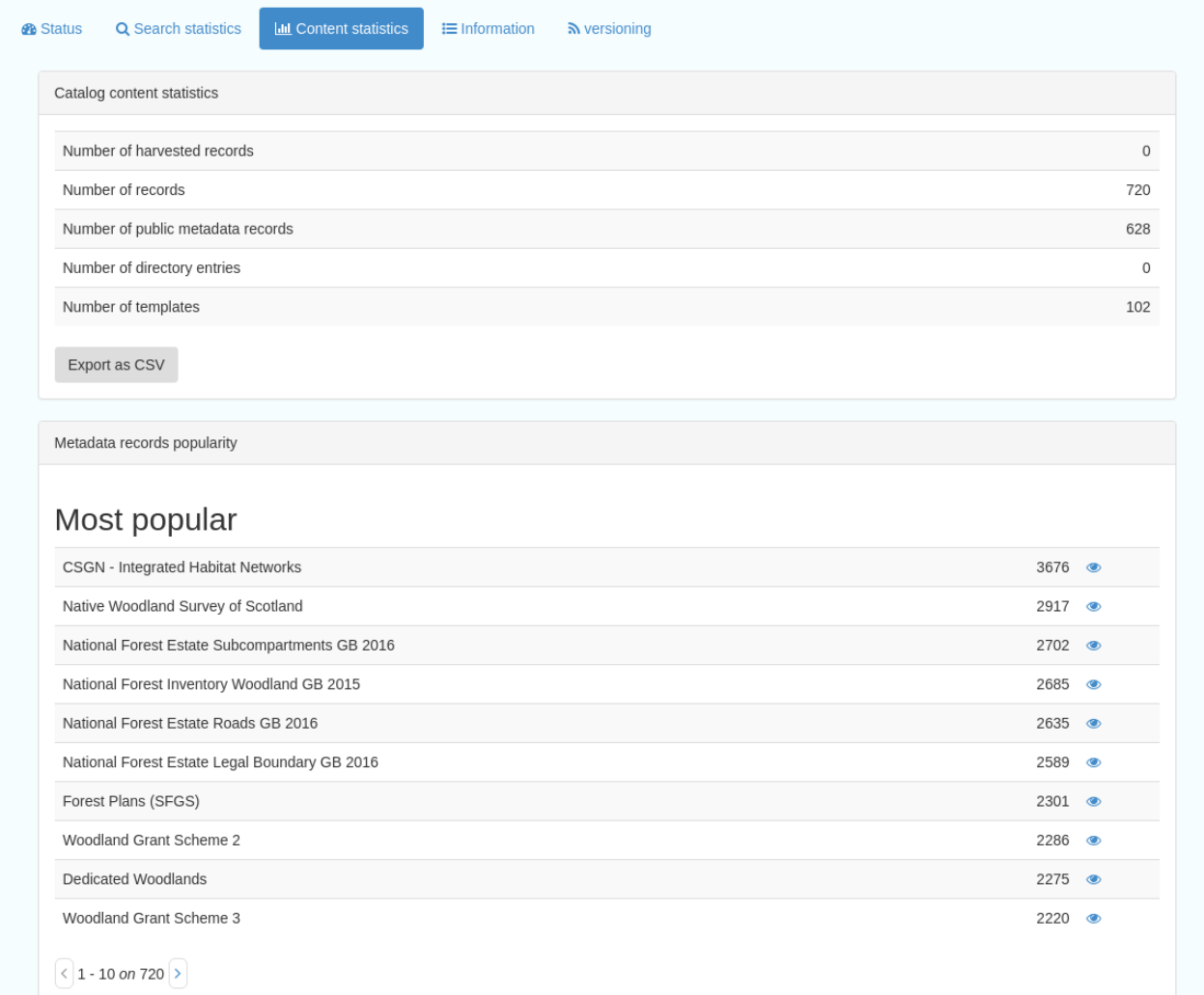


Figure 8.3.1: Catalog content statistics and Most popular records

- A number of pie charts, showing the following metrics, where hovering over a slice will provide the actual number of records:
  - Category
  - Owner
  - Workflow Status
  - Validation Status

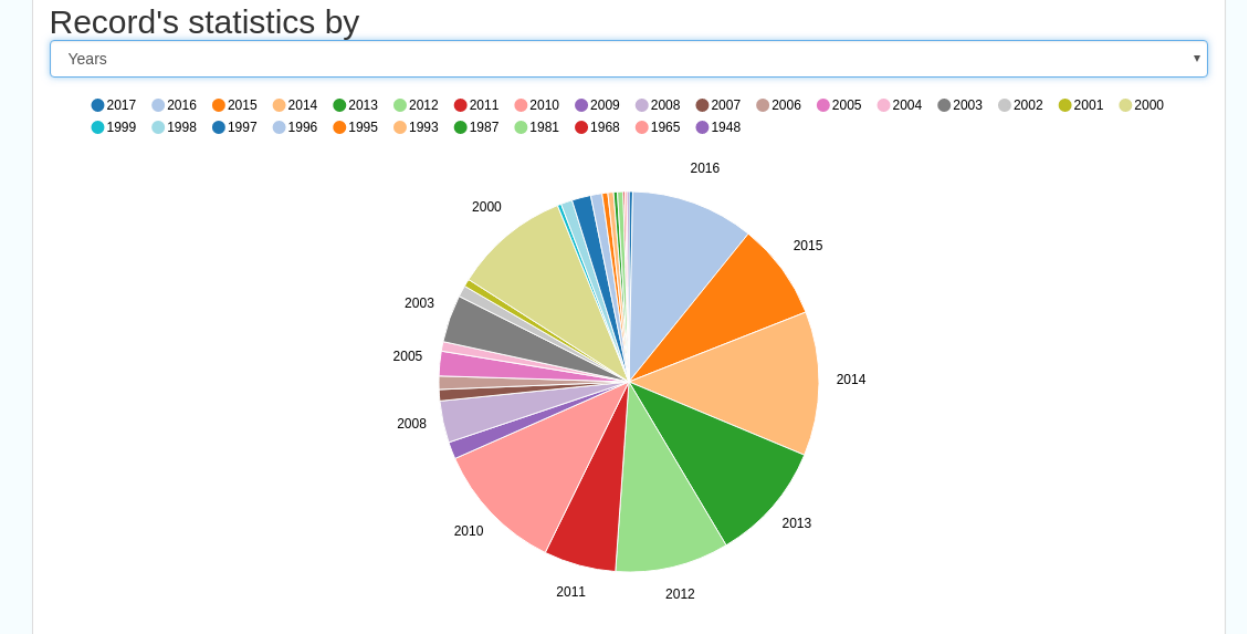


Figure 8.3.2: Record statistics by Year

19.6 Validation

19.7 Search Statistics

This is an extensive subsection showing the following, all additionally available for export as CSV:

- Search statistics, such as the number of catalogue views by day or month
- Statistics for the CSW endpoint
- Number of searches by timeperiod and type, shown as a graph
- Types of services for which a search is triggered, such as export to MEF, RDF, keyword search in portal, shown as a Pie Chart
- IP address for each search
- Search fields and terms
  - This allows the choice of the type of search, which then displays the criteria used and the number of searches
  - Clicking on a criteria shows the breakdown of number of searches per term for that criteria
  - For example, to see a breakdown of search keywords, choose “Search” from the dropdown box and then click the “Keyword” link in the list below (see Figure 4.2.3)

Main statistics

Search statistics

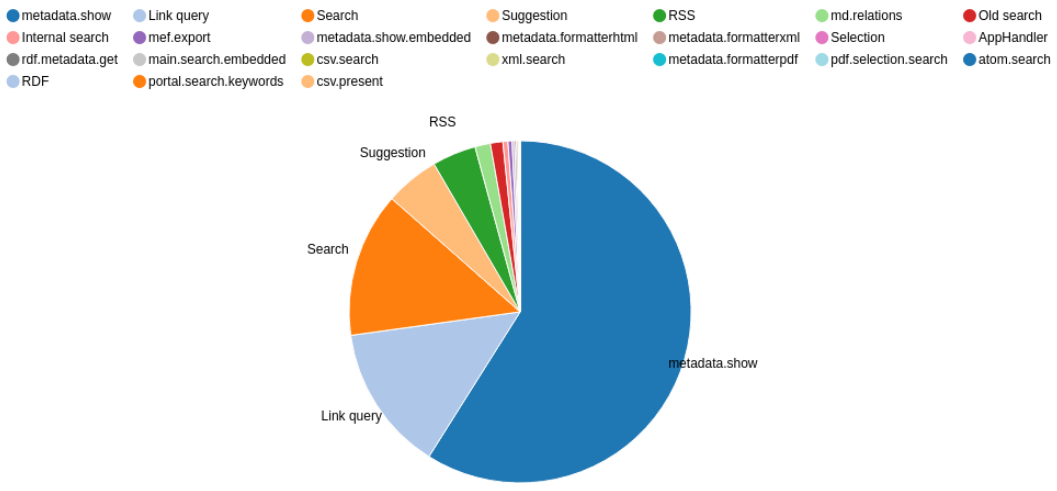
activityDays	613
activityMonths	20
Mean searches by day	41
Mean searches by month	1277
Mean views by day	239
Mean views by month	7334
Total number of searches with no result	2080
Total number of searches	25540

CSW statistics

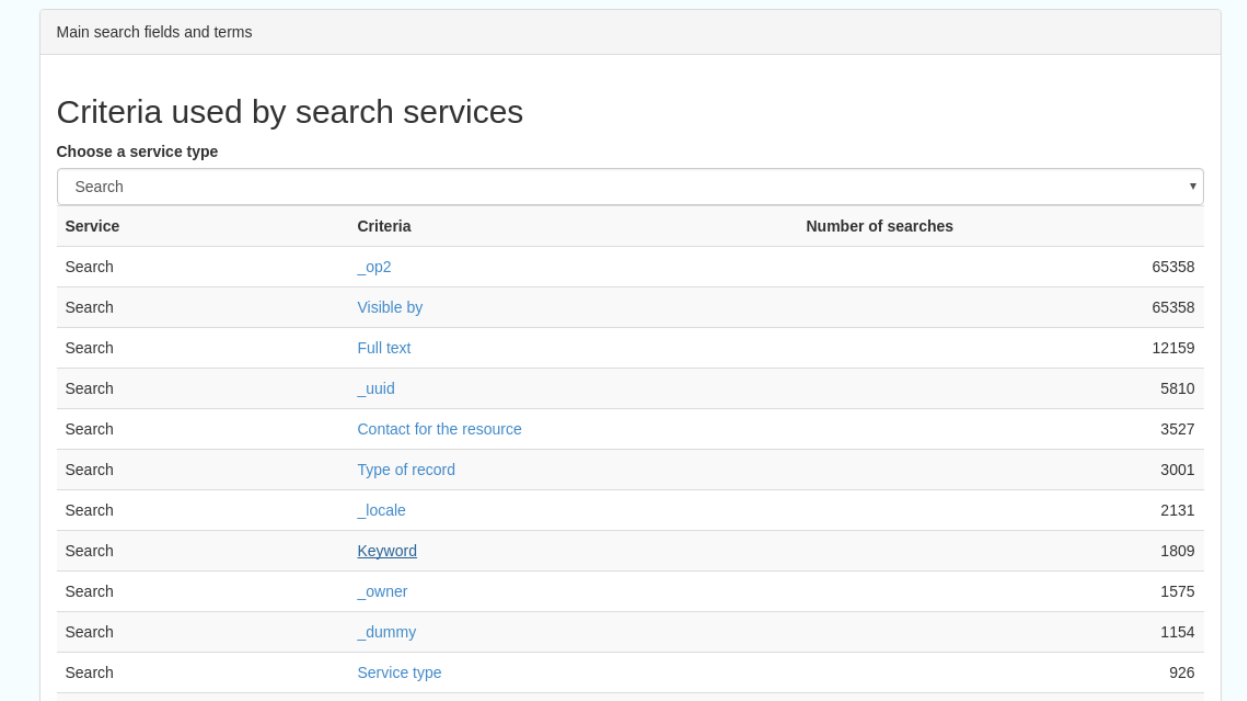
activityDays	613
activityMonths	20
Mean searches by day	0
Mean searches by month	0
Mean views by day	239
Mean views by month	7334
Total number of searches with no result	0
Total number of searches	0

Export as CSV

Type of services used for search



Export as CSV



Figures 8.4.1/2/3: Various elements of the search statistics interface

CHAPTER

TWENTY

REPORTS

This section contains various downloadable reports on user activity in the catalog. Each provide the option to choose a date range, and the option to filter by group. The resulting reports are available for download as a CSV. The following reports are available:

- Updated metadata- can be used to find records that have been, or not been, updated within a specific timeframe
- Internal metadata- can be used to find records that are only available within their group
- Metadata file uploads- shows records for which data has been attached (not used within SSDI)
- Metadata file downloads- shows records for which data has been downloaded (not used within SSDI)
- Users access- shows user names, emails and last login dates

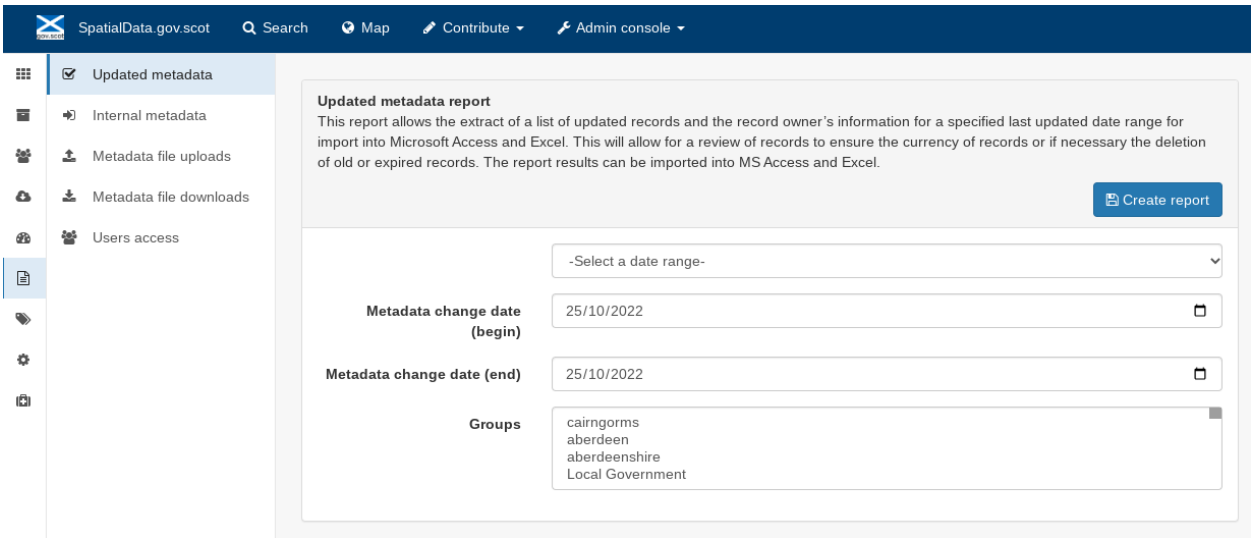


Figure 9.1.1: The reporting section

CHAPTER

TWENTYONE

CLASSIFICATION SYSTEMS

This section provides access to the Thesauri and other Categories used within the catalog. It is split into two subsections.

21.1 Thesaurus

Thesauri in SKOS format (XML or RDF extensions) can be managed or added here. It is also possible to interrogate the existing thesauri loaded into the catalog.

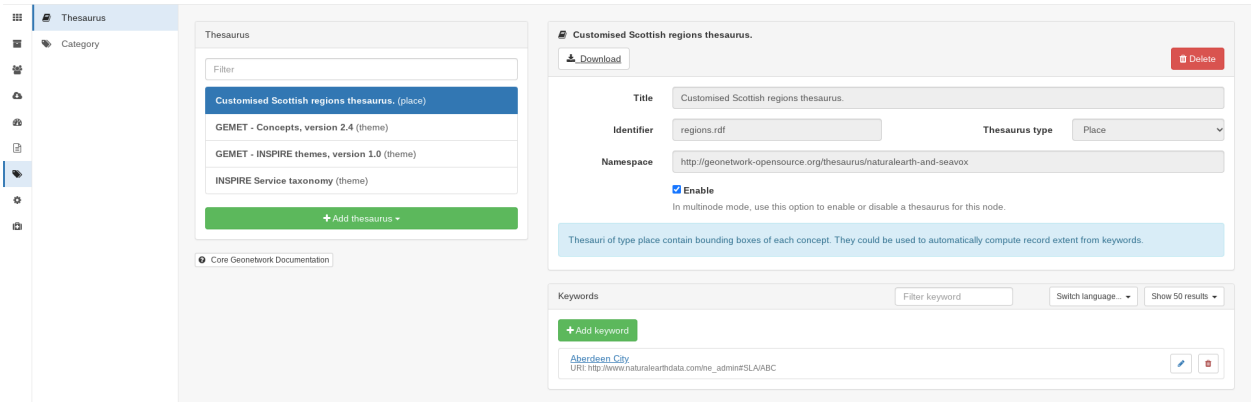


Figure 10.1.1: The thesaurus subsection showing the customised Scottish Regions thesaurus

Selecting a thesaurus from the list provides further information about it. **The settings here should not be changed as they will affect the working of the catalog.**

It is possible to add additional thesauri by clicking the "Add thesaurus" link. The options are as follows:

- From registry
- From local file - upload a thesaurus in SKOS format (XML or RDF extensions) from your local hard drive
- From URL - provide a link to a compatible thesaurus online
- New thesaurus - build one from scratch in Geonetwork

21.2 Categories

This subsection lists the categories that records can be added to, and provides the option to add new categories or delete existing ones.

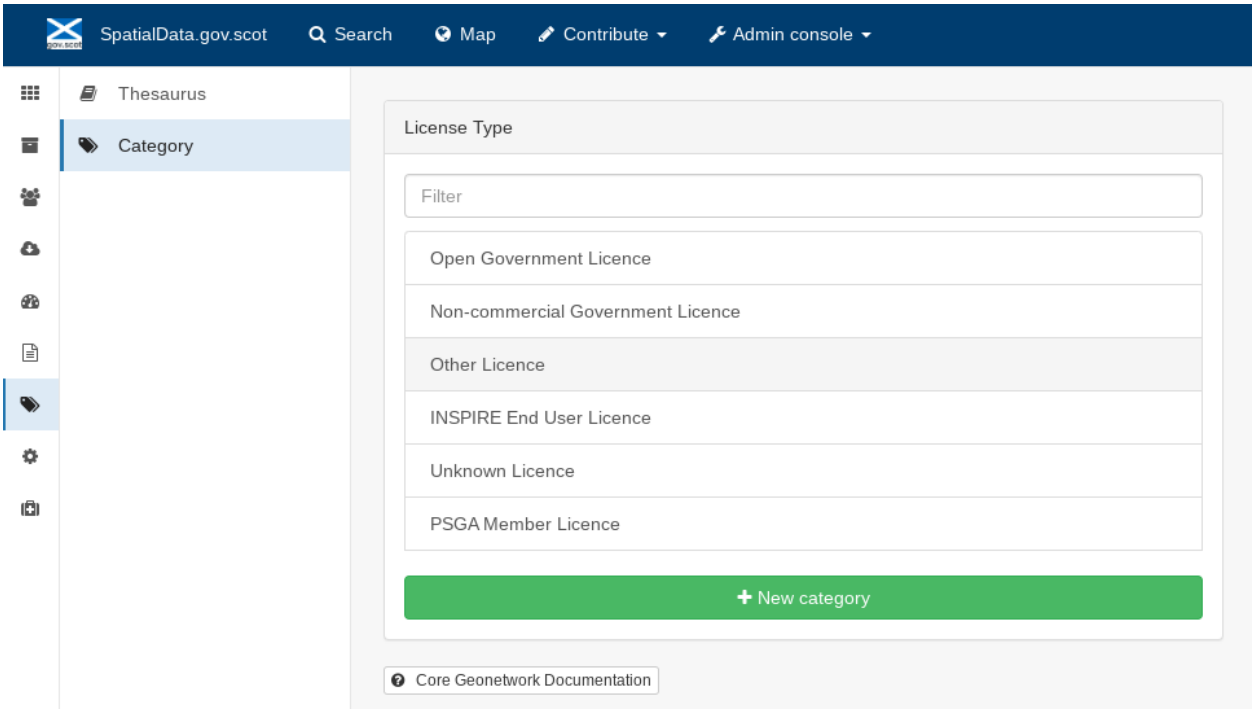


Figure 10.2.1: Category list

Selecting a category from the list brings up a dialogue where it's display name can be edited in each of the languages enabled in the catalogue, along with the options to save changes or delete the category.

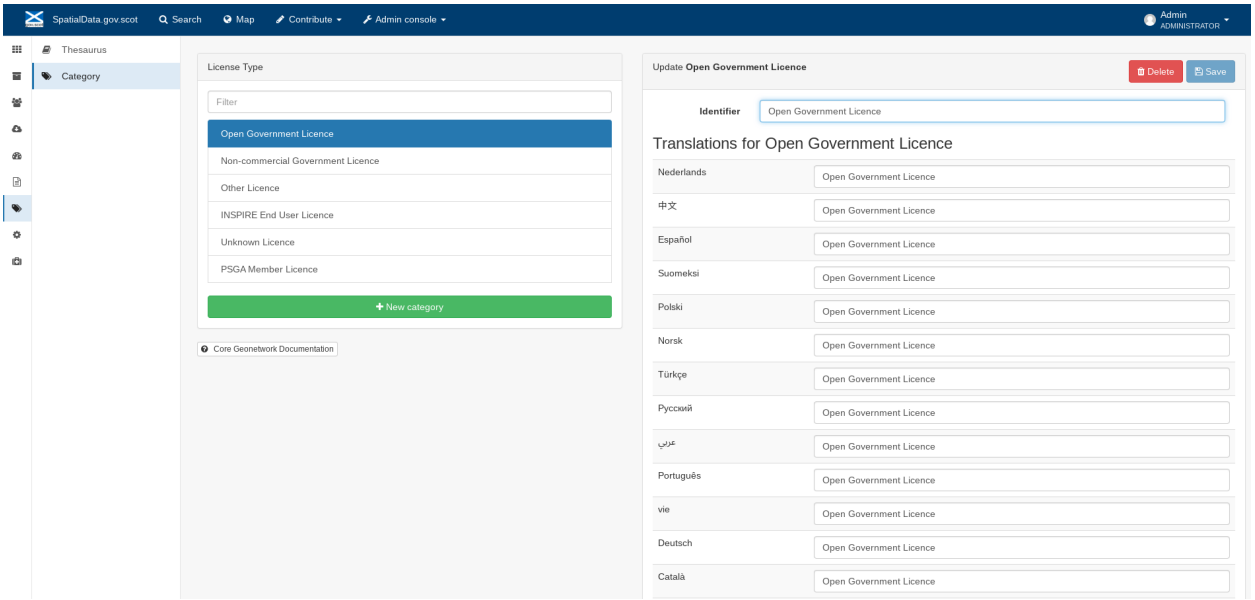


Figure 10.2.2: Selecting a category and displaying additional options

To add a new category, click the "New category" button shown in Figure 10.2.1 above. Add an unique name for the

category and save it. To change it's display name in any of the available languages, select it from the category list and edit as shown in Figure 10.2.2 above.

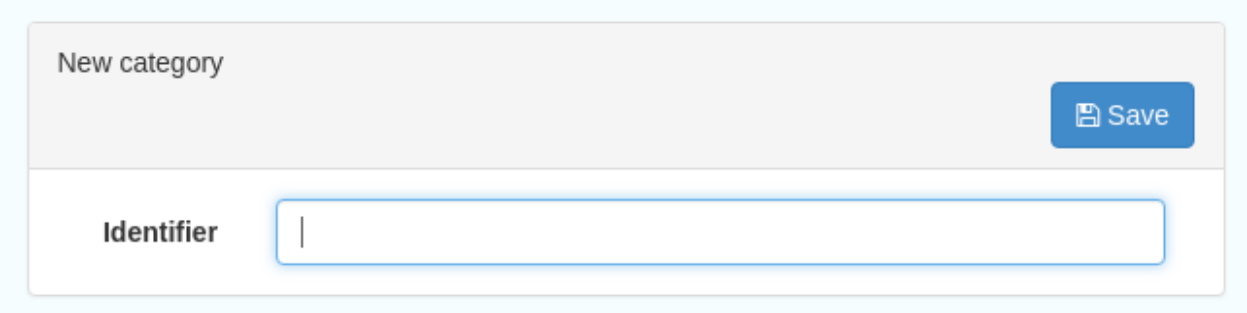


Figure 10.2.3: Adding a new category dialogue window

CHAPTER

TWENTYTWO

USERS AND GROUPS

This section is where existing users and groups are managed, and new ones are added. There are two subsections, described below.

22.1 Manage groups

This subsection allows you to list and edit the existing groups in the catalog, and add new ones. Groups are listed on the left, and selecting a group brings up additional options, shown below, with the option to save any changes or delete this group.

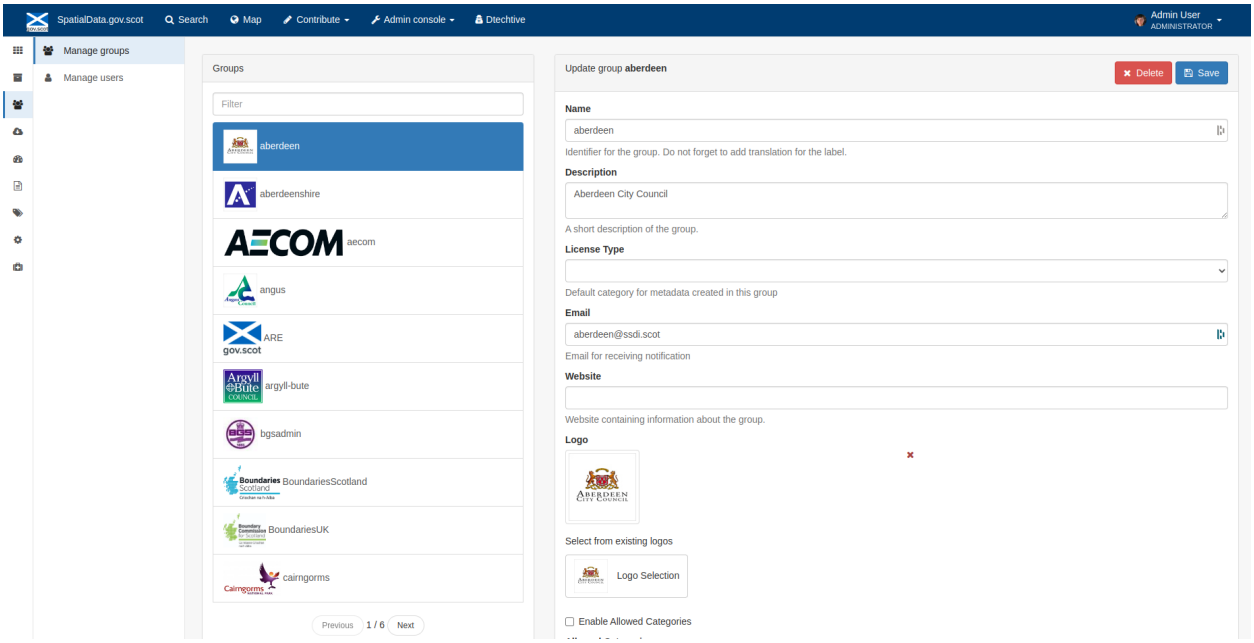


Figure 11.1.1: The groups list and top half of the groups editing interface

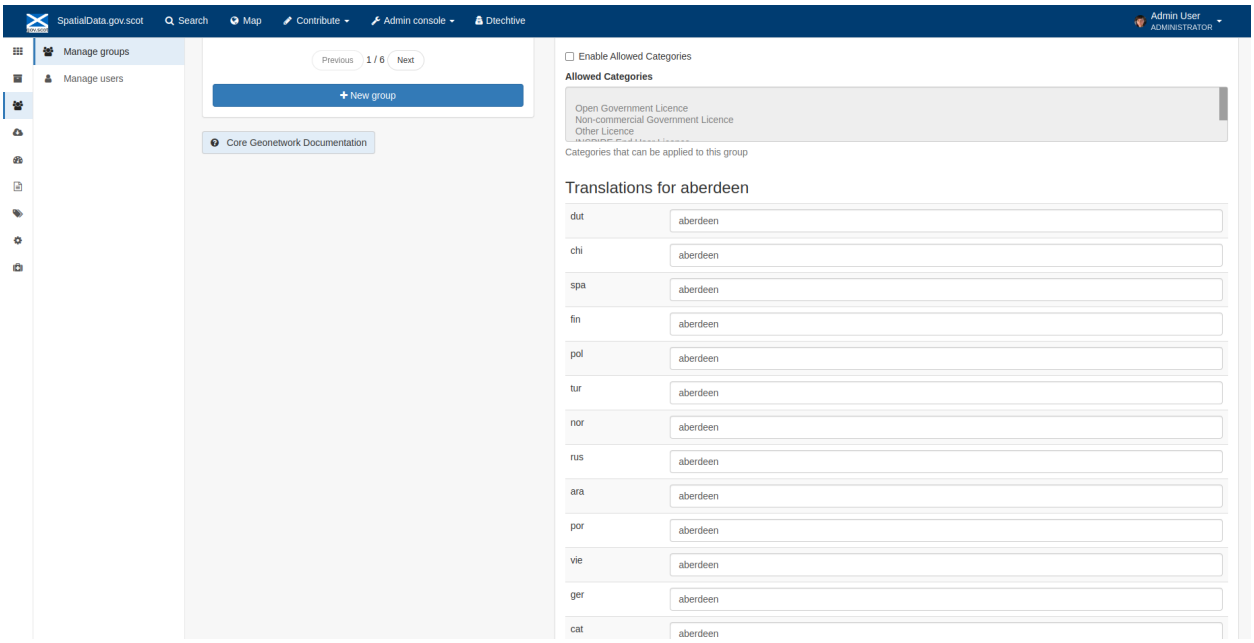


Figure 11.1.2: The middle section of the groups editing interface

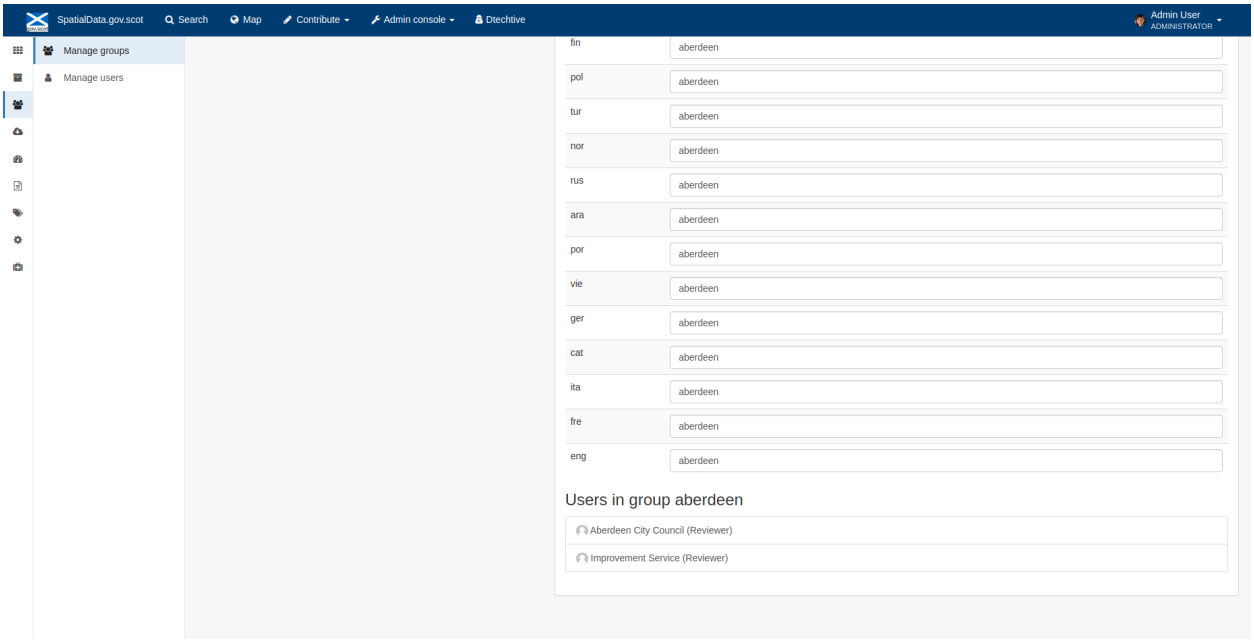


Figure 11.1.3: The lower section of the groups editing interface (intermediate section on translations for this group name not shown)

To add a new group, click the blue "New group" button below the list. This brings up the same dialogue shown in figures 11.1.1-11.1.3.

22.2 Manage Users

This subsection allows you to list and edit the existing users in the catalogue, and add new ones. Users are listed on the left, and selecting a user brings up additional options, shown below, with the option to save any changes or delete this user. For exsiting users there is also the option to reset the password.

The settings for editing or creating a user are as follows:

- Enable (default is yes)- allow this user to log in, or not
- User name (mandatory)- the name the user should use to log in
- Password (mandatory, not shown for existing users)
- Name (mandatory)
- Surname (mandatory)
- Email (mandatory)
- Organisation (optional)
- Address fields (optional)
- Select user groups per profile fields:
  - Is an administrator (default is no)- if checked the user will be a full administrator for the whole catalogue with full access to all functionality for all groups
  - Profiles per group- if not a full administrator then the user needs to be assigned at least one role or profile within the catalogue. Note that a user can be part of multiple groups and have different profiles per group
    - Registered User: can download protected data
    - Editor: has rights to create/delete/edit metadata within their group
    - Reviewer: has rights to authorise publication of metadata within their own group
    - User administrator: has rights to administer users, and create/delete/edit metadata within their group
- Records owned by this user (if any)

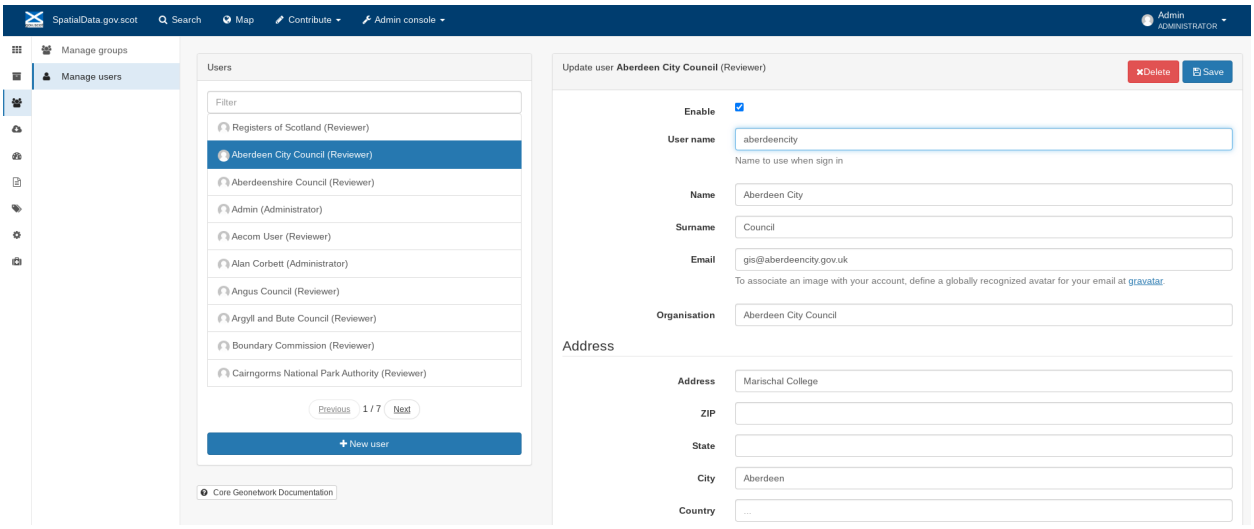


Figure 11.2.1: The users list and top section of user editing interface

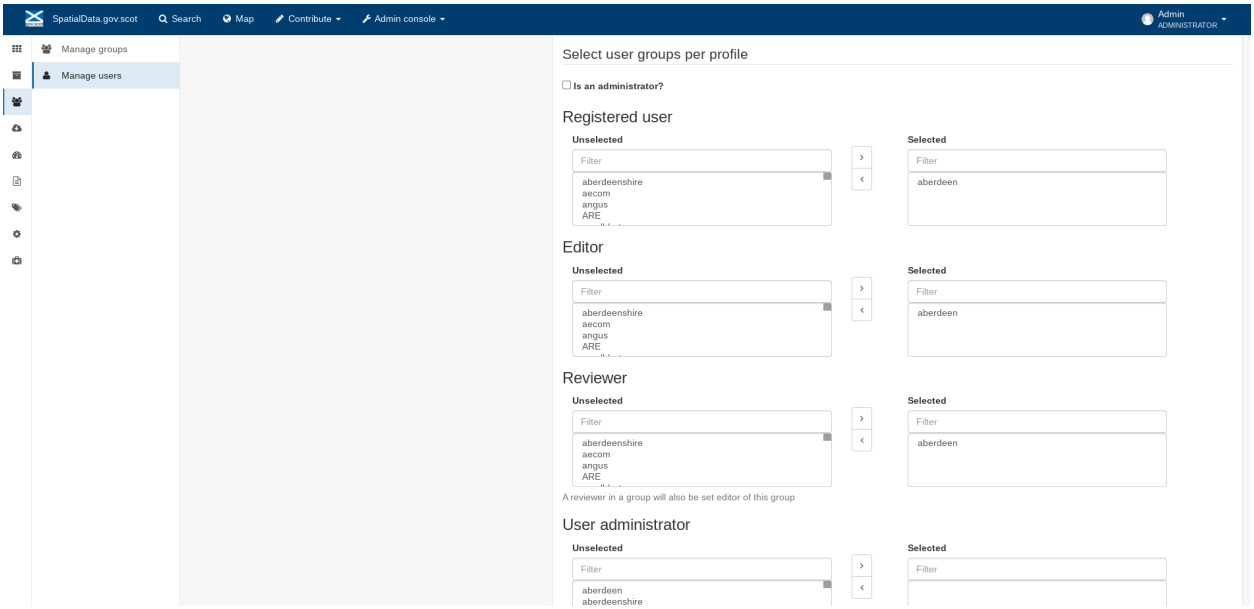


Figure 11.2.2: The middle section of the user editing interface

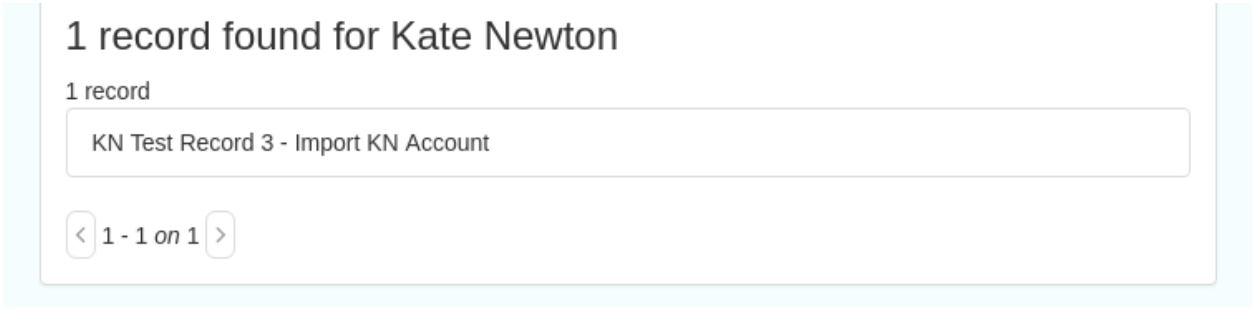


Figure 11.2.3: The lower section of the user editing interface

CHAPTER

TWENTYTHREE

SETTINGS

This section should be used only by advanced administrators and system maintainers. This section is where the main configuration of for the installation is set up. It contains a number of subsections, as described below, but in general settings should only be changed by experienced staff as they can have an adverse effect on the running of the site.

23.1 Settings

The settings subsection provides access to the main configuration for the installation.

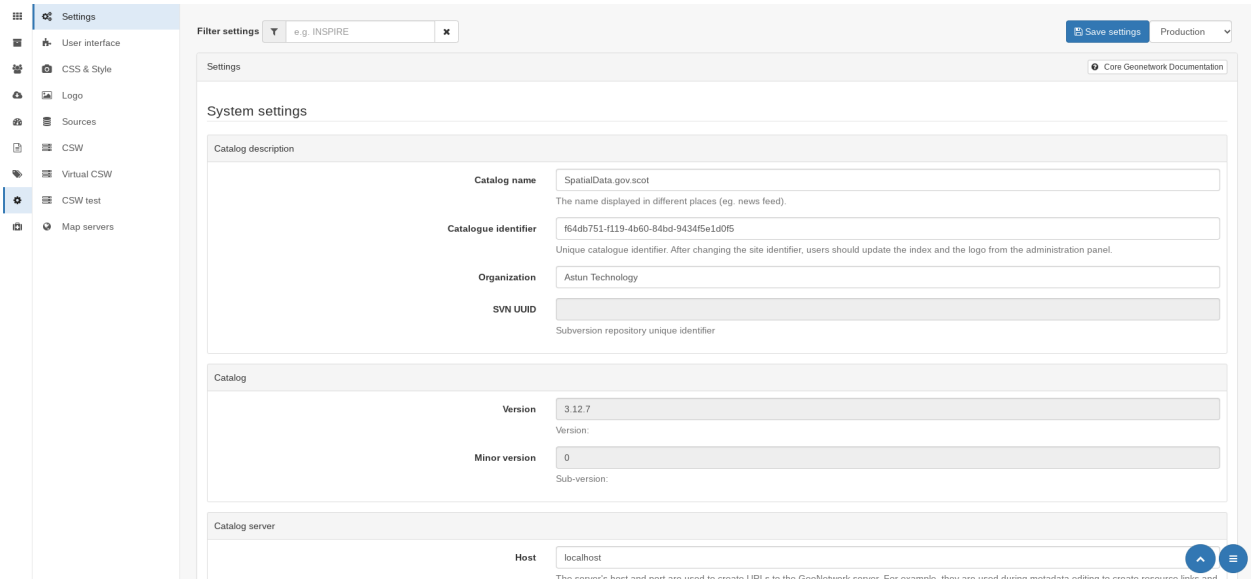


Figure 12.1.1: The settings panel

The various elements are described in detail in the Geonetwork documentation at http://geonetwork-opensource.org/manuals/trunk/eng/users/administrator-guide/configuring-the-catalog/index.html so not all elements are described below, but there are some sections that may be useful:

- Log levels- there are two of these, accessed via dropdown lists. The first is at the top of the settings panel, next to the "Save settings" button. The second is in the Catalog server subsection. The default for both is "Production" and this level should only be changed if increased logging is specifically requested. In that case, change to "Dev" and save settings, but remember to set it back to "Production" for normal use!
- Catalog description- the Catalog name and Organisation are used throughout the catalogue and can be changed as required

  - Organization- this is also used throughout the catalog and can be changed as required

- Catalog- shows the version of Geonetwork in use
- Catalog server- shows the URL and protocol (http or https) being used. **Changing these values will trigger a change to internal URLs within the metadata records**
- Metadata Search Results- limits how many records can be selected in a single operation. **Increasing this value may have a negative impact on the performance of the server**
- Catalog Service for the Web (CSW)- should this be enabled (default is yes). **Note that there is a known issue where the option to set a contact to be used for GetCapabilities does not work. This is being investigated, and can be set elsewhere**. In general the default settings for this section should be used.
- User self-registration- if this option is set (default is no) then visitors to the catalogue can register as users (with the Registered User profile)
- User feedback- deprecated in version 3.0.0 onwards
- Search statistics- if enabled (default is yes) then Geonetwork will save statistics on searches in the database
- INSPIRE Directive configuration- this section enables INSPIRE options in the CSW response from the catalogue and enables the INSPIRE search options in the advanced search panel.
- Harvesters- allow editing on harvested records- if this is set (default is no) then records harvested from a remote location can be edited. **Note that, if set, any changes would be overwritten by subsequent harvests**
- Harvester- this section contains settings to alert if a harvest has succeeded or failed. It is not configured by default
- Metadata configuration- this section contains settings on which views are available, which is the default, and whether group logos should be used for records. The default values are generally sufficient
- Metadata workflow- this section includes sections on the publication of invalid metadata. If the publication of invalid metadata is disabled, it is also possible to automatically set the status of invalid records to unpublished, and to force validation when a metadata record is saved.

The remaining settings are generally only configured on installation and should only be changed by experienced administrators or system maintainers.

23.2 Logo

This subsection is where logos are uploaded and/or deleted, and where the main catalog logo is set. New logos can be uploaded using the green "Choose or drop images here" button, and the current catalog logo is shown on the left. For logos that have been uploaded, there are options (icons, from left to right) to set as the catalog logo, set as the favicon, or delete.

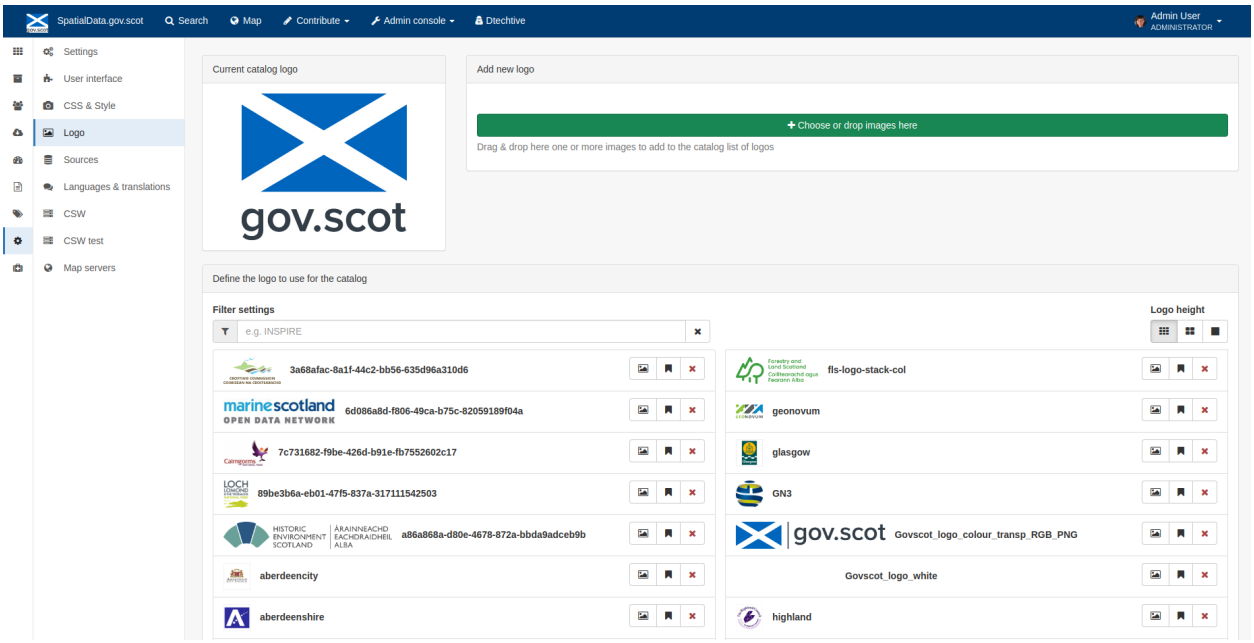


Figure 12.2.1: The logo configuration interface

23.3 Sources

This subsection is only used when a number of different sources are used for loading the data, such as harvesting nodes.

23.4 CSW

This subsection provides more detailed options for configuring the CSW service for the catalogue. In general the default options are sufficient.

The Contact setting allows the choice of a user within the catalogue to populate the contact information in the CSW GetCapabilities request. **A specific user "Metadata Contact", has been set up for this purpose.**

The CSW Service information setting allows the configuration of some of the GetCapabilities elements, such as the Title, Abstract and so on. Fields are selected using a dropdown list, the language is chosen (default is English), and then the Value for the given setting can be added.

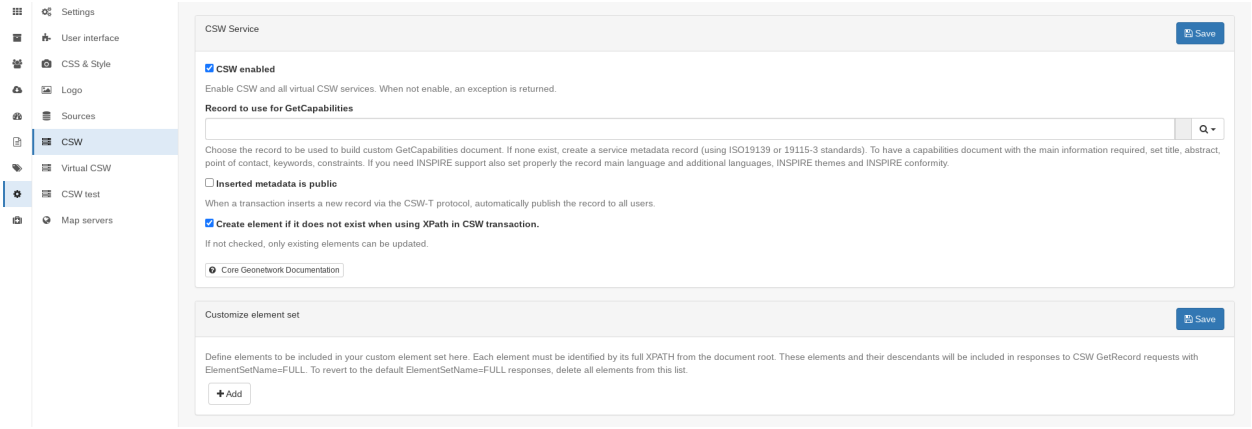


Figure 12.3.1: The CSW settings interface

23.5 Virtual CSW

This subsection allows the configuration of Virtual CSW endpoints. These allow for different CSW URLs to be used within the catalogue, such as for different groups or metadata categories.

To configure a new Virtual CSW endpoint, click the blue "New Virtual CSW" button and then configure the following settings:

- Name- This will be used as the URL endpoint for the virtual CSW. **This must begin with csw-**
- Description
- Filters/Query- the filter that should be used to decide on the records that should be published under this endpoint. Choose from the dropdown list, or use the advanced query option. The figure below shows an example endpoint for records belonging to the Aberdeen group

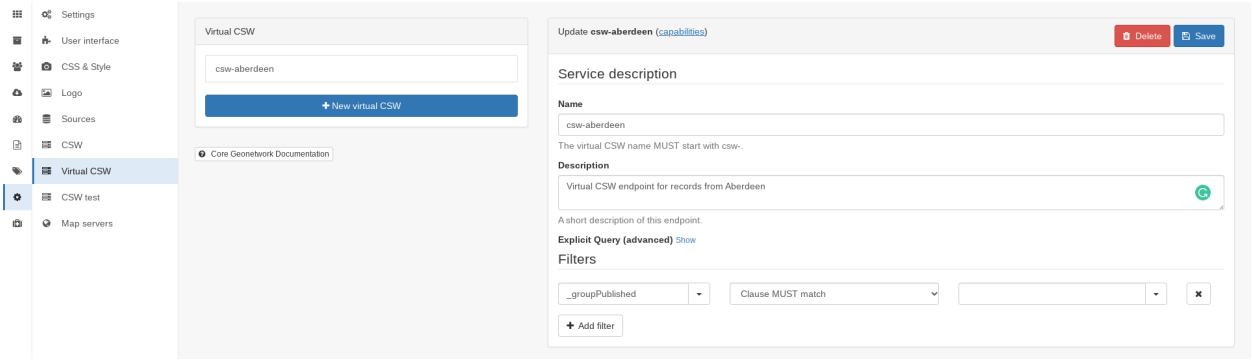


Figure 12.4.1: Virtual CSW endpoint set up for Aberdeen group

Once a virtual endpoint has been saved, it's capabilities can be checked using the link shown below in figure 12.5.1

Note that the default contact information, as configured in the CSW subsection, will be used for the GetCapabilities request

23.6 CSW test

This subsection allows you to test various CSW requests on the standard endpoints or any virtual endpoints configured. The endpoints are displayed as radio boxes and the available requests are accessible from a dropdown list. Where it is necessary to adjust a parameter, such as a search term or record ID, this can be done in the XML section. To run the request click the green "Send CSW request" button. The response will appear below.

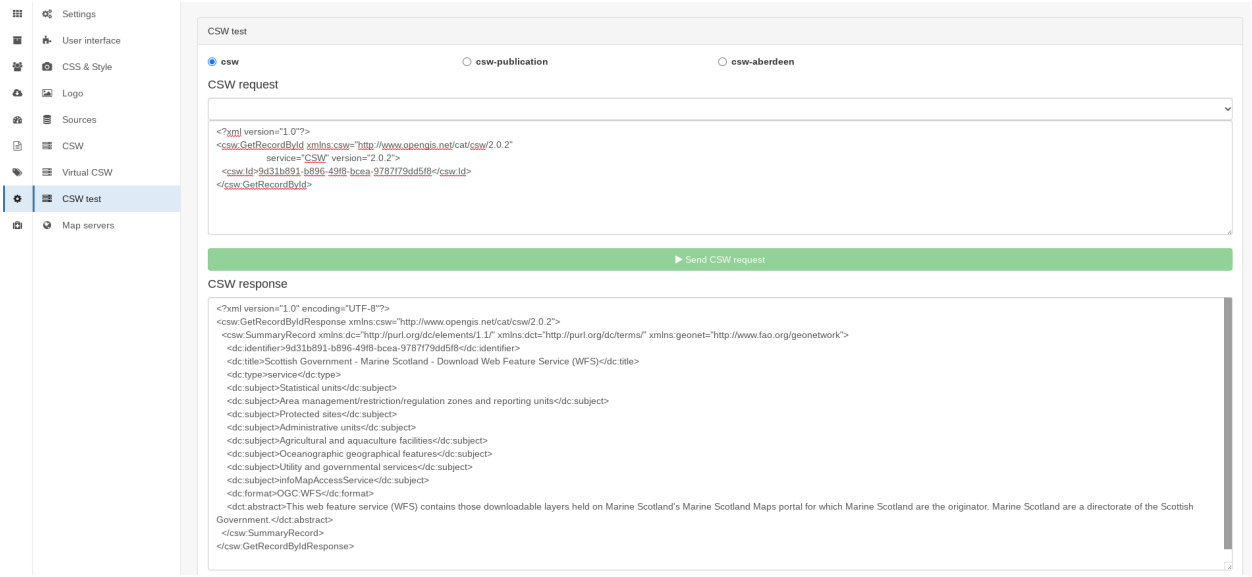


Figure 12.5.1: Results of CSW "GetRecordById" request to the standard catalogue CSW endpoint, for record with ID 9d31b891-b896-49f8-bcea-9787f79dd5f8

23.7 Map servers

This subsection allows you to set up the catalogue as an OGC publisher for WMS/WFS/WCS. In order to configure this section a Geoserver or Mapserver instance must be installed on the server. **Not currently implemented in this installation.**

CHAPTER

TWENTYFOUR

TOOLS

This section contains some tools that can be run when maintenance is needed on the server. The subsections are as follows:

24.1 Catalogue admin tools

In general it is not necessary to run these tools unless transferring a large number of metadata records, changing the catalog's appearance, or if unexpected search results are reported. The tools are as follows:

- Reindex records- if changes have been made to the database. **Note: While rebuilding index, the search may return incomplete results and the CSW GetRecords operation is disabled**
- Delete index and reindex
- Commit index changes- use only if indexing task is hanging
- Delete and create data index- completely remove the index containing data and recreate it
- Clear XLink cache- if directories are added or changes have been made to the catalog that would affect the structure of xlinks (such as to the URL or protocol), clear the cache
- Clear Formatter cache- if changes have been made to the catalog's display (schematron views, or text strings), clear the cache
- Clear JS & CSS cache- if changes have been made to the catalog's JS or CSS, clear the cache
- Clear translation packs cache- if changes have been made to the catalog's JSON translation files of the Javascript application in catalog/locale, database translations or schema JSON translations, clear the cache
- API doc & test- documentation and testing page for the GeoNetwork API

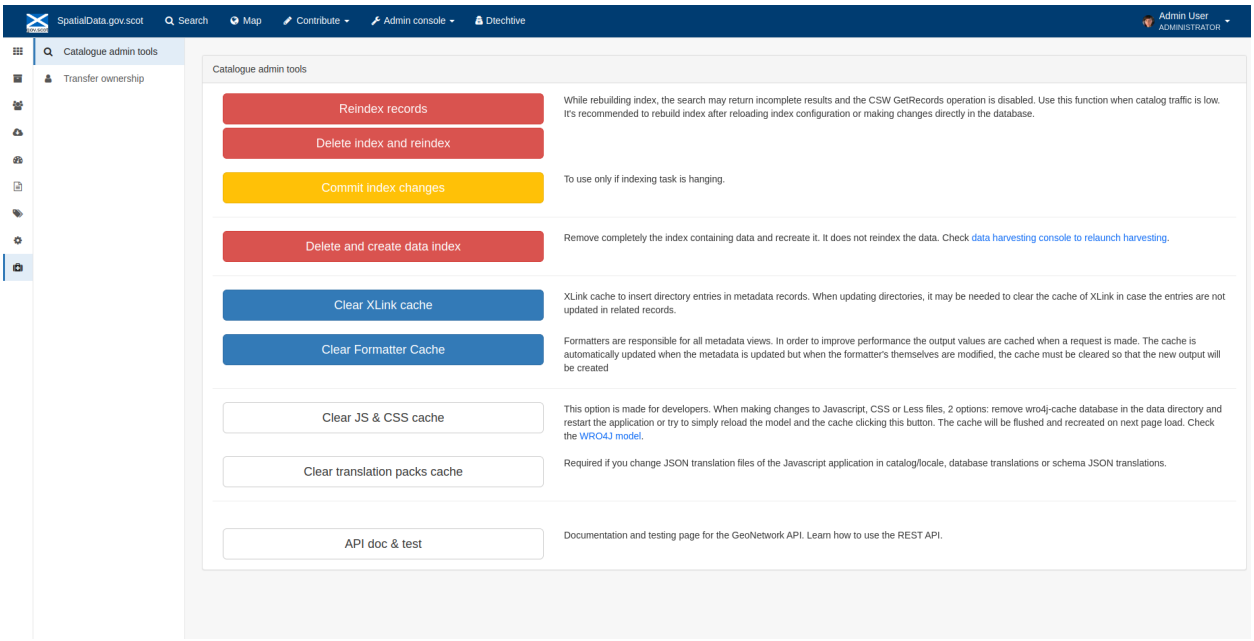


Figure 13.1.1: The index admin interface

24.2 Transfer ownership

This subsection allows you to change the owner (user) of a set of records. Choose the user from the dropdown list, noting that this list contains only users with profiles of editor and above.

The "Target group and editor" dropdown list will then show all users with editor profile and above, and additionally full administrators for the catalog. Select the appropriate editor and then click the

button.

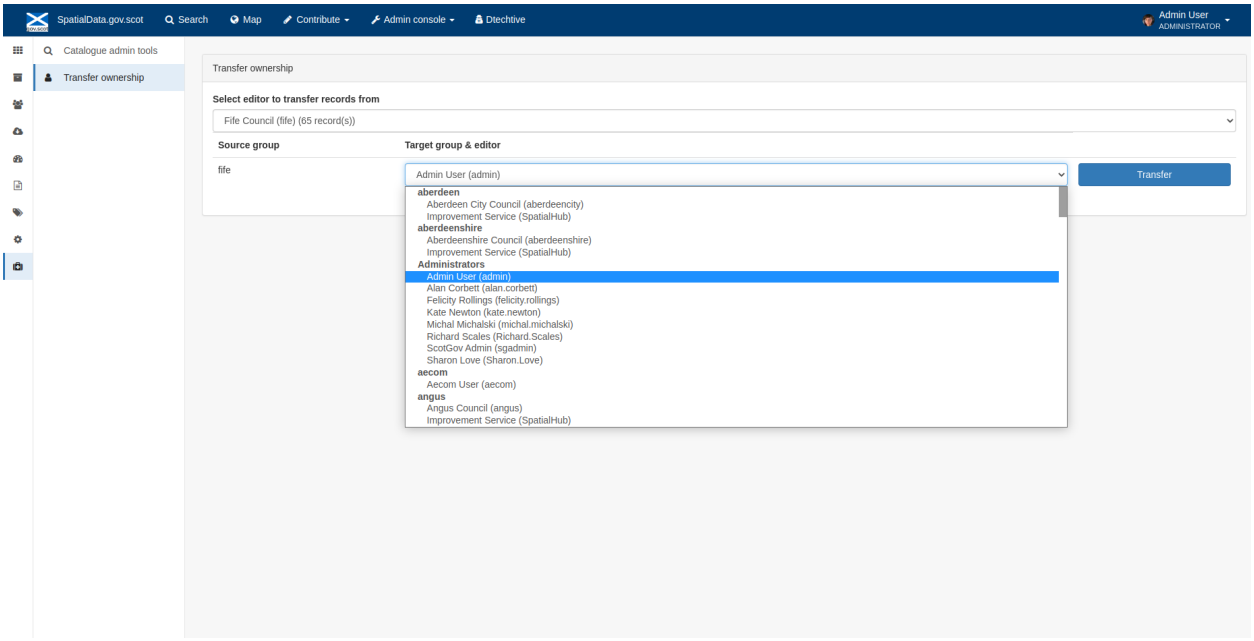


Figure 13.2.1: The transfer ownership interface, configured for transferring records currently owned by the Fife Council user to the Admin user.

Note that changing the ownership of a record applies only to users and does not affect group privileges. This tool is also available in the Search panel and the Editor board as one of the available actions for selected results.

CHAPTER

TWENTYFIVE

EDITING ONLINE DOCUMENTATION

The source for the online documentation is written in ReStructuredText (rst) syntax and stored in a public repository on GitHub at https://github.com/AstunTechnology/ssdidocs. Every time this source documentation is updated, it is regenerated into html by ReadTheDocs and the generated version is available at http://scottish-sdi-metadata-portal.readthedocs.io/.

There are two sections to the documentation at present, represented by two separate rst files:

- User guidance https://github.com/AstunTechnology/ssdidocs/blob/master/docs/ssdi_guidance.rst
- Admin guidance https://github.com/AstunTechnology/ssdidocs/blob/master/docs/ssdi_adminguidance.rst

Editing the documentation will require a GitHub account.

25.1 ReStructured Text Syntax

ReStructured Text documents should be written in a text editor rather than a word processing application

A guide to syntax can be found at http://docutils.sourceforge.net/docs/user/rst/quickref.html

An online editor and previewer can be found at http://rst.ninjs.org/

25.2 Edit on github

The documentation can be edited online by either clicking the "Edit on GitHub" link, or navigating to the URLs given above. Note that the procedure outlined here seems complicated but in most cases it's a button-pressing exercise.

Click the edit icon for the document you wish to edit.

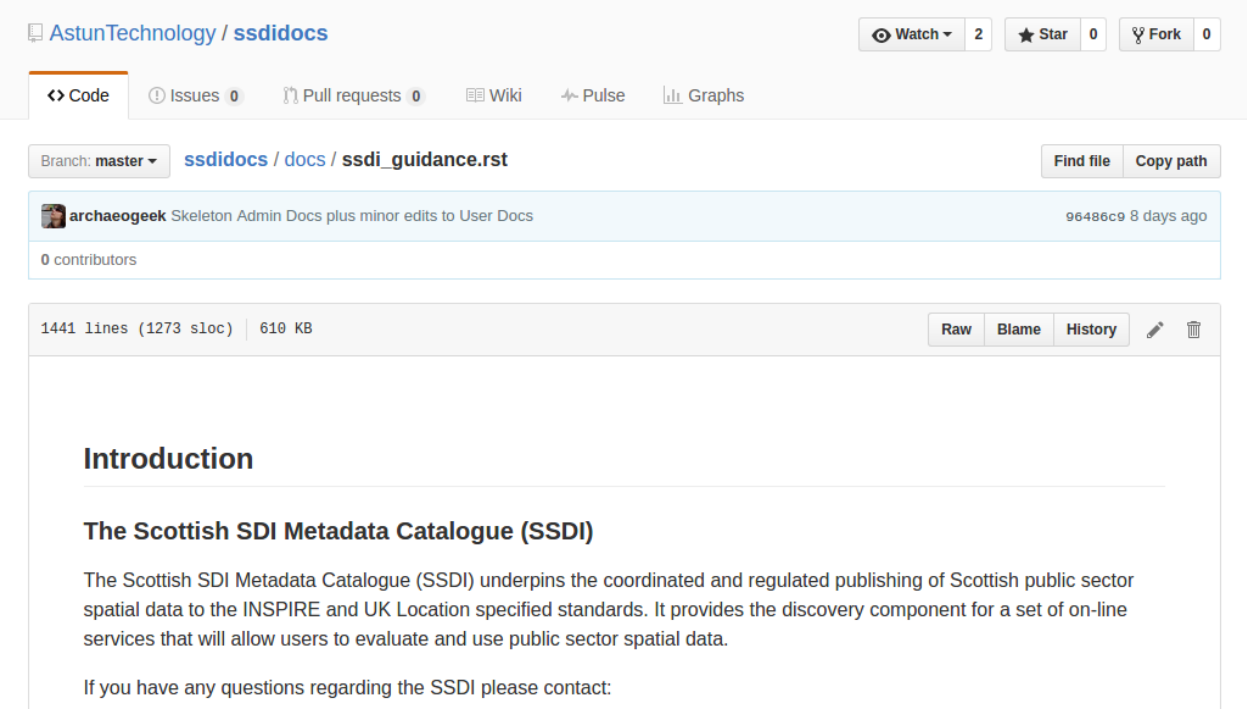


Figure 14.1.1.: Editing in GitHub

The editing interface has two tabs, one for editing and one for previewing changes. You can use shortcuts like ctrl-f to find text in the document that you wish to change. Check your changes using the preview tab, and then in the "Propose file change" section briefly outline your change.

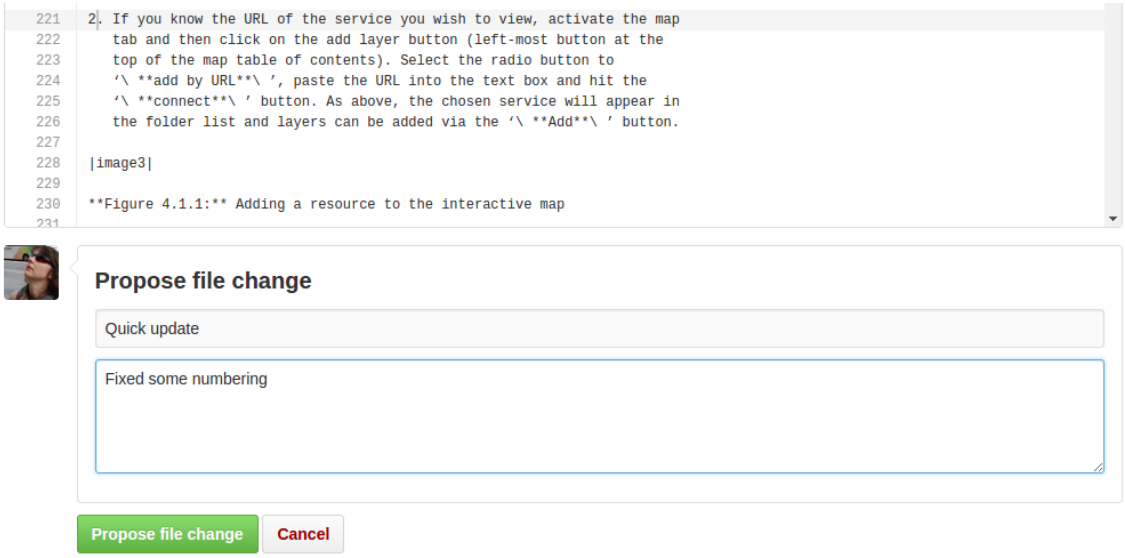


Figure 14.1.2: Detailing your changes

Click the green "Propose change" button and then in the following window, quickly review your changes and then click the green "Create pull request" button.

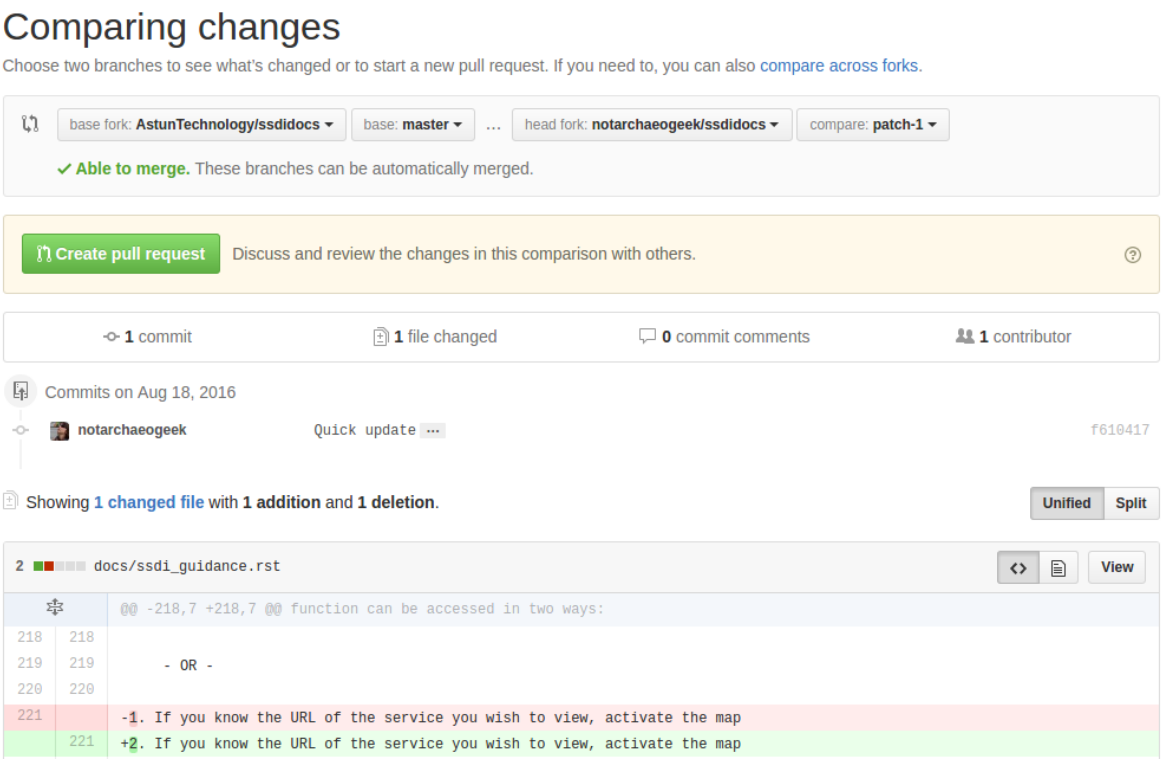


Figure 14.1.3: Reviewing the pull request

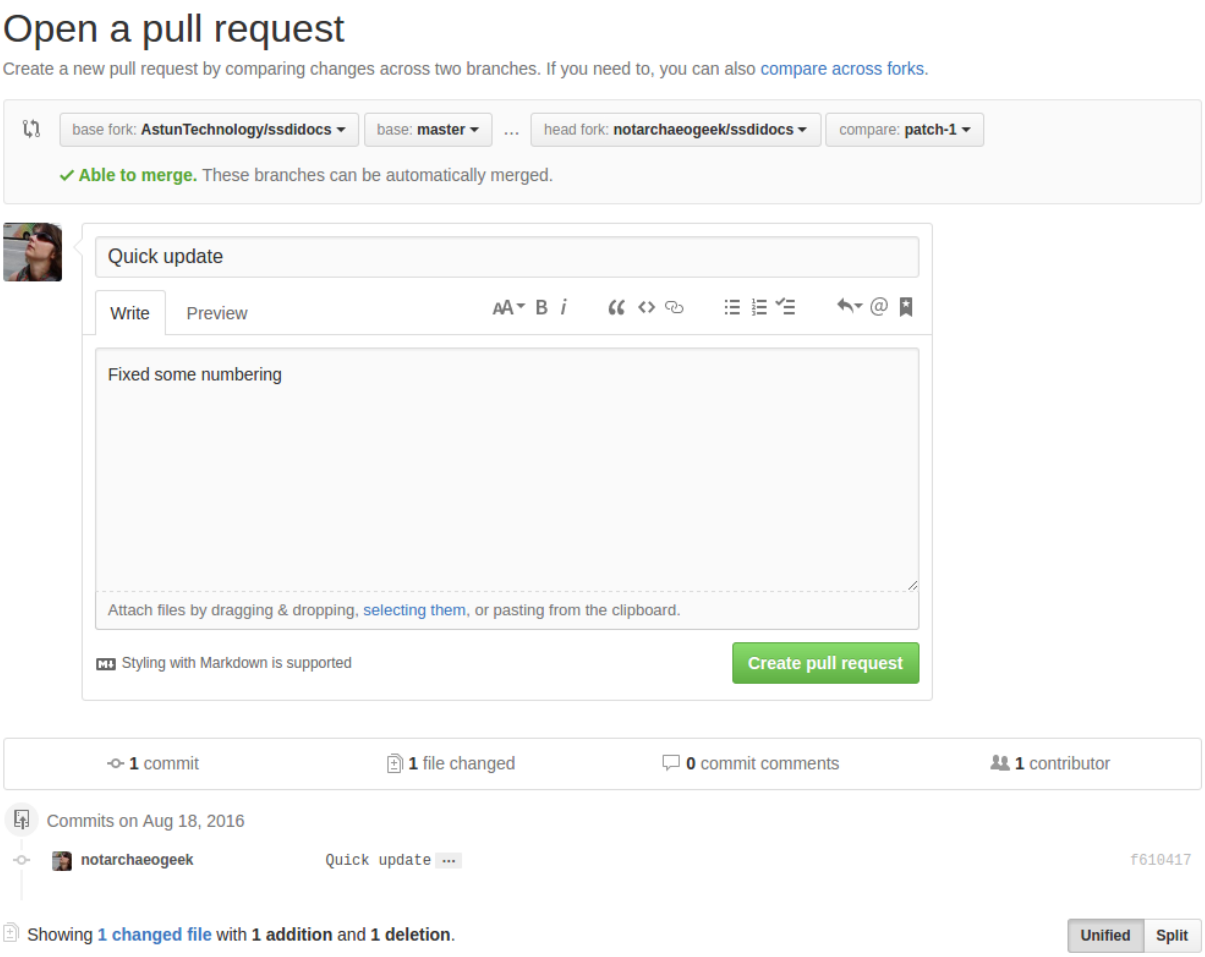


Figure 14.1.4: Creating the pull request

In the following window, if necessary expand on your explanation of the changes and then click the green "Create pull request" button.

The final window provides one further opportunity to make comments about your changes, but there is no requirement to do so. An email is sent to the owner of the repository, who will review the changes you have made and accept or reject them. If the change is accepted you will be notified by email but need take no further action- the new documentation will be automatically updated and pushed to ReadTheDocs. If the change is rejected for some reason then you will be notified of the reason why and the pull request will be closed without your changes being accepted.

Note that you will not be able to add new images using this method, you'll need to edit locally (or provide Astun with the images).

25.3 Editing locally

Editing the files locally requires the installation of a Git client on your local computer. Details on installation and configuring git are beyond the scope of this document, but downloads and instructions for windows can be found at https://git-for-windows.github.io/.

You will need a GitHub account to edit files locally.

CHAPTER

TWENTYSIX

ADVANCED TROUBLESHOOTING

Changes to stylesheets and layout configuration occasionally require the GeoNetwork cache to be rebuilt. This may result in partially displayed or completely blank pages. If the "Clear Formatter Cache" tool in the Admin Console does not resolve the issue, or is not reachable, then running the following two services will resolve the problem. You will need to reload the problematic page once you have run these two services.

- Reload Model: https://www.spatialdata.gov.scot/geonetwork/static/wroAPI/reloadModel
- Reload Cache: https://www.spatialdata.gov.scot/geonetwork/static/wroAPI/reloadCache

Note that the services don't return a result, just a blank page. Note also that the pages will take a long time to load after these services have been run, as the cache is being completely rebuilt.

CHAPTER

TWENTYSEVEN

USING ZEPPELIN FOR ANALYTICS

27.1 What is Zeppelin?

Apache Zeppelin is a user-configurable data dashboard that connects to the back-end PostgreSQL database where the SSDI Metadata records are stored. It allows catalogue adminstrators to query the metadata alongside the other data stored in the database, using standard Structured Query Language (SQL). A read-only user is used for the database connection to ensure that the data cannot be edited or deleted.

27.2 Logging in

It can be accessed by clicking the link **Analytics (admin only)** in the SSDI catalogue, and will open in a new tab. To log in (this must be done separately to the SSDI catalogue), click the **Login** buttin in the top right and use your catalogue username and password.

Once you have logged in, click the **SSDI Analytics** link on the left.

27.3 Getting Started

Zeppelin notebooks comprise a series of **paragraphs** with the following elements:

- An optional title
- Buttons to run or refresh the query, hide visual elements, and more configuration options
- The SQL statement, otherwise known as the **editor** (this may be hidden)
- An optional dynamic entry form such as a dropdown list or text box
- A set of charting options, such as table, bar graph or piechart, along with data download options
- The results, otherwise known as the **output**

27.4 SSDI Catalog Database Structure

There are three schemas in the SSDI database. To refer to a table, view (saved query) or function in any schema other than the public one, it is necessary to use the form **schema.object**.

27.4.1 audit

This holds the functions and tables required for the audit history plugin. The **logged_actions** table holds the actual audit history.

27.4.2 custom

Holds any custom functions or views (database queries) added to the core GeoNetwork database.

The key views are:

- **metadata_xml**: this is a copy of the main metadata table in the public schema, with the difference that the **data_xml** column contains the actual stored metadata in xml format rather than as a blob. This allows xpath functionality to be used, so that the metadata itself can be queried.
- **all_records**: this is a simplified conversion of the actual metadata into database columns. It is not all-encompassing as the xml structure doesn't map exactly to a flat table format.

If **all_records** does not include the necessary information, it is possible to update it, but this must be done in the PostgreSQL database itself, not in zeppelin.

Other views have been created to simplify the SQL used in the zeppelin paragraphs.

27.4.3 public

This holds the core GeoNetwork tables. The key tables are:

- **metadata**: holds the actual metadata records along with ownership, schema, changedate and harvesting information (amongst other things)
- **groups**: lists the groups
- **users**: lists the users

Relationships between tables are done with id fields. The naming convention is to name the column **id** in the primary table, and **tableid** in the secondary table. So for example, the **usergroups** table that contains information on which users are members of which groups has the following columns:

- userid: the id from the user table
- groupid: the id from the group table
- profile: the user's profile within the given group

Some tables also have translation tables, which have a **des** suffix. This contains the display name for the given object in the different languages that GeoNetwork supports. Again, the id field is used to link the primary table to the translation table, but the naming convention is not always consistent. As an example, the groupsdes table which shows the display name for groups has the following columns:

- iddes: the id from the group table
- langid: the language shortcode
- label: the display name in the given language

See below on how to use zeppelin to understand the tables in order to build your own queries.

27.5 Constructing new paragraphs or queries

So it's possible to construct new queries, the following paragraphs can be used to understand the structure of the database and tables:

- **Get tables in public, custom and audit schemas** : This lists the tables and views in the audit, custom and public schemas. It is primarily used to get the correct table name for use in the query below.
- **Find the columns and data types for a given table**: This lists the columns and data types for the table entered into the dynamic text box. Note that this should be entered without a schema prefix.

27.5.1 Basic multi-table queries

If you wish to construct a query containing columns from two or more tables or views then the general approach is to use table aliases and joins on the id fields. For example, to construct a query showing usernames, the display name for the groups they belong to, and their profiles in that group, then the following syntax would be used:

```
SELECT u.username, s.profile, g.label
FROM users u
JOIN usergroups s ON u.id=s.userid
JOIN groupsdes g ON s.groupid = g.iddes
WHERE g.langid = 'eng'
ORDER BY username, label, profile;
```

27.5.2 Queries involving xml

To query the stored metadata in custom.metadata_xml it is necessary to use XPath syntax within PostgreSQL. XPath is a query language for selecting nodes from an XML document. To use it you will need to interrogate the XML of a record, either by viewing it in the XML view when editing, or downloading it as XML and opening it in a text editor. Learning XPath is beyond the scope of this guide, but the above link gives a primer on the syntax.

PostgreSQL has a function called xpath for interrogating XML. It takes the following parameters:

- **xpath**: the Xpath for the xml element you want
- **xml**: the xml it should interrogate
- **nsarray**: an array of namespaces referenced in the XPath query. These are the prefixes before the metadata elements, such as gmd:fileIdentifier or gco:CharacterString. Each namespace in the XPath query needs to have both the prefix and the namespace URI. These can be found in the root element of a metadata record if you view it as XML.

The xpath function returns an array of values. These must be concatenated into a string to use them in queries. The PostgreSQL array_to_string function is used for this. It takes the following parameters:

- **array**: the array to convert
- **delimiter**: the character used to delimit the array values when converted to a string
- **null string (optional)**: the optional character used in place of any NULL values found in the array

The following example extracts the uuid and title from the metadata records, using the **data_xml** column from **custom.metadata_xml** as the xml source. If there were multiple titles, they would be separated by commas:

```
SELECT uuid, array_to_string
        (
                xpath
                (
                        '/gmd:MD_Metadata/gmd:identificationInfo/gmd:MD_
↪DataIdentification/gmd:citation/gmd:CI_Citation/gmd:title/gco:CharacterString/text()',␣
↪ metadata_xml.data_xml,
                        '{{gco,http://www.isotc211.org/2005/gco},{gmd,http://www.
↪isotc211.org/2005/gmd}}'
                ),
        ',')
AS title FROM custom.metadata_xml;
```

(note that the above query will result in some blank rows- these are generally template records)

27.6 Adding new queries to Zeppelin

To add a new query or paragraph, scroll to the very bottom of the notebook and start typing your SQL query at the prompt. When you are ready to run it, click the **run this paragraph** button. If there are any errors in your query they will be shown in the output.

To give your query a title, click the **settings** button and select **show title**, then type the title in the text area that appears (generally pre-filled with "Untitled").

CHAPTER

TWENTYEIGHT

PRIVACY ON THE SSDI

This notice explains how we use any personal information we collect about you when you use this website. The site, spatialdata.gov.scot, is provided by the Scottish Government (the *data controller*), however, we use a third party, Astun Technology, for the hosting and management of the metadata catalogue (the *data processor*).

This privacy notice is kept under regular review and any updates will appear on this page. This notice was last updated on **July 8th, 2020**.

28.1 What is collected and how is it used?

When you browse the site, your **IP address** is collected and cookies are used to monitor your session. Additionally, if you register as a contributer to the site you will be required to provide your **email address**. This information is used purely for the purposes of maintaining the portal, improving it based on how you use it, and notifying contributors of any changes or service interruptions. The information can be viewed by authorised people in the Scottish Government.

As noted above, we use a third party, Astun Technology, for the hosting and management of the metadata catalogue. To view further details about what is collected on the site and how it is used please see their metadata privacy policy. Astun Technology does not retain, share, store or use this information for any secondary purposes.

We will not share your information with other organisations for commercial purposes and we won't pass on your details to other parties, unless required to do so by law.

28.2 Access to your information

You are entitled to view, amend, or delete the personal information that we hold about you. For more information on accessing the information we hold about you, please contact us.

Be aware that most modern web browsers allow users to control cookies through the browser settings. To find out more about cookies, including how to see what cookies have been set and how to manage and delete them, visit www.aboutcookies.org or cookies.insites.com.

28.3 Contact us

Please contact us via email at SSDI.metadata@gov.scot if you have any questions with regards to your privacy when using the SSDI metadata portal or information we hold about you.

CHAPTER

TWENTYNINE

DOCUMENTATION LICENCE

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CHAPTER

THIRTY

ACCESSIBILITY

This website is hosted and maintained by Astun Technology on behalf of the Scottish Government. We want Spatial-Data.gov.scot to be accessible and usable for as many people as possible.

30.1 How accessible this website is

We know some parts of this website are not fully accessible:

- Not all non-text content is available in text form, for example not all images have "alt" attributes
- Not all content can be rendered using assistive technology
- Some elements such as links are distinguishable only by colour
- Not all pages have titles or descriptions that adequately describe their purpose
- Not all links have a purpose that can be determined by the link text alone
- Entering data into controls does not always have a predictable effect, nor are consistent instructions provided on their use

30.2 Feedback

If you cannot access any part of this site or want to report an accessibility problem, please tell us.

AbilityNet has advice on making your device easier to use if you have a disability.

30.3 Enforcement procedure

The Equality and Human Rights Commission enforces the accessibility regulations (the Public Sector Bodies (Websites and Mobile Applications) (No. 2) Accessibility Regulations 2018).

If you're not happy with how we respond to your feedback, contact the Equality Advisory and Support Service. They are an independent advice service. They will advise you on what to do next.

30.4 Compliance statement

The Scottish Government commits to making its websites accessible, in accordance with the Public Sector Bodies (Websites and Mobile Applications) (No. 2) Accessibility Regulations 2018. This accessibility statement applies to SpatialData.gov.scot and was last reviewed on 5 August 2020.

The site was reviewed using the SiteImprove Chrome plugin in August 2020. This website is not yet compliant with the Web Content Accessibility Guidelines version 2.1 (WCAG) A success criteria due to the non-compliances listed above.