

Adding metadata to documents

Adding metadata to your documents is a quick and essential part of the process to publish them online. It is the metadata that allows people to find your documents when searching. The University's [metadata standard](#) requires the addition of three key fields - author, title, and keywords - and this page takes you through the process of adding these.

Intranet or internet? A note on Documentum

Whether you're publishing your documents on the internet or intranet, metadata is added within the document itself.

However, you might have already intranet documents to Documentum, and added metadata when doing so. Unfortunately the metadata within Documentum cannot automatically be pushed into the document properties for use in search. You can, however, copy and paste from the Documentum metadata to the document's properties if required:

1. In Documentum, find your document, right click on the 'i' icon to the right of the document and select Properties.
2. Highlight and copy (Ctrl-C) the Full Title or other field you wish to copy, then click on the Cancel button to close.
3. Right click on the document itself and select Edit; this will open the document.
4. Follow the instructions below for adding metadata to an Office document or pdf, then close the document.
5. Once the document is closed, go back to Documentum, right click on the document and select **Check In**, save as a **Minor version** and click on **OK**.
6. You can now [publish your document](#) if required.

Word, Excel, and PowerPoint documents

First, open the relevant file: select the **File** menu and then the **Info** option.

The right-hand side of the screen displays the document properties; you just click in any field (or use the appropriate keyboard shortcut) to edit it.

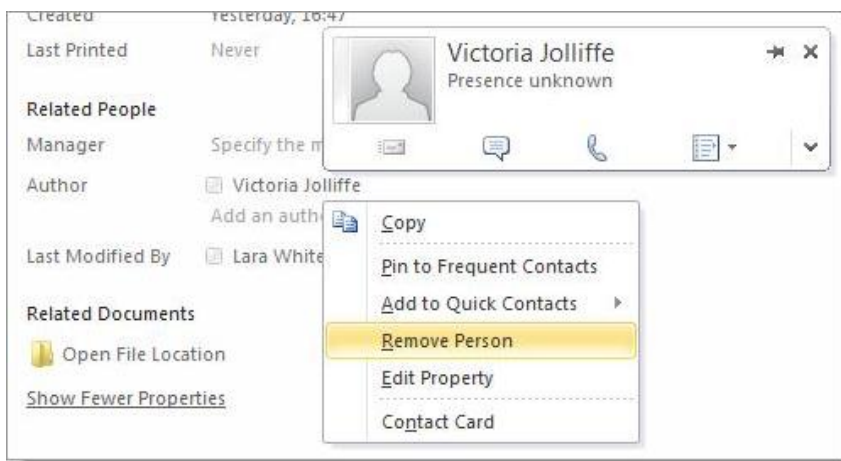


The screenshot shows a 'Properties' panel with the following sections and data:

Properties ▾	
Size	27.5KB
Pages	3
Words	856
Total Editing Time	323 Minutes
Title	Learn about Metadata
Tags	keywords, tags, guidance
Comments	Last reviewed: 2010-10-12
Related Dates	
Last Modified	03/06/2011 16:59
Created	03/06/2011 09:57
Last Printed	Never
Related People	
Author	<input type="checkbox"/> Lara Whitelaw <input type="checkbox"/> Linda Potter Add an author
Last Modified By	<input type="checkbox"/> Lara Whitelaw
Related Documents	
 Open File Location	
Show All Properties	

1. Author

In the **Author** field enter the name of the person or team responsible for owning the document, which can be found in the 'Related People' section. This should automatically display your name in the **Author** field. If this name is incorrect, right-click on the name and select 'Remove person'.



You can now add the correct name or additional names for collaborative documents by hovering your mouse to the right of the **Add an author** field and selecting the address book button. This will open the Outlook address book where you can select names from The Open University's active directory. If the author doesn't have an OU email address, type their name directly into the Author field.



2. Title

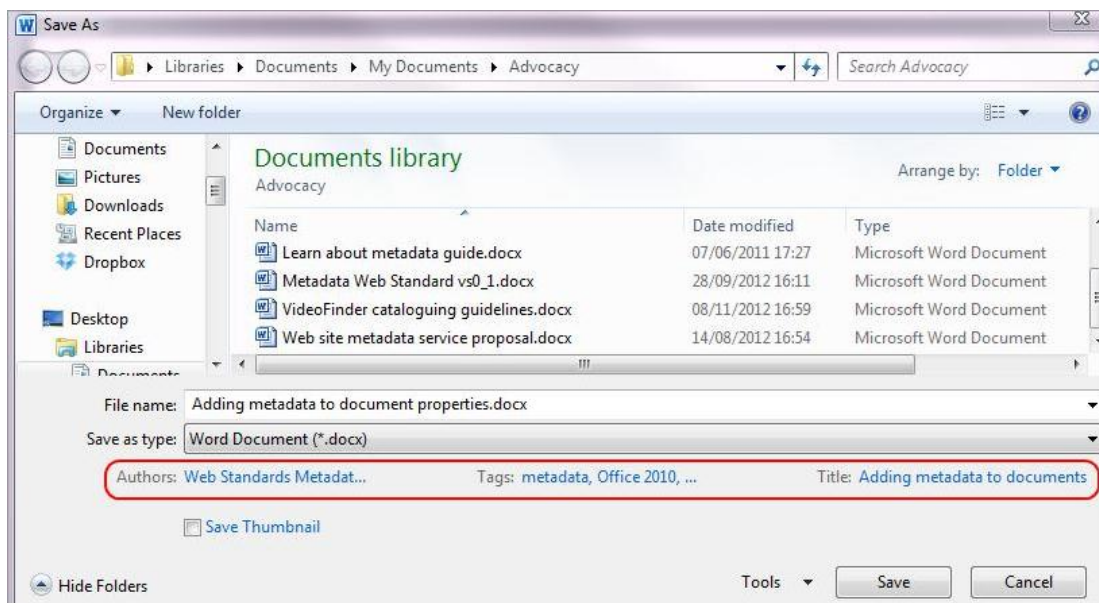
In the **Title** field enter a title for the document that is meaningful to users out of context. Remember that your document will be returned in lists of search results so it needs to have a title that reflects what the document is about. It should be no more than 80 characters.

3. Keywords

In the **Tags** field (this is the same as keywords), enter a comma-separated list of keywords that accurately summarise the contents of the document. Make sure that you don't repeat words that are in the title, although you may choose to expand acronyms. See our advice on [\[\[how to choose keywords\]\]](#) for further help.

Reusing a document

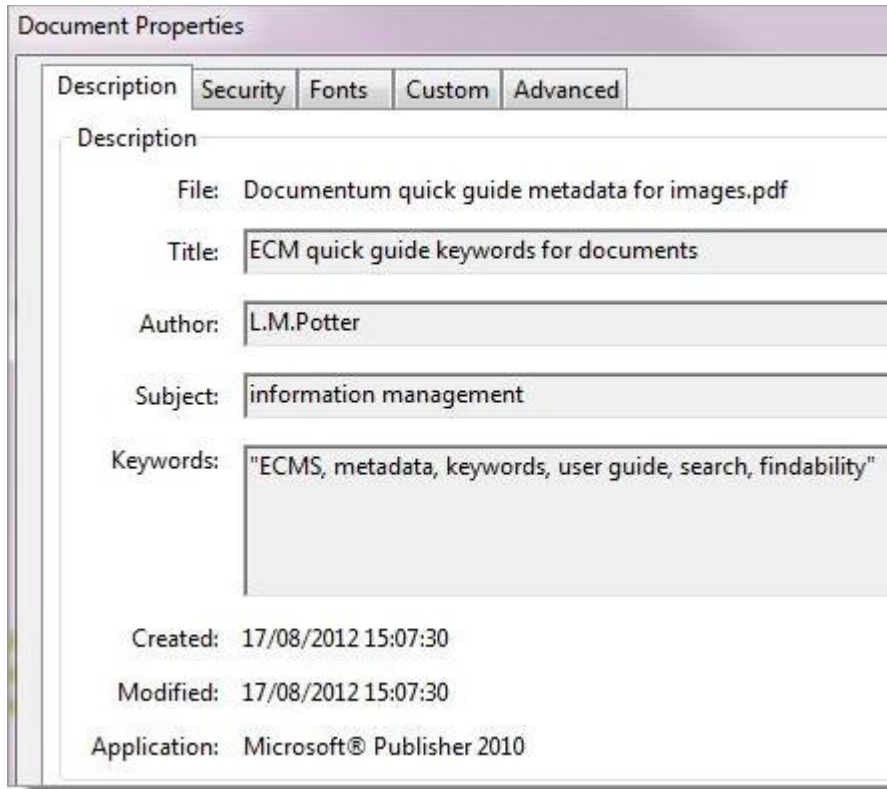
If a document is reused or copied to create another document, make sure that the document's properties are updated. You can make these changes from the **Save As** dialog box, without opening the document:



PDF documents

Any metadata in a document's properties will automatically be copied over when it is saved as a PDF, and also when Documentum creates a PDF version of a Word file for use on the intranet.

However, if you have edit access to a PDF and want to change the metadata, open the relevant file and select the **File** menu. Choose the **Properties** option to open the **Document properties** dialog box and then select the **Description** tab:



The screenshot shows the 'Document Properties' dialog box with the 'Description' tab selected. The dialog box has a title bar 'Document Properties' and several tabs: 'Description', 'Security', 'Fonts', 'Custom', and 'Advanced'. The 'Description' tab is active and contains the following fields:

- Description:** File: Documentum quick guide metadata for images.pdf
- Title:** ECM quick guide keywords for documents
- Author:** L.M.Potter
- Subject:** information management
- Keywords:** "ECMS, metadata, keywords, user guide, search, findability"

At the bottom of the dialog box, the following information is displayed:

- Created:** 17/08/2012 15:07:30
- Modified:** 17/08/2012 15:07:30
- Application:** Microsoft® Publisher 2010

You can then edit the three metadata fields:

1. In the **Author** field enter the name of the person or team responsible for owning the document.
2. In the **Keywords** field enter a comma-separated list of keywords that accurately summarise the contents of the document. See our advice on [\[how to choose keywords\]](#) for further help.
3. In the **Title** field enter a title for the document that is meaningful to users out of context. Remember that your document will be returned in lists of search results so it needs to have a title that explains what the document is about.

For further guidance, see the [Metadata intranet pages](#) or contact Library-Metadata@open.ac.uk.