

## Proposal for Document Process metadata, a new standard

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**This document** This document is a draft proposal for a proposed new standard for so called Document Process metadata.

It contains the following parts:

<b>Topic</b>	<b>See Page</b>
Document Process metadata	2
Element constructs of DP metadata	4
Dublin Core elements	6

## Document Process metadata

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**Purpose of this document** This document is a draft proposal for a proposed new standard for so called Document Process metadata. The purpose of this draft proposal is to provisionally define the new standard well enough so that interested parties can understand the scope of the standard.

The intention is that some of these interested parties will then express their desire to participate in an expert group whose first function will be to fully define the proposed standard.

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**Background** This proposal is not intended not to create a protocol for delivering detailed information, but to enable sharing and filtering of common documents. Other projects focus on XML solutions that cover the aspects of delivering exact and in detail described structured information. This proposal focus on general properties, that are more limited and more difficult to select in many aspects.

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**Background** Information about information, or data about data, that is, metadata has received a new focus thanks to the enormous spread of information facilitated by the world-wide web. The current de facto standard for bibliographic metadata, Dublin Core, established 1994 is an example of document-based, rather than database-based, metadata.

Information used at work and that travels through work flows is dependent on systems, applications and organizations with differing designs. Documents are derived from different sources, e.g. databases and word processors, and used in different ways, e.g. just for printing or published on a net. Organizing or sharing digital information is extremely difficult, if not impossible, when there is no infrastructure in place that covers all these sources. As a result the costs of integrating different systems increases exponentially.

Accordingly there is a need for a structured set of metadata that deals with the processes a document is involved in, what we call Document Process (DP) metadata

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**Storage and handling of metadata**

There are different ways to store metadata, for example:

- Document databases (closed solutions for authoring, access and flows)
- HTTP-DAV (The new web-protocol for authoring and versioning standard support properties)
- Local properties in file systems (NT2000) or documents (Word, Star Office, etc..) that act as metadata containers

We propose that DP metadata be stored in a database and that certain portions of it be replicated be within the document.

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## Document Process metadata, *Continued*

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### Storage and handling of metadata (*continued*)

There are several ways to handle metadata, for example:

- Document databases (closed solutions for authoring, access and flows)
  - HTTP-DAV/SAL (The new web-protocol for authoring and versioning standard support properties)
  - Metadata search engines (that search distributed documents over network)
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### Flexibility of metadata

The organization and structure of the proposed DP metadata must combine the following:

- Usability and efficiency in common tools, e.g. MS Word, HTML, SGML
- Simplicity that scales from small to global organizations
- Basic flows that can be extended to sub-group classifications
- Coverage of basic information-sharing needs between organizations

This proposed structure for DP metadata is presented below.

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### Proposed DP metadata classification

This is the proposed classification of DP metadata elements:

Groups of elements

Element, or classes of elements

Elements

#### Source

Identifier	unique document identifier
Creator	Same as Dublin Core
Publisher	Same as Dublin Core
Date	Same as Dublin Core

#### Process

Class	see <i>Elements – Class</i> below.
Status	see <i>Elements - Process States</i> below.
Relations	see <i>Elements – Relations</i> below.
Role	see <i>Elements – Role</i> below.
Publishing	One of a number of pre-defined states (as yet undefined) in a publishing process
Versioning	Version information (defined in other standards)

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## Document Process metadata, *Continued*

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**Proposed DP  
metadata  
classification  
(*continued*)**

Contents

Title	Same as Dublin Core
Description	Same as Dublin Core
Resource Type	Same as Dublin Core
Language	Same as Dublin Core
Coverage	Same as Dublin Core
Rights	Same as Dublin Core

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## Element constructs of DP metadata

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**Introduction** This section contains the preliminary definitions of the proposed new DP metadata elements.

A list of the Dublin Core (DC) elements covering bibliographic information is in the final section.

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**Element - Class** This element should be called DP.CLASS and can be seen as a DP specific variant of DC Type. It should have the following sub-elements:

Attributes	Definition
Errand	Errand i.e. support or internal problem that needs to be resolved
Definition	Item description (product/service etc.)
Offer	Sales proposal
Agreement	Contracts
Protocol	Notes to tell what has been said or done
Invitation	Invitation to seminar, meeting, etc.
Order	Work-order
Plan	Business, work or project plans over time
Information	Information related to a project that cannot be defined by one of the attributes above

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**Element - Process State** This element should be called DP.STATE (no correlation with DC) and have the following sub-elements (these elements do not relate to stages in a publishing process):

Attributes	Definition
Review	For review (not official)
Open	Open,
Confirmed	Official, signed
Assigned	Assigned to task/errand
Discarded	Not approved or stopped project/errand (can be combined with CLOSED)
Hold	Waiting for some reason (see unresolved dependence)
Active	Used in campaign or errand being resolved
Closed	Closed project, errand or plan (~resolved)

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## Element constructs of DP metadata, *Continued*

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**Element – Relation** This element should be called DP.PROCESS and have the following sub-elements:

<b>Sub-elements</b>	<b>Definition</b>
Core	Core process (activity that produces result) e.g. sales
Control	Control process (business control system) e.g. customer satisfaction
Support	Support process (Service type i.e. administration) e.g. direct mail

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**Element – Role** This element should be called DP.ROLE and have the following sub-elements:

<b>Sub-elements</b>	<b>Definition</b>
Owner	Sub-process owner (role/person/organisation)
Members	Members of process related group e.g. Reference Group (roles/persons/organisations)
Contact	Process instance contact (role/person/organisation)
Customer	Process instance customer

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## Dublin Core elements

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**Overview** This is an overview of existing Dublin Core elements that cover bibliographic information.

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<b>Elements</b>	<b>Dublin Core Elements</b>	<b>Description</b>
	Title	A name given to the resource.
	Creator	An entity primarily responsible for making the content of the resource.
	Subject and Keywords	The topic of the content of the resource.
	Description	An account of the content of the resource.
	Publisher	An entity responsible for making the resource available
	Contributor	An entity responsible for making contributions to the content of the resource.
	Date	A date associated with an event in the life cycle of the resource.
	Resource Type	The nature or genre of the content of the resource.
	Format	The physical or digital manifestation of the resource.
	Identifier	An unambiguous reference to the resource within a given context.
	Source	A Reference to a resource from which the present resource
	Language	A language of the intellectual content of the resource.
	Relation	A reference to a related resource.
	Coverage	The extent or scope of the content of the resource.
	Rights	Information about rights held in and over the resource.

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