



OKDHS Style Guide

Version 09-2009

Section 8.9

Best Practice for Adding Metadata to Documents

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Overview

The purpose of this section is to help Web Content Authors and Editors understand how to put metadata into documents for the Web. We ask division and offices to fill in this information because you know your offices and divisions better than us.

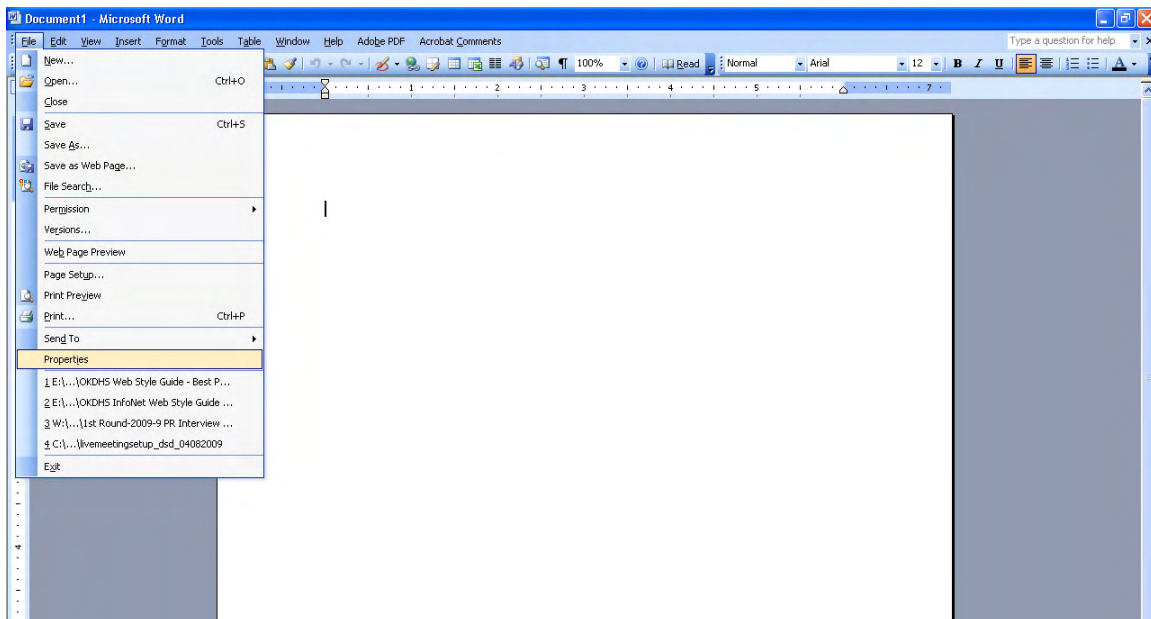
Metadata on documents serves the same purpose as placing metadata into a Microsoft Content Management System (MCMS) page. Placing metadata in documents, enhances the ability of search to find the documents.. When you search on a specific word, phrase, etc. the search engine also looks through all the documents available on our sites.

If you have suggestions, questions or comments about this information, contact the OKDHS Web Content Management Unit at (405) 521-3027 or by e-mail at WebContent@OKDHS.org.

Microsoft Word

File Menu

Once you have opened a new document or an existing document, you will need to go to the File menu at the top left corner of your Word toolbar.



Next, you will need to select Properties from the menu. This will bring up the document summary screen.

The image shows a 'Document10 Properties' dialog box with the 'Summary' tab selected. The fields are as follows:

- Title: [Empty text box]
- Subject: [Empty text box]
- Author: Oklahoma Department of Human Services
- Manager: [Empty text box]
- Company: State Of Oklahoma
- Category: [Empty text box]
- Keywords: [Empty text box]
- Comments: [Empty text box]
- Hyperlink base: [Empty text box]
- Template: Normal
- Save preview picture

Adding the Metadata

In the document summary screen you will need to fill in the information for the Title, Subject, Author, Company and Keywords. The following information will be the same process for both the OKDHS Internet and Intranet (InfoNet).

- **Title:** The title of your document will be what shows on the cover page or in the footer.
- **Subject:** Should be a single sentence describing what the document is. The document subject description you place into the document will be seen when search pulls the document.
 - When creating a description meta tag, the phrase “the Oklahoma Department of Human Services (OKDHS)” must be retained in the description.
- **Author:** This will be the division or office that created the document (i.e. Oklahoma Child Support Services (OCSS)).
- **Company:** Will always be “Oklahoma Department of Human Services (OKDHS)”
- **Keywords:** Are words or phrases a person uses to search the Web site
 - When creating keywords,, the words “Oklahoma, human services, okdhs, dhs, state government,” must be included in the keywords.

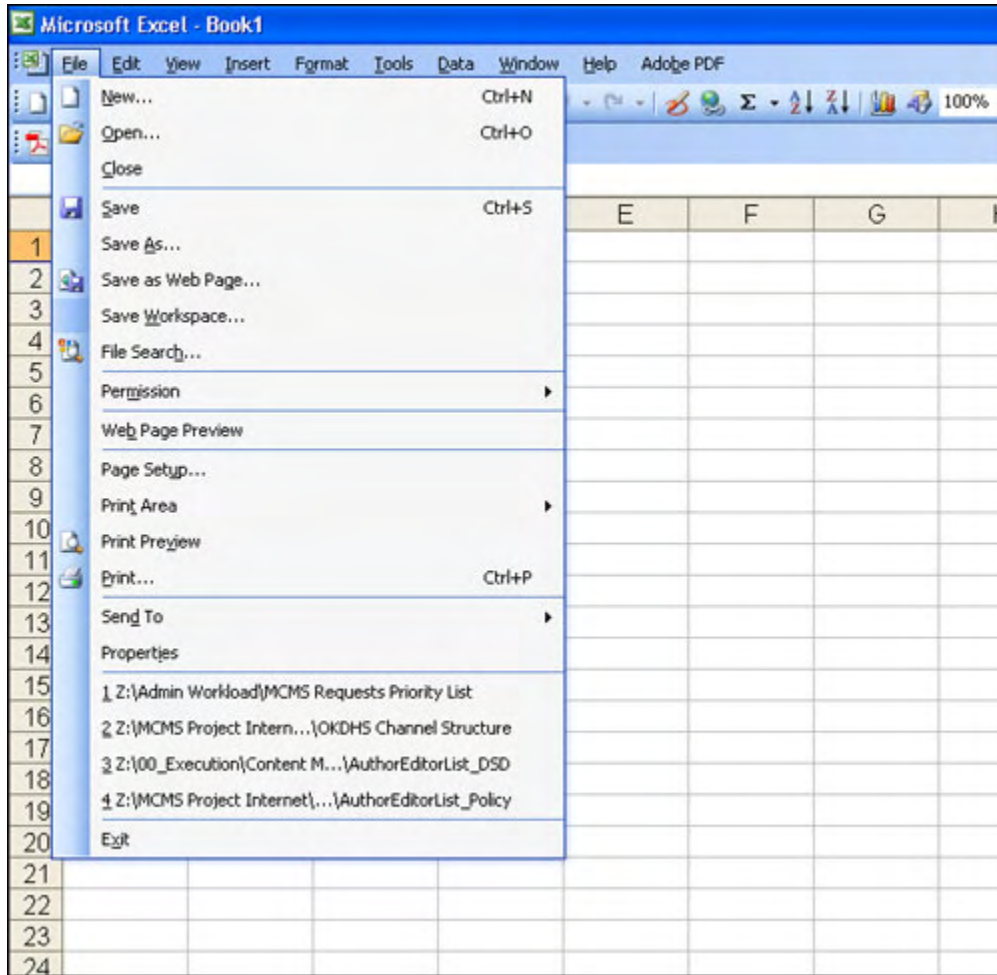
The image shows a Windows-style dialog box titled "BusinessCaseSummary_ocss_01082008 Properties". It has five tabs: "General", "Summary", "Statistics", "Contents", and "Custom". The "Summary" tab is selected. The dialog contains several text input fields and a checkbox. The fields are: "Title" (containing "Business Case Summary"), "Subject" (containing "View the Business Case Summary for Child Support"), "Author" (containing "Child Support Enforcement Division"), "Manager" (empty), "Company" (containing "Oklahoma Department of Human Services"), "Category" (empty), "Keywords" (containing "child support enforcement division, csed, business"), "Comments" (empty), and "Hyperlink base" (empty). Below the fields, the "Template" is set to "Normal". At the bottom left, there is a checkbox labeled "Save preview picture" which is currently unchecked. At the bottom right, there are two buttons: "OK" and "Cancel".

Once all the steps above have been completed select, "OK."

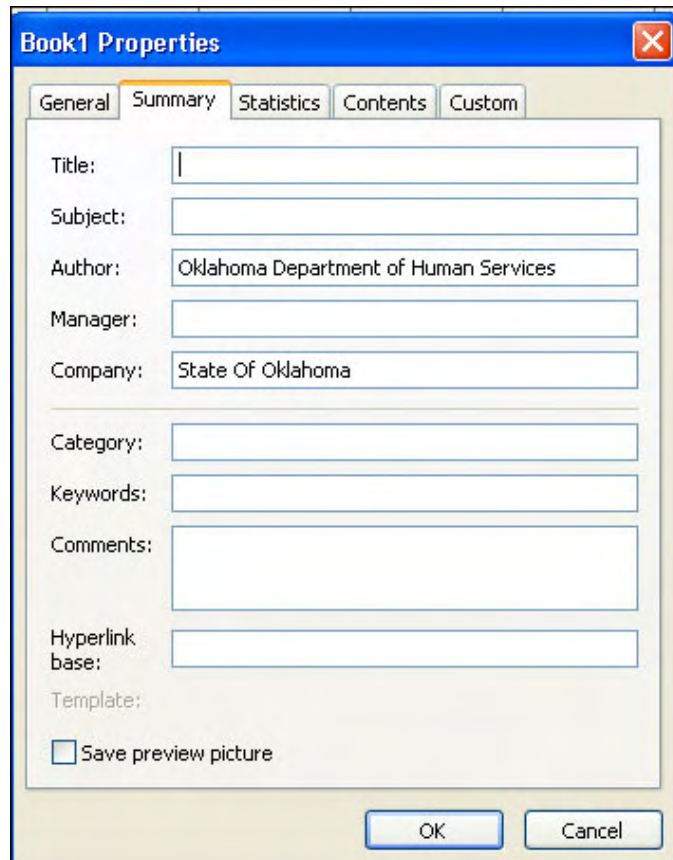
Microsoft Excel

File Menu

Once you have opened a new or existing document, you will need to go to the File menu at the top left corner of your Excel toolbar.



Next, you will need to select Properties from the menu. This will bring up the document summary screen.



Adding the Metadata

In the document summary tab, you will need to fill in the information for the Title, Subject, Author, Company and Keywords. The following information will be the same process for both the OKDHS Internet and Intranet (InfoNet).

- **Title:** The title of your document will be what is shown on the cover page or in the footer.
- **Subject:** Should be a single sentence describing what the document is. The document description you place into the document will be seen when search pulls the document.
 - When creating a description meta tag, the phrase “the Oklahoma Department of Human Services (OKDHS)” must be retained in the description.
- **Author:** This will be the division or office that created the document (i.e. Oklahoma Child Support Services (OCSS)).
- **Company:** Will always be “Oklahoma Department of Human Services (OKDHS)”
- **Keywords:** Are words or phrases a person uses to search the Web site.
 - When creating keywords,, the words “Oklahoma, human services, okdhs, dhs, state government,” must be included in the keywords.

The image shows a Windows-style dialog box titled "2009 04 10 Activities in Progress.xls Properties". The "Summary" tab is selected, showing the following fields:

- Title:** MOSIAC Activities in Progress
- Subject:** Activities in Progress
- Author:** Jessica Lund
- Manager:** (empty)
- Company:** Oklahoma Department of Human Services (OKDHS)
- Category:** (empty)
- Keywords:** MOSIAC Activities in Progress, Activities in Progress
- Comments:** (empty)
- Hyperlink base:** (empty)
- Template:** (empty)

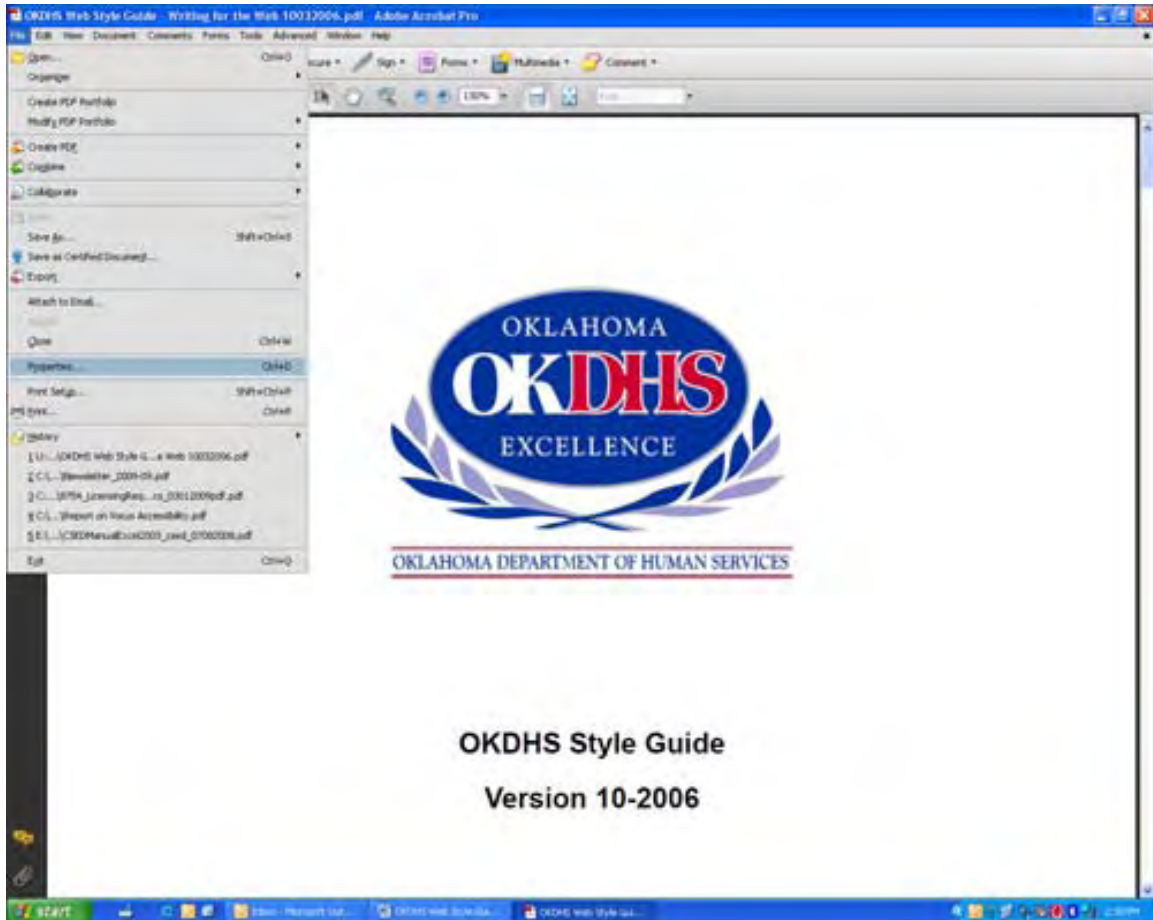
At the bottom, there is a checkbox labeled "Save preview picture" which is currently unchecked. Below the checkbox are two buttons: "OK" and "Cancel".

Once all the steps above have been completed select, "OK"

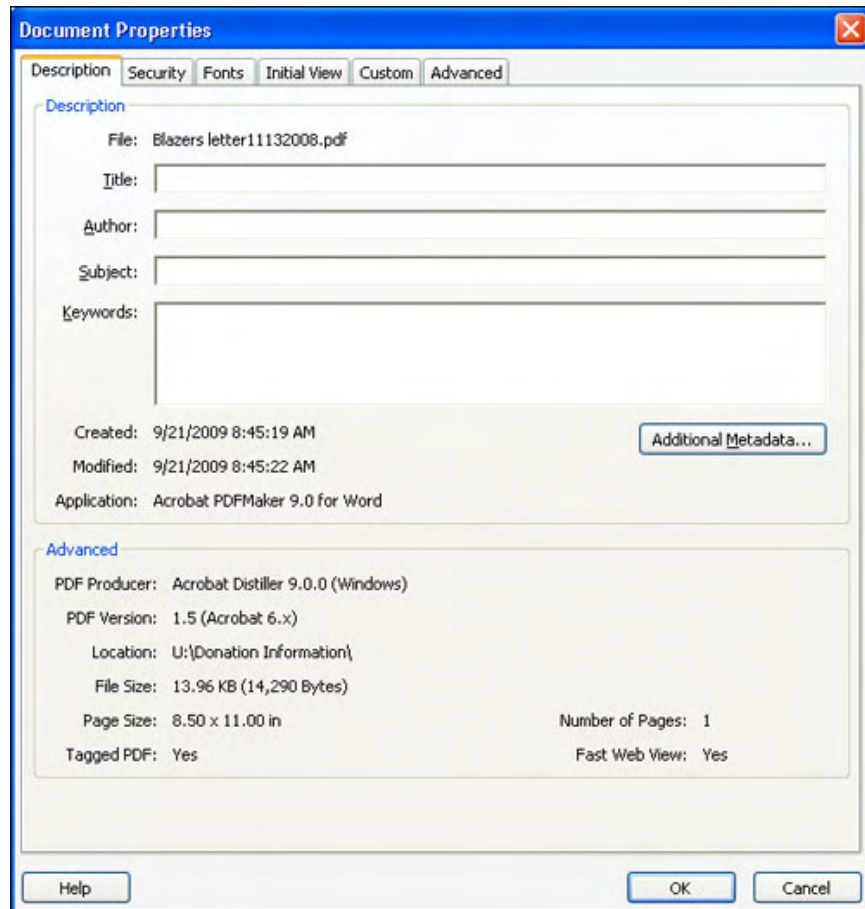
Adobe PDF

File Menu

Once you have opened the document, you will need to go to the File menu at the top left corner of your PDF document.



Next, you will need to select Properties from the menu. This will bring up the document properties screen.

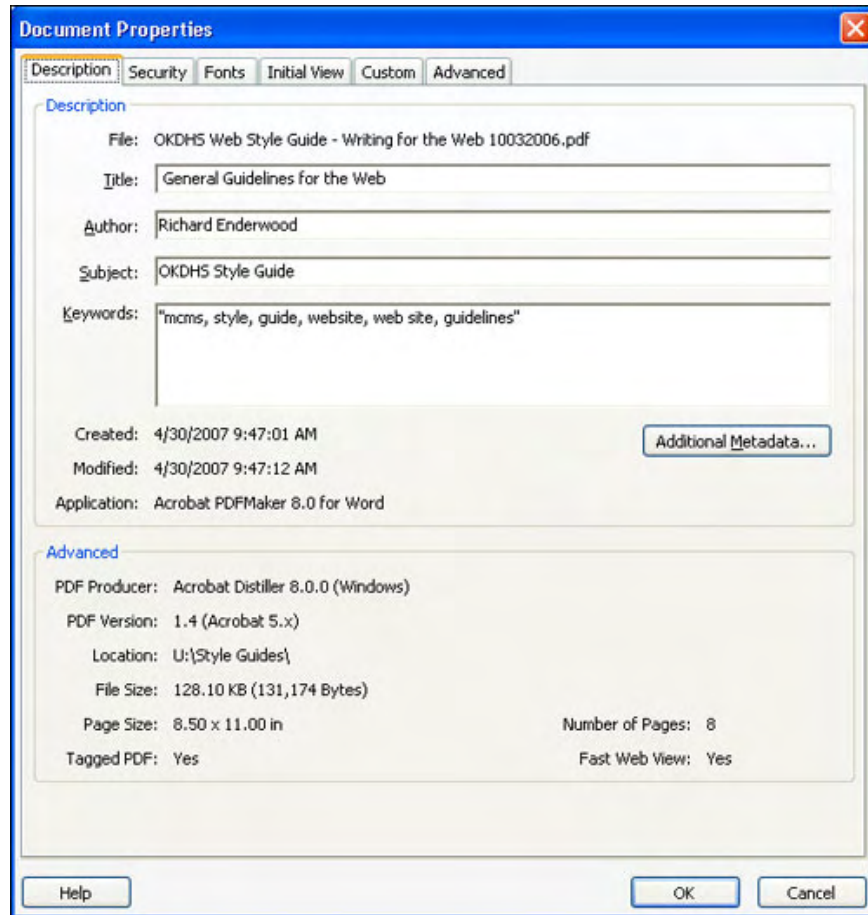


Adding the Metadata

In the document description tab screen, you will need to fill in the information for the Title, Subject, Author, Company and Keywords. The following information will be the same process for both the OKDHS Internet and Intranet (InfoNet).

- **Title:** The title of your document will be what is shown on the cover page or in the footer.
- **Subject:** Should be a single sentence describing what the document is. The document description you place into the document will be seen when search pulls the document.
 - When creating a description meta tag, the phrase “the Oklahoma Department of Human Services (OKDHS)” must be retained in the description.
- **Author:** This will be the division or office that created the document (i.e. Oklahoma Child Support Services (OCSS)).
- **Company:** Will always be “Oklahoma Department of Human Services (OKDHS)”
- **Keywords:** Are words or phrases a person uses to search the Web site.

- When creating keywords, the words “Oklahoma, human services, okdhs, dhs, state government,” must be included in the keywords.



Additional Metadata

You will see the information you placed into the document properties once you select the additional metadata button. You will need to complete two additional lines for the PDF.

- **Description Writer:** This should be your first initial period and last name (K.Favaloro) of the writer.
- **Copyright Status:** These settings are different for the Internet and InfoNet for OKDHS.
 - Internet: You will need to go to the Copyright Status dropdown and select “Public Domain” then, in the Copyright Info URL, you will need to place the following link into this line:
<http://www.okdhs.org/notices/copyright.htm>
 - InfoNet: You will need to go to the Copyright Status dropdown and select “Unknown” then in the Copyright Info URL, you will need to

place the following link into this line:
<http://infonet/policies/docs/copyright.html>

OKDHS Web Style Guide - Writing for the Web 10032006.pdf

Description

Document Title: General Guidelines for the Web

Author: Richard Enderwood

Author Title:

Description: OKDHS Style Guide

Description Writer:

Keywords: "moms, style, guide, website, web site, guidelines"

Commas can be used to separate keywords

Copyright Status: Unknown

Copyright Notice:

Copyright Info URL:

Go To URL...

Created: 4/30/2007 9:47:01 AM
Modified: 4/30/2007 9:47:12 AM
Application: Acrobat PDFMaker 8.0 for Word
Format: application/pdf

Powered By xmp

OK Reset

Once all the steps above have been completed select, "OK"

Completed Documents

Please e-mail your documents to WebContent@OKDHS.org.