



Data Store User Guide

How to Create a Reference

This module walks you through the process of creating a reference. We're using the reference type "raster dataset" as an example.

Wait! The first thing, before you go any further, is to make sure your reference hasn't already been created in the Data Store. This essential step will *help prevent duplicate records* (which can be a real problem).

Use any of the search options to look for the information you're about to enter. If a reference already exists and it looks good, you just saved yourself some work.

If the reference has already been entered but you think it needs improvement or updating, click on the Permissions tab and see who the reference owners are. You can contact an owner directly or, if you prefer, send an email to irma@nps.gov with a brief description of how the reference needs to be improved. The Data Store staff will reply to you in short order.

Once you're certain your reference is new to the Data Store, here are the steps to follow.

Step 1. Select the Option to Create a Reference



Image 1: The create reference link is found in the top navigation bar.

Step 2. Select the Appropriate Reference Type

Select from the combo box or start typing to filter the list. If you click on a reference type, you'll see a definition that provides more detail about the type.

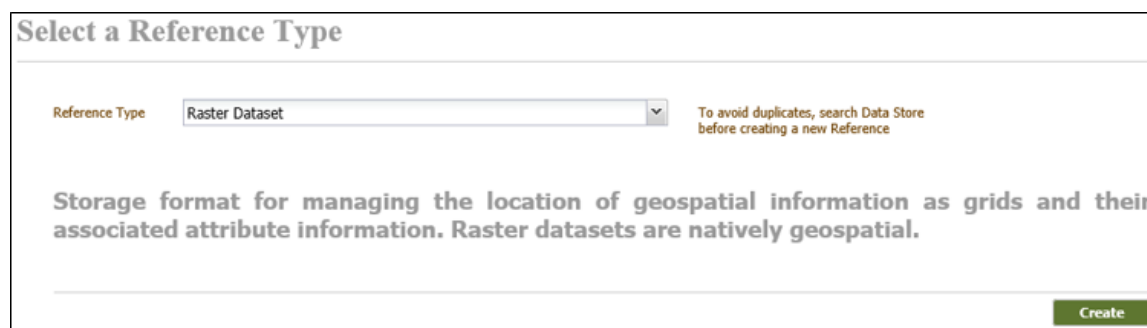


Image 2: Select a reference type.

Once you select the reference type, click on the Create button to continue. The editing window will open with a set of tabs. In general, the importance of each tab and how frequently it is used decreases from left to right. Thus, this training module will focus on the first six tabs (covered in more detail below).

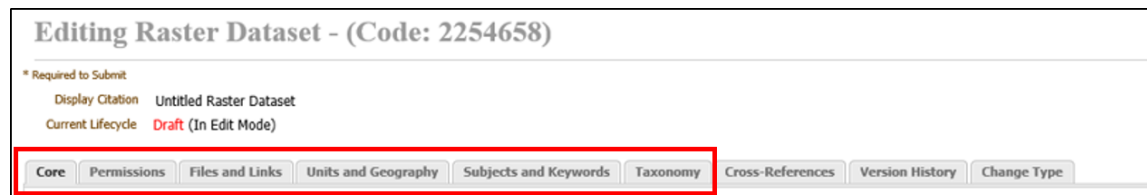


Image 3: Core tabs found in a reference.

Step 3. Complete the Core Tab

Add information to the fields in the Core tab. The specific fields and their exact labels may vary depending on the reference type you've selected.

There are four attributes that we strongly recommend you complete. Without these four items, the value of the reference is negligible, and the value of the information resource may be compromised over the long term.

- **Title** - Try to copy the exact title of the item you are describing. If that item does not have a clear title, then do your best to provide a meaningful title. Information you insert, that is not part of the source title, should be placed in brackets [].
- **Date of Issue/Date Published** - When the information resource created and/or published
- **Authors** – Enter the authors or some other type of contact responsible for the creation of the information resource.
- **Description** - A concise and meaningful description of the information resource.

The screenshot shows the 'Core' tab of a 'Raster Dataset' form. The form has several tabs at the top: Core, Permissions, Files and Links, Units and Geography, Subjects and Keywords, Taxonomy, Cross-References, Version History, and Change Type. The 'Core' tab is active. The form contains the following fields and sections:

- Title:** A text input field with a red box around it and a red '1' icon to its right.
- Date Published:** A dropdown menu set to 'Exact Date' and a date input field with a red box around it.
- Creator(s):** A text input field with a red box around it, an 'Add' button, and a 'No Creator(s) found' message.
- Steward(s):** A text input field with an 'Add' button and a 'No Steward(s) found' message.
- Originator(s):** A text input field with an 'Add' button and a 'No Originator(s) found' message.
- Created by or for the NPS:** Radio buttons for 'Yes', 'No', and 'Unknown' (selected).
- Code/ID:** A text input field.
- Publisher/Producer:** A text input field.
- Location Description:** A text input field.
- Content Begin Date:** A dropdown menu set to 'Exact Date' and a date input field.
- Content End Date:** A dropdown menu set to 'Exact Date' and a date input field.
- Scale/Pixel Size:** A text input field.
- Description:** A text input field with a red box around it.
- Purpose:** A text input field.
- Notes:** A text input field.
- Version:** A text input field.

Image 4: Core tab.

When possible and where appropriate, complete all of the other fields. However, do not fill in the fields with information that's not helpful (e.g., 'Unknown', 'N/A').

Step 4. Save Your Work

Work can be saved at any time by hitting the 'Save' button. Selecting the Save option will not close your edit session, nor will your record go live.

The screenshot shows a 'Save & Close' dialog box. It has a 'Cancel' button on the left and a 'Save' button in the center. On the right, there is a 'Save & Close' section with three buttons: 'Inactivate', 'Draft', and 'Activate'.

Image 5: Save button.

Step 5. Review the Permissions

From the Permissions tab, specify and qualify permissions.

The most important concept to understand on this page are the Reference and File Access levels.

- **Reference Access Level** - Who has permission to view the reference (i.e., public = everyone; internal = NPS only)
- **File Access Level** - Who has permission to download any attached digital files, assuming there are some
 - **Public** = Everyone
 - **Internal** = NPS only
 - **Specific Individuals** = Restricted to designated individuals

Please note that all new references are defaulted to 'Internal' for both the Reference and File Access Level. This is easily modified if they're not an appropriate designation.

Depending on the choice of Reference and File Access levels, the justification options will change. For example, if you designated public access to both the reference and the attached files for a report, you would not have an option to indicate that the report contains sensitive information (see example below).

Reference Access Level ☒ Public ☐ Internal

File Access Level ☒ Public ☐ Internal ☐ Specific Individuals

Justification

Provide further clarification about the information being described by the reference.

Sensitivity ☒ Not Sensitive ☐ Operations ☐ Unknown ☐ Sensitive

Copyrighted, Proprietary or Other Distribution Restrictions ☐ None ☐ Unknown ☒ Proprietary/Copyrighted

☒ Permission to Distribute for Non-Commercial Use ☐ Permission to Distribute Internally to all NPS staff ☐ Distribution Limited to Select Individuals

Quality of the Information Source Being Described by this Reference ☐ High ☐ Operational ☒ Unknown

Image 6: Permissions tab.

However, if access is limited to selected individuals, more options are provided to qualify the reasons why:

The screenshot displays a web form for creating a reference. It includes sections for 'Reference Access Level', 'File Access Level', 'Justification', and 'Sensitivity'. The 'Reference Access Level' and 'File Access Level' sections both have 'Public' and 'Internal' options, with 'Public' selected. The 'Justification' section has 'Specific Individuals' selected. Below this is a table with columns for Name, User Code, and Email, containing one entry: Marianne Tucker, MTucker@nps.gov, Marianne_Tucker@nps.gov. The 'Sensitivity' section has 'Sensitive' selected, with a list of checkboxes for various categories: Archeological, Caves, Commercial Value, Cultural, Endangered, Indian Sacred Sites, Litigation, Minerals, Paleontological, Personally Identifiable Information (PII), Rare, Security, Threatened, and Wells. A red box highlights the 'Sensitive' section and the 'Proprietary/Copyrighted' section, which has 'Distribution Limited to Select Individuals' selected. The 'Quality of the Information Source Being Described by this Reference' section has 'Unknown' selected.

Reference Access Level ☒ Public ☐ Internal

File Access Level ☐ Public ☐ Internal ☒ Specific Individuals

Name	User Code	Email
Marianne Tucker	MTucker@nps.gov	Marianne_Tucker@nps.gov

Justification

Provide further clarification about the information being described by the reference.

Sensitivity ☒ Not Sensitive ☐ Operations ☐ Unknown ☒ Sensitive

☐ Archeological ☐ Minerals
☐ Caves ☐ Paleontological
☐ Commercial Value ☐ Personally Identifiable Information (PII)
☐ Cultural ☐ Rare
☐ Endangered ☐ Security
☐ Indian Sacred Sites ☐ Threatened
☐ Litigation ☐ Wells

You must select at least one

Copyrighted, Proprietary or Other Distribution Restrictions ☐ None ☐ Unknown ☒ Proprietary/Copyrighted

☐ Permission to Distribute for Non-Commercial Use
☐ Permission to Distribute Internally to all NPS staff
☒ Distribution Limited to Select Individuals

Quality of the Information Source Being Described by this Reference ☐ High ☐ Operational ☒ Unknown

Image 7: Individual permissions to access the reference.

In this case, it is possible to give an individual permission to access the file (e.g., Marianne Tucker) and designate the information as being sensitive and/or proprietary.

Additional options on this page include:

- **Reference Owners** - Give others permission to edit your record by making them an owner. Note that you are, by default, an owner too.

Name	User Code	Email
Cindy Amack	camack@nps.gov	cindy_amack@nps.gov
Marianne Tucker	MTucker@nps.gov	Marianne_Tucker@nps.gov

Image 8: Who may edit the reference?

- **Additional Use Constraints** - Any other disclaimers/requirements/notes regarding the use of the information resource.

Image 9: Additional use constraints.

- **Allow Data Stewards to Edit the Record** - Allow Data Stewards (skilled Data Store reviewers often part of the Data Store management team) to review and improve the quality of the Reference, if needed.

Image 10: Allow Data Stewards.

Step 6. Add Files and Links

A user may upload zero or more files, where the maximum file size is 4GB per file. If there is no file to upload, optionally a user can point to the information housed on another web site. More advanced users may also point to other web services.

Image 11: Add a digital file.

A reference can have as many files, external links or web services as needed--there is no limit. The order of these files/links/services is controlled by dragging them in the grid and then selecting the 'Set' option from the Display Order button.

Step 7. NPS Units and Geography

Select the Units and Geography Tab. If, and only if, the information resource contains geographic information specific and pertinent to an NPS unit (e.g., office, region), should it be linked to the

respective units(s). Often linking to the geographic extent of an organization (e.g., Inventory & Monitoring Division, Water Quality Division), when the geographic extent is not relevant, will diminish the usefulness of this information.

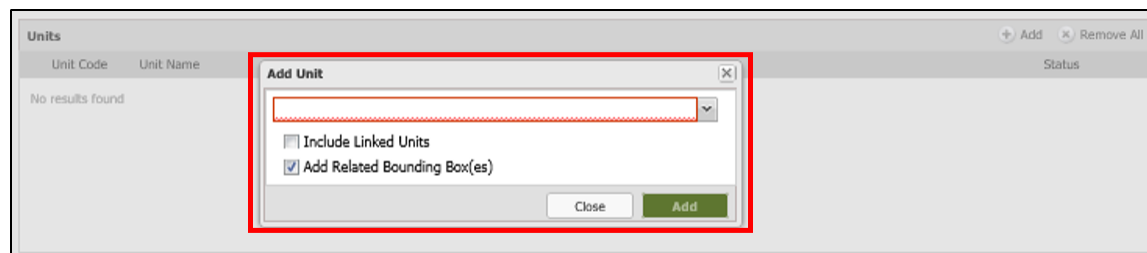


Image 12: Adding a unit.

In cases where you wish to link a reference to multiple parks (e.g., all parks in a network), select the 'Include Linked Units' option.

By default, bounding boxes for park units (if available) will be added, which facilitates better geographical searching. In addition, custom bounding boxes can be added to further describe the information resource. Note that bounding boxes may be different than the organization link. For instance, a book titled "Birds of Colorado" may have a bounding box for the state of Colorado and encompass all of the parks in Colorado. However, the book is likely not to have organization links since it does not have information specific to individual parks.

Step 8. Add Keywords and Subjects

To facilitate discovery of the reference, add additional subject categories and keywords as appropriate. For keywords, focus on those words that are not already in the title or description of the reference.

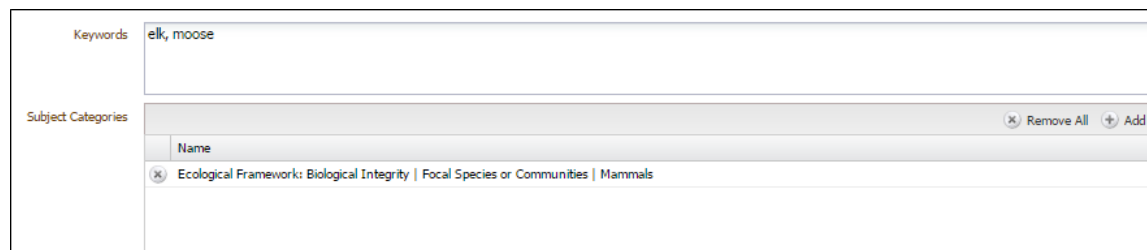


Image 13: Add keywords and subject to the search.

Step 9. Optionally Add Taxonomy

References can be linked to zero or more biological taxa. Link taxa by name, using scientific or common names.

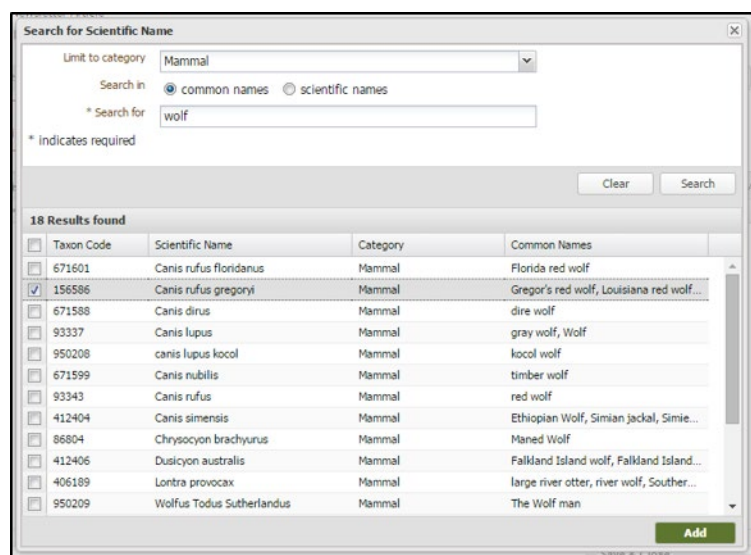


Image 14: Add a taxonomy to the search.

For advanced users already familiar with the NPS tax codes, they can be added directly.

Step 10. Close Editing Session

References are always in one of three possible states:

- **Draft** - This means the reference is still being edited (e.g., the metadata is incomplete) and is not ready for discovery, viewing, or access beyond the owners of the reference.
- **Active** - Active references are those where the reference owners have determined that the metadata is complete and accurate. An active reference is synonymous with being published, and is available to the NPS and in some cases the public (depending on the defined access level).
- **Inactive** - Inactive References are those where the owner has determined that the reference is no longer of value and should no longer be discoverable/accessible to the NPS and public. Even though inactive references are not accessible to anyone except the references' owners (inactive references never truly disappear). Generally, references should only be inactivated for the following cases:
 - A reference was determined to be duplicate of another reference and does not have any associated files or links
 - The references was not created by the NPS and the utility of the information resource is no longer clear.¹

¹ For instance, a general 20 year old grassland management guide by the Department of Agriculture.

When ending the editing session, there are three options:



Image 15: Close a reference.

- **Activate** – Save changes and set reference to active status.
- **Draft** – Save changes and set reference to draft status.
- **Inactivate** – Save any changes and set reference to inactive status