



Data Store User Guide

How to Clone a Reference

This document describes the purpose and workflow for using one reference as a template to create another reference from the Actions menu or when Adding a New Version.

Background

Why Clone?

Cloning is a useful tool in cases where an existing reference has attributes very similar to a new one you want to create.

There are two reasons why you should clone a reference.

- When it would be faster to edit an existing reference than it is to create a new
- When a new version of an existing reference needs to be created

What Happens when Cloning?

When cloning a reference, some of the fields from the existing reference will be copied over to the new reference.

Specific fields copied depends on how you clone your reference.

When cloning an existing reference, the following fields in the new reference will be copied over:

- **Core Metadata Elements** (e.g., title, description, authors, for or by NPS)
- **Permissions and Visibility Metadata Elements** (e.g., reference access level, Sensitivity Justification)
- **Links to Park Units**
- **Geospatial Bounding Areas**
- **Keywords**
- **Subject Categories**
- **Taxonomy**

These fields will NOT be copied to the new Reference:

- **Reference Code** - The new reference will have its own new reference code.
- **Files and Links** - Files and links are not copied
- **Quality of the Information Source Being Described by this Reference** – This is the quality of the associated digital file, external link, or web service
- **Child References** - These are not copied. For example, cloning a book reference does not automatically create new book chapter records. However, when cloning a book, the link to the book series will be preserved
- **Related Projects** - No assumption is made that the new reference is created by the same project

When **cloning** from the Actions button, you may optionally select these metadata fields:

- **Reference ownership** - Because any user can clone a reference, the person doing the cloning will be on the list of reference owners of the new reference regardless of the method of cloning selected. The existing reference owners are optionally copied over, when the user selects the Clone Reference from the Reference Action button. Selecting Clone Reference from the Reference Version History Tab, existing owners will be copied over.
- **Cross reference links** – References that were cross referenced from the original reference may or may not need to be included in the new reference.

When cloning from the **Version History Add Version** button the following metadata fields are added:

- **Reference ownership** – This includes the owners of the existing reference and the person doing the cloning.
- **Cross reference links**- Data Store References that are included in the See Also list on the Reference Profile.

How to Clone a Reference when cloning an existing reference because it is faster to edit an existing reference than it is to create a new (Actions | Clone)

Step 1. Locate the Reference to Use as the Template

Find and open the reference that contains information you want to replicate in a new reference. Use any of the search options for find the reference in your dashboard.

Step 2. Select Clone Option from the Actions button

From the reference profile, select the Clone option under the Actions button in the top right of the window. You don't need to own a reference to clone it, however, the Reference must be **Active**.

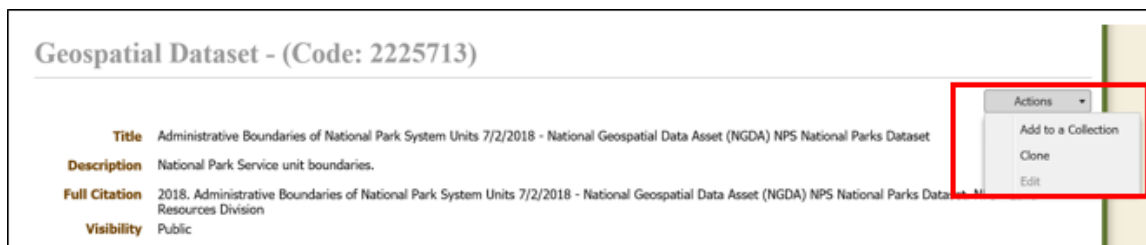


Image 1: Clone a reference.

Step 3. Select the metadata fields to copy to the new reference

Note the metadata fields that will change on the cloned reference identified in the Clone the Reference pop up window. Select any optional metadata fields you want to copy to the new clone reference.

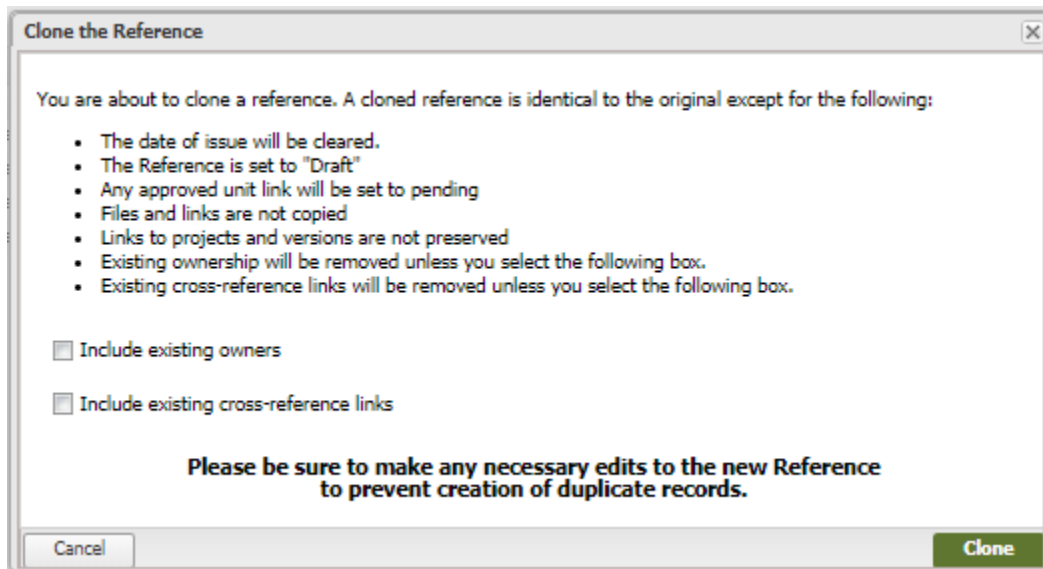


Image 2 Clone the Reference pop up window

Step 4. Change or Add Metadata Fields as Needed

Make modifications as needed to the new, cloned reference. Any changes you make to the new reference will not affect the reference you used as the template.

Once all metadata is changed as needed, save and/or Activate the reference. You will now have the original reference and the new cloned reference.

Be aware that the Cloned Reference will metadata fields will clear some, and copy others.

- The date of issue and content date will be cleared
- The Reference is set to "Draft"
- All Park Unit codes not set to Denied will be copied over
- Files and Links are cleared
- Justification of non-public file access:
 - Copyrighted, Proprietary or Other Distribution Restrictions is set to NONE
 - Quality of the Information Source Being Described by this Reference is set to UNKNOWN
- Links to projects or programs and versions are not preserved
- Person creating the clone will be added as an owner
- Existing Ownership will be removed, unless you check the Include existing owners checkbox
- Existing cross-reference links will be removed, unless you check the Include existing cross-reference link checkbox
- For or By NPS will be copied over
- Permissions are copied over

How to Clone a Reference when Adding a New Version

Step 1. Edit the Reference you want to version by cloning

Before you can clone a reference, it must be set to Active.

- Locate the reference you want to create a clone by adding a new version.
- Edit the reference you want to clone. Select Actions | Edit.

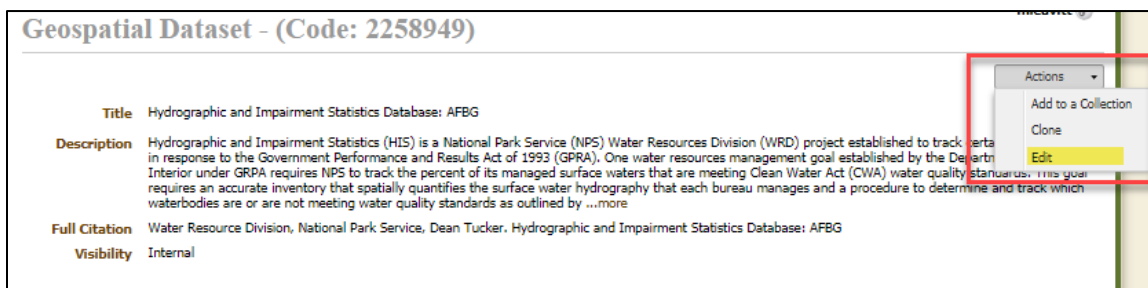


Image 3 Actions Menu

Step 2. Clone the Reference and add it as a new version to your reference

- Click on the Version History tab
- Click the Add button from the Versions section, observe the Version Management window displays.
- Click on the '**Clone the Reference to create a New Version**'
- Type in the reason why you are adding a new version in the Notes field. The Notes field is required.
- Click the Submit button to create a clone, and add it as a new version to the reference.

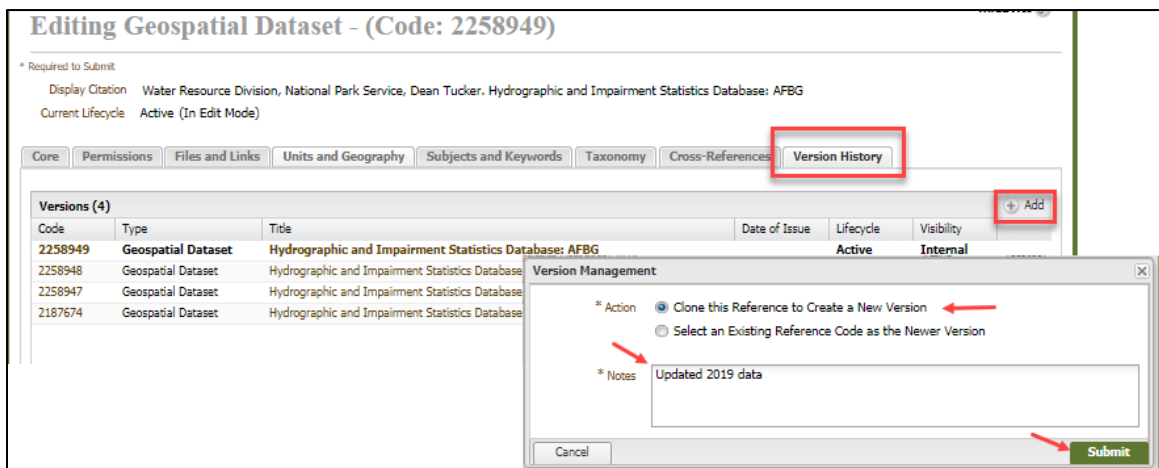


Image 4: Clone a reference.

Step 3. Change or Add Metadata fields as needed

The new version is created, and appears in the version history.

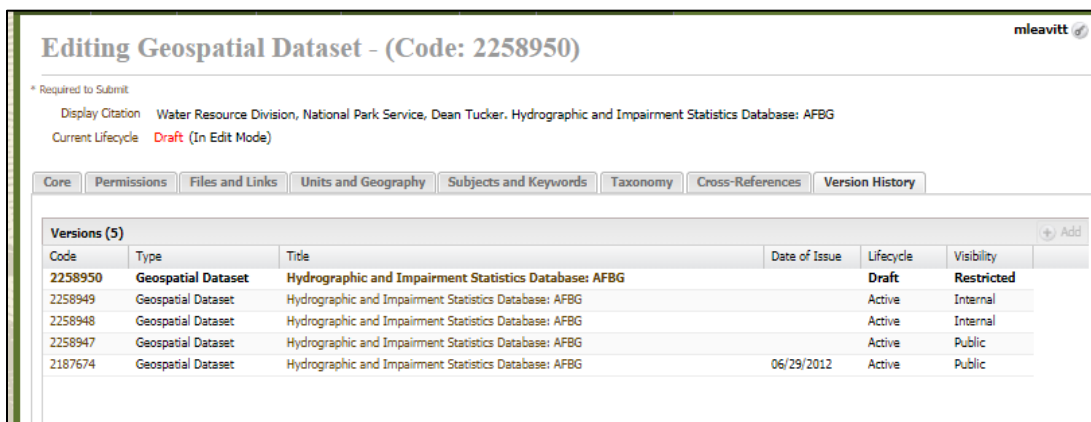


Image 5 New reference added as a new version to the cloned reference

Make modifications as needed to the new reference. Any changes you make to the new reference will not affect the reference you cloned.

The new reference metadata fields will have the following changes:

- The date of issue and content date will be cleared
- The new reference is set to "Draft"
- All Park Unit codes not set to Denied will be copied over
- Files and Links are not copied over
- Justification of non-public file access:
 - Copyrighted, Proprietary or Other Distribution Restrictions is set to NONE
 - Quality of the Information Source Being Described by this Reference is set to UNKNOWN
- **Links to projects or programs and versions are preserved**
- Person creating the clone will be added as an owner and the existing Ownership will be kept
- Existing cross-reference links will be kept
- For or By NPS will be copied over
- Permissions are copied over