



Adding Series References in DataStore 4.0

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Summary

This informational document provides information to assist when adding series items such as journal articles or newsletter articles to DataStore Version 4.0 and higher.

Change Log

Revision Date	Author	Changes Made	Reason for Change	Release	New Version #

Introduction

The release of DataStore 4.0 in December 2025 changed the way series items (newsletter, newspaper, and journal articles, book chapters, conference proceeding papers, and published report sections) are handled. Previously, DataStore users creating a new record for these types of references were allowed to manually type in parent and grandparent information such as journal issue or journal name.

With the 4.0 release, users are still allowed to manually add information, but the reference will not activate properly and throws an error (Figure 1). Please follow these instructions to successfully add and activate these types of references.

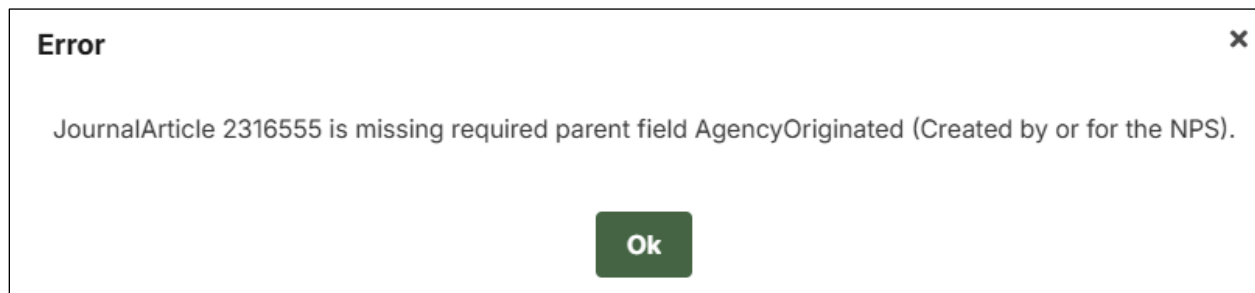


Figure 1. Sample of error that appears when series type references are not activating properly.

If you run into other issues, or these steps don't fix your issue, please send an email to NRSS_DataStore@nps.gov for assistance.

Series Background

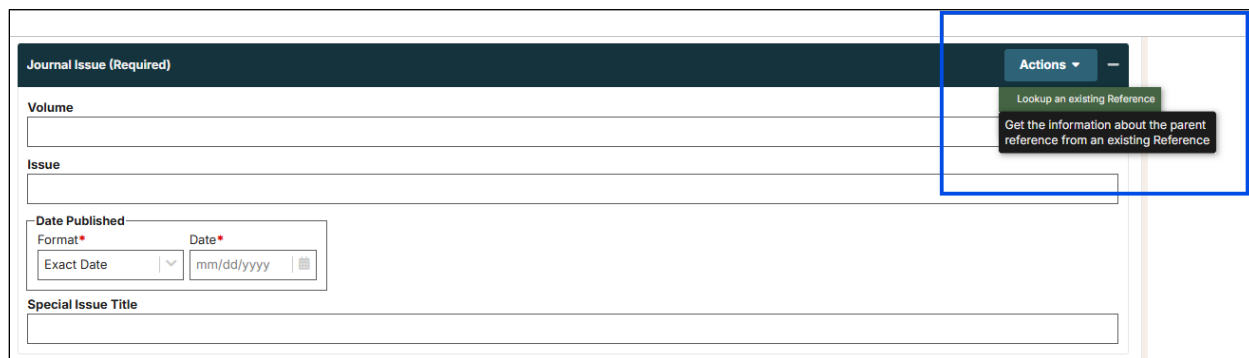
Series-type references were created in DataStore to group reference types similar to periodicals. Using journal articles as an example, a 'grandparent' reference was created to link all issues of that journal. Separate references were then created for each 'Issue' to group articles in each issue. In a perfect DataStore world, a [Journal](#) reference would exist, and contain links to all [Issues](#) in that journal (Related Journal Issue link at the bottom of the left navigation in the Journal reference) and in each [Issue](#) reference, a link to each article in that issue (Related Journal Article on the bottom left of the navigation pane in the Issue reference). With this hierarchy, you can easily see all articles in an issue, or all issues in a journal.

Manually entering journal and issue information works around this intended hierarchy and removes the links between child, parent, and grandparent references. The ability to create parent and grandparent references was limited to DataStore administrators several years ago to eliminate the creation of duplicate parent and grandparent references and provide cleaner series curation. DataStore users have gradually shifted to manually entering information instead of searching for existing references to link or having admins create parent references, thus circumventing the hierarchy and resulting in a 'spaghetti bowl' of disjointed series references.

Sample Reference

Using [NPS Datastore - Shifting Gears: Leveraging Monitoring Data to Move from Weather to Ecological Forecasts](#) (a journal article) as an example:

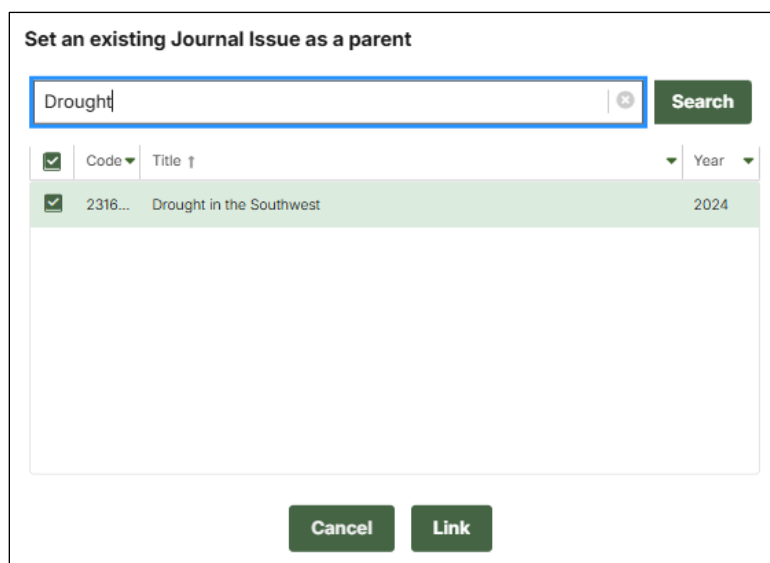
When creating a new reference, in edit mode, information on the 'Core' tab for the article is entered as usual. When you get to the 'Journal Issue' section of the page, under 'Journal Issue (Required)', click the 'Actions' button, and 'Lookup an existing Reference.'



The screenshot shows a form titled 'Journal Issue (Required)'. It contains fields for 'Volume', 'Issue', 'Date Published' (with a 'Format' dropdown set to 'Exact Date' and a 'Date' field with a calendar icon), and 'Special Issue Title'. On the right side, there is an 'Actions' button with a dropdown arrow. A blue box highlights the 'Actions' button and its dropdown menu, which includes the option 'Lookup an existing Reference'. A tooltip next to this option reads: 'Get the information about the parent reference from an existing Reference.'

Figure 2. Graphic showing the 'Actions' button used to look up an existing reference.

This article is part of the [Intermountain Park Science Journal, Drought in the Southwest Issue](#) of the [Intermountain Park Science](#) journal, so I'll search for 'Drought.' If you have the DataStore reference code for the issue, you can also enter it here to search by code.



The screenshot shows a search interface titled 'Set an existing Journal Issue as a parent'. It features a search bar with the text 'Drought' and a 'Search' button. Below the search bar is a table with the following columns: a checkbox, 'Code', 'Title', and 'Year'. One result is displayed:

☒	Code	Title	Year
☒	2316...	Drought in the Southwest	2024

At the bottom of the form are 'Cancel' and 'Link' buttons.

Figure 3. Graphic showing search results with proper issue titles.

Check the box next to the issue you want and click 'Link.' This will pull all the issue and journal metadata information in from the issue and journal references. At this point, the reference should activate properly. If it doesn't, the existing Issue and/or Journal reference need to be

updated to make sure the required 'By or for NPS' box is checked (on the core tab of the Journal and Issue reference). This field became mandatory with the release of 4.0.

Unfortunately, like autocorrect, it's not always that easy. There are several Issue type references created over the years that didn't use the 'Special Issue Title' field (on the core tab in the 'Issue' reference type), so the title comes up blank. If I search for 'Fire' instead of 'Drought' I get a mixed bag of vague and unhelpful results.

☐	Code	Title	Year
☐	2070276		2005
☐	2077673		2005
☐	2212276		1998
☐	2217177	Connections to Natural and Cultural Resource Studies in Alaska's...	2011
☐	2215497	Fire Equipment	2008
☐	2301089	Preservation in Print March 2017	2017

Figure 4. Graphic showing 'Issue' search results with blank titles.

Complicating the issue is a current bug that causes Issue and Journal (and equivalent series types like Newsletters and Newspapers) to not show up in the search filter when doing an advanced search in DataStore. This bug is fixed in the upcoming release 4.0.2.

If a reference does not exist for the parent and grandparent (e.g., Issue and/or Journal, Issue and/or Newsletter) for your article, they will have to be created by a DataStore admin. Send a request to NRSS_DataStore@nps.gov. For clarification, the end user ONLY needs to link an article (child reference) to an issue (parent). The issues (parent references) are linked to the grandparent records when they are created by admins.

If the parent or grandparent reference need to be updated to change the 'By or for NPS' setting, send a link for that reference to NRSS_DataStore@nps.gov.