# How to Create a Reference

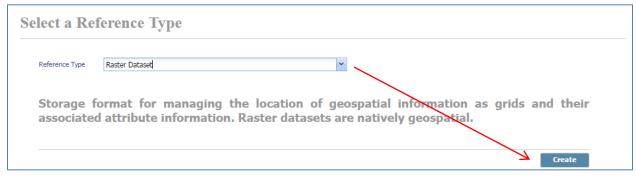
This module walks through the process of creating a Reference for a raster dataset.

## Step 1. Select the Option to Create a Reference



## Step 2. Select the Appropriate Reference Type

Select from the combo box or start typing to filter the list.



Once the appropriate Reference Type has been selected, click on the 'Create' button to continue. The Editing window opens 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).

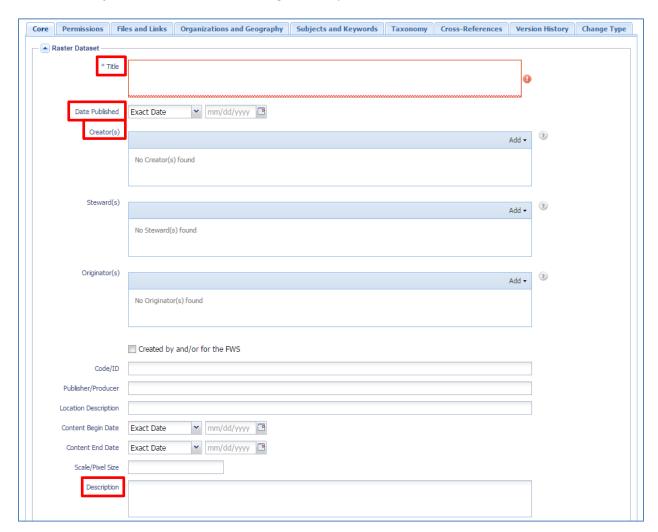


#### **Step 3. Complete the Core Tab**

Add information to the fields in the Core tab. Note that the specific number of fields and their exact labels may differ depending on the type of information you are describing.

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

- **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. Generated titles should be placed in brackets [].
- Date of Issue/Date Published When was 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.



When possible and where appropriate, complete all of the other fields. However, do not feel obligated to just fill in the fields with meaningless information (e.g., 'Unknown', 'N/A').

#### **Step 4. Save Your Work**

Work can be at any time by hitting the 'Save' button. Selecting the Save option will not close your edit session.



## **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 = FWS only)
- File Access Level Who has permission to download any attached digital files, assuming there
  are some
  - o **Public** = Everyone
  - o Internal = FWS only
  - Specific Individuals = Restricted to designated individuals

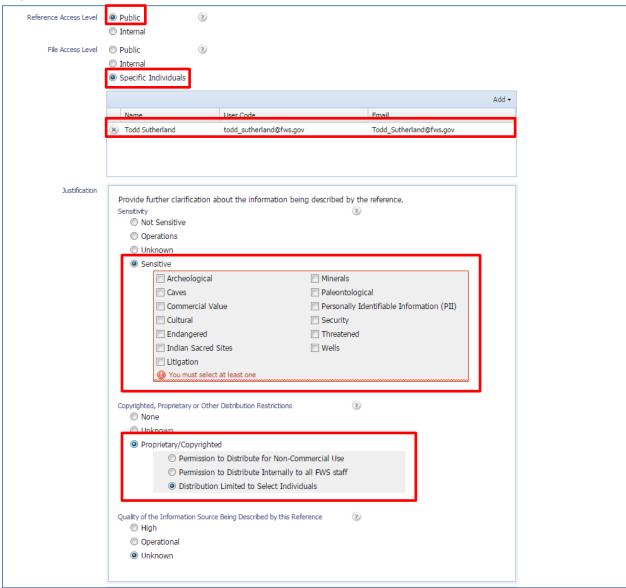
Please note that all new References are defaulted to 'Internal' for both the Reference and File Access Level. This is easily modified if not an appropriate designation.

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).

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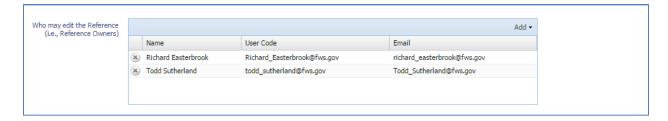
However, if access is limited to selected individuals, more options are provided to qualify the reasons why:



In this case, it is possible to give an individual permission to access the file (e.g., Todd Sutherland) 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.



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

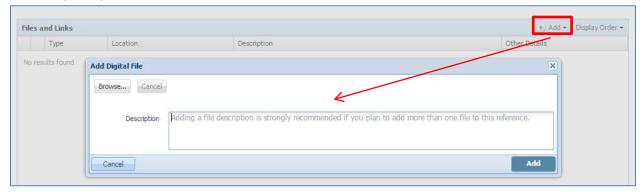


• Allow Data Stewards to Edit the Record - Allow Data Stewards to review and improve the quality of the Reference, if needed.



## 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.



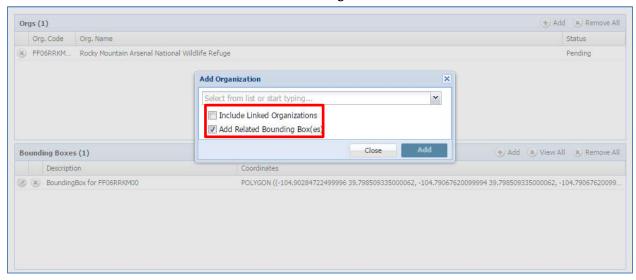
A Reference can have as many files, external links or web services, there is no limit. The order of these files/links/services is controlled by dragging them in the grid and then selecting the 'Set' option from the Display Order button.

## Step 7. FWS Organizations and Geography

Select the Organizations and Geography Tab. If, and only if, the information resource contains information specific to an FWS organization (e.g., refuge, complex, office, region), should it be linked to

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the respective organization(s). Linking to an organization only when it is truly organization-specific, ensures that we do not diminish the value of its meaning.



In cases where you wish to link a Reference to multiple refuges (e.g., all refuges in a complex), select the 'Include Linked Organizations' option.

By default, bounding boxes for organizations (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 refuges in Colorado. However, the book is likely not to have organization links since it does not have information specifically about the refuge organizations.

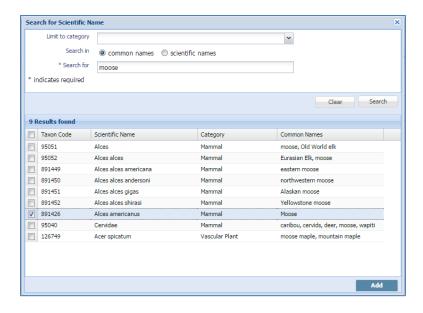
# Step 8. Add Keywords and Subjects

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



# **Step 9. Optionally Add Taxonomy**

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



For advanced users already familiar with the FWS taxa codes, they can be added directly.

#### **Step 10. Close Editing Session**

References are always in one of three possible states:

- **Draft** This implies the Reference is still being edited (e.g., the metadata is incomplete) and is not ready for discovery/viewing/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, therefore, is synonymous with being
  published, and is available to the FWS 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 FWS and public. Even
  though inactive References are not accessible to anyone except the References' owners
  (inactive References never disappear). Generally, References should only be inactivated for the
  following cases:
  - A Reference was determined to be duplicate of another
  - o The Reference does not have any associated files or links
  - The References was not created by the FWS and the utility of the information resource is no longer clear. <sup>1</sup>

When ending the editing session, there are three options:



<sup>&</sup>lt;sup>1</sup> For instance, a general 20 year old grassland management guide by the Department of Agriculture.

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