



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

The screenshot shows the ServCat homepage. The top navigation bar includes links for Home, Search, Reports, Create, My Content, OPOC, and Administrator. The 'Reference' link is highlighted with a red box. The main content area displays 'Welcome to ServCat' and a description of the system. A 'Quick Search' button is visible at the bottom.

Step 2. Select the Appropriate Reference Type

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

The screenshot shows the 'Select a Reference Type' form. The 'Reference Type' dropdown menu is set to 'Raster Dataset'. A red arrow points from the dropdown to the 'Create' button. The description below the dropdown reads: 'Storage format for managing the location of geospatial information as grids and their associated attribute information. Raster datasets are natively geospatial.'

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).

The screenshot shows the 'Editing Raster Dataset - (Code: 60024)' form. The 'Core' tab is highlighted with a red box. Other tabs include Permissions, Files and Links, Organizations and Geography, Subjects and Keywords, Taxonomy, Cross-References, Version History, and Change Type. The form also displays fields for 'Display Citation' (Untitled Raster Dataset) and 'Current Lifecycle' (Draft (In Edit Mode)).

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.

The screenshot shows the 'Core' tab of a metadata form for a 'Raster Dataset'. The form has several tabs at the top: Core, Permissions, Files and Links, Organizations 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 the label and a red dashed border around the input area.
- Date Published**: A dropdown menu set to 'Exact Date' and a date input field with a red box around the label.
- Creator(s)**: A text input field with a red box around the label and an 'Add' button.
- Steward(s)**: A text input field with an 'Add' button.
- Originator(s)**: A text input field with an 'Add' button.
- Created by and/or for the FWS**: A checkbox.
- 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 large text input field with a red box around the label.

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
 - **Public** = Everyone
 - **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).

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 FWS staff
☐ Distribution Limited to Select Individuals

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

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

The screenshot shows a web form with several sections. The 'Reference Access Level' section has radio buttons for 'Public' (selected), 'Internal', and 'Specific Individuals'. The 'File Access Level' section has radio buttons for 'Public', 'Internal', and 'Specific Individuals' (selected). Below this is a table with columns 'Name', 'User Code', and 'Email'. The table contains one entry: 'Todd Sutherland', 'todd_sutherland@fws.gov', and 'Todd_Sutherland@fws.gov'. The 'Justification' section has a heading 'Provide further clarification about the information being described by the reference.' and a 'Sensitivity' section with radio buttons for 'Not Sensitive', 'Operations', 'Unknown', and 'Sensitive' (selected). The 'Sensitive' section is expanded, showing a grid of checkboxes for various categories: Archeological, Caves, Commercial Value, Cultural, Endangered, Indian Sacred Sites, Litigation, Minerals, Paleontological, Personally Identifiable Information (PII), Security, Threatened, and Wells. A red box highlights this grid, and a red error message at the bottom says 'You must select at least one'. Below the grid is a 'Copyrighted, Proprietary or Other Distribution Restrictions' section with radio buttons for 'None', 'Unknown', and 'Proprietary/Copyrighted' (selected). The 'Proprietary/Copyrighted' section is expanded, showing three options: 'Permission to Distribute for Non-Commercial Use', 'Permission to Distribute Internally to all FWS staff', and 'Distribution Limited to Select Individuals' (selected). At the bottom is a 'Quality of the Information Source Being Described by this Reference' section with radio buttons for 'High', 'Operational', and 'Unknown' (selected).

Reference Access Level ☒ Public ☐ Internal ☐ Specific Individuals

File Access Level ☐ Public ☐ Internal ☒ Specific Individuals

Name	User Code	Email
Todd Sutherland	todd_sutherland@fws.gov	Todd_Sutherland@fws.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 ☐ Security
☐ Endangered ☐ Threatened
☐ Indian Sacred Sites ☐ Wells
☐ Litigation

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 FWS staff
☒ Distribution Limited to Select Individuals

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

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.

Who may edit the Reference (i.e., Reference Owners)			Add ▾
	Name	User Code	Email
✕	Richard Easterbrook	Richard_Easterbrook@fws.gov	richard_easterbrook@fws.gov
✕	Todd Sutherland	todd_sutherland@fws.gov	Todd_Sutherland@fws.gov

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

Additional Use Constraints	Additional Use Constraints/Recommendations/Qualifications
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- **Allow Data Stewards to Edit the Record** - Allow Data Stewards to review and improve the quality of the Reference, if needed.

Allow Data Stewards to Edit this Record	<input checked="" type="radio"/> YES, allow management of this record as needed <input type="radio"/> NO, owner(s) will provide management of this record	?
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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.

The screenshot shows the 'Files and Links' section with a table containing columns for Type, Location, Description, and Other Details. A red box highlights the '+ Add' button in the top right corner of the table. A red arrow points from this button to the 'Add' button in the 'Add Digital File' dialog box, which is open in the foreground. The dialog box has a 'Browse...' button, a 'Description' field with a placeholder text, and 'Cancel' and 'Add' buttons.

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

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.

Search for Scientific Name

Limit to category:

Search in: ☒ common names ☐ scientific names

* Search for:

* Indicates required

Clear Search

9 Results found

<input type="checkbox"/>	Taxon Code	Scientific Name	Category	Common Names
<input type="checkbox"/>	95051	Alces	Mammal	moose, Old World elk
<input type="checkbox"/>	95052	Alces alces	Mammal	Eurasian Elk, moose
<input type="checkbox"/>	891449	Alces alces americana	Mammal	eastern moose
<input type="checkbox"/>	891450	Alces alces andersoni	Mammal	northwestern moose
<input type="checkbox"/>	891451	Alces alces gigas	Mammal	Alaskan moose
<input type="checkbox"/>	891452	Alces alces shirasi	Mammal	Yellowstone moose
<input checked="" type="checkbox"/>	891426	Alces americanus	Mammal	Moose
<input type="checkbox"/>	95040	Cervidae	Mammal	caribou, cervids, deer, moose, wapiti
<input type="checkbox"/>	126749	Acer spicatum	Vascular Plant	moose maple, mountain maple

Add

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
 - 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.¹

When ending the editing session, there are three options:

Cancel Save Save & Close

Inactivate Draft Activate

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