InPort

NMFS Enterprise Data Management Program

InPort v. 2.0
User Guide

NOAA Fisheries, National Fisheries Information System

InPort Catalog User Guide

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Send comments and feedback to karen.sender@noaa.gov

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Acknowledgements

The InPort project was an outgrowth of efforts to support the Pacific Islands Fisheries Science Center, Coral Reef Ecosystem Division (CRED) requirement to submit formal FGDC-like metadata to the Coral Reef Information System (CoRIS) metadata warehouse. With its large number of data collection efforts, it quickly became apparent that a system was needed to store and manage the information about the design, history, people, issues, data quality, and various other details about those data collections so that when any data product was published, the creation of the CoRIS metadata record would be timely, accurate, and efficient. The initial designers of InPort made every effort to search for existing tools that could truly capture and manage the many details about scientific data collections – throughout the data management life-cycle. The InPort design was greatly influenced by the excellent work at the Environmental Protection Agency with their Environmental Data Registry (EDR) and Environmental Information Management System (EIMS) and the U.S. Fish and Wildlife regarding data standards. We are also grateful for the help and metadata wisdom of Jim Sargent (NMFS/OCIO), Michael Parke (NMFS/PIFSC), Peter Schweitzer (USGS), and Doug Hamilton (CoRIS).

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1. Introduction

InPort Overview

The FIS InPort Catalog gives NOAA Fisheries and its state and regional partners the capability to share essential information about fisheries data. InPort stores metadata, information about data. InPort, for example, can help answer the following questions:

- What logbook data exist for US fisheries?
- What time periods and geographic areas are covered by the logbook records?
- Who controls the data and how do I contact that individual or organization?

InPort (**In**formation **Port**al) is one of the initial, bootstrap systems planned for the National Fisheries Information System (FIS) to give NOAA Fisheries and its partners the capability to catalog and search fisheries data holdings. The InPort data catalog can contain the information needed to understand and use fisheries data. InPort does not store fisheries data itself.

InPort will store metadata, information about data. This will include descriptions of structure and content. InPort will not, however, store any of the data. For example, it might say that SEFSC has logbook data from 1986 to the present and describe tables and column descriptions. But InPort will not store the logbook data. In InPort, metadata includes information that helps explain what is *in* the data and *how to use* the data.

InPort should include the "what, where, when, how, and who" about data holdings. InPort should store details on the quality and completeness of data, its confidentiality policies, research models, methodologies and usage constraints. It should also explain if the data is accessible, if there are any constraints on its use, and who to contact about getting the data.

InPort should function much like a library card catalog. A card catalog describes each book in the library by title, author, publisher, and publication date. It also contains a reference number to locate the book among the book shelves. By comparison, InPort should have titles, authors, publishing organizations, publication dates, and whom to contact if you wanted to use the information. InPort will also contain other details about the structure of the data.

InPort was originally described in 2003 and was funded in May 2004 under the FIS Program. See Appendix D for more information on FIS.

InPort Support

The initial roll-out of InPort, the database, web servers, and support staff will be at the NOAA Fisheries Service, Pacific Islands Fisheries Science Center. InPort will reside at the NOAA Fisheries, Office of Science and Technology in Silver Spring, MD.

Reporting Issues

Reporting of issues, comments, and ideas for improving InPort are greatly encouraged. An e-mail link to the InPort team can be found at the bottom of the InPort web pages and this document. The design of InPort has been a collaborative effort within the National Fisheries Information System Program and additional comments and feedback will ensure that our Fisheries partners benefit from its use.

Technical Support

For technical assistance on InPort tools, web site or browser technical problems, or for obtaining your account password, please contact InPort Support at:

- Tel: 305.361.4287
- E-mail: **lee.weinberger@noaa.gov**

Using the InPort User Guide

This user guide is designed to work well either in print or online. We suggest that since it is rather large and the InPort team is committed to responding to requests for corrections and additions that it is best used as an online tool. Bookmarks in the online view will aid in navigating through the document. Multiple tables of content (text, figures, instructions), an index, along with the ability to word search should allow users to quickly locate the information they seek.

User Guide Conventions

- Command - as selected from menu lists
- `Example Data` - as used in tutorials
- `Field Data` - as entered into field items
- **Field Name** - as described in an InPort tool/application
- *Form Element* - as named in an InPort tool/application
- **FORM NAME** - as a named InPort tool/application
- **Glossary Term** - as listed in the glossary in the appendix
- **Web link** - showing a url address

Metadata Assistance

There are a multitude of resources on how to document data and we include some of those references in Appendix B. Please note that most metadata tutorials focus on documenting data end products such as maps, images, reports, and data download files. While InPort was designed to facilitate the generation of FGDC metadata records which can be submitted to metadata repositories such as the Coral Reef Information System (CoRIS) and the FGDC Geospatial Data Clearinghouse, InPort is focused on managing information about the entire life-cycle of our data collections, from which many data products are produced and distributed with its appropriately formatted metadata record. That metadata record will most typically be in FGDC, NASA, or Dublin Core format.

InPort Functions

InPort is described as a data catalog which holds descriptions of fisheries related data. For example:

- Pacific Islands logbook data, 1990 to present
- Southeast Region landings data, 1960 to present
- N and S Pacific Albacore Troll and Bait Boat (1952 to present)

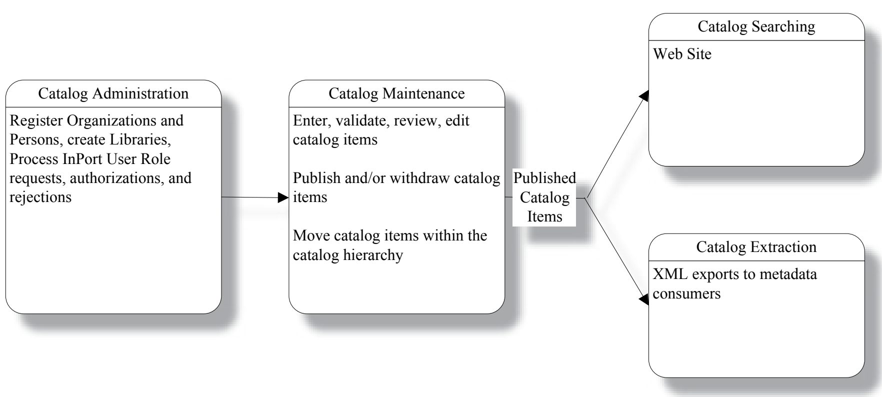
The InPort catalog is comprised of multiple individual Metadata Libraries. A Metadata Library is associated with one organization though the Organization-Library pair may have sub-organizations under them. Libraries contain details about an organization's information items, including projects, data sets (databases), and data entities (e.g., tables, files, data reports, etc.), documents, and procedures. Each item in the Library hierarchy is called a *Catalog Item.* The Library itself can be thought of as the root-node or base of the hierarchy.

The InPort Catalog also maintains information about the people and organizations that support the individual information items, called Catalog Items, being cataloged and as InPort Users and Organizations that support the InPort Catalog system.

Catalog Items may be described in more detail by standard, descriptive modules called Detail Modules (e.g., time frames, geographic areas, attributes, etc.).

The InPort system maintains functions for administration of InPort persons and organizations and for the maintenance, searching, and extracting of catalog metadata.

1.1. InPort Functional Areas



Catalog Administration

InPort **Catalog Administration** includes those tasks performed by the InPort Administrator to create Metadata Libraries, manage Metadata Librarians assigned to each Library, and manage reference code lists that support the Catalog. The InPort Administrator also defines the publication workflow and catalog hierarchy rules.

Library Administration includes those tasks performed by the Metadata Librarians to process new InPort users and user accounts for their InPort Library. Librarians are also responsible for maintaining a high level of quality and consistency in cataloging and describing their organization's information items.

Catalog Maintenance

InPort **Catalog Maintenance** includes those tasks performed by a Library's Librarians, Authors, Publishers, and Readers to enter, validate, review, edit, and approve the metadata for Catalog Items. Catalog Items may also be moved within a catalog hierarchy, depending on the item's publication workflow state (e.g., an item cannot be moved if it is currently published).

Catalog Publication

InPort currently supports three levels of *Publication* of Catalog Items:

1. *Unpublished* but accessible to the item's Library users through the InPort tools.
2. *Published (Internally)* and InPort web accessible only to the InPort user community (i.e., requires login).
3. *Published (Externally)* and InPort web accessible to the public (no login required).

Catalog Extractions

Besides the main function of InPort to maintain complete details and history of an organization's information items, metadata in InPort will be extracted to support web portals, metadata servers, and other metadata consumers. This approach will ensure that metadata is maintained in a single repository and that metadata extractions will provide the most currently published information about the information items of interest.

InPort Catalog Content

Each **Catalog Item** is significant as metadata information needed to describe an information item. There are many different Catalog Item types.

- Metadata Library(*)
- Project
- Data Set
- Data Collection Item
- Data Entity
- Document
- Procedure

See InPort Glossary for definitions or refer to the Catalog Maintenance section of this user guide for details on each catalog item type.

(*) The Metadata Library is a special Catalog Item that represents all the currently cataloged data collection activities of an Organization.

- Each organization may have one and only one Metadata Library.
- All the metadata for an organization is arranged under its Metadata Library hierarchy
- Metadata Libraries are *root* catalog items for catalog hierarchy trees

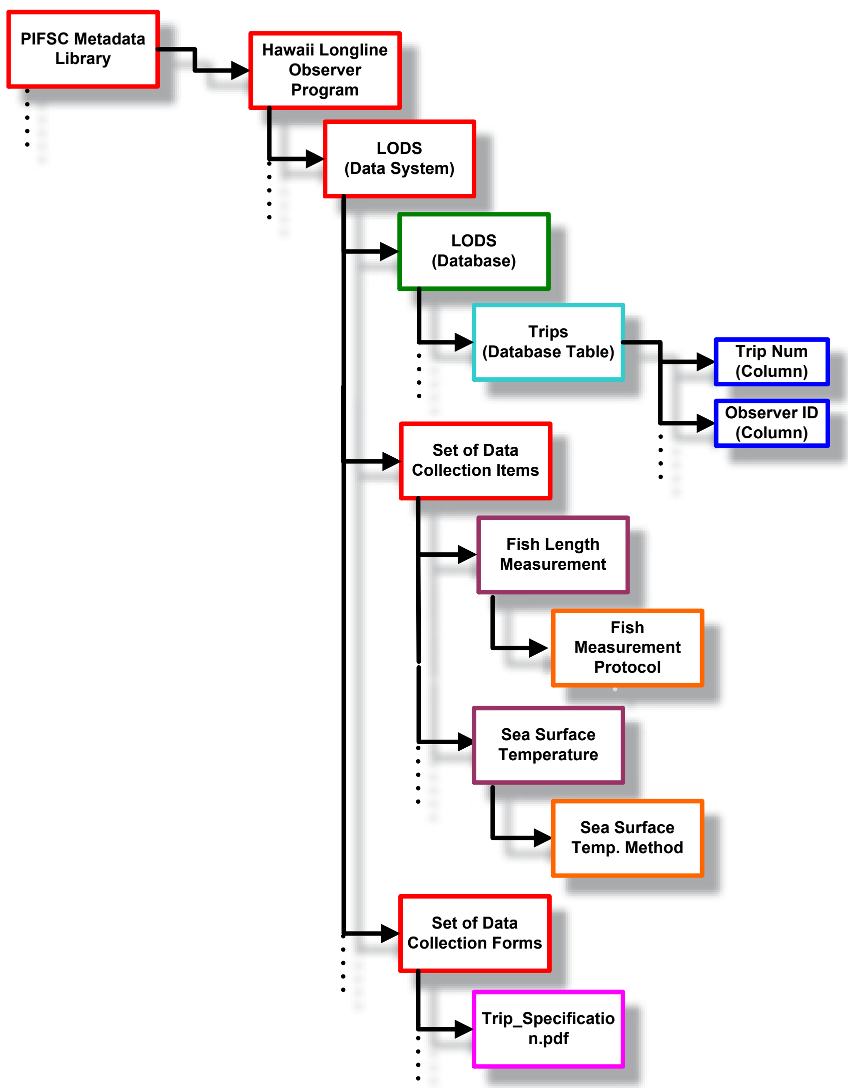
Catalog Hierarchy

Catalog items may be organized in a hierarchy according to the following rules:

- Each catalog item may belong to one-and-only-one parent catalog item
- Each catalog item may be the parent of one or more catalog items
- Each catalog item may not be the parent of itself

Figure 1.2 shows an example of a Catalog Hierarchy. This represents a small branch within a single InPort metadata library. This hierarchical organization of metadata allows metadata producers and consumers to publish and/or search for metadata from a high-level data-discovery mode and drill down to a very detailed data specification level. InPort's hierarchical and modular design also allows data managers to document their data collections as the information becomes available rather than having to wait until all information is gathered.

1.2. InPort Catalog Hierarchy

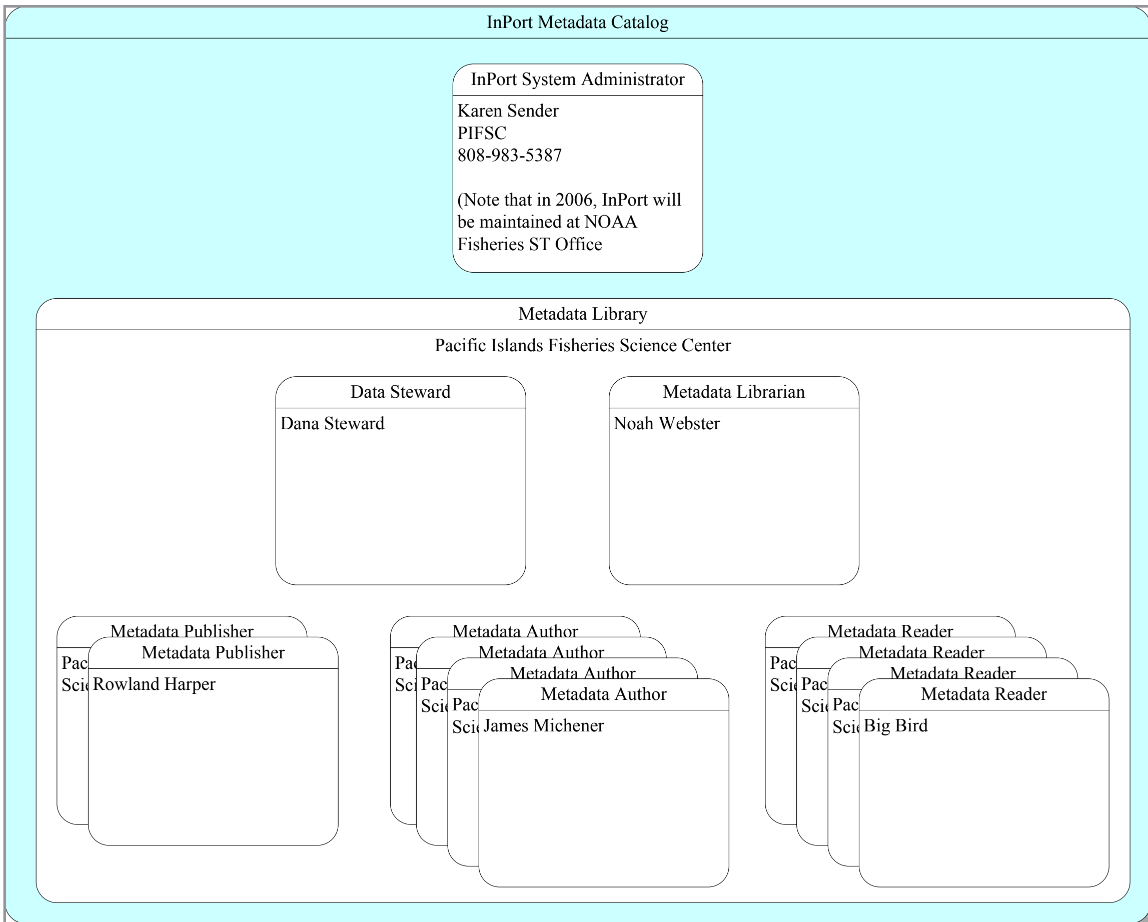


The InPort Catalog organizes Catalog Items in a hierarchy.

InPort User Roles and Responsibilities

In its current configuration, InPort supports three types of users to administer the InPort system and Libraries and three types of users for publishing items in the catalog.

1.3. InPort User Roles



There are currently six separate User Roles in InPort. These User Roles ensure that InPort users have access and editing capabilities that are granted and managed by the local InPort Librarians.

InPort User Roles for Administration

InPort Administrators

InPort Administrators have sole authority to define and maintain Publication Workflow (control states), InPort User Roles, and manage reference codes.

It is the InPort Administrator who can create Master (root-level) Organizations and their InPort Metadata Libraries, and create and manage their Librarian and Data Steward accounts.

InPort Librarians

An InPort Librarian can create and manage catalog Persons and InPort user accounts for their Metadata Library. Librarians can create and manage catalog project *User Role* requests, authorizations and rejections.

Librarians create new organizations under their Organization and can create and manage catalog project folders under their Metadata Library.

InPort Data Stewards

InPort Data Stewards have the same catalog privileges as an InPort Reader but have the ultimate responsibility of authorizing or rejecting InPort User Roles.

InPort User Roles for Publishing

InPort Publishers

InPort Publishers manage the review of metadata and ensure that quality assurance processes are completed. Publishers should give feedback and advice to InPort Authors on metadata quality and sufficiency.

Publishers are responsible for web publication, either internally or externally, and for withdrawing metadata for correction or further review. Publishers will monitor metadata issues activity and ensure that issues resolution occurs in a timely fashion.

InPort Authors

InPort Authors enter, review, and correct metadata that is in a Draft state in the Library or catalog Project for which they have been granted an *Author* role. Authors have authority to put metadata into Review/Revise state at which point the Author will no longer have edit capabilities. Authors are responsible for requesting publication review for that metadata from their Catalog Publisher.

InPort Readers

InPort Readers review catalog items through the Catalog Editor or log onto the InPort web site to search and view internally published catalog items. Readers do not have any edit abilities. Readers are responsible for reporting any metadata issues.

Metadata Quality Controls

Every effort is made to ensure that metadata for all Catalog Items is of the highest quality. Measures taken in this regard include:

- Audit fields for each metadata record which show who and when metadata records were created or modified
- Record and field item history tracking
- Tightly controlled metadata approval and publication process (workflow control) that is dependent upon InPort User Roles
- Metadata cannot be edited either in Approved or Published state

without first being Withdrawn from publication and/or being placed back in Review/Revise state.

- Metadata Review Date support to enforce annual review of metadata for continued publication.

2. Getting Started

System Requirements

Users will need to access InPort applications with one of the following internet browsers:

- Internet Exploror 7.0 (with Windows XP/Vista/Windows 7)
- Mozilla Firefox
- Google Chrome

Accessing the InPort Web Site

https://ias.pifsc.noaa.gov/inport

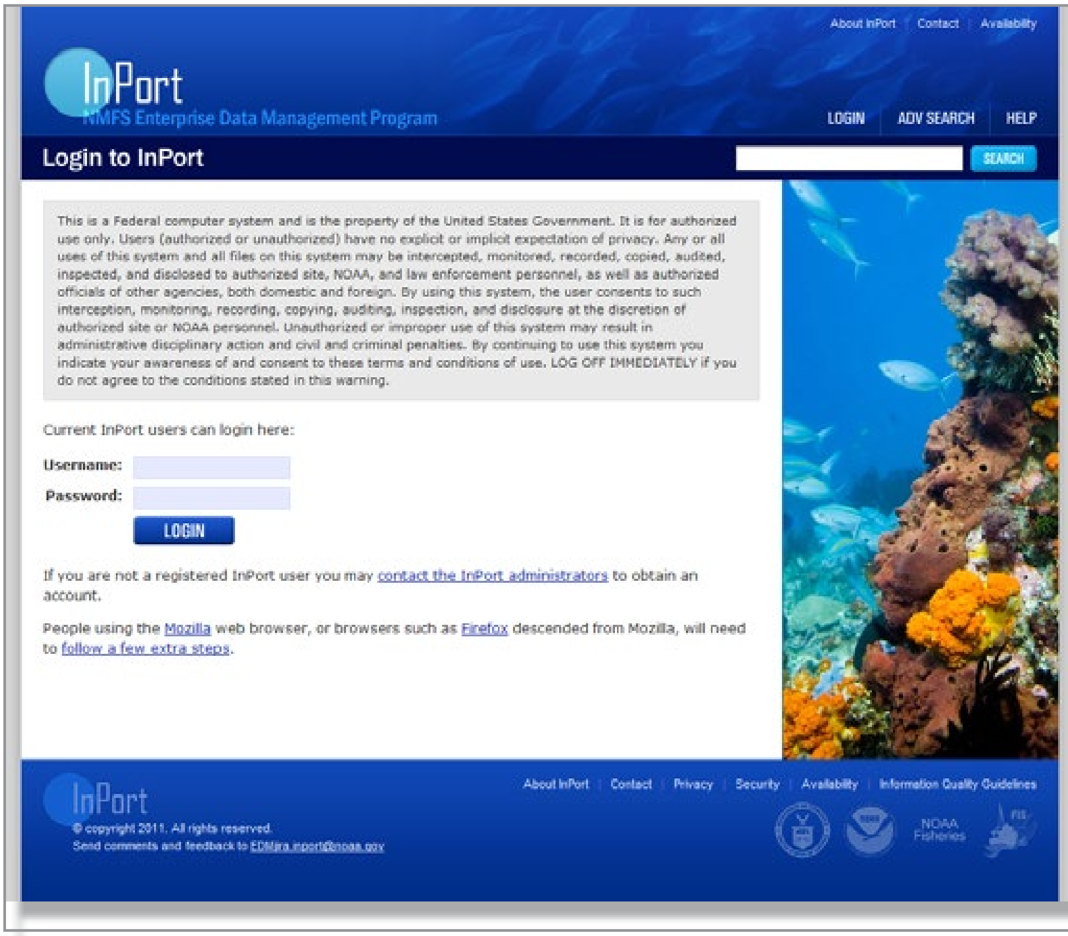
2.1 InPort Home Page

The InPort Home Page is publicly accessible for searching externally published metadata and for finding out information about the InPort system.

The InPort home page displays the current message of the day and the InPort Search text box. There is also a link for InPort User login and other links for accessing more information about InPort.

It is not necessary to have an InPort user account to search for catalog items that are published to the public (in InPort terms, Published-Externally). However, to search for catalog items that have restricted publication (in InPort terms, Published-Internally), a user login with an InPort username and password, is required. After logging in, an InPort search will return all published (Internally or Externally) catalog items. Logging in to InPort will also make the various InPort Catalog tools available to the user.

2.2 InPort Login Page

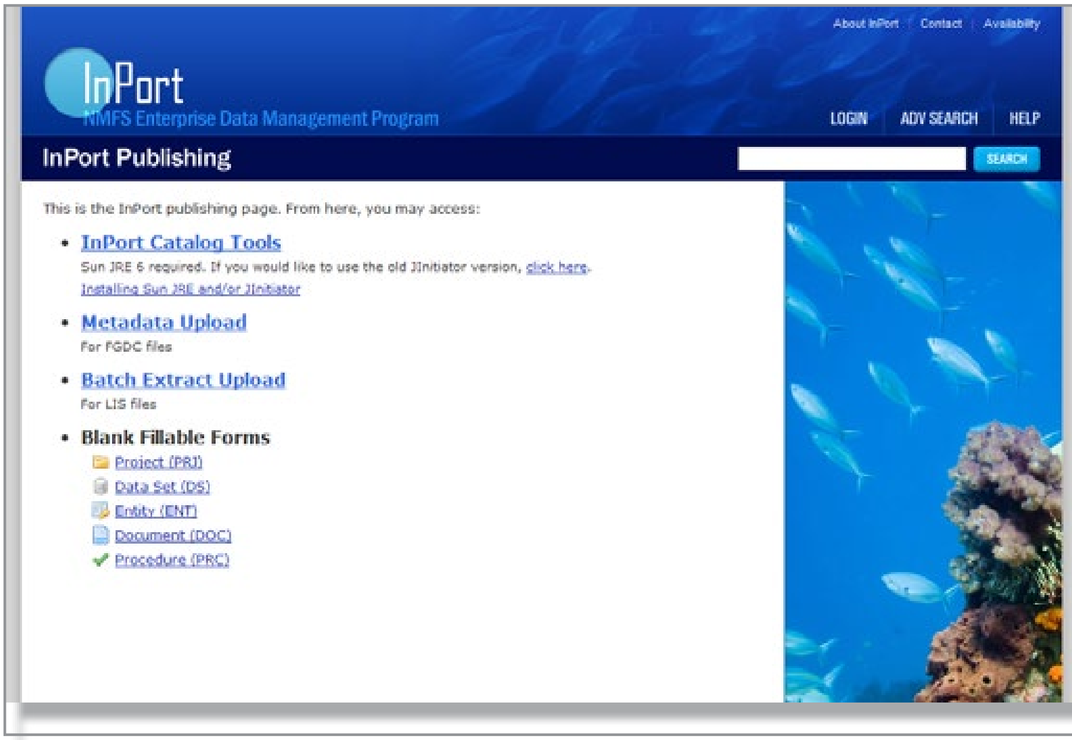


Registered InPort users need to log into the InPort web site in order to access the tools for creating, managing and publishing metadata. Users do not need to log in to search publically (externally) published metadata.

How to Log into the InPort Web Site

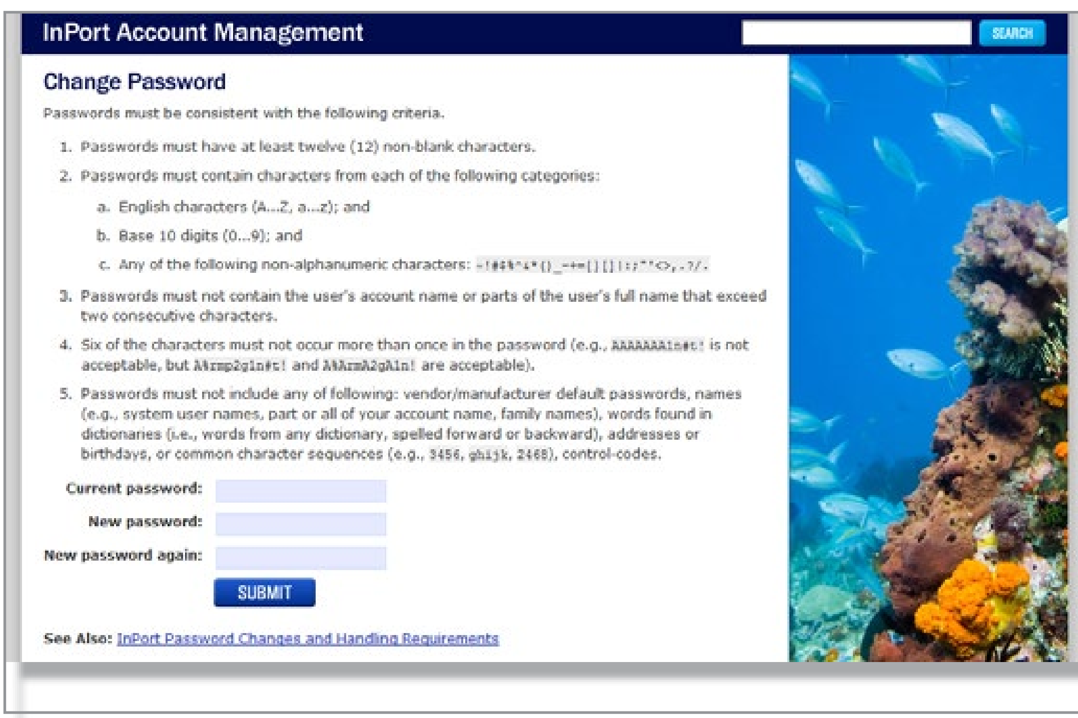
1. Click the **login** link in the upper right-hand corner of the InPort home page
2. Enter your InPort username and password (if you do not have an InPort user account, you may contact the InPort Administrator to obtain one.
3. Click the *Login* button. This will open up the InPort Publishing page

2.3 InPort Publishing Page



The InPort Publishing Page provides links to the tools for creating, managing, and publishing metadata.

2.4 InPort Account Management Page

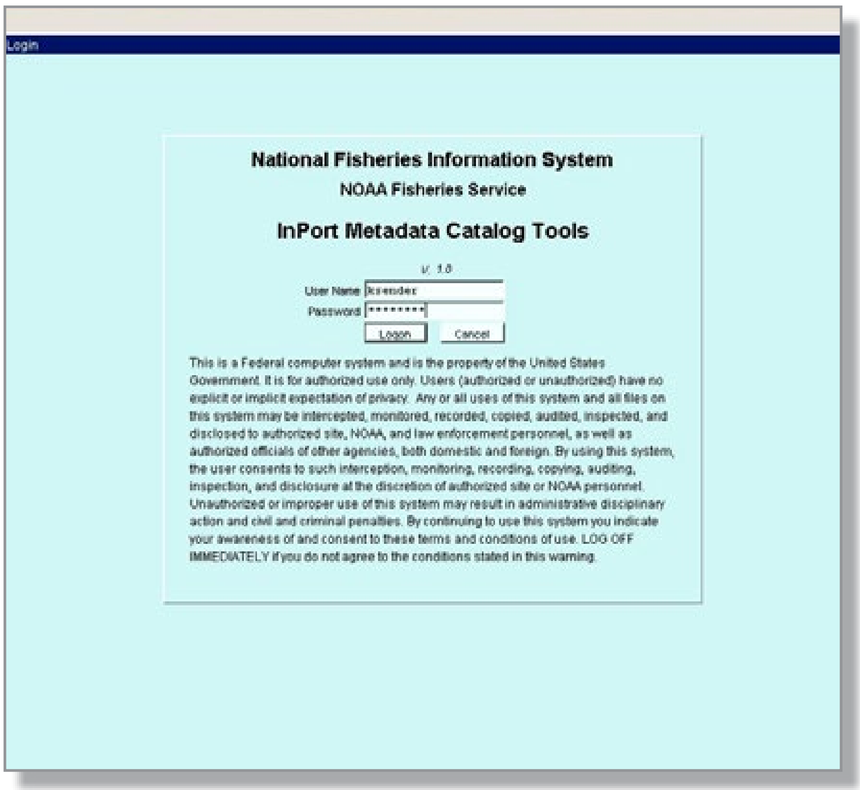


InPort users can change their login password from the InPort Account Management page which is available after logging in to the web site. InPort Librarians can also manage their user's InPort accounts using the Library Manager tool.

Accessing InPort Applications

Clicking on the InPort Catalog Tools link on the InPort Publishing page will display the application's login screen. The InPort user will be required to enter his/her username and password even though they have already logged into the InPort web site.

2.5 InPort Catalog Tools Login Screen

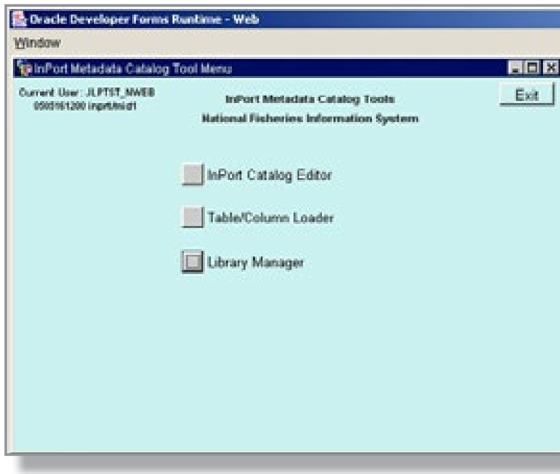


Even though the user has already logged in to the InPort web site, the user must also log in to the InPort Catalog Tools.

InPort Catalog Tools Menu

After entering a valid username and password, the InPort Catalog Tools menu will provide access to the applications to which the current user has authorized access. An InPort Librarian will have more tools available than an InPort Author, who in turn will have more tools than an InPort Reader.

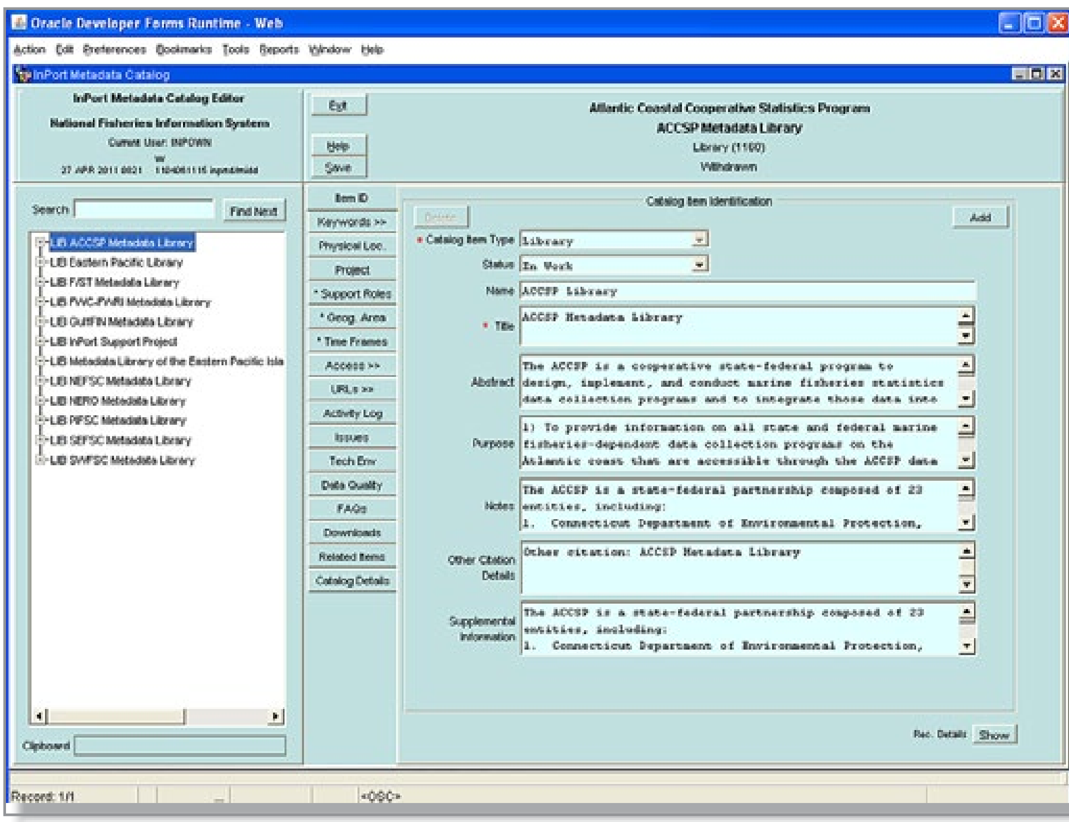
2.6 InPort Catalog Tools Menu Screen



The InPort Catalog Tools Menu is sensitive to the User Role of the currently logged in user and will thus only allow access to the tools appropriate for that user.

InPort Application Screens

2.7 Example of an InPort Application Screen (Catalog Editor)

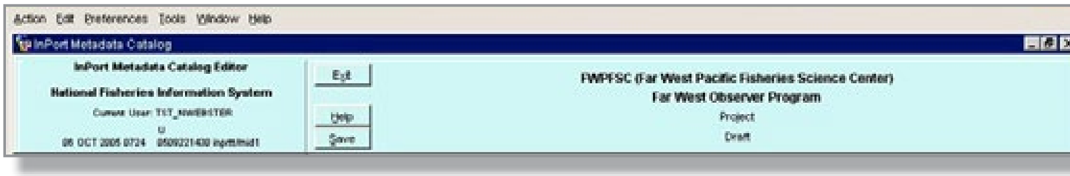


InPort applications try to have a consistent look-and-feel and layout to help the user understand the tools.

Application Layouts

Header

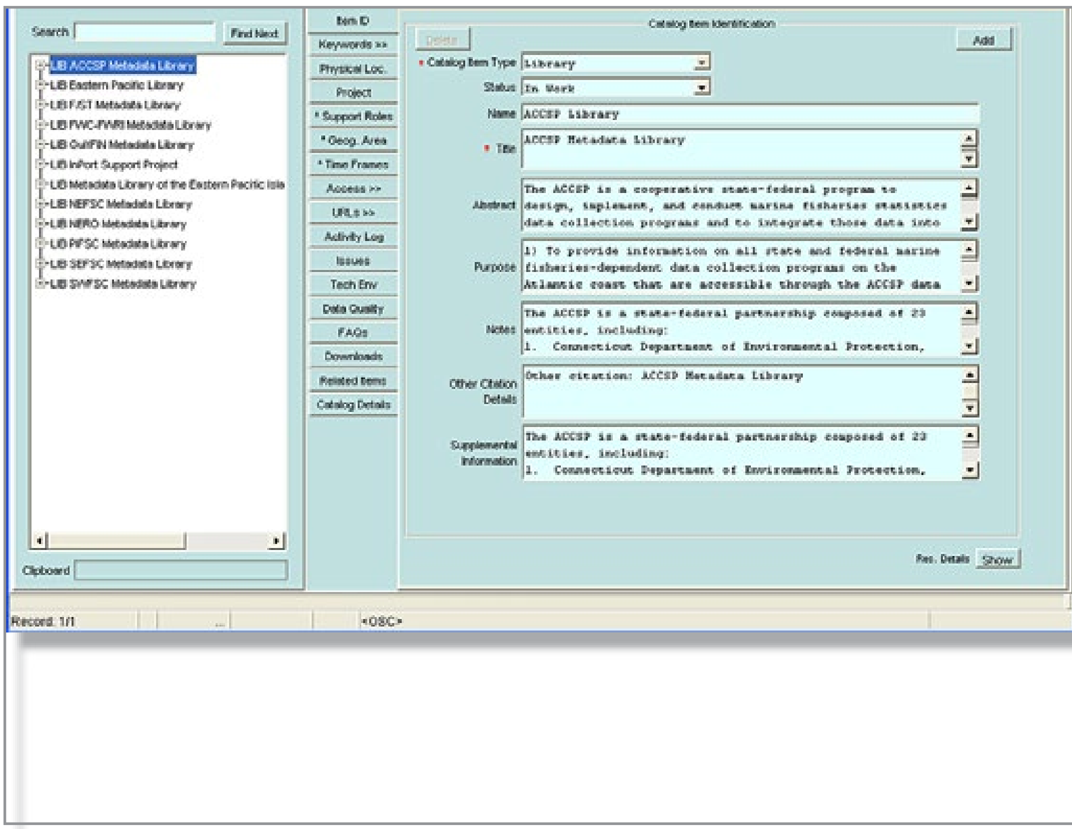
2.8 Application Headers



The right side of the application *Header* pane will show the names and titles of the objects in the Editor pane. Information on the left side of the *Header* pane shows the current application, current user, publishing state of the item, date and time the user logged in to the application and the database and server names.

Editor Pane

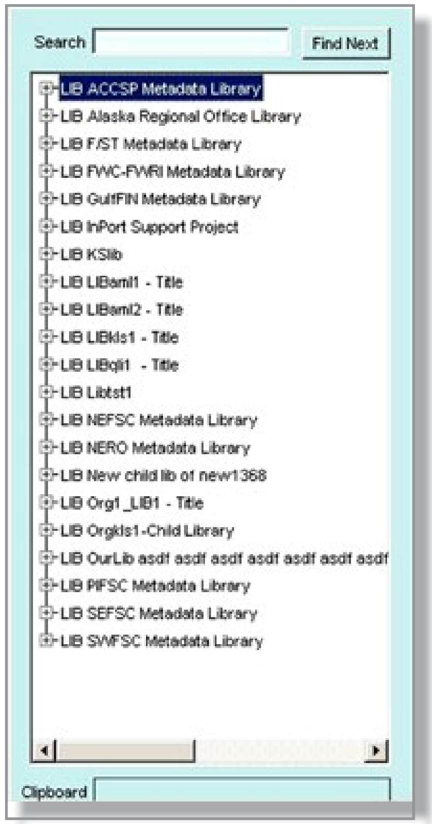
2.9 Example of an InPort Application Editor Pane – Catalog Editor



The application *Editor* pane shows the information for the currently selected object in the Navigator pane. Note that the many tab screens are made available dynamically according to the rules for the specific type of item that is selected in the *Navigator* pane.

Navigator Pane

2.10 Example of an InPort Application Navigator Pane – Catalog Editor



Navigation trees allow users to drill up and down to locate information. The detailed information for the currently selected item is displayed in the Editor Pane. The *Search* text box and the *Find Next* button allows the user to search for the next occurrence of an item that matches the search string text.

Selecting a Tree-Node

Click on the item name in the Navigator pane to select that item. If the item name is not highlighted - then it has not been selected. The information for the highlighted item is displayed in the Editor pane.

Expanding/Collapsing a Tree-Node

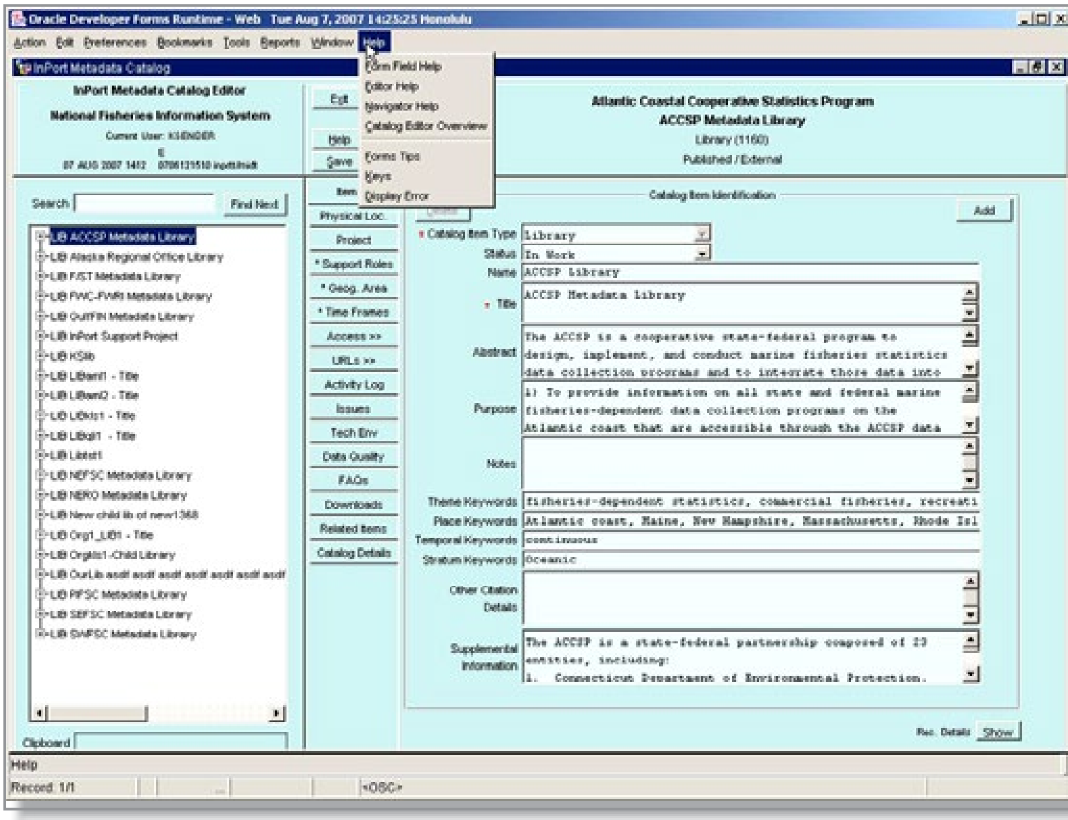
Tree nodes can be expanded to view their child items by either double clicking on the item in the Navigator pane or by clicking on the + before the item's name.

Searching the Tree

Enter a text string in the Search box and click on the Find button in the Navigator pane to find the next item in the tree that matches that search string. The user may continue to click on the Find button to search further down the tree. If no other matches are found, then the search will start back at the top of the tree.

Application Help

2.11 Application Help Functions

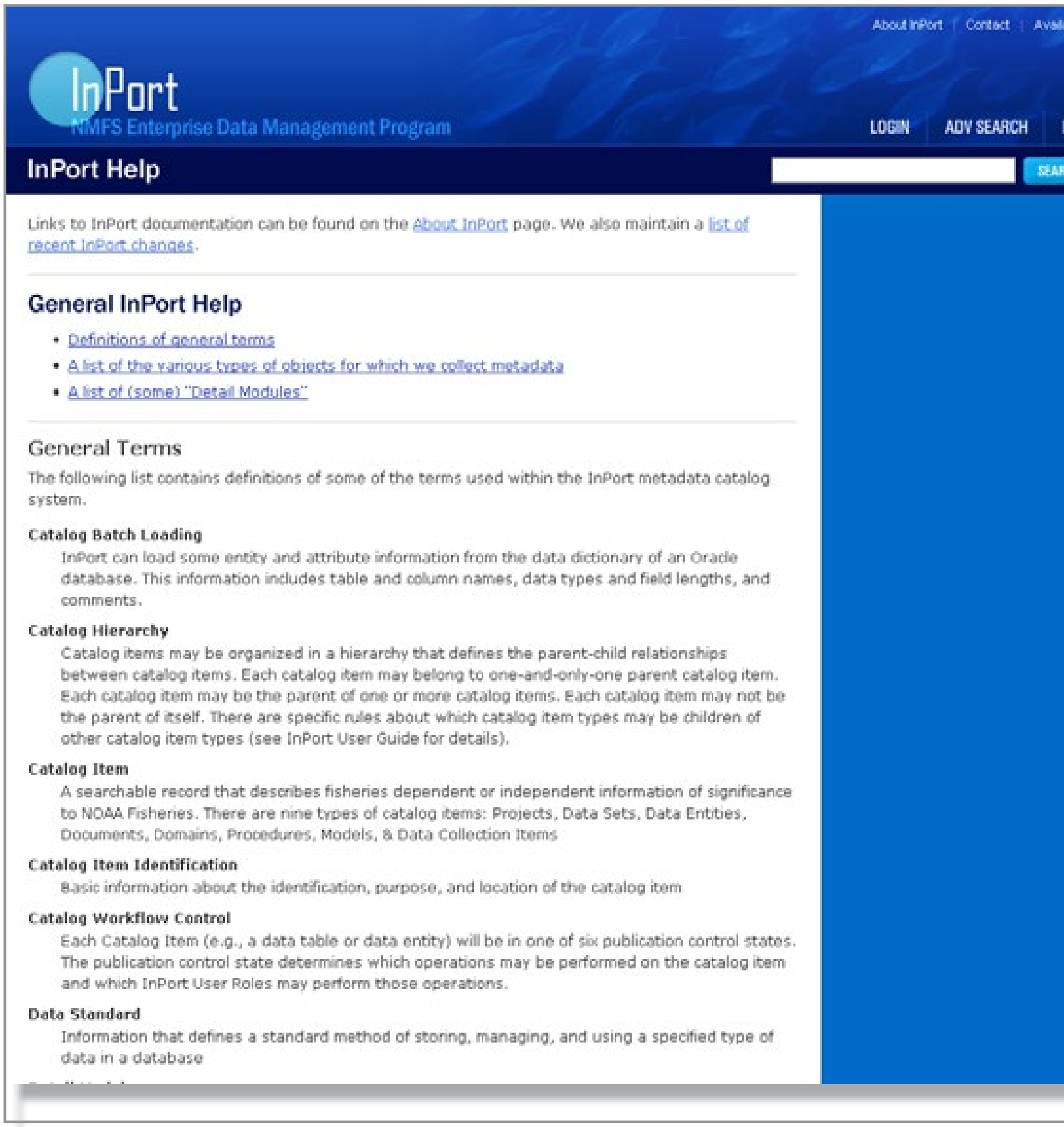


InPort applications provide multiple modes for accessing helpful information about the applications, including screen help, field item help and configurable tool-tips.

Tab Screen Help

Application screen help is accessible via a fly-out menu. Right-click anywhere in the canvas area - outside a field item - and select either **Navigator Help** or **Editor Help**. The **Editor Help** option is context sensitive and returns help information for the currently selected tab in the *Editor* pane.

2.12 Tab Screen Help



About InPort | Contact

InPort

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LOGIN ADV SEARCH

InPort Help

Links to InPort documentation can be found on the About InPort page. We also maintain a list of recent InPort changes.

General InPort Help

- Definitions of general terms
- A list of the various types of objects for which we collect metadata
- A list of (some) "Detail Modules"

General Terms

The following list contains definitions of some of the terms used within the InPort metadata catalog system.

Catalog Batch Loading
InPort can load some entity and attribute information from the data dictionary of an Oracle database. This information includes table and column names, data types and field lengths, and comments.

Catalog Hierarchy
Catalog items may be organized in a hierarchy that defines the parent-child relationships between catalog items. Each catalog item may belong to one-and-only-one parent catalog item. Each catalog item may be the parent of one or more catalog items. Each catalog item may not be the parent of itself. There are specific rules about which catalog item types may be children of other catalog item types (see InPort User Guide for details).

Catalog Item
A searchable record that describes fisheries dependent or independent information of significance to NOAA Fisheries. There are nine types of catalog items: Projects, Data Sets, Data Entities, Documents, Domains, Procedures, Models, & Data Collection Items

Catalog Item Identification
Basic information about the identification, purpose, and location of the catalog item

Catalog Workflow Control
Each Catalog Item (e.g., a data table or data entity) will be in one of six publication control states. The publication control state determines which operations may be performed on the catalog item and which InPort User Roles may perform those operations.

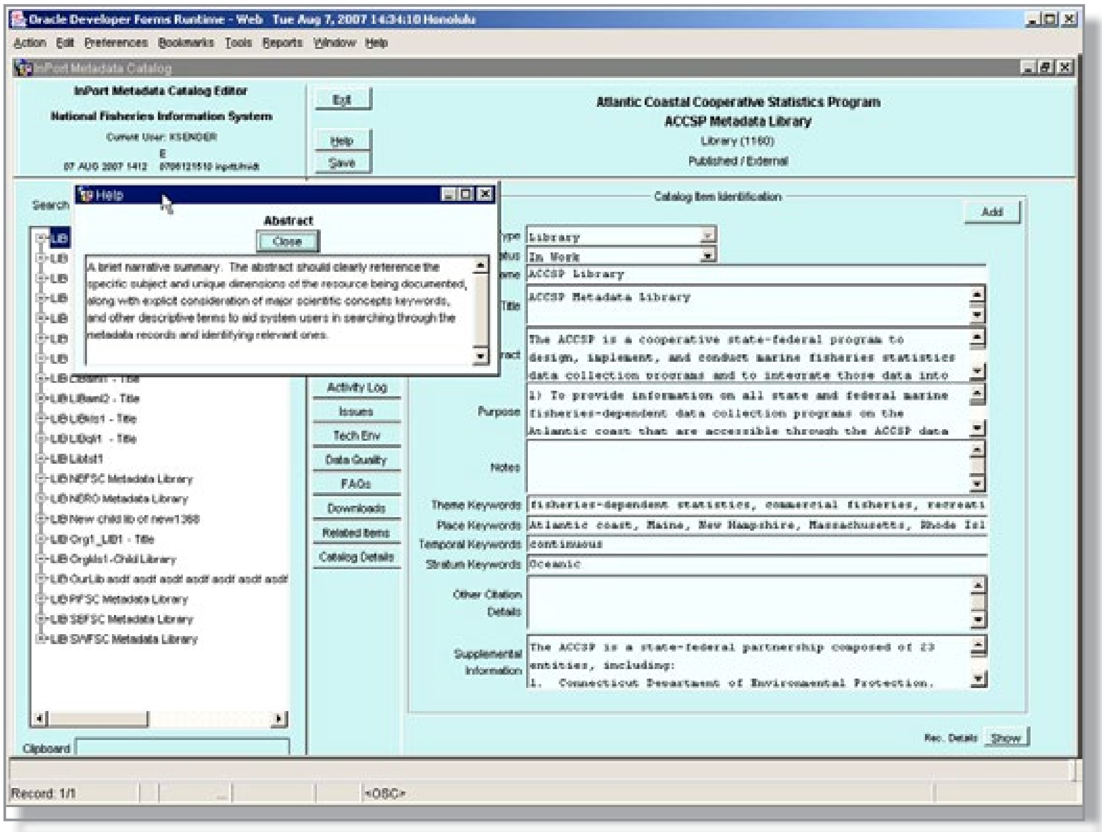
Data Standard
Information that defines a standard method of storing, managing, and using a specified type of data in a database

Selecting the Editor Help menu option will display information about the currently selected tab screen along with details about all the items on that screen.

Field Item Help

Help information for a specific item in the *Editor* pane is available by clicking inside a field item and then clicking on the *Help* button in the *Header* bar, typing CTRL-H, or from the top menu bar Help > Field Item Help. Remember to dismiss the *Help* text box in order to continue by clicking the *Close* button or pressing the Spacebar.

2.13 Field Item Help

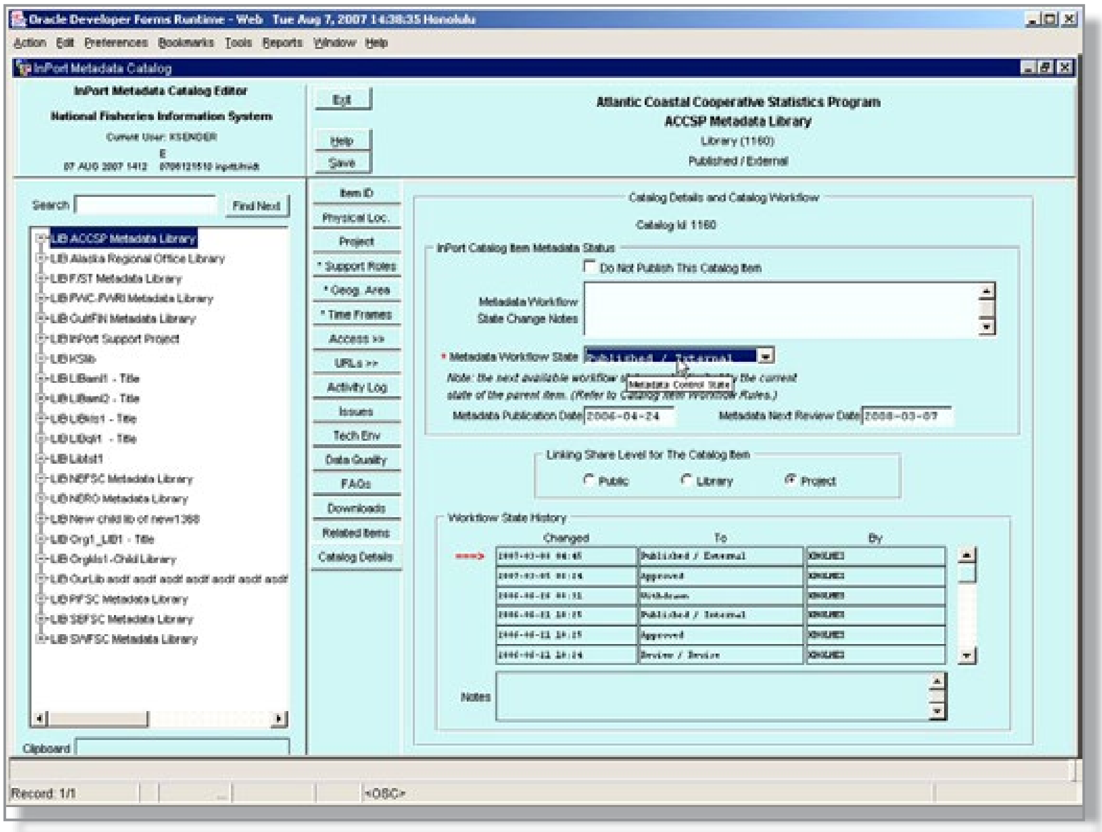


Selecting a field item and then clicking on the Help button or selecting the Item Help option from the Help menu will display information about the selected field item.

Tool Tips

InPort applications start in a mode that enables Tool Tips for fields and buttons. These pop-up labels can show the user a short description or instructions for the field under the cursor. The user may use the Preferences menu above the application header to disable or reduce the number of items that show tool tips.

2.14 Field Item Tool tips



Tool tips can be partially or fully disabled through the Preferences menu.

Application Tips

Menus

Right-click on either the *Navigator* pane or the *Editor* pane to access functions specific to those panes.

List Items

There are two types of list-items fields in InPort applications. A **combo-list** allows the user to either enter their own value or, alternatively, select from a list of values already used for that field. The user will see a I text bar cursor in this type of field.

The second type of list item, a **pop-list**, allows the user to select only from a predetermined list. Clicking in this type of field will show an arrow cursor. Note that pop-lists will attempt to do auto-completion if the user types in the first few letters of a value that is in the list. If users find that a pop-list requires another option, they should email the InPort development team at inport.devteam@mail.nmfs.hawaii.edu

Entering dates and times

Dates and times in InPort are formatted to allow consistency and flexibility to the user. Some fields will allow the user to specify a date/time granualarity, such as Y for year or D for year_day. The format for dates and times in InPort forms is as follows…

YYYY-MM-DD HH:MI (example date: 2004-12-13 00:00)

- YYYY is the 4-digit year
- MM is the numeric month
- DD is the 2-digit day
- HH: is the hour (24-hour clock) followed by a colon
- MI is the minutes (up to 59)
- SSxFF decimal seconds
- TZH: Time zone hour, followed by a colon
- TZM Time zone minutes (usually 00 but sometimes 30)

Appropriate format hints are displayed in the status bar at bottom of the application windows.

Record Details Button

The *Record Details* button (lower-right on most tab screens) will provide the user with the details of who and when the record was created and last modified. It also shows the *Catalog Item ID* number which is useful when linking to other Catalog Items by creating **Related Items**.

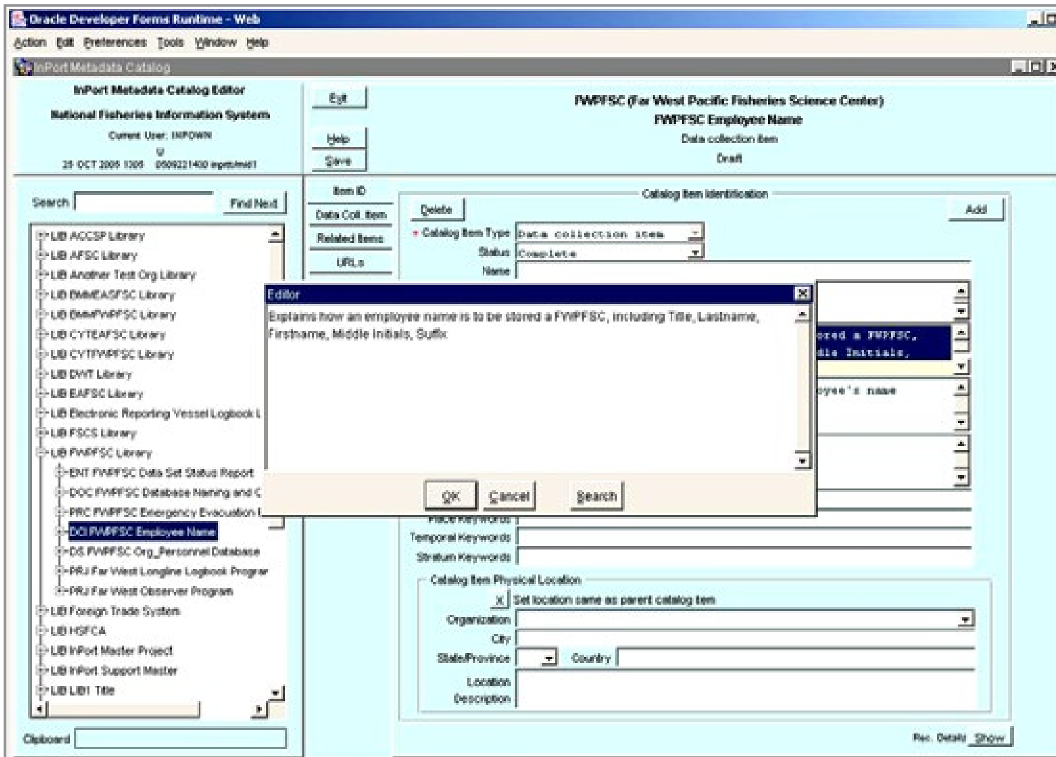
Copying and Pasting From Other Documents

Users may use standard Windows cut-and-paste techniques for text items (Ctrl-C, Ctrl-V). The user may cut text from any Windows document and paste it into a text field, however, it is best to paste text from word processing applications into a plain text document (e.g., Notepad), and then copy-paste from there. This will ensure that hidden formatting characters are not pasted into the catalog field.

Expanding Edit Fields

Text fields are often limited in space. To open a field editor, press Ctrl-E. Click on the *Close* button to exit the editor and return to the application.

2.15 Expanding Field Items for Editing



Many text fields in InPort can contain far more text then there is room for on the screen. Users can open up the text editor by typing Ctrl-E after clicking into the field they want to edit.

Discarding Edits for Individual Fields: Undo

When editing a data field, a user may wish to abort (undo) the change and revert back to the value that was stored in the database (including a NULL value), by selecting the Menu Bar>Edit>Undo. Note that this action will affect only the currently selected field item and will only make an obvious change if the current edits were not yet saved. If additional edits need to be discarded, the user can click in those fields and select Undo. It is important to remember that navigating out of the current tab page will do an automatic *Save* of any changes.

Closing Pop-up Windows

When messages or warnings are displayed with a pop-up window, the user may click on the *Close* button, press the Space Bar, or press the Enter key to dismiss the pop-up window and return to the main application.

3. Catalog Administration

Overview

People and organizations are registered in InPort for two purposes: 1) to manage InPort Libraries by serving as Librarian or Owerner Organization, and/or 2) to serve in Support Roles for individual catalog items, such as Point-of-Contact or Originator.

People and organizations can be registered in InPort by either the InPort Administrator or, within an individual InPort Library, that Library's Metadata Librarian. Only an InPort Administrator can create InPort Libraries and assign Librarians and Data Stewards to a Library.

The Library Manager tool is the main application for catalog administration. Additional functions for creating and managing InPort user accounts are accessible through the **LIBRARY MANAGER**.

InPort Library Setup

How to Create a New InPort Library

1. Each organization will identify a Data Steward and Librarian (and backups, if desired).
2. Complete the InPort Library Request Form (see Appendix D).
3. Complete the InPort Person Registration Form (see Appendix D) for each Data Steward and Librarian.
4. Fax or mail the signed Library Request Form and Person Registration forms to the InPort Administrator.
5. InPort Administrator will set up the new Library and call the Librarian with InPort account information.
6. The new Library will need one or more people for each of the InPort User Roles of Author and Publisher. The Librarian for the new Library may also wish to have other users with Reader role for reviewing - rather than editing - privileges.

InPort User Setup

As mentioned above, the roles of Data Steward and Librarian are created by the InPort Administrator. All other InPort Users (Publishers, Authors, Readers) are registered and created by the local InPort Librarian(s).

How to Set Up InPort Users

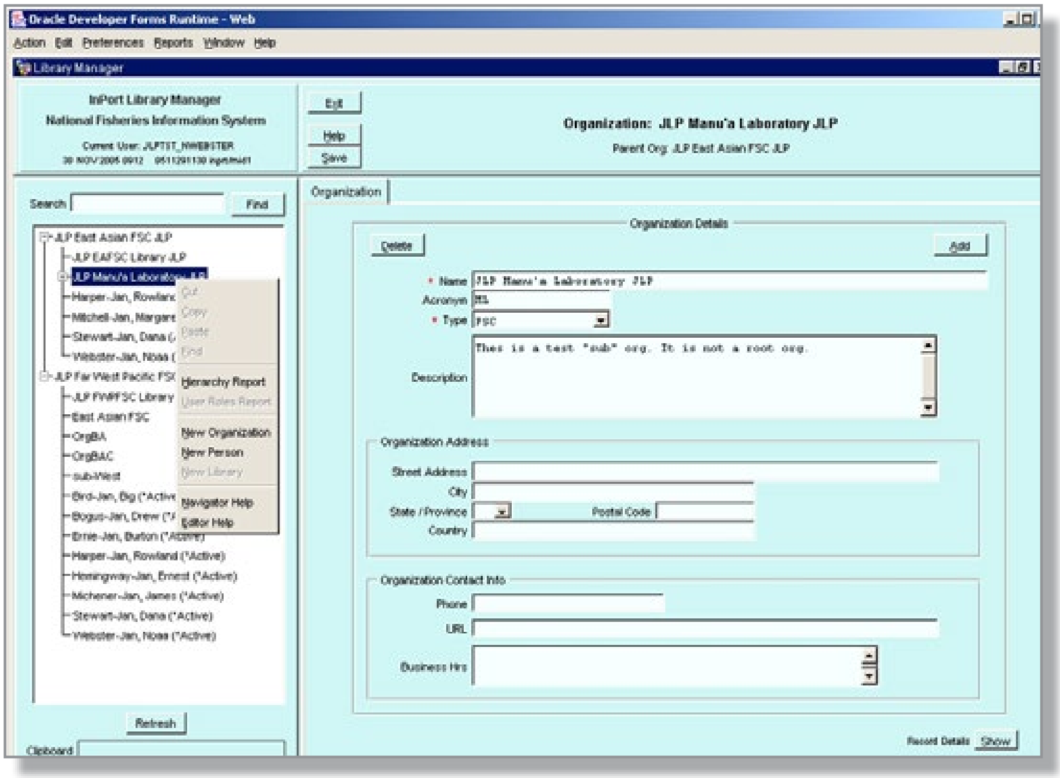
1. If the user does not already exist as an InPort Person, the Metadata Librarian creates a new catalog Person using the Library Manager tool.
2. The InPort Librarian creates a User Role Request for the new person using the User Role Manager tool launched through the Library Manager.
3. The InPort Librarian obtains authorization or rejection from the Organization Data Steward. This is an off-line process at the local organization. The Librarian may use the InPort Person Registration form (see Appendix E).
4. The InPort Librarian completes the InPort User Role Request.
5. The InPort Librarian creates or modifies the InPort user account and the database role per the authorized InPort User Role Request.

Library Management

Library Manager Tool Functions

The **LIBRARY MANAGER** allows InPort Administrators and InPort Librarians to create and manage Organizations, metadata Libraries, and Persons. An InPort Librarian will see the names of all the organizations for which they serve as Librarian, in the left hand *Navigator* pane. Only InPort Administrators can create top (root) level Organizations and Libraries. The InPort Administrator is responsible for creating the Librarian(s) and Data Steward(s) for any organization that requires an InPort Library. Librarians may create and manage sub-Organizations and Persons under their Organizations.

3.1 InPort Library Manager Tool



The Library Manager is used to register organizations, libraries, and people into the InPort system. InPort Library Manager menus are context sensitive and should provide only the functions that are appropriate for the selected tree-node type (i.e., organization, library, or person).

The **LIBRARY MANAGER** also allows InPort administrators and librarians to create and process InPort User Roles for InPort persons who will create, manage, or publish metadata in their assigned metadata library. Librarians can also create and manage a person's InPort account from the **LIBRARY MANAGER**.

LIBRARY MANAGER menus can be accessed by right-clicking inside the *Navigator* pane The menu options are context sensitive and depend both on the user's InPort User Role (Librarian or InPort Administrator) and on the currently selected item in the *Navigator* pane. The *Add Person* option will only be available when an organization is selected. The *Add Library* option will only be available when the user is an InPort Administrator and the selected item is an organization.

The `Cut`, `Copy`, `Paste` options will only be available when a Person is selected. `Cut` with `Paste` is used to move a person from one organization to another and `Copy` with `Paste` is used to assign the person to another organization without moving them from their home organization.

Selecting an organization, library, or person in the *Navigator* pane will cause any information about the organization, library, or person to appear in the *Editor* pane on the right of the screen. Selecting an organization item in the *Navigator* pane will display a single *Organization* tab in the *Editor* pane.

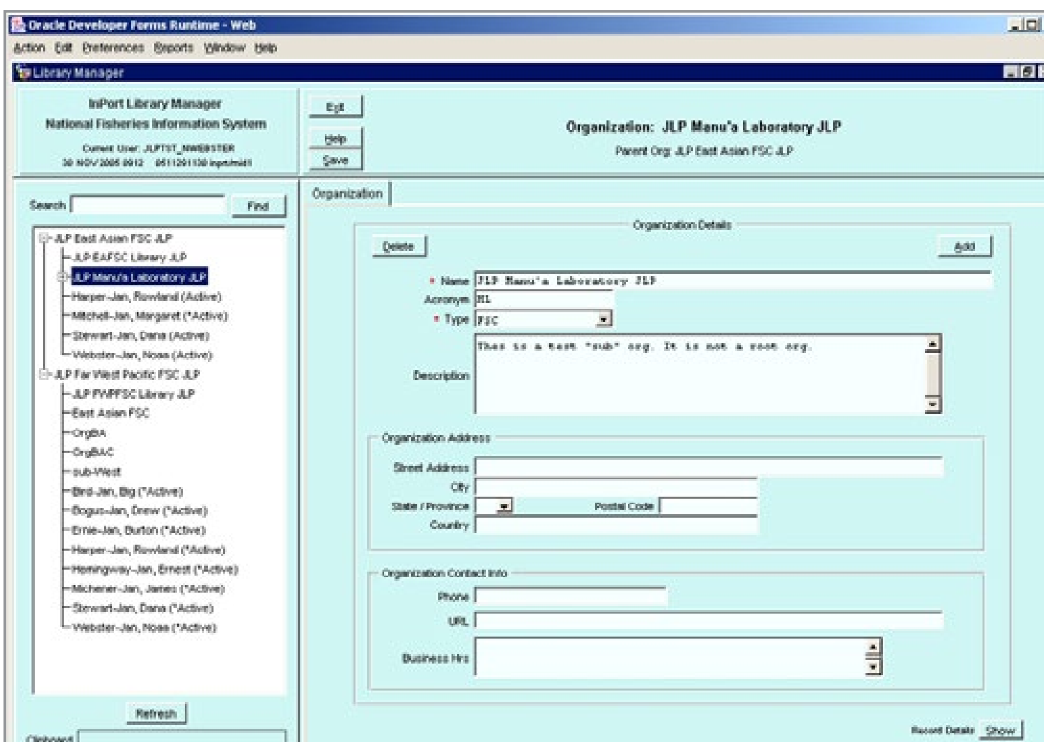
Organization Tab

In the *Navigator* pane, double-click on an Organization name to select and/or expand its tree hierarchy. An Organization may contain one and only one Library, may contain other Organizations (sub-organizations), and may contain an unlimited number of persons. A given person may appear under multiple organizations but will only have one *Home Organization* where their information may be edited. The asterisk by the person's status shows that the person record is listed under their Home Organization.

How to Add an Organization

1. From the **INPORT CATALOG TOOLS** menu, click on the button beside *Library Manager* to display the Library Manager application.
2. Select and highlight the appropriate parent Organization name in the *Navigator* pane.
3. Right-click and select menu option *New Organization*.
4. In the *Editor* pane, fill out the Organization's Details, including name, type, address, and contact information, as is available. Note that only an InPort Administrator may create a new Root (top-level) Organization. Starred items are required fields.
5. Click the *Save* button.

3.2 Library Manager - Organization Tab



Organization (and sub-organizations) can be documented in the Library Manager's Organization Tab.

Screen Item Descriptions

- **Name** - The name of the organization
- **Acronym** - An acronym of the organization

- **Type** - The selected organization type.
- **Root Level Organization?** - Is this a root org, Y/N? Root organizations have no parent. Note that only an InPort Administrator will see this item.
- **Description** - A description of the organization
- **Street Address** - The street address of the organization, including Suite# or P.O. Box
- **City** - The city where the organization is based
- **State Province** - The state or province where the organization is based
- **Postal Code** - The zip or postal code of the organization
- **Country** - The country where the organization is based
- **Contact Phone** - Area code a phone number. Include country code if outside the U.S.
- **URL** - A Universal Resource Locator that can be used to reach the organization via the Internet
- **Business Hours** - Business hours, including expected time away.

People, referred to as Persons in InPort, are organized under InPort organizations. Organizations can have child Organizations to any level. Person records may be created under any Organization level, however, it is probably most practical to create them at the library level. A Person can be moved from their original organization to another organization. However, unless the current user has the Librarian type InPort User Role in both organizations, the move of the person would need to be done by the InPort Administrator (who has access to all libraries).

Library Tab

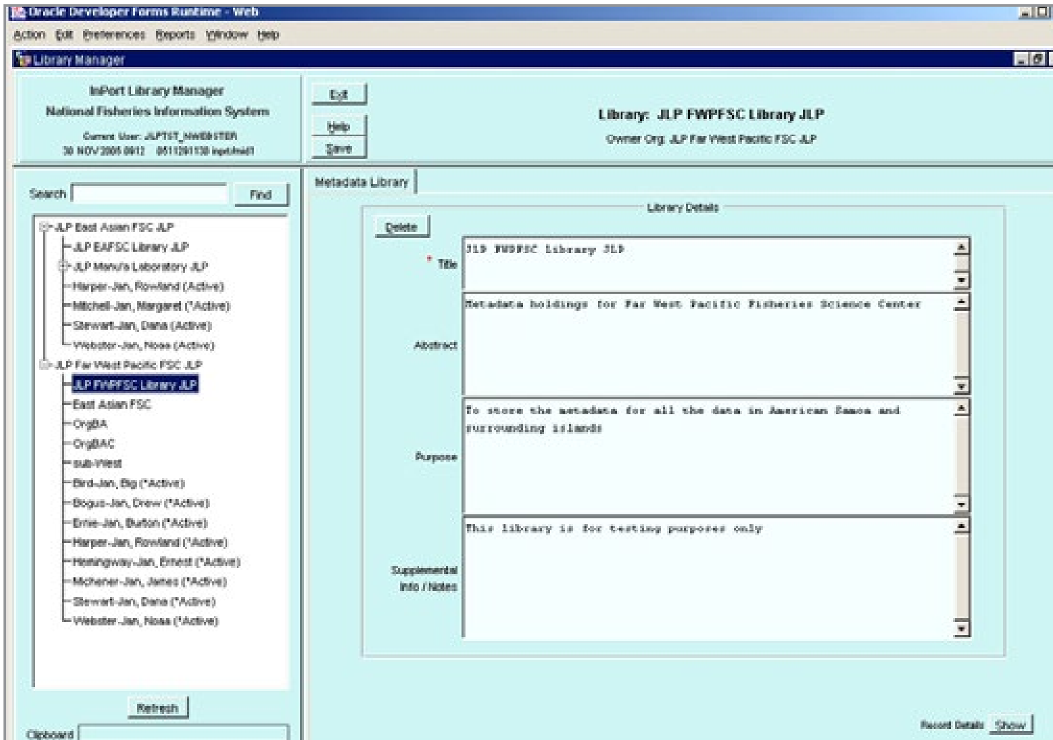
InPort Libraries are created under Organizations. An Organization may contain only one library and only the InPort Administrator may create or edit Libraries.

Selecting a Library item in the *Navigator* pane will display a single *Library* tab in the *Editor* pane. Only a minimum amount of information about a Library is documented in the **LIBRARY MANAGER**, however, more complete information may be detailed through the **INPORT CATALOG EDITOR** at any time.

How to Add a Library

- From the InPort Catalog Tools menu, click on the button beside Library Manager.
- Select and highlight the appropriate Organization name in the Navigator pane.
- Right-click and select menu option New Library.
- In the Editor pane, fill out basic information about the Library. Starred items are required fields.
- Click the Save button.

3.3 Library Manager – Library Tab



An InPort Library created and edited in the Library Manager by the InPort Administrator, but is viewable by the Librarian. A Library may be further documented with the InPort Catalog Editor.

Screen Item Descriptions

- **Title** - Library Title
- **Abstract** - Abstract of the Library
- **Purpose** - Purpose
- **Supplemental Information and Notes** - Supplemental Information and Notes

Person Tab

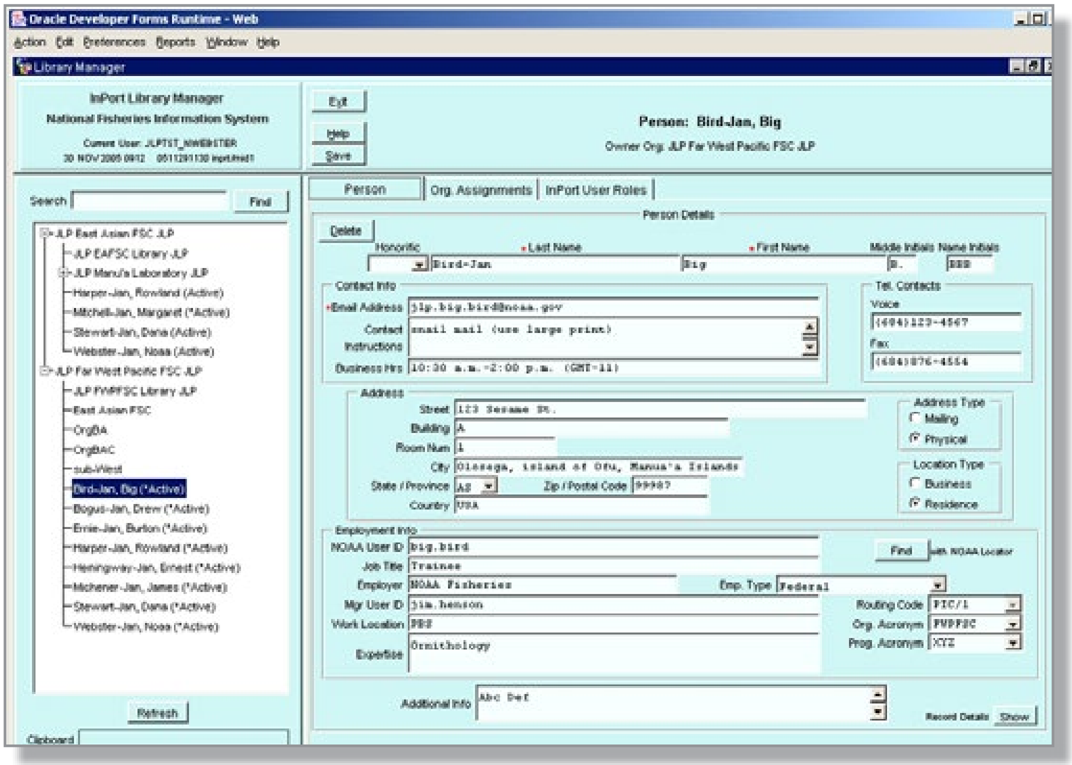
InPort Persons can fulfill two functions within InPort:

1. Serve in an InPort User Role (i.e., Data Steward, Librarian, Publisher, Author, or Reader)
2. Serve in a Support Role to a Catalog Item (e.g., Originator, Point-of-Contact). See the Catalog Editor, Support Roles tab for complete documentation.

In both cases, the person must be registered in InPort before either a User Role or Support Role can be assigned.

Selecting a Person item in the *Navigator* pane will display three tabs in the *Editor* pane: Person, Assignments, InPort User Roles. The top *Person* tab will allow detailed documentation of the person's contact information, employment status, expertise, and work location.

3.4 Library Manager – Person Tab



When a Person is selected in the Navigator pane (or newly created), three tabs will be displayed - Person tab, Org. Assignment tab, and InPort User tab. Details about the persons are documented on the Person tab.

How to Register (Add) a Person

1. From the **INPORT CATALOG TOOLS** menu, click on the button beside *Library Manager*.
2. Select and highlight the appropriate Organization name in the *Navigator* pane.
3. Right-click and select menu option *New Person*.
4. In the *Editor* pane, fill out the Person's information for identification, contact, work location, employment information, and expertise, as is available. Note that the unique identifier for an InPort Person is his/her email address. Starred items are required fields.
5. Click the **SAVE** button.

How to Move a Person to Another Organization

1. From the InPort Catalog Tools menu, click on the button beside Library Manager.
2. Select and highlight the Person's name and home record in the Navigator pane. A person's home record can be recognized by the asterisk before their status, e.g. Dana Steward (*Active). Only a person's home record is edit able.
3. Right-click in the Navigator pane and select menu option Cut. The Person's name will appear the Clipboard area below the Navigator pane.
4. Select and highlight the Organization in the Navigator pane to which the Person will be moved. Make sure the information

for the organization appears in the Editor pane (otherwise the organization was not successfully selected).

5. Right-click in the Navigator pane and select menu option Paste. The Person's name should appear under the selected organization. The Person should no longer appear under their previous home organization.
6. Click the Save button.

Screen Item Descriptions

- **Honorific** - Title of respect (Mr., Ms., Mrs., Rev.., Dr., The Honorable, etc.)
- **Last Name** - Last name of the person
- **First Name** - First name of the person
- **Middle Initials** - Middle initials of the person
- **Initials** - Initials of the person
- **Email Address** - Contact email address
- **Contact Instructions** - Contact instructions
- **Business Hours** - Business hours
- **Voice Phone Number** - Contact voice phone
- **FAX Number** - Contact fax phone
- **Street Address** - The street number and name, including apartment number
- **Building Name/ID** - The building in which the person works
- **Room Number** - The room number in which the person works
- **City** - The city in which the person lives or works
- **State Province** - The state in which the person lives or works
- **Postal Code** - The zip code for the person's residence or business
- **Country** - The country in which the person lives or works
- **Address Type** - "MAILING ADDRESS" or "PHYSICAL ADDRESS"
- **Address Type** - Is this a residence or business address. Valid entries are: Residence, Business
- **NOAA User ID** - Firstname.Middlename.Lastname
- **Job Title** - The person's job title
- **Employer** - The source of a person's salary. Valid entries include (but ar not limited to): FED, JIMAR
- **Employee Type** - Federal, Commissioned, Contractor, Function, Associate
- **Manager's User ID** - Manager's user ID of the form Firstname.Middlename.Lastname.
- **Work Location** - The primary business location for this person
- Expertise - Field or fields in which the person has specialized training or experience
- **Routing Code** - Employee routing code
- **Organization Acronym** - The acronym of the organization or agency that this person represents
- **Additional Information** - Supplemental information about this person

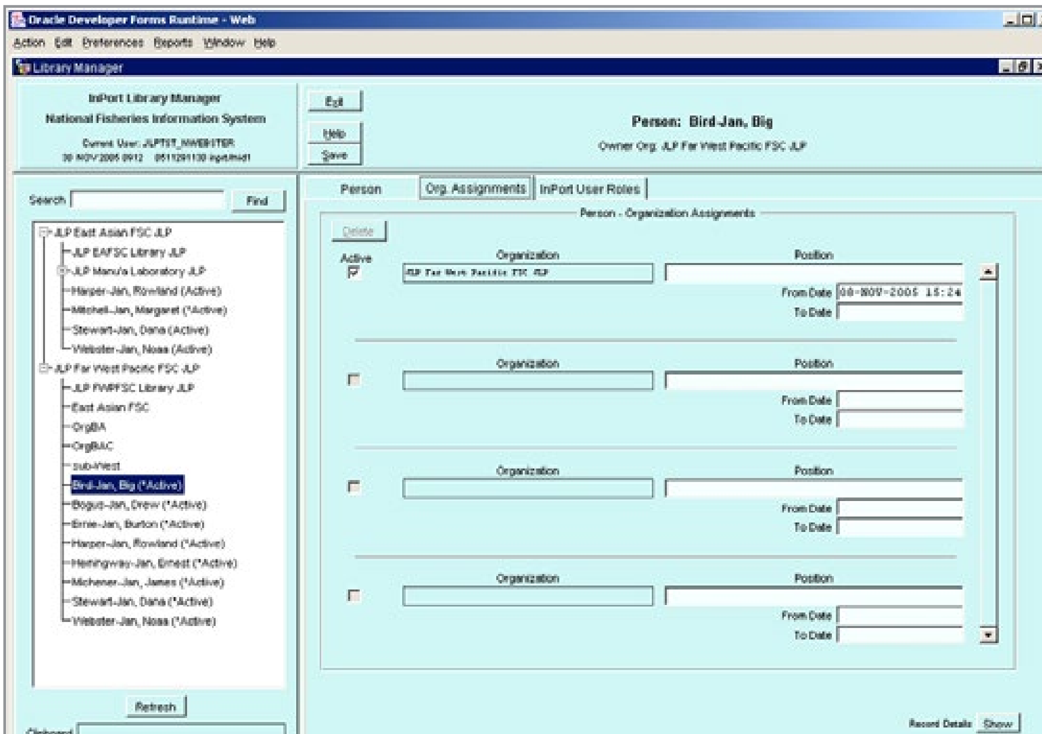
Organization Assignment Tab

Clicking on the *Assignments* tab for a Person will allow the user to manage the Person's organization assignments.

An Organization Assignment controls the Libraries in which the Person may be granted InPort User roles.

An assignment record is automatically created when a person record is created under an organization. If the person is working in multiple organizations, the person can be assigned to the other organization(s), thus creating those assignment records. Assignment records can be edited, activated, and deactivated. Assignment records can only be deleted if they are not referenced anywhere else in the Library and must be deleted before the Person can be deleted from the InPort Catalog.

3.5 Library Manager – Org. Assignment Tab



The Library Manager's Org. Assignment tab shows in which organizations the Person works.

How to Assign a Person to Additional Organizations

- From the InPort Catalog Tools menu, click on the button beside Library Manager.
- Select and highlight the Person's name and home record in the Navigator pane. A person's home record can be recognized by the asterisk before their status, e.g. Dana Stewart (*Active). *Only a person's home record is editable.*
- Right-click in the Navigator pane and select menu option Copy. The Person's name will appear the Clipboard area below the Navigator pane.
- Select and highlight the Organization in the Navigator pane to which the Person will have a new assignment. Make sure the information for the organization appears in the Editor pane (otherwise the organization was not successfully selected).
- Right-click in the Navigator pane and select menu option Paste. The Org. Assignments tab should now be displayed in the Editor pane

and the Person's name should appear under the selected organization.

- In the Editor pane, fill out the Person's position title and appropriate begin and end dates for the assignment if required.
- Click the Save button.

Screen Item Descriptions

- **Active?** - Record status -- A(ctive), I(nactive)
- **Organization** - Organization Name (automatically filled in by the Add Organization Assignment process
- **Position** - The position held by the person (e.g., debriefer, analyst)
- **From Date** - First day of assignment to the org
- **To Date** - Last day of assignment to the org

InPort User Roles Tab

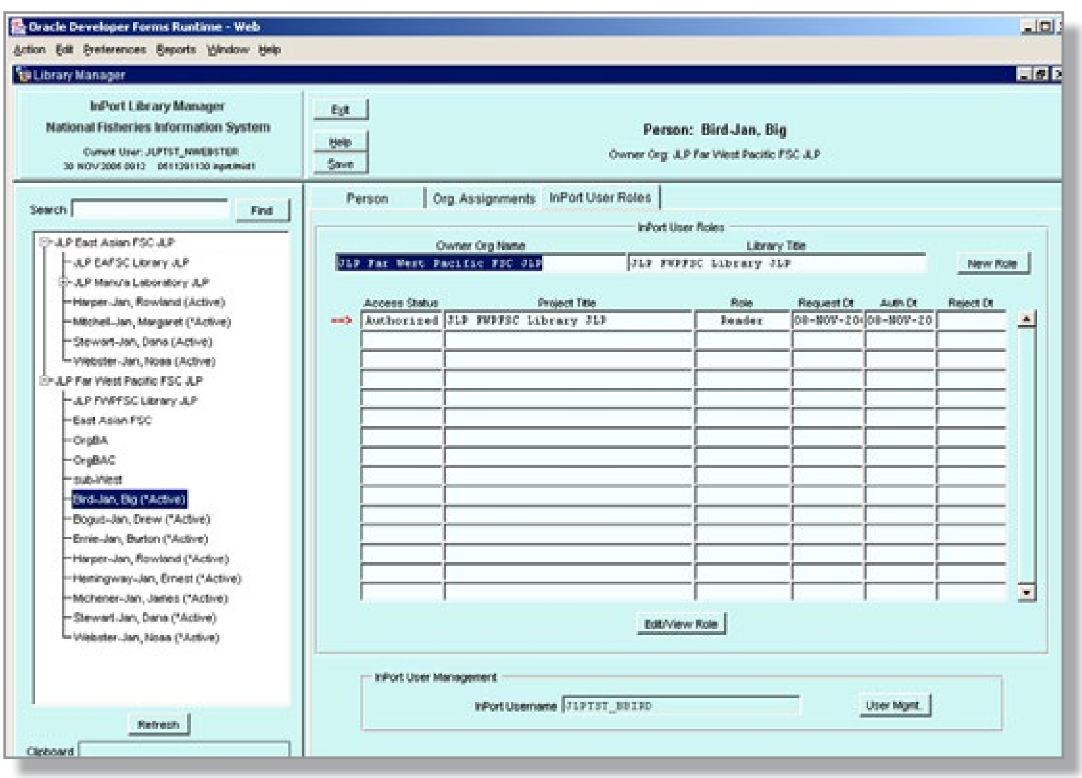
Clicking the *InPort User Roles* tab for a Person will display any processed or pending InPort User Role requests.

The *New Role* button on this tab will open up the **INPORT USER ROLE MANAGER** tool in order to request a new InPort User Role.

Selecting an existing InPort User Role record in the table will enable the *Edit/View Role* button, which can then be used navigate to that specific InPort User Role record in the **INPORT USER ROLE MANAGER**.

The *User Mgmt.* button allows the user to create and manage the Person's InPort user account, including changing their password.

3.6 Library Manager -InPort User Tab



Use the Library Manager's InPort User Roles tab to view the Person's InPort User roles. The Librarian may also use the buttons to open the InPort User Role Manager and User Manager tools for managing roles and InPort user accounts. Note that no fields on this tab are entered or edited by the user.

Screen Item Descriptions

- **Owner Organization Name** - Owner Organization Name
- **Library Title** - Library Title
- **InPort User Role Status** - InPort User Role Status [Active, Inactive]
- **Library/Project Title** - Library/Project Title
- **InPort User Role** - InPort User Role [Author, Reader, etc.]
- **InPort User Role Request Date** - The date that this role was requested
- **InPort User Role Authorization Date** - Date that this role was authorized
- **InPort Username** - InPort account username

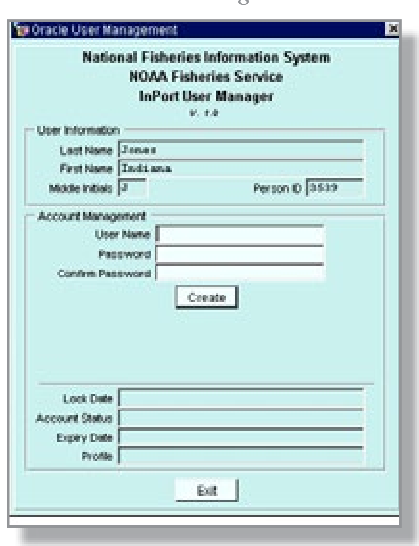
InPort User Account Management

The **INPORT USER MANAGER** is used to create and manage InPort user accounts. This tool can be opened either from the **LIBRARY MANAGER** or the **INPORT USER ROLE MANAGER**. It is important to note that only those people - registered in InPort as Persons - that will actually be managing metadata in InPort will require InPort user accounts.

How to Create a New InPort User Account

1. From either the Library Manager or **INPORT USER ROLE MANAGER**, click on the *User Mgmt.* button.
2. Enter the user's password in both the Password field and the Password Confirmation fields.
3. Click the Create button.
4. If the requested username already exists, then follow the prompts to see if the existing user is also an InPort user or possibly the same user your are trying to create. If necessary, choose another username and try again.
5. Click the Exit button to return to the original tool.

3.7 InPort User Manager - New User

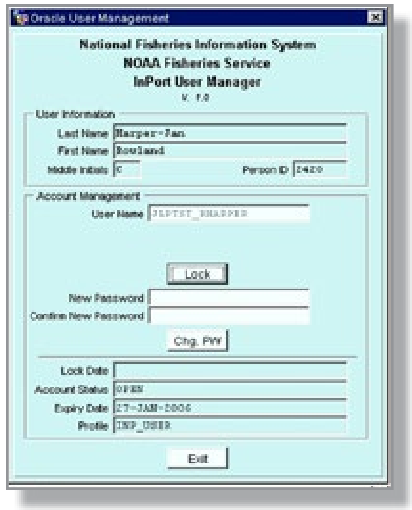


The InPort User Manager tool is used to create and manage InPort user accounts.

How to Change an InPort User's Password

1. From either the **LIBRARY MANAGER** or **INPORT USER ROLE** Manager, select the desired Person record, click on the InPort User Roles tab, and then click on the User Mgmt. button.
2. Enter the user's new password in both the **New Password** field and the **New Password Confirmation** fields.
3. Click the *Change Password* button.
4. Click the *Exit* button to return to the original tool.

3.8 InPort User Manager – Existing User



The InPort User Manager can also be used to change passwords or lock/unlock the user's account.

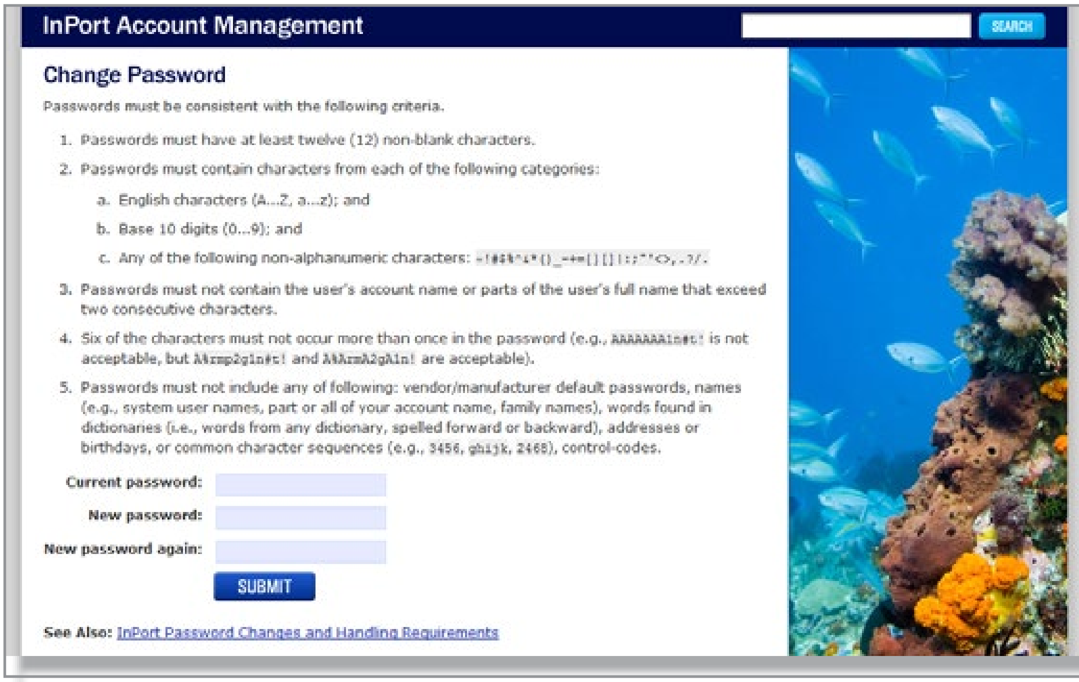
How to Lock or Unlock an InPort User Account

1. From either the **LIBRARY MANAGER** or **INPORT USER ROLE MANAGER**, select the desired Person record, click on the In-Port User Roles tab, and then click on the *User Mgmt.* button.
2. If the user's account is open then the *Lock* Button will be displayed. If the user's account is locked, then the *Unlock* button will be displayed.
3. Click the appropriate button.
4. Click the *Exit* button to return to the original tool.

InPort User Account Password Management

User account passwords in InPort follow NOAA rules and users will thus be required to change their passwords on a regular basis. Users can manage their own passwords by first logging into the InPort web site and then clicking on the **account** link on the upper right corner of the Publication page.

3.9 InPort Account Management Page

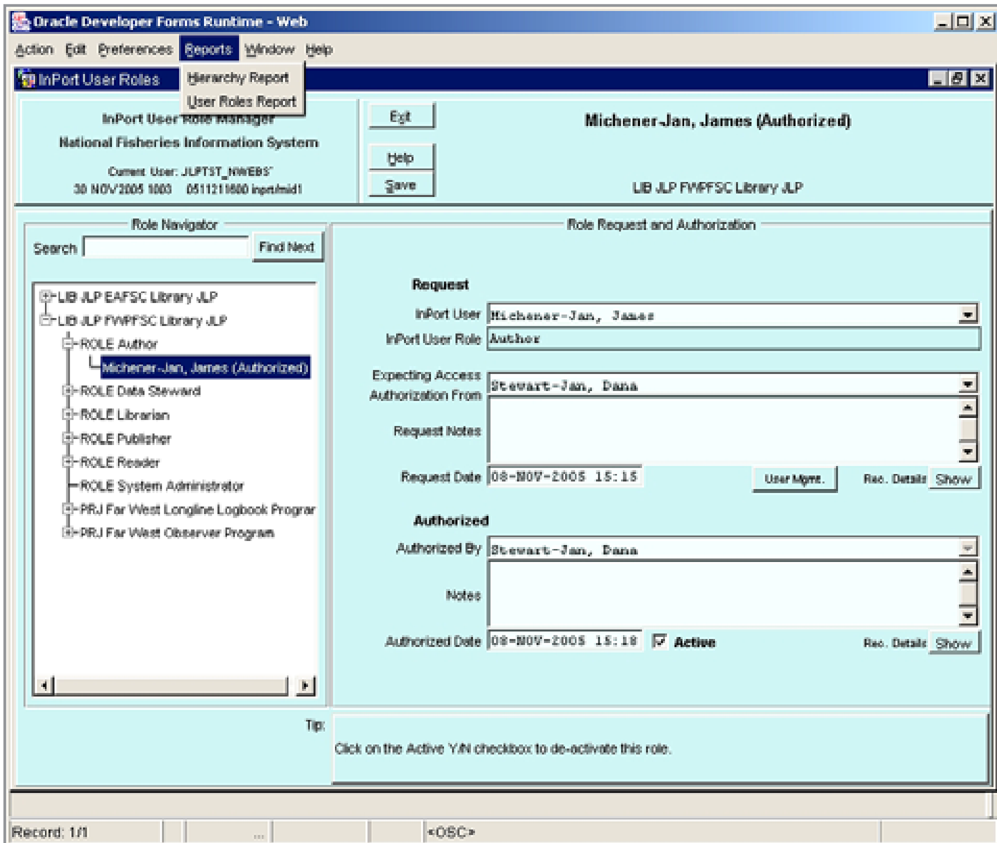


InPort users can change their login password from the InPort Account Management page which is available after logging in to the web site. InPort Librarians can also manage their user's InPort accounts using the Library Manager tool.

InPort User Role Manager

The **INPORT USER ROLE MANAGER** allows InPort Administrators and Librarians to grant specific InPort User Roles (Reader, Author, Publisher, Librarian, Data Steward), to InPort Persons for specific metadata Libraries and Projects. If the Librarian wishes to grant access to specific Catalog Projects rather than the entire Library, then the Librarian must first create the Project(s) in the **INPORT CATALOG EDITOR.**

3.10 InPort User Role Manager



This screen shows an authorized, active InPort User role. The screen displays in this application are context sensitive and depends both upon the type of item selected in the Navigator pane and the status of that item.

The granting of an InPort User Role is a two step process. A Request is generated for a specific Person, for a specific Role, in a specific Library or Project. At that time, the Librarian or InPort Administrator will specify which Data Steward or InPort Administrator is expected to Authorize (or possibly Reject), the User Role Request. After the Request is saved, it will be marked as Pending. Only a Pending request may be deleted. Librarians are expected to maintain their normal in-house process or documentation for user computer and data access and while it is the Librarian who executes the final authorization or rejection of an Role Request, the Librarian will specify the Data Steward that actually signed off on the Request.

Note that helpful information will be displayed at the bottom of the screen in the *Tip* area below the *Editor* pane. The currently displayed *Tip Text* will depend on what action the user has just performed and should provide the user with what their next action should be.

The **INPORT USER ROLE MANAGER** can only be opened from the **LIBRARY MANAGER** tool from either the *New Role* button or the *Edit/View Role* button.

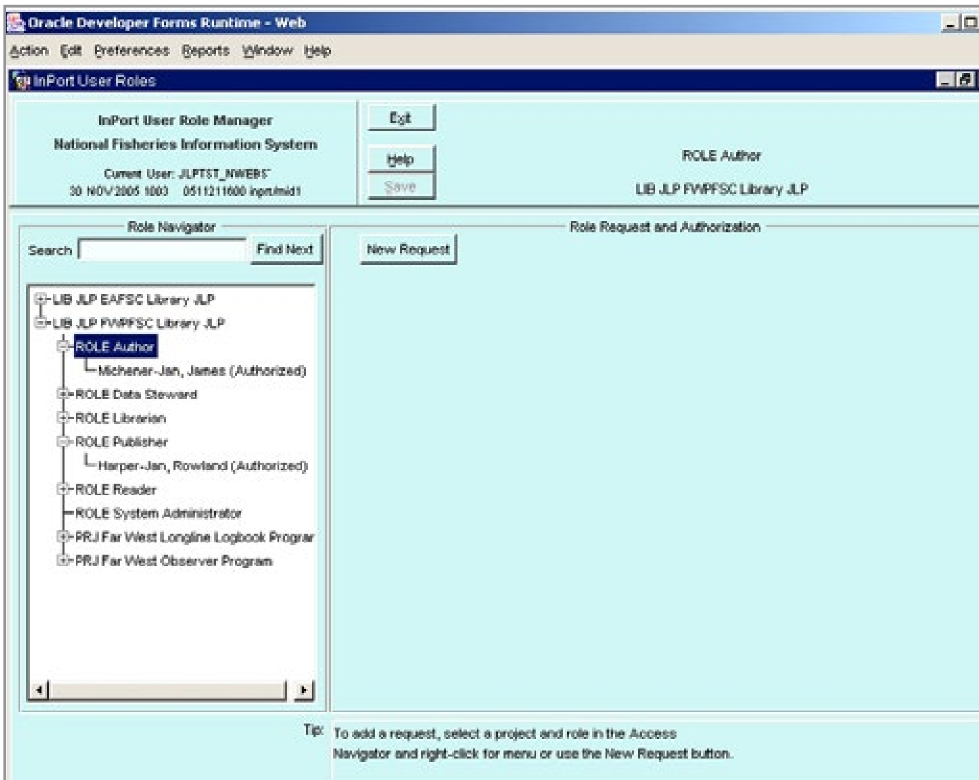
From the **LIBRARY MANAGER**, with a Person's *InPort User Roles* tab displayed, clicking on the *New Role* button will open the **INPORT USER ROLE MANAGER**. The *Navigator* pane will be positioned at the Library of the Organization that was last selected in the **LIBRARY MANAGER** from which the user just came. If that Organization does not yet have a Library, the *Navigator Tree* will be positioned at the first available Library.

Note that clicking the *Exit* button will close the **INPORT USER ROLE MANAGER** and re-open the **LIBRARY MANAGER**. Any new role information for the selected person will be reflected on the displayed *InPort User Role* tab.

With the selected Library expanded in the *Navigator* pane, all the possible InPort user roles will be visible. A Plus sign (+), to the left of the Role name will indicate that at least one Person has a pending or completed role of that type.

Creating InPort User Role Requests

3.11 User Role Manager – New Role Request



Locate the Library or Project and select the role which the user needs. Right click to select the New Request option or click the New Request button in the Editor Pane. Follow the instructions in the Tip Area at the bottom of the Editor Pane.

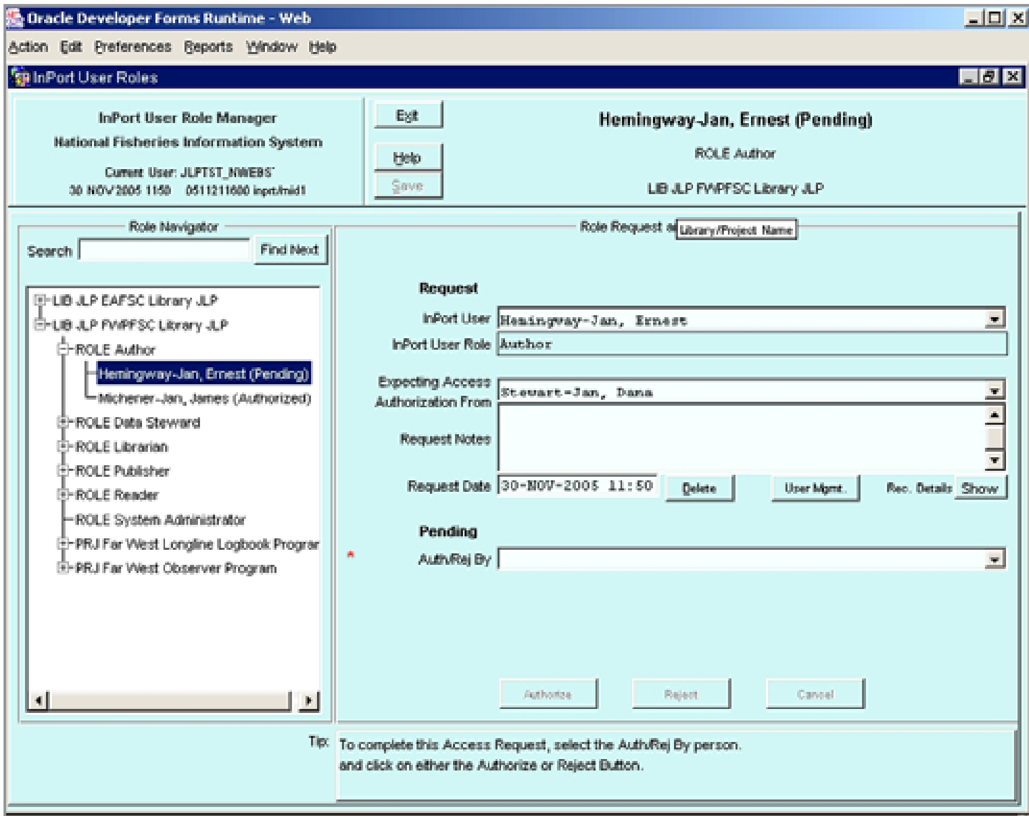
How to Create an InPort User Role Request

1. To create a new InPort User Role request, in the **INPORT USER ROLE MANAGER,** select the appropriate role under the Library or Project that needs that role. The user may either click the *New Request* button or right-click to select the *New Request* menu option.
2. Clicking on the *New Request* button disables (grays out), the *Navigator* pane and displays the New Request fields in the *Editor* pane
3. The *Catalog Role* field and request date will already be filled out. Per the *Tip Text*, select an *InPort User* and the *Expected Authorizer* from their pop-lists. You may choose to write notes in the *Request Notes* field.
4. Click the *Save* button to complete the request and re-enable

the *Navigator* pane.

Authorizing or Rejecting an InPort User Role Request

3.12 InPort User Role Manager – Pending Request



A completed request appears as a Pending request in the Navigator Pane. This request may still be deleted at this point, if needed.

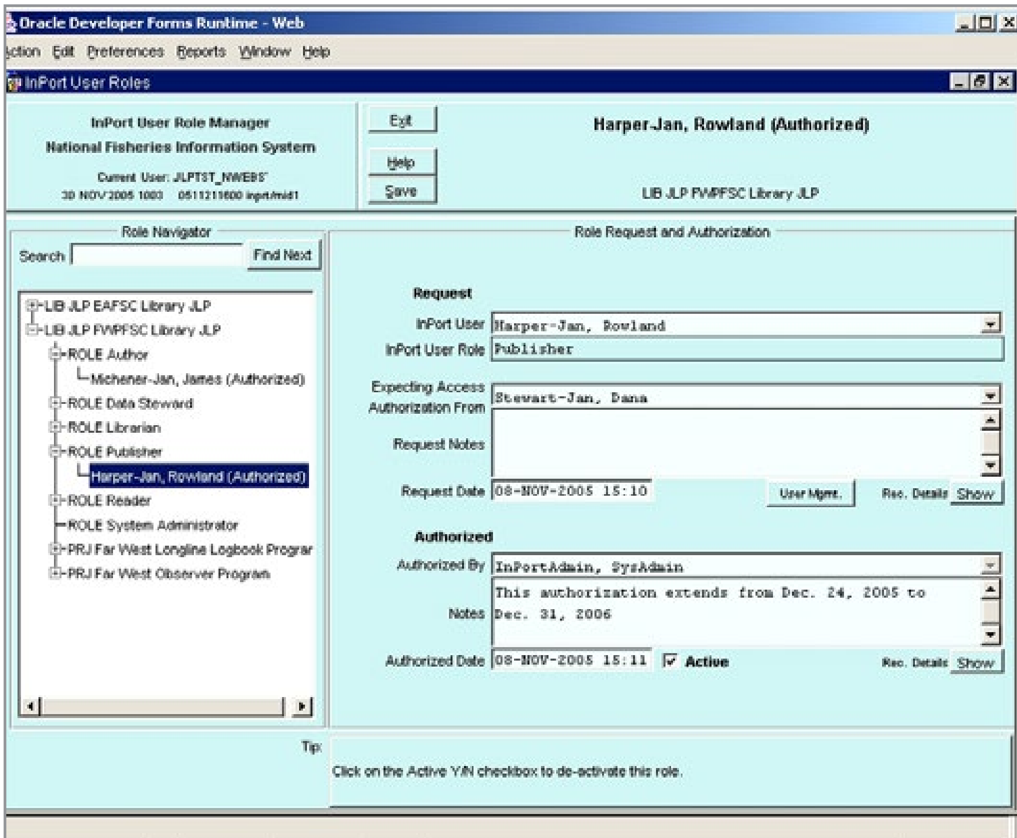
How to Complete a Pending User Role Request

1. Frequently, there will be a lag time between requesting and authorizing (or rejecting) a User Role. For that reason, the Librarian and InPort Administrator may navigate directly to a person's Pending User Role request in the **INPORT USER ROLE MANAGER** by selecting the role request record in the **LIBRARY MANAGER**, *InPort User Role* tab for the Person in question, and then clicking on the *Edit/View Role* button.
2. When the **INPORT USER ROLE MANAGER** opens, the *Navigator* pane will have the Persons role request record selected.
3. Select the appropriate Data Steward or InPort Administrator from the *Auth/Rej By* field. This will lock the *Navigator* pane.
4. Click on the *Authorize* or *Reject* button to complete the role request, or click on *Cancel* to abort the process and leave it as a Pending request.
5. Click the *Save* button after completing the request to complete the process and re-enable the *Navigator* pane.

Note that InPort User Role authorization will require that the Person being granted the role must first have an active InPort user account. The Librarian may use the User Mgmt. button to create, unlock/lock the account or change the user's password. This *function is also accessible directly from the* **LIBRARY MANAGER**, *InPort User Roles tab.*

De-activating or Re-activating an Authorized Role

3.13 InPort User Role Manager – Inactive Role



An authorized user role may be subsequently deactivated or reactivated by toggling the *Active* check box.

How to Deactivate or Reactivate an InPort User Role

1. Using the **INPORT USER ROLES MANAGER,** authorized requests may not be deleted, but they may be deactivated, or reactivated by toggling the *Active* check box.
2. Click the *Save* button to complete that action.

User Roles Report

A list of the InPort Persons that are granted user roles for a given Library, Project, or Catalog Item is available from both the Library Manager and Catalog Editor. This report will display in the user's browser and can then be printed.

How to Generate a User Roles Report

1. From either the **LIBRARY MANAGER** or **CATALOG EDITOR**, select a Library or Catalog Item in the *Navigator* pane.
2. Right-click in the *Navigator* pane and select menu option `Show User Roles`.

3. The report will display in the user's default browser. If desired, use the browser's print function to print the report.

3.14 InPort User Roles Report

InPort
NMFS Enterprise Data Management Program

InPort User Roles Report

PIFSC Fishery-Dependent Metadata Portfolio

Abstract This portfolio contains the metadata of fishery-dependent data collected by the Pacific Islands Fisheries Science Center (PIFSC).

InPort User Roles

Granted on PIFSC Metadata Library:

Access Role	Name	Email Address	Username	Access Granted
Publisher	Wetherall, Jerry	jerry.wetherall@noaa.gov	JWETHERALL	2006-01-23
Author	Allen, Stewart	stewart.allen@noaa.gov	SALLEN	2007-06-11
Author	Pappas, Janet	janet.pappas@noaa.gov	JPAPPAS	2007-03-28
Author	Pappastst, Janet	janet.pappastst@noaa.gov	TST_JLP	2006-02-24
Author	Sender, Karen	karen.sender@noaa.gov	KSENDER	2007-03-28
Author	Test, Jan	jan.test@mytest.tst	JTEST	2006-02-24
Reader	Pappas, Janet	janet.pappas@noaa.gov	JPAPPAS	2007-03-28
Data Steward	Wetherall, Jerry	jerry.wetherall@noaa.gov	JWETHERALL	2005-12-30
Librarian	Dane, Joseph	joseph.dane@noaa.gov	JDANE_LIB	2008-09-12
Librarian	Miyamoto, Brent	brent.miyamoto@noaa.gov	BMIYAMOTO	2005-12-30

Granted on PIFSC Fishery-Dependent Metadata Portfolio:

Access Role	Name	Email Address	Username	Access Granted
Author	Parry, Matthew	matthew.parry@noaa.gov	MPARRY	2006-06-28

Send comments and feedback to inport@noaa.gov.

Printed on 2011-04-27 10:04 AM by INPOWN

This InPort User Roles Report can be generated from either the Library Manager or Catalog Editor.

4. Catalog Maintenance

InPort Catalog Organization

Catalog items are organized in a parent-child hierarchy with the top of the hierarchy being the organization's InPort Library. The collection of InPort Libraries make up the InPort Catalog. When an InPort user logs into the InPort Catalog Editor, they will see all the Libraries for which they have an active InPort User Role (Reader, Author, Publisher, etc.).

Catalog item types include...

- Metadata Library(*)
- Project
- Data Set
- Data Entity
- Document
- Procedure

(*) The Metadata Library is a special Catalog Item that represents all the currently cataloged data collection activities of an Organization.

Catalog items are organized in a hierarchy according to the following rules:

- Each catalog item may belong to one-and-only-one parent catalog item
- Each catalog item may be the parent of one or more catalog items
- Each catalog item may not be the parent of itself

InPort Catalog Editor

The **INPORT CATALOG EDITOR** tool is used for:

- Creating Catalog (metadata) Items in a Library Hierarchy
- Reviewing, revising, and approving information in the catalog
- Moving Catalog Items within a Library Hierarchy
- Publishing Catalog Items to internal users or the public

The Catalog Editor is the main tool for entering, editing, and publishing an organization's metadata within their InPort Library. Librarians will be able to organize their metadata into Projects. Under a Project, different types of metadata may be stored, including documents, data sets, tables, reports, images, procedures, as well as sub-projects or any *Set* of similar items. The method of organizing an InPort Library is ultimately the responsibility (and privilege!) of each InPort Librarian.

The Catalog Editor is arranged in pages or *Tabs*. Each tab allows the user to enter a different type of information. All Catalog Items will have display the

Item ID tab where the item's Name, Title, Abstract, Purpose, Keywords, and Location will be entered. Based on the Catalog Item Type (e.g., Document, Data Set, Project), additional *Detail* tab pages will be displayed. For example, all item types will have a tab page for Time Frame (start/end) information, Geographic Area coverage, Support/Contact Roles, and Access/Security information. Additionally, Projects will have tab pages for Acronym descriptions, glossary terms and FAQs. In short the Catalog Editor should supply the user with appropriate tabs for storing all the diverse types of metadata collected by the user's organization.

How to Create New Catalog Items

1. From the **INPORT CATALOG TOOLS** menu, click on the button beside *Catalog Editor*.
2. Select and highlight the appropriate Catalog Item or Library in the *Navigator* pane, under which you want to create the new item
3. Right-click and select menu option *New Item* or click the *Add* button in the *Editor* pane.
4. In the Catalog Item Type pop-list, select a Catalog Item Type
5. Complete the desired fields on the Item ID tab and the additional tab that is named for the chosen item type (e.g., Project, Data Set).
6. The user may choose to further describe the item using any of the Detail Modules (e.g., Time Frame, Support Roles), available for the chosen item type.

How to Move a Catalog Item to a Different Parent Item

1. In the Catalog Navigator pane, select the item to be moved. Important: the item is selected ONLY if you see its details in the Editor pane on the right.
2. Right click on the selected item and choose menu option Cut. The name of the selected item will appear below the Navigator pane in the box labeled Clipboard.
3. Select the new Parent Item under which you want to place the item you cut to the Clipboard. Again, ensure that you can see this parent item in the Editor pane.
4. Right click on the new Parent Item and choose menu option Paste.
5. If the move to the new Parent Item will produce a valid parent-child relationship, the user will be asked to confirm or Cancel the operation.
6. When the user confirms the operation, the Catalog Item that was placed in the Clipboard will move to the new location.

How to Delete All Childless Children of a Catalog Item

Note that the deleting of Catalog Items is only possible if the item has no child items and the item is in the either Draft or Review/Revise workflow state. Normally, deletion of a Catalog Item is performed by clicking on the *Delete* button on the item's Item ID tab. However, it is possible to delete all child items under certain conditions (parent and all child item workflow states are all Draft or Review/Revise AND the child items have no children. This ability is particularly useful should a user batch load many tables under a data set catalog item and wish to delete them all without deleting the parent data set.

1. In the Catalog Navigator pane, select the parent of the items to be deleted. Important: the item is selected ONLY if you see its details in the Editor pane on the right.
2. From the top menu bar choose Tools>Delete Child Records.
3. Confirm your action to delete all childless children of the currently selected item. Notes that there is no Undo for this action. Deletion is permanent. Child items that had child items themselves will not be deleted.

Find Next

Use the Search box and Find Next button to locate a catalog item where the search string is found in the Title of an item. Repeat clicking the Find Next if needed.

Find Last Edited

Select Menu option Bookmarks>Last Item Edited to jump to the last catalog item the current user had created or modified.

Catalog Reports

Users can access useful reports from the Main Menu -> Reports option.

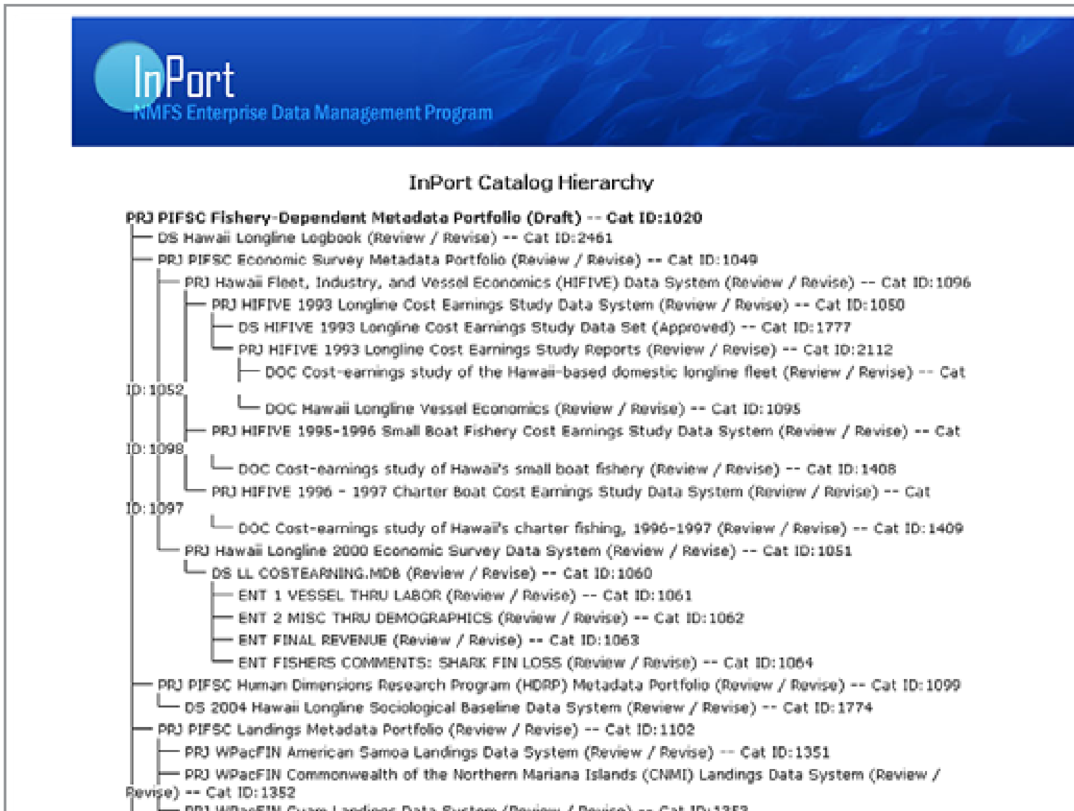
- Catalog Item Report for the current item
- Fillable Catalog Item Form for current item
- Fillable Catalog Item Forms for each catalog item type
- Catalog Item History Report for the current item
- Catalog Hierarchy Report for the current item and all descendents
- User History Report for the currently logged in user
- User Roles Report for the currently selected item

These reports will be displayed in a browser window which can then be printed or saved. The Catalog Item Report and blank fillable item forms are very useful for offline interviews of the various support persons that will have documentation and metadata.

Catalog Hierarchy Report

The user may produce and print a report showing all of the catalog items that descend from the currently selected catalog item. This report will show Title, Workflow State, and relationships of all catalog items as an hierarchical map.

4.1 Catalog Editor – Catalog Hierarchy Report



The user may generate and print a Catalog Hierarchy Report to obtain a graphical representation of all the descendents of a selected Catalog Item.

How to Generate a Catalog Hierarchy Report

1. From the **CATALOG EDITOR**, select a Library or Catalog Item in the *Navigator* pane.
2. From the top menu bar select Reports>Hierarchy Report
3. Use the browser print function to print the report. May also use the browser search or find function

User Roles Report

A list of the InPort Persons that are granted user roles for a given Library, Project, or Catalog Item is available from both the Library Manager and Catalog Editor. This report will display in the user's browser and can then be printed the the browser print function or icon.

4.2 Catalog Editor – Roles Report

InPort
NMFS Enterprise Data Management Program

InPort User Roles Report

PIFSC Fishery-Dependent Metadata Portfolio

Abstract This portfolio contains the metadata of fishery-dependent data collected by the Pacific Islands Fisheries Science Center (PIFSC).

InPort User Roles

Granted on PIFSC Metadata Library:

Access Role	Name	Email Address	Username	Access Granted
Publisher	Wetherall, Jerry	jerry.wetherall@noaa.gov	JWETHERALL	2006-01-23
Author	Allen, Stewart	stewart.allen@noaa.gov	SALLEN	2007-06-11
Author	Pappas, Janet	janet.pappas@noaa.gov	JPAPPAS	2007-03-28
Author	Pappastst, Janet	janet.pappastst@noaa.gov	TST_JLP	2006-02-24
Author	Sender, Karen	karen.sender@noaa.gov	KSENDER	2007-03-28
Author	Test, Jan	jan.test@mytest.tst	JTEST	2006-02-24
Reader	Pappas, Janet	janet.pappas@noaa.gov	JPAPPAS	2007-03-28
Data Steward	Wetherall, Jerry	jerry.wetherall@noaa.gov	JWETHERALL	2005-12-30
Librarian	Dane, Joseph	joseph.dane@noaa.gov	JDANE_LIB	2008-09-12
Librarian	Miyamoto, Brent	brent.miyamoto@noaa.gov	BMIYAMOTO	2005-12-30

Granted on PIFSC Fishery-Dependent Metadata Portfolio:

Access Role	Name	Email Address	Username	Access Granted
Author	Parry, Matthew	matthew.parry@noaa.gov	MPARRY	2006-06-28

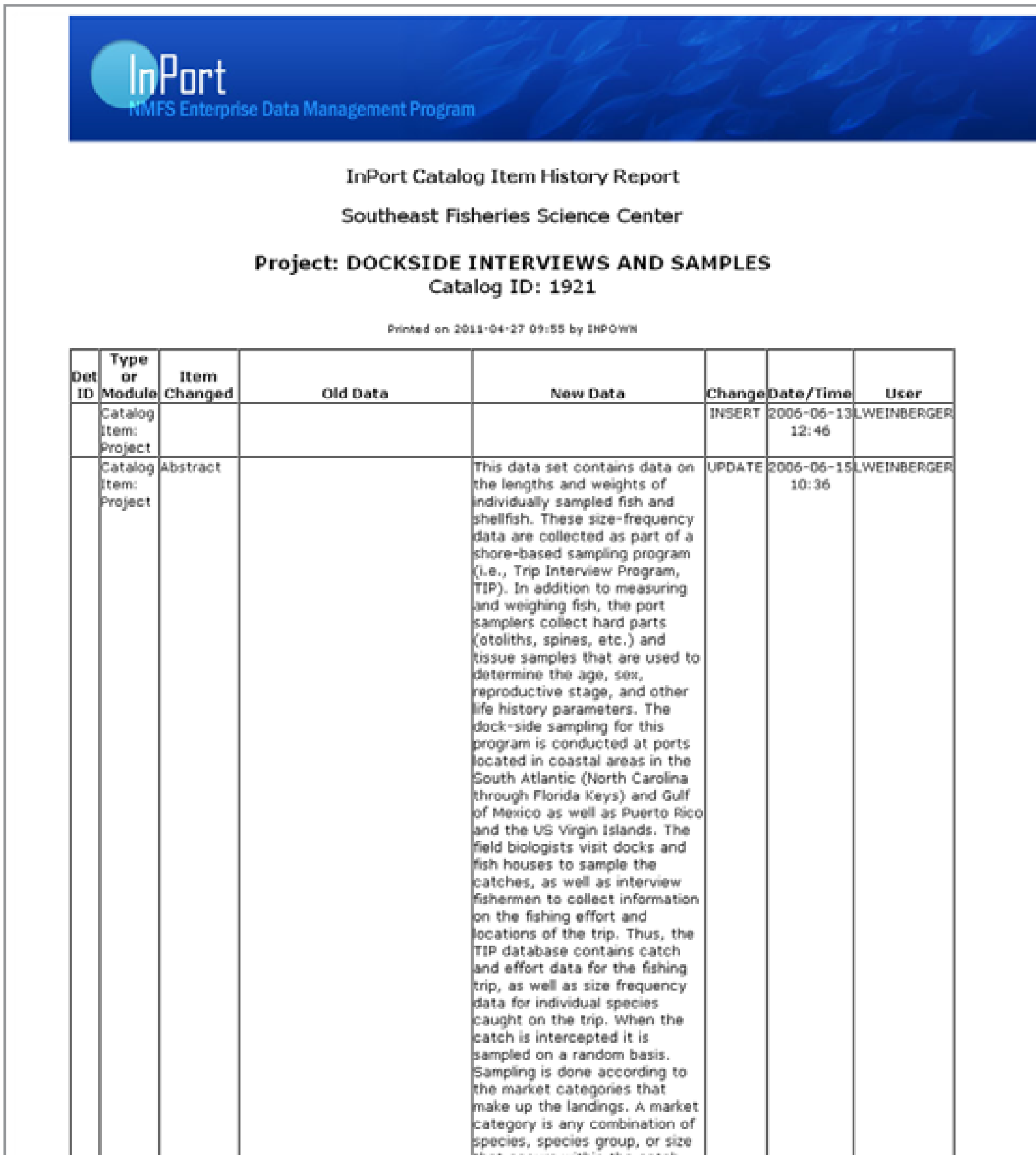
The user may generate and print a User Roles Report to obtain a list of the people granted roles for reading, creating, editing, and/or publishing the selected catalog item

How to Generate a User Roles Report

1. From either the **CATALOG EDITOR**, select a Library or Catalog Item in the *Navigator* pane.
2. From the top menu bar select Reports>User Roles Report
3. Use the browser print function to print the report

Catalog Item History Report

4.3 Catalog Editor – Catalog Item History Report



InPort
NMFS Enterprise Data Management Program

InPort Catalog Item History Report

Southeast Fisheries Science Center

Project: DOCKSIDE INTERVIEWS AND SAMPLES
Catalog ID: 1921

Printed on 2011-04-27 09:55 by INPOWN

Det ID	Type or Module	Item Changed	Old Data	New Data	Change	Date/Time	User
	Catalog Item: Project				INSERT	2006-06-13 12:46	LWEINBERGER
	Catalog Item: Project	Abstract		This data set contains data on the lengths and weights of individually sampled fish and shellfish. These size-frequency data are collected as part of a shore-based sampling program (i.e., Trip Interview Program, TIP). In addition to measuring and weighing fish, the port samplers collect hard parts (otoliths, spines, etc.) and tissue samples that are used to determine the age, sex, reproductive stage, and other life history parameters. The dock-side sampling for this program is conducted at ports located in coastal areas in the South Atlantic (North Carolina through Florida Keys) and Gulf of Mexico as well as Puerto Rico and the US Virgin Islands. The field biologists visit docks and fish houses to sample the catches, as well as interview fishermen to collect information on the fishing effort and locations of the trip. Thus, the TIP database contains catch and effort data for the fishing trip, as well as size frequency data for individual species caught on the trip. When the catch is intercepted it is sampled on a random basis. Sampling is done according to the market categories that make up the landings. A market category is any combination of species, species group, or size that occurs within the catch	UPDATE	2006-06-15 10:36	LWEINBERGER

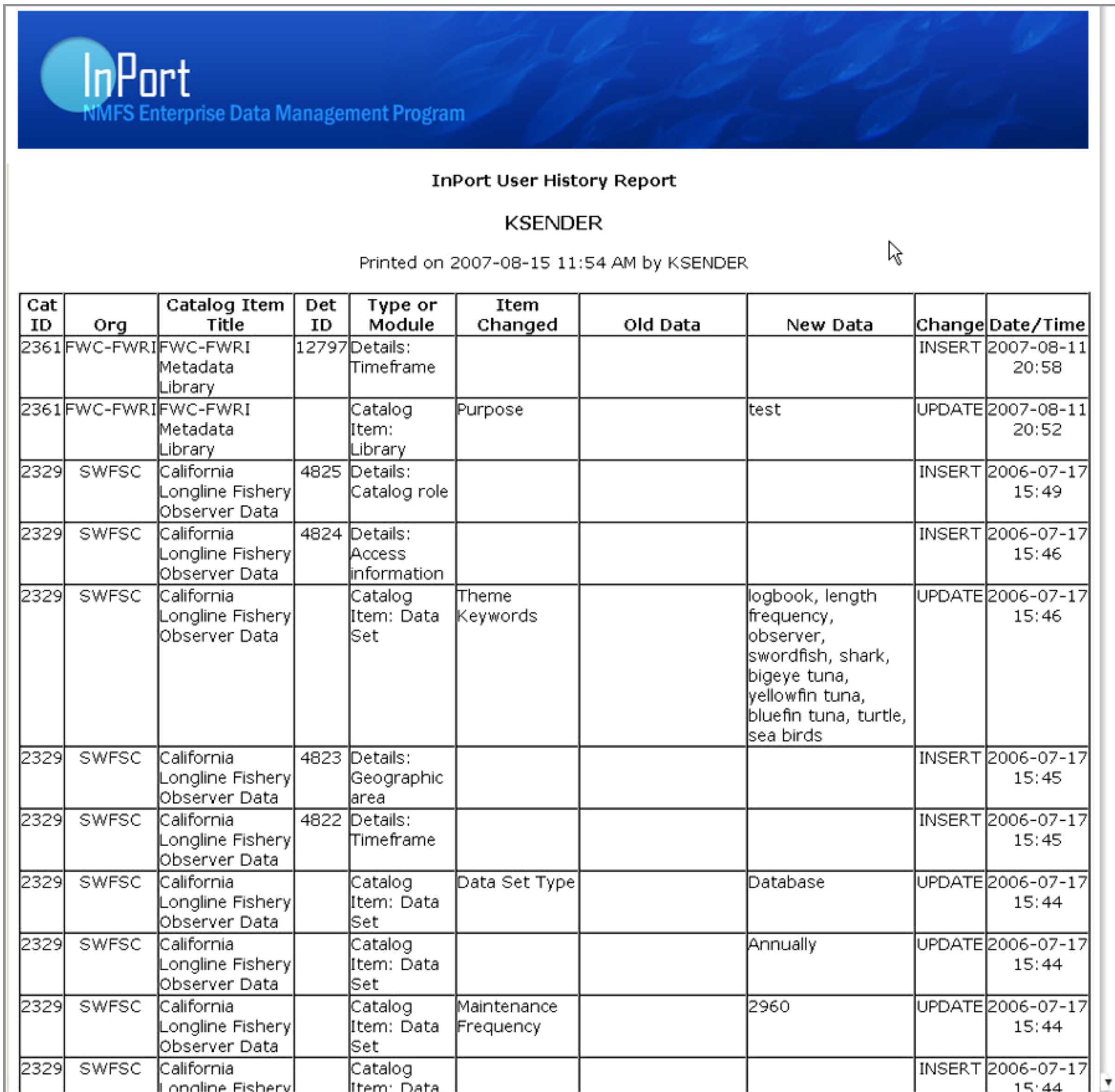
The Catalog Item History Report will show the full edit history of a catalog item.

How to Generate a Catalog Item History Report

1. From the **CATALOG EDITOR**, select a Library or Catalog Item in the *Navigator* pane.
2. From the top menu bar select Reports>Catalog Item History Report
3. Use the browser print function to print the report. May also use the browser search or find function

User History Report

4.4 User History Report



InPort User History Report

KSENDER

Printed on 2007-08-15 11:54 AM by KSENDER

Cat ID	Org	Catalog Item Title	Det ID	Type or Module	Item Changed	Old Data	New Data	Change	Date/Time
2361	FWC-FWRI	FWC-FWRI Metadata Library	12797	Details: Timeframe				INSERT	2007-08-11 20:58
2361	FWC-FWRI	FWC-FWRI Metadata Library		Catalog Item: Library	Purpose		test	UPDATE	2007-08-11 20:52
2329	SWFSC	California Longline Fishery Observer Data	4825	Details: Catalog role				INSERT	2006-07-17 15:49
2329	SWFSC	California Longline Fishery Observer Data	4824	Details: Access information				INSERT	2006-07-17 15:46
2329	SWFSC	California Longline Fishery Observer Data		Catalog Item: Data Set	Theme Keywords		logbook, length frequency, observer, swordfish, shark, bigeye tuna, yellowfin tuna, bluefin tuna, turtle, sea birds	UPDATE	2006-07-17 15:46
2329	SWFSC	California Longline Fishery Observer Data	4823	Details: Geographic area				INSERT	2006-07-17 15:45
2329	SWFSC	California Longline Fishery Observer Data	4822	Details: Timeframe				INSERT	2006-07-17 15:45
2329	SWFSC	California Longline Fishery Observer Data		Catalog Item: Data Set	Data Set Type		Database	UPDATE	2006-07-17 15:44
2329	SWFSC	California Longline Fishery Observer Data		Catalog Item: Data Set			Annually	UPDATE	2006-07-17 15:44
2329	SWFSC	California Longline Fishery Observer Data		Catalog Item: Data Set	Maintenance Frequency		2960	UPDATE	2006-07-17 15:44
2329	SWFSC	California Longline Fishery		Catalog Item: Data				INSERT	2006-07-17 15:44

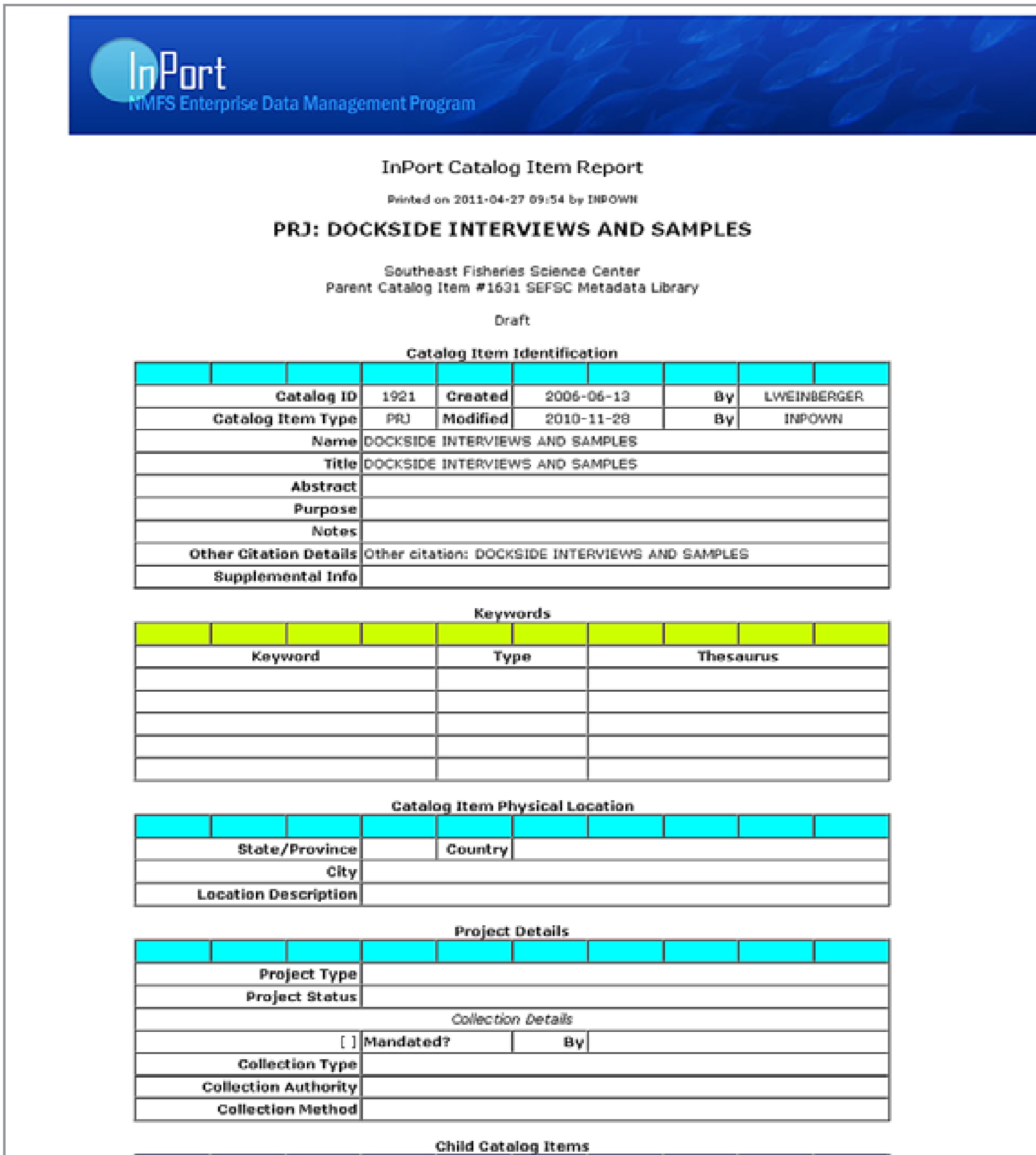
The User History Report will display all the transactions the current user has made, regardless of which catalog item is selected.

How to Generate a User History Report

1. From the **CATALOG EDITOR**, select a Library or Catalog Item in the *Navigator* pane.
2. From the top menu bar select Reports>User History Report
3. Use the browser print function to print the report. May also use the browser search or find function

Selected Catalog Item Fillable Form

4.5 Selected Item Fillable Form



InPort
NMFS Enterprise Data Management Program

InPort Catalog Item Report

Printed on 2011-04-27 09:54 by INPOWN

PRJ: DOCKSIDE INTERVIEWS AND SAMPLES

Southeast Fisheries Science Center
Parent Catalog Item #1631 SEFSC Metadata Library

Draft

Catalog Item Identification

Catalog ID	1921	**Created**	2006-06-13	**By**	LWEINBERGER
Catalog Item Type	PRJ	**Modified**	2010-11-28	**By**	INPOWN
Name	DOCKSIDE INTERVIEWS AND SAMPLES				
Title	DOCKSIDE INTERVIEWS AND SAMPLES				
Abstract					
Purpose					
Notes					
Other Citation Details	Other citation: DOCKSIDE INTERVIEWS AND SAMPLES				
Supplemental Info					

Keywords

Keyword	Type	Thesaurus

Catalog Item Physical Location

State/Province		**Country**	
City			
Location Description			

Project Details

Project Type			
Project Status			
Collection Details			
[ ]	**Mandated?**	**By**	
Collection Type			
Collection Authority			
Collection Method			

Child Catalog Items

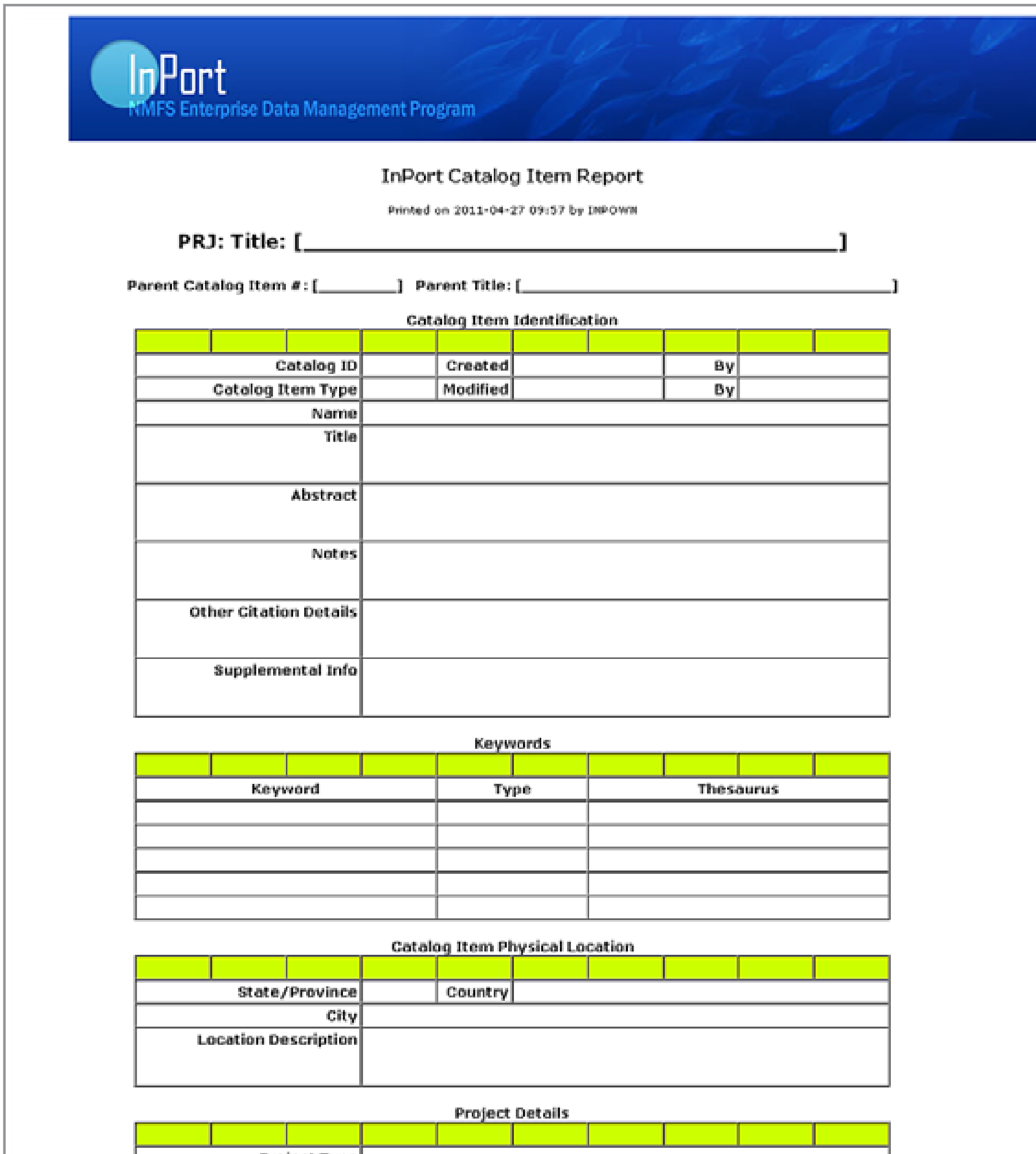
Users may wish to print out a catalog item form for the currently selected item where information already entered for the item is displayed along with blank fields for all other fields or sets of fields, in order to facilitate gathering information for completing the catalog item.

How to Generate a Selected Catalog Item Fillable Form

1. From the **CATALOG EDITOR**, select a Library or Catalog Item in the *Navigator* pane.
2. From the top menu bar select Reports>Fillable Catalog Item Forms>Selected
3. Use the browser print function to print the report. May also use the browser search or find function

Blank Catalog Item Type Fillable Form

4.6 Blank Project Item Form



InPort
NMFS Enterprise Data Management Program

InPort Catalog Item Report

Printed on 2011-04-27 09:57 by INPOWN

PRJ: Title: [____]

Parent Catalog Item #: [________] Parent Title: [______________________________]

Catalog Item Identification

Catalog ID		Created		By	
Catalog Item Type		Modified		By	
Name					
Title					
Abstract					
Notes					
Other Citation Details					
Supplemental Info					

Keywords

Keyword	Type	Thesaurus

Catalog Item Physical Location

State/Province		Country	
City			
Location Description			

Project Details

Project Type	

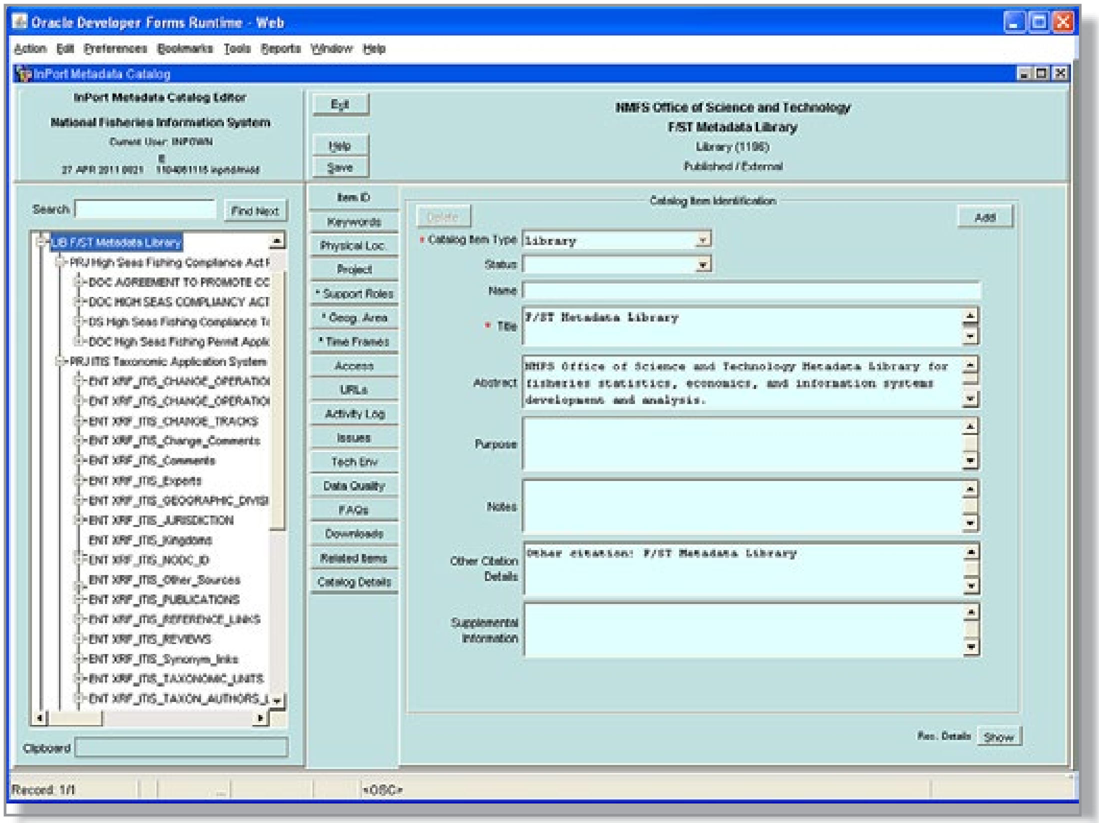
Users may wish to print out an appropriate blank catalog item form in order to facilitate gathering information for input to InPort.

How to Generate a Blank Catalog Item Type Fillable Form

1. From the **CATALOG EDITOR**, select a Library or Catalog Item in the *Navigator* pane.
2. From the top menu bar select Reports>Fillable Catalog Item Forms>[Document, Project, Data Set, Entity, Procedure]
3. Use the browser print function to print the report

Catalog Item Identification

4.7 Catalog Editor – Item Identification Tab



InPort Catalog Editor showing the Item Identification tab. This tab is common to every catalog item type and is used to describe the basic information about the identification, purpose and location of the catalog item.

Screen Item Descriptions

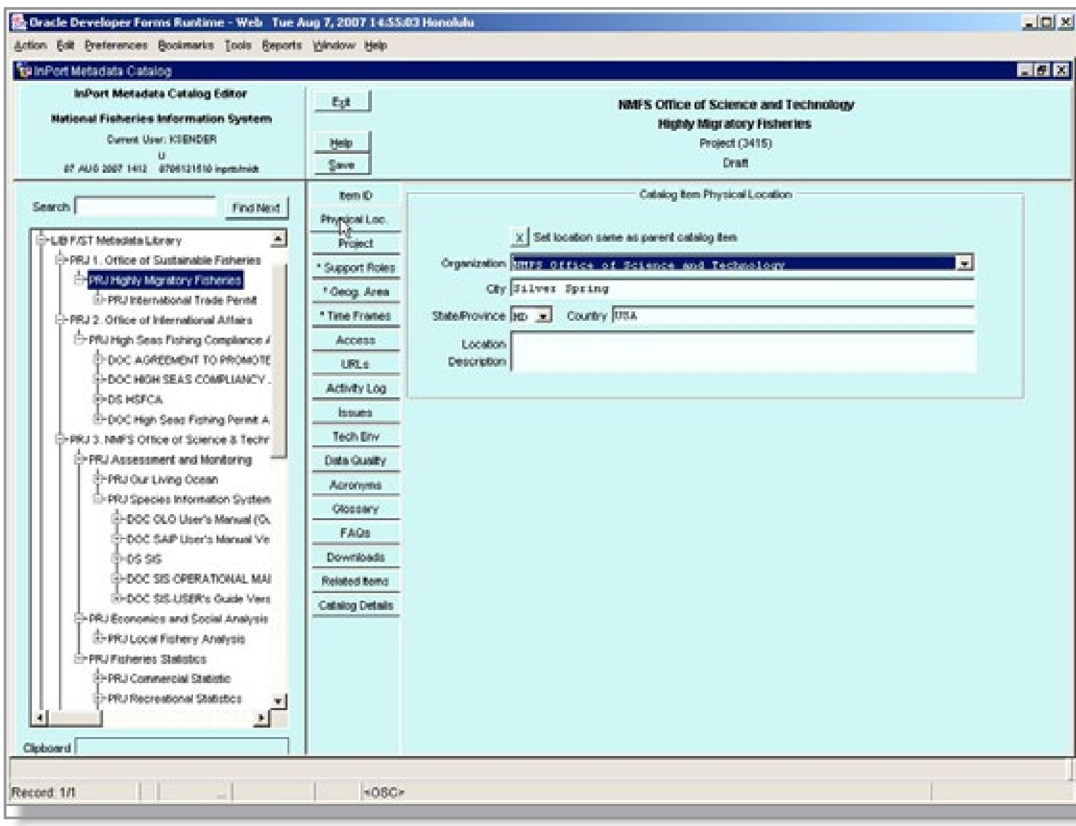
- **Item Type** - Type of catalog item. Options currently include: Data Collection Item, Data Set, Data Entity, Document, Procedure, and Project
- **Item Status** - Data status of this catalog item. Options include: Complete, In Work, Planned
- **Item Name** - Short name, alias, or familiar name of the catalog item
- **Item Title** - Title for the InPort metadata record. The title should be as descriptive as possible, employing terms that clearly identify the specific subject and unique contents of the record.
- **Abstract** - The abstract should clearly reference the specific subject and unique dimensions of the resource being documented, along with explicit consideration of major scientific concepts keywords, and other descriptive terms to aid system users in searching through the metadata records and identifying relevant ones. FGDC Reference
- **Purpose** - Purpose or a summary of intentions with which the item was developed
- **Notes** - General notes about this catalog item
- **Theme keywords** - Common use word or phrase to describe the subject of the data set
- **Place keywords** - Geographic name of a location covered by a data

set

- **Temporal keywords** - The name of a time period covered by a data set
- **Stratum keywords** - Name of a vertical location used to describe the locations covered by the data set
- **Other Citation Details** - Other information required to complete the citation
- **Supplemental Info.** - Supplemental Information that should accompany any distributed metadata for this item or data set. Other descriptive information about the data set
- **Catalog Item ID** - Catalog Item primary key
- **Publication status** - Publication status -- (U)npublished, (I)nternally Published, (E)xternally Published, (W)ithdrawn; displayed in header of the **CATALOG EDITOR**
- **Owner Org** - Organization that is the steward, owner, or caretaker of this data item

Physical Location

4.8 Catalog Editor – Physical Location Tab



InPort Catalog Editor showing the Physical Location tab. This tab is common to every catalog item type and is used to describe physical location of the catalog item.

Screen Item Descriptions

- **Physical Loc - Organization** - Organization where catalog item is physically located
- **Physical Loc - City** - Physical location of the catalog item -- city
- **Physical Loc - State/Province** - Physical location of the catalog item

-- state or province

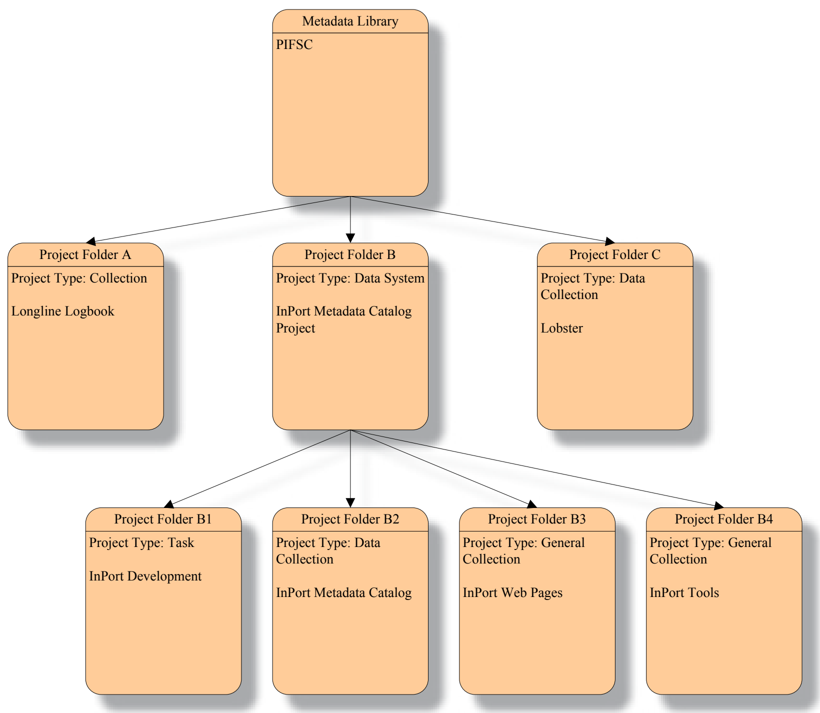
- **Physical Loc - Country** - Physical location of the catalog item -- country
- **Physical Loc - Description** - Physical location of the catalog item -- narrative description

Catalog Item Types

Project

Project type catalog items can be thought of as metadata portfolio or folder. A Project catalog item might, indeed, describe a real-life data project. It might also be used as a convenient way to describe a set of related items under which each of the collected items may be cataloged.

4.9 Example of a Library hierarchy with multiple levels of Projects

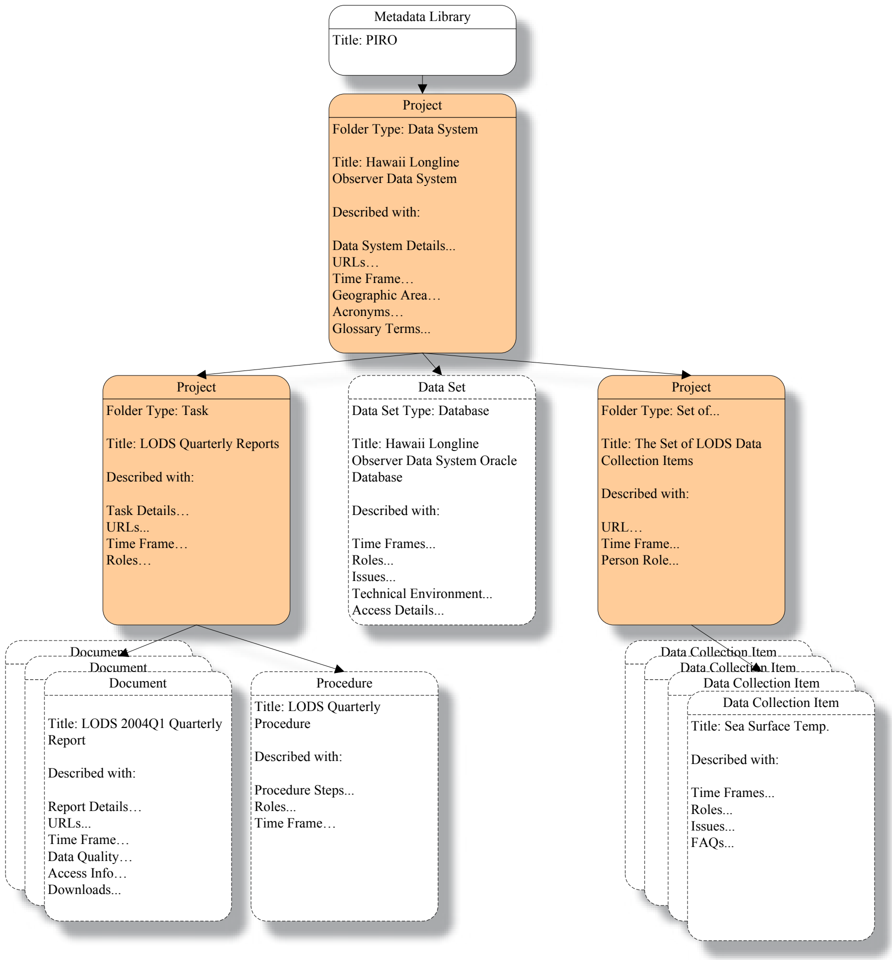


The above example shows multiple levels of catalog Projects in a Library hierarchy. Each Project folder might contain many other catalog item types besides those shown in the example.

A catalog item of type Project can be thought of as a metadata folder or portfolio that contains one or more Catalog Items of any type - including other Project items. Each Project can contain the metadata for an organization's:

- Program
- Project
- Task
- Activity
- Data Collection Effort
- Data System
- Set of… (related catalog items, such as documents, collection forms, data collection items, etc.)

4.10 Example of catalog Projects in a Library hierarchy



InPort Projects can be thought of as metadata folders that can be used to describe an organization's project, program, task, or activity. A Project may be the parent item of other projects.

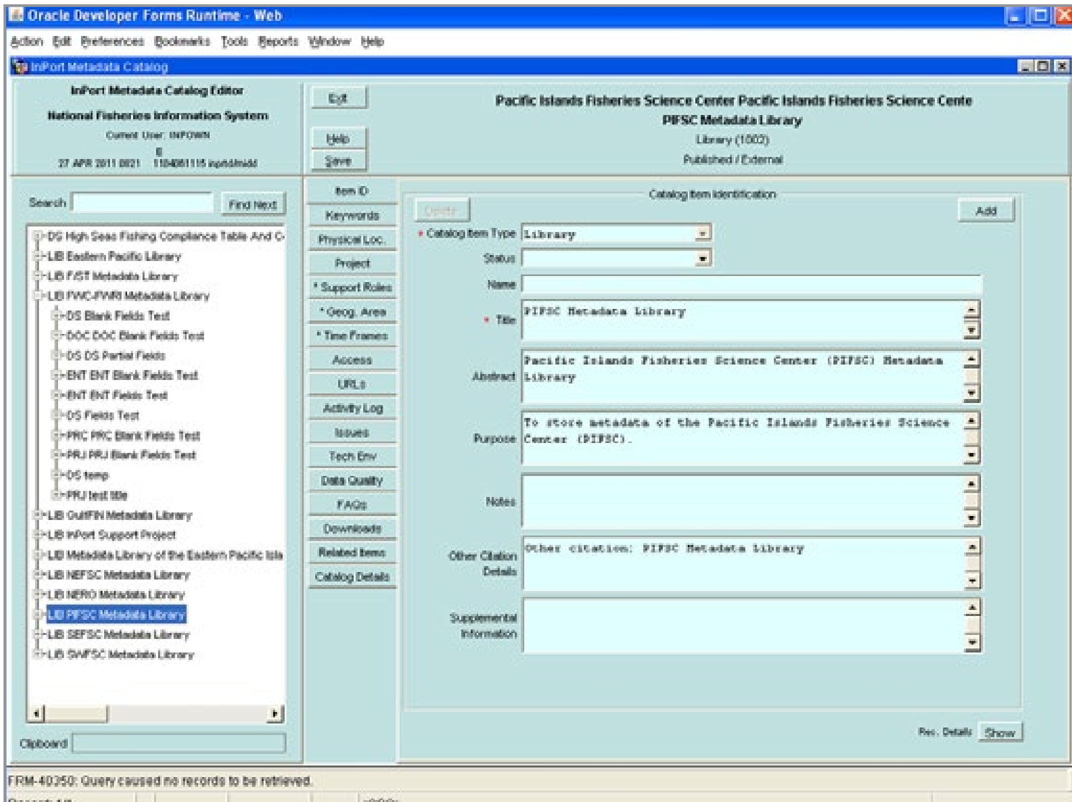
Each Project can be fully described, just like any other catalog item type, and can include details of the following detail modules:

- Support Roles
- Geographic Area
- Time Frames
- Access/Security Info
- URLs
- Activity Log
- Issues
- Technical Environment
- Data Quality
- Acronyms
- Glossary Terms
- FAQs
- Downloads
- Related Items

Each Project can itself contain child catalog items of type:

- Project
- Data Set
- Data Entity, e.g., tables, spreadsheets, maps, etc.
- Documents
- Procedure

4.11 Catalog Editor – Project Tab



After completing the Item ID tab for a new catalog Project, the user should complete the Project tab to specify the type of project. Complete the Collection Details section only if the Project describes a data collection effort.

Screen Item Descriptions

- **Project Type** - Type of project. Options include: Project, Program, Data Collection, Data System, Task, Activity, Set of ... (User defined)
- **Project Status** - Status of the Project (Active, Completed, In Development, Suspended)
- **Mandated?** - Is this project required by law or other regulation?
- **Mandated By** - What law or regulation mandates this project?
- **Collection Type** - (This and the following two items should be filled out for data collection projects.) Type or category of the collection project: e.g., Landings, Logbook, Observer, Permit, Socio-economic, VMS, other
- **Collection Authority** - Administrative unit of government authorizing/funding this collection
- **Collection Method(s)** - Method(s) used to collect data: Electronic, Paper, Electronic and Paper, etc.

How to Document a Project, Program, Task, or Activity

1. From the **INPORT CATALOG TOOLS** menu, click on the button beside *Catalog Editor*.
2. Select and highlight the appropriate parent Library name in the *Navigator* pane.
3. Right-click and select menu option *New Item* or click the *Add* button in the *Editor* pane.
4. In the Catalog Item Type pop-list, select `Project`.
5. In the Editor pane, fill out the Identification in the Item ID Tab. Starred items are required fields.
6. Click on the Project Tab and complete fields that can describe the project or activity. Note that Collection Project items are not required for non-data collection projects.
7. The user may further document the project using the available Detail Module Tabs. (See Detail Modules section for further information.)
8. Click the *Save* button.

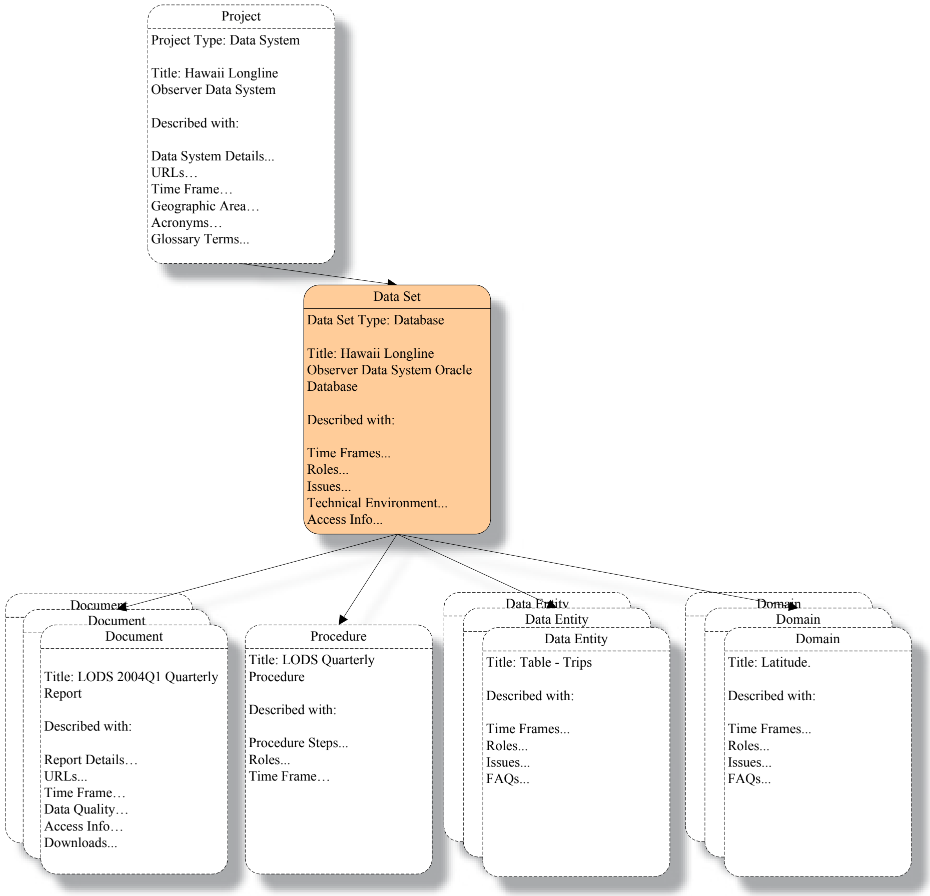
Data Set

A catalog item of type Data Set can describe...

- a Database
- a collection of related data Files
- a set of reports that contain data
- other (as described in Abstract)

An InPort catalog item of type Data Set is used to describe a set of related objects that contain data such as a database, a collection of flat files, or a set of reports that contain data. Data Sets contain one or more Data Entities (e.g., Tables, Reports, Files) that describe their attributes (fields or columns).

4.12 Example of a catalog Data Set in a Library hierarchy



Data Sets will most likely have one or more Data Entity child items.

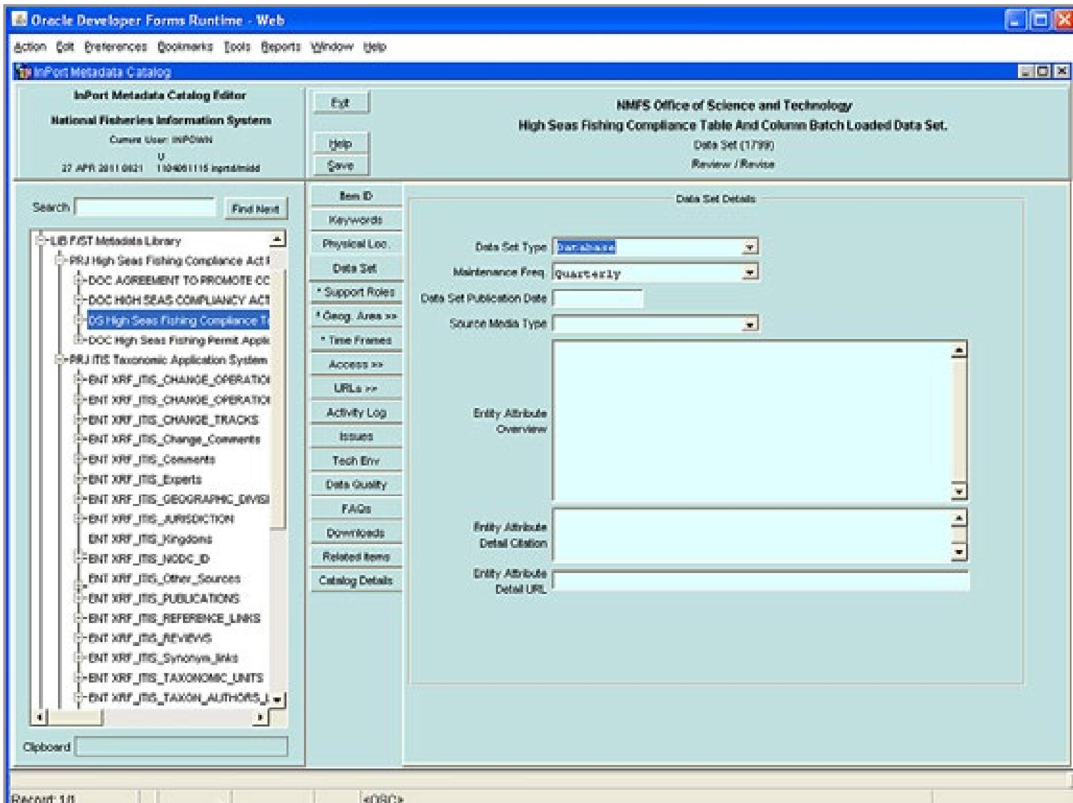
Each Data Set can be fully described, just like any other catalog item type, and can include details of the following detail modules:

- Support Roles
- Geographic Area
- Time Frames
- Access/Security Info
- URLs
- Activity Log
- Issues
- Technical Environment
- Data Quality
- FAQs
- Downloads
- Related Items

Each Data Set can itself contain child catalog items of type:

- Data Set
- Data Entity, e.g., tables, spreadsheets, maps, etc.
- Data Collection Item
- Document
- Procedure

4.13 Catalog Editor – Data Set Tab



After completing the Item ID tab for a new catalog Data Set, the user should complete the Data Set tab to specify the type of data set This tab also allows for descriptions of the entities and attributes - tables and columns - contained in the data set.

Screen Item Descriptions

- **Data Set Type** - A general description of the Data Set. Examples: Database, Flat files, Mixed, Set of reports, etc.
- **Data Set Maintenance Frequency** - Frequency w/ which changes and additions are made (e.g., Continuous, Weekly, Quarterly)
- **Data Set Entity - Attribute Overview** - Detailed summary of the information contained in a data set
- **Data Set Entity - Attribute Detailed Citation** - Reference to the complete description of the entities, including column names and formats
- **Data Set Entity - Attribute Detailed Citation URL** - URL to entity attribute detail citation
- **Source Media Type** - Data Set source media type

How to Catalog a Data Set, Database, or File Collection

1. From the **INPORT CATALOG TOOLS** menu, click on the button beside *Catalog Editor*.
2. Select and highlight the appropriate parent Library name in the *Navigator* pane.
3. Select and highlight the Catalog Item under which the new Data Set will be cataloged.
4. Right-click and select menu option *New Item* or click the *Add* button in the *Editor* pane.

5. In the Catalog Item Type pop-list, select `Data Set`.
6. In the *Editor* pane, fill out the Identification information in the *Item ID* tab. Starred items are required fields.
7. Click on the *Data Set* tab and complete the fields that can best describe the data set, database, or file collection that is being cataloged.
8. The user may further document the data set using the various Detail Module tabs. (See Detail Modules section for further information.)
9. Click the *Save* button.

Data Entity

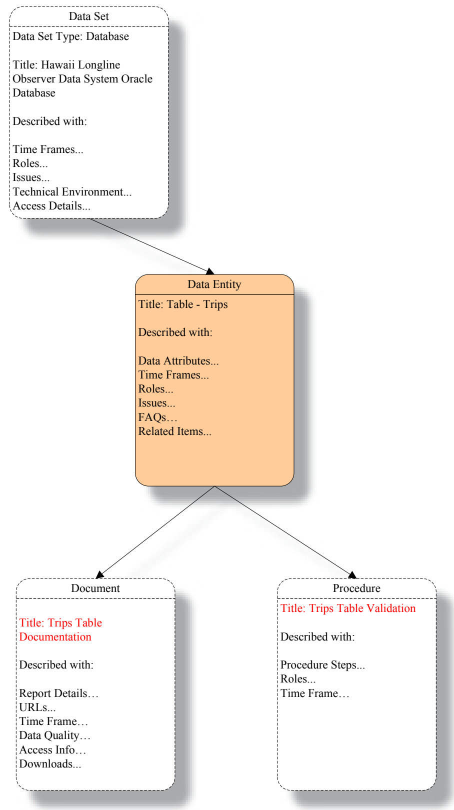
Catalog Item type Data Entity is used to describe a data table or data file or report that itself contains attributes (columns or fields of data). InPort Data Entities are typically child items of InPort Data Sets. Data Entities may have child items of type Procedure or Document.

A catalog item of type Data Entity can describe...

- a data table
- a data file
- a data report
- a spreadsheet
- a data entry form with data
- an xml file
- other (user defined)

Unlike other Catalog Item types, Data Entities and their Attribute information may be batch loaded into InPort see Chapter 7 for complete information.

4.14 Example of catalog Data Entity in a Library hierarchy



Data Entities are most frequently thought of as Tables. Data Entities normally are child items of a catalog Data Set.

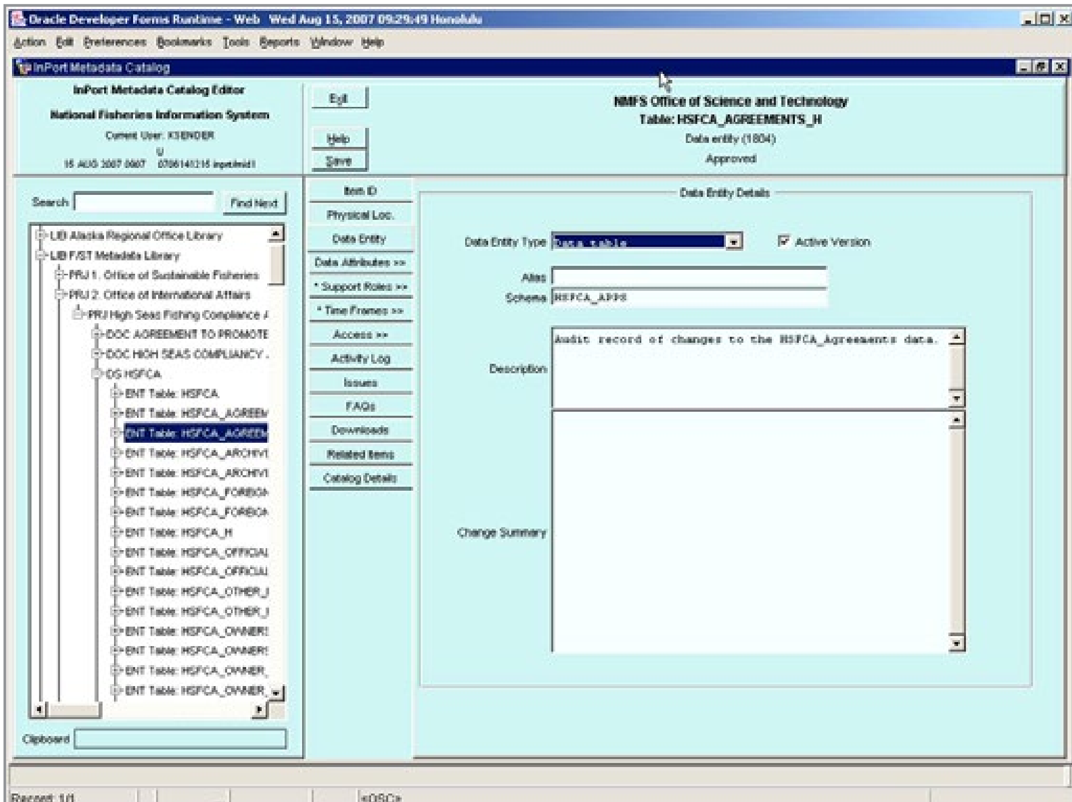
Each Data Entity can be fully described, just like any other catalog item type, and can include details of the following Detail Modules:

- Data Attributes
- Support Roles
- Time Frames
- Access/Security Info
- URLs
- Activity Log
- Issues
- Technical Environment
- Data Quality
- FAQs
- Downloads
- Related Items

Each Data Entity can itself contain child catalog items of type:

- Document
- Procedure

4.15 Catalog Editor - Data Entity Tab



After completing the Item ID tab for a new catalog Data Entity, the user should complete the Data Entity tab to describe the type of entity. Data Entity and Attribute information may also be loaded into InPort through the Batch Loader process.

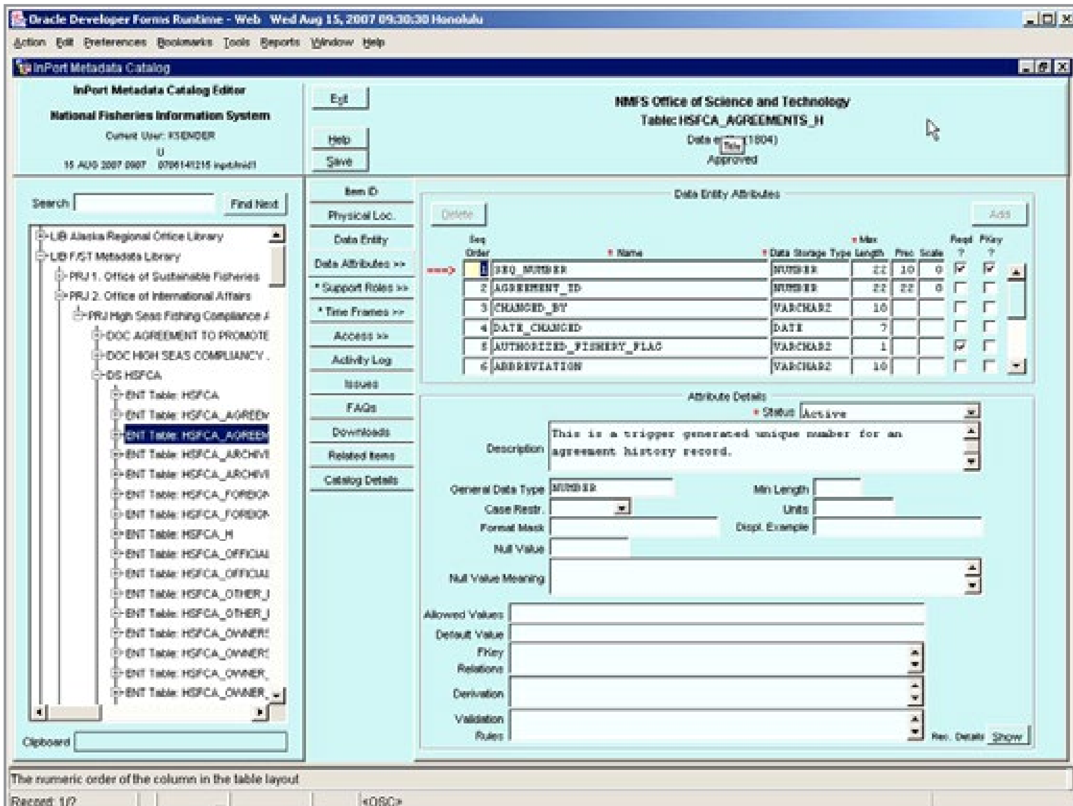
Screen Item Descriptions

- **Entity Type Code** - The word 'Entity' is used to describe a data holding of some type. Entity types include Data file, Data table, Report, Spreadsheet, Form (data collection or data entry), XML document, etc)
- **Active Version?** - Is this the active (currently in use) version of the table/entity?
- **Alias** - Code or short name for the table or entity (e.g., org for organization)
- **Schema Name** - If Oracle, SQL Server, or MySQL, the schema name in which the table resides
- **Description** - Detailed description of the entity
- **Change Summary** - Summary description of changes to this version of the table from the previous version

Data Attributes

Each data attribute is significant as a piece of data collected and stored in a table, field, cell, or form or a calculated value. *Data attribute records always reside under a Data Entity parent item.*

4.16 Catalog Editor - Data Attributes Tab



After completing the Data Entity tab, the user can use the Data Attributes tab to describe the details of the individual attributes - columns - contained in the data entity. Note that the user may choose to use the Batch Loader process to load table/column information into the InPort Catalog.

Screen Item Descriptions

- **Order** - The numeric order of the column in the table/spreadsheet layout
- **Attribute Name** - The name of the attribute (column name)
- **Data Storage Type** - The architectural data type (such as Oracle's VARCHAR2 data type)
- **Max Length** - Maximum length of this column for character-type data; max length for Oracle NUMBER data type is always 22; see also definitions for data_precision and data_scale for NUMBER data type; max length is not meaningful for Oracle DATE data type
- **Data Precision** - For Oracle NUMBER data type, the total number of digits. Oracle guarantees the portability of number with precision ranging from 1 to 38.
- **Data Scale** - For Oracle NUMBER data type, the number of digits to the right of the decimal point. The scale can range from -84 to 127. 'Decimal' length from other database types should be put in this column
- **Required?** - Is this column always required (cannot be null)?
- **Primary Key?** - Is this column the primary key or part of the primary key?
- **Status** - Status of this attribute (Active, Inactive, In Development, In Review). The default is Active)
- **Description** - Narrative description of the attribute

- **Data Collection Item** - InPort Data Collection Item associated with this attribute. (This item is not currently available.)
- **General Data Type** - The general data type of the column (Character, Integer, Real Number, Date)
- **Case Restriction** - Indicate whether the column is to be stored as Upper, Lower or Mixed case
- **Format Mask** - Pattern used as a format aid during data entry
- **Display Example** - An example of how the data will be displayed to users
- **Minimum Length** - Minimum length of this column for character-type data; see also definitions for data_precision and data_scale (NUMBER data type); min length not meaningful for Oracle DATE data type
- **Unit of Measure** - If applicable, record the proper unit of measure for this column (e.g., grams, inches, degrees Fahrenheit, etc.)
- **Null Value** - The symbol used in this table, view or report to represent a null value
- **Null Value Meaning** - If a value is used to represent a null, what is the specific meaning of the value
- **Domain** - The InPort Domain used by this attribute. Please use column Validation_Rules to indicate an Oracle Domain used by this attribute.
- **Allowed Values** - List of possible values or range of values for this column
- **Default Value** - If desired, the value to be placed in the column when no data is entered
- **Foriegn Key Relations** - List tables with which this column has foreign key relations
- **Derivation** - If this data element is derived, give the algorithm or expression that describes how this data element's value is established
- **Validation Rules** - List validation rules or references to validation rules for this column
- **Version** - Column not currently in use. Column definition: Latest version of this column (this is NOT the data set version number)
- **Decimals** - Column not currently in use

How to Catalog a Data Entity with Data Attributes (Tables and Columns)

Note that there are two methods for cataloging Data Entities within InPort. This method outlines the process for hand entering information. Alternately, if the Data Entity is a table in a database, the information may be downloaded from the user's local data dictionary and uploaded with the InPort Batch Load tools (see Batch Loading section of this user guide).

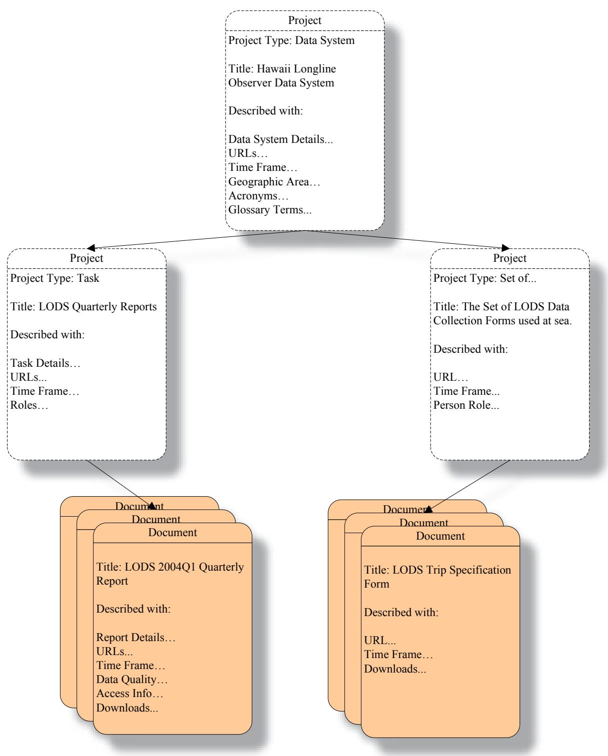
1. From the **INPORT CATALOG TOOLS** menu, click on the button beside *Catalog Editor*.
2. Select and highlight the appropriate parent Library name in the *Navigator* pane.
3. Select and highlight the Catalog Item - most likely of type Data Set - under which the *Data Entity* will be cataloged.
4. Right-click and select menu option *New Item* or click the *Add* button in the *Editor* pane.
5. In the Catalog Item Type pop-list, select `Data Entity`.
6. In the *Editor* pane, fill out the Identification information in the *Item ID* tab. Starred items are required fields.

7. Click on the *Data Entity* tab and complete the fields that can best describe the document that is being cataloged.
8. Click on the *Attributes* tab to fill out information about the attributes or columns associated with the *Data Entity* item.
9. The user may further document the *Data Entity* using the various Detail Module tabs that are available for data entities.
10. Click the *Save* button.

Document

A catalog item of type Document can describe any existing document. Most frequently, documents are child items of the catalog items they are derived or relate to. However, users may wish to create document folders via InPort Project catalog items if they wish to organize document collections.

4.17 Documents in a Library Hierarchy



Documents cannot have child catalog items. If a document contains data that should be described with a procedure or data attributes, then it would be preferable to catalog the item as a Data Entity.

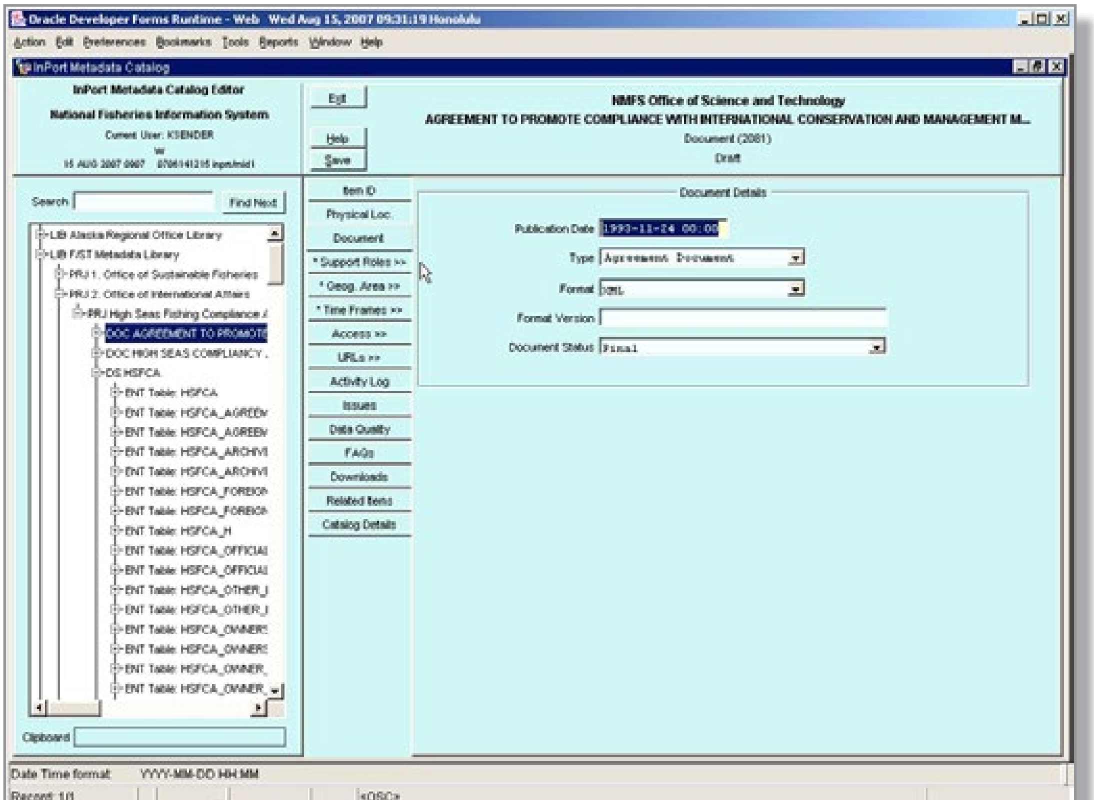
Each Document can be fully described, just like any other catalog item type, and can include details of the following Detail Modules:

- Support Roles
- Geographic Area
- Time Frames
- Access/Security Info
- URLs
- Activity Log
- Issues

- Data Quality
- FAQs
- Downloads
- Related Items

Documents cannot themselves contain other child catalog items. If a document contains data, and thus needs to be described with procedures or attributes, then it should probably be cataloged as a catalog type Data Entity.

4.18 Catalog Editor - Document Tab



After completing the Item ID tab, the user can use the Document tab to describe the details of the document being cataloged.

Screen Item Descriptions

- **Document Publication Date** - Date the document was published
- **Document Type** - Document types include (but are not limited to): Thesis, Report, Book, Conference Proceedings, Journal article, Meeting Minutes, Newsletter, FAQ, Technical Memorandum, Administrative Report, Graphic, Map, Legal Document, Letter, Presentation, Historical Account, Reference, Excerpt, Interview, News Release, Specifications
- **Document Format Type** - Valid document formats include (but are not limited to): DOC, WPD, TXT, HTM
- **Document Format Version** - The version of the software in which the document is stored
- **Document Status** - The development stage of the document: Draft, Final, In Review, Planned, Published

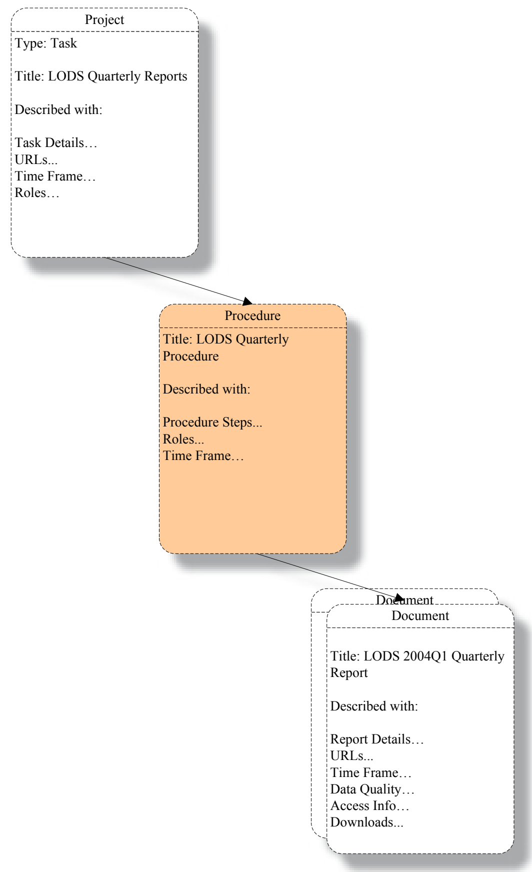
How to Catalog a Document

1. From the **INPORT CATALOG TOOLS** menu, click on the button beside *Catalog Editor*.
2. Select and highlight the appropriate parent Library name in the *Navigator* pane.
3. Select and highlight the Catalog Item under which the document will be cataloged.
4. Right-click and select menu option *New Item* or click the *Add* button in the *Editor* pane.
5. In the Catalog Item Type pop-list, select `Document`.
6. In the *Editor* pane, fill out the Identification information in the *Item ID* tab. Starred items are required fields.
7. Click on the *Document* tab and complete the fields that can best describe the document that is being cataloged.
8. The user may further document the project using the various Detail Module tabs that are available for documents.
9. Click the *Save* button.

Procedure

A catalog item of type Procedure can describe a procedure, protocol, or process that is relevant to a parent catalog item. Documenting the procedures used to collect data, create and submit an annual data report, or even a procedure to extract data from a database are invaluable for documenting data collections and aiding future users and data managers on how to process and desseminate data.

4.19 Procedures in a Library Hierarchy



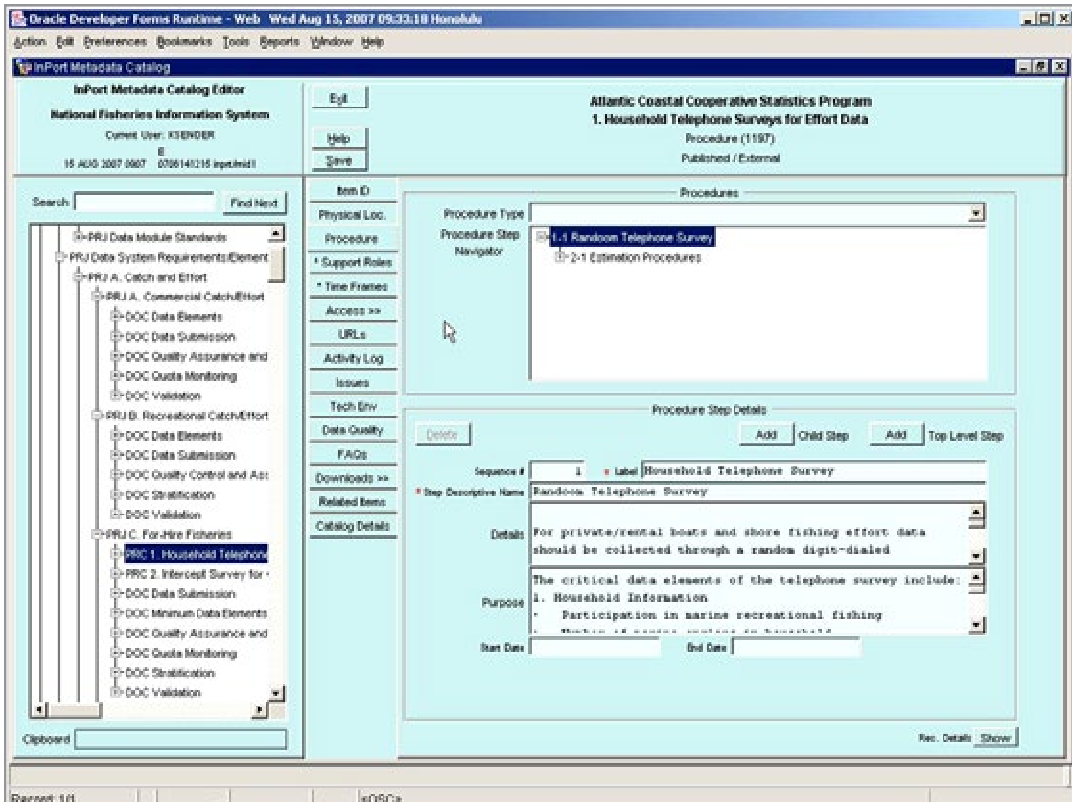
Each Procedure can be fully described, just like any other catalog item type, and can include details of the following Detail Modules:

- Support Roles
- Time Frames
- Access/Security Info
- URLs
- Activity Log
- Issues
- Technical Environment
- Data Quality
- FAQs
- Downloads
- Related Items

Each Procedure can itself contain child catalog items of type:

- Document
- Procedure

4.20 Catalog Editor – Procedure Tab



After completing the Item ID tab, the user can use the Procedure tab to list the detailed steps of the procedure being cataloged. Note that the user may also choose to add a child document item to the procedure rather than cataloging the procedure steps.

Screen Item Descriptions

- **Procedure Type** - The type of procedure. Valid entries include but are not limited to: Acquisition, Manipulation
- **Step Order** - The numerical order of the step in the procedure
- **Step Label** - Step label
- **Step Name** - Descriptive name of the step in the procedure (more descriptive than label
- **Step Details** - Detailed narrative explaining the procedure
- **Step Purpose** - Purpose of the procedure
- **Start Date** - Start date of the procedure
- **End Date** - End date of the procedure

How to Catalog a Procedure

1. From the **INPORT CATALOG TOOLS** menu, click on the button beside *Catalog Editor*.
2. Select and highlight the appropriate parent Library name in the *Navigator* pane.
3. Select and highlight the Catalog Item under which the new procedure will be cataloged.
4. Right-click and select menu option *New Item* or click the *Add* button in the *Editor* pane.
5. In the Catalog Item Type pop-list, select `Procedure`.

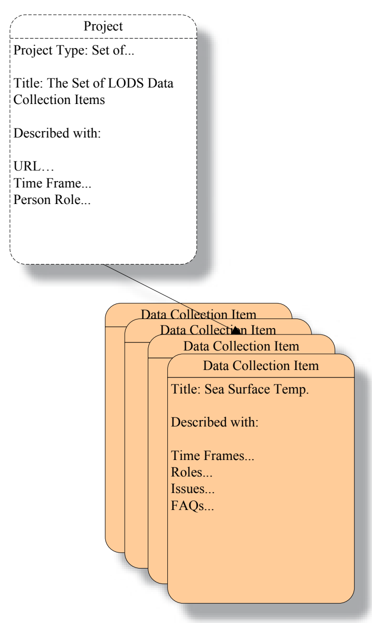
6. In the *Editor* pane, fill out the Identification information in the *Item ID* tab. Starred items are required fields.
7. Click on the *Procedure* tab and complete the fields that can best describe the procedure that is being cataloged.
8. The user may further document the Procedure using the various Detail Module tabs that are available for procedures.
9. Click the *Save* button.

Data Collection Item

Note that the Data Collection Item module will be released for use in a subsequent version of InPort. We include it here in order for users to become familiar with this new and powerful concept of documenting individual collected data types.

The catalog item type Data Collection Item is used to describe the collection of a specific type of information within a data collection project/effort. Examples of data collection items include: trip number, sea-surface temperature, and hook type. A well documented data collection system will include information on the history, purpose, collection methods, and business rules for each type of information, or data collection item, which is collected.

4.21 Data Collection Items in a Library Hierarchy



Each Data Collection Item can be fully described, just like any other catalog item type, and can include details of the following Detail Modules:

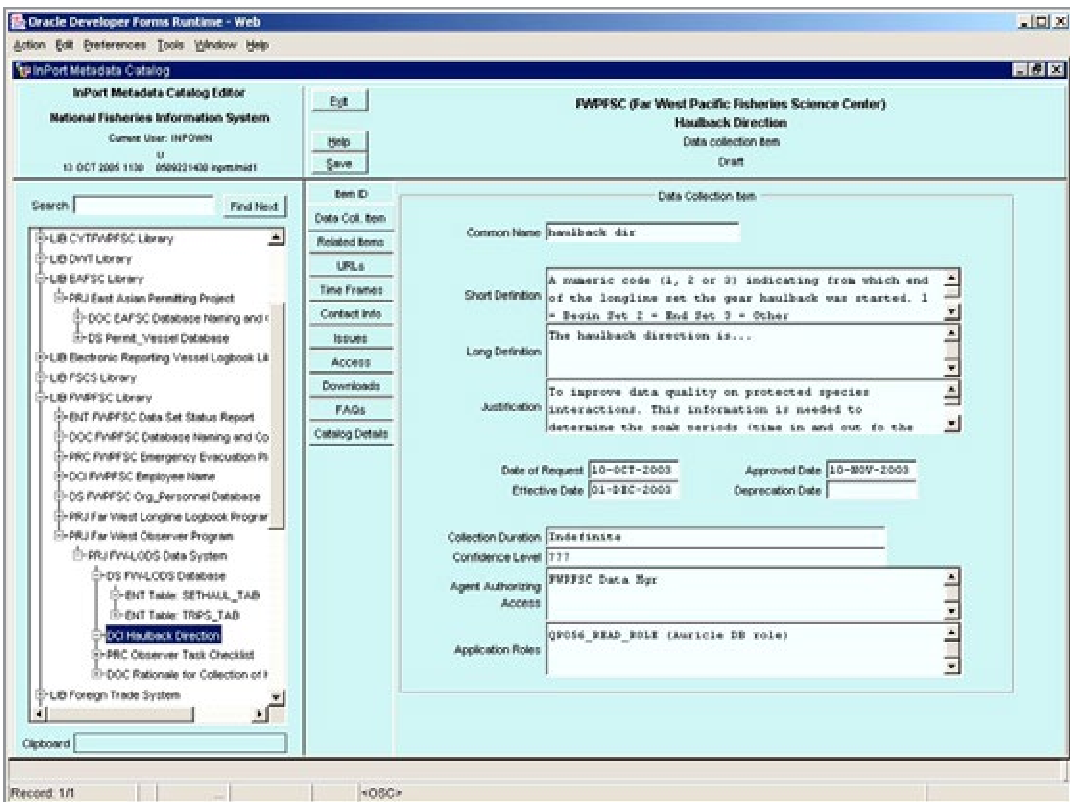
- Related Items
- URLs
- Time Frames
- Contact Information (Person/Org Roles)

- Issues
- Data Quality
- Access Info
- Downloads
- FAQs
- Glossary Terms

Each Data Collection Item can itself contain child catalog items of type:

- Document
- Procedure

4.22 Catalog Editor – Data Collection Item Tab



After completing the Item ID tab, the user can use the Data Collection Item tab to describe the details pertinent to the item.

Screen Item Descriptions

- **Short Definition** - A brief definition of the data collection item
- **Long Definition** - Detailed, comprehensive definition of the data collection item
- **Justification** - Rationale for defining this data collection item. This should include any legal mandates or local, regional or national requirements
- **Request Date** - Date this catalog item was requested to become a data collection item within this project
- **Approval Date** - Date this data collection item was approved for use in this project
- **Effective Date** - Date this data collection item becomes effective within this project
- **Retired Date** - Date after which this data collection item is no longer used by this project

How to Catalog a Data Collection Item

1. From the **INPORT CATALOG TOOLS** menu, click on the button beside *Catalog Editor*.
2. Select and highlight the appropriate parent Library name in the *Navigator* pane.
3. Select and highlight the Catalog Item under which the new data collection item will be cataloged.
4. Right-click and select menu option *New Item* or click the *Add* button in the *Editor* pane.
5. In the Catalog Item Type pop-list, select `Data Collection Item`.
6. In the *Editor* pane, fill out the Identification information in the *Item ID* tab. Starred items are required fields.
7. Click on the *Data Collection* tab and complete the fields that can best describe the item that is being cataloged.
8. The user may further document the Data Collection Item using the various Detail Module tabs that are available for this catalog item type.
9. Click the *Save* button.

Catalog Detail Modules

Detail Modules may be used to describe individual Catalog Items in greater detail. For example, a database table (Data Entity) may be described by listing its columns (Data Attributes); a Data Collection Item can be further described using a Time Frame to define when is was collected and a Procedure for how it was collected.

The current list of Detail Modules include:

- Support Roles/Contact Information
- Geographic Area
- Time Frames
- Access/Security Info
- URLs
- Activity Log
- Issues
- Technical Environment
- Data Quality
- Acronyms
- Glossary Terms
- FAQs
- Downloads
- Related Items

InPort has been designed to allow for the development of additional Detail Modules. Modules already in development include:

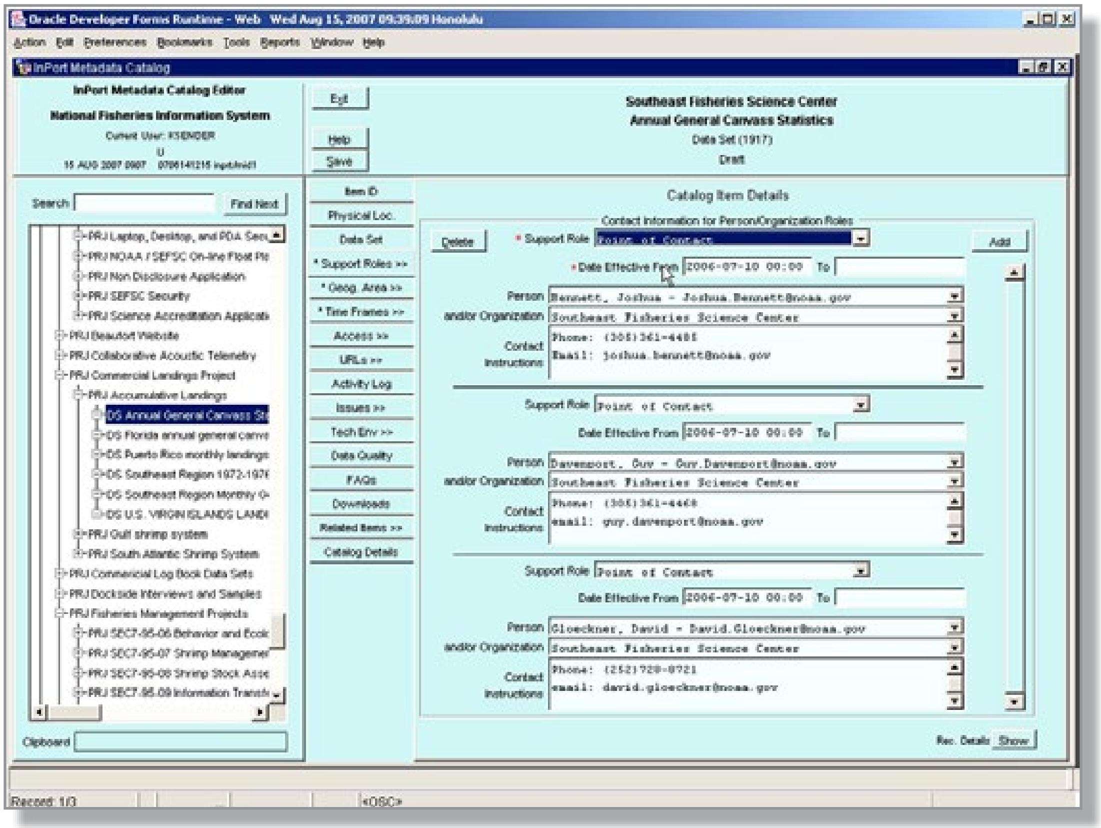
- Data Distribution Details
- Geospatial Details (for cataloged data products)
- Enhanced Technical Environment Details
- Enhanced Keyword Module with Keyword Thesauri

Definitions for each item within a given Detail Module can be accessed by right-clicking on the canvas area of the *Editor* pane for the particular tab of interest, and selecting `Editor Help`.

Support Roles Module

Each catalog item support role is significant as a job or responsibility for the data described by the catalog item, (e.g., data steward, owner, contributor, etc.). A catalog item Support Role may befilled by a Person or an Organization that has been registered within the InPort Catalog. If a user cannot locate the person or organization required for the support role, then the user should report this to their InPort Librarian who can complete the registration.

4.23 Catalog Editor – Support Role Tab



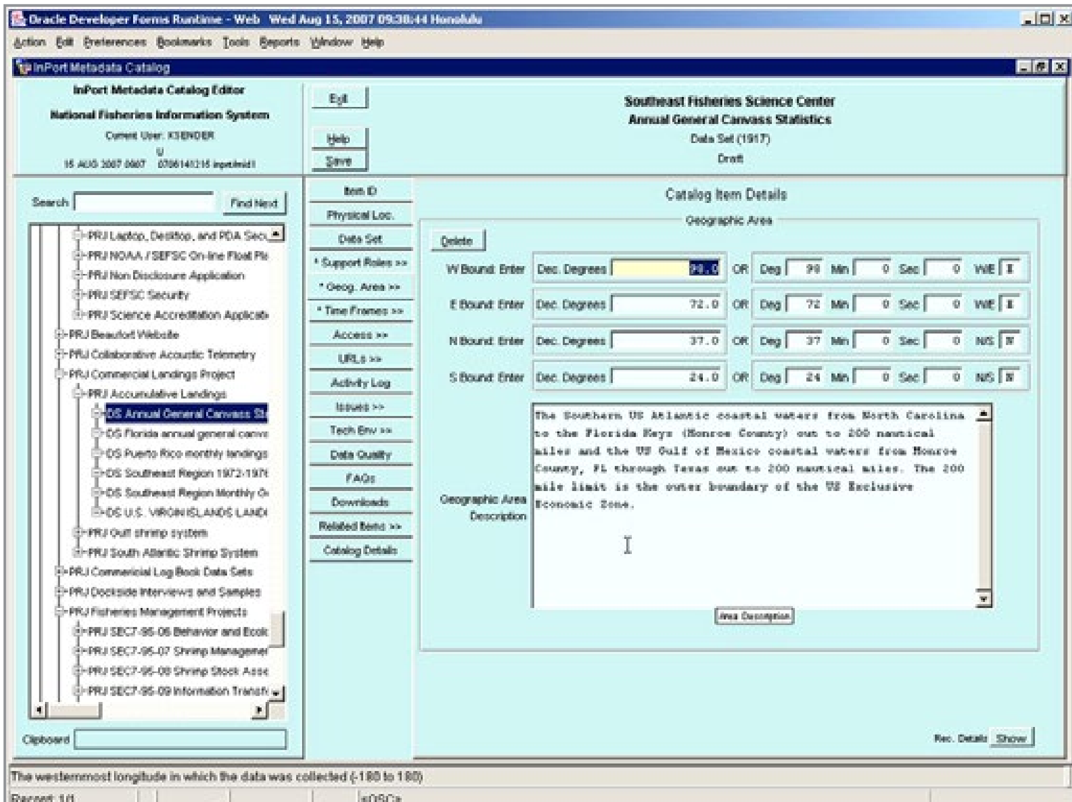
Jobs or responsibilities for the data described in the catalog item, including the person and organization assigned to that role.

Screen Item Descriptions

- **Role Begin Date** - Role was active starting on this date
- **Role End Date** - Role becomes inactive on this date
- **Name of person** - Name of the person filling the support role
- **Name of organization** - Name of the organization filling the support role
- **Contact Instructions** - Supplemental instructions on how or when to contact the individual or organization

Geographic Area Module

4.24 Catalog Editor - Geographic Area Tab



Spatial bounds and geographic description of the catalog item.

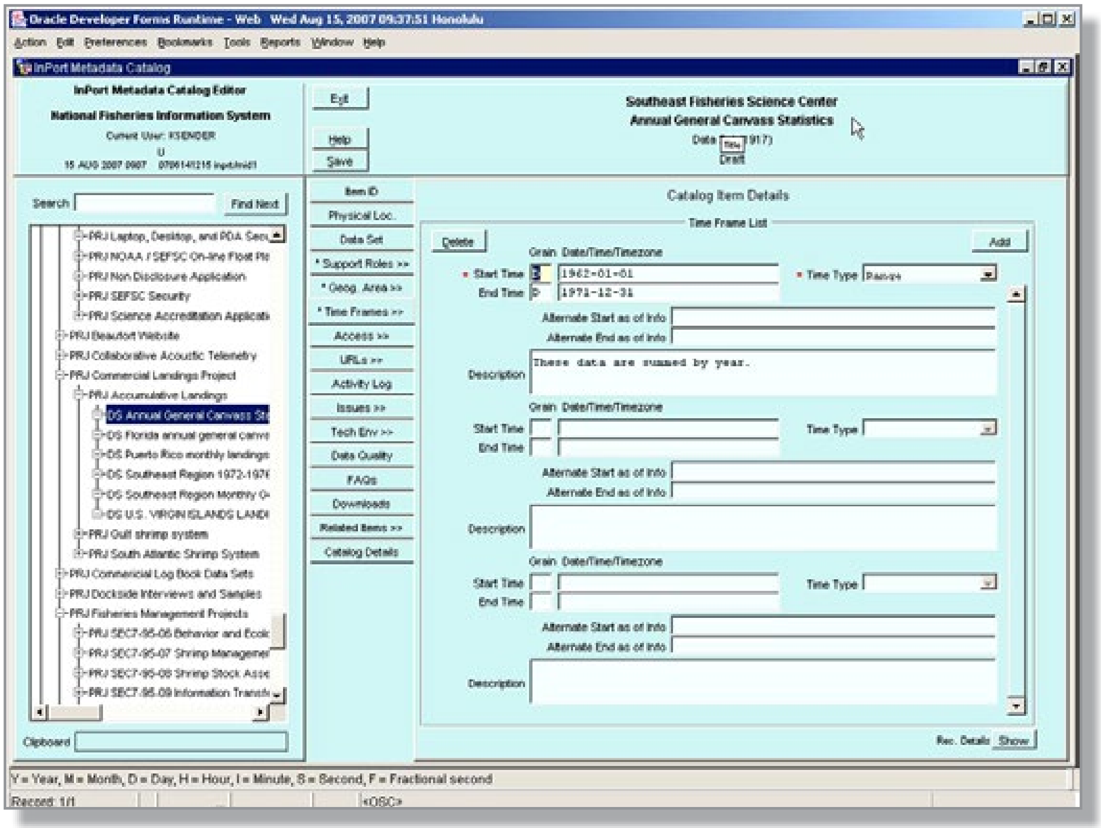
Screen Item Descriptions

- **Eastern Boundary** - The easternmost longitude in which the data was collected. Use decimal degrees or enter separate integer values for position parts (degrees, minutes, seconds) and direction (W/E).
- **Western Boundary** - The western most longitude in which the data was collected. Use decimal degrees or enter separate integer values for position parts (degrees, minutes, seconds) and direction (W/E).
- **Northern Boundary** - The northernmost latitude in which the data was collected. Use decimal degrees or enter separate integer values for position parts (degrees, minutes, seconds) and direction (N/S).
- **Southern Boundary** - The southernmost latitude in which the data was collected. Use decimal degrees or enter separate integer values for position parts (degrees, minutes, seconds) and direction (N/S).
- **Southern Boundary** - The southernmost latitude in which the data
- **Geographic Area** - The geographic area in which a particular activity documented in the metadata record occurred. Include landmass info, island groups, ocean sector, etc.

Time Frame Module

Time frame of the data collection event. This may be either a date/time range or a single date/time. Multiple Time Frames may be entered to document version changes or other events significant to the catalog item.

4.25 Catalog Editor - Time Frames Tab



Date/time of the data collection event. This may be listed as a single date/time, a date/time range, multiple date/times or multiple date/time ranges.

Screen Item Descriptions

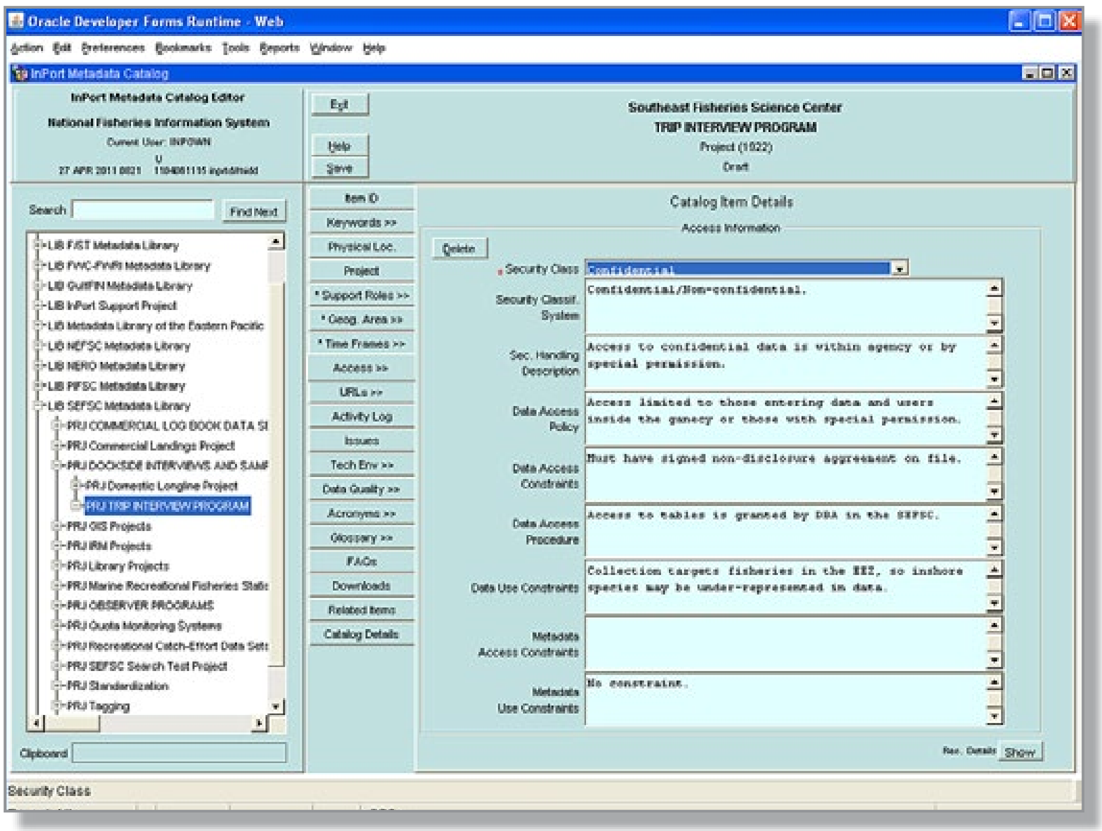
- **Start Datetime Granularity** - Date/Time Granularity, e.g., Y(ear), M(onth), etc., allows the user to specify the smallest element in the data/time string. Y = Year, M = Month, D = Day, H = Hour, I = Minute, S = Second, F = Fractional second. When any level of time is specified, the user must specify the time zone. Example: including time zone: 1987-12-13 12:35 -10:00
- **Start Datetime** - The date/time when the activity described in the data collection event record occurred or was initiated
- **Time Frame Type** - Time Frame types: 1) Discrete - a single date/time measure 2) Range - a date/time period with both start and end dates 3) Continuing - has a begin date but no end date
- **End Datetime Granularity** - Date/Time Granularity, e.g., Y(ear), M(onth), etc., allows the user to specify the smallest element in the data/time string. Y = Year, M = Month, D = Day, H = Hour, I = Minute, S = Second, F = Fractional second. When any level of time is specified, the user must specify the time zone. Example: including time zone: 1987-12-13 12:35 -10:00
- **End Datetime** - The date/time when the activity described in the metadata record was completed
- **Start Event** - The activity (e.g., trip number) that signaled the beginning of the activity described in the metadata record
- **End Event** - The activity that signaled the completion of the activity described in the metadata. Example: The data collection ended with Trip #1405

- **Description** - Narrative description of the time frame. Include the time zone, if significant.

Data Access Module

Information about the methods and constraints of accessing the data represented by the catalog item.

4.26 Catalog Editor – Access Tab



Details on the restrictions and legal prerequisites for accessing the data. Includes any access constraints applied to assure privacy or intellectual property and any special restrictions on the use of the data.

Screen Item Descriptions

- **Security Class** - The level of security assigned by the Data Steward to this catalog item
- **Security Classification System** - Name of handling restrictions on the data set
- **Security Handling Description** - Additional information about the restrictions on handling the data set
- **Access Policy** - General description of the policies governing release of this data
- **Access Constraint** - Restrictions and legal prerequisites for accessing the data set. Includes any access constraints applied to assure privacy or intellectual property and any special restrictions on the use of the data.
- **Access Procedure** - Narrative description of the steps required to obtain access to the data
- **Metadata Use Constraint** - Restrictions and legal prerequisites for

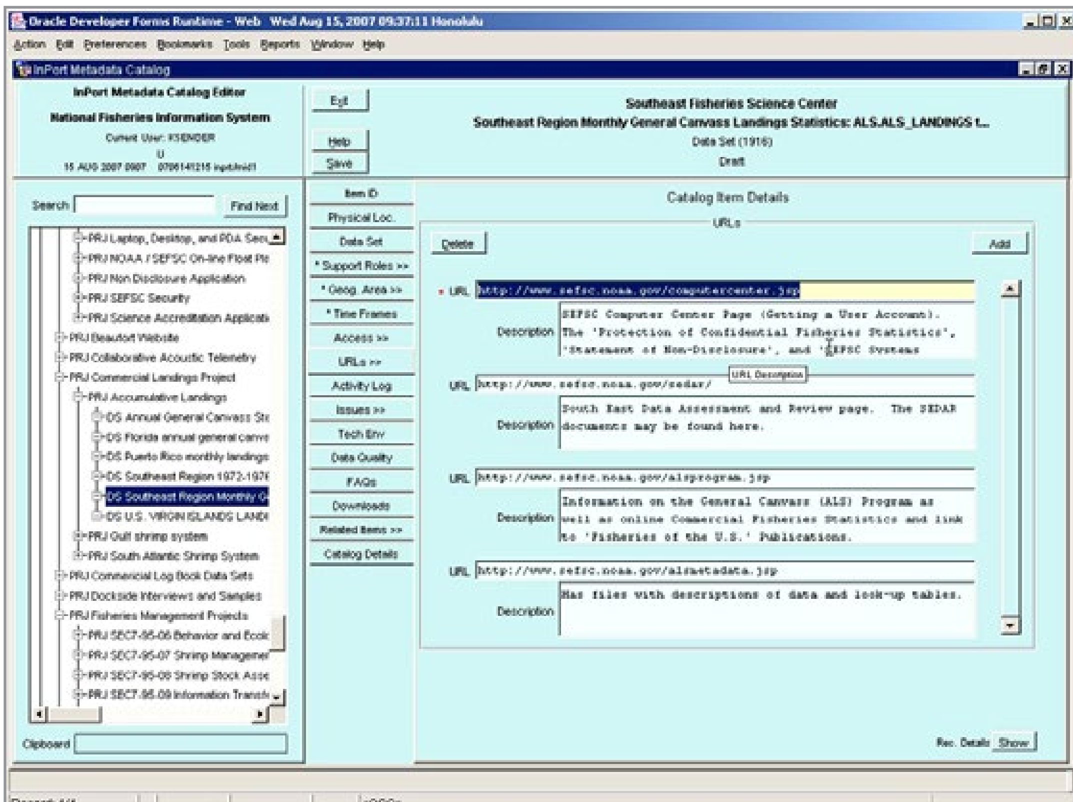
using the metadata after access is granted. Includes any metadata use constraints applied to ensure the protection and privacy of intellectual property, and any special restrictions or limitations on using the metadata.

- **Use Constraint** - Restriction and legal prerequisites for using the data set after access is granted. Includes any constraints applied to ensure the protection of privacy or intellectual property, and any special restrictions or limitations on using the data set.
- **Data Use Constraints** - conditions under which the data is provided.

URLs

Catalog Items can be further detailed by pointing to web sites or other internet resources. Each URL listed is a Universal Resource Locator on the WWW (e.g., a project web site, a report).

4.27 Catalog Editor - URLs Tab



Internet addresses which may include the path to a file or resource.

Screen Item Descriptions

- **URL** -The complete Universal Resource Locator (web address) needed to access the web resource
- **URL Description** - A detailed description of what a user can access via the URL

How to Create URLs

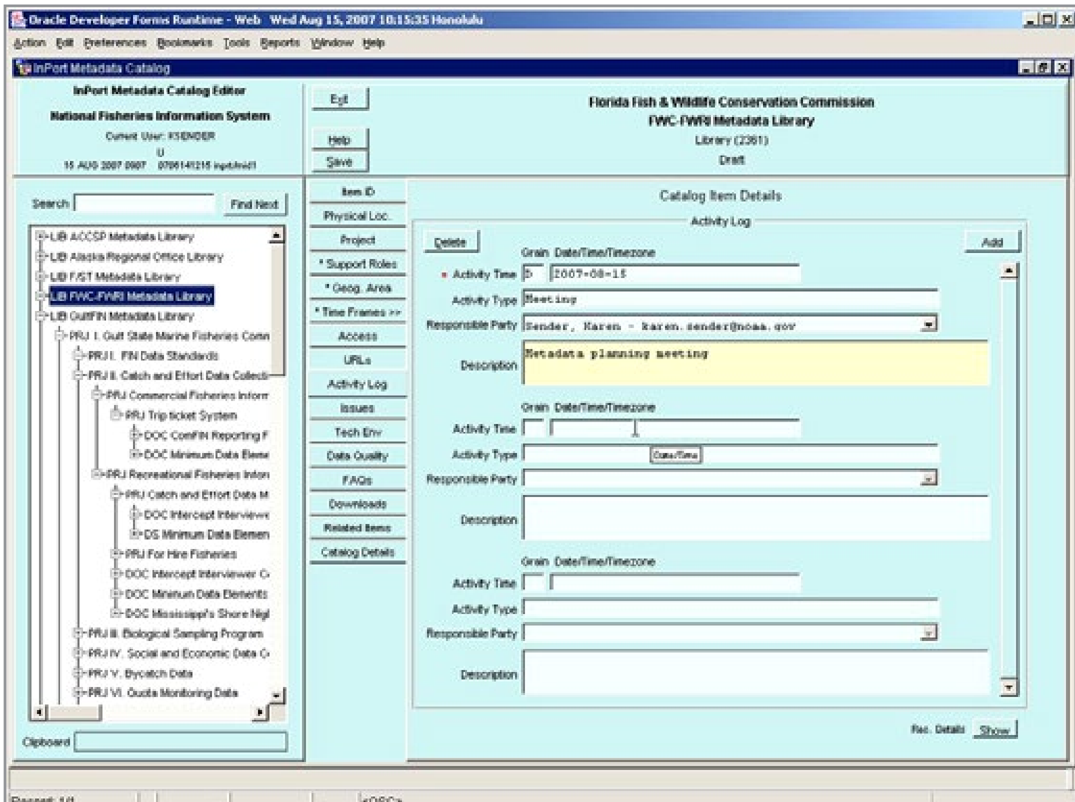
1. In the **CATALOG EDITOR**, select the catalog item that will be the parent for the URL.

2. Select the *URLs* tab and enter the **URL** and **URL Description** for each URL that refers to the selected catalog item.
3. Note that a catalog item may have any number of URLs. Use the *Add* button to create additional open records if needed.

Activity Log

Catalog Items can be further detailed by listing activities or events that effect or impact the catalog item.

4.28 Catalog Editor – Activity Log Tab



Log of activities and/or events pertinent to the selected catalog item.

Screen Item Descriptions

- **Date/Time Granularity** - Date/Time Granularity, e.g., Y(ear), M(onth), etc., allows the user to specify the smallest element in the data/time string. Y = Year, M = Month, D = Day, H = Hour, I = Minute, S = Second, F = Fractional second. When any level of time is specified, the user must specify the time zone. Example: including time zone: 1987-12-13 12:35 -10:00
- **Date/Time** - Activity Date/Time or Data/Time part appropriate for specified granularity
- **Activity/Event Type** - User supplied activity type
- **Person** - person responsible for this activity or event
- **Description** - text description of the activity or event
- **Details Button** - Click to show record creation and modification details of when and who created and last edited this record.

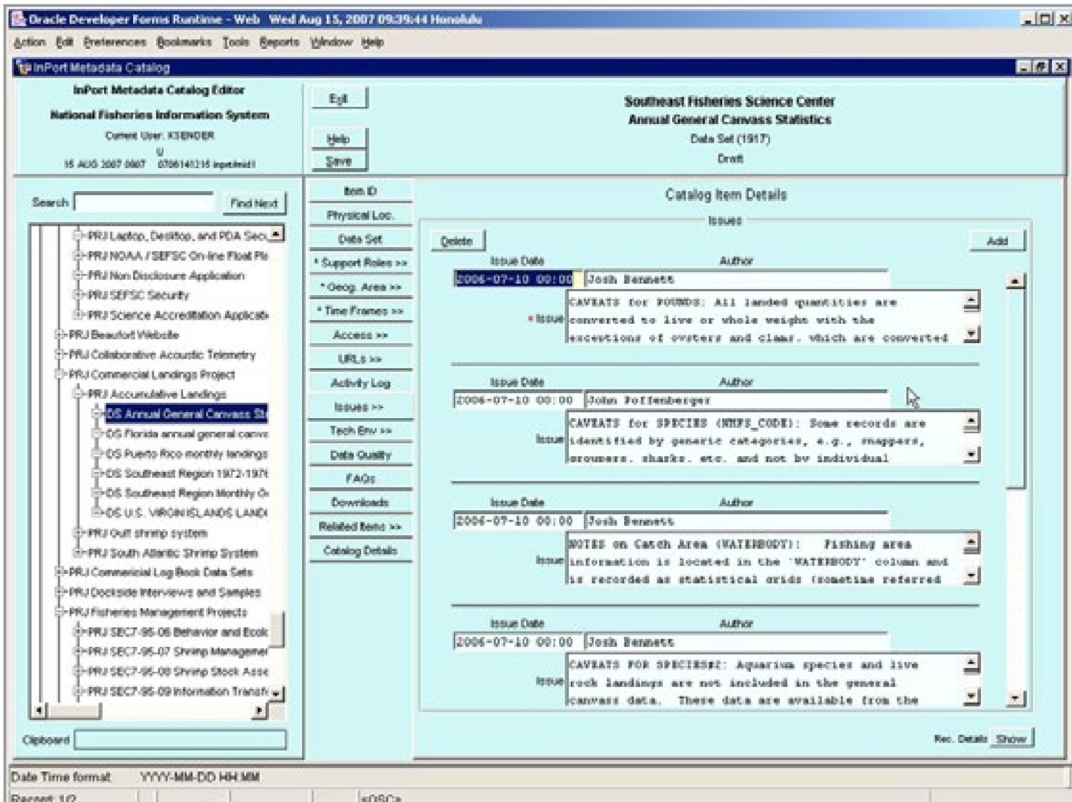
How to Create an Activity/Event

1. In the **CATALOG EDITOR**, select the catalog item that will be the parent for the Activity.
2. Select the *Activity Log* tab and enter the **activity/event information** for each event that refers to the selected catalog item.
3. Note that a catalog item may have any number of Activity/ Events. Use the *Add* button to create additional open records if needed.

Issues Module

Each catalog issue is significant as a problem, risk, or question about a catalog item. For example, an issue might be created if a question about a data set's start date exists.

4.29 Catalog Editor – Issues Tab



List of problems, issues, concerns related to the catalog item.

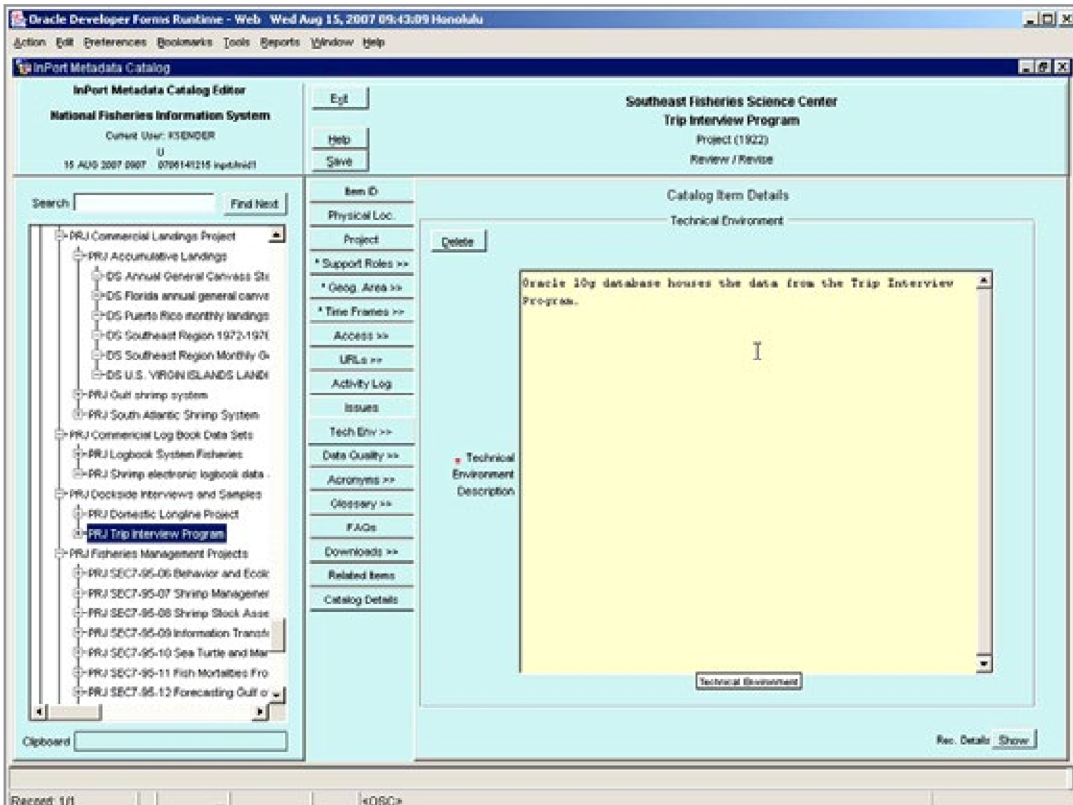
Screen Item Descriptions

- **Author** - The name for the person reporting the issue
- **Issue date** - The date that the issue occurred or became known
- **Issue** - A detailed description of the issue

Technical Environment Module

Description of the data set in the producer's processing environment, including items such as the name of the software (including version), the computer operating system, file name (including host-, path-, and filenames), and the data set size. (FGDC F1.13).

4.30 *Catalog Editor – Technical Environment Tab*



Description of the data set in the producer's processing environment, including details such as the name of the software (including version), the computer operating system, file name (including host, path, and filenames), and the data size.

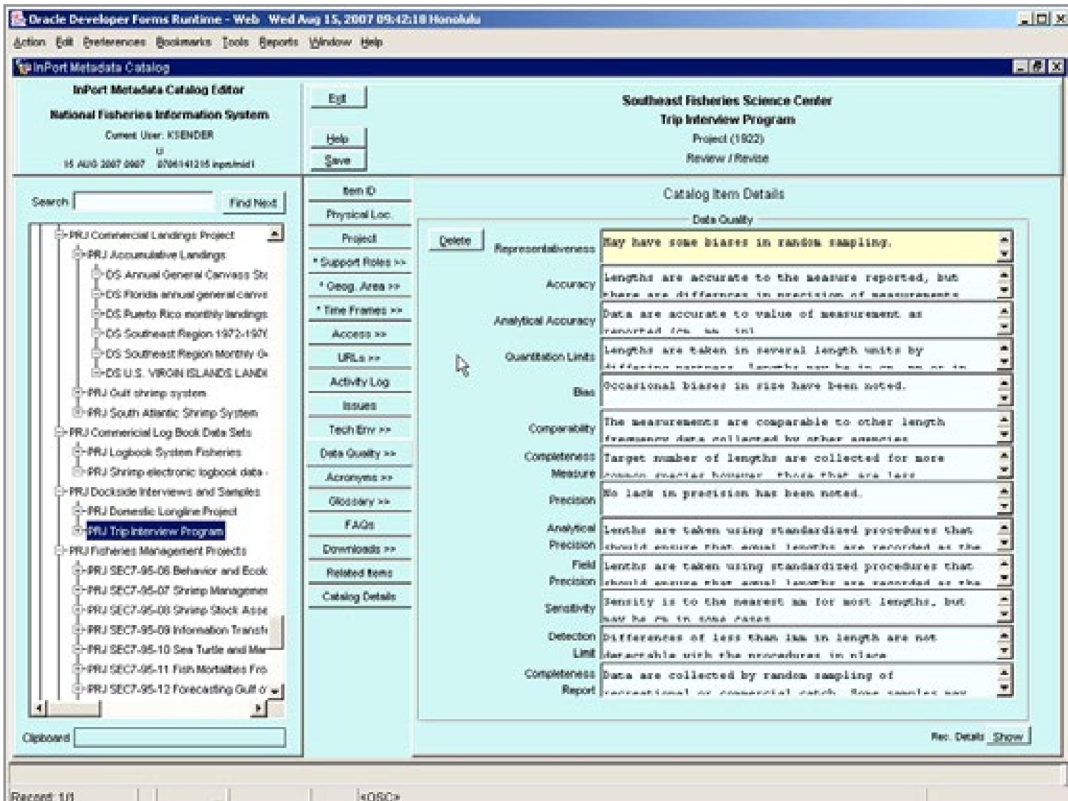
Screen Item Descriptions

- **Technical Environment** - A description of the catalog item's technical environment, including machine name, software, or other special considerations required to use or access the catalog item Access Information

Data Quality Module

Details of the quality of the data being documented. These fields are in direct support of the FGDC metadata standard.

4.31 Catalog Editor - Data Quality Tab



Details on usage constraints, completeness, and accuracy of the catalog item.

Screen Item Descriptions

- **Representativeness** - A description of the degree to which the data accurately and precisely represents the frequency distribution of a specific variable in the population of interest
- **Accuracy** - A description of what is known about the degree of agreement between an individual measurement (or the central tendency of a number of measurements) to the true value, including random (precision) and systematic (bias) error associated with all aspects of a measurement system
- **Analytical Accuracy** - A description of the closeness of the values derived from the analytical measurement to the true value
- **Quantitation Limits Measure** - The measure of the quantities of a target variable that can be quantified with the certainty required by the data user
- **Bias** - (Or bias number). A discussion of any systematic or persistent distortions in a measurement process that cause errors in one direction.
- **Comparability** - A description of the confidence that data sets contributing to a common analysis or interpolation were similar
- **Completeness Measure** - The measure that describes the amount of usable data obtained compared to the planned amount.
- **Precision** - A description of what is known about the degree of mutual agreement among individual measurements of the same property under prescribed similar conditions
- **Analytical Precision Measure** - A measure of agreement among individual measurements of the same property in duplicate labora-

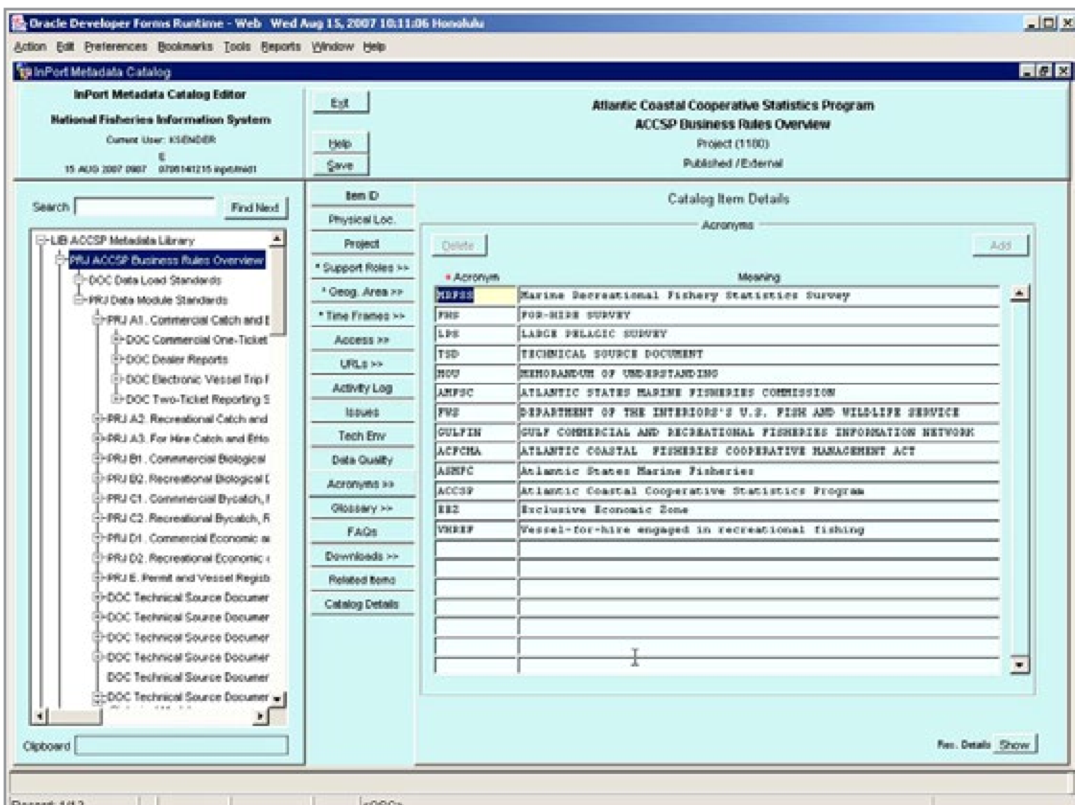
tory samples

- **Field Precision Measure** - A measure of agreement among measurements of the same property in samples collocated or duplicated in the field under prescribed conditions
- **Sensitivity Measure** - The measure of the capability of a method or instrument to discriminate between measurement responses representing different levels of a variable of interest
- **Detection Limit Measure** - The measure that describes the quantity of a sample below which the sample analysis equipment will not detect the analyte accurately
- **Completeness Report** - Information about omissions, selection criteria, generalization, definitions used, and other rules used to derive the data set.
- **Data Use Constraints** - Text commentary on any issues in the use of a given data set, including explicit description of any limitations or constraints on use of the data

Acronyms

Acronyms used in the context of the project being documented. Acronyms are restricted to the project level.

4.32 Catalog Editor - Acronyms



An abbreviation used in the context of a catalog item.

Screen Item Descriptions

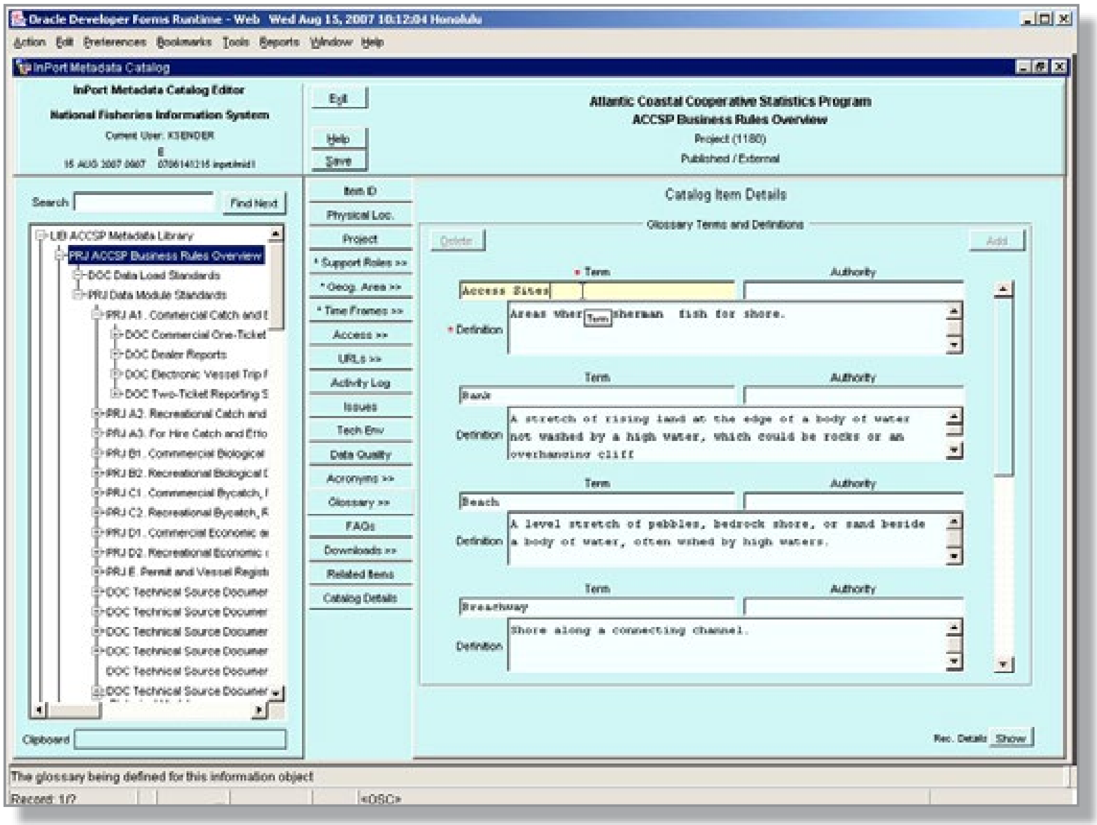
- **Acronym** - A shortened name
- **Meaning** - Text definition of the abbreviated acronym
- **Acronym Type** - Valid acronym types are Abbreviation, Short Name,

Long Name, Display Name. (This field is not currently used.)

Glossary Terms

Each glossary term is significant as a definition of a word or phrase in the context of the catalog item.

4.33 Catalog Editor - Glossary Terms



List of terms and definitions specific to the catalog item.

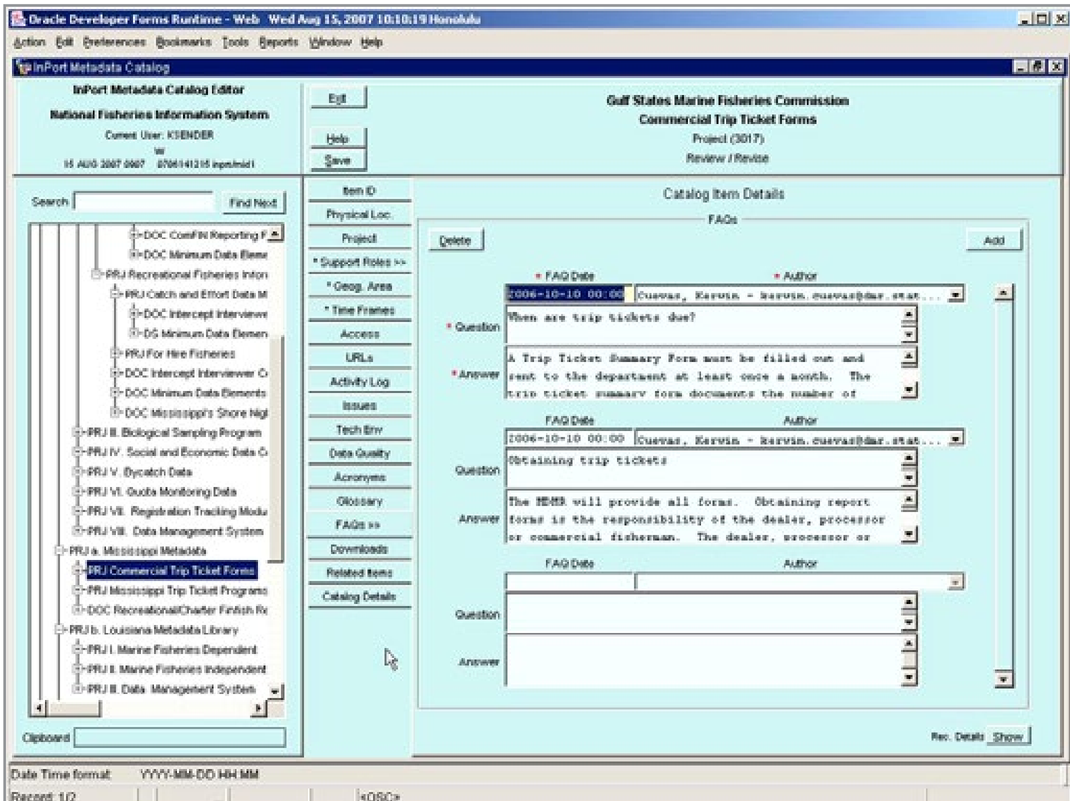
Screen Item Descriptions

- **Term** - The glossary word or phrase being defined for this catalog item
- **Authority** - The authoritative source of the glossary term's definition
- **Definition** - The definition of the glossary term within the context of the catalog item

FAQs

Each FAQ represents a frequently asked question and answer pair about a catalog item (e.g., project, data set).

4.34 Catalog Editor – FAQs Tab



List of questions and answers that have proven helpful to the understanding and use of the catalog item.

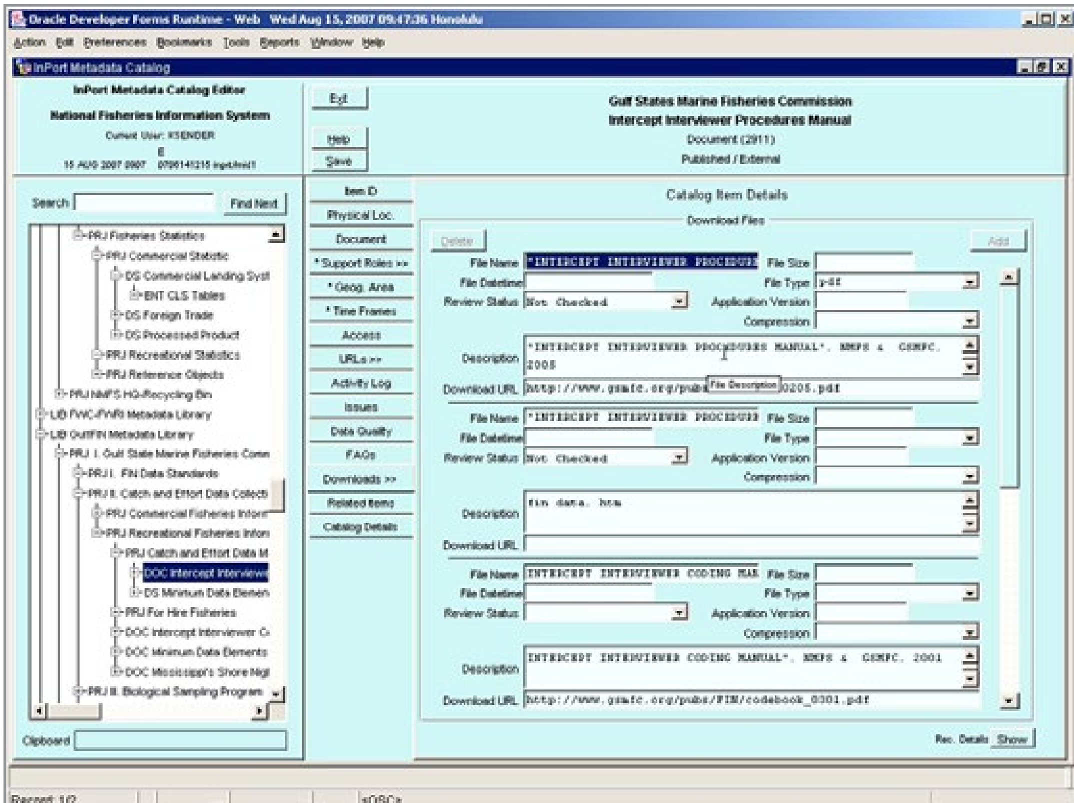
Screen Item Descriptions

- **FAQ Datetime** - The date of the FAQ question and answer. Defaults to system date.
- **Author** - The author of the FAQ question
- **FAQ Question** - The FAQ question related to the InPort catalog item
- **FAQ Answer** - The answer to the FAQ question

Downloads

Each download is relevant as a URL to a downloadable file.

4.35 Catalog Editor – Downloads Tab



List of available downloadable files, images, and documents for the catalog item with details and links for obtaining them.

Screen Item Descriptions

- **File Name** - The name of the file to be downloaded. Include the full path and file extension if necessary.
- **File Datetime** - Date the file was created
- **Review Status** - A description of the level of review of the file to be downloaded. Valid entries include: Not Checked, Metadata Only Checked, File Checked for Viruses, File Checked for Inappropriate Content, File Checked for Viruses and Inappropriate Content
- **File Size** - In kilobytes, the size of the file to be downloaded
- **File Type** - A description of the type of file that is available for download. Valid types include (but are not limited to): PDF, ZIP, HTM, DOC, TAR, WK1
- **Compression Status** - The technology used to compress data in the file. Valid entries include: Uncompressed, Zip, GZIP, Z, TAR, GTAR, Unknown
- **File Description** - A brief description of the character and content of the file being downloaded
- **Download URL** - The complete Universal Resource Locator (web address) needed to access the file
- **Connect Protocol** - Column not current used
- **File Path** - Column not currently used

Related Items

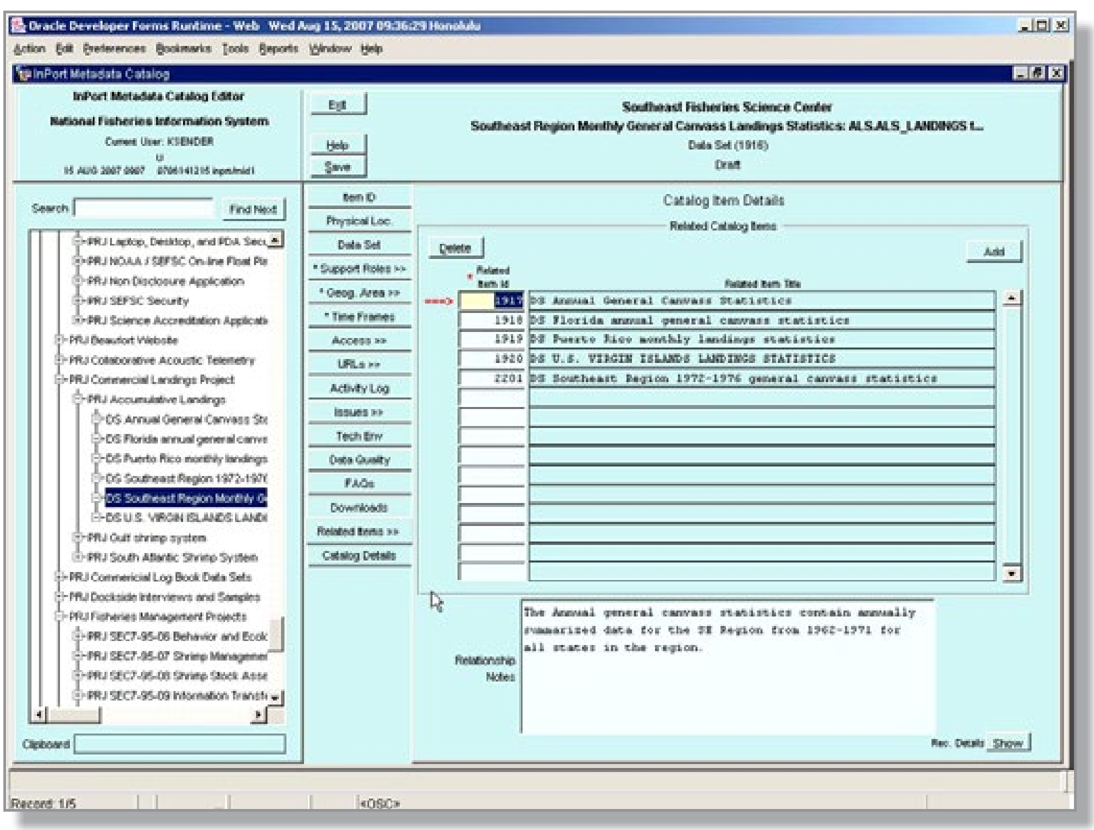
It is frequently important to create relationships between catalog items that reside in different projects or libraries. For example, a single data quality document can be referenced by several projects, or a Longline Logbook data set might be referenced by a Longline Observer data set. InPort allows users to create these user-defined relationships between their catalog items and any published catalog items that have a **Share Level (see below),** that makes them available for external linking. Note that the Share Level is set on the *Catalog Details* tab.

Using Related Items is a powerful way to create virtual metadata folders of related data sets. The user could create a Project catalog item called, for example, Highly Migratory Species Data Sets, and then create Related Item links to all the available data sets that are relevant to that topic.

There are three possible share levels:

	Share Level	Description
1	Project	Any item in the same Project may link to this item (this is the default share level)
2	Library	Any item in the same Library may link to this item, once this item is published (internal or external)
3	Public	Any item in any Library may link to this item, once this item is published (internal or external)

4.36 Catalog Editor – Related Items Tab



User-defined relationship between two Catalog Items.

Screen Item Descriptions

- **Related Item ID** - The InPort ID number of the related item
- **Related Item Title** - InPort Title of the related item. Non-enterable field. Field is populated when Related Item ID is entered.
- **Relationship Notes** - Helpful notes describing the relationship of this item to the current item

How to Create Related Items

1. Using either the **CATALOG EDITOR** or the **INPORT SEARCH**, locate the catalog item to which you want to link; obtain the Catalog Item ID. (In the **CATALOG EDITOR** the **Item ID** is found on the *Catalog Details* tab and in the web search it is found in the *Catalog Details* section at the bottom of the *Catalog Item Summary* page.)
2. In the **CATALOG EDITOR**, select the catalog item that you want to link from.
3. Select the *Related Items* tab and enter the **Item ID** in the next available record.
4. In the **Relationship Notes** field, describe the details of the new relationship.

5. Catalog Publishing

Catalog Publishing Workflow Overview

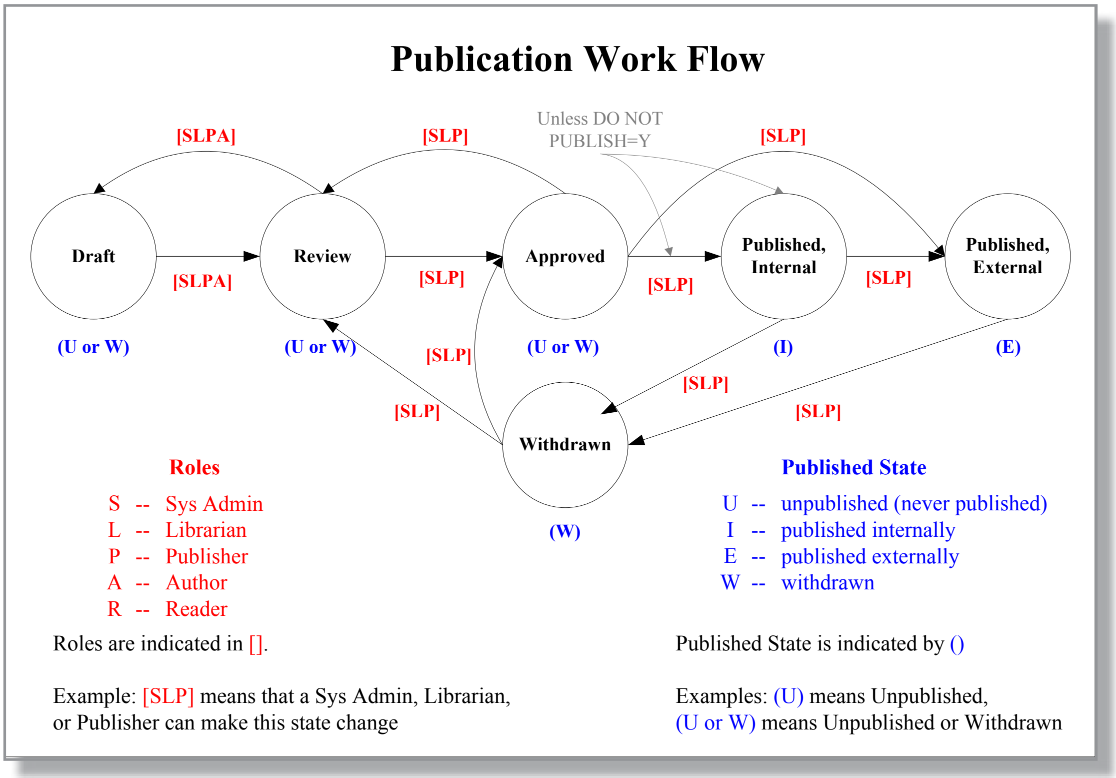
In InPort, the proces of "publishing" refers to making metadata available to users or the public on the InPort web site. InPort is currently configured with two Publication levels - *Public/External* and *Restricted/Internal* where only those with InPort user accounts may log into the InPort web site to view the metadata.

Each Catalog Item (e.g., a data table or data entity) will be in one of six publication workflow control states. The workflow control state determines which operations may be performed on the catalog item and which InPort User Roles may perform those operations. For example, the *Published Externally* state means that users (NOAA and public) can search for and view the catalog item. The *Draft* state means that the catalog item is viewable only by users who have been granted access to view or edit that catalog item.

Publication Workflow Control States

- **Draft** - Initial state where most editing occurs
- **Review/Revise** - Metadata is entered and ready for review and final editing within this control state
- **Approved** - Metadata has been reviewed and is ready for publication. Metadata can no longer be edited without being taken back to Review/Revise state
- **Published-Internal** - Metadata is viewable by registered InPort users. Login required
- **Published-External** - Metadata is viewable by the public. No login required
- **Withdrawn** - Metadata was previously published, internally or externally, but has been withdrawn

5.1 Allowable Catalog Workflow Control State Changes



Publication Workflow Rules for Individual Items

5.2 Workflow Control State Rules for an Individual Catalog Item

Control State	Description / Primary Activity	Allowable Operations	Minimum Required Role	Next Possible Control States
Draft (Edit)	Entry of metadata	Add Child Items Update Delete Read Move Change State	Author Author Author Reader Author Author	Review/Revise
Review/Revise (Review)	Review and revision of metadata	Add Child Update Delete Read Move Change State	Author Publisher Publisher Reader Publisher Publisher	Draft Approved
Approved (Approve)	Approved for publication	Add Child Items Read Change State	Author Reader Publisher	Published/Internal Published/External Review/Revise
Published/Internal (Publish Internally)	Metadata is made available to internal - registered InPort - users who can search, review and comment on metadata	Add Child Items Read Change State	Author Reader Publisher	Withdrawn Publishe/External
Published/External (Publish Externally)	Metadata is made available to the public who can search, review and comment on metadata	Add Child Items Read Change State	Author Reader Publisher	Withdrawn
Withdrawn (Withdraw)	Metadata is pulled from publication	Add Child Items Read Change State	Author Reader Publisher	Review/Revise Approved

Workflow Rules within a Catalog Hierarchy

Under most conditions, users can change the workflow control state for an item and all its child items. *The major exception to this is that advancing Catalog Items from Review/Revise to Approved is only done on an item by item basis.* This is to ensure that every published Catalog Item has been digitally signed off by a Publisher that the metadata has been reviewed and Approved.

Draft to Review/Revise

- When a Catalog Item's control state is being changed from Draft to Review/Revise, the user has the option to change the control state of all child catalog items that are also in Draft to Review/Revise
- If the user chooses to update the child item's control state, all children that were not in Draft will remain in their current control state.

Review/Revise to Approved

- Each Catalog Item must be Approved individually. This restriction is to ensure that each and every catalog item is reviewed and approved by the Publisher.

- However, if the Catalog Item has child items that are in Withdrawn state - thus had been previously Published and could never have been modified - the user can choose to update any child items that are in Withdrawn back to Approved.

Approved to Published (internal or external)

- When a Catalog Item's control state is being changed from Approved to either Published-Internal or Published-External, the user has the option to change the control state of all child catalog items that are already in Approved to the same new Published state.
- If the user chooses to update the child item's control state, all children that have Do Not Publish checked will not be moved to Published.
- If the user chooses to update the child item's control state, all children that were not in Approved will remain in their current control state.

Published-Internal to Published-External

- When a Catalog Item's control state is being changed from Published-Internal to Published-External, the user has the option to change the control state of all child catalog items that are already in Published-Internal to the same new Published-External state.

Published (internal or external) to Withdrawn

- When a Catalog Item's control state is being changed from Published-Internal or Published-External to Withdrawn, all child items that have been Published-Internal or Published-External will also be withdrawn.

Withdrawn to Approved

- When a Catalog Item's control state is being changed from Withdrawn to Approved, the user has the option to change the control state of all child items that are in Withdrawn to Approved.

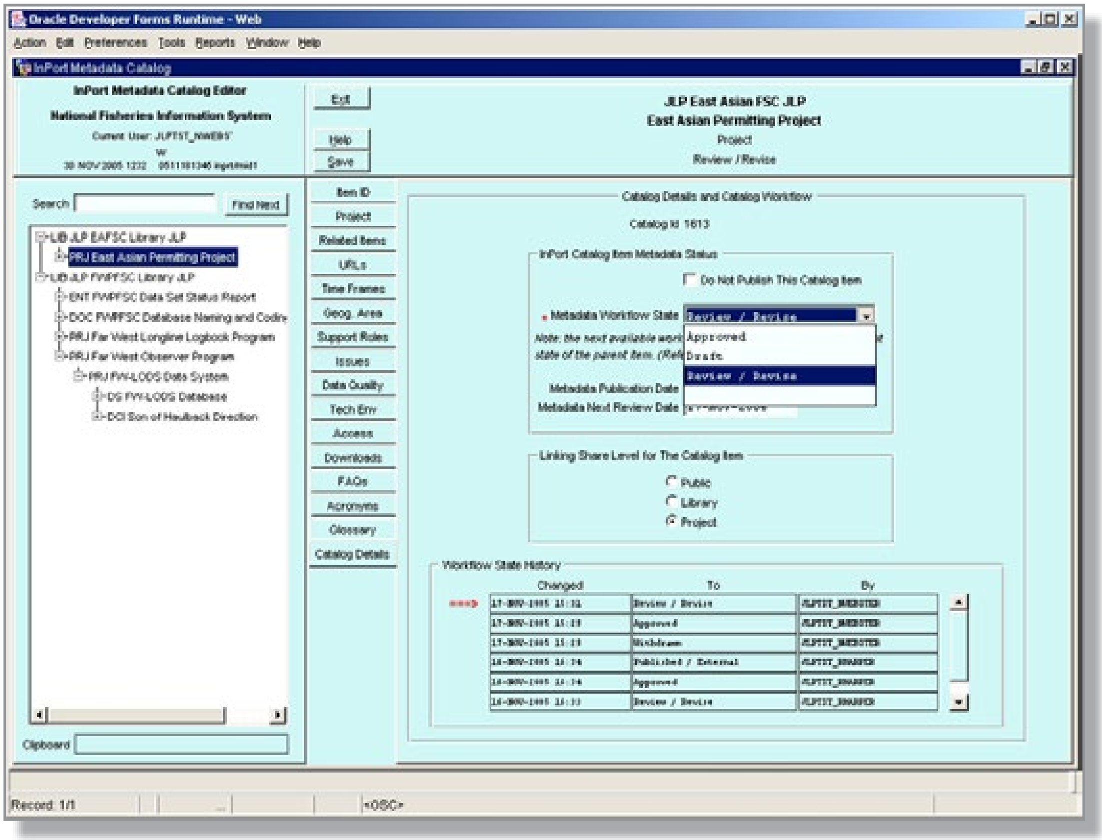
Approved to Review/Revise

- When a Catalog Item's control state is being changed from Approved to Review/Revise, the user has the option to change the control state of all child items that are in Approved to Review/Revise. **CAUTION:** *This action will rescind approval of all child items.* To *undo* this change, each child item must be individually Approved.

Withdrawn to Review/Revise

- When a Catalog Item's control state is being changed from Withdrawn to Review/Revise, the user has the option to change the control state of all child items that are in Withdrawn to Review/Revise. **CAUTION:** *This action will rescind previous approval of all child items.* To *undo* this change, each child item must be individually Approved in order to re-publish.

5.3 Changing Catalog Item Workflow State in the Catalog Editor

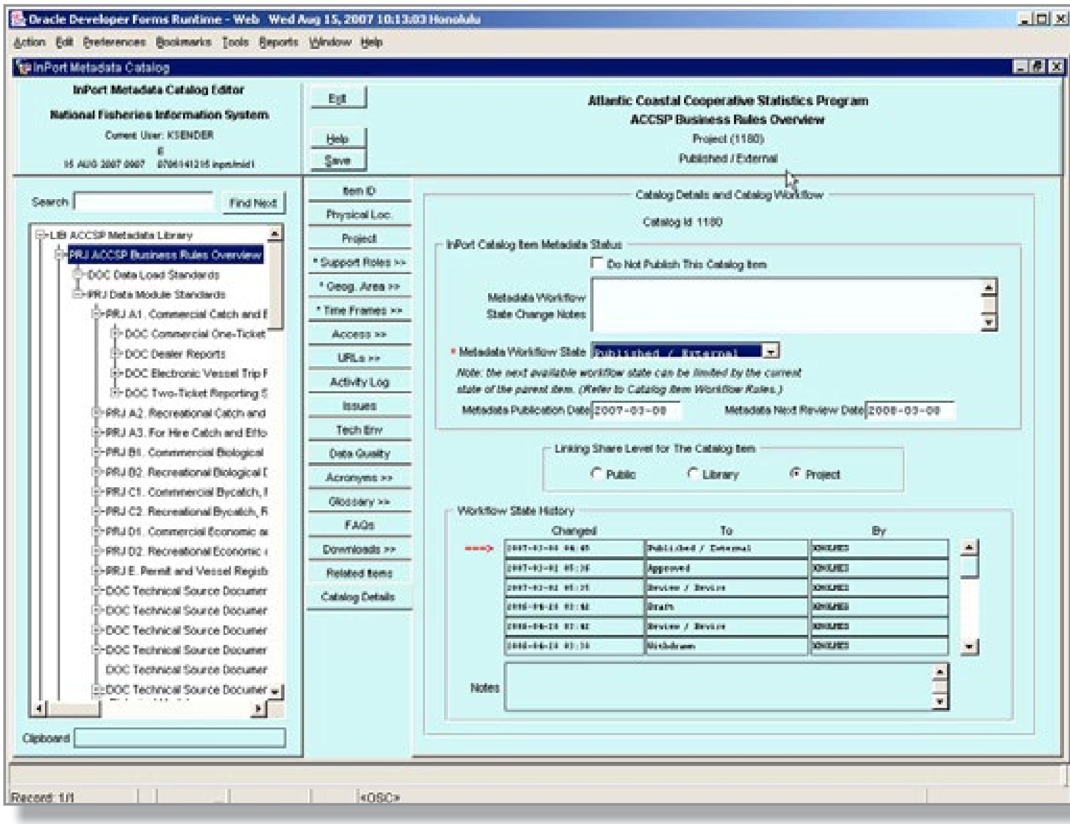


Workflow State can be changed from the Catalog Details tab of the Catalog Editor using the Metadata Workflow State pop-list. The available states listed will be controlled both by the current state of the catalog item and the InPort User Role of the current user per the Catalog Workflow Control State Rules table.

How to Change a Catalog Item's Workflow Control State

1. In the Catalog Editor, select the catalog item in the Navigator pane whose control state is to be changed.
2. Select the Catalog Details tab.
3. Select the desired workflow control state from the Metadata Workflow State pop-list. Note that the available choices in this list is dependent upon the role of the user and the current workflow state of the selected catalog item. Refer to the Workflow Control States table for details on allowable operations and workflow control states.

5.4 Catalog Editor – Catalog Details Tab



The Catalog Details tab controls the publication workflow process and additionally allows the user to specify what projects outside the selected catalog item's top-level project can create related links to it (Linking Share Level).

Screen Item Descriptions

- **Publication Exclusion Flag** - Exclude this catalog item and its children from publication, Y/N?
- **Metadata Record Control State** - Current metadata workflow state
- **Record Modified Datetime** - Date and time of last record update
- **Metadata Review Date** - The date this (metadata) item should be reviewed next
- **Linking Share Level** (who can link to this item) - Scope of use for the catalog item: Public -- any published item in any of the catalog Libraries; Library -- any published item in the current Library or Project -- any published item in the current Project

How to Edit a Published Catalog Item

1. In the Catalog Editor, select the Catalog Item that needs to be edited.
2. From the Catalog Details tab, change the Metadata Control State to Withdrawn. Note that all published child catalog items will also be changed to Withdrawn.
3. Change the selected Catalog Item from Withdrawn to Review/Revise, remembering to NOT update any child items to Review/Revise.
4. Make any needed corrections or additions to the selected Catalog Item.

5. Change the selected item's control state to Approved and choose to update any Withdrawn child items to Approved.
6. Change the selected item's control state to Published (internal or external, as needed) and choose to update all Approved child items to the same new state.

6. Catalog Searching

Internal vs. External Publication

Catalog Items that have been Published Internally (that is, published only to the InPort user community) can be searched through the InPort web site after the InPort user has logged into InPort. Once logged in, the user will be able to search the InPort Catalog and retrieve any items that are either Published-Internal or Published External

Catalog Items that have been Published Externally can be searched by anyone. If an InPort user does not explicitly log into the web site, any search will only be made against Catalog Items that have been Published Externally.

Catalog Search Process

- User enters a text string in the Search text box and clicks the Search button
- Search Results Page is displayed showing all published Catalog Items that contain the text string in the item's Title, Abstract, Supplemental Information, or Keyword fields
- User clicks on a Catalog Item link of interest
- The selected item's Catalog Item Summary Page displayed
- User clicks on the Full Details link to display the selected item's Catalog Item Details Page
- User can click on any parent, child, and/or related item links on the Catalog Item Details page (Catalog Drill Around), to get more information about items that are related to the currently selected Catalog Item

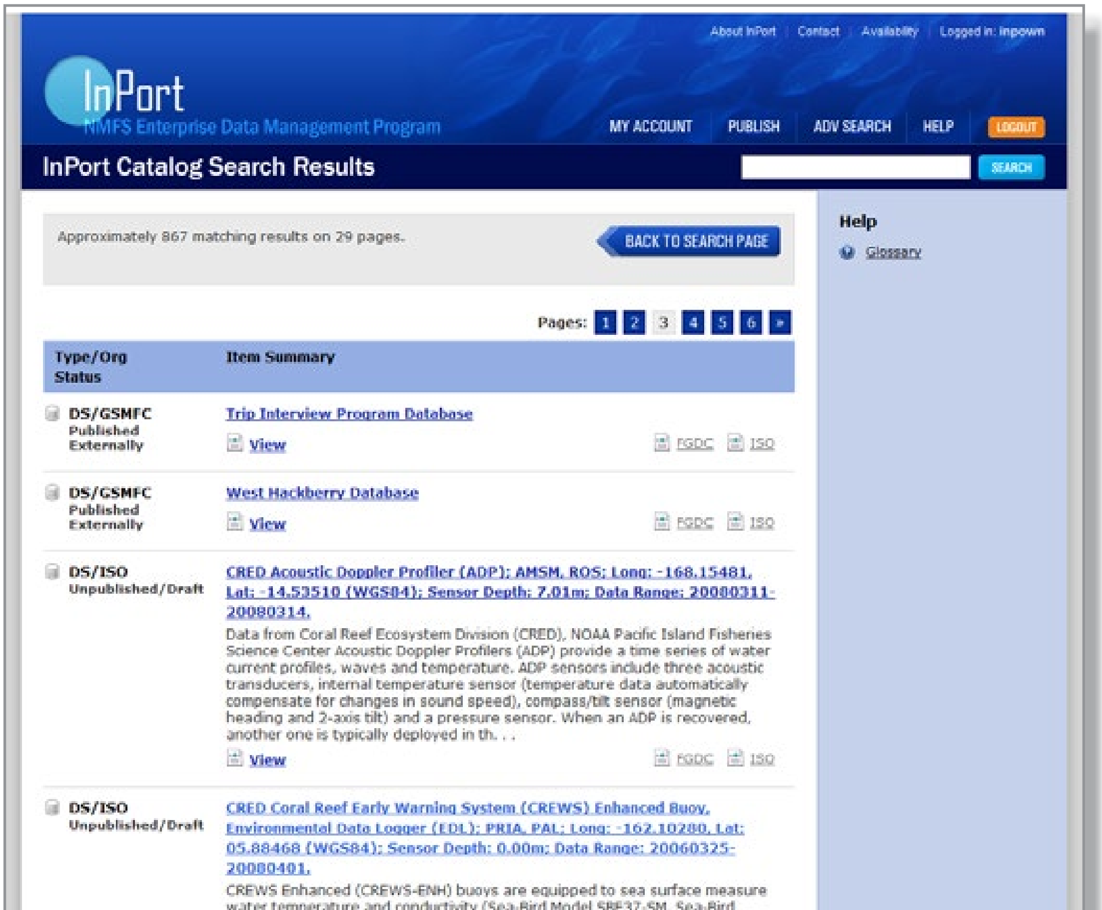
Text string search

6.1 InPort Home Page Search Box

Enter a text string and click the search button to return a list of items where the search string is found in the catalog item's Title, Abstract, Supplemental Information, or Keyword fields.

Search Results Page

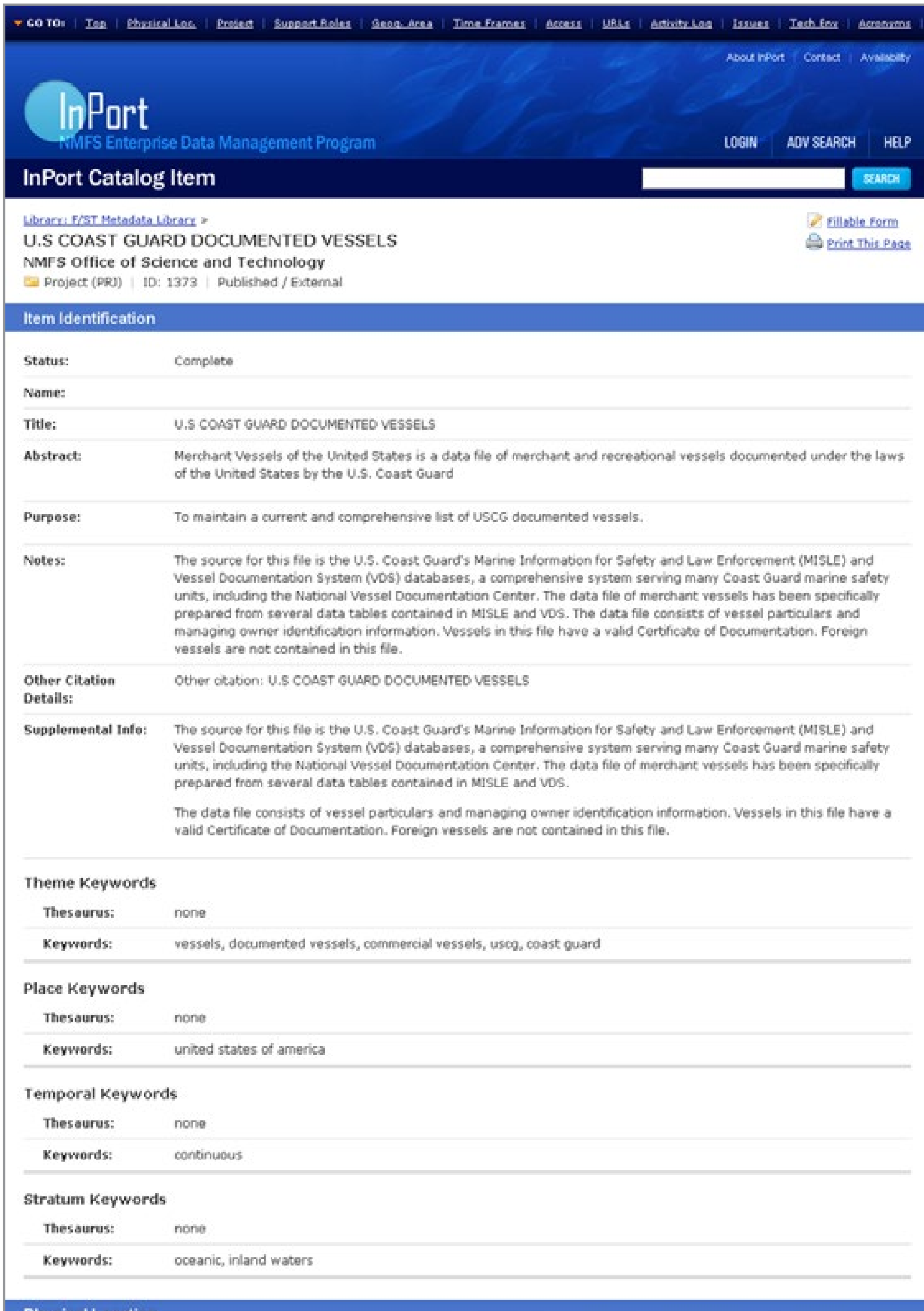
6.2 Catalog Search Results Page



The Catalog Search Results page will list all of the published items that match the user's search criteria. Click on one of the displayed links to drill down to the selected catalog item. The user may use the search box at the bottom of the Search Results page to do a new search.

Catalog Item Details

6.3 InPort Catalog Item Details Page



GO TO: | Top | Physical Loc. | Project | Support Roles | Geog. Area | Time Frames | Access | URLs | Activity Log | Issues | Tech Env | Acronyms |

About InPort | Contact | Availability

InPort
NMFS Enterprise Data Management Program

LOGIN | ADV SEARCH | HELP

InPort Catalog Item

SEARCH

Library: F/ST Metadata Library >

U.S COAST GUARD DOCUMENTED VESSELS

NMFS Office of Science and Technology

Project (PRJ) | ID: 1373 | Published / External

Fillable Form

Print This Page

Item Identification

Status:	Complete
Name:	
Title:	U.S COAST GUARD DOCUMENTED VESSELS
Abstract:	Merchant Vessels of the United States is a data file of merchant and recreational vessels documented under the laws of the United States by the U.S. Coast Guard
Purpose:	To maintain a current and comprehensive list of USCG documented vessels.
Notes:	The source for this file is the U.S. Coast Guard's Marine Information for Safety and Law Enforcement (MISLE) and Vessel Documentation System (VDS) databases, a comprehensive system serving many Coast Guard marine safety units, including the National Vessel Documentation Center. The data file of merchant vessels has been specifically prepared from several data tables contained in MISLE and VDS. The data file consists of vessel particulars and managing owner identification information. Vessels in this file have a valid Certificate of Documentation. Foreign vessels are not contained in this file.
Other Citation Details:	Other citation: U.S COAST GUARD DOCUMENTED VESSELS
Supplemental Info:	The source for this file is the U.S. Coast Guard's Marine Information for Safety and Law Enforcement (MISLE) and Vessel Documentation System (VDS) databases, a comprehensive system serving many Coast Guard marine safety units, including the National Vessel Documentation Center. The data file of merchant vessels has been specifically prepared from several data tables contained in MISLE and VDS. The data file consists of vessel particulars and managing owner identification information. Vessels in this file have a valid Certificate of Documentation. Foreign vessels are not contained in this file.

Theme Keywords

Thesaurus:	none
Keywords:	vessels, documented vessels, commercial vessels, uscg, coast guard

Place Keywords

Thesaurus:	none
Keywords:	united states of america

Temporal Keywords

Thesaurus:	none
Keywords:	continuous

Stratum Keywords

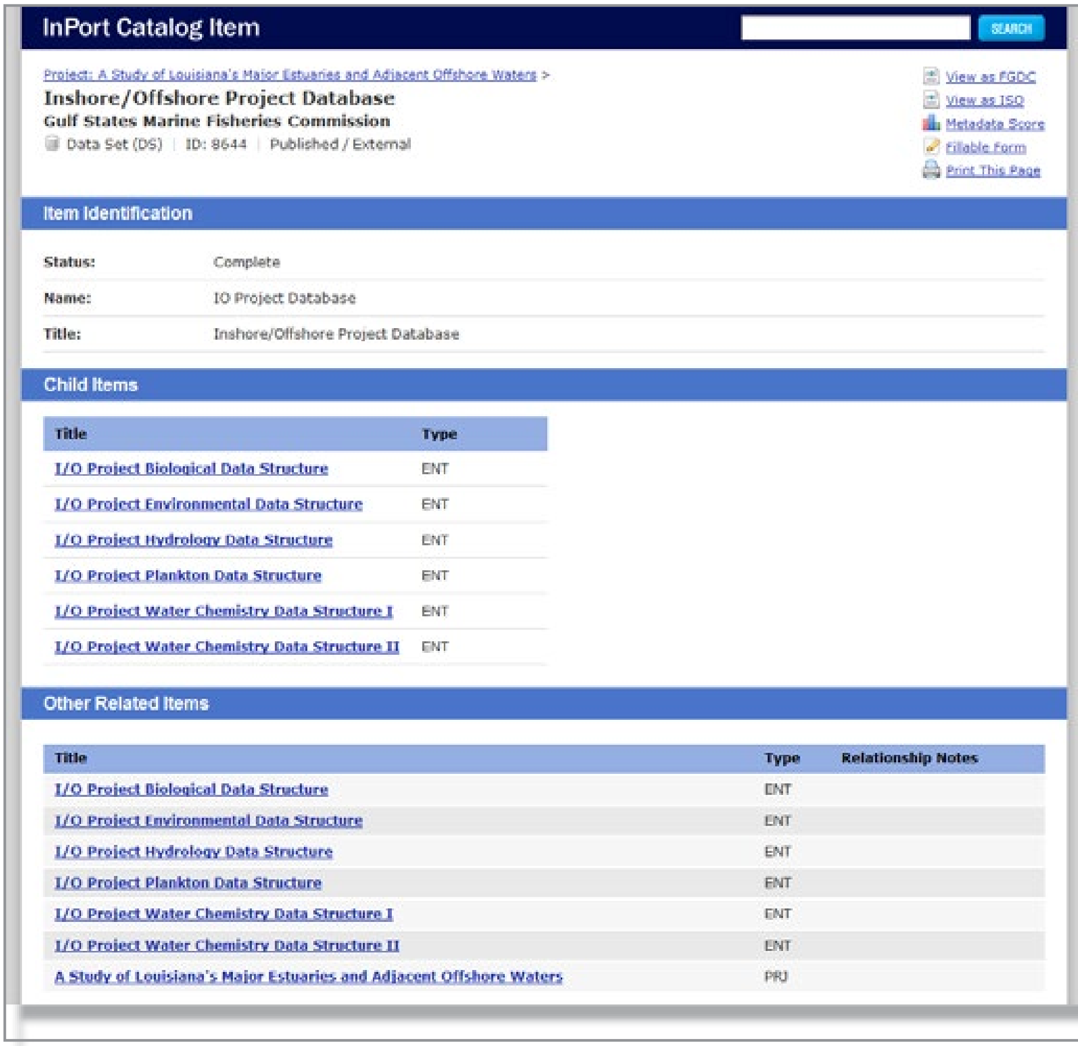
Thesaurus:	none
Keywords:	oceanic, inland waters

Physical Location

Clicking on a catalog item link in the Search Results page will display the details for this catalog item with all its published metadata. Use the Quick Links in the navigation bar on the left of the page to navigate to specific detail blocks.

Catalog Hierarchy Drill Around

6.4 InPort Catalog Items Drill Around


InPort Catalog Item

SEARCH

Project: A Study of Louisiana's Major Estuaries and Adjacent Offshore Waters >

Inshore/Offshore Project Database

Gulf States Marine Fisheries Commission

Data Set (DS) | ID: 8644 | Published / External

View as FGDC
View as ISO
Metadata Score
Fillable Form
Print This Page

Item Identification

Status:	Complete
Name:	IO Project Database
Title:	Inshore/Offshore Project Database

Child Items

Title	Type
I/O Project Biological Data Structure	ENT
I/O Project Environmental Data Structure	ENT
I/O Project Hydrology Data Structure	ENT
I/O Project Plankton Data Structure	ENT
I/O Project Water Chemistry Data Structure I	ENT
I/O Project Water Chemistry Data Structure II	ENT

Other Related Items

Title	Type	Relationship Notes
I/O Project Biological Data Structure	ENT	
I/O Project Environmental Data Structure	ENT	
I/O Project Hydrology Data Structure	ENT	
I/O Project Plankton Data Structure	ENT	
I/O Project Water Chemistry Data Structure I	ENT	
I/O Project Water Chemistry Data Structure II	ENT	
A Study of Louisiana's Major Estuaries and Adjacent Offshore Waters	PRJ	

The user can use drill up and down the catalog hierarchy by using the parent and child item links on the Catalog Item Details page. The user can also drill over to Related Catalog Items if any are defined for the selected catalog item.

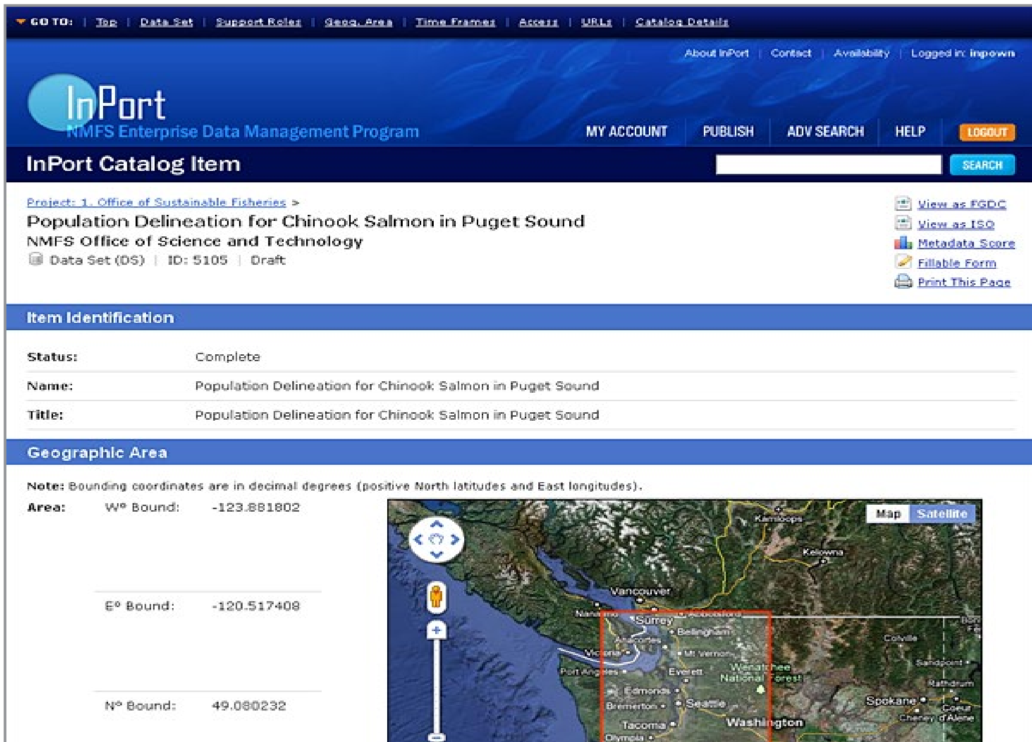
Catalog Item Views

The InPort web application allows you to view catalog items in several different formats.

Default Web View

The default web view displays the basic information for each Catalog Item, as well as the available Detail Modules for that type of Item.

6.5 Catalog Item – Default Web View



Example of the Default HTML view.

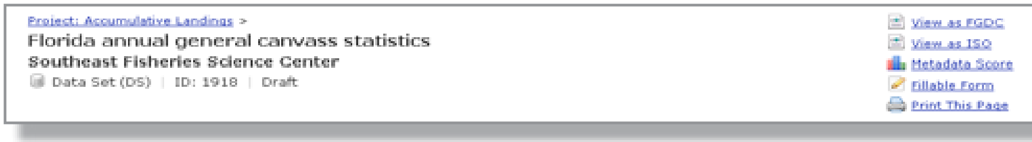
A page scrolling navigation bar is available at the top of the page for quick access to the various detail modules.

It is possible to drill up and down the Catalog Hierarchy, by clicking on the parent link (just above the title of the Item) to go up the hierarchy, or clicking on any of the child item links in the Related Items Detail Module.

InPort also provides alternate views of the Catalog Item, available via links at the top right of the page:

- FGDC View (Data Sets only)
- ISO View (Data Sets only)
- Metadata Score View (Data Sets only)
- Fillable Form View
- Printable View

6.6 Catalog Item – Alternate View Links

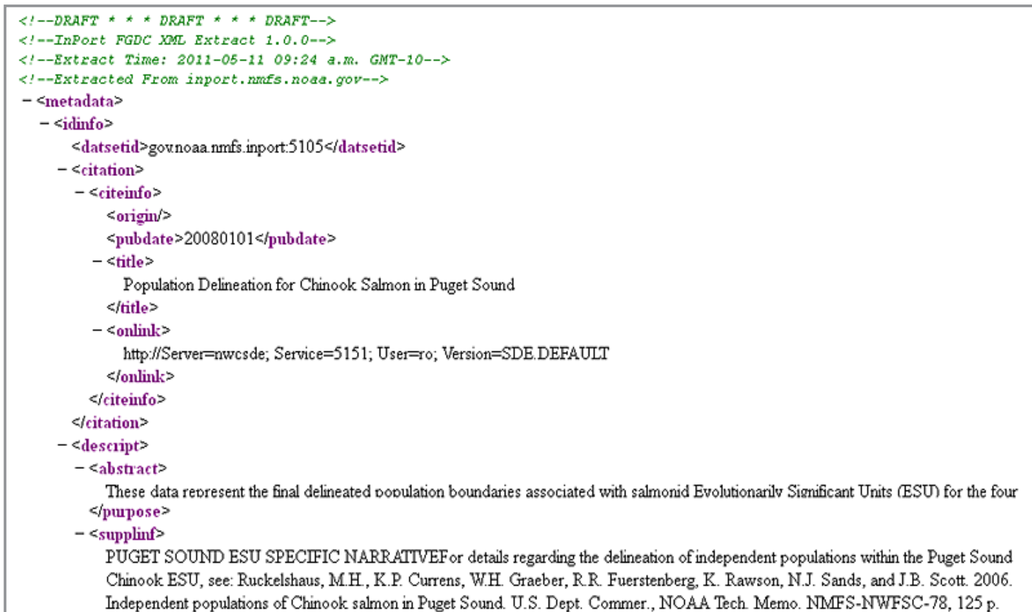


Alternate views are accessible via links at the top right of the default web view.

FGDC View

The FGDC View displays Catalog Items as XML metadata records generated according to the FGDC Metadata Standard (FGDC-STD-001-1998).

6.7 Catalog Item - FGDC View



Example of the FGDC view in a browser (Firefox).

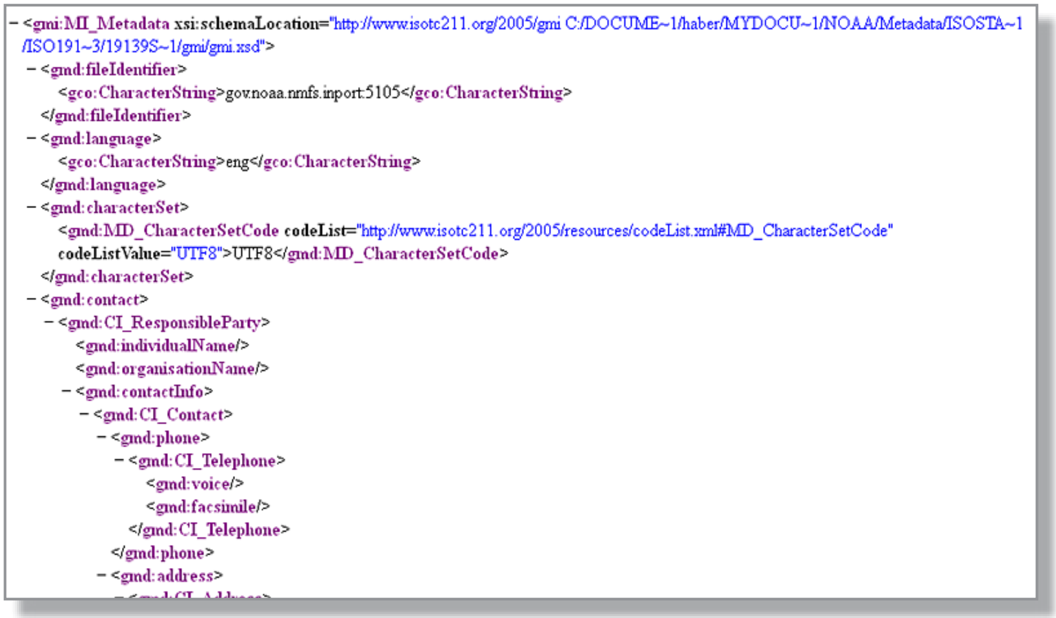
Note that not all fields in InPort have an equivalent counterpart in FGDC; therefore, the generated FGDC file should not be considered a complete representation of the InPort Catalog Item.

The output is a standard XML file, which can be rendered with the browser's XML viewer, or saved to the hard drive for use with other XML tools.

ISO View

The ISO View displays Catalog Items as XML metadata records generated according to the ISO 19139 Geographic Information Metadata XML Schema Implementation.

6.8 Catalog Item - ISO View



```
- <gmi:MI_Metadata xsi:schemaLocation="http://www.isotc211.org/2005/gmi C:/DOCUME~1/haber/MYDOCU~1/NOAA/Metadata/ISOSTA~1
  /ISO191~3/19139S~1/gmi/gmi.xsd">
  - <gmd:fileIdentifier>
      <gco:CharacterString>gov.noaa.nmfs.inport:5105</gco:CharacterString>
    </gmd:fileIdentifier>
  - <gmd:language>
      <gco:CharacterString>eng</gco:CharacterString>
    </gmd:language>
  - <gmd:characterSet>
      <gmd:MD_CharacterSetCode codeList="http://www.isotc211.org/2005/resources/codeList.xml#MD_CharacterSetCode"
      codeListValue="UTF8">UTF8</gmd:MD_CharacterSetCode>
    </gmd:characterSet>
  - <gmd:contact>
    - <gmd:CI_ResponsibleParty>
        <gmd:individualName/>
        <gmd:organisationName/>
      - <gmd:contactInfo>
        - <gmd:CI_Contact>
          - <gmd:phone>
            - <gmd:CI_Telephone>
                <gmd:voice/>
                <gmd:facsimile/>
              </gmd:CI_Telephone>
            </gmd:phone>
          - <gmd:address>
```

Example of the ISO 19139 view in a browser (Firefox).

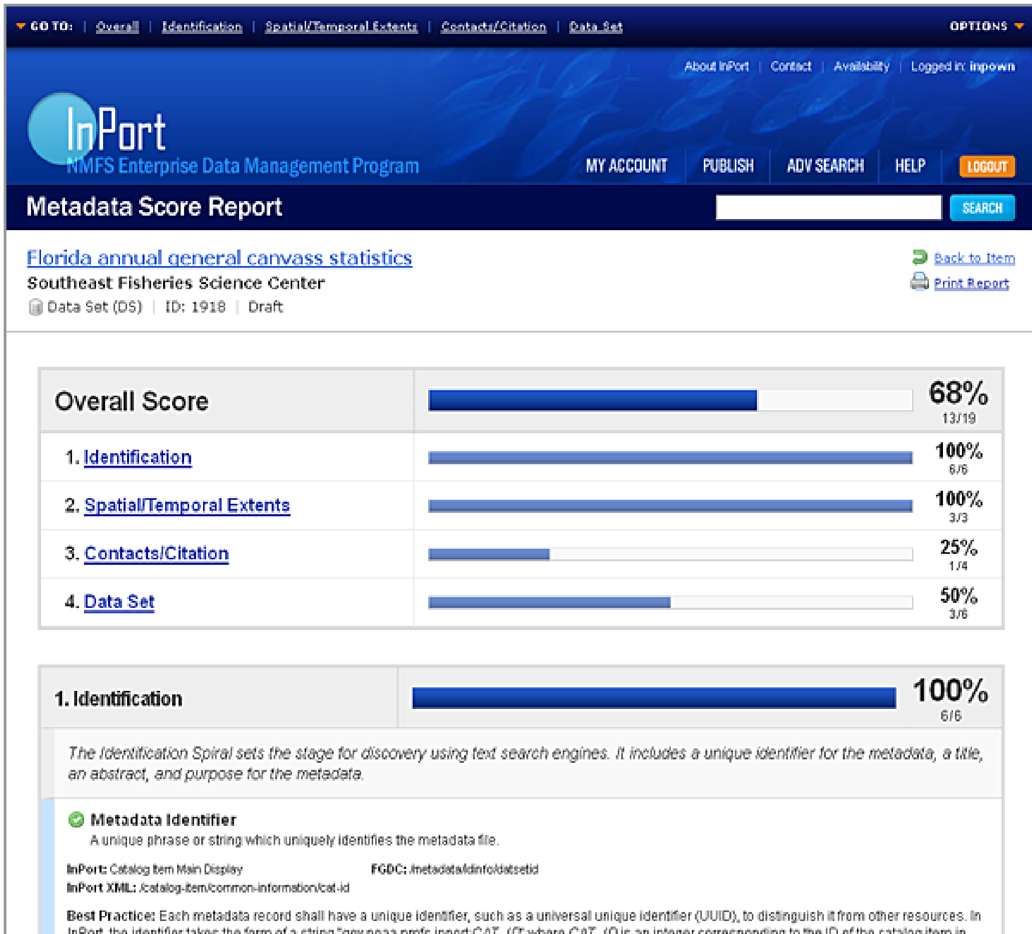
Note that not all fields in InPort have an equivalent counterpart in ISO; therefore, the generated ISO file should not be considered a complete representation of the InPort Catalog Item.

The output is a standard XML file, which can be rendered with the browser's XML viewer, or saved to the hard drive for use with other XML tools.

Metadata Score View

The Metadata Score View applies a scoring rubric to the Catalog Item and displays the results. The scoring report is used for assessing metadata completeness and quality.

6.9 Catalog Item – Metadata Score View

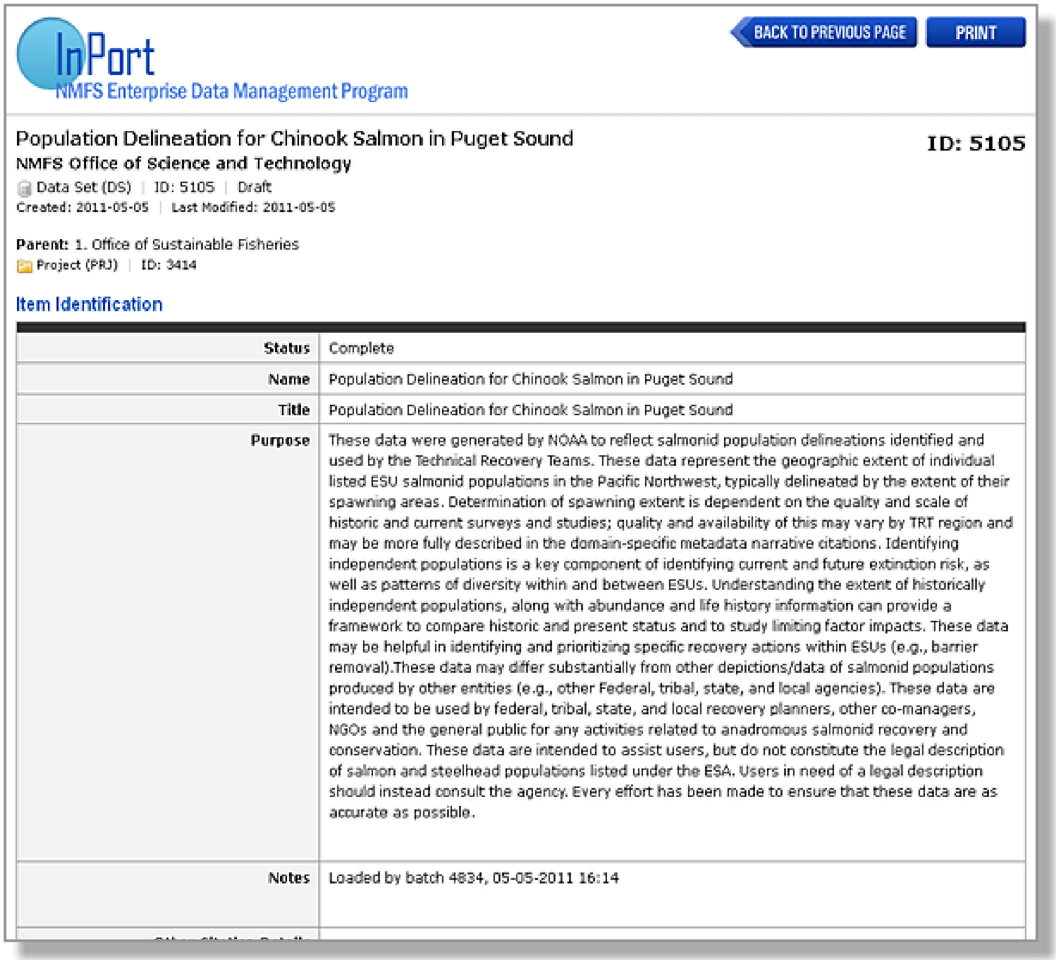


Example of the Metadata Score Report view.

Fillable Form View

The Fillable Form View displays all Catalog Item information, and the Detail Modules available for that type, in a printer-friendly format similar to paper forms. It also includes blank fields for all attributes in each Detail Module which can be filled in by hand.

6.10 Catalog Item – Fillable Form View



BACK TO PREVIOUS PAGE | PRINT

InPort
NMFS Enterprise Data Management Program

Population Delineation for Chinook Salmon in Puget Sound
NMFS Office of Science and Technology
Data Set (DS) | ID: 5105 | Draft
Created: 2011-05-05 | Last Modified: 2011-05-05

ID: 5105

Parent: 1. Office of Sustainable Fisheries
Project (PRJ) | ID: 3414

Item Identification

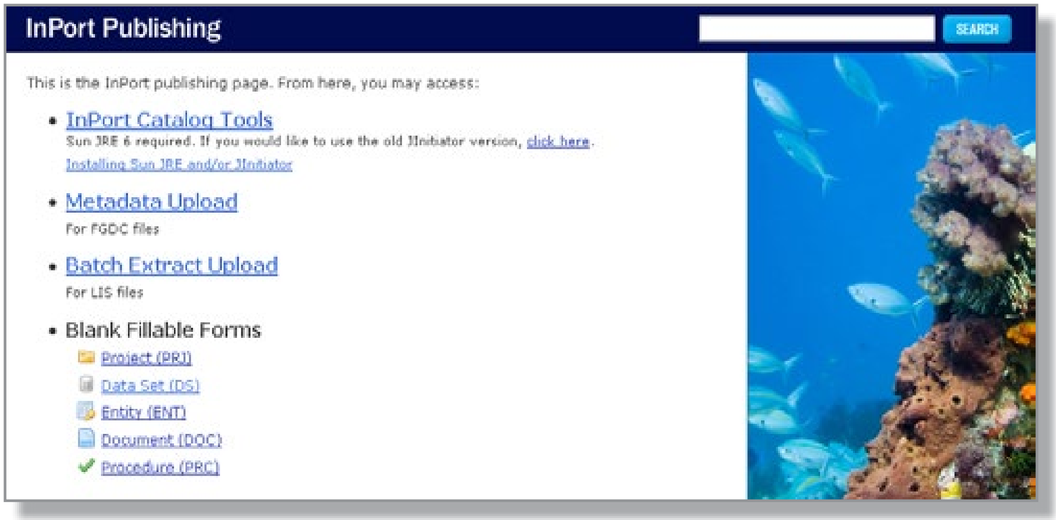
Status	Complete
Name	Population Delineation for Chinook Salmon in Puget Sound
Title	Population Delineation for Chinook Salmon in Puget Sound
Purpose	These data were generated by NOAA to reflect salmonid population delineations identified and used by the Technical Recovery Teams. These data represent the geographic extent of individual listed ESU salmonid populations in the Pacific Northwest, typically delineated by the extent of their spawning areas. Determination of spawning extent is dependent on the quality and scale of historic and current surveys and studies; quality and availability of this may vary by TRT region and may be more fully described in the domain-specific metadata narrative citations. Identifying independent populations is a key component of identifying current and future extinction risk, as well as patterns of diversity within and between ESUs. Understanding the extent of historically independent populations, along with abundance and life history information can provide a framework to compare historic and present status and to study limiting factor impacts. These data may be helpful in identifying and prioritizing specific recovery actions within ESUs (e.g., barrier removal).These data may differ substantially from other depictions/data of salmonid populations produced by other entities (e.g., other Federal, tribal, state, and local agencies). These data are intended to be used by federal, tribal, state, and local recovery planners, other co-managers, NGOs and the general public for any activities related to anadromous salmonid recovery and conservation. These data are intended to assist users, but do not constitute the legal description of salmon and steelhead populations listed under the ESA. Users in need of a legal description should instead consult the agency. Every effort has been made to ensure that these data are as accurate as possible.
Notes	Loaded by batch 4834, 05-05-2011 16:14

Example of the Fillable Form view.

Blank Fillable Forms

Blank printable forms are also available on the Publishing page for each type of Catalog Item.

6.11 Blank Fillable Form Links



Links to blank fillable forms for each Catalog Item type are available on the InPort Publishing page.

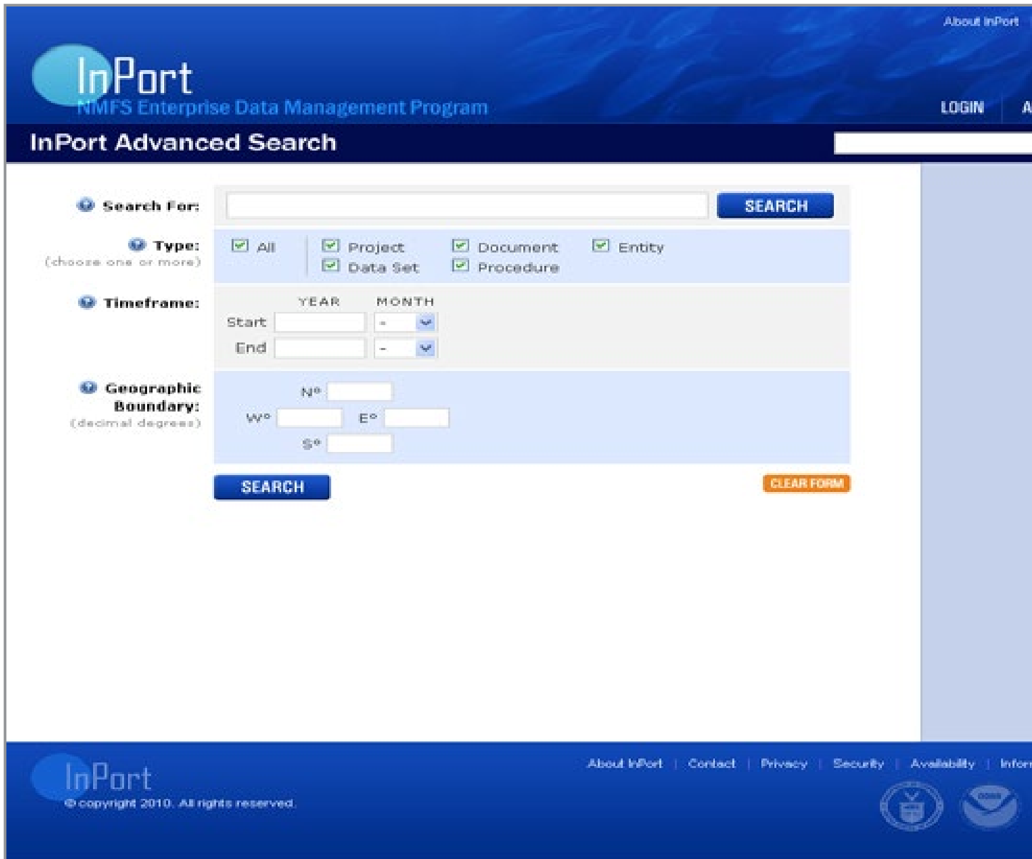
Printable View

Clicking on the "Print This Page" will reformat the page with a layout optimized for printing.

Note that this format is intended for reading; if you would like to fill in blank fields or annotate your print out, the Fillable Form View is recommended instead.

Advanced Search

6.12 InPort Advanced Search Page



The user can use the Advanced Search options to refine their search results based on temporal and spatial bounds or catalog item type.

Rules that will make your InPort search more effective:

Search Terms

Fields searched: Title, Abstract, all keywords fields

- Search terms are not case sensitive (i.e., CAT is the same as cat is the same as Cat)
- Multiple search words should be separated with a space; multiple search words will be “ANDed”. Example: If you enter effort catch regulation, only catalog items containing the words effort and catch and regulation will be found.
- Special characters including * ( ) ? [ ] , & $! ~ = + . < > / cannot be used in searches. However, an underscore (e.g., trip_num) or an embedded hyphen (e.g., two-sided) can be used.

- Partial words (e.g., statist, informa) will not be found. Wildcard characters are not available for word completion and will cause an error if used.
- You may use single or double quotes around a phrase (the phrase may not contain special characters)
- Certain words are reserved and will cause an error if used (e.g., and, or)
- Certain words are ignored and will not be found (e.g. not, the)

Catalog Item Type

- 1) You may narrow your search by selecting one or more catalog item types.

Examples:

- Click on Document to limit your search to documents only
- Hold the Shift Key and click on Project and Data Set to limit your search to projects and data sets
- To search all catalog item types, select All

Timeframe

Fields searched: timeframe start date and timeframe end date

You may narrow your search as follows:

- Enter a Start Date. You must enter at least the year (month may be blank). If the catalog item
- Enter a Date Range (Start Date and End Date). Any dates falling within the date range will be found

Geographic Area

- Enter numbers in decimal degrees. Use a minus sign ("-") for latitudes south of the Equator and longitudes east of the Greenwich Meridian (but west of the International Date Line)

Combining Search Criteria

Search criteria (Search Words, Type, Timeframe, Geographic Bounds) may be combined.

Examples:

- Enter Search Words plus a Timeframe
- Enter Search Words plus a Type
- Enter Search Words plus Type plus Timeframe plus Geographic Bounds

Note that when the search is performed, the search criteria are "ANDed".

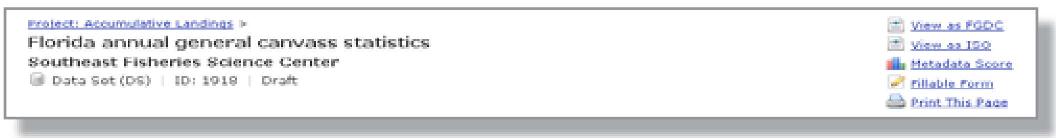
7. Metadata Score Report

Overview

The Metadata Score Report displays the result of applying a metadata quality scoring rubric to a Data Set Catalog Item. The scoring rules are determined by NMFS for the purpose of promoting quality metadata.

The report can be accessed by searching for or navigating directly to a Catalog Item in the web application. A link to the report will be available at the top right of the Catalog Item view.

7.1 Catalog Item - Metadata Score Report Link

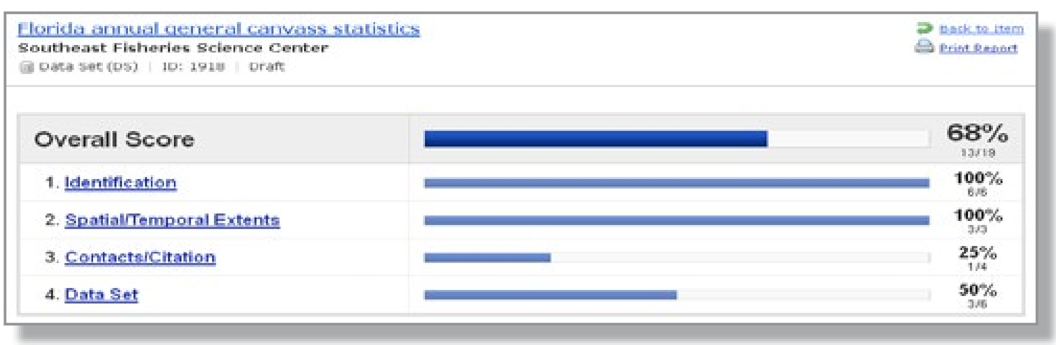


Click on the Metadata Score Report link to access the report.

Report Contents

The report consists of an overall score display, followed by individual scores for each scoring area. Scores are displayed as a percentage of rules passed, as well as a raw numeric score.

7.2 Metadata Score Report - Overall Score



The Metadata Score Report displays an overall score breakdown of each area.

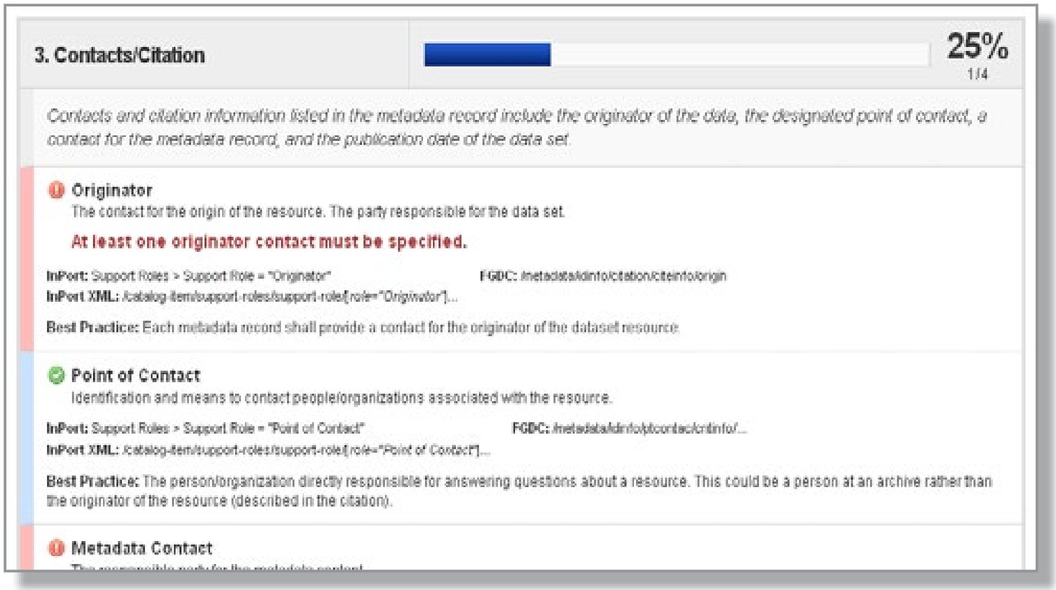
The current scoring areas are:

- Identification
- Spatial/Temporal Extents

- Contacts/Citation
- Data Set

Each rule shows the attribute it applies to, a description of the attribute, and the best practice associated with the attribute. A path is also displayed to help locate the attribute in the InPort Catalog Tools Editor, an FGDC file, or an InPort XML file.

7.3 Metadata Score Report - Scoring Area



Each scoring area displays the score and the result of each rule when applied to the current Catalog Item.

Identification Score

This scoring area encompasses the metadata fields for identification and discovery of the metadata, including fields such as the metadata identifier, title, abstract, purpose, theme keywords, and place keywords.

Spatial/Temporal Extents Score

This scoring area encompasses the metadata fields dealing with spatial or temporal extents, such as the geographic area (expressed as coordinates or a textual description), status, and time frames of the data collected.

Contacts/Citation Score

This scoring area encompasses the metadata fields dealing with contact information and metadata citation information. It includes fields such as the originator, point of contact, metadata contact, and publication date.

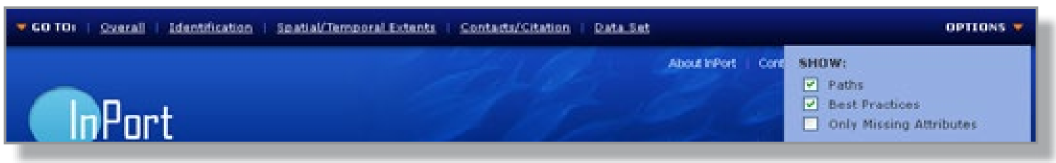
Data Set Score

This scoring area encompasses data set information fields for the metadata, such as the security class, data access constraints, data use constraints, technical environment, completeness report, and accuracy.

View Options

You can quickly scroll from section to section using the navigation toolbar at the top of the page.

7.4 Metadata Score Report - View Options



The report view options allow quick navigation to each score area, as well as control over the display of various aspects of the rules.

A number of view options can also be applied by hovering your mouse over the Options menu at the top right of the page. These options help to filter the report for specific information, and can be useful for formatting the report for printing:

- *Paths* – show or hide the paths to the attribute for each rule
- *Best Practices* – show or hide the best practices for each rule
- *Only Missing Attributes* – show only the attributes that are missing

8. Metadata Upload

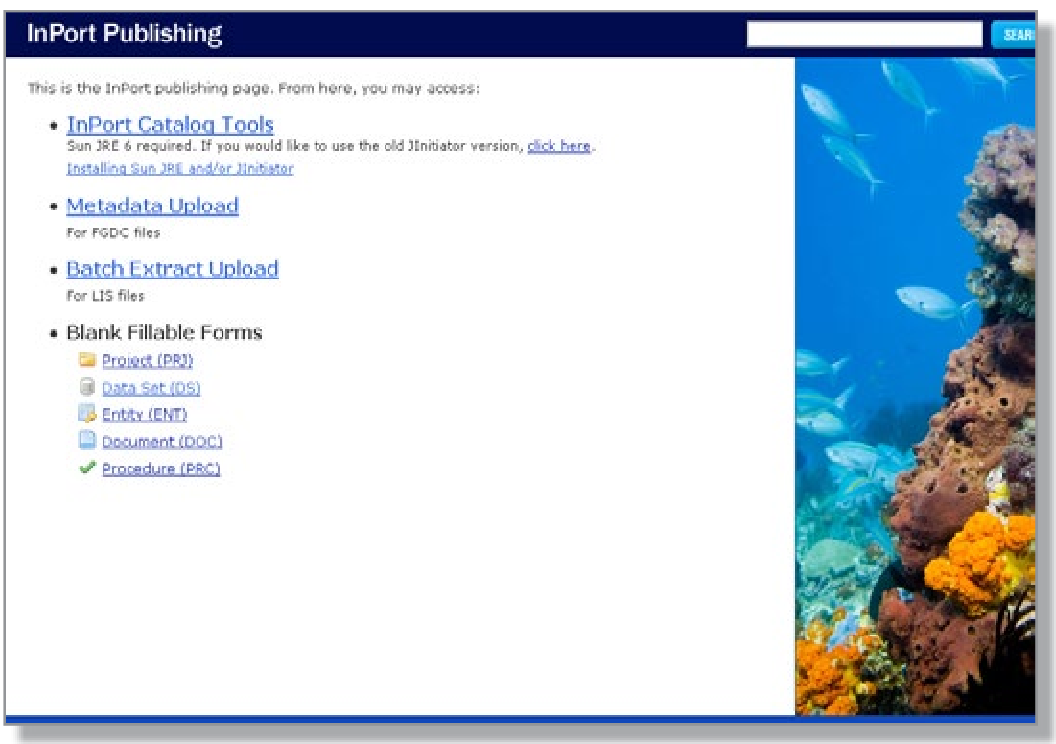
InPort allows metadata created externally to be uploaded as data sets into InPort. Currently, InPort accepts all files which confirm to the FGDC metadata standard.

The FGDC metadata standard provides a common set of terminology and definitions for the documentation of digital geospatial data.

Uploading Metadata

To begin the metadata upload process, login to InPort and click on **Publish** in the main navigation bar. After the InPort Publishing page has loaded, click on the link called **Metadata Upload**.

8.1 Publishing Page – Link to Metadata Upload



Click on the Upload Metadata link on the InPort Publishing page to start the upload process.

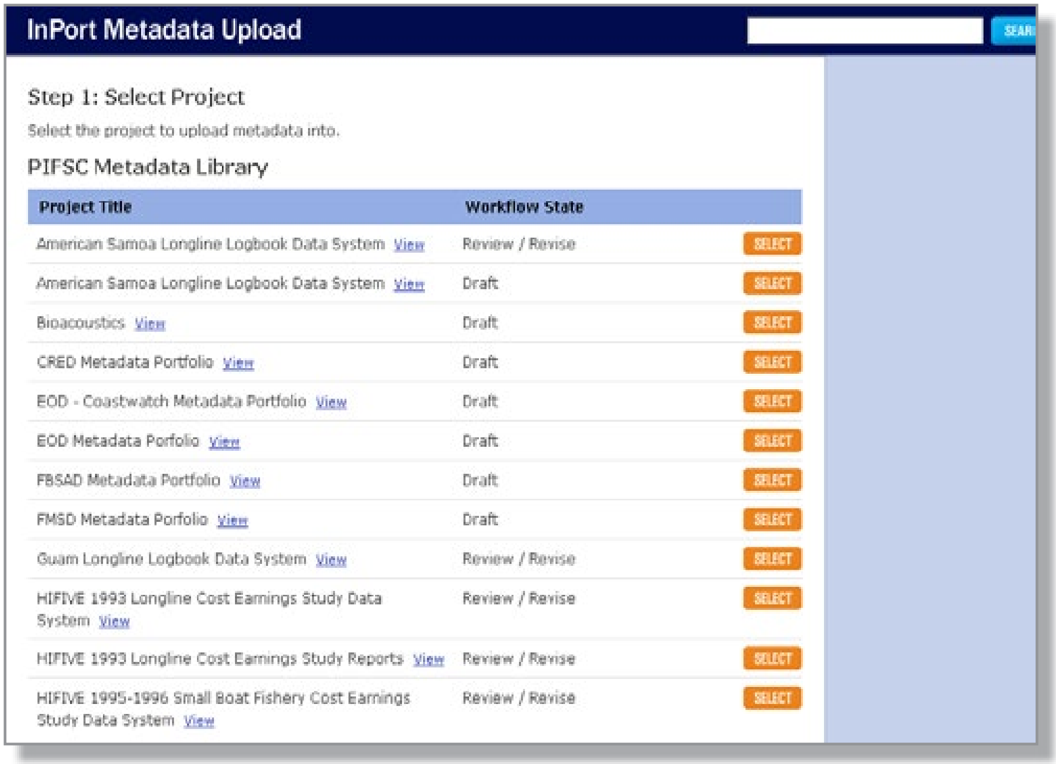
Step 1: Select Project

InPort will display a list of all the projects you have access to in the Catalog. If you do not see the project you want to upload metadata into, please contact your

Librarian to be granted access.

The report consists of an overall score display, followed by individual scores for each scoring area. Scores are displayed as a percentage of rules passed, as well as a raw numeric score.

8.2 Metadata Upload – Select Project



Select the project to load the metadata into from the list of available projects.

All data sets must belong to a project; consequently, the first step is to select the project you would like to upload your metadata into.

When you have found the desired project, click on the Select button to the right of the project name.

Step 2: Upload File

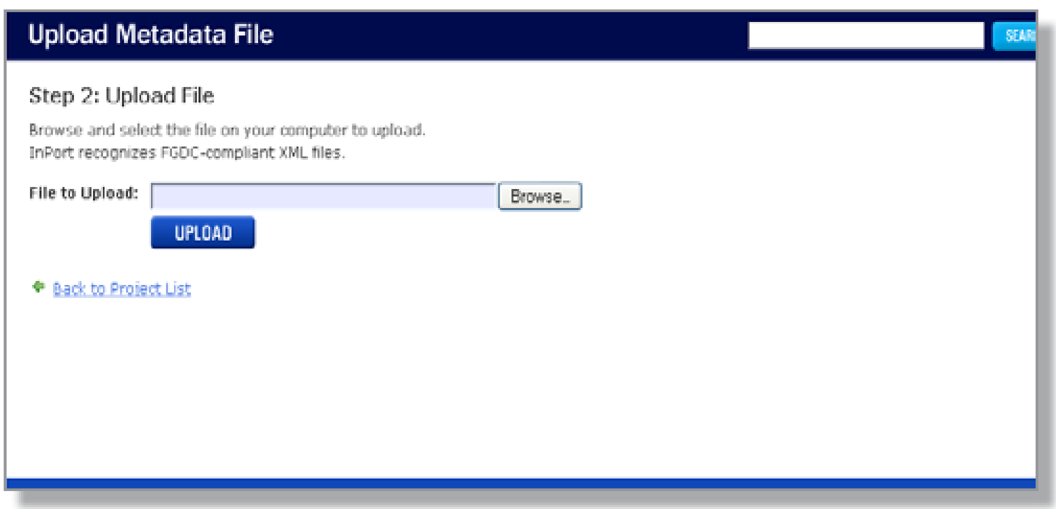
The next step is to upload the metadata file for validation. The file must meet the following requirements:

- It must be a valid XML file.
- It must be encoded in either the ISO-8859-1, UTF-8 or CP1252 character set. (If you don't know what encoding your metadata uses, it's not usually something to be concerned about. It's rare to have metadata in another character set other than these three).
- It must conform to the FGDC standard.

Note that the FGDC specification requires dates and times to be formatted according to the ANSI 1986 standard. For example, the following are valid date and time values:

ANSI Date/Time Format	Means
2010	The year 2010
201005	May 2010
20100501	May 1, 2010
20100501T1000	May 1, 2010, 10:00 AM Local Time
20100501T1000+0100	May 1, 2010, 10:00 AM (+1:00 GMT)

8.3 Metadata Upload – Choose File



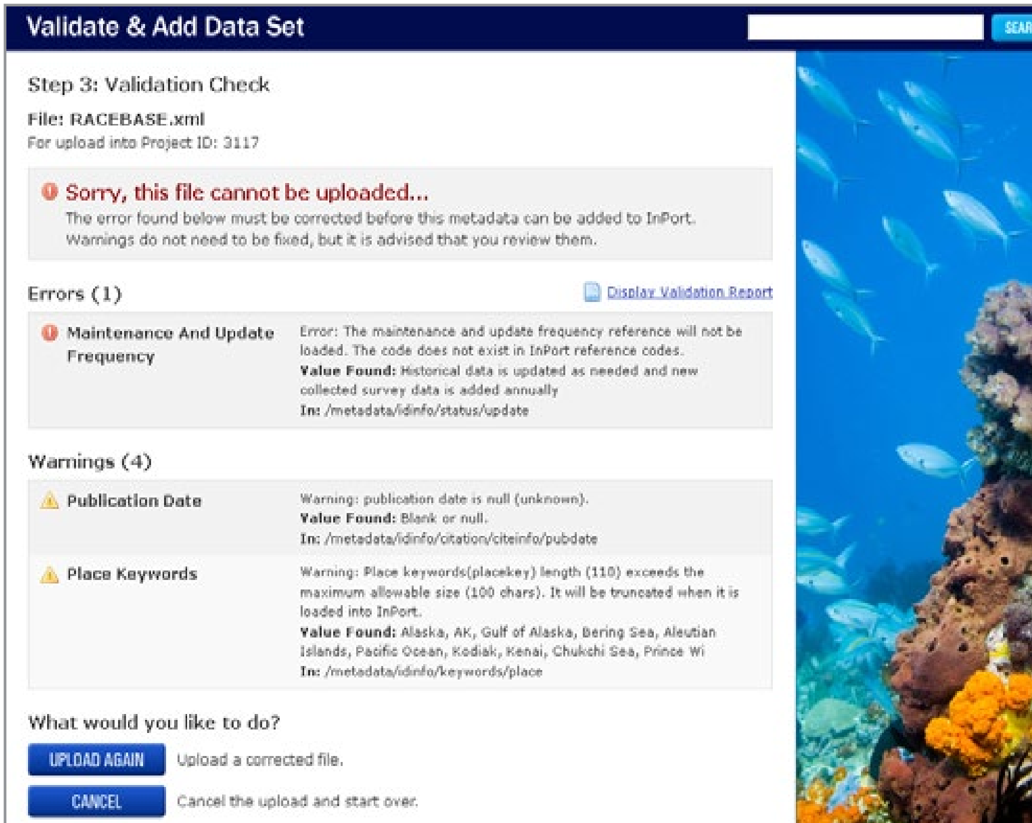
Click Browse to select the file to upload from your hard drive.

Click on the Browse button to locate the file, and then click Upload to transmit the file to the server.

Step 3: Validation Check

Before metadata can be added to InPort, it must pass a validation check. Note that this validation is only for the purposes of uploading into InPort. It does not, for example, ensure that the file is a valid FGDC file (MERMAid is one example of a tool can be used for FGDC validation).

8.4 Metadata Upload – Validation Report



The validation report shows a list of any errors and warnings found in the metadata, as well as options on what to do next.

The validation check will result in a list of errors and warnings. A link to display a plain text validation report is also provided, to make it easier to copy the list of issues into an email or text file.

There are 2 different types of issues that can be found:

1. **Errors** are significant issues which prevent the data set from being added to InPort. These issues must be corrected before the metadata can be added.

2. **Warnings** are less serious issues that indicate a potential problem with the metadata, but do not prevent it from being added to InPort. However, it is strongly recommended that you review these issues, as InPort may make modifications to the metadata in order to make it conform to its own model.

If any errors are found, you will not be able to add the metadata to InPort as is. Correct the metadata file on your computer first, then click the **Upload Again** button to return to Step 2.

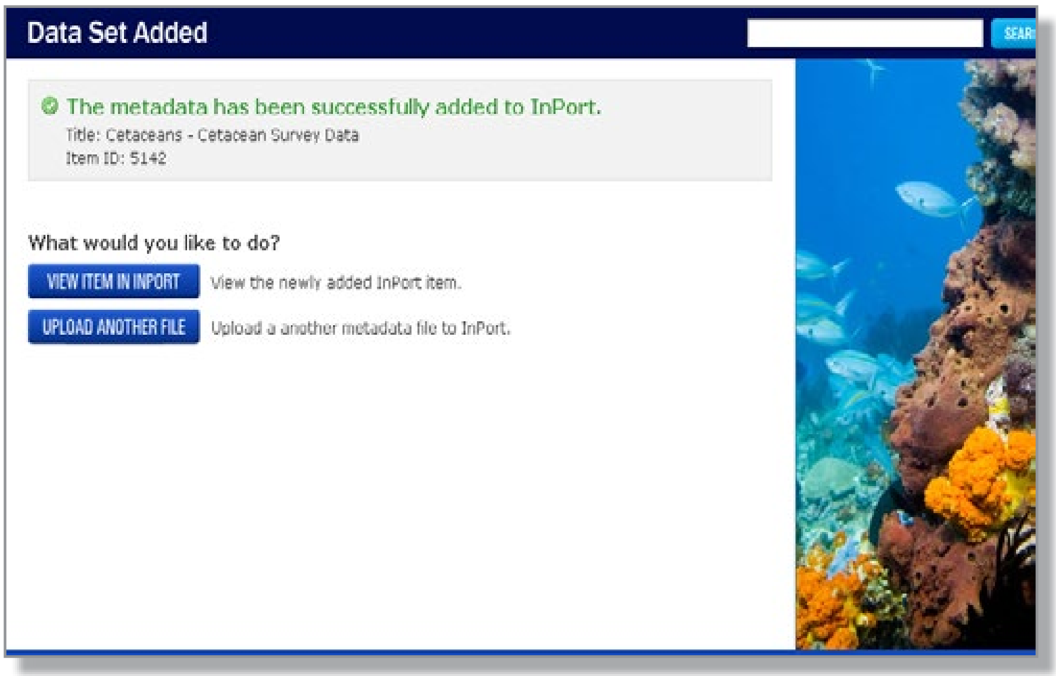
If there are warnings, but no errors, you can choose to add the metadata as is to InPort. Or, you can make changes to the original file and click the **Upload Again** button to try again.

To add the uploaded metadata to InPort, click on the **Add to InPort** button.

Viewing the Newly Added Data Set

After your metadata has been added to InPort, you can click on the **View Item in InPort** button to review the metadata added as it is stored in InPort.

8.5 Metadata Upload – Data Set Added Successfully



Successful addition of a new data set into InPort. The new item can be viewed in InPort, or more files can be uploaded.

If you have more data sets to add, click on the **Upload Another File** button to upload the next file.

9. Catalog Batch Loading

Interface to Oracle Databases

InPort can load some entity and attribute information from the data dictionary of an Oracle database. This information includes table and column names, data types and sizes, and comments.

The interface was created because many of the databases relevant to NMFS currently use Oracle.

The interface between InPort and the Oracle database runs in four stages.

Stage 1 - Creating the Extract File (10g R2 or later)

In this stage, you will create an extract from table definitions in an Oracle data dictionary. These instructions apply to Oracle databases version 10g, Release 2 or later. Earlier versions of Oracle require a much more complex procedure than this, described later.

Instructions

Step 1: Download the extract script.

The extract script is available from:
https://inport.nmfs.noaa.gov/inport/downloads/inport_extract.sql

Step 2: Customize the script.

If there are any tables or views that you do **not** want included in the extract, edit the line at the start of the script to add these to the ":exclude_tables" bind variable.

Name those tables as a comma-separated list. The whole list should be enclosed in single-quotes.

If a table name contains spaces or lowercase, then that individual table name must be enclosed in double quotes.

Note that the list is initially populated with the name 'INPORT_EXTRACT_TEMP'. This is the temporary table that the script creates, and is deleted when it is done.

Step 3: Run the script.

From there you connect to the database with sql-plus, as the Oracle user that you wish to extract as.

Run the script. It will ask for a simple name, used to construct the output file names. It will produce a pair of output files in the same folder:

a) XXX-extract.lis will contain the extract report

b) XXX-qa.lis will contain the quality-assurance report

(where XXX is the name you supplied)

Go on to Stage 2.

Stage 1 - Creating the Extract File (before 10g R2)

In this stage, you will create an extract from table definitions in an Oracle data dictionary. These instructions apply to Oracle databases version 8i, 9i, and 10g Release 1. If you are using Oracle 10g Release 2 or later, please refer to the previous section.

Prerequisites

- The Application runs on an Oracle8i/9i/10g Release 1 database

- You (or an available DBA) have the ability to create a new username, grant select privileges to DBA_ views, and modify views.

Instructions

Step 1: Download and unzip the extract scripts

The extract scripts are available from https:// inport.nmfs.noaa.gov/inport/downloads/InPortExtract.zip

Step 2: Pick an Oracle user account to run the extract script, and run inpx1.sql.

We recommend creating a single username (e.g., INPORT_USER) in a database to use for InPort extracts.

As SYS, run inpx1.sql to grant the required privileges to the username.

```
SQL> @inpx1.sql
Enter the username that will be used to run the In-
   Port extract.
InPort Extract Username: INPORT_USER
```

Step 3: Run inpx4.sql (QA Report)

See Appendices for notes on how to change directories in SQL*Plus (Windows).

Login as the user selected in Step 2, and run inpx4.sql. The script requests the application name, which is used to generate a name for the output file, <appname>-qa.lis.

```
SQL> connect INPORT_USER/password
Connected.
SQL> @inpx4
…
Enter value for appname: MYAPP
Review the output file, MYAPP-qa.lis. Correct and
   update application table and column comments as
   needed.
```

Step 4: If necessary, modify inpx2.sql to include or exclude tables. Rerun inpx4.sql and review missing comments.

Inpx2.sql defines a view inport.my_tables_views_v that should return one row for every table and view you want to include in the extract.

If you modify inpx2.sql, be sure to save changes, as other scripts use this file.

Step 5: Run inpx5.sql

```
SQL> @inpx5
Enter a short application name code.
It will be used as a prefix for output file names.
Example: Application name INPRTDV
Outputs: INPRTDV-qa.lis will contain missing comments
   report
INPRTDV-extract.lis will contain the extract report
Application Name: MYAPP
…
```

Inpx5.sql will create the extract file MYAPP-extract.lis.

Stage 2 - Uploading the extract file

In this stage, you will copy the extract to staging tables in an existing InPort Catalog Project through the Batch Extract Upload feature on the InPort website.

Prerequisites

- You must be an authorized Librarian, Publisher, or Author.
- You must have access to a Project with a Data Set that the extract will be loaded into.

Instructions

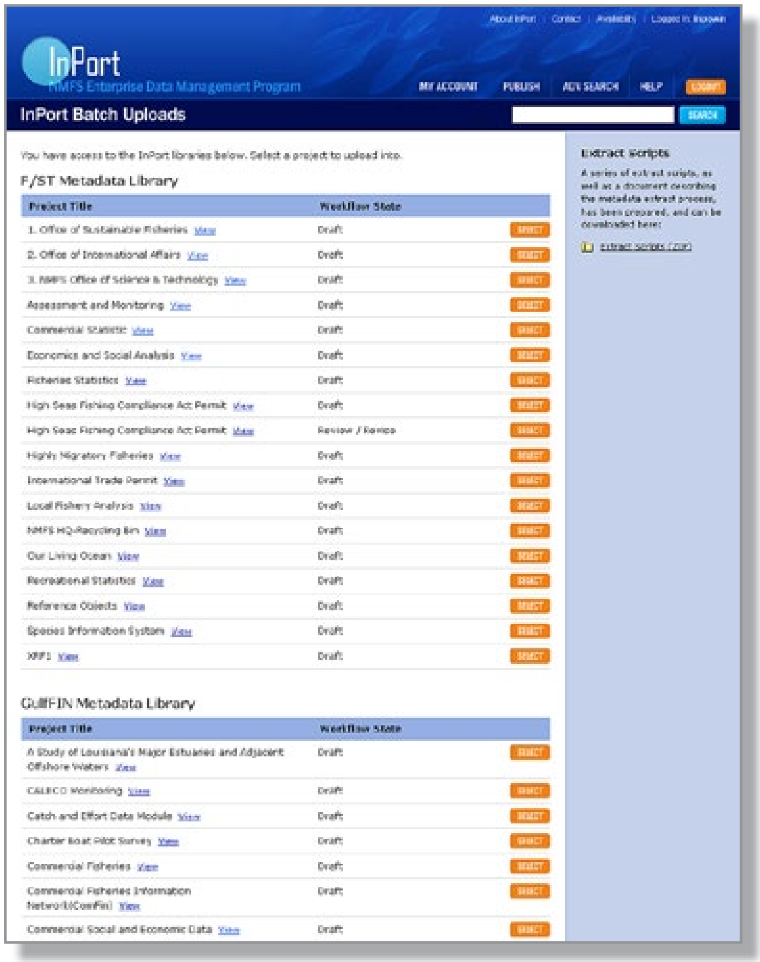
Step 1: Login to the InPort Website

Go to InPort Website at: https://inport.nmfs.noaa.gov/inport and click on the Login link to login.

Step 2: Navigate to the Batch Extract Upload page.

After logging in, click on the **Publish** link in the navigation bar. Then, click on the page link, **Batch Extract Upload**.

9.1 InPort Batch Upload Page



The InPort Batch Upload page should list all catalog Projects accessible to the currently logged in user. If the list does not include the desired target Project, then the user or his/her catalog Librarian will need to create the Project using the Catalog Editor tool. Clicking on the Batch Upload button will open the Batch Load page where the user can select his/her file for batch loading.

Step 3: Select the Project to upload to

From the list of available projects, select the desired Project to upload into by clicking the corresponding Select button.

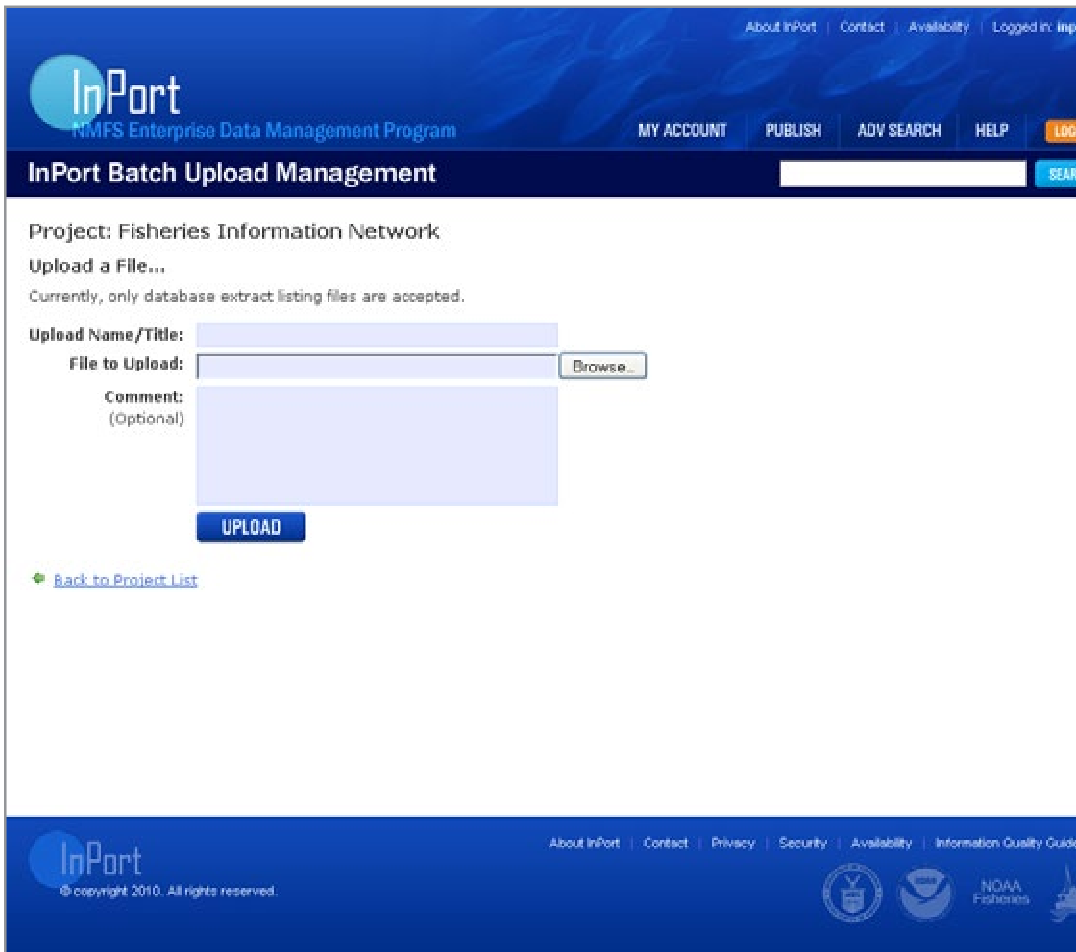
If you do not see the Project in the list, contact your Librarian to ensure you have the appropriate access.

Step 4: Upload the extract file

Enter a name for the upload. We recommend including the name of the database and the extract date, e.g., PIR Observer, 4/15/05. You may also add any additional notes in the Comment field.

Click on the **Browse** button to locate the extract file on your hard drive. Then click the **Upload** button.

9.2 Batch Upload Page



Clicking on a Select button for a catalog Project from the InPort Batch Upload page, opens the Batch Upload page where the user can choose and describe a file from his/her local system for batch loading into the InPort staging tables.

Step 5: Confirm the extract file has been uploaded

After clicking **Upload**, the page should reload, and the uploaded file should appear in the table at the top of the page, with status "Loaded."

Stage 3 - Edit/Validate the Upload Batch File

In this stage, you will validate the table/column specifications in the file you uploaded, and make any necessary corrections.

Prerequisites

- You must be an authorized Librarian, Publisher, or Author.

Instructions

Step 1: Launch the InPort Catalog Tools application.

From the InPort Website Publishing page, click on the link, **InPort Catalog Tools,** and login to the application.

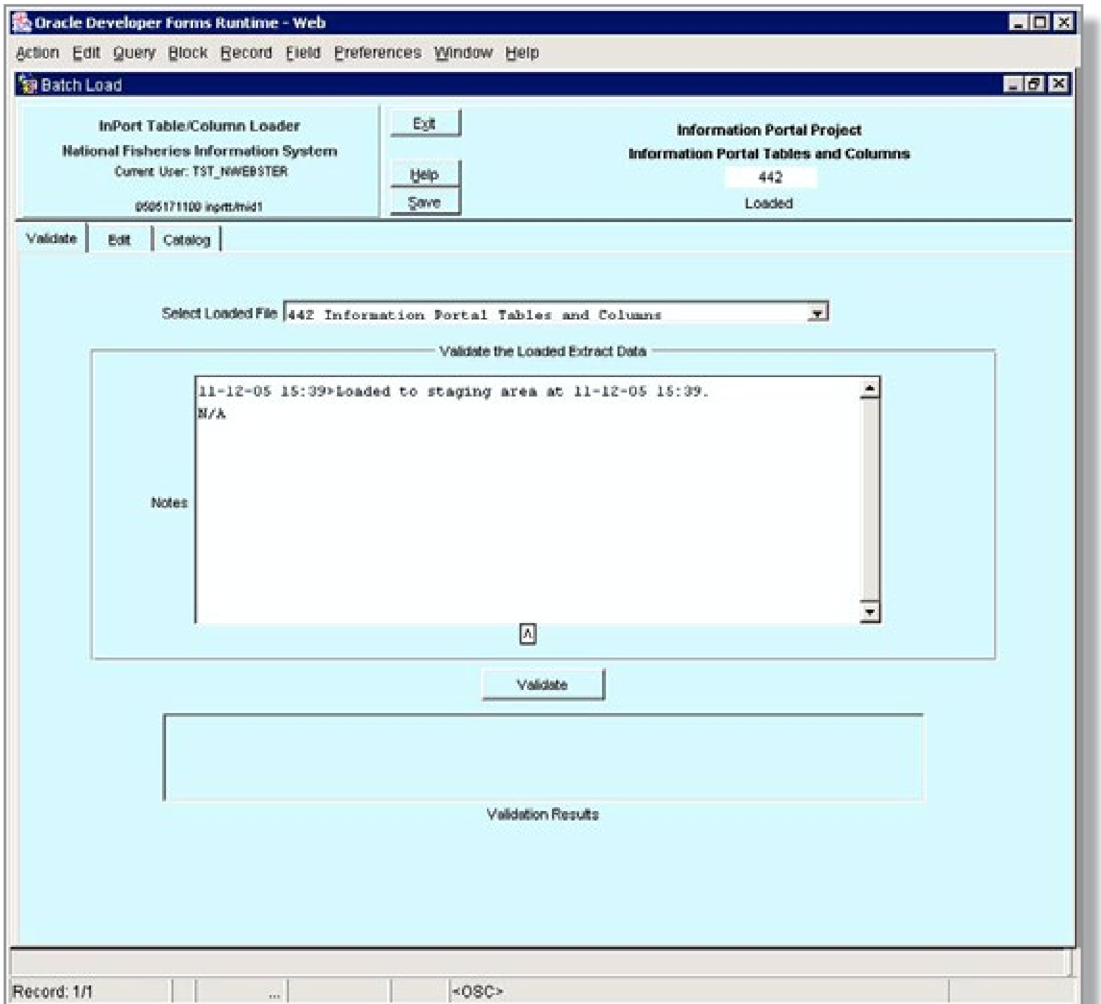
Step 2: Navigate to the Table/Column Loader

Click on the **Table/Column Loader** button.

Step 3: Specify the batch upload file to validate.

On the Validate tab, select the name of the desired batch upload file from the Select Loaded File dropdown list. Then click on the **Validate** button.

9.3 Table/Column Loader Tool – Validate Tab



Use the Validate tab on the Table/Column Loader tool to select a loaded batch file and run validation on it.

Step 4: Review the file.

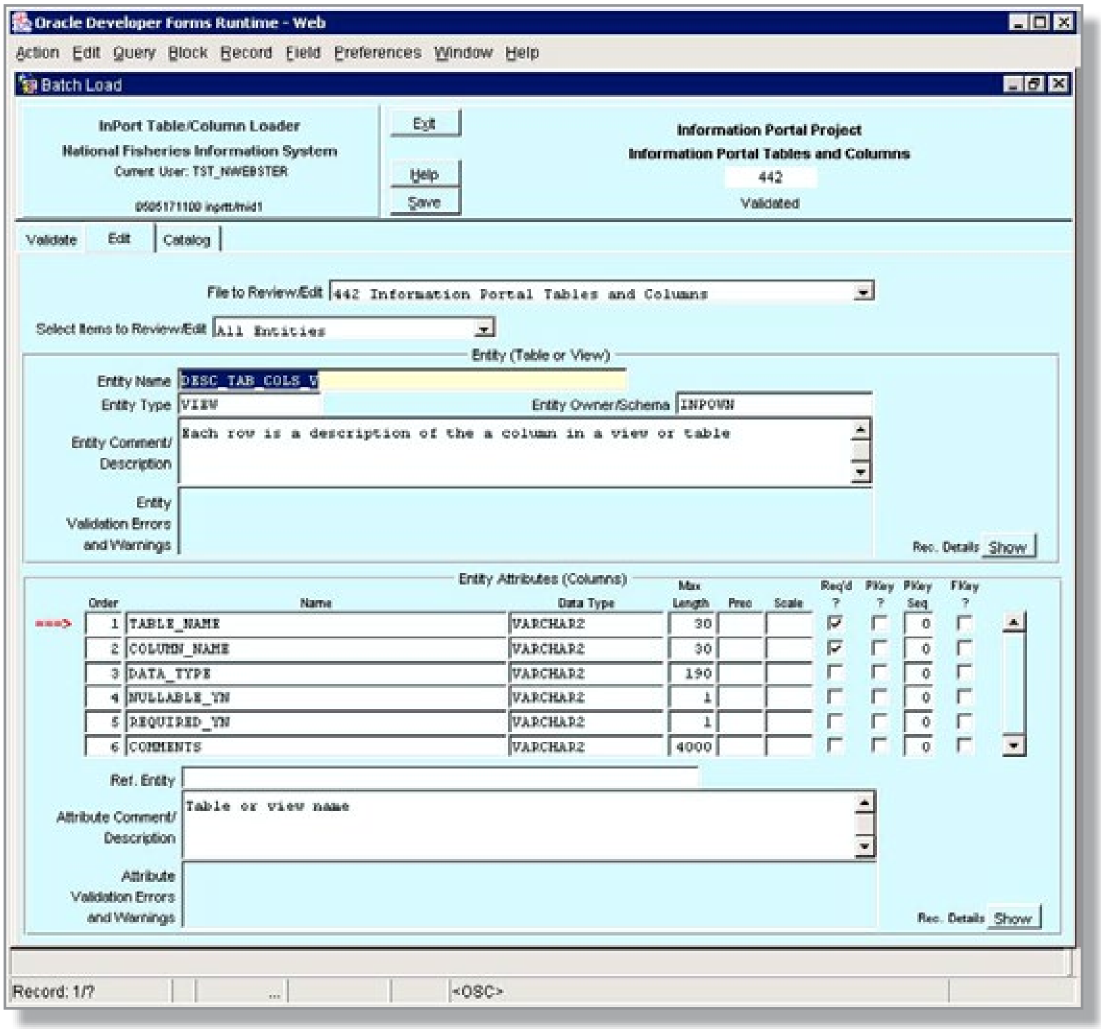
Click on the Edit tab and select a file to Review/Edit. Then use the dropdown list labeled **Select Items to Review/Edit** to choose which items to edit (all or only errors on tables or columns).

Edit the entity/attribute (table/column) information as needed.

Step 5: Save changes and verify.

Click **Save** when you are done. If validation failed, repeat the Validation steps.

9.4 Table/Column Loader Tool - Edit Tab



Use the Edit tab to review and/or revise the table and column (entity/attribute) information that is in the staging tables. Remember to re-run validation after saving any changes.

Stage 4 - Copy Batch File to InPort Catalog

In this stage, you will copy the validated contents from the staging tables into the InPort Catalog.

Prerequisites

- You must be an authorized Librarian, Publisher, or Author.
- An InPort Data Set has been created under the appropriate Project item to hold the entities and attributes (tables and columns).

Instructions

Step 1: Select the validated file.

In the Table/Column Loader tool, click on the Catalog tab. Select the file validated in Stage 3 from the **Validated File** dropdown list. If you are re-importing batch data, use the **Previously Cataloged File** dropdown instead.

Step 2: Select the Data Set that you will copy into.

Select a Catalog Data Set from the dropdown list.

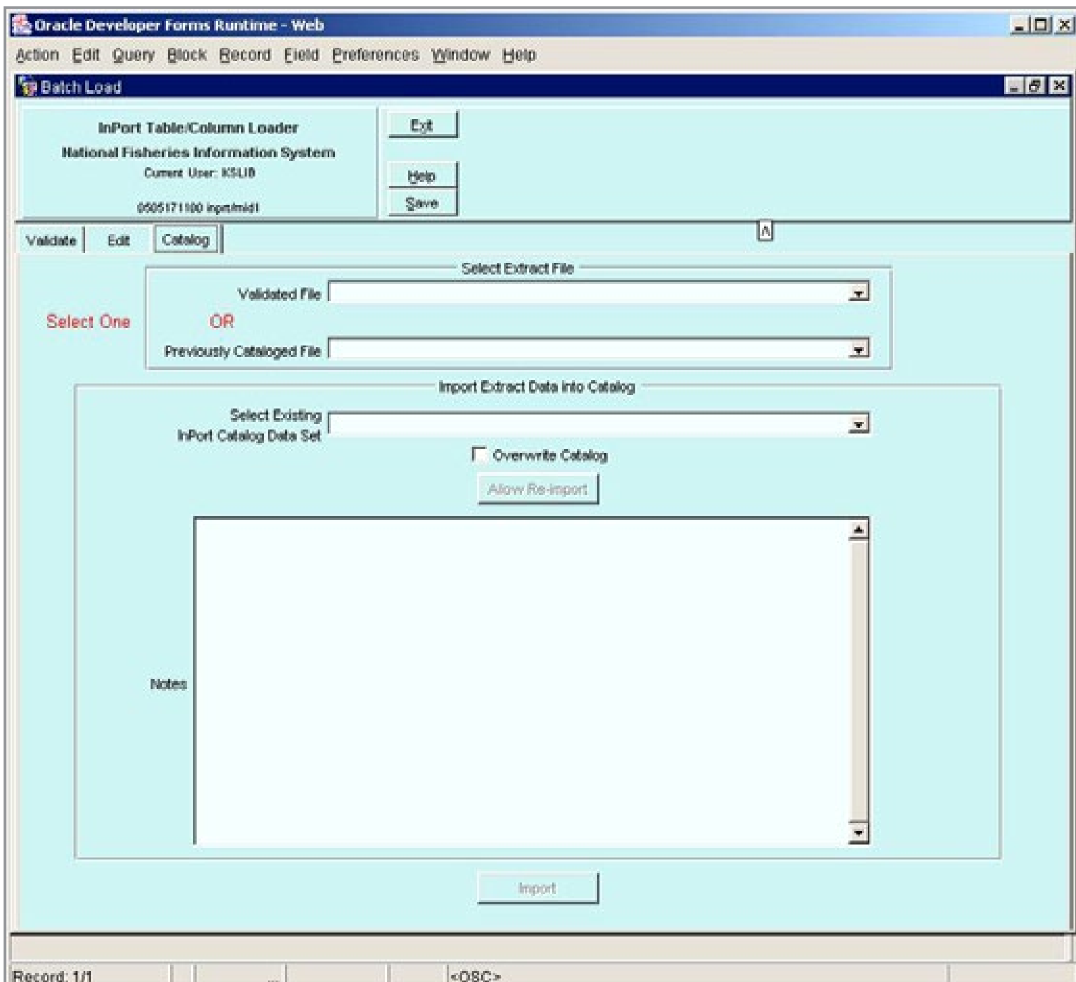
Step 3: Import the data.

Add any additional notes if desired, then click on the **Import** button.

Step 4: Review the imported contents.

You can use the **InPort Catalog Editor** tool to review the contents of the Data Set and to complete the InPort publication process for the new tables and columns.

9.5 Table/Column Loader Tool – Catalog Tab



Use the Catalog tab to import the Entity type Catalog Items based on the data in the validated batch file. The selected Data Set will be the parent catalog item of the new Entities. The Notes field will show a history of the loading process. Clicking on the Import button will copy the contents of the staging tables into the selected catalog Data Set. This tab can also be used to re-import or refresh the table/column information from the batch load.

How to Re-import Batch data into the InPort Catalog

1. In the Table/Column Loader tool, select the *Catalog* tab.
2. Select a **Previously Cataloged File** from the pop-list
3. Select a **Catalog Data Set** from that pop-list.
4. Add any additional comments in the **Notes** field as needed.
5. Click the *Import* button.
6. Use the **CATALOG EDITOR** tool to review the contents of the Data Set and to complete the InPort publication process for the new tables and columns.

Appendix A - Glossary of Terms

General Terms

The following list contains definitions of some of the terms used within the InPort metadata catalog system.

Catalog Batch Loading - InPort can load some entity and attribute information from the data dictionary of an Oracle database. This information includes table and column names, data types and sizes, and comments.

Catalog Hierarchy - Catalog items may be organized in a hierarchy that defines the parent-child relationships between catalog items. Each catalog item may belong to one-and-only-one parent catalog item. Each catalog item may be the parent of one or more catalog items. Each catalog item may not be the parent of itself. There are specific rules about which catalog item types may be children of other catalog item types (see InPort User Guide for details).

Catalog Item - A searchable record that describes fisheries dependent or independent information of significance to NOAA Fisheries. There are nine types of catalog items: Projects, Data Sets, Data Entities, Documents, Domains, Procedures, Models, and Data Collection Items

Catalog Item Identification - Basic information about the identification, purpose, and location of the catalog item

Catalog Workflow Control - Each Catalog Item (e.g., a data table or data entity) will be in one of six publication control states. The publication control state determines which operations may be performed on the catalog item and which InPort User Roles may perform those operations.

Data Standard - Information that defines a standard method of storing, managing, and using a specified type of data in a database

Detail Module - Detail Modules may be used to describe individual Catalog Items in greater detail. For example, a database table (Data Entity) may be described by listing its columns (Data Attributes); a Data Collection Item can be further described using a Time Frame to define when is was collected and a Procedure for how it was collected.

Event History - List of events relating to the catalog item, including dates, event descriptions and persons involved

InPort Author - InPort User Role that allows the person to create and edit metadata in their assigned InPort Library while the metadata is in Draft state

InPort Catalog - the collection of InPort Libraries that contain the metadata for cataloged information items.

InPort Data Steward - InPort Data Stewards have the same catalog privileges as an InPort Reader but have the ultimate responsibility of authorizing or rejecting InPort Catalog Access Roles for their InPort Library.

InPort Librarian - An InPort Librarian can create and manage catalog Persons and InPort user accounts for their Metadata Library. Librarians can create and manage catalog project access requests, authorizations and rejections. Librarians create new organizations under their Organization and can create and manage catalog project folders under their Metadata Library.

InPort Library - an organization's Metadata Project. The Inport Catalog contains many InPort Libraries.

InPort Organization - Organization unit or business or professional entity (e.g., division, department, etc.) that is registered in the InPort Catalog

InPort Person - A person that is registered in the InPort Catalog. People that serve in data support roles for catalog items and/or InPort User Roles are required to be registered in InPort

InPort Publisher - InPort Publishers manage the review of metadata and ensure that quality assurance processes are completed. Publishers should give feedback and advice to InPort Authors on metadata quality and sufficiency. Publishers are responsible for web publication, either internally or externally, and for withdrawing metadata for correction or further review. Publishers will monitor metadata issues activity and ensure that issues resolution occurs in a timely fashion.

InPort Reader - InPort Readers review catalog items through the Catalog Editor or log onto the InPort web site to search and view internally published catalog items. Readers do not have any edit abilities. Readers are responsible for reporting any metadata issues.

InPort User Role - The privileges and responsibilities of an InPort user within the InPort Catalog and/or InPort Libraries and Projects. Current roles include InPort Administrator, InPort Librarian, InPort Author, InPort Publisher, InPort Data Steward, and InPort Reader

Organization Assignment - Controls the InPort Libraries in which an InPort Person may be granted InPort User Roles

Published-External - Catalog items published to the general public and are available in InPort web search.

Published-Internal - Catalog items published in a restricted mode and available in InPort web search to InPort Users that are currently logged into the InPort web site.

Record Details - Auditing details (date of change, changed by) for a given record

Catalog Item Types

The following is a list of the major types of objects for which metadata is collected in InPort. The acronym (in brackets) is used in the search results to denote the type of the catalog item.

Project [PRJ] - project type catalog items can be thought of as metadata folders.

A Project folder might, indeed, describe a real-life data project, it might also be used as a convenient way to describe a set of related items under which each of the collected items may be cataloged.

Data Set [DS] - a catalog item of type Data Set can describe a Database, a collection of related data Files, or a user defined collection,as described in its Abstract.

Data Entity [DE] - a catalog item of type Data Entity can describe a data table, a data file, a data report, a spreadsheet, a data entry form with data, an xml file, or other user defined information item that itself contains data attributes (columns or fields). Data Entities are most frequently thought of as Tables. Data Entities normally are child items of a catalog Data Set.

Document [DOC] - any existing document that relates to the parent catalog item. If a document contains data, and thus needs to be described with procedures or attributes, then it should probably be cataloged as a catalog type Data Entity.

Procedure [PRC] - a procedure, protocol, or process that is relevant to the parent catalog item

Data Collection Item [DCI] - the description of the collection of a specific type of information within a data collection project/effort, such as trip number, sea-surface temperature, and hook type. A well documented data collection system will include information on the history, purpose, collection methods, and business rules for each type of information, or data collection item, which is collected.

Detail Modules

The following is a list current "detail modules" collected for items cataloged in the InPort:

Acronyms - An abbreviation used in the context of a catalog item

Data Access - Details on the restrictions and legal prerequisites for accessing the data. Includes any access constraints applied to assure privacy or intellectual property and any special restrictions on the use of the data

Data Attribute - A piece of data collected and stored in a table, field, cell, or form or a calculated value. Data attribute records always reside under a Data Entity parent item.

Data Quality - Details on usage constraints, completeness, and accuracy of the catalog item

Downloads - List of available files, images, and documents for the catalog item with details and links for obtaining them

FAQs - List of questions and answers that have proven helpful to the understanding and use of the catalog item

Geographic Area - Spatial bounds and geographic description of the catalog item.

Glossary Terms - List of terms and definitions specific to the catalog item

Issues - List of problems, risks, or questions about a catalog item

Related Items - List of catalog items that have a user defined relationship to another catalog item

Support Roles - List of people and organizations with jobs or responsibilities for the catalog item

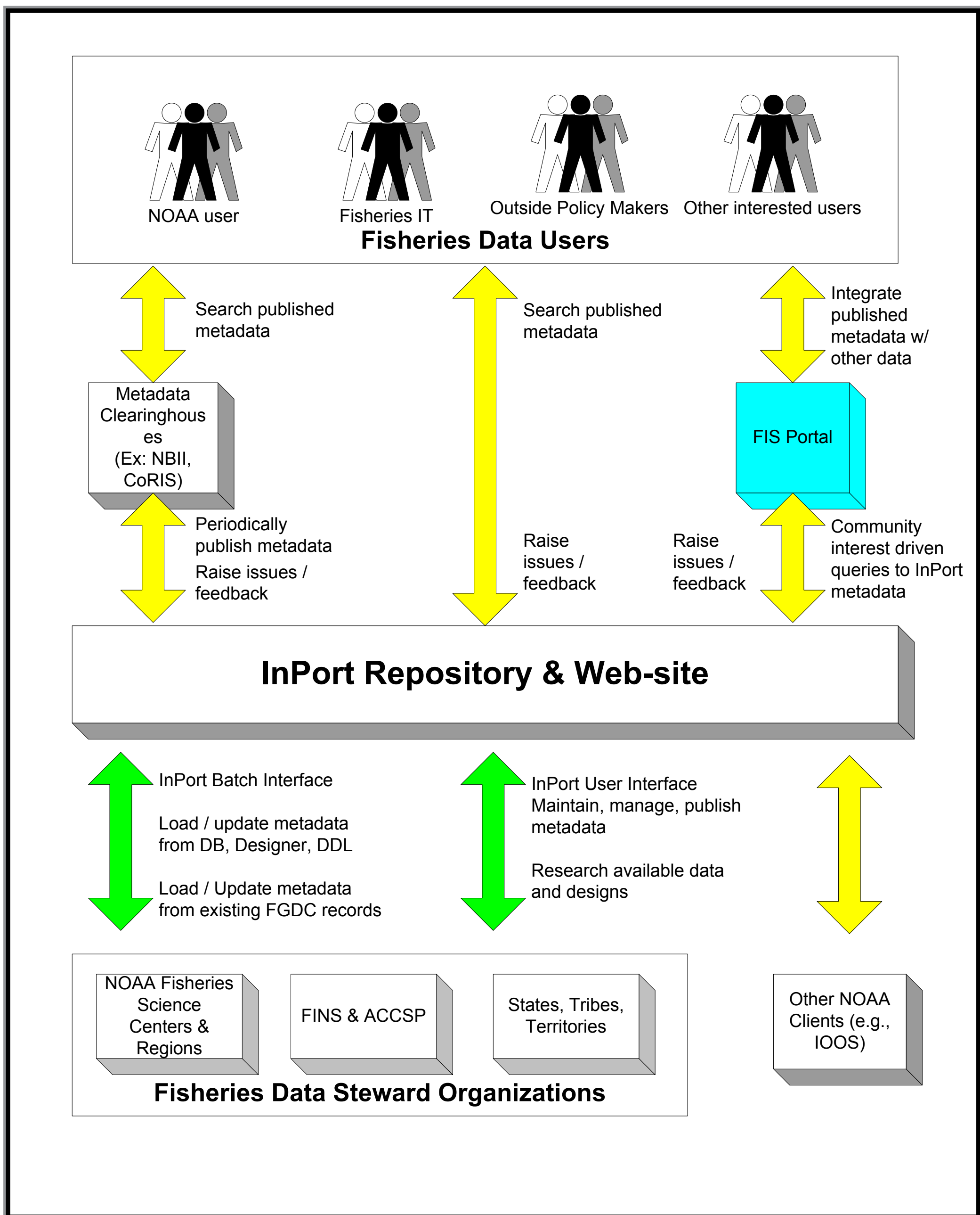
Technical Environment - Description of the data in the producer's processing environment, including details such as the name of the software (including version), the computer operating system, file name (including host, path, and filenames), and the data size

Time Frames - List of temporal limits of the catalog item which can be based on either time/date or an event, (e.g., trip)

URLs - List of internet addresses that are relevant to the catalog item

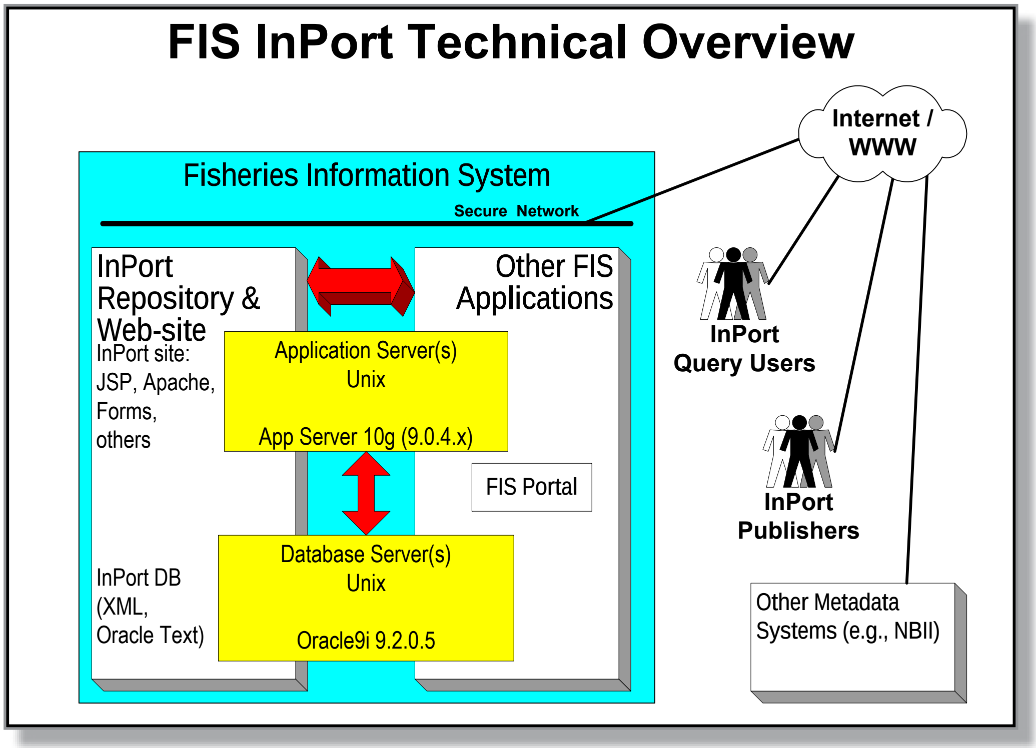
Appendix B - InPort Architecture

C-1 FIS InPort



InPort has been identified as a core tool for developing the National Fisheries Information System.

C-2 InPort Technical Overview



InPort Technical Environment

- Designed to run in the FIS technical environment
- FIS technical environment
- Database – Oracle9i (9.2.0.5)
- Application Server – 10g (9.0.4)

Major Components

- Search and Retrieve Published Catalog Items (JSP, PSP)
- Data Entry and Publication (Oracle Forms 10g)
- Database (Oracle9i, XML, Oracle Text)
- Interfaces (Inbound / Outbound)

Search and Retrieve

- JSP, Apache Web application

Simple Search

- Searches all published catalog items
- Enter one or more search words. Search results include any item that matches ALL search words.
- Uses Oracle Text Context indexes

Internal/External Search

- Internal searches cover Catalog Items published Internally (to FIS Partners). This requires a login. Results are encrypted over HTTPS.
- External searches cover Catalog Items published Externally. These are publicly available.

Future: Advanced Search

- Search of individual fields or keywords
- Use Oracle Text for complex searches

Data Entry and Publishing

- Oracle Forms (9.0.4)
- Requires users to download and install Jinitiator
- Runs over HTTPS

Main Applications

- Library Manager – Administrative functions
- Catalog Editor – Metadata entry, maintenance and publishing of catalog items and catalog hierarchy

Database

Uses Oracle XML API

- To generate XML docs in response to Search queries

Uses Oracle Text

- To support searches of eight fields:
    - Title
    - Name
    - Abstract
    - Notes
    - Theme Keywords
    - Place, Keywords
    - Temporal Keywords
    - Stratum Keywords
- Future
    - Use controlled thesauri for keywords
    - Expand InPort us of the Context search engine

Basic Design

- Catalog uses a hierarchical design
- Catalog Related Items allows reference links between one catalog item and another. Reduces redundancy.
- PL/SQL APIs for most complex data manipulation and retrieval
- View layer for all Forms and Web access

InPort Interfaces

Outbound

- Search results are XML docs
- Future: More XML documents

Inbound

- Flat file upload of Oracle8i/9i/10g data dictionary extracts
- Future: XML based exchange format

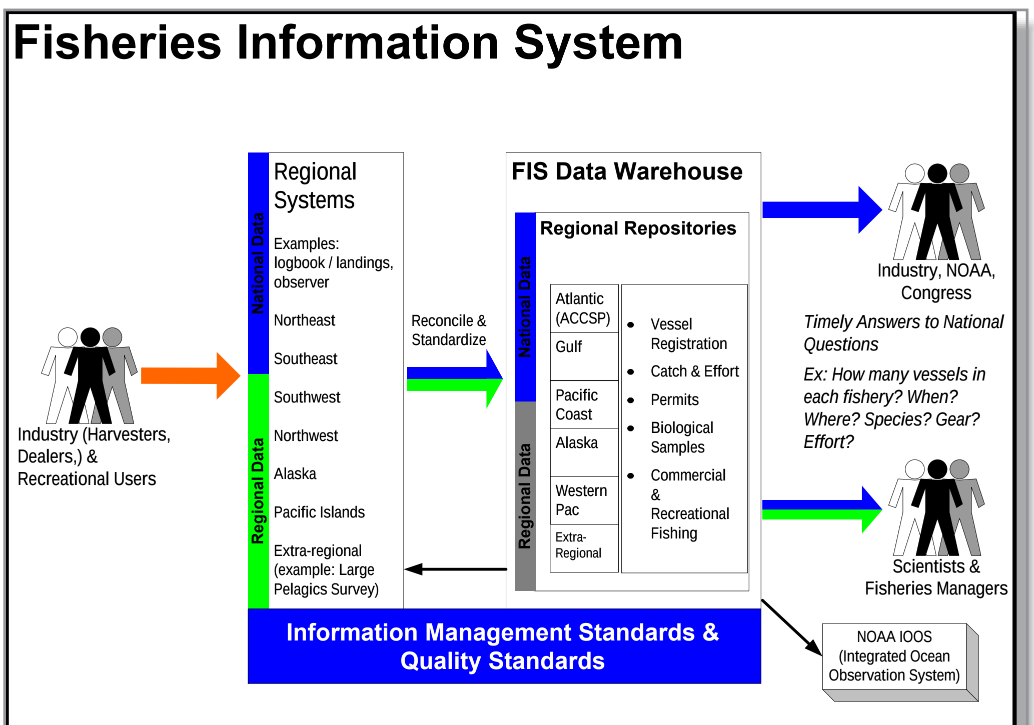
Appendix C - National Fisheries Information System

National Fisheries Information System

FIS was first described in broad terms in section 401 of the Magnuson-Stevens Act (1996 amendments). FIS was described in more detail in the Proposed Implementation of a Fishing Vessel Registration and Fisheries Information System [7].

Some of the major objectives of FIS are a standardization of critical information (e.g., vessel, gear, regions, effort, trips, and time), non-duplicative integration, timely reporting, and confidentiality. It is also supposed to minimize the paperwork burden on fishermen.

D-1 FIS Model



The proposed FIS model is founded on the development of information management standards and data quality standards that will allow timely integration and analysis of Fisheries Dependent data.

Appendix D - InPort Authorization Forms

Forms for registering and authorizing InPort Organizations, Libraries, and Persons are found on the following pages.

NOAA Fisheries
National Fisheries Information System
InPort Metadata Catalog (tel 808-983-5387, fax 808-9832922)

InPort Library Request Form

Please complete all fields on this form per instructions on the back of this form.

Organization

Organization Name

Acronym

Org. Type

Description

Street Address

City

State/Province | Postal Code

Country

Phone

URL

Business Hours

Library

Library Title

InPort Data Steward (full information should be provided on the *InPort Person Registration Form*)

First Name | Last Name

Email Address | Phone

InPort Librarian (full information should be provided on the *InPort Person Registration Form*)

First Name | Last Name

Email Address | Phone

By signing this request for an InPort Library, the InPort Data Steward for the above specified organization agrees to NOAA and NOAA Fisheries policies and guidelines with regard to Internet activities, computer account passwords, and data quality.

Authorizer's Signature | Date

Authorizer's Role

Instructions for Completing the InPort Library Request Form

The InPort Library Request form must be completed and signed by the organization's authorizing agent (director, IT manager, etc.), and fax'ed or mailed to the InPort Administrator along with completed and signed InPort Person Registration forms for at least one InPort Data Steward and one InPort Librarian for the requested Library.

Organization
Organization Name - the name of the organization
Acronym - an acronym of the organization
Organization Type - the selected organization type. [FIS (FIS Partner), FRO (Fisheries Regional Office), FSC (Fisheries Science Center)]
Description - a description of the organization
Street Address - the street address of the organization, including Suite# or P.O. Box
City - the city where the organization is based
State/Province - the state or province where the organization is based
Postal Code - the zip or postal code of the organization
Country - the country where the organization is based
Phone - phone number
URL - a Universal Resource Locator that can be used to reach the organization via the Internet
Business Hours - business hours of opertation

Library
Library Title- the proposed title of the new InPort Library

InPort Data Steward
Last Name - last name of the person
First Name - first name of the person
Email Address - contact email address
Phone - contact phone number

InPort Librarian
Last Name - last name of the person
First Name - first name of the person
Email Address - contact email address
Phone - contact phone number

Authorization
Authoirizer's Signature - signature of the individual authorizing this form[Director, IT Manager,, etc.]
Date -date the authorizer signed this form
Authorizer's Role - role that entitles the signer to authorize this form [Director, IT Manager, etc.]

NOAA Fisheries
National Fisheries Information System
InPort Metadata Catalog (tel 808-983-5387, fax 808-9832922)

InPort Person Registration Form

Please complete all fields on this form per instructions on the back of this form.

Organization

Name

Role

○ Data Steward ○ Librarian ○ Publisher ○ Author ○ Reader ○ Support Only

Person

Honorific	Last Name	First Name	Mid. Inits.	Name Inits.

Person Contact Information

Email Address

Voice Tel.

Contact Instructions

FAX Tel.

Business Hours

Street Address

Address Type
○ Mailing
○ Physical

Building Name

Room Number

Location Type
○ Business
○ Residence

City

State/Province

Postal Code

Country

Employment Information

NOAA User ID

Job Title

Employer

Emp. Type

Mgr. User ID

Routing Code

Work Location

Org. Acronym

Expertise

By signing this InPort Person Registration Form, the InPort Person agrees to abide by NOAA and NOAA Fisheries policies and guidelines with regard to Internet activities, computer account passwords, data quality, and the responsibilities of his/her InPort User Role.

InPort Person's Signature

Date

By signing this InPort Person Registration Form, the InPort Data Steward authorizes the specified person to execute the responsibilities of the indicated InPort User Role within his/her organization's InPort Library.

Authorizer's Signature

Date

Authorizer's Role

inp_pers_form v. 051129

Instructions for Completing the InPort Person Registration Form

The InPort Person Registration form must be completed for any person requiring the *Data Steward* or *Librarian* InPort User Role and is to be signed by both the person and the organization's authorizing agent (director, information manager, etc.). The signed form for either a Data Steward or Librarian must be fax'ed or mailed to the InPort Administrator.

Additionally, InPort Librarian's may use this form to register and/or assign InPort User Roles of type Reader, Author, and Publisher and have those authorized by the organization's InPort Data Steward (InPort Librarians would maintain these completed forms for their own records and do not need to submit them to the InPort Administrator as it is the InPort Librarian that registers and assigns InPort User Roles of those types.)

Organization Information
Name - the name of the organization

InPort User Roles

InPort Librarians - An InPort Librarian can create and manage catalog Persons and InPort user accounts for their Metadata Library. Librarians can create and manage catalog project requests, authorizations and rejections. Librarians can create new organizations under their Organization and can create and manage catalog project folders under their Metadata Library.

InPort Data Stewards - InPort Data Stewards have the same catalog privileges as an InPort Reader but have the ultimate responsibility of authorizing or rejecting InPort User Roles.

InPort Publishers - InPort Publishers manage the review of metadata and ensure that quality assurance processes are completed. Publishers should give feedback and advice to InPort Authors on metadata quality and sufficiency. Publishers are responsible for web publication, either internally or externally, and for withdrawing metadata for correction or further review. Publishers will monitor metadata issues activity and ensure that issues resolution occurs in a timely fashion.

InPort Authors - InPort Authors enter, review, and correct metadata that is in a Draft state in the Library or catalog Project for which they have been granted a role. Authors have authority to put metadata into Review/Revise state at which point the Author will no longer have edit capabilities. Authors are responsible for requesting publication review for that metadata from their Catalog Publisher.

InPort Readers - InPort Readers review catalog items through the Catalog Editor or log onto the InPort web site to search and view internally published catalog items. Readers do not have any edit abilities. Readers are responsible for reporting any metadata issues.

Person Information
Honorific - title of respect [Mr., Ms., Mrs., Rev., Dr., The Honorable, etc.]
Last Name - last name of the person
First Name - first name of the person
Mid. Inits. - middle initials of the person
Name Inits. - initials of the person
Email Address - contact email address
Contact Instructions - instructions on how best to contact the person
Business Hours - expected hours the person is available for contact
Voice Tel. - contact voice area code and phone number
FAX Tel. - contact fax area code and phone number
Address Type - type of the person's address. [Mailing or Physical]
Location Type - type of the person's location. [Residence, Business]
Street Address - the street number and name, including apartment number
Building Name - the building in which the person works
Room Number - the room number in which the person works
City - the city in which the person lives or works
State/Province - the state in which the person lives or works
Postal Code - the zip code for the person's residence or business
Country - the country in which the person lives or works
NOAA User ID - NOAA User ID of type Firstname.Middlename.Lastname
Job Title - the person's job title
Employer - the source of a person's salary
Emp. Type - employee type [Federal, Commissioned, Contractor, Function, Associate]
Mgr. User ID - manager's user ID of the form Firstname.Middlename.Lastname
Work Location - the primary business location for this person
Expertise - Field or fields in which the person has specialized training or experience
Routing Code- Employee mail routing code as listed in NOAA Locator
Org. Acronym - The acronym of the organization or agency that this person represents

Authorization
InPort Person's Signature- signature of the InPort Person
Date -date the Person signed this form
Authorizer's Signature- signature of the individual authorizing this form [Director, IT Manager, InPort Data Steward, etc.]
Date -date the authorizer signed this form
Authorizer's Role - role that entitles the signer to authorize this form [Director, IT Manager, InPort Data Steward, etc.]

Appendix E - InPort FAQs

Q. How should I show a version number of the data object that I am trying to catalog?

A. If you have multiple versions of a data set (or any other catalog item type), you should make sure that you include the version number in the *Title* and/or *Name* of the Catalog Item (*Item ID* tab of the **CATALOG EDITOR**). This implies that you will still have the previous version maintained in your InPort Library and that after publication, both versions of the catalog item will be returned in the InPort Search Results. Having the version number in the Title will allow the user performing the search to select the most appropriate version. By created a Related Item link between the two versions, anyone reviewing the details of one version would be able to drill over to the other version.

Appendix F - InPort Tutorials

These tutorials are designed to assist InPort users in developing and publishing an inventory of his/her organization's data collections. Completing an initial, high-level inventory of all data collections within an organization will allow organization directors, data managers, and scientists to begin assessing their data resource needs, recognize data gaps and/or redundancies, and encourage data re-use where possible.

A high-level data inventory should include the cataloging of all data projects and data sets. Details about the *who*, *when*, and *where* of the data and *how* of accessing the data are the minimum detailed information that is necessary to analyze the data inventory. See Appendix G for a listing of required FIS Data Inventory fields.

There is a greater range of detail that can be documented using the InPort tools; however, it is recommended that organizations begin with this level of detail and subsequently add more detail as the information is gathered.

Librarian Tutorial

Introduction

This tutorial is designed to show how an InPort Librarian can set up his/her organization's InPort metadata Library. It is assumed that the InPort Administrator has already initialized the Organization and Library and registered the organization's Data Steward and Librarian (at least one each), assigned their InPort User Roles and InPort accounts, and given the Librarian his/her password.

An InPort metadata Library is organized in a hierarchy or tree structure, which is determined by the child/parent relationship existing among all current catalog items. A child item can have only a single parent catalog item, but a parent item may have many child items. The Library object at the top or root of the tree. InPort Librarians create metadata project folders - as the main branches - directly below the Library. Just as real libraries have rooms, shelves, map-cases, and cabinets that contain their collections, InPort Libraries use catalog item type Project to be the containers or folders for information about data collections. Actual data collection projects can be organized under the various metadata Project folders in a way that best represents how those data collections are managed within the organization. It is important to note that InPort does not require that all Libraries be organized in the same way.

InPort is designed to allow data managers to document their data collections in a manner that is suitable to the organization's data management structure. A data management area typically has a data manager and frequently many separate data collections. One possible way to set up an InPort Library is to create a metadata Project folder for each data management area in the organization. The InPort Librarian can then create and assign InPort User Roles for the data managers in their respective InPort Projects. (See *Library Options* section below for other available functions).

An InPort Librarian uses three tools to set up an InPort Library:

1. Library Manager - to create, edit, move InPort Persons
2. User Roles Manager - to request, authorize or reject, deactivate or reactivate InPort Roles
3. User Manager - to create, lock, or unlock InPort database users

A fourth tool, the Catalog Editor, is used to create the Project folder which will hold the organization's metadata.

Note that throughout the tutorials, the Librarian may substitute the names of real people, organizations, libraries and real data associated with them in order to actually set up his/her Library. However, if the Librarian chooses to follow this tutorial as a training exercise, please prefix all titles, person last-names, and e-mail addresses with the user's initials (or some similar technique) in order to create unique organizations (title must be unique) and persons (e-mail address must be unique and user account name must be unique).

Only required field items are shown here. The user may, of course, choose to complete any other field items that are available on the presented tab screens.

For clarity, example field values are provided in brackets [`like this`]. Note, however, that some fields must be unique in the system (e.g., person's e-mail address and Library title), so the example data is not to be used.

Librarian Core Functions

1. Create Project portfolios (based on Data Management areas) to hold the metadata
2. Obtain User Role authorizations from a Metadata Steward for new Publishers, Authors, and Readers
3. Create InPort Persons
4. Create sub-organizations (optional)
5. Create InPort User Roles requests
6. Create InPort database User Accounts
7. Authorize or Reject User Role requests
8. Deactivate (or reactivate) InPort User Roles
9. Organize the InPort metadata Library in a coherent manner
10. Monitor InPort usage and completeness

Librarian Sets Up a Metadata Project Portfolio

This tutorial shows an example of how an InPort Librarian can set up an InPort Metadata Project Portfolio and create and assign users to create, edit, and publish metadata in that project. Each Metadata Project Portfolio should represent a specific data management area (group or division) in the organization.

For this example assume that the Librarian has a list of people within his/her organization that either will be entering or approving metadata or will be listed as having support roles for InPort Catalog Items. The Librarian will need to have those people fill out InPort Person Registration forms and for those that require InPort User Roles, forward them to the organization's Data Steward for signed authorization.

While waiting for the authorizations, the Librarian can create the metadata project portfolio(s), register the new Persons, and create the InPort User Role requests. As the InPort Data Steward returns the signed authorizations, the Librarian can create the Person's InPort User Account and Authorize the role request. Note that while the Data Steward is the actual Authorizer, it is the Librarian who processes that Authorization.

Librarian Logs into InPort

Access the InPort web site at http://iastrn.nmfs.hawaii.edu/inport/ The InPort home web page appears.

1. Click login in the upper right-hand corner of the screen. The Login to InPort page appears.
2. Log in as a user having the Inport Librarian role and insert a correct password. Click the Login link. The InPort Publishing page appears.
3. At the InPort Publishing page, click the InPort Catalog Tools link. Please be patient while the next screen appears. A teal-colored login screen, InPort Catalog Tools, appears.
4. When the InPort Catalog Tools Login form appears, enter your username and password again. Click the Logon button. The InPort Catalog Tools screen appears with several choices.
5. Clicking on one of the tool buttons will hide the Tools screen and open the selected application. Exiting the application will return the user to the Catalog Tools screen where the user can choose another application without having to login again.

Librarian Creates Metadata Projects

Using the **CATALOG EDITOR** tool, the Librarian will create two projects under his/her InPort Library. The Librarian will use these projects to demonstrate the functionality of InPort User Roles and catalog hierarchy development.

1. In the **CATALOG EDITOR**, highlight the organization's InPort Library in the navigator tree, right-click and select the Add Child Item command. A blank *Item ID* tab should appear on the *Editor* pane on right-hand side of the screen
2. In the *Item ID* tab, select **Catalog Item Type** `Project` from the pop-list. Enter the Title [`MyOrg Fisheries Dependent Metadata Portfolio`]. Click *Save* to ensure the record is saved. An abbreviated Project record is saved and the title appears in the navigator tree under the Library.
3. Repeat steps 1-2 to create **Catalog Item Type** `Project` with Title [`MyOrg Fisheries Independent Metadata Portfolio`].
4. Exit the **CATALOG EDITOR**

InPort Librarian Creates InPort Persons

Using the **LIBRARY MANAGER** tool, the Librarian creates users - InPort Persons - that are required either for InPort User Roles (e.g., Author, Publisher, Reader) or for Catalog Support Roles (e.g., Point-of-Contact, Data Manager, Developer).

1. Complete an InPort User Registration form for each user for the specified role. Person who will serve only in catalog item Support Roles do not require a signature.
2. In the **LIBRARY MANAGER**, highlight the Organization in the navigator tree and right-click to select the New Person command from the menu.
3. Create a person to serve as an InPort Author. In the *Editor* pane, enter the following information for the new person: (1) **Last Name** [`Mypers`]; (2) **First Name** `Myauth`; (3) **Email Address** [`Myauth.Mypers@mytest.tst`]
4. Click Save to save the record. Status bar displays *Transaction complete* message indicating the record was saved. The person's name appears in the navigation tree.
5. Create a person to serve as an InPort Publisher. Complete Steps 1-4 for another person with information: (1) **Last Name** [`Mypers`]; (2) **First Name** [`Mypub`]; (3) **Email Address** [`Mypub.Mypers@mytest.tst`]
6. Create a person to serve in an InPort Support Role. Complete Steps 1-4 for another person with information: (1) **Last Name** [`Mypers`]; (2) **First Name** [`Mysupp`]; (3) **Email Address** [`Mysupp.Mypers@mytest.tst`]

InPort Librarian Creates InPort User Role Requests

Using the **CATALOG EDITOR** tool, the Librarian creates InPort User Role requests for a specific Catalog Project within the Library. This step can be done prior to signatures authorizing or rejecting the User Role request. Note that the **USER ROLE MANAGER** can also be accessed via the **LIBRARY MANAGER** by selecting a Person, however, in the context of setting up Roles for specific Library Projects, it makes logical sense to do this step from the **CATALOG EDITOR**.

1. In the **CATALOG EDITOR**, highlight the Project [`MyOrg Fisheries Dependent Metadata Portfoli`]
2. Select the *Project* tab in the *Editor* pane
3. Click on the *User Roles* button
4. The **CATALOG EDITOR** tool will be replaced by the **USER ROLE MANAGER** tool. The project selected in the **CATALOG EDITOR** will be the highlighted item in the *Navigator* pane.
5. Immediately below the highlighted project, click on ROLE Author. Click on the *New Request* button or right-click and select the New Request command from the menu
6. The **Catalog Role** field and **Request Date** will automatically be filled. Following the Tip Text at the bottom of the screen, select the person requesting to be an InPort Author from the **InPort User** pop-list and the **Expected Authorizer** from that pop-list. Enter **Request Notes** if desired.
7. Click Save to save the request and re-enable the Navigator pane.

8. Repeat Steps 5-7 for a Publisher.

InPort Librarian Creates InPort User Accounts

Once the InPort Library Data Steward signs the authorization for an InPort User Role, the Librarian may create an InPort User Account. As these authorizations may be received individually, it makes sense to access the **USER MANAGER** tool via the **LIBRARY MANAGER**, however, this tool is also available via the **INPORT ROLE MANAGER** so the Librarian could choose to create the InPort User Accounts during the authorization process. Note that an InPort Role request may not be authorized until the Person has an InPort User Account.

1. In the **LIBRARY MANAGER**, locate and highlight the Person [Mypers, Myauth] in the *Navigation* pane
2. Click the *InPort User Roles* tab to display the Person's Role information.
3. Click the *User Mgmt.* button near bottom of screen; the InPort **USER MANAGER** screen appears
4. Enter **Username** [AUTH_MYPERS] and **Password** and matching **Confirm Password** values (Librarian's choice - users will be able to change their passwords via the InPort web site).   Click the *Create* button; click Yes in the confirmation box and OK to acknowledge operation success
5. Click the *Exit* button to return to the **LIBRARY MANAGER**
6. Repeat Steps 1-5 for [Mypers, Mypub] (username [PUB_MYPERS])

InPort Librarian authorizes (or rejects) User Roles

1. In the **LIBRARY MANAGER**, locate and highlight the Person [Mypers, Myauth] in the *Navigation* pane
2. Click the *InPort User Roles* tab to display the Person's Role information
3. Select the Person's Pending request and then click the *Edit/View Role* button
4. The **USER ROLE MANAGER** should open and have the Person's role request record selected
5. Select the Data Steward that has authorized the request from the **Auth/Rej By** list. This will lock the *Navigator* pane until the authorization is saved or cancelled
6. Click on the *Authorize* button to complete the role request, or click on *Cancel* to abort the operation.
7. Click the *Save* button to complete the process and re-enable the *Navigator* pane
8. Click the *Exit* button to return to the **LIBRARY MANAGER**
9. Repeat Steps 1-8 for [Mypers, Mypub] (username [PUB_MYPERS])

Librarian Catalog Administration Tasks

Besides adding more InPort User and Support Persons, the Librarian may need to deactivate previously authorized Roles, update Person information, assign InPort Persons to other organizations or even move a Person to another organization. Each of those tasks is described in this User Guide (see the Table of Instructions for a full list of detailed *How To* procedures).

InPort Librarians serve not just as managers but also as mentors of metadata. Just as traditional librarians monitor the use of their libraries, InPort Librarians need to monitor the use and completeness of their InPort Libraries. InPort Librarians are the local experts, not only on the use of InPort, but most importantly on the gathering and publication of metadata for their organization.

Library Options

InPort Librarians may choose to create sub-organizations which would serve to represent their internal organization structure. Just as people work for a common top-level organization but are assigned to departments or sub-organizations, for the most flexibility, it is recommended (but not required) that Librarians register their InPort Persons above any possible sub-organizations they choose to create. Librarians can then create Organization Assignments for any InPort Persons to those sub-organizations. Note that Persons created under sub-organizations will require an Organization Assignment to the top-level organization - the InPort Organization associated with the InPort Library - in order to have those Persons available for InPort User Roles within the Library (i.e., availability for User Roles trickles down but not up from where the Person record was created).

Author Tutorial

InPort Authors are the primary users of the **CATALOG EDITOR** tool. Authors enter, review, and correct metadata that is in the Draft workflow state. Authors are able to create child catalog items and be able to edit catalog items while they are in Draft workflow state.

Once an Author feels that he/she has completed entry of metadata for a Catalog Item, he/she will put that item into the Review/Revise state at which point the Author will no longer have edit privileges. Authors will then request that their InPort Publisher review the metadata.

Author Core Functions

1. Create Catalog Items
2. Edit Catalog Items during the Draft workflow state
3. Advance workflow state to Review/Revise

Author Catalogs the Organization's Data Projects

This tutorial shows a practical example of how an InPort Author can catalog his/her organization's data collections under his/her assigned InPort Catalog Metadata Project portfolio. Using catalog item types Project and Data Set, metadata authors can produce a timely, high-level data inventory of the organization's data collections. Additional details on those data collections can be added in subsequent passes. This approach will provide scientists and managers the basic information required for data discovery, gap analysis, and resource decision-making. For clarity, example field values are provided in brackets [`like this`]. Field item names that begin with an asterisk, (e.g., ***Title**) are required items that must be entered in order to save the record.

InPort Author Catalogs a Data Collection Project

Using the **CATALOG EDITOR** tool, the Author creates a Project under his/her InPort Metadata Project portfolio. Note that a Catalog Item of type Project may describe a project, program, task, activity, or set of related items.

1. In the **CATALOG EDITOR**, highlight the catalog item in the *Navigator* pane, [`MyOrg Fisheries-Dependent Metadata Portfolio`], that will be the parent of the new data collection project
2. Right-click and select Add Child Item command. A blank *Item ID* tab should appear on the *Editor* pane on right-handed side of the screen
3. In the *Item ID* tab, select `Project` from the ***Catalog Item Type** pop-list
4. Enter a **Name** [`FW Observer`]. Note that **Name** is optional and may be the same or different from the **Title**. Many information items have a long name like a *Title* and a short common *Name*
5. Enter the formal ***Title** [`Far West Observer Data System`] of this project
6. Select a **Status** [`In Work`] from the list
7. Enter an **Abstract** that describes the project. A well written abstract is an important tool in metadata discovery as it is one of the primary fields used in the InPort Search. The abstract should clearly reference the specific subject and unique dimensions of the resource being documented. As with other text fields in InPort, the user can cut/paste information from a text document (e.g., MS Word), into the field. The user can also bring up the editor box on this or any other text field by typing Ctrl-E after the cursor is clicked in the text field
8. Enter the **Purpose** or intent of this project. Is the project in support of research or legislation?
9. Enter any supplementary information and notes in the **Suppl. Info/Notes** field. This field can be used for information that does not easily fit elsewhere in the InPort model
10. Enter any Theme Keywords [`observer, longline, fishery dependent data`]. Separate keywords or keyword phrases by commas
11. Enter any Place Keywords [`Pacific Ocean, American Samoa`]
12. Enter any Temporal Keywords [`continuous`]
13. Enter any Stratum Keywords [`oceanic, pelagic`]
14. In the *Catalog Item Physical Location* area, select an Organization or Building from the **Organization** list. After selecting and organization, the **City**, **State/Province** and **Country** fields will be populated if those items are available. The user may choose to edit those fields if desired
15. Enter a Location Description if that is necessary [`Observer Room`]
16. Click on the *Project* tab to display the *Project Details*. Changing tabs in the Catalog Editor will cause an automatic save of any changes. Of course, the user may click the Save button at any time in creating or editing

17. On the *Project* tab, select or type in a **Project Type** [Data Collection]
18. For data collections, complete the following steps
19. Check the **Mandated** check box if this project was required by law or other regulation, and if so, enter the mandating legislation or regulation in the **By** field [MSA]
20. Select a **Collection Type** from the list [Observer]
21. Select a **Collection Authority** from the list [Federal]
22. Select or enter the **Collection Method**(s) used to collect the data in this Project [Electronic, Paper]
23. Click *Save* to ensure the record is saved
24. Exit the **CATALOG EDITOR** or continue with the tutorial

InPort Author Catalogs a Data Set

Using the **CATALOG EDITOR** tool, the Author creates a Data Set under the data Project that manages that data set. Note that a Catalog Item of type Data Set may describe a database, a collection of related data files or some other user defined collection.

1. In the **CATALOG EDITOR**, highlight the catalog item in the *Navigator* pane, [Far West Observer Data System], that will be the parent of the new data set
2. Right-click and select Add Child Item command. A blank *Item ID* tab should appear on the *Editor* pane on right-hand side of the screen
3. In the *Item ID* tab, select Data Set from the ***Catalog Item Type** pop-list
4. Enter a **Name** [FWODS Database]. Note that **Name** is optional and may be the same or different from the **Title**. Many information items have a long name like a *Title* and a short common *Name*
5. Enter the formal ***Title** [Far West Observer Database] of this project
6. Select a **Status** [In Work] from the list
7. Enter an **Abstract** that describes the project. A well written abstract is an important tool in metadata discovery as it is one of the primary fields used in the InPort Search. The abstract should clearly reference the specific subject and unique dimensions of the resource being documented. As with other text fields in InPort, the user can cut/paste information from a text document (e.g., MS Word), into the field. The user can also bring up the editor box on this or any other text field by typing Ctrl-E after the cursor is clicked in the text field
8. Enter the **Purpose** or intent of this data set. This field is optional and may or may not be identical to the parent catalog item's purpose
9. Enter any supplementary information and notes in the **Suppl. Info/Notes** field. This field can be used for information that does not easily fit elsewhere in the InPort model
10. Enter any **Theme Keywords** [observer, longline, fishery dependent]. Separate keywords or keyword phrases by commas
11. Enter any **Place Keywords** [Pacific Ocean, American

Samoa]

12. Enter any **Temporal Keywords** [continuous]
13. Enter any **Stratum Keywords** [oceanic, pelagic]
14. In the *Catalog Item Physical Location* area, select an Organization or Building from the **Organization** list. After selecting and organization, the **City**, **State/Province** and **Country** fields will be populated if those items are available. The user may choose to edit those fields if desired. Optionally, if the physical location is the same as the parent catalog item, click on the *X* button
15. Enter a Location Description if that is necessary [FW IT Room]
16. Click on the *Data Set* tab to display the *Data Set Details*. Changing tabs in the Catalog Editor will cause an automatic save of any changes. Of course, the user may click the *Save* button at any time
17. On the *Data Set* tab, select or type in a **Data Set Type** [Database]
18. Select a **Data Set Maintenance Frequency** from the list. This describes the frequency with which changes and additions are made to the data set (e.g., Continuous, Weekly, Quarterly) [Continuous]
19. Enter a **Data Set Entity - Attribute Overview.** This should describe the different kinds of information contained in the data set, in summary form
20. If there is a publication or reference that provides a complete description of the entities, including column names and formats, enter a **Data Set Entity - Attribute Detailed Citation.** This document may also be cataloged more fully as a child Document of this Data Set
21. If there is a link or URL to the above reference, end it in the Attribute Detailed Citation URL. This URL may also be described using the URL Details Module
22. A **Source Media Type** may be defined, if appropriate
23. Click *Save* to ensure the record is saved
24. Exit the **CATALOG EDITOR** or continue with the tutorial

InPort Author Catalogs a Document

InPort provides a convenient way for users to organize and describe their documents that are related to their data collections. All InPort catalog item types can have child Documents. Users may wish to create InPort Project folders - much like a file system - under which they can catalog like documents (e.g., create an InPort Project titled [Observer Quarterly Reports] that is itself a child item of their [Observer Data System]. The user could then describe the *Set of...* quarterly reports and catalog each as child items under that *Project* folder. This method would allow the user to have multiple document folders where each document folder can be fully described.

Using the **CATALOG EDITOR** tool, the Author creates a Document under the data set.

1. In the **CATALOG EDITOR**, highlight the catalog item in the *Navigator* pane, [Far West Observer Data System],

that will be the parent of the new document

2. Right-click and select Add Child Item command. A blank *Item ID* tab should appear on the *Editor* pane on right-hand side of the screen
3. In the *Item ID* tab, select `Document` from the ***Catalog Item Type** pop-list
4. Enter a **Name** [`FWODS_2005_annual.doc`]. Note that **Name** is optional and may be the same or different from the **Title**. This example shows the use of the actual name of the physical document.
5. Enter the formal ***Title** [`Far Western Observer 2005 Annual Report`] of this document
6. Select a **Status** [`Completed`] from the list
7. Enter an **Abstract** that describes the document. A well written abstract is an important tool in metadata discovery as it is one of the primary fields used in the InPort Search. The abstract should clearly reference the specific subject and unique dimensions of the resource being documented. As with other text fields in InPort, the user can cut/paste information from a text document (e.g., MS Word), into the field. The user can also bring up the editor box on this or any other text field by typing Ctrl-E after the cursor is clicked in the text field
8. Enter the **Purpose** or intent of this document. This field is optional and may or may not be identical to the parent catalog item's purpose
9. Enter any supplementary information and notes in the **Suppl. Info/Notes** field. This field can be used for information that does not easily fit elsewhere in the InPort model
10. Enter any Theme Keywords [`observer, longline, fishery dependent`]. Separate keywords or keyword phrases by commas
11. Enter any Place Keywords [`Pacific Ocean, American Samoa`]
12. Enter any Temporal Keywords [`continuous`]
13. Enter any Stratum Keywords [`oceanic, pelagic`]
14. In the *Catalog Item Physical Location* area, select an Organization or Building from the **Organization** list. After selecting and organization, the **City**, **State/Province** and **Country** fields will be populated if those items are available. The user may choose to edit those fields if desired
15. Enter a Location Description if that is necessary [`FW IT Room`]
16. Click on the *Document* tab to display the *Document Details*. Changing tabs in the Catalog Editor will cause an automatic save of any changes. Of course, the user may click the Save button at any time in creating or editing
17. On the *Document* tab, select or type in a **Publication Date** [`30-JAN-2005`]
18. Select a document **Type** [`Reference`]
19. Select a document **Format** [`Microsoft Word]`
20. Enter a **Format Version** [`MS-Office Word 2003`]
21. Select a **Document Status** [`In Review`]

Author Adds Details to Catalog Items

Using the **CATALOG EDITOR** tool, the Author adds more detailed information to the data collection project.

InPort Author Adds URLs to a Data Collection Project

Adding URLs to catalog items will make it easy for InPort searchers to drill over to web sites that support the project or item being documented.

1. In the **CATALOG EDITOR**, highlight the catalog item in the *Navigator* pane, [`Far West Observer Program`]
2. Click on the *URLs* tab
3. Enter a *URL [`http://fwpfsc.noaa.gov/ll_obs`]. Note that it is good form to validate the URL with a browser and then copy/paste it into the URL field
4. Enter a Description of the URL [`Web site describing the FWOP and providing access to FWOP documentation and resources`]
5. Click *Save* to ensure the record is saved

InPort Author Adds Time Frames to a Data Collection Project

Time Frame information is important for both data discovery and for recognizing data gaps should they occur. Time Frame information may be a discrete event time, a start time, a range of times (begin and end time), or some alternative of time (e.g., beginning and ending Trip Number) that defines the temporal bounds of the catalog item. Multiple time frame definitions may be defined and descriptions can be added for clarification.

1. In the **CATALOG EDITOR**, highlight the catalog item in the *Navigator* pane, [`Far West Observer Program`]
2. Click on the *Time Frames* tab
3. Enter a **Start Time** [`01-JAN-1994 12:20`] and **End Time** [`30-APR-2002 15:25`]
4. Select the **Time Type** [`Range`]
5. Enter an **Alternate Start as of Info** [`Trip No. 1`] and an **Alternate End as of Info** [`Trip No. 243`]
6. Enter a **Description** of the new time frame [`Date entry into rBASE system`]
7. Create a second Time Frame record with only a **Start Time** [`01-MAY-2003 08:15`] and select **Time Type** [`Continuous`]
8. Enter a **Description** of the new time frame [`Date entry into Oracle`]
9. Click *Save* to ensure the record is saved

InPort Author Adds Geographic Area Details to a Project

The Geographic Area or bounds of the data collection can be described by both latitude and longitude boundaries and by a **Geographic Area Description**. Like Time Frames, Geographic Area information is important for data discovery and for recognizing data gaps should they occur. Longitude and latitude are specified in decimal degrees with north latitudes positive and south negative, east longitude positive and west negative.

1. In the **CATALOG EDITOR**, highlight the catalog item in the *Navigator* pane, [Far West Observer Program]
2. Click on the *Geographic Area* tab
3. Enter a **E Bound** (eastern boundary) longitude [150.5]
4. Enter a **W Bound** (western boundary) longitude [-160.33]
5. Enter a **N Bound** (northern boundary) latitude [30]
6. Enter a **S Bound** (southern boundary) latitude [-30]
7. Enter a **Geographic Area Description** [Rectangular area around American Samoa]
8. Click *Save* to ensure the record is saved

InPort Author Adds Support Roles to a Project

Many people serve support roles for data collections. Data Stewards, Database Developers, Data Managers, Points-of-Contact, etc., all contribute to the understanding, maintenance, and access of the data. At a very minimum, every catalog item should have a Point-of-Contact support role listed.

1. In the **CATALOG EDITOR**, highlight the catalog item in the *Navigator* pane, [Far West Observer Program]
2. Click on the *Support Roles* tab
3. Select a ***Support Role** type from the list [Point of Contact]
4. Enter the date the role became effective in ***Date Effective From** [01-JAN-1994 00:00]
5. Enter the date the role ended in **Date Effective To** [15-APR-2002 00:00]
6. Select a registered InPort Person from the Person list [Michener, James]
7. Note that selecting a Person will automatically populate the Person's **Organization** name
8. Enter any **Contact Instructions** that clarify how best to contact the person in the support role [email or work phone during business hours]
9. Click *Save* to ensure the record is saved

InPort Author Adds Data Access Details to a Data Set

Data Access details will provide information about the methods and constraints of accessing the data represented by the catalog item. Every data set cataloged in InPort should have details on the security/confidentiality of the data and specify any restrictions on who can or cannot access the data in question.

1. In the **CATALOG EDITOR**, highlight the catalog item in the *Navigator* pane, [Far West Observer Data Set]
2. Click on the *Access* tab
3. Select a ***Security Class** from the list [Confidential]
4. Enter the Access Constraints. There are restrictions and legal prerequisites for accessing the data set, including any access constraints applied to assure privacy or intellectual property and any restrictions on the use of the data. [Contact FWPFSC Data Manager for details (999) 123-4567. Data must be binned in 5 degree squares and meet

a 3 boat minimum]

5. Other detail fields are available for documenting the Access and Security of the data and may be completed, however, the above two fields are the minimum required for data inventory
6. Click *Save* to ensure the record is saved

Author Completes Initial Metadata Entry

Once an InPort Author completes a catalog item (or a convenient set of catalog items), it is time to change the catalog item **Workflow State** to *Review/Revise* from the initial *Draft* state. An Author will not be able to make any changes to catalog items that are not in Draft though, if necessary, the InPort Publisher may revert the catalog item back to Draft for further editing by the Author. Changing the item to Review/Revise is an indication that the item is ready for review by the Publisher for potential approval and publication

InPort Author Changes Workflow Status

Using the **CATALOG EDITOR** tool, the Author changes the catalog item's workflow state to Review/Revise. In many cases, the user may choose to propagate the workflow state change down to all the selected item's children. Refer to Chapter 5 - Catalog Publishing for complete details. For this example, the selected catalog item and its child catalog items will change from *Draft* to *Review/Revise*.

1. In the **CATALOG EDITOR**, highlight the catalog item in the *Navigator* pane, [Far West Observer Project]
2. In the top menu bar choose the REPORTS>HIERARCHY REPORT command to show the names and states of all child items
3. In the **CATALOG EDITOR** tool, click on the *Catalog Details* tab
4. Select *Review/Revise* from the **Metadata Workflow State** list
5. Answer *Yes* to *Do you want to update any child items?*
6. In the top menu bar choose the REPORTS>HIERARCHY REPORT command to show the names and states of all child items and confirm that child item workflow states were changed
7. The Author should notify his/her InPort Publisher that the catalog items are ready for review.

Publisher Tutorial

InPort Publishers are responsible for reviewing, correcting, publishing and/or withdrawing catalog items.

Publisher Core Functions

1. Review metadata for completeness and accuracy
2. Approve Catalog Item metadata
3. Publish Catalog Items
4. When necessary, withdraw Catalog Items from publication
5. If necessary, place Catalog Items back in Draft state so that an InPort Author may complete/correct metadata

Publisher Manages Catalog Item Publication

InPort Publishers are responsible for ensuring that all published metadata is, to the best of their knowledge, accurate, objective, and complete.

InPort Publisher Reviews and Approves Catalog Items

Using the **CATALOG EDITOR** tool, the Publisher reviews and, if necessary, makes corrections/additions to metadata for catalog items. To ensure that each and every catalog item is reviewed individually, a Publisher must Approve catalog items on an item by item basis. After confirming the completeness and accuracy of the metadata for a catalog item, the Publisher changes the catalog item's workflow state from *Review/Revise* to *Approved*.

1. In the **CATALOG EDITOR**, highlight the catalog item in the *Navigator* pane, [`Far West Observer Project`]
2. Publisher reviews the catalog item metadata and confirms that it is complete and accurate
3. In the top menu bar choose the REPORTS>HIERARCHY REPORT command to show the names and states of all child items
4. In the **CATALOG EDITOR** tool, click on the *Catalog Details* tab
5. Select *Approved* from the **Metadata Workflow State** list
6. Repeat steps 1-4 for each completed catalog item
7. In the top menu bar choose the REPORTS>HIERARCHY REPORT command to show the names and states of all child items and confirm that child item workflow states were changed

InPort Publisher Publishes Catalog Items

Using the **CATALOG EDITOR** tool, the Publisher can publish (internally or externally) any catalog items that are currently in *Approved* workflow state. Note that InPort Authors may still be creating and editing child catalog items of these ready-to-be-published items. Only items that are currently *Approved* will be available for publication.

1. In the **CATALOG EDITOR**, highlight the catalog item in the *Navigator* pane, [`Far West Observer Project`]
2. In the top menu bar choose the REPORTS>HIERARCHY REPORT command to show the names and states of all child items
3. In the **CATALOG EDITOR** tool, click on the *Catalog Details* tab
4. Select *Published-External* from the **Metadata Workflow State** list
5. Answer *Yes* to *Do you want to update any child items?*
6. In the top menu bar choose the REPORTS>HIERARCHY REPORT command to show the names and states of all child items and confirm that child item workflow states were changed
7. Within a few minutes, the newly published catalog items should appear in any appropriate InPort Search via the InPort web site. If the Publisher had chosen to Publish-Internal, InPort users would need to log into the InPort web site before searching for the new items.

Appendix G- FIS Data Inventory

FIS Data Inventory - Mandatory Elements by Catalog Item Type			
The FIS Fisheries-Dependent Data* Inventory is to be completed by each fisheries office / fisheries partner using the web-based InPort Metadata Catalog (see below for website). This inventory is the first phase of metadata data entry. For each catalog item type, the required data fields are listed. The required data fields answer the who, what, when and where questions about the data. Note, however, that the only mandatory catalog item type is Data Set; Projects should be used to help organize the Data Sets; and Documents, Data Entities and Procedures are optional in this first phase. As time and funds permit, other data sets (i.e., fisheries-independent data) and more in-depth metadata (for example, table and column descriptions) can be entered. Documenting fisheries data is an ongoing process, and it is expected that entering metadata into InPort will be a continuous activity. InPort Website: https://ias.pifsc.noaa.gov/inport/ * A definition of "fisheries-dependent" is given at the bottom of this table			
Catalog Item Type	**Data Entry Item**	**What to Enter**	**Detailed Description**
Project (optional)			
	Catalog Item Type	Select "Project" from pull-down list	
	Title	Title of the project	The title of the Project should be as descriptive as possible, employing terms that clearly identify the specific subject and unique contents of the project. This field will be included in InPort website searches.
	Abstract	Detailed description of the project	The abstract should clearly reference the specific subject and unique dimensions of the Project being documented, along with explicit consideration of major scientific concepts, keywords, and other descriptive terms to aid system users in searching through other InPort Catalog Items and identifying relevant ones. This field will be included in InPort website searches.
	Keywords	Include Theme keywords, Place keywords, Temporal keywords and Stratum keywords	Consult InPort Catalog Editor Help for further details. These fields will be included in InPort website searches.
	URL	Location of the document on the web (if available)	Online (internet) references to the Project. Give the exact URL to online references for this project.
	Time Frame	Start Time or Range of Dates	The date when the Project began or the date range in which the Project occurred

	Geographic Area	Geographic Bounds or Geographic Area Description	Enter the geographic bounds (N, S, E, W) in decimal degrees to the precision available; format: real numbers; for latitude, numbers may range from -90.0 to 90.0; for longitude, numbers may range from -180.0 to 180.0. For data sets that include a complete band of latitude around the earth, the East Bounding Coordinate should be assigned the value 180.0; the West Bounding Coordinate should be assigned the value -180.0
	Support Role	Point of Contact (Person or Organization), Date Effective	List the person or persons who can provide further information about this project. List the date (DD-MON-YYYY format) this person's role became effective.
Catalog Item Type	**Data Entry Item**	**What to Enter**	**Detailed Description**
Data Set (required)			
	Catalog Item Type	Select "Data Set" from pulldown list	
	Title	Phrase describing the data set	The title of the data set should be as descriptive as possible, employing terms that clearly identify the specific subject and unique contents of the data set. Include geographic or regional identifiers to distinguish, say, Hawaii logbook data from SW logbook data. This field will be included in InPort website searches.
	Abstract	Detailed description of the data set	The abstract should clearly reference the specific subject and unique dimensions of the Data Set, along with explicit consideration of major scientific concepts, keywords, and other descriptive terms to aid system users in searching through other InPort Catalog Items and identifying relevant ones. This field will be included in InPort website searches.
	Keywords	Include Theme keywords, Place keywords, Temporal keywords and Stratum keywords	Consult InPort Catalog Editor Help for further details. These fields will be included in InPort website searches.
	URL	Location of the data on the web (if available)	Online (internet) references to the Data Set. Give the exact URL to online references for this data set.
	Time Frame	Start Time or Range of Dates	The date (DD-MON-YYYY format) when the Data Set began to be collected or the date range in which the data was collected
	Geographic Area	Geographic Bounds or Geographic Area Description	Enter the geographic bounds (N, S, E, W) in decimal degrees to the precision available; format: real numbers; for latitude, numbers may range from -90.0 to 90.0; for longitude, numbers may range from -180.0 to 180.0. For data sets that include a complete band of latitude around the earth, the East Bounding Coordinate should be assigned the value 180.0; the West Bounding Coordinate should be assigned the value -180.0

	Support Role	Point of Contact (Person or Organization), Date Effective	List the person or persons who can provide further information about this Data Set. List the date (DD-MON-YYYY format) this person's role became effective
	Data Set Type	Select "Mixed", "Flat files", "Database" or "Other" from pulldown list or enter a new type	
	Maintenance Frequency	Select from choices in pulldown list	How often is the data updated? Select from: Continuously, Daily, Weekly, Monthly, Quarterly, Yearly, As Needed, Irregularly, Unknown, None Planned
	Entity Attribute Overview	Detailed description of the components of the data set	Describe the data set you are documenting. For this inventory, it is not necessary to list tables and column descriptions unless time and funds allow
Catalog Item Type	**Data Entry Item**	**What to Enter**	**Detailed Description**
Document (optional)			
	Catalog Item Type	Select "Document" from pulldown list	
	Title	Title of the document	The title of the Document should be as descriptive as possible, employing terms that clearly identify the specific subject and unique contents of the document. This field will be included in InPort website searches.
	Abstract	Detailed description of the document	The abstract should clearly reference the specific subject and unique dimensions of the Document, along with explicit consideration of major scientific concepts, keywords, and other descriptive terms to aid system users in searching through other InPort Catalog Items and identifying relevant ones. This field will be included in InPort website searches.
	Keywords	Include Theme keywords, Place keywords, Temporal keywords and Stratum keywords	Consult InPort Catalog Editor Help for further details. These fields will be included in InPort website searches.
	URL	Location of the data on the web (if available)	Online (internet) references to the Document. Give the exact URL to online references for this document.
	Time Frame	Not required for documents; use Publication Date below instead	

	Geographic Area	Geographic Bounds or Geographic Area Description	Enter the geographic bounds (N, S, E, W) in decimal degrees to the precision available; format: real numbers; for latitude, numbers may range from -90.0 to 90.0; for longitude, numbers may range from -180.0 to 180.0. For data sets that include a complete band of latitude around the earth, the East Bounding Coordinate should be assigned the value 180.0; the West Bounding Coordinate should be assigned the value -180.0
	Support Role	Point of Contact (Person or Organization), Date Effective	List the person or persons who can provide further information about this document. List the date (DD-MON-YYYY format) this person's role became effective
	Publication Date	Date the document was published	
Catalog Item Type	**Data Entry Item**	**What to Enter**	**Detailed Description**
Data Entity (optional)			This catalog item type is not required for the FIS Data Inventory
Procedures (optional)			This catalog item type is not required for the FIS Data Inventory
Definitions of *Fisheries-Independent* and *Fisheries-Dependent* Data			
There are two types of fisheries data collected by NMFS: fishery-independent and fishery-dependent data. Fishery-independent data are obtained by NOAA through surveys and research conducted by federal, state, and university scientists; these data are collected "independent" of fishing activities and use scientific sampling methods. Fishery-dependent data are gathered from both commercial and recreational fishermen and processors through log books, trip tickets and landing bills. They are also collected by state and federal agencies (or their contractors), through dockside intercepts (for both commercial and recreational fishermen), through telephone surveys that relate to recreational fishing activities (e.g., Marine Recreational Fisheries Statistical Survey), through telephone surveys that gather socio-economic information, and through observer programs that provide detailed commercial catch, effort, and bycatch data. Fishery-dependent data from recreational fisheries are essential for assessing the mortality and other stresses that result from fishing. These data provide a direct measure of the effectiveness of management and regulations.			

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