



InPort

Quick Start Guide



NOAA
FISHERIES

Introduction to InPort

a. How InPort works

The InPort Metadata Catalog gives NOAA Fisheries, the National Ocean Service (NOS), and their state and regional partners the capability to store, search, and share essential information about their data holdings. It was originally described in 2003 and was funded in May 2004 under the Fisheries Information System (FIS) Program.

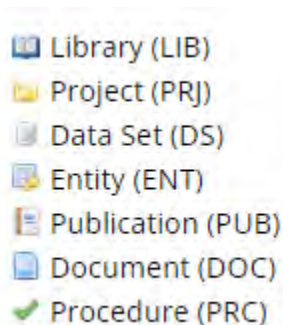
b. Background

InPort (**I**nformation **P**ortal) stores metadata -- information about data -- which is needed to discover, understand, and use data. It does not store the data itself. 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.

c. Organization of Catalog Items

Within InPort, there are three Organization Groups that maintain metadata: National Marine Fisheries Service (NMFS), National Ocean Service (NOS), and their state and regional partners. Each organization maintains its own collection of metadata, referred to within InPort as a **Library**. Within the library, metadata is often separated into individual program offices or topical folders so that data managers or submitters can have clear access to their metadata. The metadata contained within a Library is hierarchically organized to facilitate discoverability and maintainability.

Metadata records in InPort are called Catalog Items, and consist of the following types:



Library: The Metadata Library is a special Catalog Item that represents all the currently cataloged data collection activities of an Organization. Librarians for each Organization within InPort are listed on the Organization Info page.

Project: An InPort Project is a folder in which datasets, entities, publications, documents, and procedures are sorted under. A project is not required; however, it may help the dataset manager keep their metadata organized.

Data Set: A dataset is the metadata record that the dataset manager enters into InPort. This record will be harvested into the NOAA data catalog, as well as data.gov. There are several workflow statuses the dataset may be in which allows the record to be viewed by varying levels of internal and external users.

Entity: Entities can be found within an InPort dataset. The types of entities supported in InPort are data file, data table, report, spreadsheet, data view, GIS file, form (collection or entry), XML document, or other. Entities include attribute information for the dataset.

Publication: A publication can include items such as an abstract, book, external presentation, report, web content, etc. that was written with the use of a dataset.

Document: A document can include such items as a 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, and specifications.

Procedure: A procedure item consists of data collection procedure, interview procedure, data submission procedure, and quality control procedure among others.

User Roles and Responsibilities

To author and contribute metadata for a library to InPort, you must have an InPort account with appropriate privileges. Please contact your organization's Librarian to be set up with a new user account with the privileges appropriate for your data management responsibilities.

Role	Explanation
Reader	May Read Records
Author	May Read and Write Records <i>*Most common user role</i>
Publisher	May Read and Write and Publish Records
Librarian	May Read, Write, and Publish Records within an InPort Library and create accounts and assign privileges with an InPort library

System Administrator	<p>May Read, Write, and Publish Records within all InPort Libraries and create accounts and assign privileges within all InPort Libraries.</p> <p>May copy users from one InPort Library to another. May create InPort Libraries</p>
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Workflow States

- a. InPort metadata flows through several different states on the way to being published. It can also remain internal and unpublished.
- b. Not all workflow states are accessible directly from each other. Only valid states will be shown in the select list. The general path is below, records can move forward and backward on this path.
 - i. Draft → Review / Revise → Approved → Publish

Workflow State	Definition	Possible Next Workflow State(s)								
Draft	This is the initial workflow state of a record. Those with an author or higher role may edit the record.	<table border="1"> <tr> <td>Next workflow state</td> <td>Reason</td> </tr> <tr> <td>Review / Revise</td> <td>Catalog Item is ready for higher level review</td> </tr> </table>	Next workflow state	Reason	Review / Revise	Catalog Item is ready for higher level review				
Next workflow state	Reason									
Review / Revise	Catalog Item is ready for higher level review									
Review / Revise	The author of the record has indicated that the metadata entered for the catalog item is correct and has submitted the record for higher level review.	<table border="1"> <tr> <td>Next Workflow State</td> <td>Reason</td> </tr> <tr> <td>Draft</td> <td>Metadata record needs more edits per publisher</td> </tr> <tr> <td>Approve</td> <td>Metadata on catalog item is now ok</td> </tr> </table>	Next Workflow State	Reason	Draft	Metadata record needs more edits per publisher	Approve	Metadata on catalog item is now ok		
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Draft	Metadata record needs more edits per publisher									
Approve	Metadata on catalog item is now ok									
Approved	Someone with a publisher or higher role has indicated that the metadata provided for the catalog item in question is correct and its contents are now frozen, because the catalog item has now been approved for publication, but has not yet been published.	<table border="1"> <tr> <td>Next Workflow State</td> <td>Reason</td> </tr> <tr> <td>Review / Revise</td> <td>Metadata Record Needs Revision</td> </tr> <tr> <td>Publish Internal</td> <td>Catalog item/metadata record can now be viewed by all of those known to InPort.</td> </tr> <tr> <td>Publish External</td> <td>Catalog item/metadata record can now be viewed by the public</td> </tr> </table>	Next Workflow State	Reason	Review / Revise	Metadata Record Needs Revision	Publish Internal	Catalog item/metadata record can now be viewed by all of those known to InPort.	Publish External	Catalog item/metadata record can now be viewed by the public
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Publish Internal	Record/catalog item is now viewable and searchable by those with an InPort login.	<table border="1"> <tr> <td>Next workflow state</td> <td>Reason</td> </tr> <tr> <td>Withdrawn</td> <td>Record is removed from publication either in contemplation of revision or because an ancestor (parent, grandparent etc) record will require revision</td> </tr> </table>	Next workflow state	Reason	Withdrawn	Record is removed from publication either in contemplation of revision or because an ancestor (parent, grandparent etc) record will require revision				
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Published External	Record/catalog item is now viewable and searchable by the public.	<table border="1"> <tr> <th data-bbox="813 184 1027 233">Next workflow state</th> <th data-bbox="1027 184 1511 233">Reason</th> </tr> <tr> <td data-bbox="813 233 1027 363">Withdrawn</td> <td data-bbox="1027 233 1511 363">Record is removed from publication either in contemplation of revision or because an ancestor (parent, grandparent etc) record will require revision</td> </tr> </table>	Next workflow state	Reason	Withdrawn	Record is removed from publication either in contemplation of revision or because an ancestor (parent, grandparent etc) record will require revision		
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Withdrawn	Record is removed from publication either in contemplation of revision or because an ancestor (parent, grandparent etc) record will require revision							
Withdrawn	Workflow state is no longer published. The record either requires review or change.	<table border="1"> <tr> <th data-bbox="813 426 1027 474">Next workflow state</th> <th data-bbox="1027 426 1511 474">Reason</th> </tr> <tr> <td data-bbox="813 474 1027 583">Approve</td> <td data-bbox="1027 474 1511 583">Record either does not required revision and or parent record is now corrected and the record is now publishable</td> </tr> <tr> <td data-bbox="813 583 1027 663">Review / Revise</td> <td data-bbox="1027 583 1511 663">Record actually does require revision so it it put in a workflow state where revision is possible</td> </tr> </table>	Next workflow state	Reason	Approve	Record either does not required revision and or parent record is now corrected and the record is now publishable	Review / Revise	Record actually does require revision so it it put in a workflow state where revision is possible
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Review / Revise	Record actually does require revision so it it put in a workflow state where revision is possible							

New User

a. Requesting an account

Please contact your organization's Librarian to be set up with a new user account with the privileges appropriate for your data management responsibilities. The Librarian will discuss what library, project, and (if appropriate) which datasets you need access to, and will create your account for that purpose. If your working scope should change, and you need access to additional libraries, projects, or datasets, please contact your InPort librarian and they can update your account.

For NOS please contact Brianna Key Brianna.Key@noaa.gov

For NMFS please contact Lee Weinberger Lee.Weinberger@noaa.gov

b. Log in

- i. The login page will require you to log in every time you access InPort. You can find this page by clicking on the "Login" tab located at the left top of the screen.
- ii. NOAA users with an InPort account can log in with their NOAA credentials, whereas non-NOAA users will create an InPort account and set their own password when their account is created.

- iii. You may access InPort without logging in, but will only be able to see records that are externally published, and will not be able to make any record changes.

Searching for metadata records

- a. A general search box is available on the InPort homepage and in the header of every other page.



Enter Keywords or Cat ID...

[Advanced Search](#) | [Browse the Catalog](#)

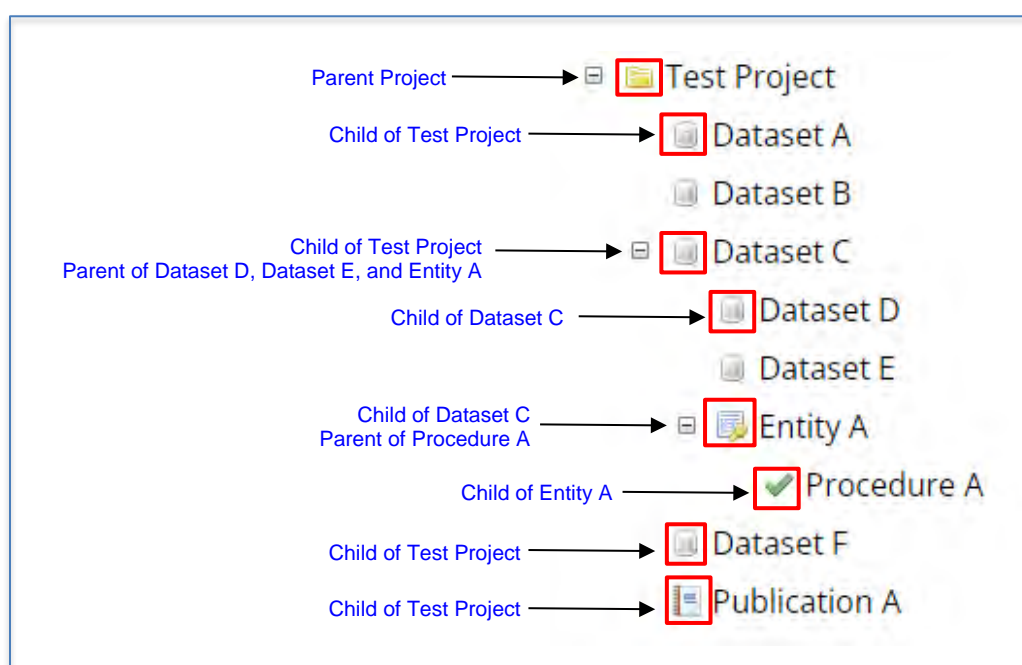
- b. This search will match words and phrases for the following Catalog Item fields: Title, Short Name, Abstract, Supplemental Information, Theme Keywords, Spatial Keywords, Stratum Keywords, Temporal Keywords, Instrument Keywords, Platform Keywords.
- c. An Advanced Search function is also available for adding additional query parameters, such as Catalog Item Type, Publication Status (logged-in users only), Organization, Time Frame, and Geographic Boundary. To access advanced search, click on the 'Search' tab in the upper left-hand corner.

Creating new metadata records

- a. The Catalog Editor is the main tool for entering, editing, and publishing an organization's metadata within their InPort Library
- b. Manual Method
 - i. New metadata records are added as child items under a library, project, dataset, entity, or procedure. To do this, open the catalog item that you want to be the parent. Parent items are an upper-level assembly that contains child items that are used to build the assembly. Child items are

the lower-level components that are required to build a parent item. For example, if you would like to add a new dataset directly under the library, open the library page. In the left hand corner, click on Item, and “Add Child Item”. On this page you will be asked to select catalog item type (listed below), and to name the item. The name should be the official name of the item. Click create and the item should immediately appear in the hierarchy.

- ii. These are the available child item options for each catalog item
 - a. **Library:** project, dataset, document, procedure
 - b. **Project:** dataset, project, document, procedure, publication
 - c. **Data Set:** entity, dataset, document, procedure
 - d. **Entity:** document, procedure
 - e. **Procedure:** document, procedure



Updating metadata

- a. Metadata should be updated on a regular basis, decided on by a data management plan (DMP). Update frequency should be specified in the “Catalog Detail” section under “Metadata Review Frequency”.
- b. To update an existing Catalog Item from an InPort XML file, navigate to the catalog item you wish to update. Under the Item Actions menu, click on the link, "Update Item From File".

Deleting metadata

- a. Deleting metadata is not common, as such you should work with your librarian to determine if a record should be deleted instead of moving to withdrawn status

- b. If a deletion is determined to be necessary, the Catalog Item and all its associated content will be permanently deleted. This action cannot be undone, and does not show up on the item history.

Metadata Content

- a. Rubric
- i. For all Data Sets, a metadata rubric report is available as a general NOAA-wide guideline for ensuring basic levels of discoverability for metadata in InPort. The rules and scoring for this rubric are subject to change over time in accordance with emerging requirements and recommendations. Please consult with your data documentation group on the appropriate guidelines to adopt for authoring metadata.
 - ii. The metadata rubric that InPort utilizes assesses the completeness of submitted metadata. The rubric issues points, both regular points and extra credit points to the metadata as it is completed. Important note, the rubric does NOT judge metadata quality.
 - iii. The rubric score is public as soon as the record is public.

Item Identification

Item ID	The Item ID is assigned to the record automatically. This is used to identify the record in InPort.									
Keywords	<p>A keyword is a word or phrase which describes a record. InPort has two types:</p> <ol style="list-style-type: none"> 1. Controlled Keywords belong to the controlled thesaurus which InPort supports. These include multiple Global Change Master Directory (GCMD) thesaurus, ISO 19115 topics, and additional thesauri. The list of approved thesauri can be found here: https://www.fisheries.noaa.gov/inport/help/components/keywords. This is the preferred category, as the keywords are selected from dropdown menus or as a searchable text. 2. Uncontrolled Keywords correspond to unconstrained free-text vocabularies which have not been mapped to a formal thesaurus, or controlled thesauri that InPort does not officially support. <div data-bbox="508 1430 1487 1728" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Controlled Keywords</p> <p>Thesaurus: <input type="text" value="Theme Global Master Change Directory (GCMD) Science Keywords"/></p> <p>Keyword: <input type="text" value="EARTH SCIENCE"/></p> <p><input type="button" value="Add New Keyword"/></p> <hr/> <p>No Controlled Keywords have been entered for this Catalog Item.</p> <p style="text-align: right;"><input type="button" value="Back to Item / Cancel"/></p> </div> <div data-bbox="508 1749 1487 1902" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Uncontrolled Keywords</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Type</th> <th>Thesaurus</th> <th>Keyword</th> </tr> </thead> <tbody> <tr> <td>Theme</td> <td>Geospatial Platform</td> <td>OceanCommunity</td> </tr> <tr> <td>Theme</td> <td>ISO 19115 Topic Category</td> <td>climatologyMeteorologyAtmosphere</td> </tr> </tbody> </table> </div>	Type	Thesaurus	Keyword	Theme	Geospatial Platform	OceanCommunity	Theme	ISO 19115 Topic Category	climatologyMeteorologyAtmosphere
Type	Thesaurus	Keyword								
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Physical Location	Physical location of the information being cataloged
Data Set Info	Scope, type, and entity assess
Support Roles	<p>Author: The Individual or Organization whose name should appear first in a citation for the resource (for names that come after the first use Co-Author). While it is possible to have an Author and Principal Investigator be the same Individual or Organization, Author is not the same as nor synonymous with Principal Investigator.</p> <p>Co-Author: The Individual(s) or Organization(s) whose name(s) should appear after the first name in a citation for the resource (use Author to denote the first name in the citation). While it is possible to have a Co-Author and Principal Investigator/Collaborator be the same Individual or Organization, Co-Author is not the same as nor synonymous with Principal Investigator or Collaborator.</p> <p>Collaborator: The Individual or Individuals who are the primary assistants to the lead researchers for the dataset. While it is possible to have a Collaborator and Author/Co-Author be the same Individual or Organization, Collaborator is not the same as nor synonymous with Author or Co-Author.</p> <p>Data Set Credit: Recognition of those who contributed to the data set.</p> <p>Data Steward: The Individual or Organization that has accountability and responsibility for the data and ensures appropriate care and maintenance of the resource.</p> <p>Distributor: The Organization that is responsible for providing the Public Access to Research Results (PARR)¹ required access to the data.</p> <p>Metadata Contact: The Individual or Organization that has accountability and responsibility for the metadata and ensures appropriate care and maintenance of the metadata record.</p> <p>Originator: The name of the Individual or Organization who is responsible for the data at the point when the data was first created. Applicable for data sets that are an aggregation of two or more data sets or if the data set is the first instance of the signal having been converted into data.</p> <p>Point of Contact: The Individual or Organization who is responsible for initial triage of and answering questions related to the resource. Can act as a generic role code for when a more appropriate role code does not exist.</p> <p>Principal Investigator: The Individual or Individuals who are the primary assistants to the lead researchers for the dataset. While it is possible to have a Collaborator</p>

¹ White House Memo on PARR (Increasing Access to the Results of Federally Funded Scientific Research): https://obamawhitehouse.archives.gov/sites/default/files/microsites/ostp/ostp_public_access_memo_2013.pdf

	<p>and Author/Co-Author be the same Individual or Organization, Collaborator is not the same as nor synonymous with Author or Co-Author.</p> <p>Process Contact: The name of the Individual or Organization who has processed the data in a manner such that the resource has been modified.</p> <p>Publisher: The Individual or Organization who prepares and issues the resource.</p>
Extents	Information about geographical extents (horizontal geographic areas and vertical extent) and temporal extents (time frames) for this record
Spatial Info	Information about the mechanisms used to represent and understand the density of spatial data. This section includes Spatial Resolutions, Spatial Representations and Coordinate Reference Systems
Access Info	Information about the methods and constraints of accessing the data represented by the catalog item.
Distribution Info	Links for the most current version of the resource and, if relevant, the site from which all versions of the data resource can be accessed.
URLs	Each URL is significant as a Universal Resource Locator on the WWW that helps describe a catalog item (e.g., a project web site, a report).
Activity Log	Log of activities or events that effect or impact the catalog item.
Issues	Each catalog issue that is significant as a problem, risk, or question about a catalog item (e.g., project, data set) that cannot be documented in other sections.
Tech Environment	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.
Data Quality	Details of the quality of the data being documented. These fields are Environmental Protection Agency Environmental Information Management System (EPA-EIMS) centric. Information within this area helps determine appropriate secondary use of the data resource. Note that some fields on this tab are appropriate for field collection data and some are appropriate for sensor data.
Data Management	Details of data management including budget, resources, compliance with data directive, delay Between Data Collection and Dissemination, etc.
Lineage	Information on the events and source data used to construct the dataset.
Acquisition Info	Information about acquisition of data, including any instruments, physical gear (e.g. fishing gear), or platforms used to deploy the instruments. If Instrument or Platform information is not available for this Data Set, please indicate that this is the case, as well as the reason.
FAQs	Each FAQ is significant as a frequently asked question and answer pair about a catalog item (e.g., project, data set).
Child Items	Each Catalog Item is significant as metadata information needed to describe fisheries

	data.
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 other published catalog items.
Catalog Details	Details and controls for the metadata last modification date and next review date of the catalog item.

Contact Us

- a. Access Issues: Contact your InPort Librarian.
- b. Other Issues: Please send InPort-specific questions and comments to EDMjira.inport@noaa.gov. If you need immediate assistance between the hours of 9:00am and 4:00pm EST/EDT, please contact: **Lee Weinberger at** (305) 361-4287 or Lee.Weinberger@noaa.gov.