

EPA Style Guide for Documenting GeoPlatform Online Content Items

Version 1.2, March 17, 2017

Document Change Control

The following is the document control for revisions to this document.

Version Number	Date of Issue	Author(s)	Brief Description of Change
V1.0	October 7, 2014	Steven Jett, Suzanne Pierson, Torrin Hultgren, Innovate!, Inc.	Initial Version.
V1.1	May 4, 2015	Steven Jett, Suzanne Pierson, Torrin Hultgren, Innovate!, Inc.	Updates for changes to Distribution Liability in order to comply with OMB Project Open Data requirements.
V1.2	March 17, 2017	Mettja Kuna, Suzanne Pierson, Torrin Hultgren, Innovate!, Inc.	Extracted the GeoPlatform Online portion of the EPA Metadata Style Guide and created a separate document.

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Introduction

This Style Guide provides suggestions on metadata preparation for [EPA GeoPlatform Online](#) content items. EPA GeoPlatform Online (GPO) allows users to create content items for sharing data through interactive web maps, web services, or applications. Detailed instructions on performing basic map authoring and other functions in EPA GeoPlatform Online are available from the [EPA GeoPlatform Online training intranet page](#).

Metadata and other characteristics of an EPA GeoPlatform Online content item may be viewed at the item's details page. General information about the details page may be found on the [ArcGIS Online help page](#). Content item characteristics contained on the details page are collectively referred to as "item properties." This Style Guide focuses on the properties that allow descriptive metadata entries; refer to the ArcGIS Online help document for more information about the other item properties found on the details page.

To access additional style guides designed specifically for creating metadata for geospatial and non-geospatial data and documenting web services, refer to [EPA's Metadata Style Guide for Geospatial and Non Geospatial Data](#).

For additional assistance, please contact the National Geospatial Support Team (NGST) (geoservices@epa.gov).

Adding Metadata to a GeoPlatform Online Content Item

This section is intended to guide users through EPA GeoPlatform Online documentation. Where applicable, this guide provides common language intended to make EPA GeoPlatform Online content more consistent. For assistance with locating suggested keywords and EPA organization names used to complete content item metadata fields (i.e., Title and Tags), please refer to [EPA's Metadata Style Guide – Keywords and EPA Organization Names](#).

EPA GeoPlatform Online stewardship requires that all shared content (data uploads, web maps, Story Maps, applications) contain descriptive metadata. Additionally, it is good practice to complete metadata for every item, including items that are not shared.

Metadata is defined and created for each content item added to EPA GeoPlatform Online. In most cases when the details page for a new content item is accessed, metadata properties such as the Description and the Access and Use Constraints fields will be blank and must be completed. However, if the item added is a web resource such as an ArcGIS Server web service, some properties may be pre-populated with metadata text from the web service. This will be the case if the web service preparer followed the guidance in the Style Guide titled, [EPA Style Guide for Creating ArcMap Web Service Metadata](#).

Metadata in EPA GeoPlatform Online may be edited by the owner of the content item. To add or edit metadata for the content item, click the [Edit](#) link for each section. The following guidance is provided to assist in completing the metadata properties:



1. **Title** – The title will appear when a user performs a search, therefore a descriptive title will convey much more information than, say, “Fred’s Map” or even “Water Quality Sites.” Although a lengthy title may be added to the title property, it is best to keep the title brief, reserving the details for the other fields. Consider including these details in the title:
 - The office or the program/project name (e.g. “US EPA REG 08” or “EnviroAtlas”). Please refer to [EPA’s Metadata Style Guide – Keywords and EPA Organization Names](#) for a list of EPA Organization Names.
 - A very short description of the data contained in the item. It is acceptable in the title to abbreviate terminology that is commonly understood within the Agency (e.g. “RCRA” or “NHD”), but consider spelling out less commonly understood terminology.
 - The geographic location of the data, if applicable (e.g. “Colorado”, “Iberia Parish, LA” or “US”).
 - The time period of the data, if applicable (e.g. “2010”, “1983-2014”, or “March 2012”).
 - *Example:* “US EPA REG 08 RCRA Sites, Colorado, 2014”



2. **Summary** – The summary field provides an opportunity to offer one or two sentences of brief, descriptive text about the content item. Consider beginning the summary text with the phrase, “This web map presents...” or “This web service presents...”. Consider the summary a shorthand version of the item’s description.

Edit Summary

This US EPA Shared Enterprise Geodata and Services (SEGS) web service contains polygon layers depicting US Level III and IV Ecoregions from the US EPA.

Save

Cancel

3. **Description** – The description field provides the ability to thoroughly describe the theme and purpose of the web map, dataset, or other content item. When entering information, think in terms of a user who has located the data and wants to know the who/what/when/where/why/ and how details. The description is a good place to spell out abbreviations used in the title and summary. Consider including these details in the description field:

- Details listed above that are recommended for the title.
- Purpose of the content item.
- Content item's data source.
- Data collection methods used to assemble the content item.
- Descriptions of the attributes in the data.
- Link to associated EDG metadata record, if applicable.
- Any other details that the user should know about the item being shared.

The description text box in EPA GeoPlatform Online allows for considerable formatting of the description text. A user may change font styles, format paragraphs, add hyperlinks and images, etc. Use any of these formatting options to create the description, and review the description to ensure user readability.

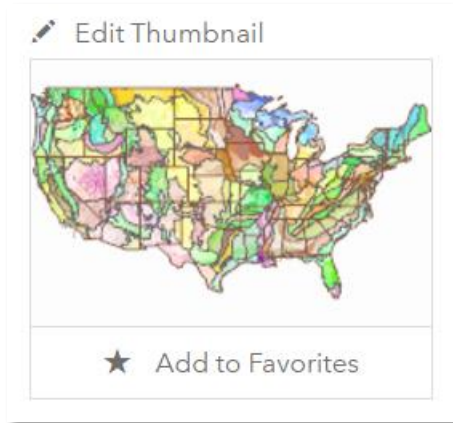
Edit Description

B I U A A | [Text Color] | [Background Color] | [Bulleted List] [Numbered List] [Indent] [Outdent] | [Link] [Unlink] [Insert Image] [Insert Video] | [Undo] [Redo] [Print] | small ▼

[Full Metadata](#) This United States Environmental Protection Agency (US EPA) Shared Enterprise Geodata and Services (SEGS) web service displays Level III and Level IV Ecoregions of the United States and was created from ecoregion data obtained from the US EPA Office of Research and Development's Western Ecology Division. The original ecoregion data was projected from Albers to Web Mercator for this web service. To download shapefiles of ecoregion data (in Albers), please go to: www.epa.gov/wed/pages/ecoregions.htm. IMPORTANT NOTE ABOUT LEVEL IV POLYGON LEGEND DISPLAY IN ARCMAP: Due to the limitations of Graphical Device Interface (GDI) resources per application on Windows, ArcMap does not display the legend in the Table of Contents for the ArcGIS Server service layer if the legend has more than 100 items. As of December 2011, there are 968 unique legend items in the Level IV Ecoregion Polygon legend. Follow this link (<http://support.esri.com/en/knowledgebase/techarticles/detail/33741>) for instructions about how to increase the maximum number of ArcGIS Server service layer legend items allowed for display in ArcMap. Note the instructions at this link provide a slightly incorrect path to "Maximum Legend Count". The correct path is HKEY_CURRENT_USER > Software > ESRI > ArcMap > Server > MapServerLayer > Maximum Legend Count. When editing the "Maximum Legend Count", update the

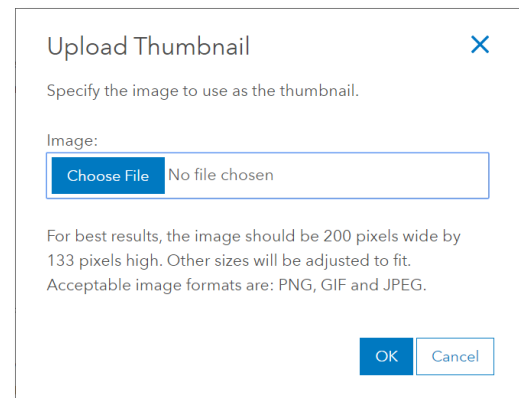
Save

Cancel



4. **Thumbnail image** – The thumbnail image displays along with the title and summary when the item is returned during a content search. The default thumbnail is a miniature map of the data extent. If the default thumbnail does not depict the dataset appropriately, or if a program or project logo is preferred for the thumbnail, it may be changed by selecting a saved graphic image with dimensions of

200 pixels wide by 133 pixels high. Images with different dimensions are automatically resized when uploaded and may appear warped. The image file size must be no larger than 1MB.



5. **Access and Use Constraints** – Access and use constraints include all information needed to ensure that the data are being used as intended by the data creator or provider. Before completing this section, answer the following questions:

- Should the dataset or web map include security restrictions? Does it include sensitive data, personally-identifiable data, intellectual property, etc.?
- Does the data layer have scale restrictions? In other words, was the dataset originally created at a specific spatial scale that makes it inappropriate to view or otherwise use at a different scale?
- Are there any known issues with the accuracy of the data that the user should be aware of?
- Do the data represent a discrete time period that the user should be aware of?
- Does the item originate from outside of EPA? If so, did the data originator include information about data constraints?

If the item has constraints based on the answers to the questions above, details must be provided in the Access and Use Constraints text box:

- **List the data's security classification**
 - restricted public – Data asset is available under certain use restrictions.
 - non-public – Data asset is not available to members of the public.
- **List access constraints**
 - If the item is considered confidential, explain:
 - The reason(s) for restricting distribution (e.g. data are sensitive, contain personally-identifiable information, or the item is intellectual property). Use one of the following EPA Use Constraints Statements for restricted data:
 - “These Data Are Restricted to Internal EPA Personnel Only.”
 - “These Data Are Restricted to Internal EPA Personnel Only and State Partners.”

- “EPA Category: Mission Sensitive, NARA Category: Critical Infrastructure”
- “EPA Category: Drinking Water Vulnerability Assessments, NARA Category: Critical Infrastructure-Water Assessments”
- “EPA Category: Sensitive Drinking Water Related, NARA Category: Critical Infrastructure-Water Assessments”
- “EPA Category: IT Security, NARA Category: Information Systems Vulnerability Information”
- “EPA Category: Law Enforcement Sensitive, NARA Category: Law Enforcement”
- “EPA Category: Attorney Client Privilege, NARA Category: Legal-Privilege”
- “EPA Category: Attorney Work Product, NARA Category: Legal-Privilege”
- “EPA Category: Deliberative Process Privilege, NARA Category: Legal-Privilege”
- “EPA Category: Personally Identifiable Information (PII), NARA Category: Privacy”
- “EPA Category: Proprietary, NARA Category: Proprietary”
- “EPA Category: Confidential Business Information, NARA Category: Proprietary-Manufacturer”
- “EPA Category: Source Selection Information, NARA Category: Proprietary-Source Selection”
- **List use constraints**
 - For data originating from within EPA, make a best effort to list:
 - Scale constraints – Example: “Data are intended to be used at scales of 1:24,000 or smaller.”
 - Accuracy constraints – Example: “Data were collected with a horizontal accuracy of 30 meters.”
 - Temporal constraints – Example: “Data represent ground condition on April 24, 1998.”
 - For data originating from outside of EPA:
 - Retain the originator’s use constraints information (if provided in their metadata or documentation).
 - Include the following EPA General Use Constraints Statement:
 - “Please check sources, scale, accuracy, currency and other available information. Please confirm that you are using the most recent copy of both data and metadata.”
 - If use constraints details cannot be ascertained for the data, use the EPA General Use Constraints Statement.

If there are no known access and/or use constraints for the data based on the answers to the questions above:

- **List the data’s security classification**
 - public – Data asset is or could be made publicly available to all without restrictions.

- **List access constraints**

- Use the term “None.”
- Include the EPA General Use Constraints Statement provided above for data originating outside of EPA.

[EPA’s Metadata Technical Specification](#) provides detailed guidance on access and use constraints.

Edit Access And Use Constraints

These data are available for public access and use and carry no restrictions.

Save Cancel

6. **Tags** – Tags are individual words, short phrases, and abbreviations that describe the content item and help direct a user to the item when they use one or more tags in an EPA GeoPlatform Online search. Additionally, a tag appears as a hyperlink on the content item details page. When the hyperlink is selected, a search returns additional content items containing the same tag. Separate tags with commas when entering them on the content item’s details page. For example, *ACS Demographics* is considered one tag, while *ACS, Demographics* is considered two tags. Please refer to [EPA’s Metadata Style Guide – Keywords and EPA Organization Names](#) for a list of suggested tags (keywords).

Edit Tags

ecoregions x US EPA x ORD x SEGS x

reference x

Add tag(s)

Save Cancel

- Credits** – Credits are acknowledgements of content item creators and providers. Acknowledge all entities that were involved in making the content item available for use. Credits provide users with important information about the origin of the content item.

Edit Credits

Map service: US EPA Office of Environmental Information (OEI). Data: US EPA Office of Research and Development (ORD).