

Suggested IRMA Procedures for Nationally Published NRTR, NRR, and NRDS Reports (17 January 2012)

Contents

	Page
1 - Introduction	2
1.1 - Suggested IRMA Data Entry Steps for New NRTR, NRR, or NRDS Reports	2
2 - IRMA Definitions and Concepts	3
2.1 - IRMA Reference Definitions	3
2.2 - IRMA User Type Definitions	4
2.3 - Visibility Status Definitions	4
2.4 - IRMA Lifecycle State Definitions and Ramifications	4
2.5 - Sensitivity and Proprietary/Copyright Information Definitions	6
2.6 - Units and Geographical Reference Definitions	7
3 - Finding and Opening an IRMA Reference for Editing	9
3.1 - Finding an Existing IRMA Reference in the Data Store	9
3.2 - Opening an IRMA Reference for Editing	10
4 - Creating a New Reference in IRMA	11
5 - Editing the Core Tab	13
5.1 - Editing Reference Contacts	15
6 - Editing the Information Resource Evaluation Tab	17
6.1 - Information Resource Sensitivity Evaluation Section	17
6.2 - Information Resource Proprietary Evaluation Section	18
7 - Editing the Units and Geographical Tab	19
8 - Editing Keywords Tab	21
9 - Editing the Permissions Tab	22
9.1 - IRMA Reference Owners and NRPM Reports	22
9.2 - Adding a New Viewer or Owner	22
9.2.1 - Finding an NPS Employee's Active Directory Name	23
9.3 - Changing Permissions for a Viewer or Owner	24
9.4 - Deleting an Owner or Viewer	24
10 - Reference Save and Lifecycle Options	25
11 - Adding and Managing Holdings	26
11.1 - Adding a Digital File to an Existing IRMA Reference	26
11.1.1 Adding New Owners to a Holding	28
11.2 - Viewing Holdings on the Main Reference Screen	28
11.3 - Adding Other Types of Holdings to an Existing IRMA Reference	29
11.4 - Viewing, Downloading, and Editing Holdings	29

1 - Introduction

This is an informal technical guide showing the suggested procedures for managing reference records in the [Integrated Resource Management Applications Project](#) (IRMA) (formerly NRInfo) for nationally published Natural Resource Technical Reports (NRTR), Natural Resource Reports (NRR), and Natural Resource Data Series (NRDS) reports.

More detailed and up-to-date information concerning IRMA can also be found on the [IRMA help site](#). If you can't get something to work right, or see something that needs to be changed in this document, contact [Fagan Johnson](#) at the Fort Collins NRSS office.

1.1 - Suggested IRMA Data Entry Steps for New NRTR, NRR, or NRDS Reports

- 1) Use the draft IRMA record that the Fort Collins office creates for you. The reasons that the NRSS office creates a draft for you, is to make sure that:
 - The report is minimally discoverable on searches of the IRMA site.
 - The policy-mandated information concerning the IRMA URL, peer review manager, report numbers, etc. is shared across the different NPS systems involved (NRPM database, eTic office, and IRMA).
 - The draft IRMA record created by the Fort Collins NRSS office will provide ownership and editing status to at least three NPS employees. This will be some combination of (one person may have multiple roles):
 - The NPS manager responsible for all reports published under their jurisdiction (I&M Regional Program Manager, I&M Network Program Manager, Regional Natural Resource Division Chief, NRSS Division Chief, or Park Superintendent).
 - The official Peer Review Manager listed on the Manuscript Submittal Form and Checklist (MSF).
 - I&M Network Data Manager (for all I&M projects).
 - NPS employees directly involved in writing and/or producing the report, or with the research project.
- 2) Update and activate the IRMA record, and upload a print-quality version of the report.
 - Adding to the bare minimal information used to create the draft reference is recommended. This will greatly enhance the discovery of the report through IRMA and other online search engines.
 - Upload at least one print-quality version of the complete report in PDF format. Additional files may also be uploaded to the same reference, including:
 - Brochures, pamphlets, etc.
 - Lower print-quality versions of the same report.
 - Stand-alone excerpts from the main report (usually SOPs, appendices, or abstracts/ executive summaries).
 - Large-sized printable maps.
 - GIS layers.
 - Database or other tabular data files.

2 - IRMA Definitions and Concepts

2.1 - IRMA Reference Definitions

Reference - unique record that identifies and describes an information resource. Each reference has its own seven digit identification number, or Reference Code.

Holding - a product that is attached to the reference, such as a digital or hard-copy version of a report, a link to an online site that houses the product, digital or hard-copy map products, etc.

- IRMA allows for multiple holdings to be attached to a single reference.
- For NRPM reports, holdings should always include a single print-quality digital version of the report in Adobe Acrobat format.

The ability to view, download, and edit references and holdings are determined by a combination of the IRMA user type, the visibility status of the reference, and the lifecycle states of the reference and the holding (Table 1).

Table 1. Overview of IRMA reference visibility and downloadability associated with user type and lifecycle state. Detailed definitions for these terms are provided in the sections below.

User Type	Can View/See Reference	Can Download	Can Edit
User (anyone)	With a public visibility status ¹ .	Only active holdings attached to that reference.	Never
Internal User (NPS employee)	With public and internal ² visibility status.	Only active holdings attached to parent references with a public visibility status ¹ .	Never
Viewer of Individual Reference	Always	All holdings attached to that reference.	Never
Owner of Individual Reference	Always	All holdings attached that reference.	Only the reference
Owner of Individual Holding	Always	Always	Only the holding

¹ References with a public visibility status must have an active lifecycle state, and not be marked as containing sensitive, copyright, or proprietary information.

² References with an internal visibility status either have lifecycle state of *In Review*, or have been marked as containing sensitive, proprietary, or copyright restricted information.

2.2 - IRMA User Type Definitions

User - anyone that has access to the internet and can see IRMA.

Internal User - currently, any NPS employee logged onto the NPS network that has access to the internet and can see IRMA.

Viewer - is granted broader view and download permissions for an individual reference, but have no editing permissions.

Owner - is granted full view, download, and edit permissions for an individual reference or holding. Currently, only NPS employees are granted ownership permissions in IRMA.

- Ownership for references is completely separate from ownership of holdings.
 - Only the owner of a reference can edit that reference.
 - Only the owner of a holding can edit that holding.
- The user that originally created the reference or holding is automatically an owner for that reference or holding.
- There can be multiple owners for a reference or holding.
- Reference and holding owners can add or subtract other owners and viewers for that reference or holding.

2.3 - Visibility Status Definitions

Public - visible to anyone with access to IRMA.

Internal - visible only to internal users (currently only NPS employees).

Restricted - visible only to owners or viewers of that reference.

2.4 - IRMA Lifecycle State Definitions and Ramifications

The same lifecycle states are used for both references and holdings. Additionally, the lifecycle states of references are completely separate from the lifecycle states of holdings. Definitions of the lifecycle states are below, along with a basic outline of how lifecycle states and visibility status combine to impact reference visibility and the ability to download holdings (Table 1).

Draft - the initial reference or holding record that is added to IRMA that has not been activated yet. You can only save a reference or holding as a draft during the initial creation of a new reference or holding, or if it is currently saved as a draft.

- Draft references:
 - Can only be seen by owners and viewers of that reference.
 - Do not show up on searches using IRMA search tools.
- Draft holdings can only be downloaded by owners of that individual holding.

Active - references and holdings that are ready for online distribution.

- Active References:
 - That have a public visibility status:
 - Can be seen by all users (the public).

- Show up in searches using the IRMA search tools.
- That have an internal visibility status (possibly sensitive or proprietary):
 - Can only be seen by internal users.
 - Only show up in searches using IRMA search tools run by internal users.
- Active Holdings:
 - Attached to active and public references are visible and available for download to all users (the public).
 - Attached to active and internal references are:
 - Visible to all internal users.
 - Only available for download by owners of that holding, and owners and viewers of the parent reference.
 - Attached to restricted references are:
 - Only visible or available for download by owners or viewers of the parent reference.

In Review - references or holdings that are not yet finalized, or are currently undergoing edits or updates.

- In review references have a visibility status of internal and:
 - Can only be seen by internal users.
 - Only show up on searches using the IRMA search tools run by internal users.
 - Only active holdings can be downloaded, and only by owners or viewers of the parent reference.
- Holdings that are in review:
 - Can only be seen by internal users.
 - Can only be downloaded by owners of that holding, or owners and viewers of the parent reference.

Quarantine - references are quarantined when they contain incorrect, poor quality, or out-of-date information that should no longer be distributed.

- Quarantined references:
 - Are only visible to owners or viewers of that reference.
 - Never show up in any searches using the IRMA search tools.
- Quarantined holdings can:
 - Only be seen by owners or viewers of the parent reference.
 - Only be downloaded by owners of the holding, or owners and viewers of the parent reference.

Note: please use the *Quarantine* option to remove file visibility for NRTR, NRR, and NRDS reports. Quarantined holdings are invisible to everyone but owners of the IRMA reference, never show up in IRMA or other search engine searches, and remain visible and available for download by owners of the IRMA reference.

Inactive - used in place of deleting the records entirely from IRMA³. This option should only be used in instances where a reference was mistakenly added to IRMA (e.g., duplicate entries of the same report, or when a draft iteration of a report was prematurely added to IRMA and later published through an external publisher).

³ Any reference or holding that was ever added to IRMA, was potentially distributed outside the NPS, and for legal reasons, cannot be deleted. However, references marked as either quarantined or inactive do not show up in any searches of the IRMA site, and cannot be seen or downloaded by anyone but owners or viewers of that reference.

- Inactive references can:
 - Only be seen by owners or viewers of that reference.
 - Never show up in any searches using the IRMA search tools.
- Inactive holdings are completely removed from visibility in IRMA and all online search engines. Inactive holdings are maintained behind-the-scenes for potential FOIA and other future requests for that information.

Note: Inactivated holdings are now hidden from everyone but IRMA administrators at the Fort Collins office.

Please use the *Quarantine* option to remove file visibility for NRTR, NRR, and NRDS reports. Quarantined holdings are invisible to everyone but owners of the IRMA reference, never show up in IRMA or other search engine searches, and remain visible and available for download by owners of the IRMA reference.

2.5 - Sensitivity and Proprietary/Copyright Information Definitions

Sensitivity Status - indicates whether or not a reference contains sensitive information. The three sensitivity status types are:

- **Non-Sensitive** (default) - reference does not contain sensitive information. There are no visibility or download restrictions placed on non-sensitive references (Table 1).
- **Sensitive** - reference does contain sensitive information.
 - If you pick this option, you must also specify one or more of the following sensitivity types (as shown on the *Information Resource Evaluation* tab).

The screenshot shows a web form titled "INFORMATION RESOURCE SENSITIVITY EVALUATION". At the top, there are tabs for "Core", "Information Resource Evaluation", "Units and Geographical", "Keywords", and "Permissions". A "Reload Saved Values" button is in the top right. Below the tabs, there are three radio buttons: "Non-Sensitive", "Sensitive" (which is selected), and "Unknown". Underneath, it says "If Sensitive, Then Check 1 or More". A grid of checkboxes follows, with "Endangered" and "Threatened" checked. A large black arrow points to the "Sensitive" radio button.

<input type="checkbox"/> Operations	<input type="checkbox"/> Archeological	<input checked="" type="checkbox"/> Endangered	<input type="checkbox"/> Security	<input type="checkbox"/> Caves
<input type="checkbox"/> Personal Info	<input type="checkbox"/> Indian Sacred Sites	<input checked="" type="checkbox"/> Threatened	<input type="checkbox"/> Commercial Value	<input type="checkbox"/> Minerals
	<input type="checkbox"/> Wells	<input type="checkbox"/> Cultural	<input type="checkbox"/> Paleontological	

- References and attached holdings can only be seen by internal users.
- Holding download is restricted to owners and viewers of the parent reference.
- **Unknown** - reference may contain sensitive information.
 - References and attached holdings can only be seen by internal users.
 - Holding download is restricted to owners and viewers of the parent reference.

Proprietary Status - indicates whether or not a reference contains proprietary or copyrighted information. The proprietary status types are:

- **Non-Proprietary** (default) - no proprietary information contained within a reference. There are no additional visibility or download restrictions placed on non-proprietary references (Table 1).
- **Proprietary/Copyrighted** - reference contains proprietary information. If you choose this option, you must also pick one of the following distribution qualifiers.
 - **Permission to Distribute** - was received from the original publisher, and there are no additional visibility or download restrictions.
 - **Permission to Distribute for Non-Commercial**
 - Reference can be seen by all IRMA users.
 - Attached holdings can only be seen or downloaded by internal users, and may be distributed to non-commercial entities outside the NPS.
 - **Permission to Distribute Internally**
 - Reference can only be seen by internal users.
 - Attached holdings can only be seen or downloaded by internal users.
 - **No Permission to Distribute**
 - Reference can only be seen by internal users.
 - Attached holdings can:
 - Only be viewed by internal users.
 - Only be downloaded by owners or viewers of the parent reference.
- **Unknown** - reference may contain proprietary information.
 - Reference can only be seen by internal users.
 - Attached holdings can:
 - Only be viewed by internal users.
 - Only be downloaded by owners or viewers of the parent reference.

2.6 - Units and Geographical Reference Definitions

Park Unit - NPS land management unit (park, historic site, etc.) or office location.

Unit Point of Contact (UPOC) - can approve or reject associating individual IRMA records to an individual park unit. Every unit within the NPS, whether it is a park, network, regional office, or the national office, etc., has one or more designated UPOCs. This shared role can be given to any NPS employee, regardless of whether they reside at

the unit. For instance, the Data Manager for the Rocky Mountain Network could share the UPOC role with park staff at one of the network's respective parks. Likewise, larger units may designate multiple users to be UPOCs.

Approved - reference link to an individual park unit has been approved by the UPOC, and will show up in searches of IRMA data associated with that park unit.

Pending (default) - reference link has not been approved by the UPOC yet, but still shows up in searches of IRMA data associated with that park unit.

Rejected - reference link to the individual park unit has been permanently removed by the UPOC, and will not show up in searches for IRMA data associated with that park unit.

3 - Finding and Opening an IRMA Reference for Editing

3.1 - Finding an Existing IRMA Reference in the Data Store

If a draft reference was recently created by the Fort Collins NRSS office for you, a direct URL address to the reference record will be provided. If you can't connect to the URL provided to you by the Fort Collins NRSS office, contact [Fagan Johnson](#) for assistance.

If you are looking for a report that was previously published in the NRTR, NRR, or NRDS report series, you can find the IRMA record for that report by either:

- 1) Searching for the report on the NRPM web pages that list all previously published national [NRTR](#), [NRR](#), or [NRDS](#) report series. Just click on the *Additional Information on IRMA* link located at the end of each citation.

2011/454 Simmons, T. 2011. Central Alaska network flowing waters monitoring program: 2009 annual report. Natural Resource Technical Report NPS/COR/NRTR—2011/454. National Park Service, Fort Collins, Colorado. [Additional information on NRInfo.](#)

OR

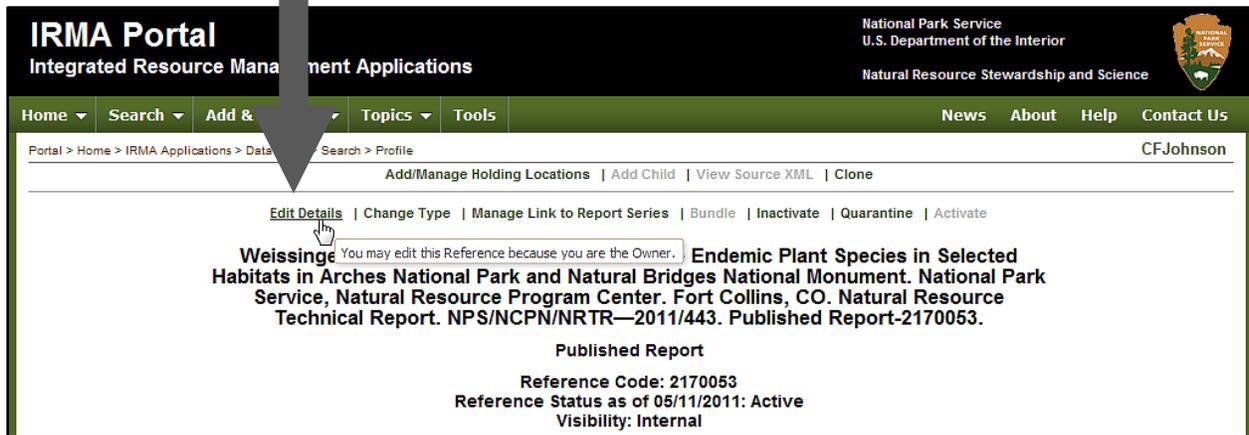
- 2) Going to the IRMA web page (<https://irma.nps.gov/>), and type-in part of the report title or subject matter you are looking for, and click the *Search* button to begin.

The screenshot shows the IRMA Portal search interface. At the top left, it says "IRMA Portal Integrated Resource Management Applications". At the top right, it says "National Park Service U.S. Department of the Interior Natural Resource Stewardship and Science" with the NPS logo. Below the header is a navigation bar with "Home", "Search", "Add & Manage", "Topics", and "Tools" on the left, and "News", "About", "Help", and "Contact Us" on the right. The main content area has a "Welcome to IRMA »" message. Below that is a search bar with the placeholder text "Enter search term here...". To the right of the search bar is a "Search" button. Below the search bar are radio buttons for "Refine by geographic area": "Parks", "Map", and "Search all" (which is selected). To the right of the search bar are links for "Search Tips" and "Advanced Search". At the bottom of the page is a footer with "US Department of the Interior", "FOIA", "Privacy Policy", "Disclaimer and Ownership", "NPS Home", "USA.gov", "Accessibility", and "EXPERIENCE YOUR AMERICA™". Two large grey arrows are overlaid on the screenshot: one points from the citation text above to the search bar, and another points from the citation text above to the search button.

3.2 - Opening an IRMA Reference for Editing

Only owners of a reference can edit the IRMA reference (Table 1). Once you have navigated to the IRMA reference that you desire to edit in your web browser:

- 1) Click the *Edit Details* link to begin editing.



The screenshot shows the IRMA Portal interface. At the top left, it says "IRMA Portal Integrated Resource Management Applications". On the right, it says "National Park Service U.S. Department of the Interior Natural Resource Stewardship and Science" with the National Park Service logo. Below this is a navigation bar with "Home", "Search", "Add & Manage", "Topics", and "Tools". To the right of the navigation bar are links for "News", "About", "Help", and "Contact Us". Below the navigation bar is a breadcrumb trail: "Portal > Home > IRMA Applications > Data & Reports > Search > Profile". To the right of the breadcrumb trail is the user name "CFJohnson". Below the breadcrumb trail are links for "Add/Manage Holding Locations", "Add Child", "View Source XML", and "Clone". Below these links is a row of action links: "Edit Details", "Change Type", "Manage Link to Report Series", "Bundle", "Inactivate", "Quarantine", and "Activate". A mouse cursor is pointing to the "Edit Details" link. Below the action links is a text box that says "Weissinge You may edit this Reference because you are the Owner." To the right of this text box is the title of the reference: "Endemic Plant Species in Selected Habitats in Arches National Park and Natural Bridges National Monument. National Park Service, Natural Resource Program Center. Fort Collins, CO. Natural Resource Technical Report. NPS/NCPN/NRTR—2011/443. Published Report-2170053." Below the title are the following details: "Published Report", "Reference Code: 2170053", "Reference Status as of 05/11/2011: Active", and "Visibility: Internal".

- 2) Proceed to the 6 – *Editing the Core Tab* section of this document.

If the *Edit Details* option is grayed-out, then you are not an owner of that reference, and will need to contact [Fagan Johnson](#) at the Fort Collins NRSS office for assistance.

4 - Creating a New Reference in IRMA

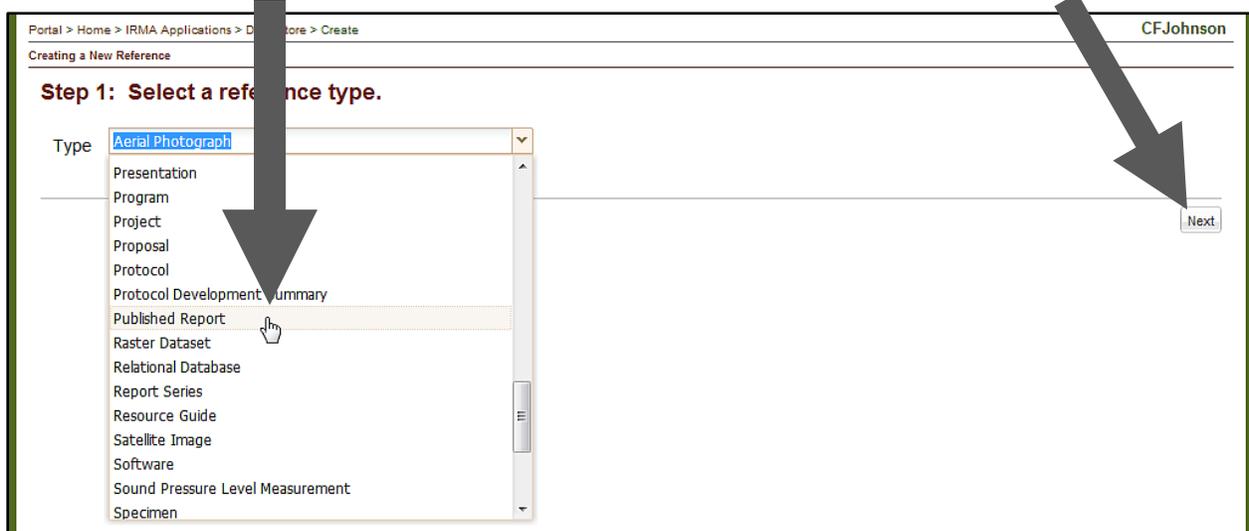
You should only create a new reference record for nationally published NRTR, NRR, and NRDS reports when instructed to do so by the Fort Collins NRSS office. This will help ensure that:

- The appropriate NPS policy-mandated information is permanently archived for each individual report in the official Manuscript Submittal Form and Checklist (MSF), and shared across the different NPS offices that manage those policy requirements.
 - Peer Review process - a record of the formal peer review process conducted by the NPS office sponsoring that report.
 - NRPM report number - assigned and managed by the Fort Collins office.
 - TIC number - obtained from the [eTIC office in Denver](#).
 - IRMA record - online distribution and digital archive system.

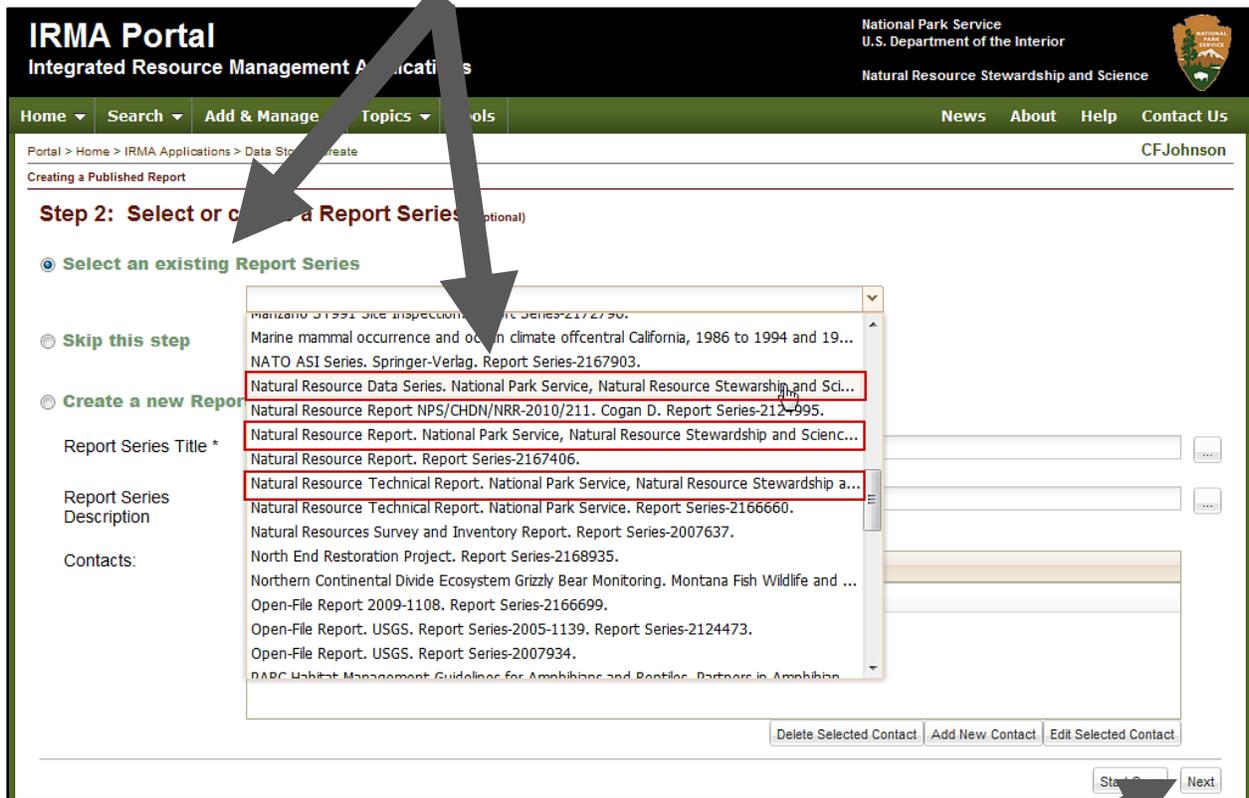
You can create a new reference from anywhere within the IRMA website (<http://irma.nps.gov/>). To begin, select the *Add Manage/Data Store/Create a Reference* menu option.



Step 1: Select *Published Report* from the *Type* drop-down menu, and click the *Next* button.



Step 2: a) Select the correct series from the default *Select an existing report* drop-down menu¹.



b) Click the *Next* button.

¹There are multiple report series with very similar names to the national NRPM report series. The three valid national report series are:

- Natural Resource Data Series. National Park Service, Natural Resource Stewardship and Science (<https://irma.nps.gov/App/Reference/Profile?Code=2007596>).
- Natural Resource Report , Natural Resource Stewardship and Science (<https://irma.nps.gov/App/Reference/Profile?Code=2007603>).
- Natural Resource Technical Report, Natural Resource Stewardship and Science (<https://irma.nps.gov/App/Reference/Profile?Code=2007610>).

Note: it is very important that you assign your report to the correct NRPM series. This will make finding your report in IRMA easier, and will make sure that your report is listed correctly on NPS Web sites, link to other reports in that series listed on IRMA, and saved correctly in the mandatory MSF (that permanently documents mandatory policy adherence for all NRPM reports).

Step 3: edit the new reference using the procedures outlined in Chapter 5 - *Editing the Core Tab*.

5 - Editing the Core Tab

If the *Edit Details* tabs are not already visible for a reference, click the *Edit Details* option to open the *Edit Details* screens (see 4.2 - *Opening an IRMA Reference for Editing*).

The *Core* tab is the first from the left, and default tab that is displayed in the *Edit Details* screens.

This chapter describes the *Core* tab fields required for all NRPM reports. Your Network, Regional, NRSS Divisional, or other NPS office may have additional requirements concerning the information saved to the *Core* tab.

1) To check and update the basic and required fields located near the top of the *Core* tab for NRPM reports:

a) Edit/update the *Report Title* field to match the one used in your final report.

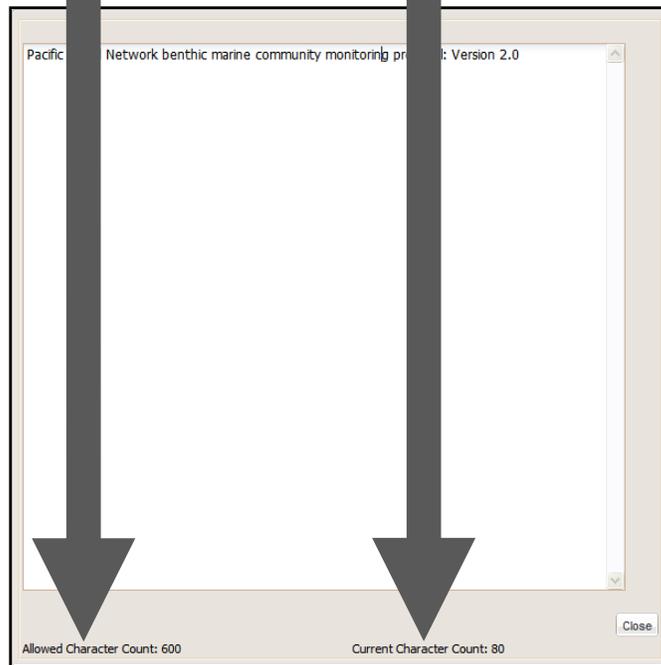
b) Click the “...” button to open the *Brief Description* text entry screen.

c) Fill in a brief description of your report in 400 characters

d) Click the *Close* button to save your brief description.

Note: the number of characters allowed in different IRMA edit text pop-up box screens varies. To make sure that your information will fit into the space allotted, the *Allowed Character Count* should always be greater than or equal to the *Current Character Count* (see below).

In IRMA edit text pop-up box screens, make sure that:
Allowed Character Count ≥ *Current Character Count*



2) Fields to complete in the center section of the *Core* tab for all NRPM reports:

- a) *Date of Issue*: month and year that report was first distributed in any way¹.
- b) *Place of Issue*: always use Fort Collins, Colorado for national reports.

- c) *Abstract/Full Description* (suggested):
 If you need more than 4000 characters, use the *Notes* field.

- d) Update the *Report Number/ID* field with the official NRPM report series name/number² (required field).

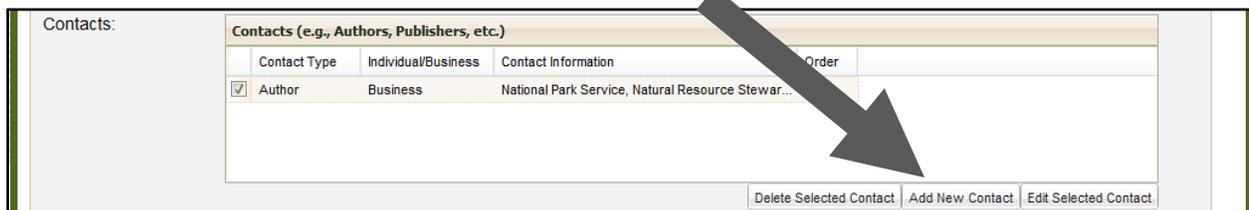
¹Date printed or electronic copies of the report are distributed, it is uploaded to IRMA, or posted on any publically-available online location.

²The series name/number assigned to this report by the Fort Collins NRSS office (e.g., NPS/NETN/NRR—2010/198, NPS/NRPC/NRTR—2010/327).

5.1 - Editing Reference Contacts

It is always a good idea to check the authors added to the list of contacts in the draft IRMA record created for you by the NRSS office. They are manually copied-over and/or typed using a combination of the report itself and the MSF form, and are susceptible to error. Instructions for adding new contacts and editing existing contacts are below.

To add a new *Contact* (authors, editors, and publishers)³, locate the *Contacts* section near the bottom of the *Core* tab, and click the *Add New Contact* button.



Contacts:

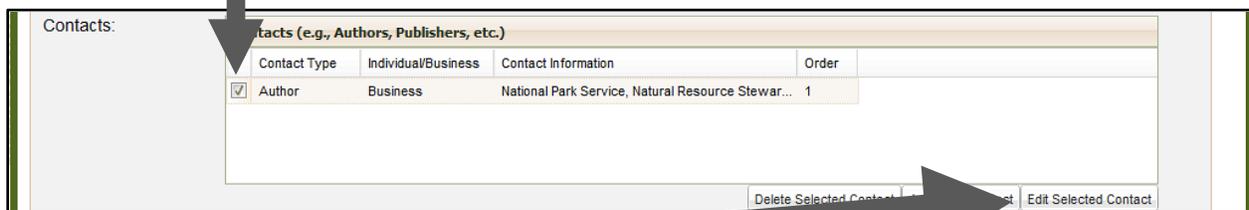
Contacts (e.g., Authors, Publishers, etc.)			
Contact Type	Individual/Business	Contact Information	Order
<input checked="" type="checkbox"/>	Author	Business	National Park Service, Natural Resource Stewar...

Delete Selected Contact | Add New Contact | Edit Selected Contact

³All authors mentioned in the final report are required. Editors and publishers are optional.

To begin editing existing contacts:

- 1) Click the check-box beside the desired contact name.



Contacts:

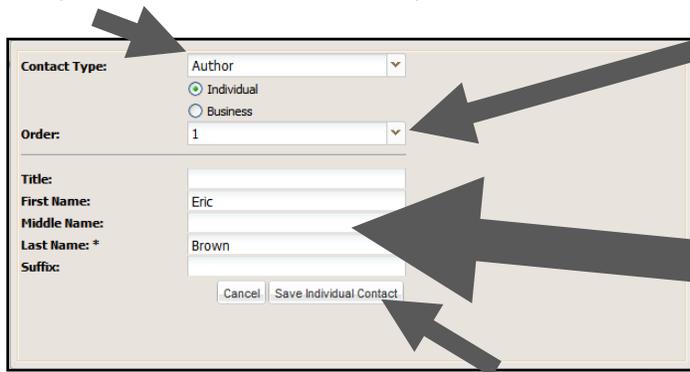
Contacts (e.g., Authors, Publishers, etc.)			
Contact Type	Individual/Business	Contact Information	Order
<input checked="" type="checkbox"/>	Author	Business	National Park Service, Natural Resource Stewar... 1

Delete Selected Contact | Add New Contact | Edit Selected Contact

- 2) Click the *Edit Selected Contact* button.

On the add/edit *Contact* pop-up screen:

1. Select the *Contact Type* from the drop-down menu (*Author, Editor, or Publisher*).



The screenshot shows a web form for adding or editing a contact. It includes a 'Contact Type' dropdown menu with 'Author' selected, radio buttons for 'Individual' (selected) and 'Business', and an 'Order' dropdown menu with '1' selected. Below these are text input fields for 'Title', 'First Name' (containing 'Eric'), 'Middle Name', 'Last Name' (containing 'Brown'), and 'Suffix'. At the bottom are 'Cancel' and 'Save Individual Contact' buttons. Four large black arrows point from the text instructions to the 'Contact Type' dropdown, the 'Order' dropdown, the 'First Name' and 'Last Name' fields, and the 'Save Individual Contact' button.

- 2) Use the *Order* drop-down menu to change the default the order of importance for this contact (1 is the primary author, 2 is the secondary author, etc.)⁴.

- 3) Fill in the First Name and *Last Name* (required fields), and other information as desired.

- 4) Click the *Save Individual Contact* button to exit.

⁴The order assigned to authors should match the order that they are listed in the official report citation. Editors and publishers should always be listed after the authors.

6 - Editing the Information Resource Evaluation Tab

If the *Edit Details* tabs are not already visible for a reference, click the *Edit Details* option to open the *Edit Details* screens (see 4.2 - *Opening an IRMA Reference for Editing*).

The *Information Resource and Evaluation* tab is the second tab from the left as displayed in the *Edit Details* screens. The options that you choose on this tab directly impact the visibility and ability for people to download documents (Table 1). Parks, Regions, I&M Networks, and NRSS Divisions may have additional rules concerning the information on this tab. Contact the office in question for more information.

6.1 - Information Resource Sensitivity Evaluation Section

Near the top of the *Information Resource Evaluation* tab, is the *Information Resource Sensitivity Evaluation* section. A review of the definitions and ramifications for changing sensitivity status are outlined below.

Sensitivity Status - indicates whether or not a reference contains sensitive information.

The three sensitivity status types are:

- **Non-Sensitive** (default) - reference does not contain sensitive information. There are no visibility or download restrictions placed on non-sensitive references (Table 1).
- **Sensitive** - reference does contain sensitive information.
 - If you pick this option, you must also specify one or more of the following sensitivity types.

The screenshot shows the 'INFORMATION RESOURCE SENSITIVITY EVALUATION' section of a web application. At the top, there are tabs for 'Core', 'Information Resource Evaluation', 'Geographical', 'Keywords', and 'Permissions'. Below the tabs, there is a 'Reload Saved Values' button. The main section is titled 'INFORMATION RESOURCE SENSITIVITY EVALUATION' and contains three radio buttons: 'Non-Sensitive', 'Sensitive', and 'Unknown'. The 'Sensitive' radio button is selected. Below the radio buttons, there is a section titled 'If Sensitive, Then Check 1 or More' with a grid of checkboxes for various sensitivity types: Operations, Personal Info, Archeological, Indian Sacred Sites, Wells, Endangered, Threatened, Cultural, Security, Commercial Value, Paleontological, Caves, and Minerals. The 'Endangered' and 'Threatened' checkboxes are checked. A large black arrow points to the 'Sensitive' radio button.

- References and attached holdings can only be seen by internal users.
- Holding download is restricted to owners and viewers of the parent reference.
- **Unknown** - reference may contain sensitive information.
 - References and attached holdings can only be seen by internal users.
 - Holding download is restricted to owners and viewers of the parent reference.

6.2 - Information Resource Proprietary Evaluation Section

Below the sensitivity section of the *Information Resource Evaluation* tab, is the *Information Resource Proprietary Evaluation* section. Definitions and ramifications for proprietary status are outlined below.

The screenshot shows a software interface window titled "INFORMATION RESOURCE PROPRIETARY EVALUATION". It features three radio buttons for selection: "Non-Proprietary" (which is selected), "Proprietary/Copyrighted", and "Unknown". Below this, there is a sub-section labeled "If Proprietary, Then Choose 1" containing four radio buttons: "Permission to Distribute", "Permission to Distribute for Non-Commercial", "Permission to Distribute Internally", and "No Permission to Distribute".

A review of the definitions and ramifications for changing the proprietary status are outlined below.

Proprietary Status - indicates whether or not a reference contains proprietary or copyrighted information. The proprietary status types are:

- **Non-Proprietary** (default) - no proprietary information contained within a reference. There are no additional visibility or download restrictions placed on non-proprietary references (Table 1).
- **Proprietary/Copyrighted** - reference contains proprietary information. If you choose this option, you must also pick one of the following distribution qualifiers.
 - **Permission to Distribute** - was received from the original publisher, and there are no additional visibility or download restrictions.
 - **Permission to Distribute for Non-Commercial**
 - Reference can be seen by all IRMA users.
 - Attached holdings can only be seen or downloaded by internal users, and may be distributed to non-commercial entities outside the NPS.
 - **Permission to Distribute Internally**
 - Reference can only be seen by internal users.
 - Attached holdings can only be seen or downloaded by internal users.
 - **No Permission to Distribute**
 - Reference can only be seen by internal users.
 - Attached holdings can:
 - Only be viewed by internal users.
 - Only be downloaded by owners or viewers of the parent reference.
- **Unknown** - reference may contain proprietary information.
 - Reference can only be seen by internal users.
 - Attached holdings can:
 - Only be viewed by internal users.
 - Only be downloaded by owners or viewers of the parent reference.

7 - Editing the Units and Geographical Tab

If the *Edit Details* tabs are not already visible for a reference, click the *Edit Details* option to open the *Edit Details* screens (see 4.2 - *Opening an IRMA Reference for Editing*).

The *Units and Geographical* tab, is the third tab from the left, and allows you to assign a reference to one or more NPS units. Final approval of the link to the NPS unit is made by the unit UPOC (see 2.6 - *Units and Geographical Reference Definitions*).

Important: Assigning park units on this tab is the most reliable way to make sure that a reference is returned during IRMA and other search engine searches for information associated with a park.

- IRMA and other search engines:
 - Always search the park unit information assigned on this tab.
 - Do not always find park names embedded into other, longer IRMA text fields.
 - Do not search the final uploaded document(s).

To submit a link request to the UPOC for your reference:

- 1) Use the type/select tool to pick a NPS unit.
- 2) Un-check the default *Automatically Add Bounding Box* option, if you do not want the report to be available for search using the IRMA geographic search tool.

Name ^	Code	Status	
Arches National Park	ARCH	Approved	delete
Natural Bridges National Monument	NABR	Approved	delete
Natural Resource Stewardship and Science	NRSS	Approved	delete
Northern Colorado Plateau Network	NCPN	Approved	delete

Name ^	Coordinates
<input type="checkbox"/> ARCH Default Bounding Rectangle	xmin, ymin: -109.713211, 38.6031723 xmax, ymax: -109.477722, 38.84694
<input type="checkbox"/> NABR Default Bounding Rectangle	xmin, ymin: -110.047867, 37.57018 xmax, ymax: -109.966507, 37.63485

- 3) Click the *Add Unit* button.

To remove a NPS unit link from a reference, click the word *delete* beside that unit name:

The screenshot shows a web interface with the following components:

- Navigation tabs: Core, Information Resource Evaluation, **Units and Geographical**, Keywords, Permissions
- Instructional text: "A Reference should only be linked to a NPS Unit if the Information Resource contains information specifically about that unit. See help for more guidance."
- Form fields: A dropdown menu, "Add Unit" button, a checked checkbox "Automatically Add Bounding Box", and "Add Bounding Box" button.
- Units Table:**

Name ^	Code	Status	
Arches National Park	ARCH	Approved	delete
Natural Bridges National Monument	NABR	Approved	delete
Natural Resource Stewardship and Science	NRSS	Approved	delete
Northern Colorado Plateau Network	NCPN	Approved	delete
- Bounding Boxes Table:**

Name ^	Coordinates
<input type="checkbox"/> ARCH Default Bounding Rectangle	xmin, ymin: -109.713211, 38.6031723 xmax, ymax: -109.477722, 38.84694
<input type="checkbox"/> NABR Default Bounding Rectangle	xmin, ymin: -110.047867, 37.57018 xmax, ymax: -109.966507, 37.63485
- Buttons: "Delete Selected" at the bottom left.

Three arrows indicate the workflow: one points from the 'delete' link in the 'Units' table to the 'Delete Selected' button, another points from the 'Delete Selected' button to the checkboxes in the 'Bounding Boxes' table, and a third points from the 'Delete Selected' button to the 'Delete Selected' button itself.

To remove the map bounding box from a park unit, select the check-box beside that park unit, and click the *Delete Selected* button.

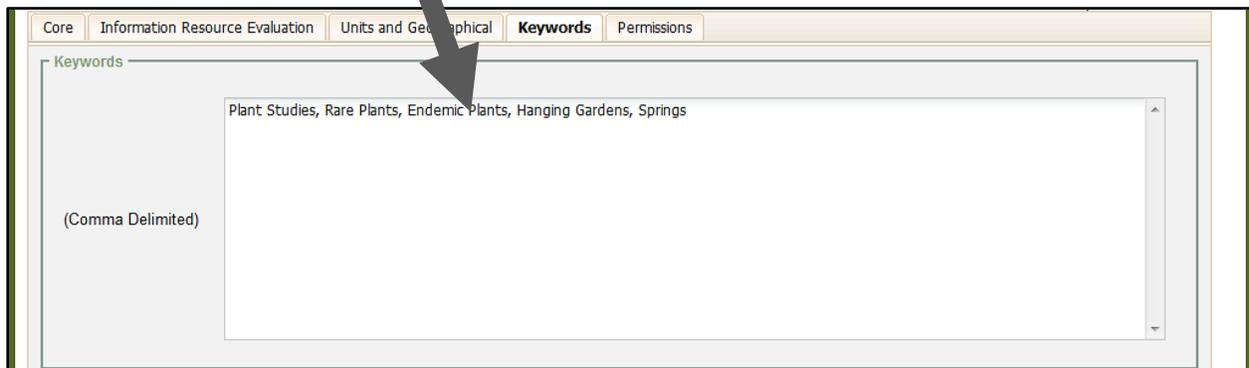
8 - Editing Keywords Tab

If the *Edit Details* tabs are not already visible for a reference, click the *Edit Details* option to open the *Edit Details* screens (see 4.2 - *Opening an IRMA Reference for Editing*).

The *Keywords* tab is the fourth tab from the left on the IRMA *Edit Details* or the *Create a Published Report* screens, and contains the *Keywords* form. The NRSS office does not fill in any keywords with the basic draft IRMA reference that they create for you.

Keywords aid in finding a reference when using the IRMA search tools, and most NPS offices require that the *Keywords* section of the *Keywords* tab be filled out.

In the *Keywords* form, add/update the keywords that you want to associate with this reference¹. Separate keywords with a comma.



The screenshot shows a web application interface with a tabbed menu at the top. The tabs are labeled 'Core', 'Information Resource Evaluation', 'Units and Geographical', 'Keywords', and 'Permissions'. The 'Keywords' tab is currently selected and highlighted. Below the tabs is a large text input area. Inside this area, the text 'Plant Studies, Rare Plants, Endemic Plants, Hanging Gardens, Springs' is entered. To the left of the input area, the text '(Comma Delimited)' is displayed. A large black arrow points from the 'Keywords' tab to the text input area.

¹The list of keywords should be specific and precise. You should not add park or unit name to the *Keywords* form, because that information should already be linked to that unit on the *Units and Geographical* tab.

9 - Editing the Permissions Tab

If the *Edit Details* tabs are not already visible for a reference, click the *Edit Details* option to open the *Edit Details* screens (see 4.2 - *Opening an IRMA Reference for Editing*).

The *Permissions* tab is the fifth tab from the left on the IRMA *Edit Details* or the *Create a Published Report* screens, and controls the edit permissions for a reference, and the ability to grant holding download privileges for internal references (Table 1).

9.1 - IRMA Reference Owners and NRPM Reports

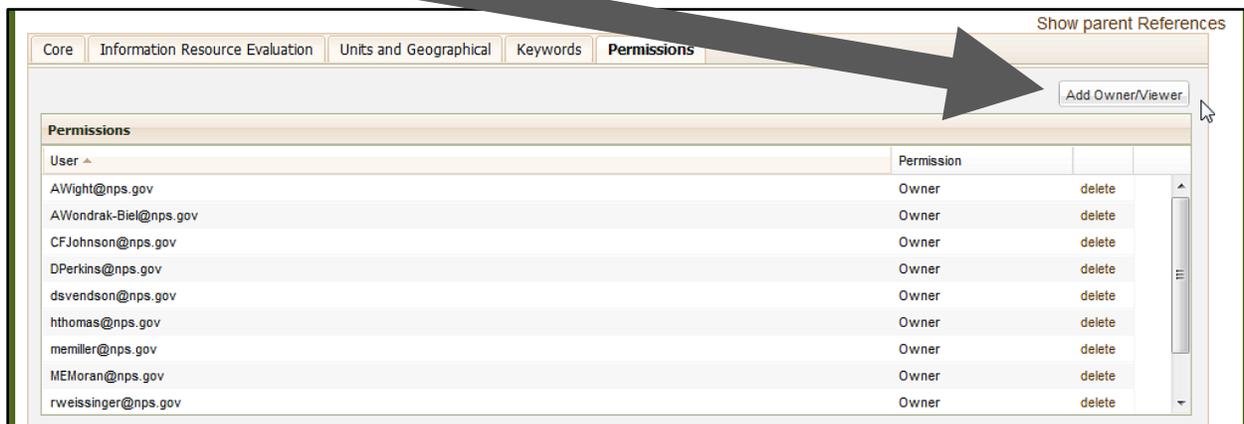
It is always a good idea to have three or more people from the same office sharing ownership of an IRMA reference. Usually, one or two have primary responsibilities for maintaining the reference, and the others function in a backup capacity. This helps to assure that your office maintains full control over the reference, regardless of employee turn-over.

The draft IRMA record that the Fort Collins NRSS office creates for you will have at least three owners from the NPS office that sponsored that report or project. This will be some combination of:

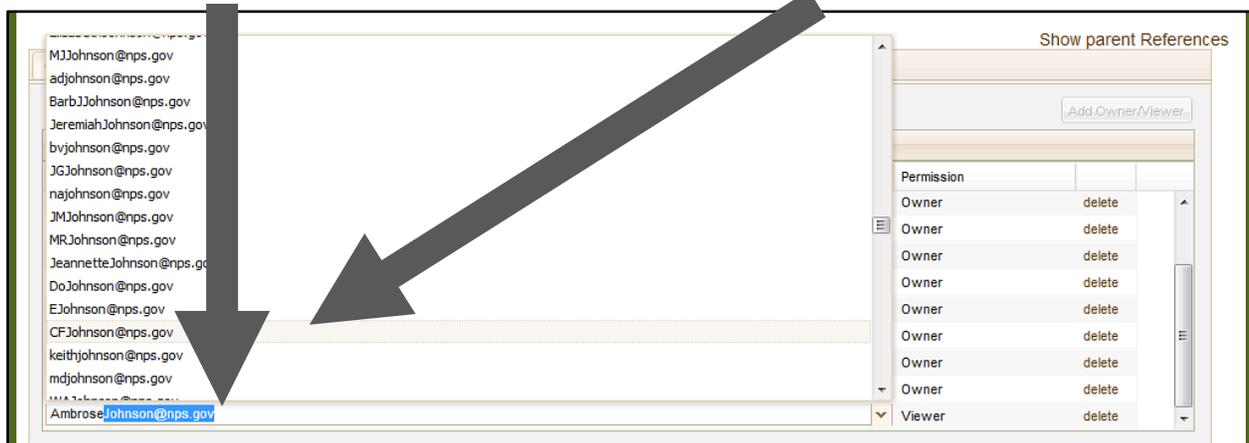
- The primary NPS contact. This is usually the person that sends the report in for final review, but can also be a NPS delegate for an external source.
- The official Peer Review Manger that was on the Manuscript Submittal Form and Checklist that was sent in with final draft to NRSS office (always a NPS employee).
- One or more other people from the NPS office sponsoring the project or report. This is always some combination of the:
 - I&M Network Data Manger.
 - I&M Regional or Network Program Manager, NRSS Division Chief, etc.
 - NPS subject or communication specialist (usually someone directly involved in the writing or peer review process for that report).

9.2 - Adding a New Viewer or Owner

- 1) To add a new owner or viewer to a reference, go to the *Permissions* tab and click the *Add Owner/Viewer* button.



- 2) After you click on the *Add* button, a new row is automatically added to the *Permissions table*.
- 1) In the *User* field, type in the NPS Active Directory name of the user name you wish to add (see 9.2.1 – *Finding an NPS Employee’s Active Directory Name*). **b)** Pick the correct user name from the automatically generated list.



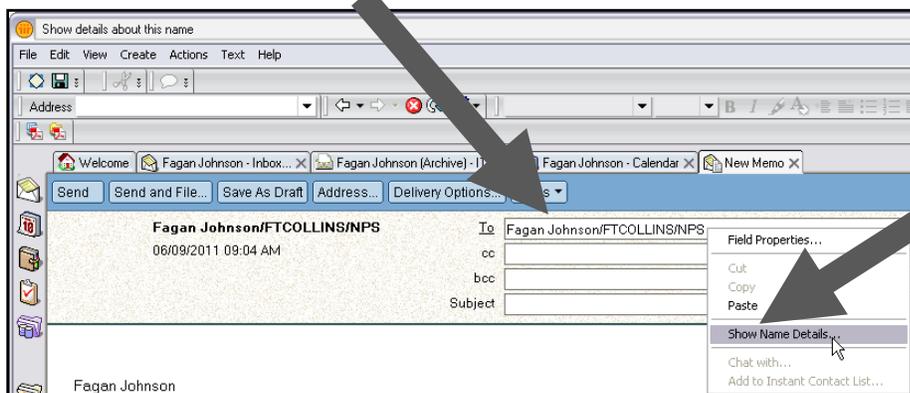
- c) If a new row is added to the *Permissions table*, the *user* has been successfully added. If not, you will need to go back to the first step on the previous page to try again.

9.2.1 - Finding an NPS Employee’s Active Directory Name

IRMA will only allow you to add a user that has a NPS active directory account (account name used to log onto NPS computers). User names must match exactly, and are case sensitive. Upcoming releases of IRMA are scheduled to include non-NPS employees and use full names.

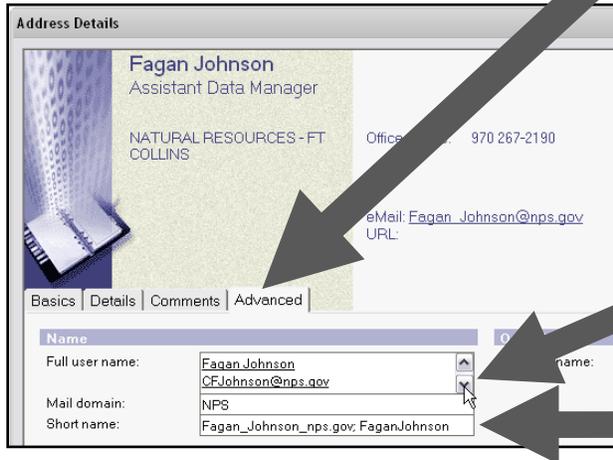
The easiest way to find the Active Directory login name for an NPS employee is through *Lotus Notes* email software. You must be a NPS employee and have *Lotus Notes* software on your computer to use this option.

- 1) In *Lotus Notes* email software, begin a *New Memo* (email), and use the software to automatically fill-in that NPS employee’s email address into the *To* field.



- 2) Right-click with your mouse on the name, and select the *Show Name Details* option.

3) This opens the *Address Details* screen. Select the *Advanced* Tab.



The Active Directory Name will either be at the bottom of the *Field User Name* field

OR

Short name field.

9.3 - Changing Permissions for a Viewer or Owner

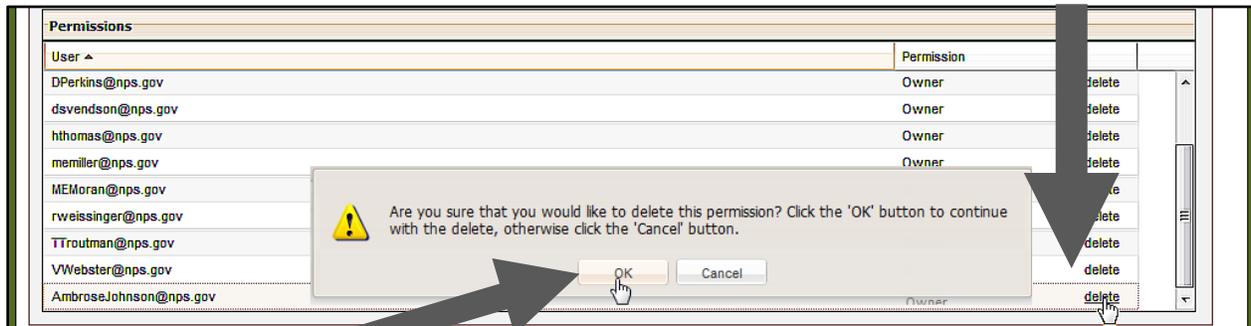
To change the permissions granted to a user already added to the *Permissions* table, click the *Permission* field beside that user, and pick either *Owner* or *Viewer* (*Viewer* is the default).



9.4 - Deleting an Owner or Viewer

To delete a user from the *Permissions* table:

a) Click the word *delete* beside that user.

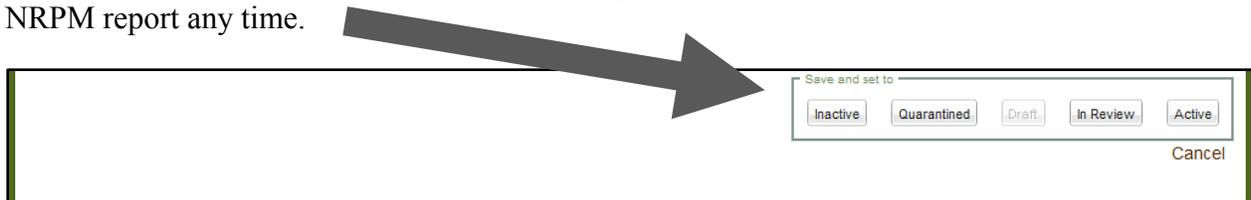


b) Click the *OK* button on the pop-up warning screen.

10 - Reference Save and Lifecycle Options

If the *Edit Details* tabs are not already visible for a reference, click the *Edit Details* option to open the *Edit Details* screens (see 4.2 - *Opening an IRMA Reference for Editing*).

The save option tools are located in the *Save and Set* box on the lower right-hand portion of all *IRMA Edit Details* or the *Create a Published Report* screens. You can save a reference for a NRPM report any time.



For more information on the different lifecycle states, and the ramifications for visibility and downloadability of a reference, see Table 1 and chapter 2.4 - *IRMA Lifecycle State Definitions and Ramifications*.

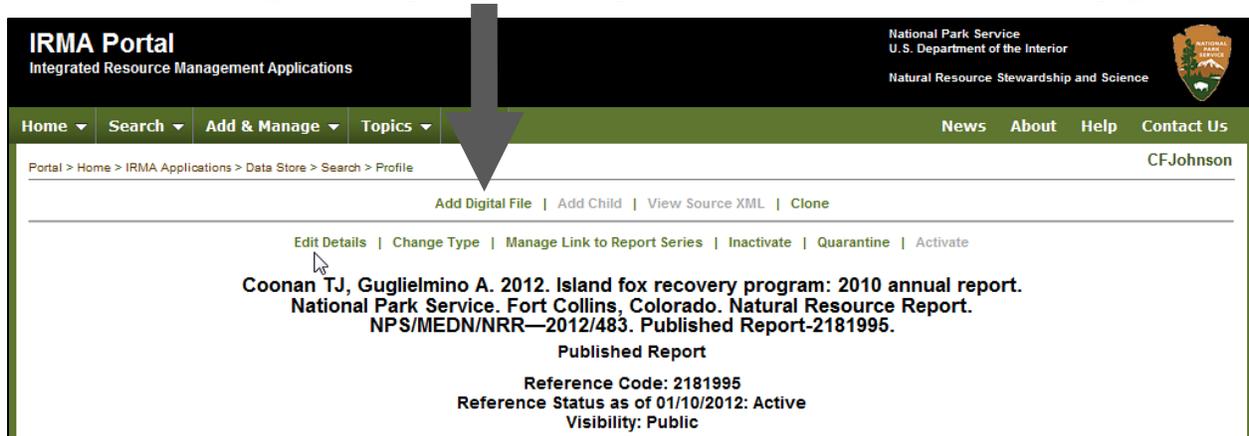
11 - Adding and Managing Holdings

Multiple digital files, external webpage sources, descriptions of the locations where physical documents or objects are contained, etc., called *Holdings*, can be attached to the same IRMA reference. Any internal IRMA user may upload a holding to a reference. Furthermore:

- Only active holdings are available for download.
- Only owners of the individual holdings have editing rights to that holding.

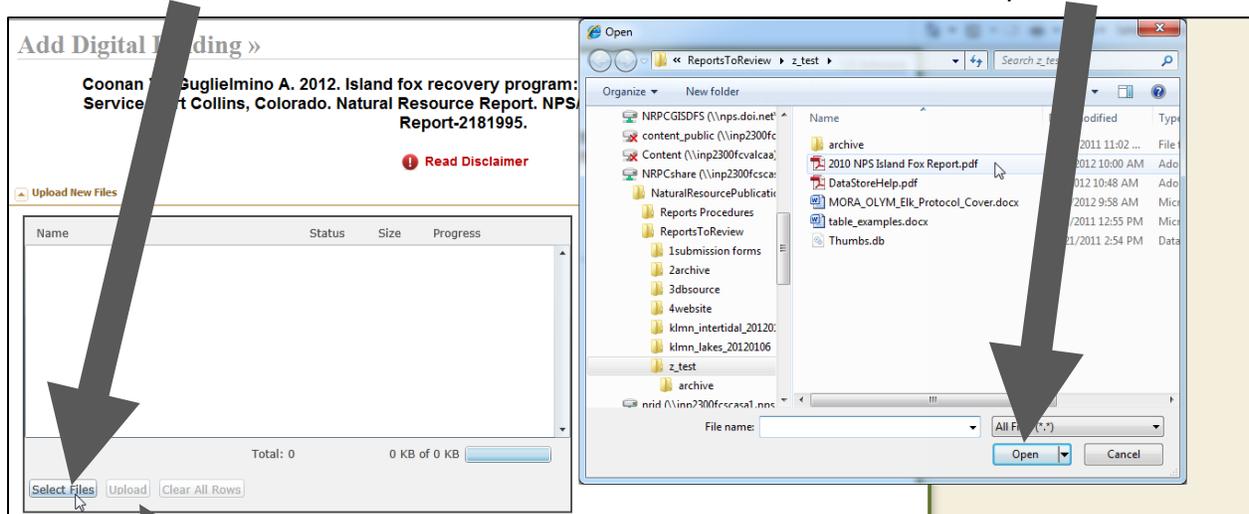
11.1 - Adding a Digital File to an Existing IRMA Reference

1) Click the *Add Digital File* option near the top-center of the main reference record page.



2) On the next screen click the *Select Files* button.

3) Use the automatic *Windows Explorer* tools to select a file, and click the *Open* button.



4) After you have one or more files that you want to upload, click the *Upload* button to upload the selected file(s).

Files have been successfully uploaded when the *Status* field reads *Complete*, and the *File Uploaded* and *Add or Remove Owners* sections expand and are ready for updating and editing.

The screenshot shows a file upload summary table with columns for Name, Status, Size, and Progress. A file named '2010 NPS Island Fox Report.pdf' is listed with a status of 'Complete', a size of '2 MB', and a progress indicator of a green checkmark. Below the table, there are buttons for 'Select Files', 'Upload', and 'Clear All Rows'. A progress bar shows 'Total: 1' and '2 MB of 2 MB'. Below the summary, there is a section titled '1 File Uploaded' with a description field containing '2010 NPS Island Fox Report.pdf'. Below that is the 'Add or Remove Owners (Optional)' section, which includes a table with columns for 'User' and 'Permission'. The table contains one entry: 'delete' for user 'cfjohnson@nps.gov' with 'Owner' permission. Below the table is a 'User:' field with a dropdown menu showing 'ITCoonan@nps.gov' and an 'Add' button. At the bottom right, there are buttons for 'Save and set status to:' with options: 'Inactive', 'Quarantine', 'Draft', 'In Review', and 'Active'. A callout box with step 5 points to the description field.

5) ¹In the *File Upload* section, fill in a brief description of the file uploaded as desired.

6) Add new ²Owners to holding as desired (see chapter 11.1.1 *Adding New Owners to a Holding*).

7) Click the *Active* (recommended) or *Draft* button to finish (³**Note:** this will take you to the main reference screen).

¹Since multiple holdings can be uploaded to the same IRMA reference, we suggest:

- You add a short description with just enough information to help users pick the correct file to download. Longer descriptions can make picking the correct holding more confusing.
- Dates are sometimes added to the description for clarity.
- Below are some examples of short and functional descriptions.

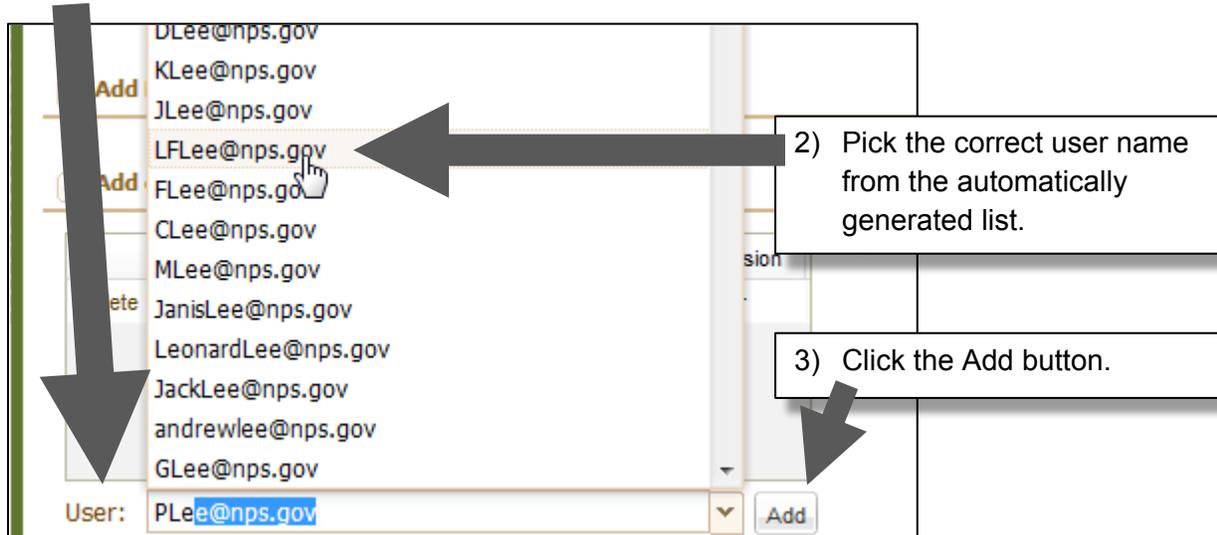
“Final print-quality PDF - 1/11/2012”
“Summary Brochure”
“Old/outdated PDF, June 2010”

²It is a good idea to have more than one owner for each holding. For NRPM reports, we suggest that you always include the appropriate I&M Network Data Manager, and one to two others from the office that produced the report (see chapter 11.1.1 *Adding New Owners to a Holding*).

³Once you click the *Active* or *Draft* button, you immediately return to the main reference page. The old/legacy *Holding Management* page no longer exists. Holdings are now managed directly on the main reference page. See chapter 2.4 - *IRMA Lifecycle State Definitions and Ramifications* for details about the lifecycle states of holdings.

11.1.1 Adding New Owners to a Holding

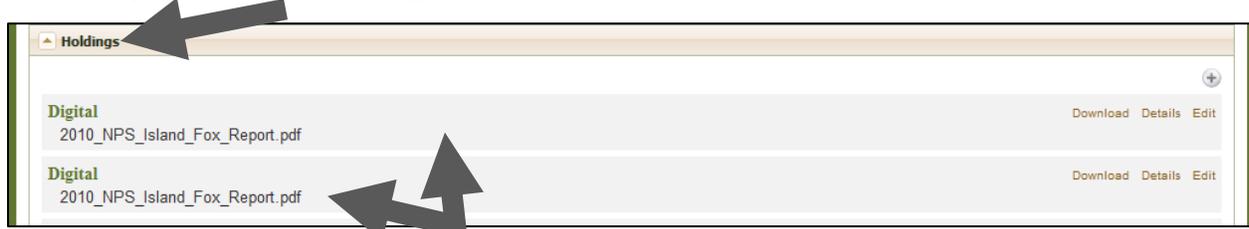
1) In the *User* field, type in the NPS Active Directory name of the user name you wish to add (see chapter 9.2.1 – *Finding an NPS Employee’s Active Directory Name*).



If a new row is added to the *User* table, the new *user* has been successfully added. If not, you will need to go back to Step 1 above and try again.

11.2 - Viewing Holdings on the Main Reference Screen

Once you click the *Active* or *Draft* button, your new holding has been added to the reference, and you will immediately be taken to the main reference page. Scroll about half-way down the main reference page to see the holdings attached to that reference.

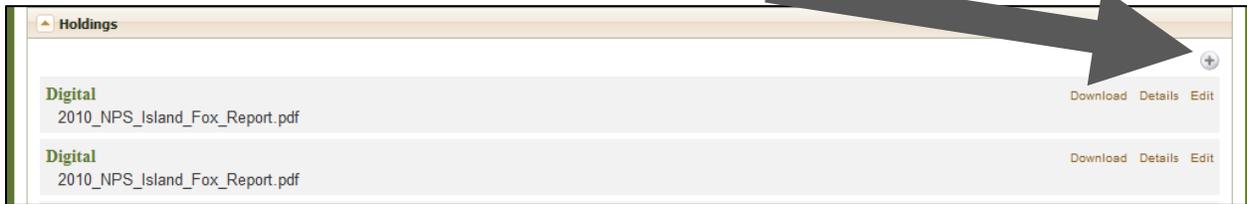


Note: Having multiple versions of the exactly the same PDF file is sometimes the result of a single person uploading multiple copies of the same file, because they were expecting to see the now retired *Holdings Management* page. Holdings are currently managed directly in the *Holdings* section on the main reference screen.

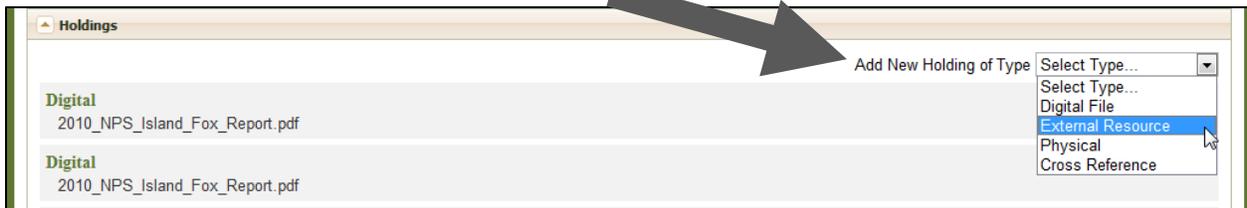
If you suspect that there are duplicate holdings attached to the same reference, contact the appropriate I&M Network Data Manager (<http://science.nature.nps.gov/im/contactsim/searchcontact.cfm>), or Fagan Johnson (fagan_johnson@nps.gov) at the Fort Collins NRSS office for assistance.

11.3 - Adding Other Types of Holdings to an Existing IRMA Reference (Optional for NRPM Reports)

- 1) Scroll about half-way down the main reference page to the Holdings section, and click on the *Add New Holding* icon (small and gray “plus” icon).



- 2) Use the ⁴*Add New Holding Type* drop-down menu to select the type of holding to add.



Making a selection will automatically take you to the *Add/Edit* holding screen for that holding type. The *Add/Edit* holding screens are very similar for all types of holdings, as shown in the screenshots displayed in *11.1 - Adding a Digital File to an Existing IRMA Reference*.

Since only digital file holdings are mandatory for NRPM reports, this guide does not provide screenshots for adding other types of holdings. More information about adding other types of holdings can be found at the [IRMA help site](#).

⁴Holding types shown in the *Add New Holding Type* drop-down menu include:

- *Digital Files*: any file that is in a digital format (mandatory for all NRTR, NRR, and NRDS reports) (see *11.1 - Adding a Digital File to an Existing IRMA Reference*).
- *External Resource*: online URL that contains information associated with that reference.
- *Physical*: the location and/or address where a physical copy is maintained or archived.
- *Cross Reference*: cross references other NPS/DOI archiving systems that maintain a physical or digital copy of the report.

11.4 - Viewing, Downloading, and Editing Holdings

All holdings attached to a reference can be seen and managed directly on the main reference page. Scroll about half-way down the page to see the *Holdings* section.

To open or download a *Digital* file, click the *Download* link.



If you hover your mouse over the word *Details* for a holding, a pop-up box will open with additional information about that holding (name and size of the file, description, etc.).

The *Location* attribute provides an URL address that can be copied-over to websites, emails, etc.; providing a direct link to view and/or download the file as user permissions allow.

Holding Details

- Description -
- Downloadability Public
- Lifecycle Active
- Owners TCoonan@nps.gov
- Type Digital
- Visibility Public
- Location https://irma.nps.gov/App/Reference/DownloadDigitalFile?code=443290&file=2010_NPS_Island_Fox_Report.pdf
- Name 2010_NPS_Island_Fox_Report.pdf
- Size 2.2 MB
- Format Portable Document Format File

To begin editing an individual holding, click the *Edit* button.

Update the *Description* field (see footnotes one and two on page 27) and add new *Owners* (see chapter 11.1.1 *Adding New Owners to a Holding*) as desired.

Edit Digital Holding »

Coonan, Guglielmino A. 2012. Island fox recovery program: 2010 annual report. National Park Service, Collins, Colorado. Natural Resource Report. NPS/MEDN/NRR—2012/483. Published Report-2181995.

Description

Owners

	User	Permission
delete	LFLee@nps.gov	Owner
delete	TCoonan@nps.gov	Owner
delete	CFJohnson@nps.gov	Owner

User: Add

Cancel Save as Legacy **Save and set status to:** Inactive Quarantine Draft In Review Active

Select the correct ⁵*Save and set Status to:* button to select the desired lifecycle state (see chapter 2.4 - *IRMA Lifecycle State Definitions and Ramifications*). This will take you back to the main reference screen.

⁵Warning: Inactivated holdings are now hidden from everyone but IRMA administrators at the Fort Collins office.

Please use the *Quarantine* option to remove file visibility for NRTR, NRR, and NRDS reports. Quarantined holdings are invisible to everyone but owners of the IRMA reference, never show up in IRMA or other search engine searches, and remain visible and available for download by owners of the IRMA reference.

The edit holding screens are very similar for all types of holdings. Since only digital file holdings are mandatory for NRPM reports, this guide does not provide screenshots for editing other types of holdings. More information about editing other types of holdings can be found at the [IRMA help site](#).