Geospatial One-Stop
Channel Steward Handbook

September 2004
Version 1.0

Table of Contents

Introduction 2
1.0 Channel Overview & Steward Roles 2
1.1 Channel Steward Selection 2
1.2 Channel Steward Roles and Responsibilities 3
1.3 Channel Steward Authority 3
1.4 Channel Steward Assessment 3
1.5 Layout of a Typical Channel 4
1.6 Strategies for Building Content 6
1.7 Criteria for Adding Featured Resources 7
1.8 Channel Review and Update 8
1.9 Creating and Fostering Channel Communities 8
Overview of Channel Steward Tools – Desktop and Web 9
Overview of Procedures for Managing Channels 12
2.0 Desktop Channel XML Editor Tool Functions 13
2.1 Logging In 13
2.2 Downloading Channel XML Files for Editing 15
2.3 Checking Channels Out/In 16
2.4 Creating Sub-Channels 17
2.5 Arranging the Order 19
2.6 Editing Channel Properties 20
2.7 Editing Link Properties 21
2.8 Editing Section Content: Searching for Metadata 23
2.9 Editing Section Content: Saving/Loading Search Results 26
2.10 Editing Section Content: Adding Records to Sections 27
2.11 Editing Section Content: Adding External Links 29
2.12 Previewing 31
2.13 Working Offline: Editing Existing Channels 32
2.14 Working Offline: Creating New Channels 33
3.0 Web-based Administrative Channel Management Tool Functions 34
3.1 Logging In 34
3.2 Downloading Channel XML Files for Editing 35
3.3 Checking Channels Out/In 36
3.4 Creating Sub-Channels 39
3.5 Update Channel Content on the Production Server 42
3.6 Reverting to Previously Saved Versions 43
3.7 Assigning Stewards and Contributors 44
Appendix A: Naming Conventions 45
Appendix B: Relating the Tools to the Portal 46
Appendix C: Glossary Terms 51

Geospatial One-Stop
Channel Steward Handbook

Introduction

This Handbook provides information regarding the role, responsibilities, and tasks of Geospatial One-Stop (GOS) Channel Stewards. As the Channel Steward program evolves, regular updates will be made to the document to address operational issues and new Channel functions.

The handbook is organized into three sections:

1.0 Channel Overview & Steward Roles
2.0 Desktop Channel XML Editor Tool Functions
3.0 Administrative Channel Management Web Tool

1.0 Channel Overview & Steward Roles

The objective of the Geospatial One-Stop (GOS) program is to establish a one-stop, e-Gov, Internet portal that provides quick access to geospatial data resources managed by all levels of government within the US. The motto 'two clicks to content' was adopted to focus GeoData.gov portal design toward connecting users to content with minimal navigational effort.

To achieve this objective, the Portal's "Data Categories" were designed around the *International Organizations for Standards Metadata Standard* (ISO 19115) *Topic Categories* . These categories were later extended to highlight data applications and current events that feature easy access to multi-theme activities.

For purposes of this handbook, the term 'Channels' will be used to refer to both the Portal's Data Categories and the multi-theme featured activities. Both are structured and managed similarly within the Portal. The channel concept provides both a high-level structure for data organization and an opportunity to distribute GeoData.gov portal management among an elite team of experts known as Channel Stewards.

The Channel Stewards are not tasked to create metadata records or to ensure the quality of the data described by the metadata. Instead, the Channel Steward is considered a leader within their data or application community who can assess available metadata records within the geodata.gov, then select and feature those data sets which merit "two clicks to content" on the Portal.

1.1. Channel Steward Selection

Channel Stewards have been recruited based upon both their reputation as an expert within the thematic community and their ability to coordinate a national community. As a result, most of the initial Channel Stewards are Federal agencies already tasked with contributing toward the GOS program. There are however, no restrictions on the type of organization that can serve as a Channel Steward.

1.2. Channel Steward Roles and Responsibilities

The primary role of the Channel Steward is to compile and manage the content of the Channel on the Geodata.gov website. More specifically, the Channel Steward's role includes:

- customizing the content of the Channel page(s)
- general maintenance and update of the Channel content.
- creating and fostering a Channel Community.

It is the responsibility of the Channel Steward to ensure that data resources featured within the channel offer value to the community and have been researched sufficiently to justify featuring. The Steward is also responsible for providing leadership to the Channel community. It is the responsibility of the Steward to monitor updated and new data resources submitted to Geospatial One-Stop so that resources of value are featured appropriately and channel content remains current.

1.3. Channel Steward Authority

To fulfill the responsibilities presented above, the Channel Steward is empowered with specific operational authorities. While the Channel Steward may choose to solicit input from the Channel Community, the Steward serves as the final authority on:

- features, datasets, or other content that appear in the channel for which the Steward is responsible
- selection of a team of Channel Contributors that form the advisory nucleus for the channel and can nominate candidate data resources within GOS to the Steward for featuring in their channel
- option to establish sub-channels and select a team of Sub-Channel Managers that report directly to the Channel Steward.

The Channel Steward can utilize the Channel Steward Administration tools to manage the channel operational capabilities of Channel Contributors and Sub-Channel Managers. A login feature within GOS enables the selected Contributors and Sub-channel managers to register on GOS so that they may be authorized with these authorities.

1.4. Channel Steward Assessment

Channel Steward performance is primarily assessed by the success of the channel. Successful channels are those with:

- active Channel Communities
- frequent access and data downloads
- frequent changes in the featured products for event-driven channels
- strong variety of content type (data, events, funding opportunities, etc.)
- content that represents the full spectrum of the Channel Community
- content that is current and accurate
- positive user feedback.

While no formal assessment is made of individual Channel Activity, it is expected that feedback comments and general web-monitoring statistics will provide some

indication of both successful Channels and Channels with performance problems. Channel Stewards wrestling with performance problems will be provided technical assistance and guidance from the GOS administration. If improvements to the Channel are deemed overly burdensome by the Steward, or are not implemented for other reasons, a new Steward will be selected for the Channel at the discretion of the GOS Administration. In addition to oversight and guidance, the GOS Administration intends to provide Channel Stewards some form of annual recognition and/or reward.

1.5. Layout of a Typical Channel

There are three general types of features within a channel that the Channel Steward can control a) Navigation links on the left side of the channel page b) data resource featured content within the Channel homepage, and c) sub-channels featured within the Channel homepage.

The Channel Steward is free to 'personalize' the channel content to best reflect the interest of the Channel Community within the constraints of the GOS channel template.

a. Channel Navigation Links

The upper left corner of each channel "home page" has 14 navigation links. Three are mandatory and form the core navigation links common to all channels.

The mandatory links are:

- Live Data and Maps - resources selected by the Channel Steward, Channel Contributors, and/or Channel Community as of special interest or value
- About this Channel - description of the channel and examples of data topics addressed by the Channel
- Help - links to 'Data Category and Topics Page Help'

There are 11 additional links that are optional:

- Downloadable Data
- Applications
- Other Resources
- Standards (available information on related geospatial or thematic standards)
- MarketPlace and Partnerships
- Grants and Funding
- Events/Hot topics/News
- Models and Advanced Applications
- Websites of Interest
- Tools
- Best Practices

GOS Portal channel tools for managing content within these navigation links are provided to the Channel Stewards. These tools are web-enabled databases within GOS that give the Steward the ability to populate, order, and otherwise control the content, function, and appearance of the content within the navigation links. The tools are password controlled so that the Steward, the designated Steward backup, and/or Sub-Channel Managers can have exclusive access.

b. Channel Featured Content

The heart of each channel home page is the central area where data resources are featured. The Channel Steward can manage the content of this feature area using a password controlled suite of web-based screens to:

i. Actions that are done once or on rare occasions

- Create additional topic headings (blue bars) within the predefined channels to help organize the information within a section (e.g. if you had a lot of websites you were referencing in the 'Websites of Interest' section you could organize them under headings such as: Federal Websites, Organization Websites, State Websites, etc.)
- Create sub-channels as needed
- Create a short introductory description about the channel or sub-channel
- List the keywords that describe the channel or sub-channel
- Create a long description about the channel or sub-channel

ii. Actions that are done routinely

- Identify existing metadata records within the portal to be featured in the channel
- Add data or information not in the portal by entering a textual description and optional URL
- Arrange and sequence the selected records and information into the predefined channel links (section) described above

In addition, the Channel Steward can use the administrative tools to assign/un-assign nomination privileges to Channel Contributors allowing them to nominate existing metadata records from the Portal holdings for consideration for featuring on the channel. Email and other tools should be used as needed to vote on nominated resources, and to do other peer collaboration functions necessary for sustaining a successful channel peer community.

c. Sub-Channels

Channel stewards can create a set of sub-channels to further organize channel content and distribute channel management. This feature is most beneficial to those Channels with broad subject matter that represents multiple professional interests such as the 'Cultural, Society, and Demographic' Channel and it's requirement to address demographic, sociological, criminal justice, and public safety interests.

If the Channel steward determines that sub-channels are needed to support the Channel Community, the Steward utilizes the GOS portal channel tools to establish and entitle the sub-channels and to assign management rights to a Sub-Channel Steward. Once assigned, the Sub-Channel steward has access to the full suite of the GOS Portal channel management tools and can customize the featured content of the Sub-Channel site.

The Channel Steward is responsible for managing and supporting Sub-Channel Stewards by establishing communication with and among the Sub-Channel Stewards and for setting basic management procedures for Sub-Channel featured content selection and sub-channel content review and maintenance.

1.6. Strategies for Building Channel Content

GOS Channels are intended to serve as a cooperative marketplace for the exchange of data and information including, but not limited to, the following:

Data resources

- live maps and applications
- available data resources such as downloadable data, map images, offline data, etc.
- planned data acquisitions and partnership opportunities
- Information resources
- About this page
- models and advanced applications
- standards
- websites of interest
- tools such as metadata creation tools, theme relevant analysis tools, and other data tools of interest to the channel's community of users
- publications such as newsletters, research studies, and best practices
- grants and funding
- meetings and events
- news.

The Portal Catalog is populated with metadata in any of three ways (in order of preference):

- automated harvesting of existing geospatial metadata records from registered collections/clearinghouses
- upload, by external participants, of their existing metadata to the GOS portal
- manual creation, by external participants, of metadata using the GOS portal metadata publication tool.

All of the metadata within the GOS Catalog can be browsed, searched, and selected as resources of special value to be 'featured' within the Channel. It is the responsibility of the Channel Steward to develop the strategy that works best for him/her and the channel contributor team for selecting content.

The following strategies are suggested for initial consideration and may be implemented singularly or in a staged approach. However, Channel Stewards are strongly encouraged to generate individual strategies that best utilize and serve the Channel Community. Suggested options include:

- Channel Steward actively solicits the entire channel community to nominate content using the Administration tools provided
- Channel Steward initiates an independent effort to review the GOS metadata collection and select content.

1.7. Criteria for Adding Featured Resources

Each channel in the Geospatial One-Stop Portal represents a user community with potentially unique data requirements. It is up to the Channel Steward to determine the criteria for selecting data to feature within the channel. At a minimum, all data resources featured within a channel must:

a. Have metadata that describes the resource as follows:
    - FGDC compliant metadata registered in the GOS Catalog, or
    - If the metadata is not registered or not appropriate to be registered (a web site of interest with no geospatial data), the Channel Steward can enter a textual description and a URL using the “External Link” channel tool, or
    - If the data resource metadata needs to be added due to an emergency or time critical event, contact the data owner to have them to enter the metadata or to request approval for the Channel Steward to enter the metadata using his/her regular GOS publishing account until the new data resource’s owner has registered as a GOS publisher. Once the owner registers, then the metadata record can be transferred to their account.

b. Be of known/stated reliable quality, preferably with a reliability statement included in the metadata associated with the data set. There is no minimum quality required, but the quality of the resource must be understood by all who use the information for making business decisions based upon them.

The Channel Steward may decide to use additional criteria for featuring data resources in the channel. These might include elements of uniqueness, interactive capabilities, or respectability in terms of being considered the quintessential resource for that particular geospatial information. One of the goals of the channels is to provide “two clicks to content” access to what the community has identified as the best content for the category or cross-cutting application/event. Regardless of the criteria, it must be formalized so that Channel Contributors as well as end users understand why certain data are featured, while others are not. It is anticipated that there might be commercial or political pressures put on the Channel Steward to

feature data resources. A clear set of documented criteria will enable the Steward to make decisions that are reasonable and fair.

1.8. Channel Review and Update

Channel Stewards are expected to regularly review the Channel to ensure that all content is:

- applicable to the channel
- current (especially event notices)
- operational (especially URLs)
- complete.

In addition, Channel Stewards are encouraged to regularly update the featured content. While some resources are considered 'gold standards' that users will expect to always find among the featured content, the Channel Steward is encouraged to seek content that may be of special interest due to its timeliness (event or season), innovative nature, or unique character. Special interest resources should change on a regular basis to keep the content fresh and encourage frequent visits by the Channel community.

1.9. Creating and Fostering Channel Communities

Channel Stewards are encouraged to establish a core team of Channel Contributors to aid in the development of the Channel and the selection of featured content. Channel Contributor teams should be of a manageable size (6-12 members) and include individuals that represent the scope of the Channel topic areas and diverse organizational types. The Channel Steward is encouraged to compile and circulate contact information for all Channel Contributors, establish a regular telecon meeting schedule for the Channel Contributors, and to generate objectives and tasks for the Channel Contributor team.

Once established, the Channel Contributors should perform outreach to encourage participation in GeoData.gov by others in the professional community. If there is strong interest in the Channel, the Channel Contributors should consider engaging the Channel Community in numerous activities including:

- publish information about their own Channel related data and information resources
- nominate content to be featured within the Channel
- report expired content, non-operational URLS, and publishing problems.

Suggested methods for outreach to the Channel Community include:

- professional listservers
- direct contact with peers
- presentations at conferences and events
- promotion of your role as a GOS Channel Steward in your own organizational outreach materials and web-sites.

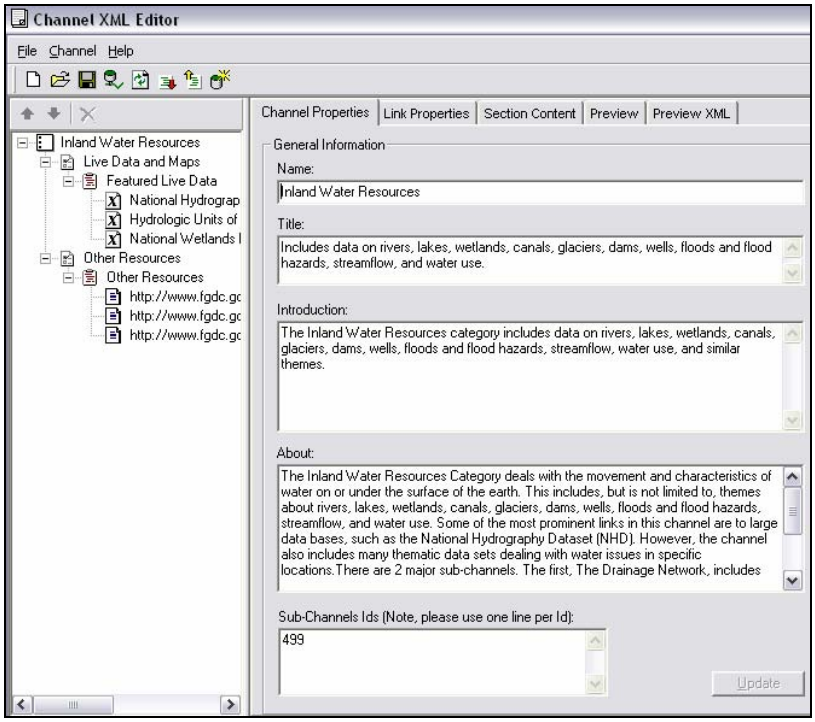
Overview of Channel Steward Tools - Desktop and Web

This document provides Geospatial One-Stop (GOS) Channel Stewards a step-by-step guide to performing tasks using the Web tool and Desktop tool. For information regarding the role, responsibilities, and tasks of Channel Stewards, refer to Section 1 of this Handbook.

Uses for the Two Different Tools

In general, use the Desktop Channel XML Editor tool to manage the content of the channel, such as adding records and links. The Administrative Channel Management Web tool should be utilized for managing the administrative aspects of the channel, such as adding stewards and contributors.

Desktop Channel XML Editor Tool



Use the Desktop tool to:

- Download channels
- Check in and check out channels
- Arrange the order of the content
- Edit the name, title, introduction text, and about text
- Edit links and their properties
- Add records to sections
- Add external links
- Add sub-channels

To open the Desktop Channel XML Editor Tool, go to:

→ Start
→ All Programs
→ ESRI
→ Channel Management
→ XML Editor

Administrative Channel Management Web Tool

Use the Web tool to:

- Assign stewards and contributors
- Download the latest version of the desktop tool
- Update channel content on the server
- Rollback to an earlier version of the channel

To access the Administrative Channel Management Web Tool:

- Go to www.geodata.gov
- Click the log in link on the bottom of the left menu and log in
- Close the new window that opens and refresh the home page
- Clicking the Manage Channels link at the bottom right of the page will take you to the Administrative Channel Management Web Tool
- Click the Download Latest Tool link on the left menu.
- If you already have a version installed, make sure to uninstall it before installing the latest version. For instructions on installing and uninstalling, read the

	installation guide included with the setup file of the new tool.

Overview of Channel Management Procedures

Procedures for Managing Channels

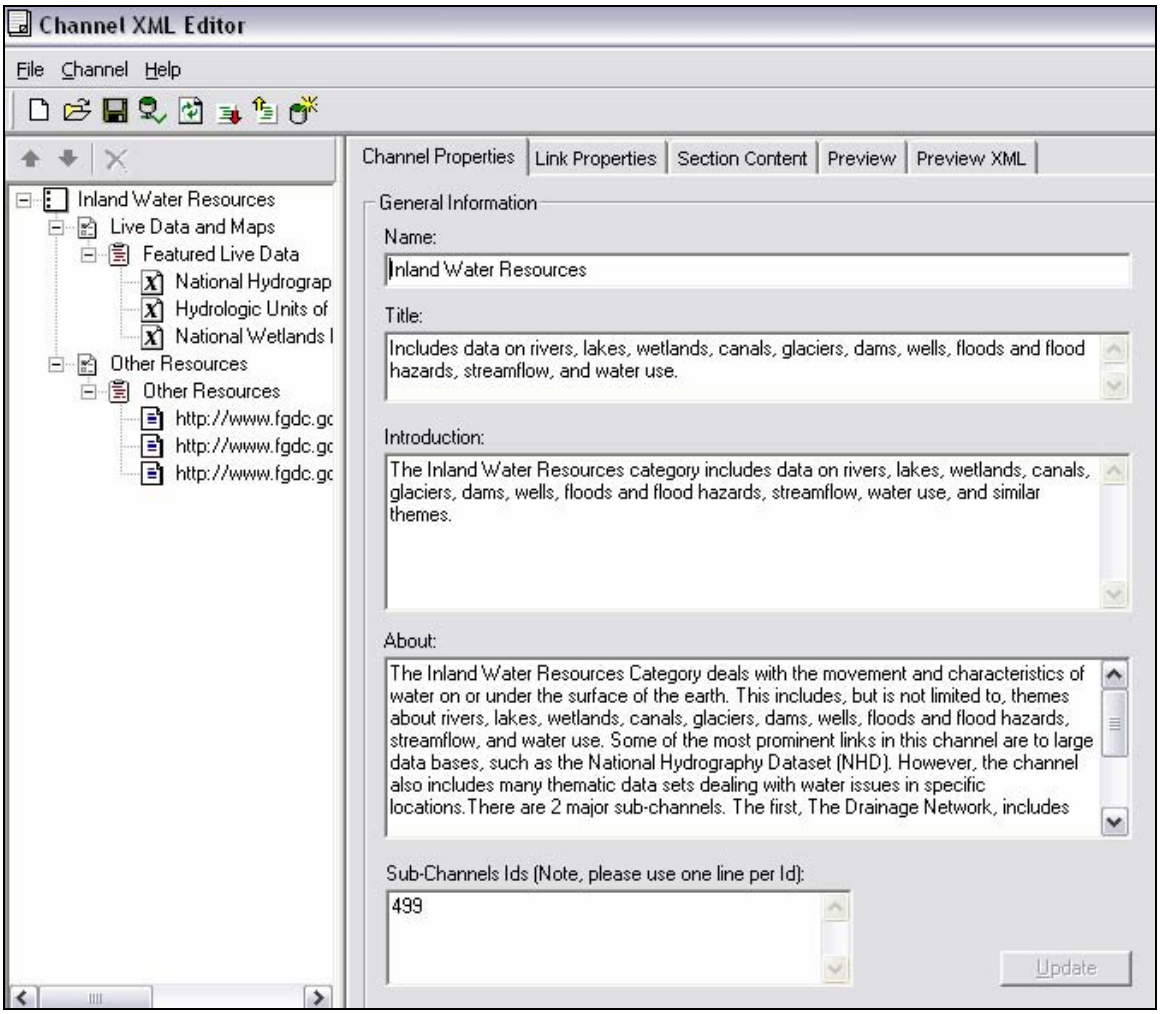
For New Channel Stewards
All channel stewards must have an account on geodata. If you do not have an account, please create one.

Create an Account on the GOS Portal

a. Go to www.geodata.gov and click the Login link located near the bottom of the left menu bar.
b. Read the registration instructions, disclaimer, and privacy statement.
c. Click REGISTER ONLINE NOW!.
d. Fill out the form; the bold fields are required.
e. Click create my geodata.gov account.
f. An e-mail will be sent to the account you entered. Follow the instructions.
g. After logging in for the first time, read the Statement of Agreement, and if you agree to the terms, click I Accept.
h. Complete the form; the fields marked with an asterisk (*) and in yellow are required.
i. Click SUBMIT PUBLISHER INFORMATION to complete registration.

1. After you have created an account, contact the Geodata Administrator and let them know your GOS username and the channel for which you will be steward. The administrator will notify you when your channel is activated.
2. Log into your account on the GOS Portal (Section 3.1).
3. Download the latest version of the desktop tool (Desktop Channel XML Editor tool).
4. Make updates to your channel using the Desktop Channel XML Editor tool.
   a. Start the Channel Editor Desktop tool and log in (Section 2.1).
   b. Obtain the channel you wish to edit either by downloading it or checking it out. These can be accomplished using either tool, but it is advisable to use the Desktop tool.
      - Desktop tool: Download (Section 2.2) Check Out (Section 2.3)
      - Web tool: Download (Section 3.2) Check Out (Section 3.3)
   c. Edit the channel (Sections 2.5-2.11)
   d. Upload your revised channel to the server by checking it in using either the desktop tool (Section 2.3) or the web tool (Section 3.3). Again, using the desktop tool is recommended.
5. Your channel updates will be automatically loaded to the staging server every four hours starting at 8:00AM PT. You can view your changes on GOS staging by going to http://gosstg.esri.com/gos. Your channel updates will go live on production every evening between 9 and 10PM.

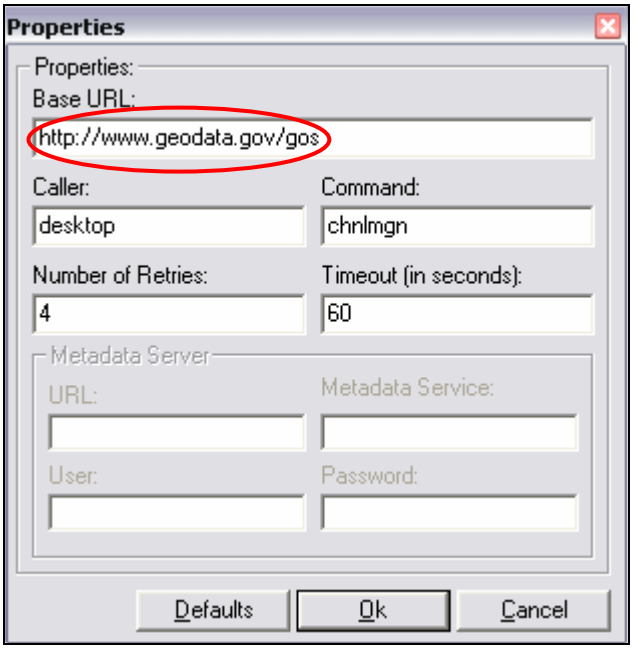
Desktop Channel XML Editor Tool Functions



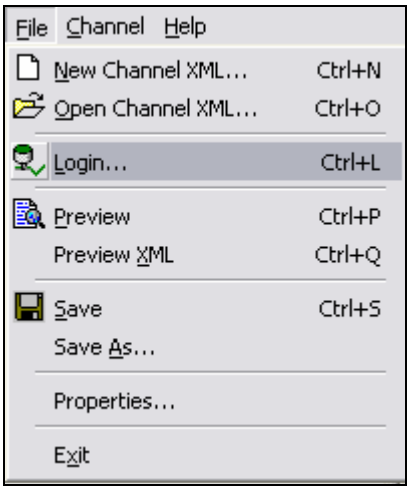
2.0 Desktop Channel XML Editor Tool Functions

2.1. Logging In

a. Go to Start → All Programs → ESRI → Channel Management → XML Editor to run the Desktop Channel XML Editor tool.
b. Verify that you are logging in to the correct server. Go File → Properties. The Base URL should be the one for the website.



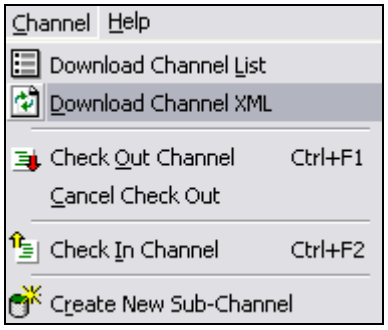
c. Log in to the server by clicking on the login icon, pressing CTRL+L, or going to File → Login.



2.2. Downloading Channel XML Files for Editing

a. It is possible to download and edit channels without checking them out. This is useful if the file you want has been checked out by another user. However, the revisions you make will not be saved. You could also download if you want to simply view metadata and not make any changes.

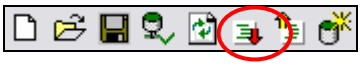
b. Go to Channel → Download Channel XML.

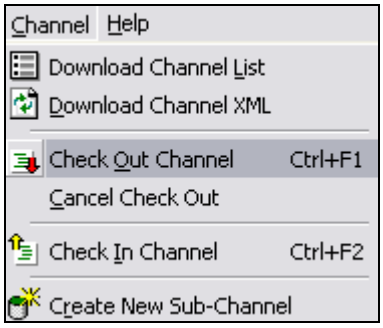


c. Select the channel you want to download from the drop-down menu and click OK.

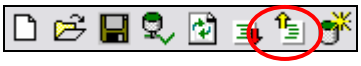
2.3. Checking Channels Out/In

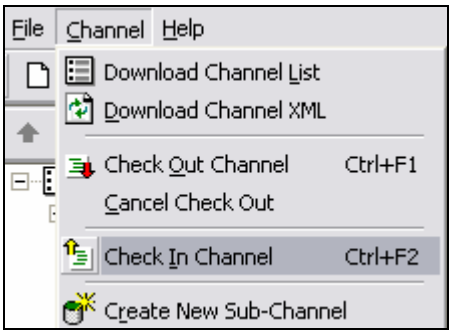
a. Check out the channel by clicking on the check out button on the toolbar, pressing CTRL+F1, or going to Channel → Check Out channel.





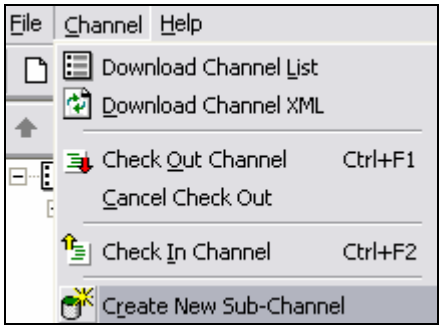
b. Make sure that the file to check in is open in the Channel Editor. When you have finished editing the channel, check it in by clicking on the check in button on the toolbar, pressing CTRL+F2, or going to Channel → Check In Channel.



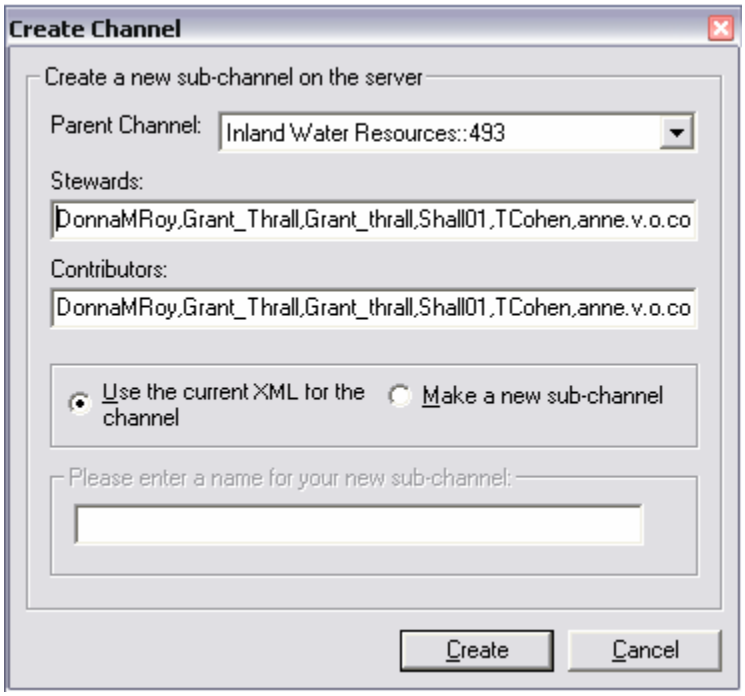


2.4. Creating Sub-Channels

a. Click on the Create Sub-Channel icon or go to Channel → Create New Sub-Channel.



b. Here you can set the options for your new channel.



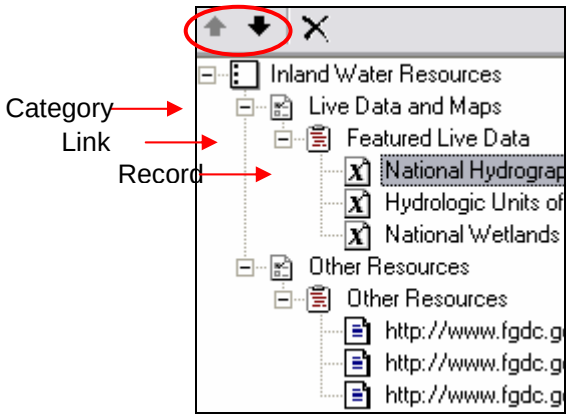
- Parent Channel
  Select the parent channel for the sub-channel. Only channels for which you're a steward are available on the drop-down menu.
- Stewards/Contributors
  The Stewards and Contributors fields contain all available usernames by default. Delete the ones from the appropriate fields who you do not want to be steward or contributor.

- Options
  Determine the method of creating the new channel. Select “Use the current XML for the channel” if XML already exists for the channel and it is now open in the channel editor tool. Select “Make a new sub-channel” to create a blank channel.
- Name
  Enter a name for the sub-channel if you are creating a blank channel.

2.5. Arranging the Order

a. You can rearrange the order of the content on your channel in two different ways:

   i. Select the record, section or category that you want to move. Click on the up or down arrow. If the record is the first listed in the section, such as it is in the figure, only the down arrow is enabled. If it is the last then only the up arrow will be enabled.

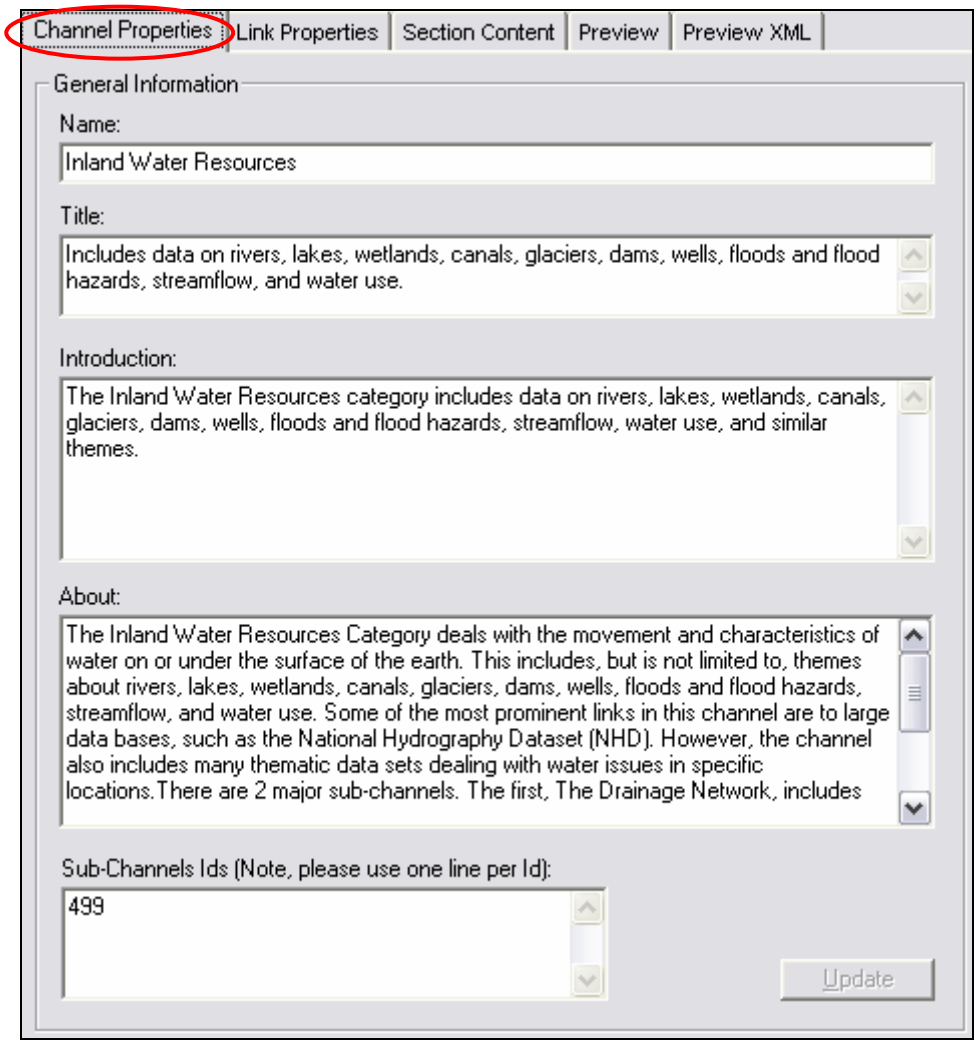


   ii. Drag the record, link or category up or down.

b. Note: You can only arrange the order of the content within the same part of the channel, i.e. you cannot move a record to another link section, and you cannot move a link section to another category.

2.6. Editing Channel Properties

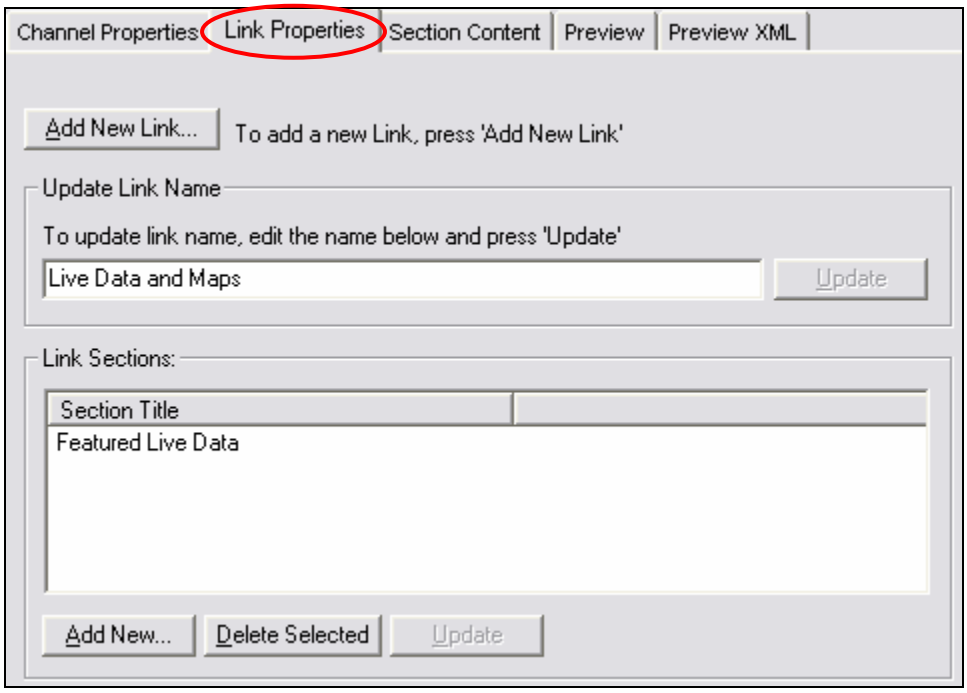
a. Click on the Channel Properties tab.
b. Here you can edit the name, title, introduction text, and about text of the channel.



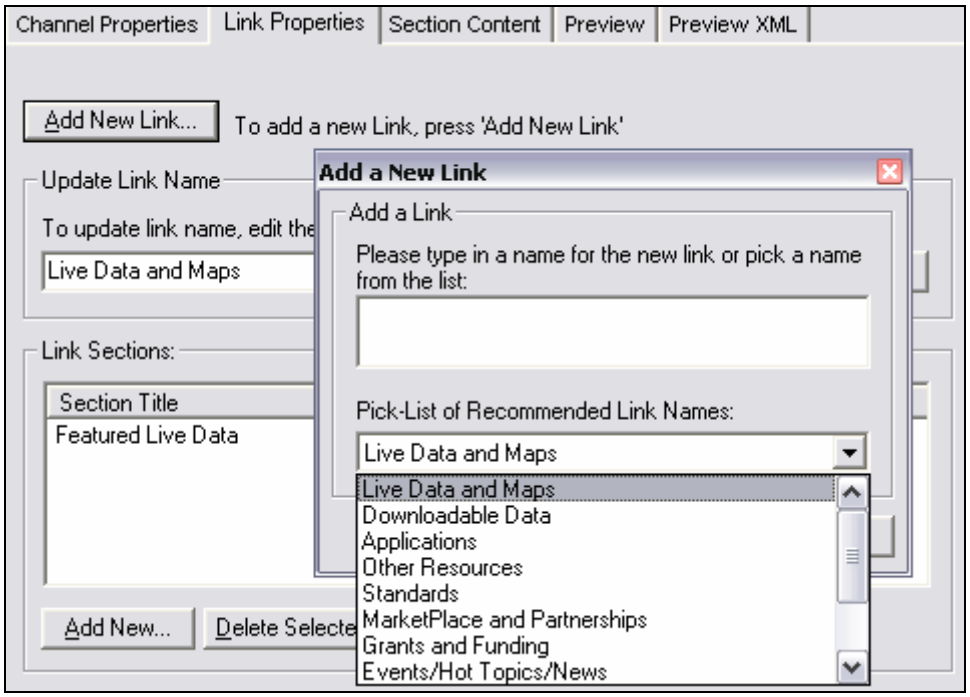
c. To add a sub-channel, note the ID of the sub-channel to be added and put it on the list of sub-channel IDs- one line per ID. (One way to find the channel ID: go to Channel → Download Channel XML. Look on the list for the channel you want to add as a sub-channel. The channel ID is the number after the double colons. Click on Cancel.)
d. To remove a sub-channel, delete its ID from the Sub-Channels ID list.
e. Click on the Update button if you've edited any of the fields.

2.7. Editing Link Properties

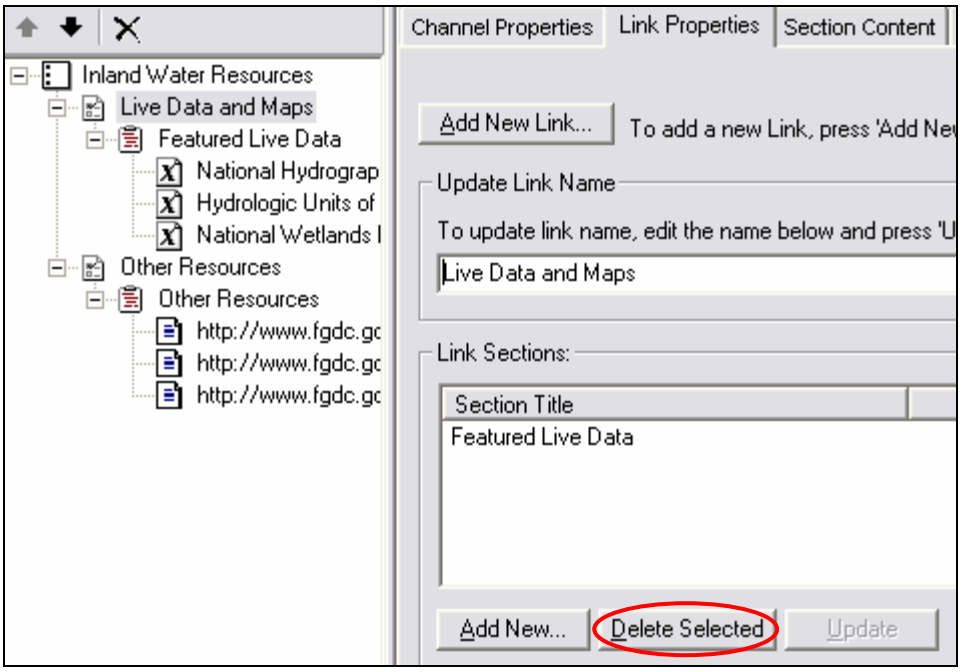
a. Links to different categories are listed on the left side of the channel page. You can edit them or add new ones by clicking on the Link Properties tab.
b. Here you can add or edit the link categories and sections.



c. To add a new link, click the Add New Link… button. There is a list of recommended category names. You can pick one from the list, or type in your own.



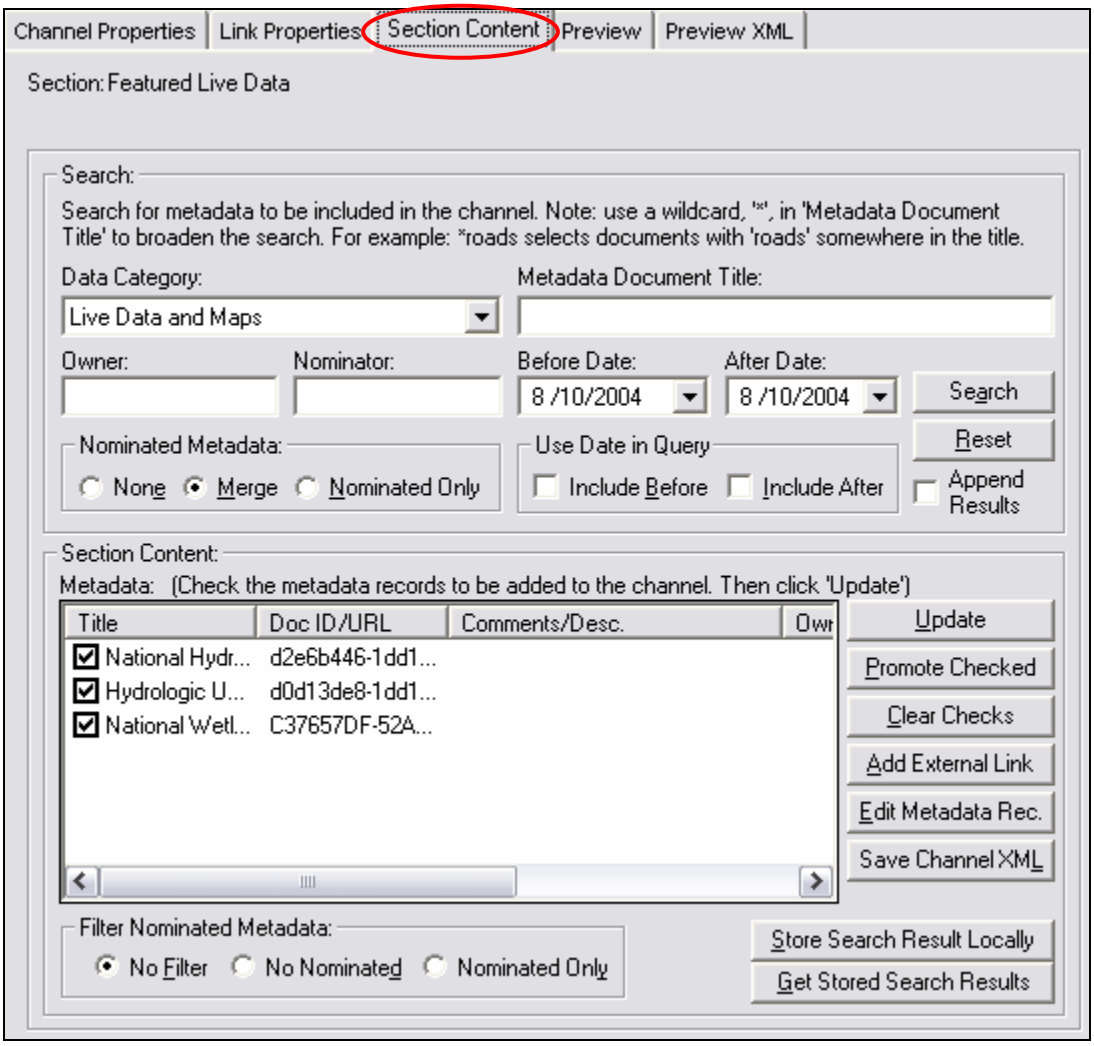
d. To change the title of the link, edit the text within the field in the “Update Link Name” area and click the Update button.
e. To add a new section, click the Add New button on the bottom of the screen. Type in the name of the new section and click Add.
f. To delete a section or link, select it from the box where sections are listed and click Delete Selected. Note: Deleting a section or link will delete all of the records within that section.



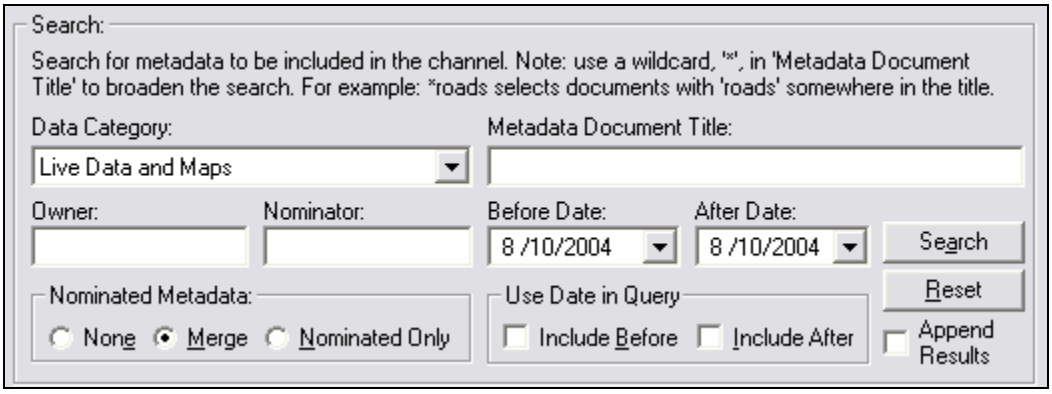
g. To rename a section, click on the record from the list to select it. Click it once again and the field will become editable.

2.8. Editing Section Content: Searching for Metadata

a. Each link on the Channel page is broken up into sections. The sections provide a separation between the different metadata and stand out as blue headers on the channel page. The search function searches through all of the metadata in geodata.gov, not just metadata within the current channel. Click on the Section Content tab.



b. The top half of the Section Content screen is dedicated to searching for metadata to be included in the channel.



- Data Category
  This is a mandatory field. Metadata are classified by categories. Select what kind of data you are looking for. The default is Live Data and Maps.
- Metadata Document Title
  This searches only within titles of metadata, not keywords or themes.
- Owner
  If you want to search a specific user's records, enter their geodata.gov username in this field. It must be exact; however, it is not case sensitive.
- Nominator
  Enter the GOS username of a steward or contributor here to see only records that a specific user has nominated. Again, spelling must be exact.
- Before/After Date
  Specify the date when you last looked at a record. These values default to today's date. For example, if you wanted to see what records have been added since you last searched two weeks ago, select the date you last searched in the After Date field. Then check the "Include After" box below. Make sure to check the appropriate checkboxes within the Use Date in Query section.
- Nominated Metadata
  This is a mandatory field. You have the option of searching only records that have been nominated, records that haven't been nominated ("None" option) or both ("Merge" option).
- Use Date in Query
  See "Before/After Date".
- Append Results
  Check this box if you search multiple times and want the results of all searches. If this box is unchecked, then records found in previous searches will disappear, except for the ones that have a check next to their names.

c. Click the Search button once you have entered all of your criteria.
d. In between searches, make sure to click the Reset button. Also, if the search functionality is not working, clicking Reset may resolve the issue.

Channel Properties | Link Properties | Section Content | Preview | Preview XML

Section: Featured Live Data

Search:

Search for metadata to be included in the channel. Note: use a wildcard, '*', in 'Metadata Document Title' to broaden the search. For example: *roads selects documents with 'roads' somewhere in the title.

Data Category: Live Data and Maps

Metadata Document Title:

Owner:

Nominator:

Before Date: 8 /10/2004

After Date: 8 /10/2004

Search

Reset

Nominated Metadata: None | Merge | Nominated Only

Use Date in Query: Include Before | Include After

Append Results

Section Content:

Metadata: (Check the metadata records to be added to the channel. Then click 'Update')

Title	Doc ID/URL	Comments/Desc.	Owr
☑ National Hydr...	d2e6b446-1dd1...		
☑ Hydrologic U...	d0d13de8-1dd1...		
☑ National Wetl...	C37657DF-52A...		

Update

Promote Checked

Clear Checks

Add External Link

Edit Metadata Rec.

Save Channel XML

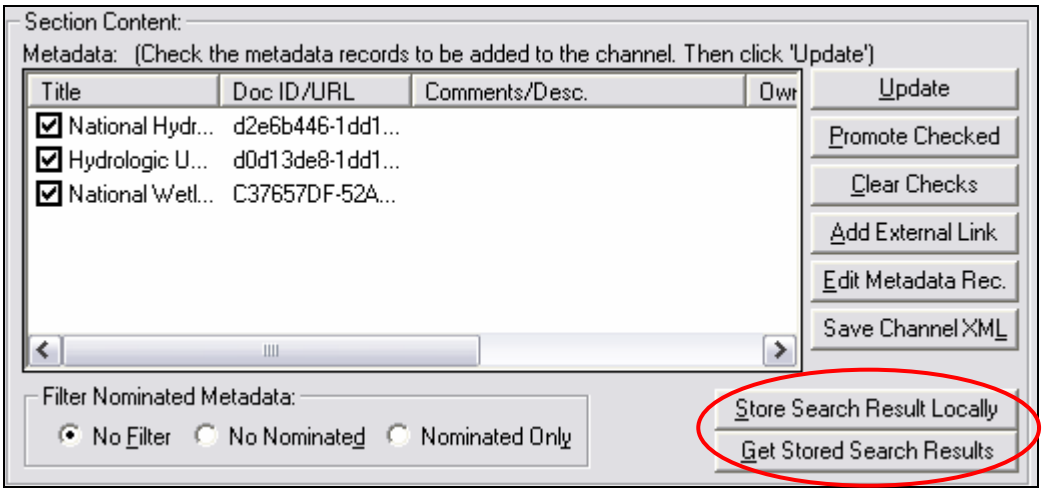
Filter Nominated Metadata: No Filter | No Nominated | Nominated Only

Store Search Result Locally

Get Stored Search Results

2.9. Editing Section Content: Saving/Loading Search Results

a. Records matching your query will be shown in the bottom half of the Section Content screen. If you don't want to add content to your section yet, you can save search results for later use. Click on the Store Search Result Locally button.

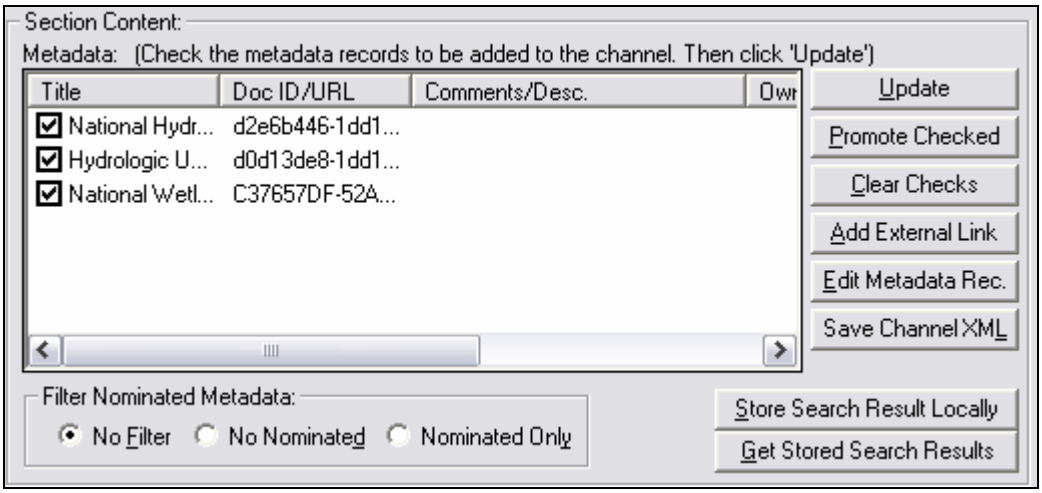


b. Save your file, which will be in XML format.

c. When you want to load your search results, click the Get Stored Search Results button.

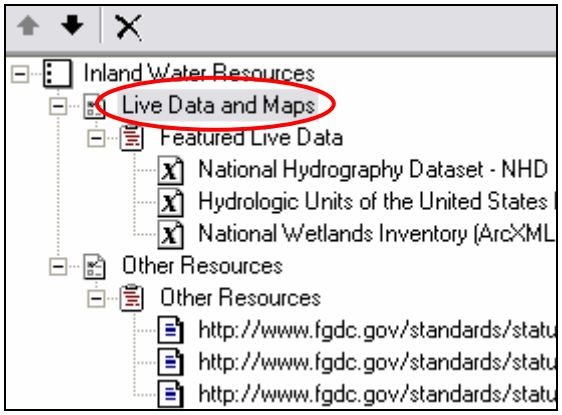
2.10. Editing Section Content: Adding Records to Sections

a. Once you've searched for records, you can add any number of them to sections.

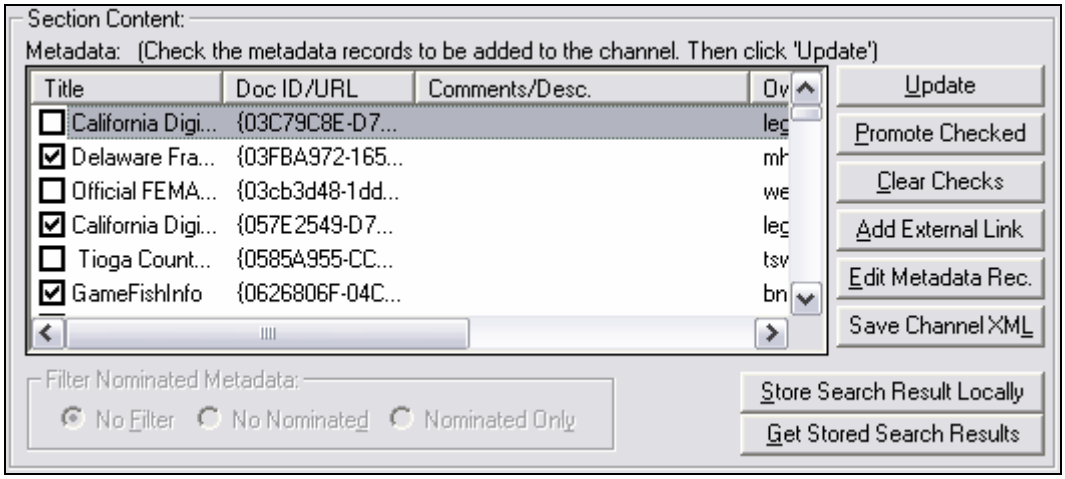


b. If you want to see only records which matched your criteria but were not nominated, select the "No Nominated" button. If you want to see only records which were nominated and matched criteria, select the "Nominated Only" filter. The default is for no filter, which means all records matching the criteria will be shown.

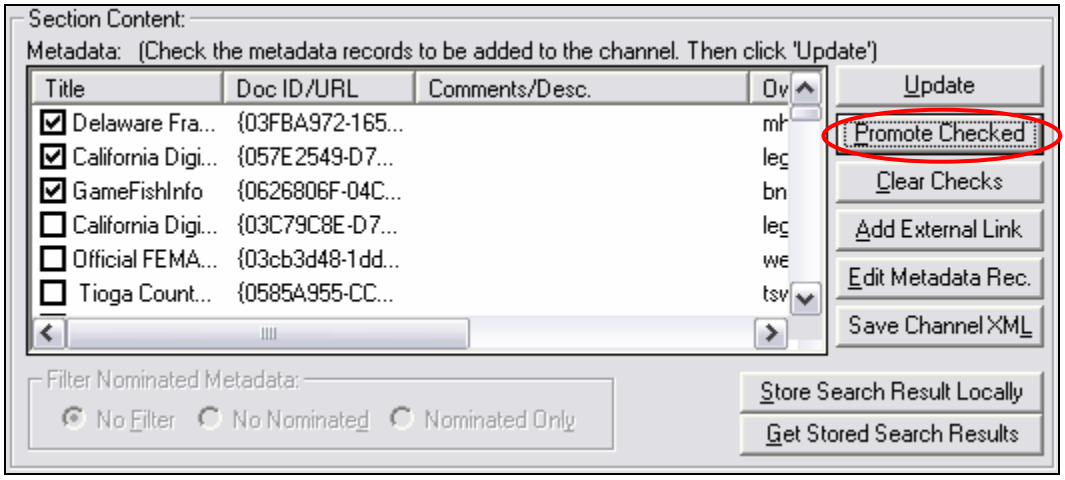
c. Make sure that the section where you want the record to be in is selected in the left menu.



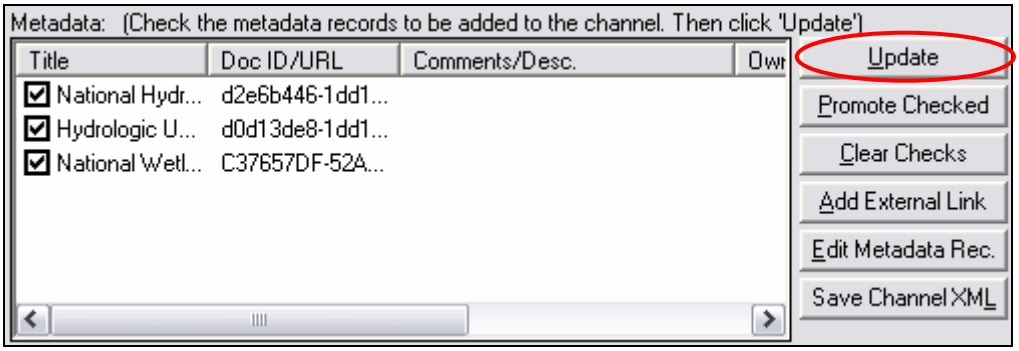
d. Check all of the records that you want to add to that section. If you do another search, all records that are checked will remain on the list, whether or not the "Append Results" box is checked. For example, in the following figure, the three records that are checked will be added once Update is clicked.



e. To easily view all of the currently checked records, click on the Promote Checked button. This will bring all checked records to the top of the list. The following figure is after the Promote Checked button has been clicked.

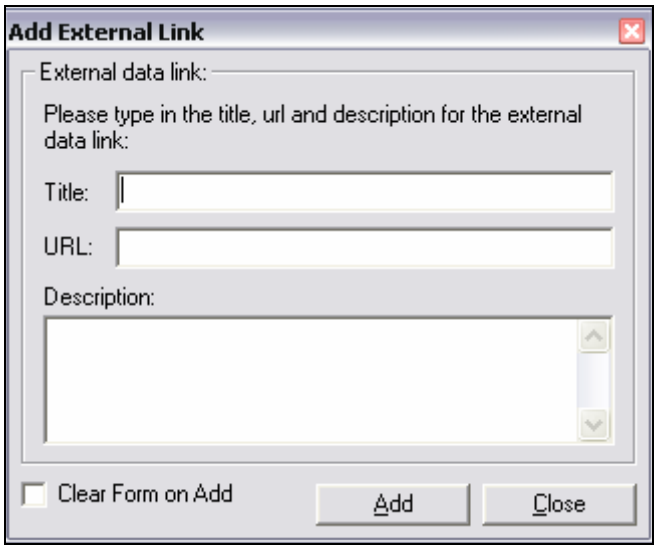


f. To view a record's metadata, double click its name in the search results box.
g. The Update button will become enabled when there are one or more new records selected. This button will add the checked records to the left side of the screen.
h. Note: Click the Update button if you have made any changes; otherwise, no modifications will be made.



2.11. Editing Section Content: Adding/Editing External Links

a. You can add links to sites that are not referred to in any GOS metadata. To do this, click the Add External Link button.

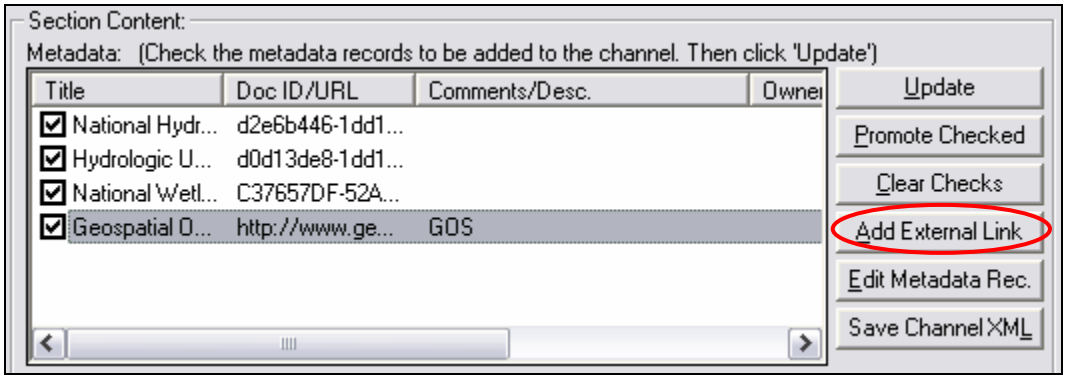


b. Specify attributes of the external link.
   - Name
     This will be the title of the link on the channel's page.
   - URL
     Enter the URL of the site.
   - Description
     The description will be shown as the content summary.
   - Clear Form Checkbox
     If you want to add multiple external links, check the Clear Form on Add box. This will set the fields blank after you add a link.

c. Click Add.

d. Now the new external link will be in the list of content. Make sure to click the Update button to put the new external link in the section.

e. Once the external link is created, you can edit it by clicking Edit Metadata Rec. You'll be able to revise the title, URL, and description.



f. Note: If you select a record that is not an external link and click the Edit Metadata Rec. button, you can update the Title and Doc ID, but it is unadvisable to do this.

2.12. Previewing

a. You can preview your channels page by clicking on the Preview tab. Make sure you have clicked the button to update your content and have saved your changes.

b. Note: The preview is of how the page would look with all the changes you have made, though they are not necessarily saved. Also, the channel's sub-channels will not be shown in the preview.

2.13. Working Offline: Editing Existing Channels

a. Open the file that you want to edit by downloading it (Section 2.2 or Section 3.2) or by checking it out (Section 2.3 or Section 3.3).
b. Click on the Section Content tab.
c. Click on the Save Channel XML to save the file onto your computer. You can now edit the channel using any XML editor, but in order to check it in, you must be logged in.

2.14. Working Offline: Creating New Channels

a. There are three different ways to create a new channel: click the New Channel icon, press CTRL+N, or go to File → New Channel XML.

b. Go to File → Save As to save the file onto your computer. You can now edit the channel using any XML editor.

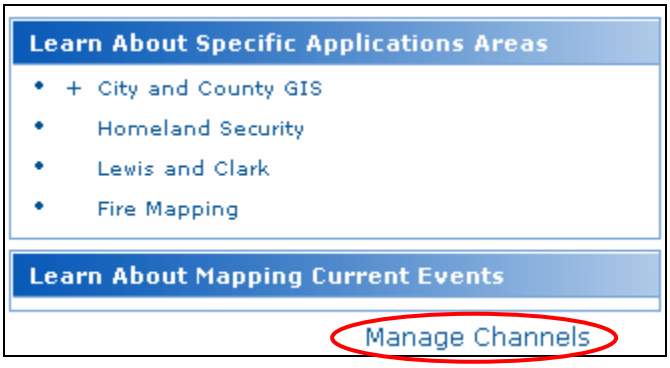
Web-based Administrative Channel Management Tool Functions

3.0 Administrative Channel Management Web Tool

3.1. Logging In

a. Go to the GOS portal (http://www.geodata.gov/gos).
b. Click “Login” under the Publish Data header on the left menu bar.

c. Log in under your geodata.gov username.
d. Refresh the home page. Note: Make sure you reload the page from which you initially entered the site.
e. Click on the “Manage Channels” link which is now at the bottom right of the page.

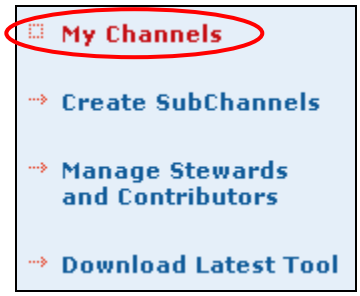


3.2. Downloading Channel XML Files for Editing

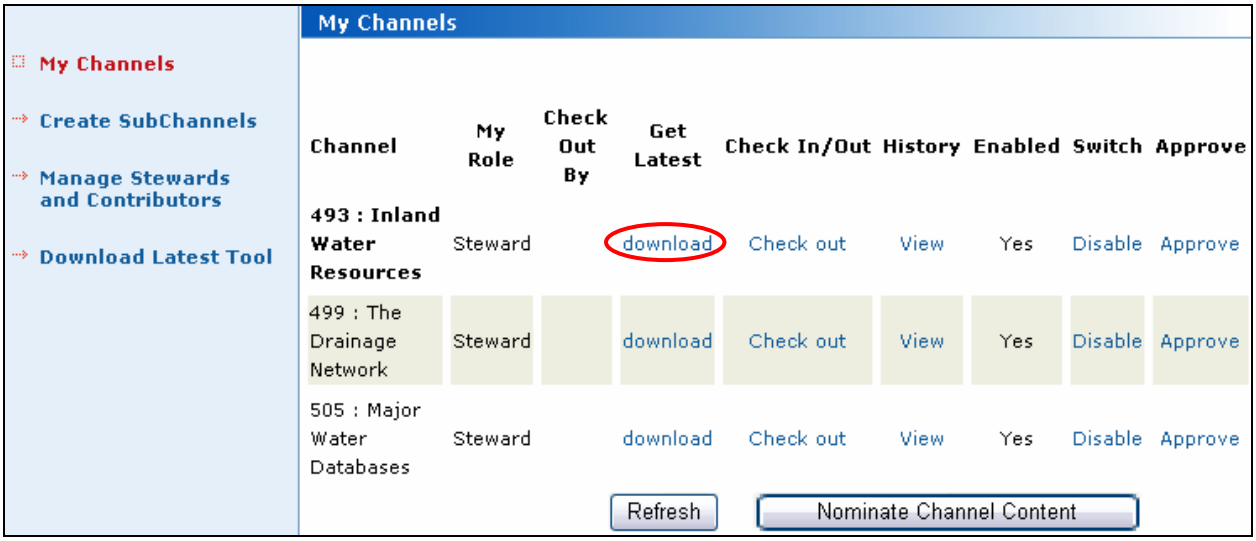
a. Note: While you can download XML files through the Web tool, it is recommended that you use the Desktop tool (Section 2.2).

b. It is possible to download and edit channels without checking them out. This is useful if the file you want has been checked out by another user or to simply view the metadata. The changes you make will not be saved on the server.

c. Go to the My Channels page by clicking on the “My Channels” link on the left menu.



d. Find the file that you want to download. You can only download channels for which you’re a steward.

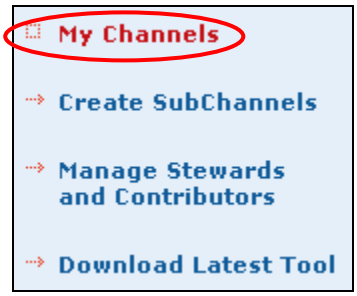


e. Click on the “Download” link that’s in the same row as the channel you want to download in order to download it. In the above figure, clicking on the circled link would download channel 493:Inland Water Resources.

3.3. Checking Channels Out/In

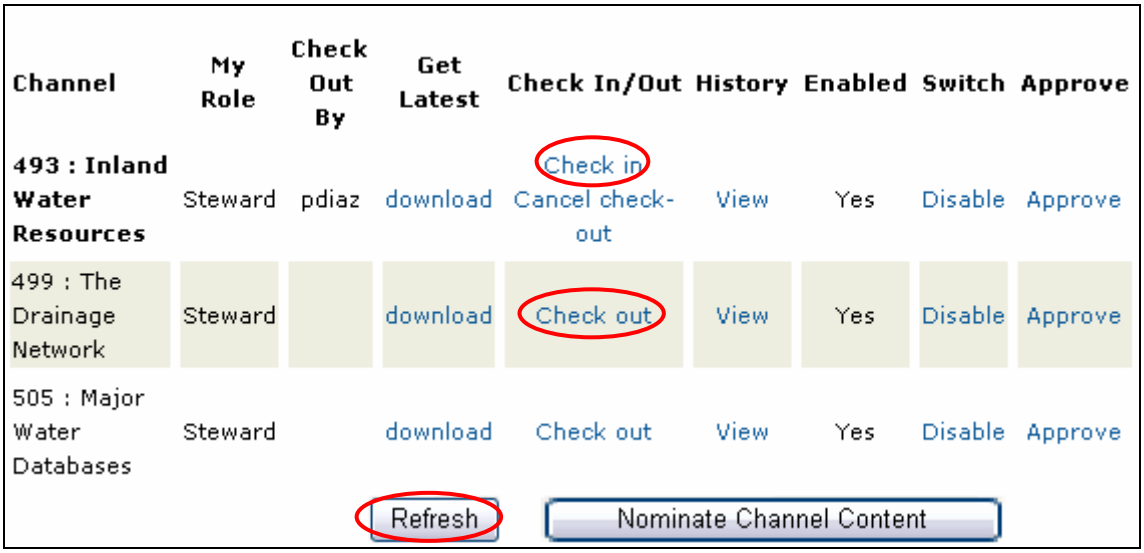
a. Note: While you can check channels out/in through the Web tool, it is recommended that you use the Desktop tool (Section 2.3).

b. Go to the My Channels page by clicking on the “My Channels” link on the left menu.



c. Find the channel that you want to check out. If it says “Check Out” in the Check In/Out column, you can click that link to check it out. Otherwise, the channel has been checked out by another user.

For example, in the following figure, Channel 493 has been checked out by pdiaz and therefore cannot be checked out by another user. The other channels are all available for checkout. Note: You may need to click the Refresh link at the bottom of the page before the “Check in” link becomes available.

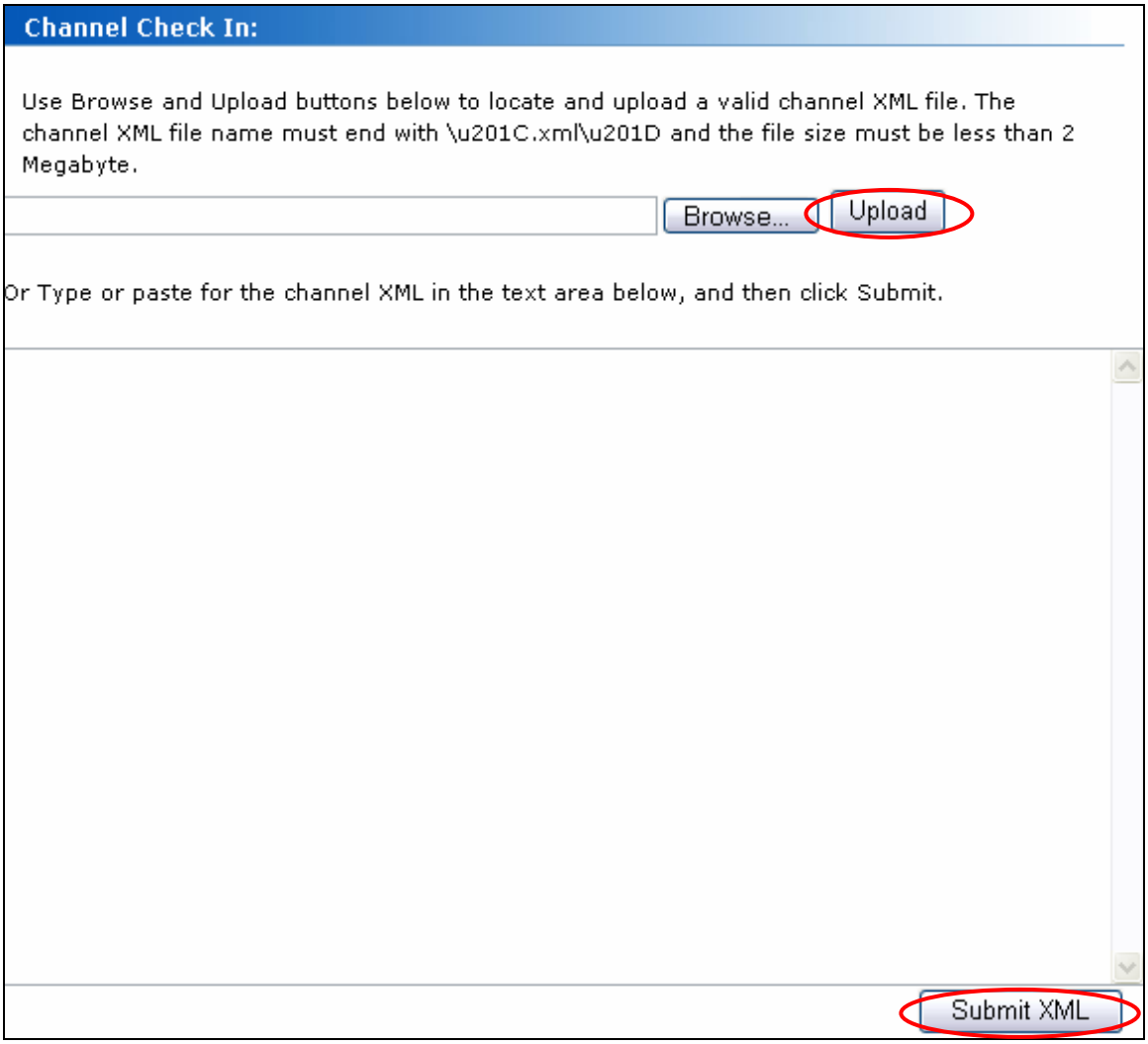


Channel	My Role	Check Out By	Get Latest	Check In/Out	History	Enabled	Switch	Approve
493 : Inland Water Resources	Steward	pdiaz	download	Check in Cancel check-out	View	Yes	Disable	Approve
499 : The Drainage Network	Steward		download	Check out	View	Yes	Disable	Approve
505 : Major Water Databases	Steward		download	Check out	View	Yes	Disable	Approve

Refresh Nominate Channel Content

d. When you have finished editing, click the “Check In” link that is on the same row as the updated channel. Note: Clicking the “Cancel check-out” link will allow stewards of the channel to check it out, without any of the changes you’ve made being saved.

e. After you click “Check in”, the following screen appears:



i. If you want to submit the metadata by uploading, click the Upload button after entering the path to the channel file.

ii. If you want to submit by copying and pasting, paste the XML into the text area and click the Submit XML button.

f. Note: There is no delete function on either of the channel tools. If there is a channel that you do not want to put on the portal, go to the Switch column and click “Disable”. In the following figure, Major Water Databases was accidentally duplicated. We have disabled the second one, so only one copy of the channel is on the portal. Click the “Enable” link to move the channel back onto the portal.

My Channels

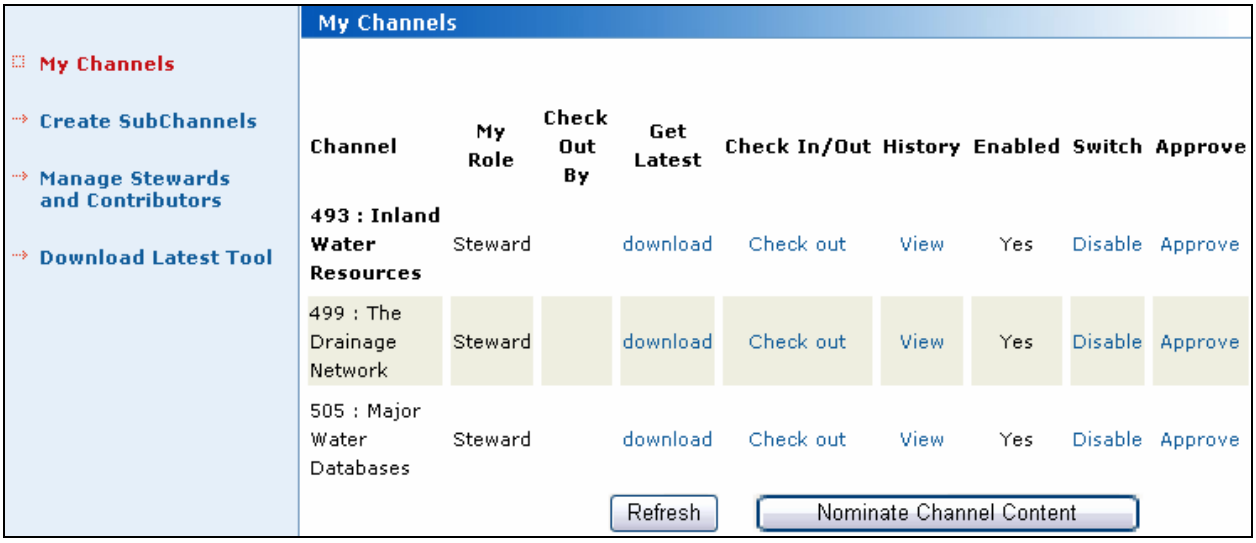
Channel	My Role	Check Out By	Get Latest	Check In/Out	History	Enabled	Switch	Approve
493 : Inland Water Resources	Steward		download	Check out	View	Yes	Disable	Approve
499 : The Drainage Network	Steward		download	Check out	View	Yes	Disable	Approve
505 : Major Water Databases	Steward		download	Check out	View	Yes	Disable	Approve
511 : Major Water Databases	Steward		download	Check out		No	Enable	Approve

Refresh Nominate Channel Content

3.4. Creating Sub-Channels

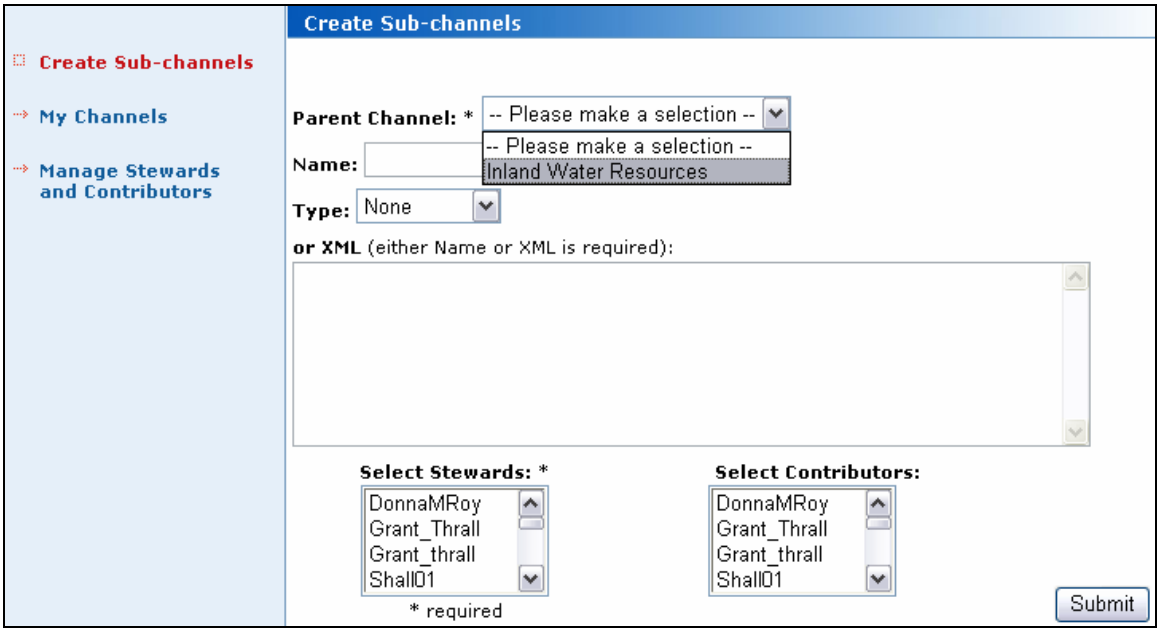
a. Note: Creating a sub-channel via the web tool requires editing the parent channel's XML file. It is advisable to use the Desktop tool to create a sub-channel (Section 2.4), especially if you are unfamiliar with XML.

b. Make sure that the parent channel has been uploaded and enabled by going to the "My Channels" page. A channel is enabled if it says "Yes" in the Enabled column. The channels in **bold** are root channels (e.g. Inland Water Resources). Channels not in bold are sub-channels.

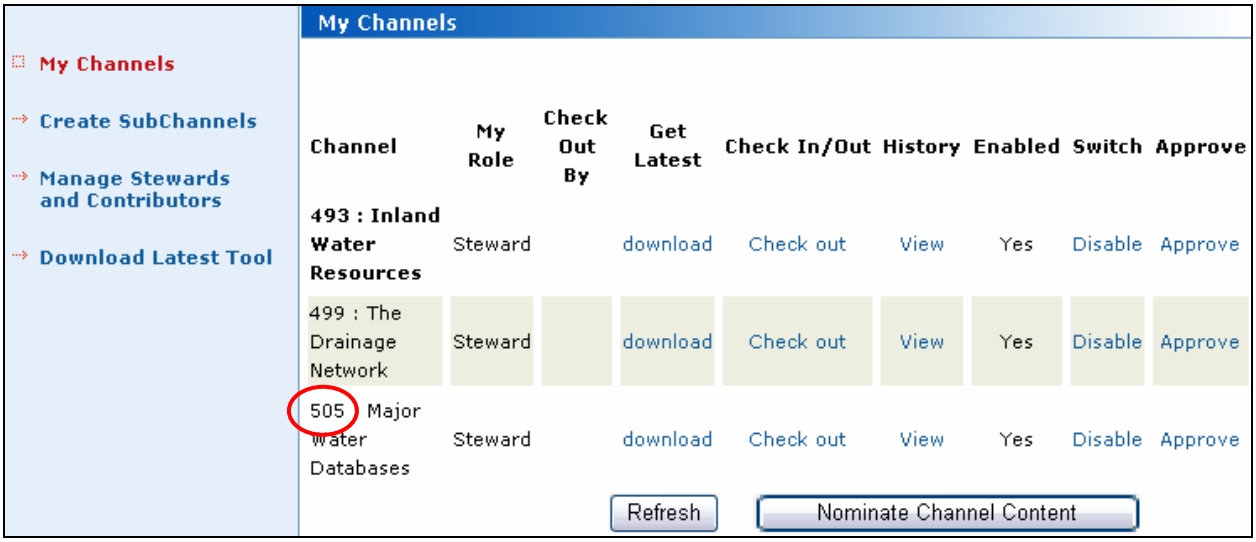


c. Go to the "Create Sub-Channels" page by clicking the link on the left menu bar.

d. For the Parent Channel field, select the channel to which you want to add a sub-channel from the drop-down menu. Only channels for which you're a steward are listed.



e. Enter the name of your new sub-channel and select its type from the list. See Appendix A for the different types of channels and naming conventions. Note: If you are creating a channel using an existing XML file, you do not need to enter a name.
f. Create a channel by using one of the following methods:
   i. If you have an existing XML file for the channel, copy and paste it into the XML box.
   ii. After entering a name for the sub-channel, you can leave the XML box blank, and assign a steward or contributors for the channel. This will result in a blank channel on the server, which the sub-channel steward can edit using the desktop tool.
g. Click Submit.
h. Note the channel ID assigned to the sub-channel, which is the number before the channel name. In this figure, the channel ID of the new sub-channel is 511.
i. You will need to update the parent channel to include the new sub-channel that was created. You can do this by using the XML Channel Editor tool (Section 2.6) or using an XML editor.



j. Check out the parent channel and open it in an XML editor. In the above figure, Inland Water Resources is the parent channel.

k. Look for the tag "<child-externallink url='xxx'>" within the XML. Replace "url='xxx'" with "id='yyy'" where yyy is the sub-channel's ID. This is what the parent channel metadata should look like after updating:

```
<channel-child>
   <child-externallink id="499"/>
   <child-externallink id="505"/>
</channel-child>
```

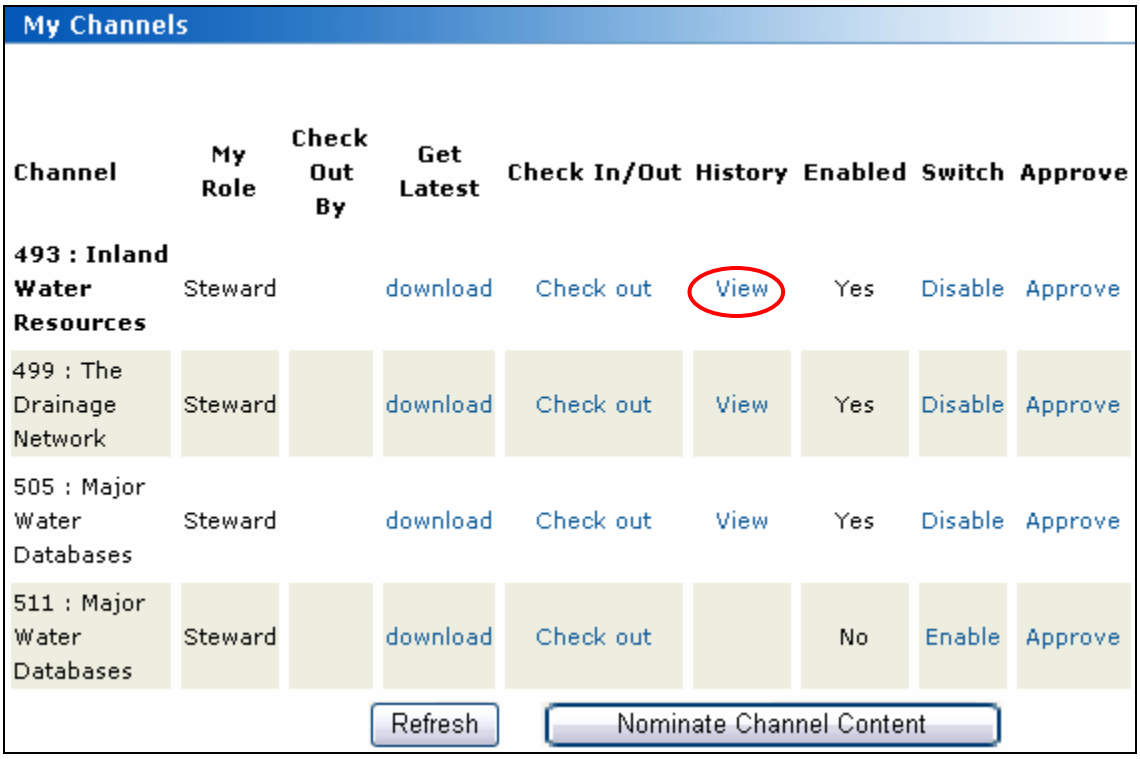
l. Check in the revised parent channel XML (Section 3.3). You may have to click the Refresh button at the bottom of the page to see the "Check In" link.

3.5. Update Channel Content on the Production Server

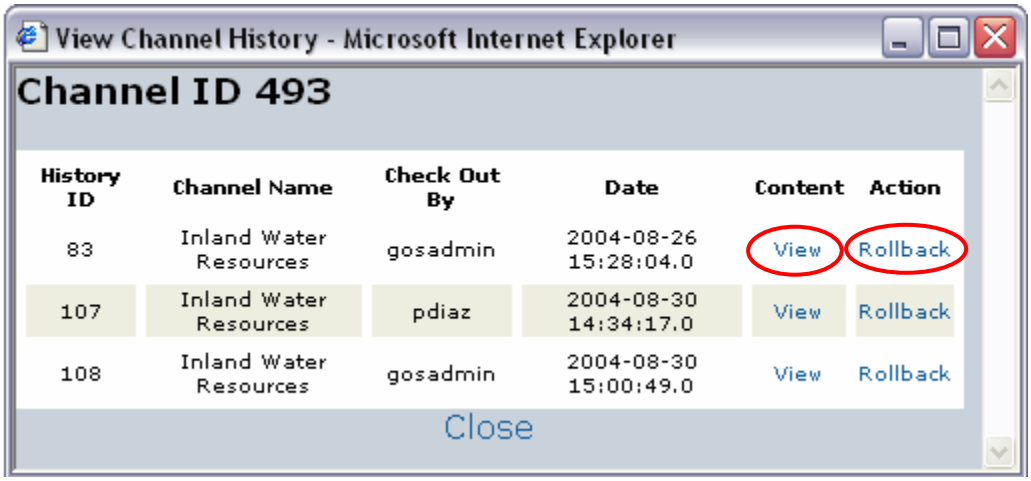
a. When you check in a channel, the changes won't be seen on the portal until the next day.
b. You can view your changes on the GOS staging testing server at http://gosstg.esri.com/gos. Changes to the channel will be updated automatically on GOS staging every four hours, starting at 8:00AM PT.

3.6. Reverting to Previously Saved Versions

a. Click on the My Channels link on the left menu bar.
b. Click the “View” link on the same row as the channel you want to revert.



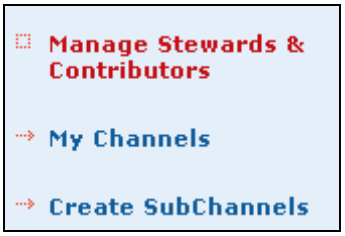
c. A list of the history of channel check-ins will be shown.



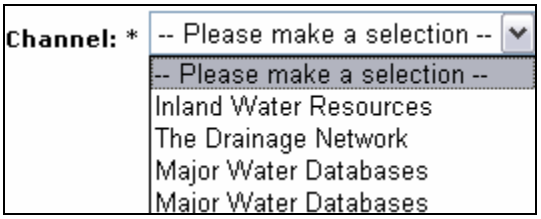
d. To view the XML of the channel that was checked in, click the “View” link. If you want to revert back to this version of the channel, click the “Rollback” link.

3.7. Assigning Stewards and Contributors

a. Click on the “Manage Stewards” link on the left menu bar.

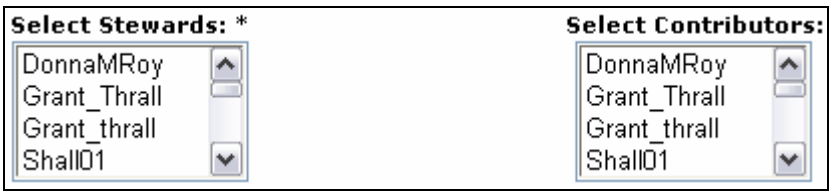


b. Click the drop-down box and select the channel or sub-channel you want to modify.



c. Clicking on the “Get Stewards/Contributors” button will show you a list of the current stewards and contributors to the channel. Do this to verify that the person you are adding is not already a steward or contributor.

d. The list of users on the left is for adding stewards and the one on the right is for adding contributors. Select usernames from the appropriate box. If you want to select more than one steward or contributor at a time, hold down the control key while clicking the usernames. You must select all current stewards and contributors of the channel, including yourself, in addition to the user you want to add.



Note: Only the GOS Administrator has the ability to assign users as stewards and contributors. If the user you wish to include is not on the appropriate list, you must contact the Administrator and request that they be made a steward or contributor.

Appendix A: Naming Conventions

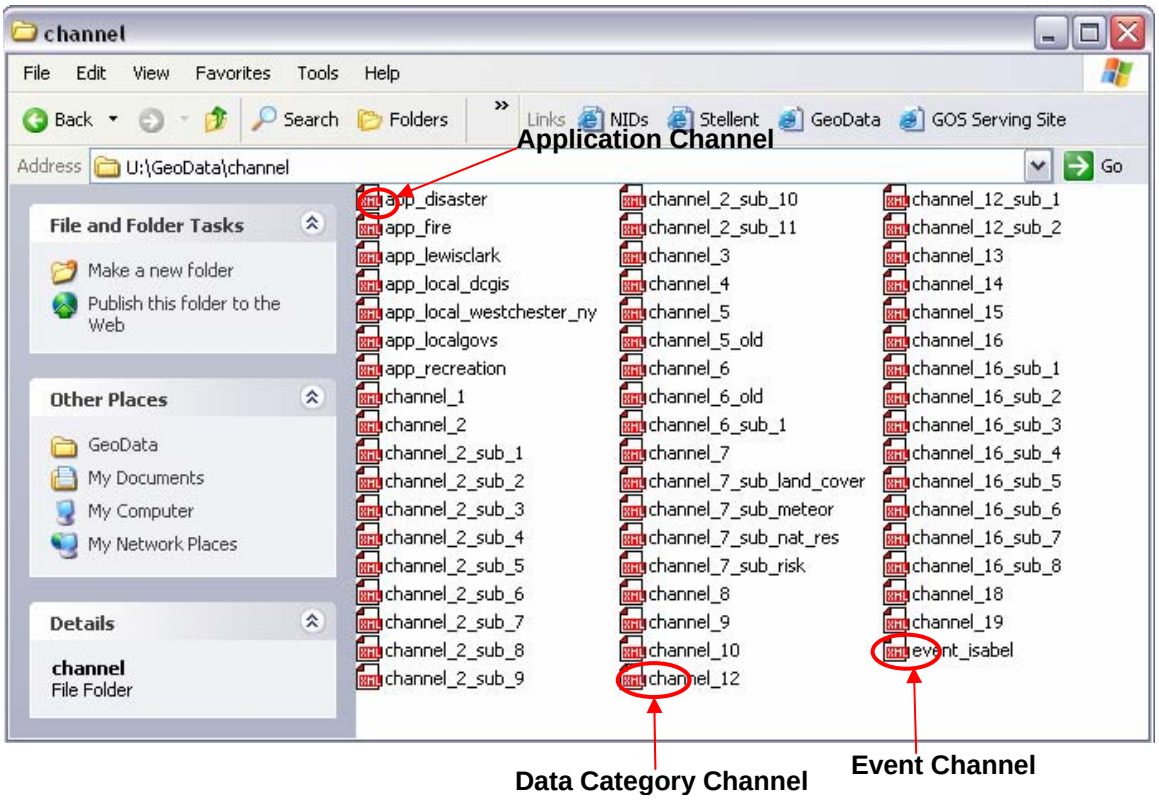
There are three different types of channels: Data Category, Event and Application.

The Data Category channels contain metadata records for specific data themes as defined by ISO 19115 Topic Categories . These pages are directly accessible from the home page in the predefined data categories. The file names for the Data Category pages and their sub-channels are preceded with the word “channel”.

The Event and Application topic pages emphasize data and related information for current events of interest or special application areas. Event channel files are denoted with a prefix of “event” and the file names for Application channels are preceded with “app”.

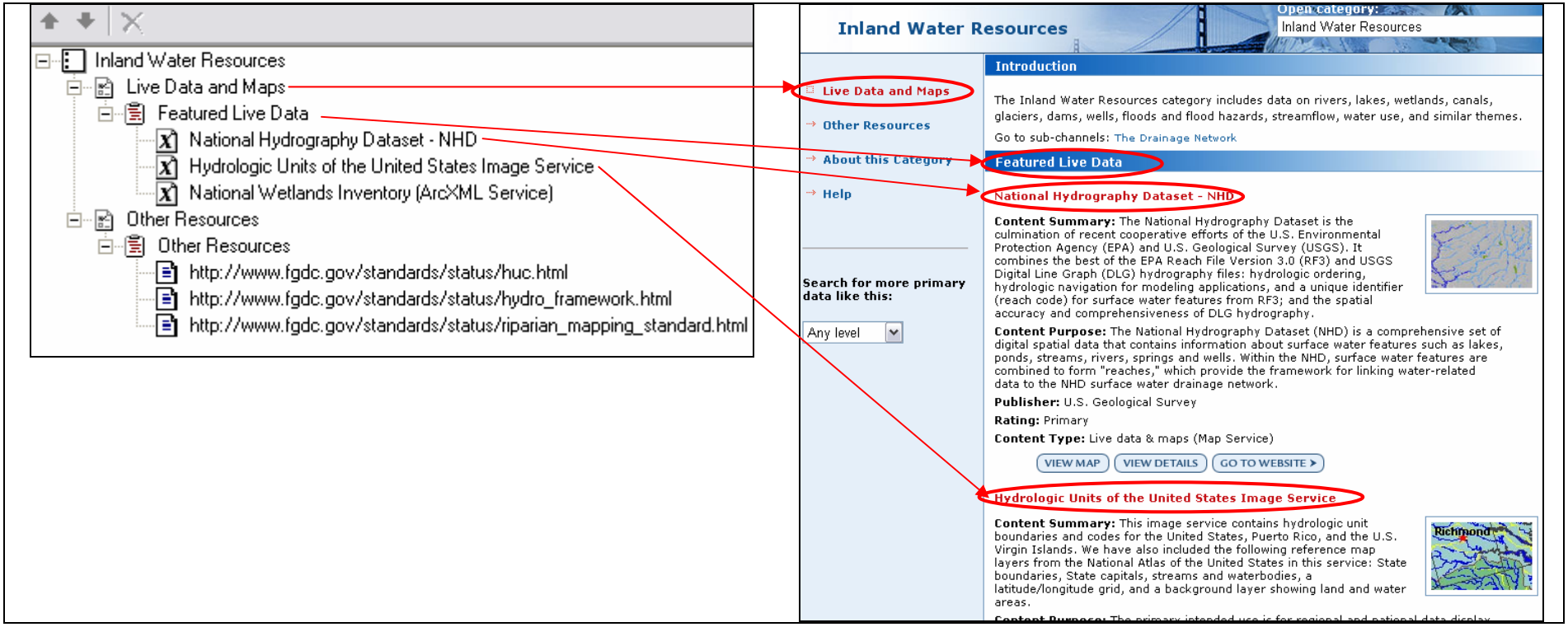
Remember that the GOS administrator has the ability to create channels, but stewards can only create sub-channels. When you create a sub-channel in the Channel Editor tool, it automatically assigns the new channel a name using the naming convention described above.

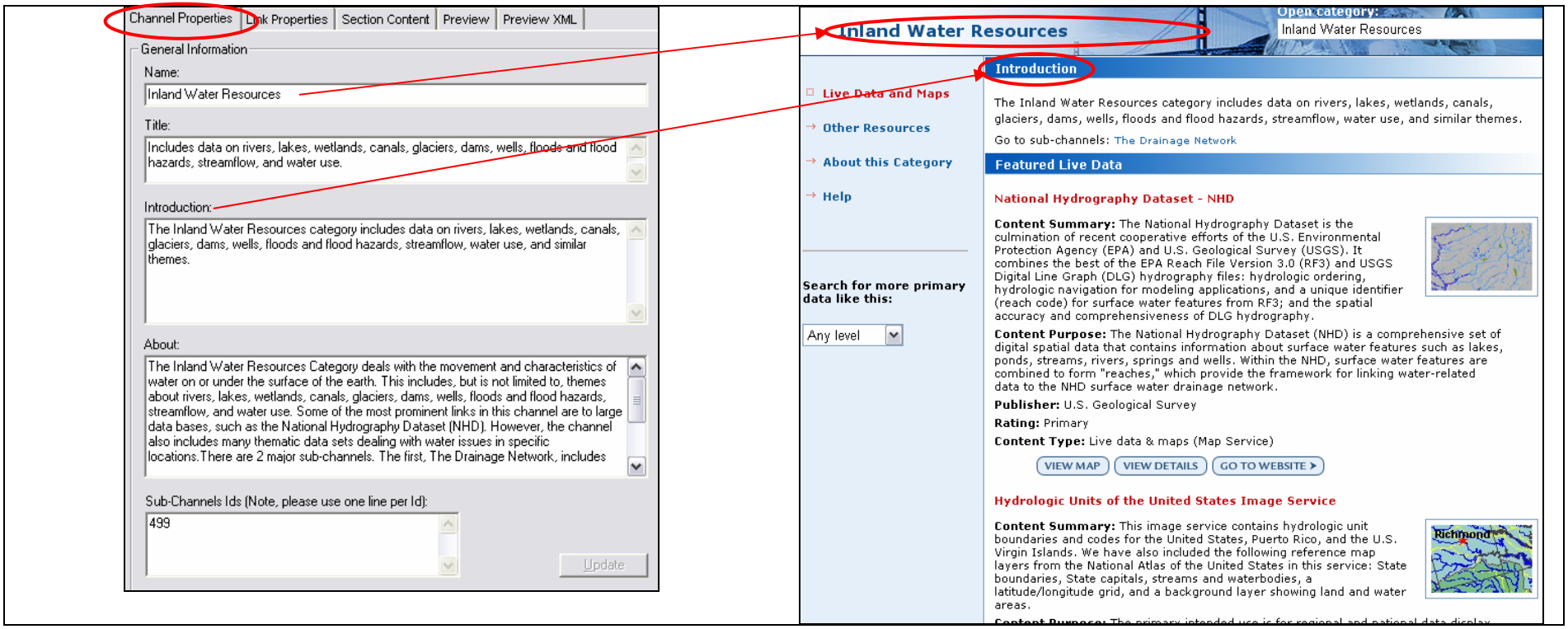
The following figure illustrates the file naming convention:

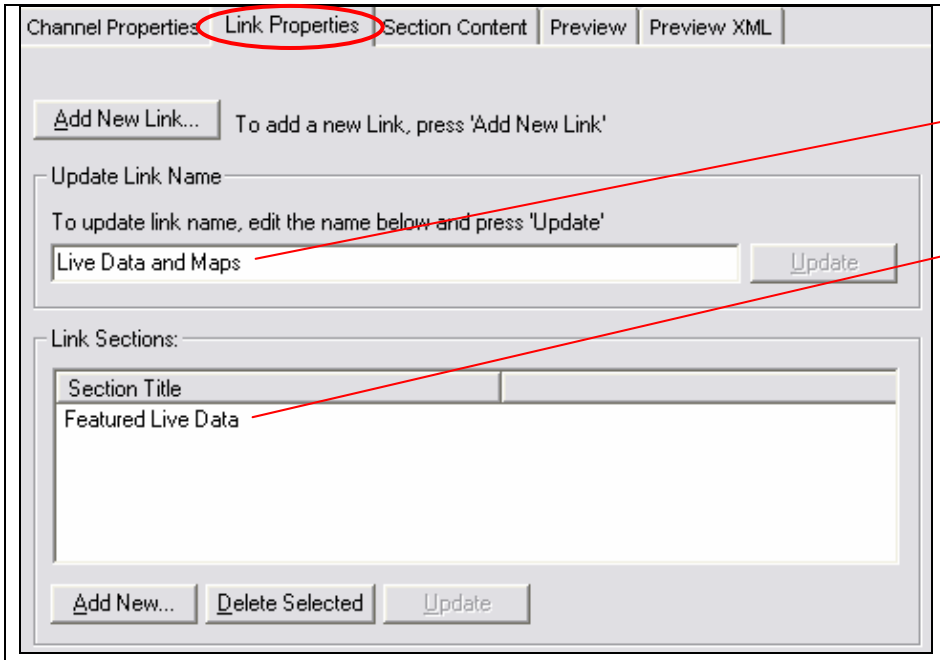


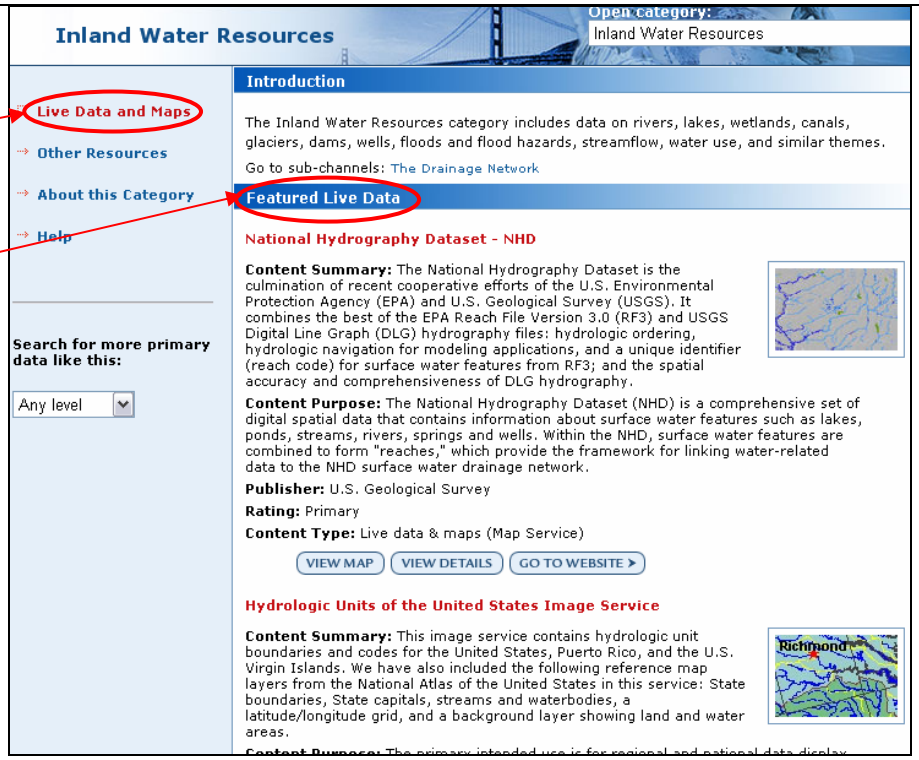
Appendix B: Relating the Tools to the Portal

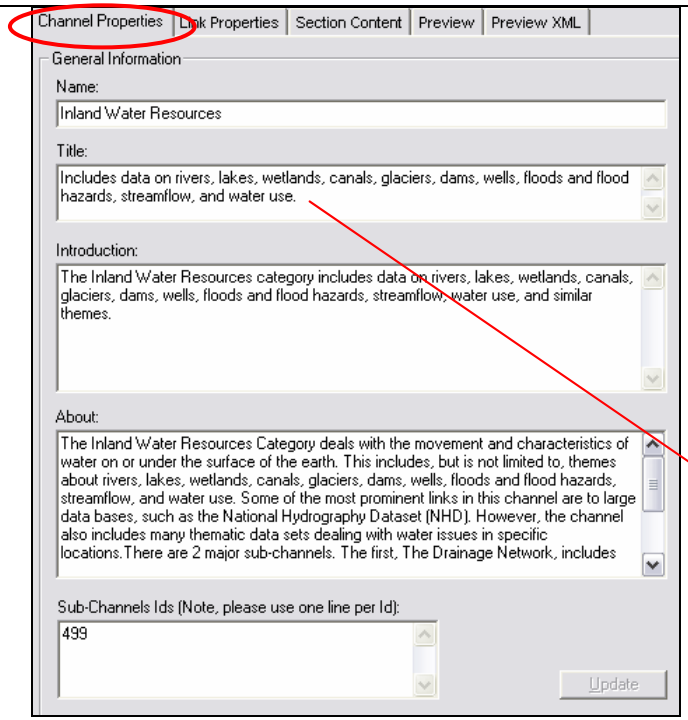
The following figure illustrates how the menu shown on the left side of the Channel XML Editor tool corresponds to how the channel is shown on the portal. Note that only a portion of the GOS portal screens are shown.



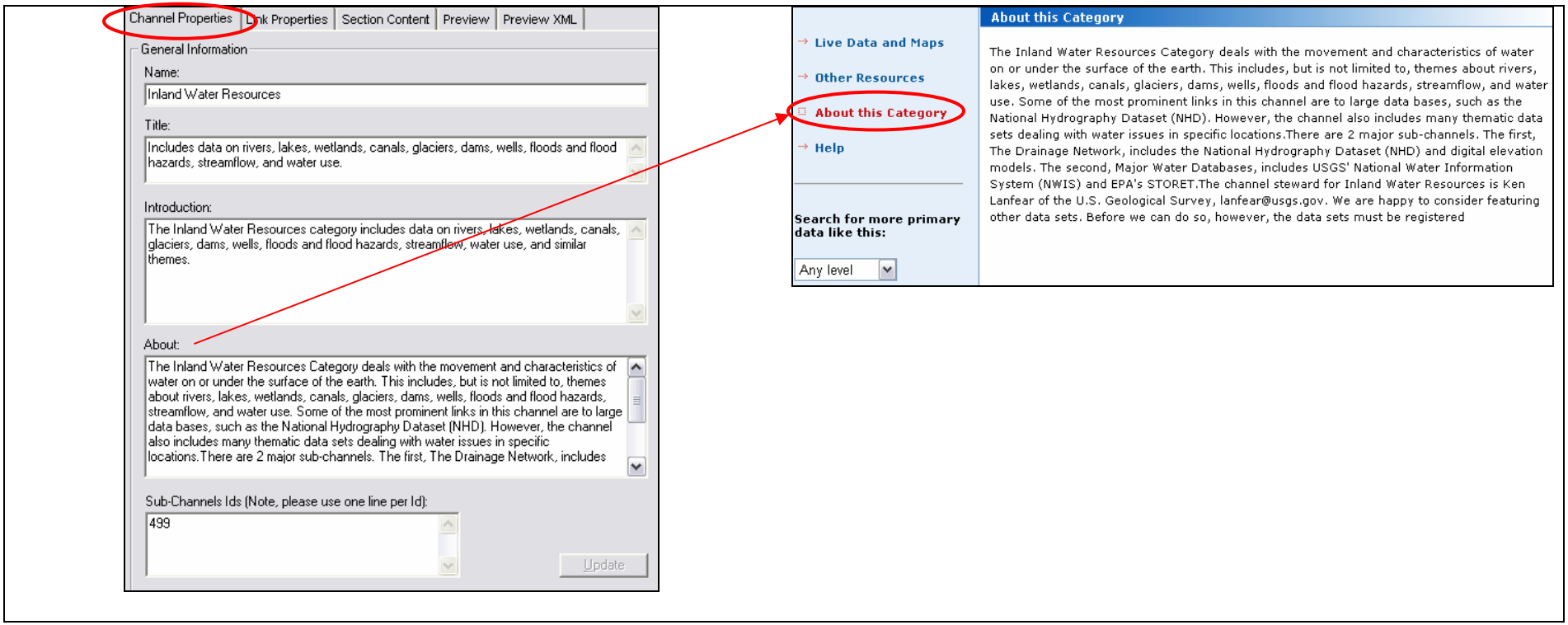

Channel Properties
Link Properties
Section Content
Preview
Preview XML
General Information
Name:
Inland Water Resources
Title:
Includes data on rivers, lakes, wetlands, canals, glaciers, dams, wells, floods and flood hazards, streamflow, and water use.
Introduction:
The Inland Water Resources category includes data on rivers, lakes, wetlands, canals, glaciers, dams, wells, floods and flood hazards, streamflow, water use, and similar themes.
About:
The Inland Water Resources Category deals with the movement and characteristics of water on or under the surface of the earth. This includes, but is not limited to, themes about rivers, lakes, wetlands, canals, glaciers, dams, wells, floods and flood hazards, streamflow, and water use. Some of the most prominent links in this channel are to large data bases, such as the National Hydrography Dataset (NHD). However, the channel also includes many thematic data sets dealing with water issues in specific locations.There are 2 major sub-channels. The first, The Drainage Network, includes
Sub-Channels Ids (Note, please use one line per Id):
499
Update
Inland Water Resources
Open category:
Inland Water Resources
Live Data and Maps
Other Resources
About this Category
Help
Search for more primary data like this:
Any level
Introduction
The Inland Water Resources category includes data on rivers, lakes, wetlands, canals, glaciers, dams, wells, floods and flood hazards, streamflow, water use, and similar themes.
Go to sub-channels: The Drainage Network
Featured Live Data
National Hydrography Dataset - NHD
Content Summary: The National Hydrography Dataset is the culmination of recent cooperative efforts of the U.S. Environmental Protection Agency (EPA) and U.S. Geological Survey (USGS). It combines the best of the EPA Reach File Version 3.0 (RF3) and USGS Digital Line Graph (DLG) hydrography files: hydrologic ordering, hydrologic navigation for modeling applications, and a unique identifier (reach code) for surface water features from RF3; and the spatial accuracy and comprehensiveness of DLG hydrography.
Content Purpose: The National Hydrography Dataset (NHD) is a comprehensive set of digital spatial data that contains information about surface water features such as lakes, ponds, streams, rivers, springs and wells. Within the NHD, surface water features are combined to form "reaches," which provide the framework for linking water-related data to the NHD surface water drainage network.
Publisher: U.S. Geological Survey
Rating: Primary
Content Type: Live data & maps (Map Service)
VIEW MAP
VIEW DETAILS
GO TO WEBSITE
Hydrologic Units of the United States Image Service
Content Summary: This image service contains hydrologic unit boundaries and codes for the United States, Puerto Rico, and the U.S. Virgin Islands. We have also included the following reference map layers from the National Atlas of the United States in this service: State boundaries, State capitals, streams and waterbodies, a latitude/longitude grid, and a background layer showing land and water areas.
Richmond


Channel Properties
Link Properties
Section Content
Preview
Preview XML
Add New Link...
To add a new Link, press 'Add New Link'
Update Link Name
To update link name, edit the name below and press 'Update'
Live Data and Maps
Update
Link Sections:
Section Title
Featured Live Data
Add New...
Delete Selected
Update


Inland Water Resources
Open category:
Inland Water Resources
Live Data and Maps
Other Resources
About this Category
Help
Search for more primary data like this:
Any level
Introduction
The Inland Water Resources category includes data on rivers, lakes, wetlands, canals, glaciers, dams, wells, floods and flood hazards, streamflow, water use, and similar themes.
Go to sub-channels: The Drainage Network
Featured Live Data
National Hydrography Dataset - NHD
Content Summary: The National Hydrography Dataset is the culmination of recent cooperative efforts of the U.S. Environmental Protection Agency (EPA) and U.S. Geological Survey (USGS). It combines the best of the EPA Reach File Version 3.0 (RF3) and USGS Digital Line Graph (DLG) hydrography files: hydrologic ordering, hydrologic navigation for modeling applications, and a unique identifier (reach code) for surface water features from RF3; and the spatial accuracy and comprehensiveness of DLG hydrography.
Content Purpose: The National Hydrography Dataset (NHD) is a comprehensive set of digital spatial data that contains information about surface water features such as lakes, ponds, streams, rivers, springs and wells. Within the NHD, surface water features are combined to form "reaches," which provide the framework for linking water-related data to the NHD surface water drainage network.
Publisher: U.S. Geological Survey
Rating: Primary
Content Type: Live data & maps (Map Service)
VIEW MAP
VIEW DETAILS
GO TO WEBSITE
Hydrologic Units of the United States Image Service
Content Summary: This image service contains hydrologic unit boundaries and codes for the United States, Puerto Rico, and the U.S. Virgin Islands. We have also included the following reference map layers from the National Atlas of the United States in this service: State boundaries, State capitals, streams and waterbodies, a latitude/longitude grid, and a background layer showing land and water areas.
Richmond


Channel Properties
Link Properties
Section Content
Preview
Preview XML
General Information
Name:
Inland Water Resources
Title:
Includes data on rivers, lakes, wetlands, canals, glaciers, dams, wells, floods and flood hazards, streamflow, and water use.
Introduction:
The Inland Water Resources category includes data on rivers, lakes, wetlands, canals, glaciers, dams, wells, floods and flood hazards, streamflow, water use, and similar themes.
About:
The Inland Water Resources Category deals with the movement and characteristics of water on or under the surface of the earth. This includes, but is not limited to, themes about rivers, lakes, wetlands, canals, glaciers, dams, wells, floods and flood hazards, streamflow, and water use. Some of the most prominent links in this channel are to large data bases, such as the National Hydrography Dataset (NHD). However, the channel also includes many thematic data sets dealing with water issues in specific locations.There are 2 major sub-channels. The first, The Drainage Network, includes
Sub-Channels Ids (Note, please use one line per Id):
499
Update

Data Categories
Administrative and Political Boundaries
Agriculture and Farming
Atmosphere and Climatic
+ Biology and Ecology
Business and Economic
Cadastral
+ Cultural, Society, and Demographic
+ Elevation and Derived Products
+ Environment and Conservation
Geological and Geophysical
Human Health and Disease
+ Imagery and Base Maps
Major Water Databases
+ Inland Water Resources
Locations
Oceans a
Includes data on rivers, lakes, wetlands, canals, glaciers, dams, wells, floods and flood hazards, streamflow, and water use.
Transportation Networks
Utilities and Communication


Channel Properties
Link Properties
Section Content
Preview
Preview XML
General Information
Name:
Inland Water Resources
Title:
Includes data on rivers, lakes, wetlands, canals, glaciers, dams, wells, floods and flood hazards, streamflow, and water use.
Introduction:
The Inland Water Resources category includes data on rivers, lakes, wetlands, canals, glaciers, dams, wells, floods and flood hazards, streamflow, water use, and similar themes.
About:
The Inland Water Resources Category deals with the movement and characteristics of water on or under the surface of the earth. This includes, but is not limited to, themes about rivers, lakes, wetlands, canals, glaciers, dams, wells, floods and flood hazards, streamflow, and water use. Some of the most prominent links in this channel are to large data bases, such as the National Hydrography Dataset (NHD). However, the channel also includes many thematic data sets dealing with water issues in specific locations.There are 2 major sub-channels. The first, The Drainage Network, includes
Sub-Channels Ids (Note, please use one line per Id):
499
Update
Live Data and Maps
Other Resources
About this Category
Help
Search for more primary data like this:
Any level
About this Category
The Inland Water Resources Category deals with the movement and characteristics of water on or under the surface of the earth. This includes, but is not limited to, themes about rivers, lakes, wetlands, canals, glaciers, dams, wells, floods and flood hazards, streamflow, and water use. Some of the most prominent links in this channel are to large data bases, such as the National Hydrography Dataset (NHD). However, the channel also includes many thematic data sets dealing with water issues in specific locations.There are 2 major sub-channels. The first, The Drainage Network, includes the National Hydrography Dataset (NHD) and digital elevation models. The second, Major Water Databases, includes USGS' National Water Information System (NWIS) and EPA's STORET.The channel steward for Inland Water Resources is Ken Lanfear of the U.S. Geological Survey, lanfear@usgs.gov. We are happy to consider featuring other data sets. Before we can do so, however, the data sets must be registered

Appendix C – Glossary of Terms

Category – A featured subset of GOS data resources that have been identified as having sufficient merit to be featured for "two clicks to content" accessibility. Data Categories have been created on the GOS Portal for each of the ISO Topic Categories as identified in *International Organizations for Standards Metadata Standard* (ISO 19115). (See http://fgdc.gov/metadata/whatsnew/fgdciso.html)

Channel – A section of the geodata.gov website dedicated to a specific 'Data Category' or Category crosscutting event/topic such as homeland security, Hurricane Isabel, California Wildfires, National Map, Lewis & Clark, etc.

Channel Contributor – Individuals who have been assigned "contributor" authority to a specific channel. Channel Contributors must log onto the GOS Portal using authenticated user ID and password to see and use the Contributor tools. The Channel Contributor may mark an existing GOS data resource for consideration by the Channel Steward for featuring in the channel to which he/she is assigned Contributor authority. The Contributor may also be asked to respond to a roll call vote sent by the Channel Steward on nominated data resources for inclusion in the Channel.

Channel Contributor Tools – The Channel Contributor will see a "Nominate" button associated with each metadata record when he/she is logged in and authenticated on the GOS portal. Use this button to notify the appropriate Channel Steward of a candidate data resource for consideration for inclusion in one of the channels.

Channel Steward – An individual designated by the Geospatial One-Stop Executive Director or his Deputy. The Steward has access to the Channel Administration Tools which enable him/her to manage the content of the Channel to which he/she is designated. The operational assignment of access to the Channel Administration Tools is done by the GOS System Administrator.

Channel Administration Tools – The content management toolset available to the designated Channels or Sub-channels Stewards of the GOS Portal. These tools are accessible only after the Steward has successfully logged onto the Portal and been authenticated by user ID and password. A Channel Steward can use the Administration Tools to modify only the channel for which he/she has been designated the Steward.

Featured Resource – A data or information resource that is considered to be of significant interest, quality or the quintessential source for that data

type. The resource may be featured as a data source of interest for only a period of time within the channel due to current events or the fact that the resource is new or particularly noteworthy. These data resources may be rotated periodically as determined by the Channel Steward.

geodata.gov – The internet portal implementation of Geospatial One-Stop that enables the sharing of existing data, and allows agencies to identify potential partners for sharing the cost for future data purchases. (see *Portal*)

Geospatial One-Stop – An eGov initiative that provides federal and state agencies with a single point of access to geospatial data resources.

GOS – (see *Geospatial One-Stop*)

GOS Administration – Those individuals tasked with making policy and operational decisions related to the Geospatial One-Stop Portal. Among these individuals are the GOS Executive Director and his Deputy who have the authority to designate Channel Stewards.

Metadata – Fielded descriptors that provide information about data resources. These records of information are formatted in accordance with the FGDC Content Standard for Digital Geospatial Metadata (CSDGM) and stored in the GOS database, but are "owned" by the data resource provider. The authoritative copy of a data resource's metadata resides with the owner on an NSDI node, or other online location from which GOS "harvests" a copy to facilitate discovery by Portal users. For information about tools to create metadata, or the standards that specify metadata content, see: http://www.fgdc.gov/metadata/metadata.html.

Navigation Links – The predetermined links found at the top left of each Channel page. These include mandatory links that the Channel Steward must provide at least one item to link to, and optional links that will appear on the public Channel page only if the Steward has assigned at least one item to it.

Portal – The web-based user interface for Geospatial One-Stop. This Portal is available to the public via the URL http://www.geodata.gov.

Sub-Channel – A subdivision of a channel that further breaks down the data resources featured in a Channel into related groups.

Sub-Channel Steward – An individual assigned by the Channel Steward to manage a portion of the Channel (See Sub-Channel). The Sub-Channel Steward has access to the same Channel Administration tools as does the Channel Manager, but only has access to those elements

contained within the Sub-Channel for which he/she is responsible. Sub-Channel privileges are assigned and managed through user ID and login to the GOS Portal.

System Administrator – The individual who manages the Portal application, including the assignment of Channel Steward privileges per direction from the Geospatial One-Stop Executive Director or his Deputy. Note that the GOS System Administrator does not have computer operating system access, but is the manager of the Portal application, rather than the operating system or server upon which the application resides.

"Two clicks to content" – A stated objective of the GOS Portal intending to provide quick and easy access to data resources which have particular merit or widespread interest to the user community. Data resources featured in Data Categories or on the Portal as Applications or Events represent a subset selected by Channel Stewards from the entire collection of metadata held within the GOS database.