EPA and Partners Metadata Training Project
Training Session Information

The EPA and Partners Geospatial Metadata Project will provide comprehensive metadata training and instruction for EPA's geospatial community (personnel, contractors, and grantees), other (non-EPA) federal agencies, state agencies, tribes, and additional groups (e.g., organizations, academia, local government agencies, and/or private companies). Any interested party is invited to join.

This document provides an overview of how to access the EPA and Partners Metadata Training Sessions as well as the content planned for each session. If you have any questions, please contact Jessica Zichichi (jzichichi@innovateteam.com) or Caroline Roberts (croberts@innovateteam.com). There will be 3 courses (introductory, intermediate, and EME 3.0 specifically), each of which will have 2 offerings.

The sessions are currently scheduled for the following dates and times:

Web-based sessions (1-3 PM EDT):
- August 19, 2008 - Introductory (1st offering)
- August 26, 2008 - Intermediate (1st offering)
- September 09, 2008 - Introductory (2nd offering)
- September 16, 2008 - Intermediate (2nd offering)
- October 7, 2008 - Using the new EME (1st offering)
- October 14, 2008 - Using the new EME (2nd offering)

On-site Session (EPA Headquarters in Washington DC)
- October 21, 2008 (9:30 – 12:00) - Introductory/New EME
- October 21, 2008 (1:00 – 3:30) - Intermediate/New EME

The onsite session will be a **repeat** of the information contained in the web-based sessions.

Accessing the Sessions:
All trainings **except** the hands-on training session in DC will be conducted using web-cast and teleconference. No special tools or software are required except a web browser and a high-speed internet connection. We will be using EPA's Oracle Portal for the web conference. The web conference feature does require that users install the Oracle Meeting Manager in advance. This can be done at the time of access. It is recommended that you access the web conference information 10 minutes prior to the start of the meeting so that you have time to enter your information and configure the meeting manager on your machine (if necessary). You may pre-enroll, but you will likely still have to re-enroll when you actually access the conference.

Web Conference and Teleconference Information:
- o Web Conference URL: http://portal.epa.gov/webconference
- o Conference Key: 2774
- o Teleconference Phone Number 1-712-432-7308
- o Participant Code: 92696#

To access the web conference, please go to http://portal.epa.gov/webconference. The sessions are all listed in the public pages. They are called

- o EPA and Partners Geospatial Metadata Training: Introduction
- o EPA and Partners Geospatial Metadata Training: Intermediate
- o EPA and Partners Geospatial Metadata Training: Introduction (2nd offering)
- o EPA and Partners Geospatial Metadata Training: Intermediate (2nd offering)
- o EPA and Partners Geospatial Metadata Training: EME 3.0
- o EPA and Partners Geospatial Metadata Training: EME 3.0

Click on the name of the session you would like to attend (e.g., "EPA and Partners Geospatial Metadata Training: Intermediate"). If you do not see the name of the conference you are looking for, you may need to scroll to the next set of scheduled conferences. You can do this by clicking the right arrow at the top of the conference list. You will need to enroll for this conference. When you click on the conference name, you will be required to enter your First Name, Last Name, Email Address, Company Name, Postal Address, and Telephone Number. Once enrolled, you will be asked for the conference key. The key for all EPA and Partners Metadata training conferences is 2774. Enter 2774 into the text box, and then click 'Join Conference'.

Materials
All materials for the trainings will be posted to the Innovate website by **August 14, 2008**. The URL for the website is http://innovateteam.com/projects/epa-and-partners-geospatial-metadata-training/

In summary:
- o **Web Conference**
    - o URL: http://portal.epa.gov/webconference
    - o Conference Key: 2774
- o **Teleconference**
    - o Phone Number 1-712-432-7308
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- o **Materials**
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Session Content:
The training series will be conducted in three different sessions; an introductory session, an intermediate session, and a session that will focus specifically on the EPA Metadata Editor (EME) version 3. Each session will be broken down into modules. Most modules will have some hands-on demonstrations and samples where the user can follow along. All materials will be placed on the Innovate website (http://innovateteam.com/projects/epa-and-partners-geospatial-metadata-training/) prior to the training so that attendees can download the information if they would like. There is no need to download the information in advance; everything will be presented in the web-cast. However, if users would like to follow along on their own machines, they will be able to using the samples provided. More detail about each session is provided below.

Introductory Training: the introductory training will provide attendees with an introduction to the FGDC standard and FGDC compliancy as well as how to use various tools (e.g., a metadata implementation, templates, and editors [specifically the use of the EPA Metadata Editor]) to improve metadata production. This session will also introduce the North American Profile (NAP) of the ISO 19115/19139 standard and will discuss how it relates to the FGDC CSDGM. This session is designed for users who do not have a lot of knowledge about the FGDC standard and its structure or about creating an implementation, using templates or using the EME. It is also intended for users who would like to know more about the NAP of the ISO 19139/19115. It does not cover why someone should develop metadata or what the business case for metadata is; it is assumed that most users already know they want to create metadata and need more information on that process.

There are four (4) modules for this training, including:

1. **Overview of the FGDC CSDGM**
    - o What is the FGDC CSDGM?
    - o How is it structured?
    - o What do the sections contain?
    - o Best practices for some key elements
    - o Additional FGDC CSDGM resources

2. **FGDC Compliancy**
    - o What is compliancy?
    - o Why is it important?
    - o What are the mandatory sections & elements
    - o How do I test compliancy?
    - o What are the common errors and their causes
    - o How do I fix and/or avoid errors
    - o Additional compliancy resources

3. **Metadata Development Solutions**
    - o Developing a 'metadata implementation'
    - o Creating and using templates
    - o Introduction to using the EME
    - o Additional tools and templates solutions

4. NAP of ISO 19139/19115
- o Introduction to the NAP and ISO19115/19139
- o Relationship to the FGDC CSDGM
- o NAP/ISO Structure
- o NAP/ISO Core Elements
- o What's next with the NAP
- o Available NAP metadata editors
- o NAP resources

Intermediate Training: the intermediate training will provide attendees with a quick overview of the basics learned in the intro course (FGDC CSDGM, compliancy, creating an implementation and using templates) and will then focus on advanced use of the EPA Metadata Editor (EME), sharing information via metadata catalogs, and how to contribute to Geospatial One Stop. The advanced use of the EME will include a demonstration of how to modify the database for specific user needs. This demonstration will show the State of North Carolina's implementation. It will also provide a detailed overview of how EPA set up their geospatial data portal, called the GeoData Gateway (GDG) to serve internal and external sharing needs. It will describe the configuration and the challenges faced in implementing an enterprise catalog as an example of how to implement a Portal Toolkit catalog and will feature a live demonstration of the site and its components. Other catalog implementations will be described and compared against the use of ESRI's Portal Toolkit software. This training session assumes that attendees have a decent understanding of the FGDC CSDGM and how to create metadata.

There are three (3) modules for this training, including:

1. Brief Re-cap of introductory topics
- o Overview of the FGDC CSDGM
- o FGDC Compliancy and typical errors
- o The North American Profile (NAP) of the FGDC CSDGM
- o Additional FGDC CSDGM resources

2. Using the EME
- o Overview of using the EME
- o Customizing it for your needs
    - North Carolina DENR metadata implementation (in progress)
    - Walk through of North Carolina DENR metadata customization

3. Metadata Catalogs and Sharing
- o Overview of catalog implementation options
- o Implementation considerations
- o Catalog characteristics
- o EPA Implementation Example
- o Overview of using and registering for Geospatial One Stop (GOS)

EPA Metadata Editor (EME) 3.0 Training: the EME 3.0 training will focus on how to use version 3 of the EPA Metadata Editor. It will provide an overview of the new features and how they work. Specifically, this training session will cover the following new EME features:

- Using the new EPA Synchronizer to customize your metadata synchronization
- Using the new EPA Metadata Validation options
    - o batch validation
    - o highlighting errors within the user interface
    - o separating errors from warnings
- Configuring the path to the EME database
- Using the new help features
- Adding multiple process steps
- Changing compound element behavior
- Entering user-defined keywords
- Editing attributes
- Entering multiple dates in the time period information field
- Removing ESRI tags
- Using global search and replace