
Appendix P – Records Management Metadata Entry

Records Management is responsible for creating metadata in EDMS that makes sense and provides useful search words for ER Search and public web page searchers.

The metadata should not contain notes, undocumented abbreviations, punctuation and document numbers for other materials in NIRIS.

It is Records Management's job to clean up and clarify document information and to create information and words, using EDMS, that users understand and can search.

If users cannot find what they are looking for, then Records Management has failed to do its job in EDMS. NIRIS EDMS metadata fields are designed to fully describe documents added to NIRIS. Metadata created by Records Management must make user searches easy.

The metadata in EDMS is used by the ER Search, the LUC Tracker and the NAVFAC and BRAC installation public web pages. Metadata created or selected in EDMS is visible and searchable on each one of these sites.

Metadata creation must be standardized NAVFAC wide. When NIRIS users and the public search different installations, they expect and are entitled to see similar search results. It is Records Managements responsibility to ensure that, no matter which installation is searched, search results are similar.

Most EDMS metadata fields have pull down menus. Pull down menus were created in order to standardize data entry across NAVFAC.

Some metadata fields are open text fields. The most important open text field is the title because this is the field most users use to search for document or documents they need.

An important open text field is the keywords field. The keywords field can be used to add important searchable words which cannot be added in the title field.

When an ER Search is done in the title field, both the title and keywords fields are searched

Creating descriptive, searchable and accurate metadata in the open text EMDS fields enables users who use the ER Search, the LUC Tracker and the NAVFAC and BRAC installation public web pages to search and find documents they need.

Below is guidance on how to fill in the open text fields used to create the best possible product for the ER Search, the LUC Tracker, and the NAVFAC and BRAC public web pages.

Title Metadata Field

More Useful Words

“More Useful Words” means that the more relevant, document specific and useful words used in the title field, the more chances users have of finding what they are looking for

- The title field is the most important field for users. It is usually the first field they use to input words or phrases. The information and words Records Managers add in this field is critical.
- The open EDMS text field allows for a lot of descriptive information about the document
- The more relevant, document specific and useful words you use, the more words are available to people who use the ER Search and the public web page searches

How to Create a Title

Title Creation Variations

- Use the actual document title if it is comprehensive, makes sense and has many searchable words and/or phrases
- Create a title using a variation on the title word sequence without losing important information about the document

- If the document does not have a title, create one based on the information within the document
 - Review the document table of contents and the executive summary to find words to use in the title field and the keywords field
 - Read correspondence and other short documents to find words to use in the title field and the keywords field
- If you are unsure of how to create a title, use the ER Search to find similar documents
 - Review how the document titles were written so you can get an idea of how to create a title
 - Do not limit searching to your Command; research other Command records
- You are responsible for creating document titles which are useful to users when they search for information or documents

Metadata Rules for the EDMS Title Metadata Field

- **Use the Standard Installation Name and Standard State Abbreviation in the Title**
 - Add the standardized installation name and state abbreviation at the end of all titles
 - State Examples:
 - CA
 - VA
 - FL
 - TX
 - WA
 - HI
- **Use the Word, Final, in the Title**

- Include the word final in the title field of correspondence, reports or other documents related to final versions of documents
- If a draft or draft final version of a document must be added to NIRIS, use the word, draft or draft final in the title
 - Add draft and draft final versions ONLY if no final version can be located
 - Add draft and draft final versions if requested to do so by a Navy Project Manager. A written reason to make add these types of document should accompany the request.
- **Site Name(s) or Nicknames**
 - Research the table of contents and the executive summary to determine if the site(s) has other names or nicknames
 - Add site names or nicknames in the title or keywords field as appropriate
 - Examples:
 - Operable Unit 1 (OU 1) the Tank Field
 - Area of Concern 3 (AOC 3) the Coastal Landfill
 - Site 36 the Childcare Center
 - Underground Storage Tank 1433 (Building 1433) the Photographic Laboratory
 - Solid Waste Management Unit 12 (SWMU 12) the North Landing
- **Use the Notation: ‘Draft Acting As Final’ in the title**
 - Include this notation when no final version can be found
 - Place, in parenthesis, after the installation name and state abbreviation at the end of the title
- Do not add or use ‘leading zeros’ when adding site, OU, SWMU, AOC, UST, AST or building numbers in the title field

Title Punctuation

- Unless it is absolutely necessary for clarification, do not use any type of punctuation within the title
- This prohibition includes:
 - commas
 - semi-colons
 - colons
 - underscore
 - dashes
 - periods
 - question marks
 - ampersand
 - quotations marks (use for magazine or newspaper article titles)
 - any other punctuation

NOTE: Parenthesis can be used for certain information

- If a document title has punctuation, ignore it unless it is absolutely necessary for clarification
- Punctuation within the title field makes searching very difficult, if not impossible, when using the ER Search and the NAVFAC or BRAC public web page search

Approved Use of Commas

Creating a title for raw analytical and unverified laboratory data, verified analytical data and validated and validation laboratory reports. Raw analytical and unverified laboratory data, verified analytical data and validated and validation laboratory reports should be added to NIRIS as standalone documents, separately from the report(s) it supports.

Commas should be used when creating a title for these types of analytical data and reports because the Sample Data Group Number (SDG) must have a comma before and after the number. Ensure that the commas are properly placed; see Chesapeake_NSGA 000035 (below) for an “incorrect” comma placement.

- Title for analytical and unverified laboratory data

Format Example: *Laboratory Data Package, SDG#, Standard Installation Name and Standard State Abbreviation*

- Title for verified analytical data/validated and validation laboratory reports

Format Example: Validated Data Package, SDG#, Standard Installation Name and Standard State Abbreviation

Examples from NIRIS

CHESAPEAKE_NSGA	000037	03/18/2019	LABORATORY DATA PACKAGE, 19-0193, NSGA NORTHWEST CHESAPEAKE VA
CHESAPEAKE_NSGA	000035	03/14/2019	LABORATORY DATA PACKAGE,19-0180, NSGA NORTHWEST CHESAPEAKE VA
EARLE_NWS	001931	06/01/2016	VALIDATED DATA PACKAGE, 320-18555-1, NWS EARLE NJ
EARLE_NWS	001926	05/01/2016	VALIDATED DATA PACKAGE, 320-17947-1, NWS EARLE NJ
EARLE_NWS	001929	03/01/2016	VALIDATED DATA PACKAGE, 320-17363-1, 320-17376-1, 320-17406-1, 320-17463-1 NWS EARLE NJ
DAM_NECK_FCTC	000203	01/31/2018	VALIDATED DATA SUMMARY REPORT, TK1290, DAM NECK ANNEX OCEANA VA
OCEANA_NAS	001354	12/18/2017	VALIDATED DATA SUMMARY REPORT, 1709111, NAS OCEANA VA

Do not use the abbreviation, SDG, in the document title

CAMP_LEJEUNE_MCB	006241	12/20/2012	DATA VALIDATION PACKAGE, 1212186, MCB CAMP LEJEUNE NC
CAMP_LEJEUNE_MCB	005600	12/19/2012	DATA VALIDATION PACKAGE, SDG A207217-WE12, MCB CAMP LEJEUNE NC

Abbreviations

- Write out the words of the abbreviation, then add the abbreviation for the words in parenthesis. It is permissible to use parenthesis to enclose the abbreviations
 - **Do not use abbreviations in titles without writing out the words the abbreviation stands for**
 - **Do not write out the words of an abbreviation without adding the abbreviation in parenthesis after the words**

Examples:

- Operable Unit 10 (OU 10)
- Hadnot Point Industrial Area (HPIA)
- Operable Unit (OU 5)
- Areas of Concern (AOC B)
- Underground Storage Tank (UST 3008)
- Building numbers (Building 8)
- Unexploded Ordnance (UXO 30)

- Writing out the words and using abbreviations in the title field enhances searching, making it more comprehensive and useful
- Use appropriate standard abbreviation for the words in titles
- If a title has words describing a site but does not display or have the standard abbreviation, in the title, add it in parenthesis
- Research unknown abbreviations to find out what it stands for and write out the words in the title field
 - No matter how many words are in the abbreviation, write it out

Title Spacing

- Use parenthesis to enclose abbreviations like OU, AOC, SWMU, UST, AST, UXO, etc.
- Use standardized spacing within parenthesis

There are many variations on how to write words and numbers. Standardized spacing within words and numbers enables searching

- **Examples How to Space Within Parenthesis:**
 - (SITE 22)
 - (OU 5)
 - (AOC 10)
 - (UST 8)
 - (SWMU 1)
 - (PSC 45)
 - (UXO 3)
- **Do Not Use Non-Standard Words and Spacing**
 - Site22
 - Site twentytwo
 - Site twenty-two
 - Site twenty two
 - Site twenty_two

Abbreviation Definition

An **abbreviation** is a shortened or contracted form of a word or phrase, used to represent the whole word or phrase

- **Examples:**
 - Operable Unit 6 (OU 6)
 - Underground Storage Tank 8 (UST 8)
 - Solid Waste Management Unit 3 (SWMU 3)
 - OU
 - NAVFAC
 - NATO
 - radar

Transmittal Letters

- If possible, always separate transmittal letters from the document it transmitted
- Add transmittal letters separately in NIRIS
- **Use the same words and phrases in the title field used to describe the document the letter is associated with. Documents with the same words will appear together in an ER search or public web page search**
 - Example:
 - TRANSMITTAL LETTER FOR THE FINAL REMEDIAL INVESTIGATION REPORT FOR OPERABLE UNIT 6 (OU 6) SITE 36 VOLUMES I, II, AND III MCB CAMP LEJEUNE NC
 - FINAL REMEDIAL INVESTIGATION REPORT FOR OPERABLE UNIT 6 (OU 6) SITE 36 VOLUME I OF III TEXT AND FIGURES MCB CAMP LEJEUNE NC

Multiple Volumes

- Do not “split” the volumes and add them as a single entry in NIRIS
- Add multiple volumes as separate entries in EDMS
- Add the volume number and the total number of volumes for the set even if the information is not written in the title
- Decide on a volume wording and format; Use it consistently
- Examples: VOLUME I OF II, VOLUME 1 OF 4, VOLUME TWO OF SIX; **Note:** the preferred number format is Arabic (1, 2, 3, 4, etc.)
- If the volumes use Roman numerals in the title, rather than Arabic numerals, use the Roman numerals. Do not change them to Arabic
- Add volume information after the title and before the standardized installation name and state abbreviation
- If a single volume is over 200MB, break the volume into 200MB or less pieces and add them to NIRIS as separate documents. Standardize by using the same words and phrases in the title field to describe the document. Add associated raw and unverified laboratory or analytical data as separate, standalone document in NIRIS.
 - FINAL REMEDIAL INVESTIGATION REPORT FOR OPERABLE UNIT 6 (OU 6) SITE 36 VOLUME II OF III APPENDICES A - C MCB CAMP LEJEUNE NC
 - FINAL REMEDIAL INVESTIGATION REPORT FOR OPERABLE UNIT 6 (OU 6) SITE 36 VOLUME II OF III APPENDICES D - K MCB CAMP LEJEUNE NC
- Standardize by using the same words and phrases in the title field to describe the document. Documents with the same words will appear together in an ER search or public web page search
- **Example:**

- FINAL REMEDIAL INVESTIGATION REPORT FOR OPERABLE UNIT 6 (OU 6) SITE 36 VOLUME I OF III TEXT AND FIGURES MCB CAMP LEJEUNE NC
- FINAL REMEDIAL INVESTIGATION REPORT FOR OPERABLE UNIT 6 (OU 6) SITE 36 VOLUME II OF III APPENDICES A - K MCB CAMP LEJEUNE NC
- FINAL REMEDIAL INVESTIGATION REPORT FOR OPERABLE UNIT 6 (OU 6) SITE 36 VOLUME III OF III APPENDICES L - AA MCB CAMP LEJEUNE NC

Missing Volume(s) in a Multi-Volume Set

When a multi-volume set is missing a volume or volumes, do the following:

- 1) Contact the contractor who issued the document to obtain a copy of the missing volume(s)
- 2) Check with the RPM to see if they can provide a copy of the missing volume(s)
- 3) Search NIRIS to see if the missing volume(s) was added separately from the other volumes in the set. Historically, many volumes were added using different wording in the title so that they do not appear with other volumes in the set when a title search is done.
 - Title Search
 - Date Search
 - Site Search
 - Author Affiliation
 - Author (for correspondence)

If the missing volume cannot be located or obtained from the contractor or RPM, follow these steps

- 1) Add a note in the EDMS Comments field that a volume is missing.
- 2) Add the information, in parenthesis, at the end of the Volume 1 title and after the state abbreviation in the title metadata field

- 3) Use parenthesis to add the standardized wording, VOLUME _ OF _ NOT RECEIVED, to advise that a volume is missing; the information will print as part of the title field on the EDMS cover page

Example: Volume 5 of 5 Not Received

Purpose of adding missing volume information in the title field

- Notifies RPMs, attorneys and the public that the set of volumes is incomplete.
- somebody may provide a copy
- cuts down on FOIA requests for missing volumes

If the multi-volume set is public, always “push” the metadata and PDFs of the volumes which are not missing to the public web pages despite the fact that the set has a missing volume(s)

Insert a slipsheet after the Volume 1 title page (or signature page if there is one) listing the missing volume(s) before loading the PDF to NIRIS.

The Volume 1 title metadata will identify a missing volume(s) and the slipsheet will confirm that there are missing volumes.

PARCEL Site Information in the Title Field

When a parcel has a letter and a number (Parcel G-2, Parcel A-3) use a dash between the letter and the number

When a parcel has letters and numbers (Parcel EDC-37 or Parcel ET-13-2) use a dash between the letter(s) and the number(s)

When a parcel has a single letter or number (Parcel E, Parcel 12 or Parcel A) do not use a dash

When a parcel has a number followed by a letter (Parcel 12A, Parcel 4C) do not use a dash

There are other types of “sites” in NIRIS which have standardized formats

Examples:

CAA, OUTFALL, AREA, BUILDING, BUNKER, UNK, ZONE, OU, OFFSITE_RW

Analytical Data associated with a Report or Reports

- Add analytical or laboratory data which is associated with a report as a separate, standalone document in NIRIS
- Analytical or laboratory data are usually very large files and if added to a report, will normally create download challenges
- Associate the analytical or laboratory data with the relevant report(s) using the keywords metadata field to cross-reference the data with the report(s) it supports
- Research the Author Affiliation and add it in the Author Affiliation data field. Do not use “Unspecified” unless it is absolutely necessary.
- **Most analytical data packages and validated data packages are associated with a site.** Research and find the AOC, SWMU, Site, UXO, UST, etc NUMBER. to which the data is associated. Do not use Basewide in the Site data field unless it is absolutely necessary
- **File Type**
 - Site File = Raw and Unverified Analytical Data Packages
 - Administrative Record File = Validated Data Packages
- **Validated Data Packages**
 - Create the title as: Validated Data Package, SDG #, Installation Name and State Abbreviation
 - Add Validated Data Packages to the Administrative Record File
 - Select ‘Analytical Data’ as the Document Type
 - Associate a site, etc. with the data package
- **Raw and Unverified Analytical Data Packages**

- Create the title as: Laboratory Data Package, SDG #, Installation Name and State Abbreviation
- Add Raw and Unverified Analytical data packages to the Site File
- Select 'Analytical Data' as the Document Type
- Associate a site, etc. with the data package
- **Special PFAS Reports Collections** (Off Base Drinking Water Sample Results, Level 2 Laboratory Reports, Level 4 Laboratory Reports, Electronic Data Deliverable, Data Validation Report, Sample Location Figure) are added to the Site File
 - The collection of documents was created and packaged specifically in response to a 2018 Freedom of Information Act request.

METADATA FIELDS

Keywords Metadata Field

Use this metadata field to add words which do not appear in a document title but are ones which NIRIS users may use to search for documents or information.

- If some information does not 'fit' in the title field, add it to the keywords metadata field
- Examples of words or phrases which could be added
 - site nickname(s)
 - sub site information
 - well information
 - alternate site numbers
 - location information
 - nearby physical features (lake, ocean, mountain)
- When an ER Search title search is performed, information added to the keywords field is also searched

- Documents which are “pulled” because of a keyword appear in the ER Search results

Record Date Metadata Field

- Undated old documents are rare but they do ‘turn up’
 - Use the ER Search to determine if the document is already in NIRIS
 - Use the ER Search to investigate and research the document to determine a 'reasonable' document date based on information within the document and the timeframe of other related documents in NIRIS
 - Try to determine the correct month and year a document was published or issued
 - Use the 1st day of the month when the actual publication/issue day cannot be determined
 - In extremely rare instances, use the date the document was entered as the document date and include a notation in the EDMS comments field
- Undated New documents
 - If the document is no more than 5 years old, contact the Project Manager to obtain the document date
- Many contractors and document creators put the month/year on a document but not the day it was issued
 - If a document is signed and dated, use the signed date

Contract Number Metadata Field

- Contract numbers are critical to the interaction between NIRIS and eProjects
- As of 1 October 2019, invalid (wrong format) contract numbers will not be accessible in EDMS
- Examples of the new contract number format will be used to store contract numbers so that they match the eContracts number format.
 - Contract N6247016D9008
 - Contract N6247016D9000

- Contract N6247014D9022

The EDMS Contract Number pull down menu will display the new contract numbers using dashes

Contract Task Order Number Metadata Field

- CTO numbers are critical to the interaction between NIRIS and eProjects
- NIRIS must have a complete CTO number because abbreviated CTOs will not match eProjects numbers when NIRIS is fully integrated with the authoritative source, eProjects
 - Direct contractors to print the long form CTO number on document title pages
 - Contact contractors and/or Project Managers to obtain long form CTO numbers
 - Direct contractors to put the long form CTO number on the Document Data Sheet Form
- When you have a long form CTO number which is not in EDMS, submit a support request to update the CTO number list
- Use the “presented” CTO number which are in the long format. The new CTO numbers begin with higher numbers like 3,4,5,6
- To determine whether the CTO number is incomplete, check to see if the number is only 4 digits and is 'high'
 - Example: Contract N6247016D9000 has the CTO number, 4068 printed on the document cover page. “4068” is a high number which means that it is abbreviated and should be a much longer number
 - Examples of the new CTO number
 - Contract Task Order N6247018F4116
 - Contract Task Order N6247017F4068
 - Contract Task Order N6247018F4136

Public Status Boxes

- **Check the Public Metadata box** for all documents added to NIRIS EDMS
 - Checking the Public Metadata box enables some of the document metadata will be available in the public installation specific Administrative Record File
 - Documents with classified titles is the ONLY reason to leave the box unchecked. At this time, there are no environmental documents with classified titles
- **Check the Public Document box** if the document has NO Sensitive Information
 - Checking the box enables the entire document to be available in the public installation specific Administrative Record File
 - Do NOT check the Public Document box if the document has Sensitive Information
 - Not checking the box prevents the document from being made available in the public installation specific Administrative Record File

FOIA Exemption(s)

Check the Document Data Sheet Form to see if the document submitter declared the document sensitive or not sensitive

Check the Document Data Sheet Form Notes field to see if the document submitter suggested a FOIA Exemption(s)

Review the pages cited by the document submitter to determine the applicable FOIA Exemption(s). See Appendix D, FOIA Exemptions for detailed information on FOIAs

If the document does not have a Document Data Sheet Form, review the document to identify sensitive information based on the FOIA Exemptions

Select the appropriate FOIA Exemption based on the type of sensitive information contained in the document

FOIA Exemption information will display on the EDMS cover page

Sensitivity Level (None, Partial, Full)

Select the sensitivity level based on the number and location of the instances of sensitive information within the document

- Select NONE if the document does not have sensitive information
- Select Partial if the document has instances of sensitive information
- Select Full if the entire document is sensitive

Exemptions/Cite Pages

- Cite the page number(s) for each FOIA Exemption
- Cited page number will print, with the associated FOIA Exemption, on the EDMS cover page

Distribution Statements

- Check the Document Data Sheet Form to see what the document creator recommended as a Distribution Statement
- Documents must have a Distribution Statement
- Distribution Statements will print on the EDMS cover page
- See Appendix N, Distribution Statement Guide for more information

Author and Recipient Metadata Fields

- The fields do not require data entry. The fields can be left blank if no Author or Recipient personal name can be identified
- Do not use “N/A”, “None”, “Unknown” or any other designators in these data fields. It is not permitted
- Add a single author and a single recipient regardless of how many authors or recipients are listed
- Add the first listed author and the first listed recipient

Author Format

The author format is: last name, (comma, single space) first initial. There is no period (.) following the first initial.

Author

- Author Example #1: Smith, B
- Author Example #2: Johnson, D

- If there is an identical piece of correspondence which is sent to multiple recipients, add each piece of correspondence as a separate entry in NIRIS

- Do not bundle correspondence together and add as a single entry

Title for an Individual

If an individual author has a title (Captain, LCDR, Dr., Honorable, Senator, etc.), add the title after the initial in the Author field. The Author name and individual title are separated by a comma

- Title Example #1: Captain B. Smith - Enter the title in the Author field as:
 - Smith, B, Captain
- Title Example #2: Senator D. Nothing - Enter the title Author field as:
 - Nothing, D, SENATOR

Suffix for an Individual

If an individual has a suffix (Jr., Sr., III, PhD, etc.), add the suffix after the initial in the Author field. The Author name and suffix are separated by a comma

- Suffix Example #1: D Johnson Jr – Enter the suffix in the Author field as:
 - Johnson, D, Jr
- Suffix Example #2: A. Jones PhD Enter the suffix in the Author field as:
 - Jones, A, PhD

Recipient Affiliation Data Field

- This is a required data field
- The data field does not print on the EDMS cover page
- Do NOT leave the data field blank if the Recipient Affiliation cannot be identified
- Use the word, **Unspecified**, if no Recipient Affiliation can be identified
- Do not use “N/A”, “None”, “Unknown” “Unknown – Verify Affiliation” or other similar designators in this data field.

Author Affiliation Data Field

- This is a required data field
- The Author Affiliation information prints on the EDMS cover page
- Do NOT leave the data field blank if the Author Affiliation cannot be identified
- Use the word, **Unspecified**, if no Author Affiliation can be identified
- Do not use “N/A”, “None”, “Unknown” “Unknown – Verify Affiliation” or other similar designators in this data field

Comments Metadata Field

Open Text EDMS data field where useful information about the document can be added

This data field is not available for searching using the ER Search or on the NAVFAC installation public web pages

The field can only be accessed via NIRIS EDMS.

Sites Metadata Field

- Select the sites or site groups for the record. Site groups are expandable to list each individual site contained in the group
- To select the entire group, check the box next to group. All sites within the group will automatically be selected
- To select individual sites in a group, expand the group and check the box next to the individual sites

- Sites listed in **red** do not have an associated NORM site and cannot be selected

NORM site numbers are sourced from NORM. They cannot be created or modified in EDMS

Background

Background will become a choice in the EDMS Site Field pull down menu. It will appear as a choice in the ER Search Site Field if Background is selected in the EDMS Site Field when a document is added to EDMS

Use “Background” for specific background investigations, background documents and analytical data if some (or all) of the data is part of a Background data set.

Examples include:

- Soil Background Studies
- Groundwater Background Studies
- Background Sediment Sampling
- Background Evaluation Reports
- Facility Background Studies
- Background Data
- Background Metal Evaluations
- Background Constituent Concentrations
- Background Investigations

EDMS tooltip: “Specific installation background documents and data”

Basewide

Basewide will be a choice in the EDMS Site Field pull down menu and the ER Search Site Field if Basewide is selected in the EDMS Site Field when a document is added in EDMS

- 1) Before selecting Basewide, determine if the document can be associated with one or more sites, AOCs, SWMUs, USTs, UXOs
 - Review the Document Data Sheet Form
 - Review the document title, table of contents and executive summary
 - Check with the appropriate Project Manager

- 2) Documents which are or include sampling data should not generally be labeled Basewide. Sampling is almost always performed at specific sites, AOCs, SWMUs, UXOs, USTs. Do not use Basewide unless it applies to the document
- 3) Do not use Basewide If a document or data can be associated with a site, AOC, SWMU, UXO, UST or multiple sites, etc.

Use “Basewide” for the following types of documents

- 1) Documents which are associated with a specific installation site called BASEWIDE
- 2) Documents which cover the entire installation and are (typically) associated with all sites, SWMUs, AOCs, UST, UXOs on the installation (fence to fence)

Examples include:

- Basewide Vapor Intrusion Evaluations
- Basewide Health and Safety Plans
- Basewide PFAS/PFOA Reports
- Basewide Radiological Management Plans
- Basewide Finding of Suitability to Lease (or Transfer)
- Basewide Petroleum Site Evaluation
- Basewide Tank Closure Reports
- Basewide Well Abandonment Reports
- Community Involvement Plans
- Federal Facility Agreements
- Hazard Ranking Documents
- Basewide Munitions Preliminary Assessments
- Basewide Work Plans
- Initial Assessment Studies/Preliminary Assessments
- Site Management Plans

Before selecting Basewide, ensure that 5-Year Reviews actually cover all sites, SWMUs, etc., on an installation. If the Review does not cover all of the sites, SWMUs, etc., all site, SWMUs, etc., add all of the sites, etc., the Review covers in the Site Field pull down menu.

When Basewide is selected in the Site Field pull down menu, Basewide will automatically associate with a NORM site which was created and is named, “NONE”.

- 3) **Documents which are not specifically associated with any site, SWMU, AOCs, UST, UXOs on the installation**

This include documents which cannot be associated with a single site on the installation because it is a guidance document, magazine article, scholarly article, instruction, federal or state statute or law, federal or state regulation.

In very rare instances, these types of documents can be associated with a site.

Generally, use the Title field rather than the Site field to search for the types of documents listed below

Examples include:

- Scholarly and technical articles
- Newspaper articles
- CNO Guidance
- USMC, DoD and DoN Instructions and Policies
- Federal and state laws and statutes
- State Guidance
- Installation Guidance
- US EPA documents and guidance
- ATSDR documents
- Other guidance documents required by Records Management, For example: OSWER Directive 9833.3A-1 *Final Guidance on Administrative Records for Selecting CERCLA Response Actions* and updates.

When a Site Field search is done, documents flagged Basewide which are associated with all sites on an installation or not associated with any site, AOC, SWMU, UST, UXO, etc., on an installation will not appear in the ER search results

Distribution Metadata Field

- This data field is used by some NAVFAC Commands (Southwest, Hawaii and the Marianas) to track documents and to identify physical locations where Information Repositories and Administrative Record Files are housed

QUESTIONS TO ASK

READ WHAT YOU HAVE WRITTEN BEFORE YOU HIT THE SAVE BUTTON

- Does the title you copied or created make sense?

- Did you accurately and fully describe the contents of the document?
- Did you standardize the titles for a document with multiple volumes?
- Did you standardize the titles of associated documents?
- Do you need to add additional information in the keywords metadata field to enhance search capabilities for a document?
- Did you use an acronym or abbreviation in the title which needs to be written out?
- Did you use punctuation or other symbols in the title which need to be written out or do not need to be in the title?
- Does the title you copied or created 'flow' or is it awkward?
- Is the title you copied or created is good English?
- Will the users be able to find what they are looking for based on what you added in EDMS?
- Are you confident that the metadata you created will be understood by the public?