



Early Detection of Invasive Plant Species Monitoring Plan

Standard Operating Procedure #11: Workspace Setup and Records Management

Version 3.1 (6 June 2017)

Change History

New Version	Revision Date	Author	Changes Made	Justification
1.0	2007	PACN	Developed.	
2.0	2/8/2012	A. Addlesberger	Update project workspace folder structure.	Reflects changes made to the Managing Photographic Images SOP.
3.0	2/16/2016	K. Kozar	Updated project workspace folder structure and archival and records management section.	Reflects updated procedure since last version.
3.1	6/6/2017	A. Ainsworth	Updated for ED plan.	Developed for EIPS.

Only changes in this specific SOP will be logged here. Version numbers will be incremented by a whole number (e.g., Version 1.3 to Version 2.0) when a change is made that significantly affects requirements or procedures. Version numbers will be incremented by decimals (e.g., Version 1.6 to Version 1.7) when there are minor modifications that do not affect requirements or procedures for publication in the series.

Purpose

This SOP describes how to set up a project workspace on one's computer, and describes the PACN Digital Library which is used for archival of data products within Pacific Island Network (PACN) parks as part of the Early Detection of Invasive Species Monitoring Plan (Ainsworth et al. 2017).

Set up project workspace

A section of the networked PACN file server is reserved for this project, and access permissions are established so that project staff members can access needed files within this workspace. Prior to each season, the project lead should make sure that network accounts are established for each new staff member, and that the data manager is notified to ensure access to the project workspace and databases. Network connections are too slow for efficient data entry and processing, so individual staff members should set up a workspace on their own workstation, with daily data transfer to the PACN server to protect against data loss.

The required file structure within this workspace is shown in Figure 1. Certain folders – especially those for Global Positioning System (GPS) data and images – should be retained in separate folders for each calendar year as shown in Figure 1. This will make it easier to identify and move these files to the project archives at the end of each season.

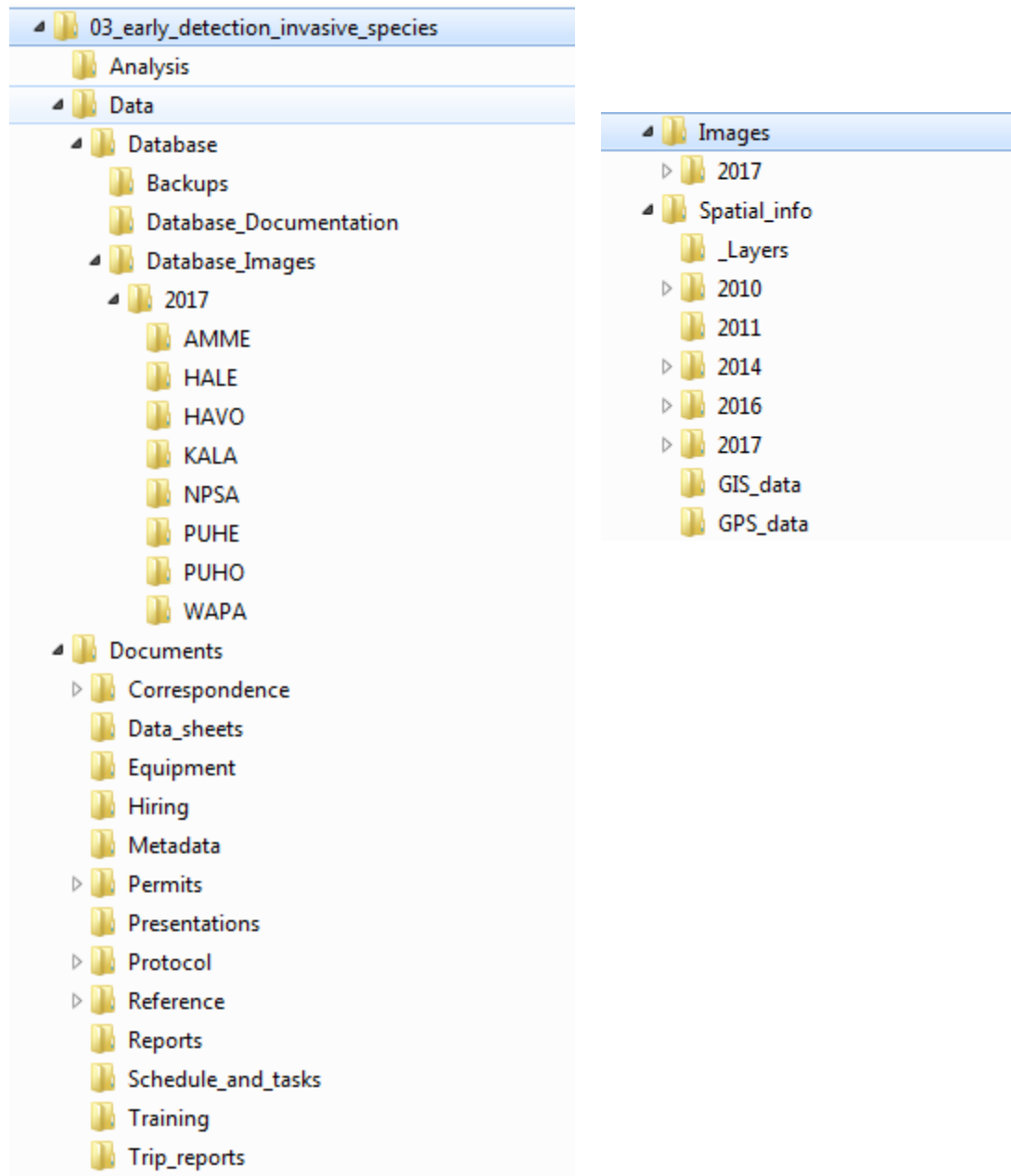


Figure 1. Required file structure for the Early Detection of Invasive Plant Species project workspace.

Images that are to be linked to the database must be placed within the proper folder structure within the Database folder.

Within the Database folder there will be a folder called “Database_images”. This folder should contain a folder for the current monitoring year with subfolders for each park. Images that are to be

linked to the database should be organized in individual folders by location and date of sampling event, and placed appropriately within the database folder. This will ensure that when the images and database are moved, the links to these files will be updated in the database. The database must be in the database folder for the links to work. All other images should go into the “Images” folder in the main directory.

Each major subfolder is described as follows:

- Analysis – Contains working files associated with data analysis.
- Data – Contains subfolders to categorize project data and the database files.
- Documents – Contains subfolders to categorize documents as needed for various stages of project implementation.
- Images – For storing images associated with the project (refer to SOP#13 “Managing Photographic Images”). Note that this folder contains subfolders to arrange files by year.
- Spatial info – Contains subfolders that arrange files relating to visualizing and interacting with GIS data by year and layers. Yearly folders are organized by Park and contain the following subfolders.
 - ArcMap_Products – Map products.
 - GIS_Data – New working shapefiles and geodatabases specific to the project.
 - GPS_Data – Contains GPS data dictionaries, and raw and processed GPS data files.

Naming Conventions

Folder Naming Standards

In all cases, folder names should follow these guidelines:

- No spaces or special characters in the folder name.
- Use the underscore (“_”) character to separate words in folder names.
- Try to limit folder names to 20 characters or fewer.
- Dates should be formatted as YYYYMMDD.

File Naming Standards

In all cases, file names should follow these guidelines:

- No spaces or special characters in the file name.
- Use the underscore (“_”) character to separate file name components.
- Try to limit file names to 30 characters or fewer, up to a maximum of 50 characters.
- Dates should be formatted as YYYYMMDD.
- Correspondence files should be named as YYYYMMDD_AuthorName_subject.ext.

Archival and Records Management

All project files should be reviewed, cleaned up and organized by the project lead on a regular basis (e.g., annually in January). Decisions on what to retain and what to destroy should be made following guidelines stipulated in NPS Director’s Order 19 (<http://data2.itc.nps.gov/npspolicy/DOrders.cfm>) which provides a schedule of records retention. Because this is a long-term monitoring project, good

records management practices are critical for ensuring the continuity of project information. Files will be more useful to others if they are well organized, well named, and stored in a common format. Hard copies of field data forms should be stored in the designated filing cabinet for three years as specified by NPS Director's Order 19.

To help ensure safe and organized electronic file management, PACN has implemented a system called the PACN Digital Library, which is a hierarchical digital filing system stored on the PACN file servers. The typical arrangement is by project, then by year to facilitate easy access. Network users have read-only access to these files, except where information sensitivity may preclude general access.

Digital products are to be delivered for long-term storage according to the project schedule in SOP #17 "Product Delivery Specifications". Submission of certified products occurs by emailing the data manager the PACN Product Submission form and PACN Project Data Certification form (available from the data manager or on the PACN I drive). The data manager receives these forms and transfers final products and files to the PACN Digital Library. The master versions of all digital files relating to the Early Detection of Invasive Plant Species Monitoring Plan are stored within the PACN Digital Library, with daily file back-ups accomplished automatically. Analog (non-digital) materials are to be handled according to current practices of the individual park collections.