

# ServCat Document Selection Guidelines

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## Introduction

The Service Catalog, or ServCat, is an online application designed to centralize and preserve information about the U.S. Fish and Wildlife Service (Service) or used by the Service. Historically important and management relevant documents- such as reports, management plans, geospatial data, and survey protocols- are now easily accessible. ServCat enables employees to discover information between programs, regions, and refuges, which promotes collaboration and minimizes redundancy across the Service.

The ServCat document selection guidelines were developed for selecting appropriate documents to upload into ServCat. A primary goal of the ServCat project is to increase accessibility of natural resource information to managers and biologists engaged in planning, management, and decision making. The following guidelines will ensure long-term accessibility and usability of the Service's documents and data.

## Overview

Selecting documents to populate into ServCat is an important process. Appropriateness and relevancy of a document should both be considered. Documents that are uploaded into ServCat should have complete metadata (title, description, date, contacts, and size), and be clean, final copies. Draft versions should not be considered— unless a final copy is not planned or no longer exists. Budget, contractual and personnel files are not appropriate for ServCat, as well as documents that are irrelevant to the Service and its staff. When beginning to upload documents into ServCat, determining priorities will make the process easier.

\*\*\*Please refer to the Metadata Guidelines under Data Entry Tools of the Help section on ServCat for separate guidelines specific to *metadata and datasets*. Furthermore, please see the Guide to Entering Survey Protocol Frameworks and Guide to Entering Site-Specific Survey Protocols under Guides to Entering Common Documents of the Help section for specific instructions on *PRIMR related documents*.

## Priority Documents

Populating ServCat with Service documents is a long term process that can efficiently be accomplished by prioritizing documents. Priority documents are of high importance, referenced frequently or are irreplaceable. Targeting those critical documents ensures they will be chronicled and easily retrieved for future use. Priorities are determined at the national, regional and local organizational levels.

The Inventory and Monitoring (I&M) Initiative has identified national priority documents to be entered into ServCat. It is recommended that these documents be targeted along with regional and local needs during data mining efforts.

### **I&M Initiative Priorities**

**1. Refuge Narrative Reports:** Commonly referred to as annual narrative reports. These documents summarize refuge accomplishments for the year.

**2. Refuge Management Plans:** High priority plans include Comprehensive Conservation Plans (CCPs), Habitat Management Plans (HMPs), Refuge Master Plans, Water Management Plans, Disease Contingency Plans, Fire Management Plans, Forest Management Plans, Cropland Management Plans,

Fishing Plans, Trapping Plans, Safety Plans, Search and Rescue Plans, Sign Plans, Crowd Control Plans, and Law Enforcement Plans

**3. Water Resource Inventory and Assessments & Supporting Documents:** Target documents include Water Management Plans, Hydrogeomorphic Analysis Reports, Water Monitoring Plans, USGS North American Water Quality Assessments conducted near the refuge, Contaminant Investigations, and other relevant water quantity and quality monitoring data with sufficient metadata or analysis.

**4. Recently Completed Documents:** Target document types include finalized unpublished reports, plans, and datasets (including surveys and GIS data).

## Common ServCat Reference Types

The following reference types are commonly used in ServCat, and are typically sufficient for most users' needs. Core attributes of these reference types are defined in the ServCat Help Manual Chapter 6.3, Reference Attribute Definitions.

**Generic Document:** Any original or official paper that conveys information. Applied to any type of document that cannot be more specifically defined (e.g., as a plan).

*Example:* Trumpeter Swan Information

**Plan:** Any type of generic planning document, including monitoring or management plans.

*Examples:* Habitat Management Plan, Refuge Master Plan, Law Enforcement Plan

**Published Report:** A formally published document which presents focused, salient content to a specific audience. Reports are often used to display the result of an experiment, investigation, or inquiry. Often, the publisher is different than the report author.

*Example:* Published visitor survey results

**Unpublished Report:** A document which presents focused, salient content to a specific audience. Often a piece of information used to describe the result of an experiment, investigation, or inquiry.

*Examples:* Annual narrative reports, HGM reports

## ServCat Document Core Attributes

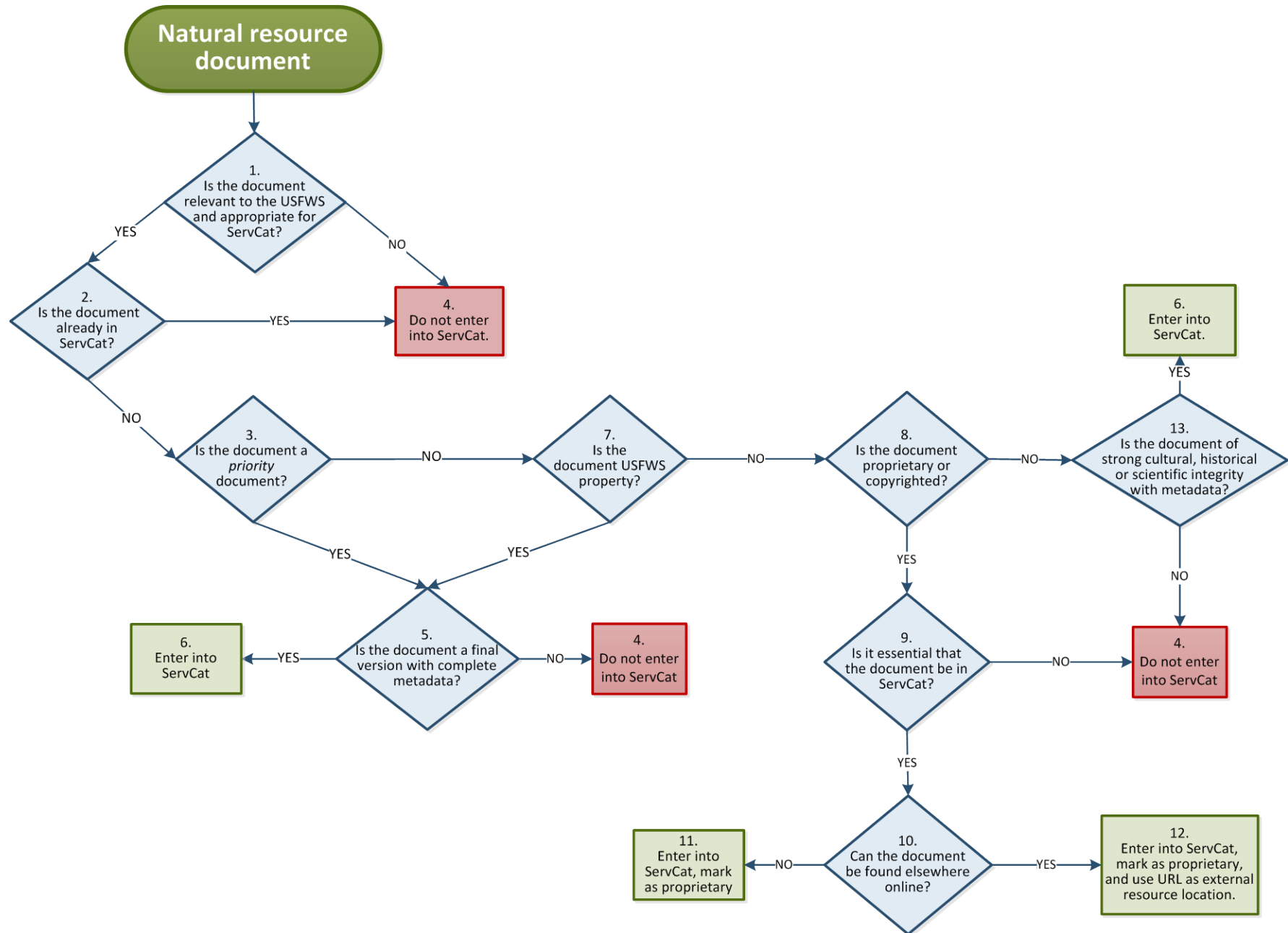
The following core attributes (metadata) are required when entering a ServCat document record.

1. Title
2. Date Issued/ Released
3. Purpose (Abstract/ Description)
4. Author or Staff Contacts
5. Keywords
6. Organization(s)

## Document Selection Tools

The document selection flowchart and dichotomous key on the following pages are aids to determine if or how a document should be entered into ServCat. The flowchart is a visual aid and quick reference guide that can be used with the dichotomous key. This dichotomous key provides detailed written explanations for each step shown in the flowchart. Use these tools together or separately to determine if or how a document should be entered into ServCat.

## Document Selection Flowchart



## Document Selection Dichotomous Key

**Use this key in conjunction with the flowchart or separately to determine if a document should be entered into ServCat.**

**1.** Is the document relevant to the U.S. Fish and Wildlife Service (Service)? Relevant files include only those files which are informative or useful for the Service and its staff. Inappropriate files include budget, contractual and personnel files.

Yes..... 2  
No..... 4

**2.** Is the document already in ServCat? Perform a preliminary search to confirm that the document is not in ServCat.

Yes..... 4  
No..... 3

**3.** Is the document considered a national or regional priority? National priority documents are: 1) Narrative Reports 2) Plans 3) WRIAs/HGMs and related documents 4) Datasets with complete metadata. Regional and station priorities may differ; refer to the Regional Data Manager or zone biologist for local priorities.

Yes..... 5  
No..... 7

**4.** Do not add the document to ServCat. The document does not meet the requirements to be in ServCat. Maintain document in local office files as necessary or convenient.

**5.** Is the document a final version with complete metadata? Minimum metadata requirements to enter a document into ServCat are title, description, date, contacts, and size. If a final version does not exist or is not planned, an unmarked draft version is acceptable.

Yes..... 6  
No..... 4

**6.** Enter the document into ServCat. Choose the appropriate reference type based on definitions in the guidelines to entering documents into ServCat. If the document is a draft, put 'draft' in brackets next to the title. Mark sensitivity and quality as appropriate.

**7.** Is the document U.S. Fish and Wildlife Service property? Was the document funded by the Service or written for the Service by Service staff, contractors, partners or associated agencies?

Yes..... 5  
No..... 8

**8.** Is the document proprietary or does it have a copyright? Examples of copyright or proprietary documents include journal articles, published books, conference proceeding papers, publications, dissertations, etc.

Yes..... 9  
No..... 13

## U.S. Fish and Wildlife Service

**9.** Is it essential that the document be in ServCat? Is the document highly informative or referenced frequently? Would the document be useful for other Service users? Is the document hard to replace, and at risk for damage or permanent loss?

Yes..... 10  
No..... 4

**10.** Can the document be found elsewhere online? Does the document have a permanent location elsewhere, such as JSTOR, USGS Published Reports, NPS Data Store or university dissertation databases?

Yes..... 12  
No..... 11

**11.** Enter the document into ServCat. Choose the appropriate reference type based on definitions in the guidelines to entering documents into ServCat. Mark the proprietary evaluation as *proprietary/copyrighted* and select the appropriate permission setting. Refer to the Help Manual, Section 6.2 for more information.

**12.** Enter the document into ServCat. Choose the appropriate reference type based on definitions in the guidelines to entering documents into ServCat. Mark the proprietary evaluation as *proprietary/copyrighted* and select the appropriate permission setting. Refer to the Help Manual, Section 6.2 for more information. Use the document's URL as the external resource location (for example: <http://pubs.usgs.gov/sir/2013/5003/pdf/SIR2013-5003.pdf>)

**13.** Is the document of strong cultural, historical or scientific integrity with complete metadata? Does the document contain pertinent information for the Service and its staff? For example, a historical diary.

Yes..... 6  
No..... 4