Walk-Through on EDDMapS Project Managing, Reporting, Communication, and More

https://www.eddmaps.org/
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What is a Project?

Projects — A way to aggregate, access, or manage data that would be difficult otherwise

- Evaluate success of reporting or awareness campaign — Reporting observations in a specific project allows the Project Admin know data that came in as a response to the campaign as opposed to records that came in otherwise

- Limit Data — Data must conform to project parameters
  - Projects can have a species list
  - Projects can have a member list
  - Project Admins can remove records from their project
  - Project Admins can remove members from their project

- Project Dashboard — Basic graphs and statistics available to project members

- Project Admins and data privacy — Project Admins can see certain records and information about records that may not be available to the public
  - Private coordinates on records are viewable
  - Anonymous account names are viewable
  - Reviewed and Unreleased records are viewable
  - Summaries of unreviewed records are available

Projects Dashboard

- Counts of Records and members in project
- Graphs to show top reporters and most reported subjects
Top of Page Options

Home — Takes you back to main page

Report Sightings — Reporting form for documentation of individual sightings of invasive and pest species in the United States, Canada, and more

Distribution Maps — State, County, and Point level species maps to view, download, etc.

Species Information — Species descriptions, images, maps, resources, etc.

Tools & Training —
  • Tools — Lookups, Query building, Quick stats, etc.
  • Training — Walk-throughs, Webinars, Data dictionaries and templates, etc.

My EDDMapS — Access and manage your profile, data, settings, projects, etc.

About — History and scope of EDDMapS

About Us — Information about the Center for Invasive Species and Ecosystem Health

Contact Us — Email address, phone number, physical address, etc.

User Icon —
  • Register for Account, login to existing account, or My Profile and name displayed
  • If Logged in:
    My Profile — takes you to current profile with button to Edit
    My Messages — Record of all messages sent to your email address

Logout
Creating a Project

Accessing “Create Project”
- Login to EDDMapS
- My EDDMapS —> Projects —> Create Projects

Add Project Information
- Project Name
- Project Description — Information in this section is searchable by users in Explore Projects
- Project URL — Your project’s website address
- Is Project Public — Governs if the project shows up on the Explore Projects page for users to learn about and request to join
- Admins — EDDMapS accounts that will have the role of Project Admins; they will be able to access all parts of the management, members, and records associated with the project
- Location — Geographic scope of the project; this is a searchable field in the Explore Projects page
- Subjects — Species or other subjects that encompass the scope of the reportable options in the project. If this is left blank, any subject in EDDMapS will be an option for reporting in this project.
Dashboard
Statistics on project and participants

My Records
- View, Edit, and otherwise manage your own records that are in this project

Contact Admins
- Interface through which project members can send a message to the Project Admins

Project Admin
Manage Project
- Edit information about the project

Manage Brand
- Add logo, colors, social media, etc. that are associated with your organization or project
- Alert Sender Email allows emails to look like they came from an email address associated with the project
- Signature and Contact Info will be added to emails that are sent out to project members

Manage Users
- Add project members, assign roles, and remove project members

Invite Users
- Add email addresses for people you wish to invite to join the project

Contact Users
- Compose an email that will be sent out to project members

Leave Project
- Leave the project
Elevate a project member to Project Admin before you go so someone is in charge
Alert Sender Email
- Set custom email address for messages coming from the project to appear to be sent from

Logo, color, and URL
- Features to add so the emails will follow the project’s brand

Social Media and RSS
- Links to social media accounts related to the project

Signature and Contact Info
- Information to include at the bottom of emails from the project

Preview
- View how it will look
Add Users
- Project name — Set on the Manage Project page
- User(s) — Add EDDMapS users to the project by their name
- User Role — Assign roles to the users

Administrator — Can edit Project information, invite/add/remove users, remove records, and access private information associated with records in the project (coordinates, unreleased records, anonymous names)

User — Can submit records to the project, see project dashboard, and contact Project Admins

Invited Users
- Lists the email addresses that have received invitations to join the project and their status

Manage Users
- List of Project Members and their roles
- Change project roles
- Remove member from project

Removing a member from the project will prompt the user to remove their records from the project
Invite Users allows Project Admins compose a message to the Users or other Project Admins that will be delivered to their email account.

If Manage Brand has information in it, it will be applied to the emails.

Invite Users to join your project even if they don’t have an EDDMapS account yet.

Add their email addresses here and click send, they will receive an email with the invitation.

Contact Users allows Project Admins compose a message to the Users or other Project Admins that will be delivered to their email account.

If Manage Brand has information in it, it will be applied to the emails.
Manage Records

Filtering
- Filter the records that show up in the table by Subject, Reporter, Observation Date, and/or Date Entered

Table
- Displays the records that are entered into the project and some basic information about the records
- Sorting available in all fields A-Z/Z-A, Oldest/Newest, or Lowest/Highest
- Search bar allows for searching for records with information that is not in the standard filtering options
- Clicking on the Record ID will allow you to open the Record Detail page; Unreviewed records are not clickable and so only the standard table information is available

Remove Records
- Select the records to remove from the project by checking the boxes to the left of the Record IDs
- Click the green Remove Records button

Download Records
- Currently, downloading can be done via the Advanced Query Tools page on the Tools page
Explore Projects

- Accessed via the My EDDMapS — Projects drop down menu
- Filter projects by species they are reporting, geographic scope they cover, and/or their name or information in their description
- Click on the Project Name to go to that project’s Project Info page, which includes links to contact the Project Admins and request to Join the project
- Only includes projects that are listed as Public
User’s Project Options

Projects
- Dashboard — Stats and other information related to the project selected
- Create Project — Establish a new project
- Explore Projects — Search for projects that have been created, are public, and are active

My Records
- Search, View, Edit, Revisit, or Delete your reports

Contact Admins
- Page to send an email to Project Admins

Leave Project
- Remove yourself from the selected project

Project selector top left
Switching between projects can change statistics, sidebar options, etc. based on roles in projects

Dashboard
- Statistics on project records and participants

My Records
- Search, View, Edit, Revisit, or Delete your reports

Contact Admins
- Page to send an email to Project Admins

Leave Project
- Remove yourself from the selected project
User’s Project Options

Projects—My Records

- Filtering — Options to filter by Location, Dates, and Subjects
- Manage Records — View, Edit, Delete, or Move Records

Text below the Records table notifies the project member that privacy settings on their records in the project will be suspended for Project Administrators; Anonymous, Private, and Unreleased statuses will not apply to the Project Admins.

Move Records

Move records from one project to another. This allows a project member to ensure the records they are submitting are in the project they should be in and to move records from a project they are leaving into another project they are in.

Records can only be moved into a project that would accept it based on the project’s parameters.

Project Admins are notified that the records have been moved out of the project.
Reporting Form—EDDMapS Pro App

App Settings — Refresh Projects and Species Lists

Reporting

- Begin the report (by location or with a photo)
- Select Subject
- Projects menu below subject name
Projects available to report into will be limited to projects you are a member of AND are accepting records with the subject you are reporting
Example Project Work Flow

<table>
<thead>
<tr>
<th>Project Roles and Responsibilities</th>
<th>Other EDDMapS Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Administrators</strong></td>
<td><strong>System Administrators</strong></td>
</tr>
<tr>
<td>• Create projects and set project parameters</td>
<td>• Work with Project Administrators</td>
</tr>
<tr>
<td>• Add Project Administrators and Users to Project</td>
<td>• Add reportable subjects to the database</td>
</tr>
<tr>
<td>• Manage Project’s Brand</td>
<td>• Create custom forms with program partners</td>
</tr>
<tr>
<td>• Communicate with Project Members about the project</td>
<td>• Publish maps</td>
</tr>
<tr>
<td>• Manage records in project</td>
<td><strong>Verifiers</strong></td>
</tr>
<tr>
<td><strong>Users</strong></td>
<td><strong>Verifiers</strong></td>
</tr>
<tr>
<td>• Report Sightings that fit project parameters</td>
<td>• Reviews EDDMapS records; ensuring data quality</td>
</tr>
<tr>
<td>• Move records in and out of projects</td>
<td>• Release records to the public; allowing them to show up on maps, in downloads, etc.</td>
</tr>
</tbody>
</table>

**Procedure**

1) **Prospective Project Administrator** Evaluates Needs
   - Do you need a project, or can your needs be met by other tools? Projects allow you to communicate with reporters, have access to a project dashboard, and aggregate records that would be difficult to query in the Advanced Query Tools.
   - Does your project involve repeated monitoring of traps or sites? Does your project need a custom form? Contact **System Administrators** to explore more advanced Project options.

2) **Project Administrator** Creates Project and Adds Information
   - Create Project, including filling out the description
   - Fill out the fields in the Manage Brand section to ensure the project’s name and brand are used for project communication

3) **Project Administrator** Adds Project Members and Assigns Roles
   - Setting the project to Public allows it to be searchable by EDDMapS Users and they can request to join
   - Inviting and adding **Users** to the Project encourages record submission
   - Assigning Roles allows additional project administrators to be added to help manage the project

4) **Records Submitted to Project and EDDMapS Database**
   - **Users**, and other Roles, can submit records through the Project forms, Apps, and EDDMapS website
Example Project Work Flow

Procedure

5) **Verifiers** Review Records
   - **Verifiers** evaluate the records submitted by **Users** for accuracy and completeness and submit their review and, if appropriate, release records for public use
   - EDDMapS **Users** can request **Verifiers** status, or request **Verifiers** status for others, through the Request to be a **Verifier** menu option in My EDDMapS. Process for reviewing records can be found on the EDDMapS Training page

6) **Records are Public (If Released by Verifiers)**
   - Publicly available records appear on maps, in statistics, in downloads, and more

7) **Project Administrator** Continues to Manage Project
   - As needed, **Project Administrator** manages **Users** and other Roles, communicates with Project Members about the project, edits project info, and more through the project’s life cycle

Have questions?

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