

1 J. Connolly Updated 6/6/2017  
2  
3 Time line to complete update: ~ 6 Months from when updated master species list in locked- See outlined time  
line  
4 Time line Assumptions: Range files updates (~3 Months) and Bin assignment (~1 month) received on time;  
Troubleshooting  
5 new Range composites and HUC2 assignments to new composites is minimal  
6  
7 Purpose: Incorporate the updates to the species HUC and bin assignments, change may be to the huc 2 based  
on a spatial  
8 range change or to the bin assignment. During each update all support species information such as listing  
status, WoE  
9 group etc will updated to match the current master species list. New species are add to the table and removed  
species  
10 are filtered. All removed species an associated bin information will be retained in the archived, just removed  
for the  
11 active table.  
12  
13 Output file structure:  
14  
15 The table\_folder variable is the path to the folder where all output tables will be saved. This variable needs to  
remain  
16 static the entire update. Within the output folder there needs to be an [Archived] folder where all input tables  
used  
17 for the update need to be saved and all intermediate and record keeping tables, ie bin assignments for  
removed species,  
18 will be saved located. The updated coded bin assignment table,[UpdatedBins[date].csv] finalized at the end of  
step 2  
19 should be loaded into the bin tracking database. [LongBins\_PP\_filter\_AB\_[date].csv], end of Step 6,goes to [C.  
Peck] to  
20 be incorporated into the Post Processor. [WideBins\_unfiltered\_AB\_[date].csv] end of step 7 used as bin able  
for BE  
21 attachment.  
22  
23 Key Assumptions:  
24 \*\*\*Coded bins values are hierarchical, a higher number trumps a lower number when collapsing\*\*\*  
25 #####  
#####  
26  
27 Before the Bin update can be started:  
28 1) Range composite files will need to be finalized  
29 2) Species/HUC12 crosswalk will need to be generated  
30 3) ESA WOE groups crosswalk used by post processor  
31  
32 Documents/Tools dependant on output from update:  
33 1) Update to bin tracking database (Current\_Bins\_tobeLoadDB\_[date].csv from Step 2  
34 2) Post-Processor (LongBins\_PP\_filter\_AB\_[date].csv from Step 6  
35 3) Active Bin table used in BE documents (WideBis\_unfiltered\_AB\_[date].csv from Step 7  
36 4) Updates to WoE/MagTool

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37
38 #####
39 #####
40 Time line to complete update: ~ 6 Months from when updated master species list in locked
41 Step 1: Date to lock master list set by team
42 1) Lock master species list with support species information
43 1) Set date on when update Range files need to be received
44 4) Add HUCs for a species based on range updates
45 5) Removed HUCs for a species based on range updates
46
47 Step 2: 2 weeks from date due date for updated Range files- typically 3 months from locking master species list
48 2) Finalize Range composite files and HUC12 crosswalks from theses files.
49 2) Update ESA WOE groups crosswalk used by post processor
50
51 Step 3: 2 Weeks from when Step 2 is complete
52 Assumption: Time estimate includes 1.5 weeks of troubleshooting of new range composite files
53 3)Run HUC2 for the update range files
54
55 Step 4: 1 Day from when final crosswalks (HUC12/WoE groups- Step 2) and final HUC2 change tables (Step 3)
    are received
56 4) Update HUC2 assignments in the current bin table
57 4) Submit species without an bin assignment to Services for review- brand new species or new HUC2 add
58
59 Step 5: 3 weeks from when the Services provided updated bin assignments- typically 1 month after sending the
    request
60 Assumption - Time estimate includes 2.5 weeks to address questions on the updates received by Services.
61
62 5) Incorporate Services feedback
63 5) Load the updated coded bin table to the bin tracking database
64 5) Complete remaining steps for bin update
65 5) Provide post-processor table to [C. Peck] to be loading into Post Processor tool
66 5) Provide table used for BE Attachment to [J.Connolly] to be finalized for chemical
67 #####
68 #####
69 General Notes:
70 Starting input tables that need to be moved to [Archived] folder at the table_folder location:
71 1) Master species list
72 2) ESA WoE group crosswalk (long format)
73 3) HUC2 a/b assignment by HUC12
74 4) Species HUC12 crosswalks
75 5) HUC2 added and removed tables
76
77 Step 1 and 2:
78 User must set boolean variables :collapse_huc and collapse_new_HUCS_only
79
80 If just only collapse_huc all species will multiple will hucs will be collapsed to single bin assignments applied to
81 each HUC. (NOTE: HUC specific assignments will be lost)

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82  
83 If both are set to true, when a new HUC is added for a species with a bin assignments for other HUCs, a bin  
assignment  
84 will be generated that include all bins.  
85  
86 Cannot set collapse\_huc to False if you want to generate a bin assignment to for the new hucs by collapsing.  
87  
88 Species information is updated on active coded bin assignment table, identifying new species without any bin  
assignment  
89 and species with new HUC2 with a bin assignment that is collapsed from all other HUC2s  
90 - UpdatedBins[date].csv [Updated] column  
91 1) Species without a range file - New Species  
92 2) Species with an added huc and a bin assignment collapsed from previously assigned HUCS with a huc  
specific  
93 bin assignment - [New HUC add - Collapsed, huc specific bin assignments]  
94 3) Species with an added huc and a bin assignment collapsed from previously assigned HUCS, no huc  
specific bin  
95 assignments - [New HUC add - Collapsed, No, huc specific bin assignments]  
96 4) Collapsed all HUCs to a single bin assignment with a huc specific bin assignment - [All hucs collapsed,  
97 included huc -specific bin assignments]  
98 5) Collapsed all HUCs to a single bin assignment without a huc specific bin assignment - [All hucs  
collapsed,  
99 no huc specific bin assignments]  
100 - UpdatedBins[date].csv column immediately following the EntityID column  
101 1) Make note of a species that has been removed from the current master list. Bin assignment and  
EntityID will  
102 still be found in table but the species supporting information. Archived of dropped species with species  
103 with species supporting information can be found in the DroppedSpecies\_[date].csv table  
104  
105 All bin assignments for new species and new HUCs should be verified by the Services.  
106 - Table Species\_w\_NewHUC2\_[date].csv will have all species with new huc 2s  
107 - UpdatedBins\_[date].csv can be filtered using update column. Boolean variables collapse\_huc and  
108 collapse\_new\_HUCS\_only variable allows user to generate bin assignments for species with a new huc  
based on the  
109 previous assigned hucs.  
110  
111 Steps 3-7  
112  
113 Converts bins codes to shorthand description, transforms format from wide to long, long format needed for  
114 post-processor, applies HUC2 a/b split based on species HUC12 crosswalks, updates all species information,  
transform  
115 table with shorthand back to wide format for use as BE attachment