

Section 4: Documenting Data from CAD Projects#

4.2 Project Documentation#

It is important to plan the creation of digital data from the outset of a project. Projects generally begin with the preparation of a project design and it is at this stage that the tasks that are necessary to complete the intended work are planned and resources are allocated. At the design stage, it is recommended practice for project managers to define areas of responsibility for creating digital data including personnel, the acceptable file formats and naming conventions, as well as to identify both back-up and archiving strategies. Project managers are recommended to contact a digital archive at the design stage to check their recommended file formats, documentation requirements or any conditions of deposit so that these can be included in the planning process.

The project design itself forms a part of the project documentation, providing the background to why work took place and why CAD was used. The final report, written after the project's completion, should then describe the project outcomes, how the work was actually done and what was produced. Both documents describe the formats of data that were produced and factors which influenced their collection and later re-use. Both documents should be deposited as part of the project's digital archive.

4.2.1 File List

For each project provide a list of all files that have been produced including:

- File name
- Created date or date of last update
- Copyright
- Data format of the file, i.e. the version number
- Description of content.

It is important to record all known copyright details in each file. In cases where data has been retrospectively captured from another source (such as a map or photograph) there may be a complex trail of ownership of copyright. It makes life easier for everyone if the process of evolution is recorded, particularly as copyright permissions may be limited for some datasets (e.g. it may be permissible to use a map for research but not for publication). When preparing a CAD model for deposit in a digital archive, it is recommended practice to link any copyright-restricted datasets as external reference files rather than embedding them within a CAD model.

4.2.2 Project Level Documentation

As described in the general [Project Documentation](#) and [Project Metadata](#) sections of these guides, project level documentation provides summary information about the project for others. This information is often used to provide an index for resource discovery to support the retrieval of project reports and associated data files. The following information should be collected:

| Element | Description |
|---------------------|--|
| Project Title | The project name or title may be the name that is used in the written report (e.g 'The Athens Propylaea project') or a familiar/published place or monument name (e.g. 'Symon's Castle') |
| Project Description | A brief summary (200-300 words) of the main aims and objectives of the project including |

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| | a description of the work flow, data collection processes, personnel, with specific notes regarding successful or problematic portions of the work |
| Subject | A brief description of the subject being recorded, i.e. the monument or structure surveyed. Use of a controlled vocabulary (e.g. the Thesaurus of Monument Types) is recommended to achieve consistency in terminology. |
| Project Keywords | Keywords indexing the subject of the project. They can be drawn from the index fields listed below (e.g. survey type, capture method, monument type, etc.) with reference to appropriate terminology standards. |
| Language | E.g. English |
| Site Address | The postal address of the subject being recorded (if any). |
| Administrative area | In the United Kingdom record the District/County/Unitary Authority in which the subject lies (in the United States this record will be the Town/County/State). The administrative boundaries that are current at the time of the survey should be used and, for consistency, the use of the standard names from Appendix 4 is recommended. |
| Country | The country in which the study area lies (England, Scotland and Wales should be recorded separately). |
| Spatial Coverage | The map coordinates of the SW and NE corner of a bounding box enclosing the study area. For Britain, Ordnance Survey National Grid coordinates are recommended. It should be noted that the Ordnance Survey of Great Britain (OS) holds copyright over the reproduction of OS maps and retains Intellectual Property Rights in all information derived from such maps. |
| Size | The size of the study area. |
| Originator | The name, address and role of the organisation or individual(s) responsible for the project. |
| Client | The name and address of the organisation or individual(s) who sponsored or commissioned the project. |
| Depositor | The name, address and role of the organisation or individual(s) depositing data from the project. |
| Contributor | The name and address of the person(s) or organisation who deposited the data file. |
| Identifier / Reference Number | The project reference number or code used by the organisation responsible to refer to the project or to the data |
| Duration | The dates when the project took place, i.e. the dates of the first and last day on which the fieldwork took place. If separate periods of fieldwork are related to the same project they should be listed individually. |

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| Copyright | A description of any known copyrights associated with the digital collection. |
| Primary Archive | The name, address and role of the organisation or individual(s) holding primary data from the project. |
| Source / Related Archives | References to the original material for any data derived in whole or in part from published or unpublished sources, whether printed or machine-readable. Details should be given of where the sources are held and how they are identified there (e.g. by accession number). If a CAD model is derived from other sources it should be indicated whether the data represent a complete or partial transcription/copy, and the methodology used for their computerisation. |
| Bibliography | The title, author, date and publisher of any report(s) or publication(s) about the project |
| Format | A Brief description of the format of the data file, e.g. DWG and DXF files. |

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