Kestrel Help v1017

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About This Help

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Kestrel version 1.0.17

Kestrel Help 2010-03-15

Tutorial

- Log In
- Create New Observation
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  - Create New Location
    - Use Mapping Tools
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- Edit Observation that you created
- Export Observations
- Create New Survey
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  - Import Observations from Geodatabase Recordset
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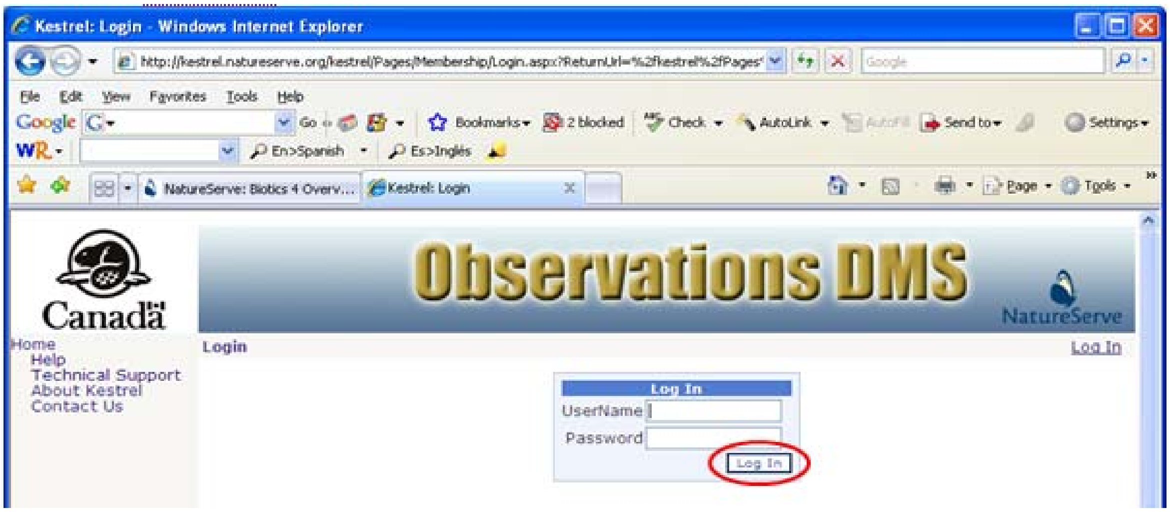
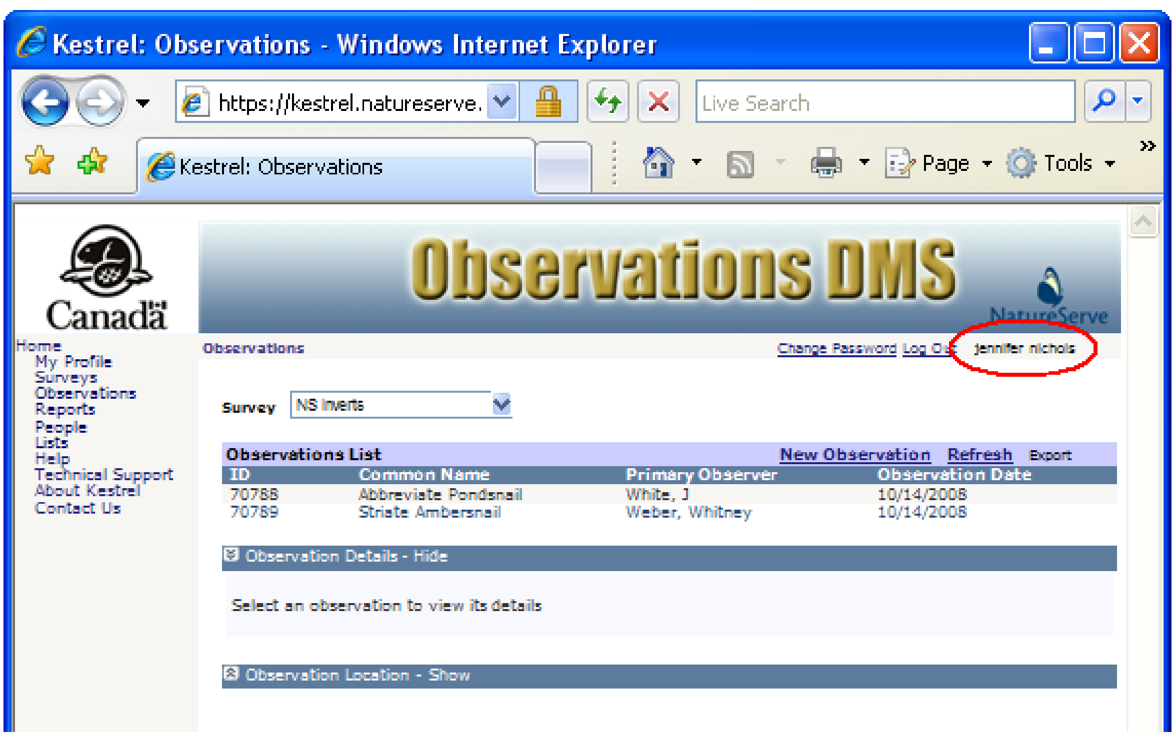
Log In

In order to login to Kestrel, the person must have a User Account.

1. Enter your UserName and Password in the appropriate text boxes and click **Log In**.



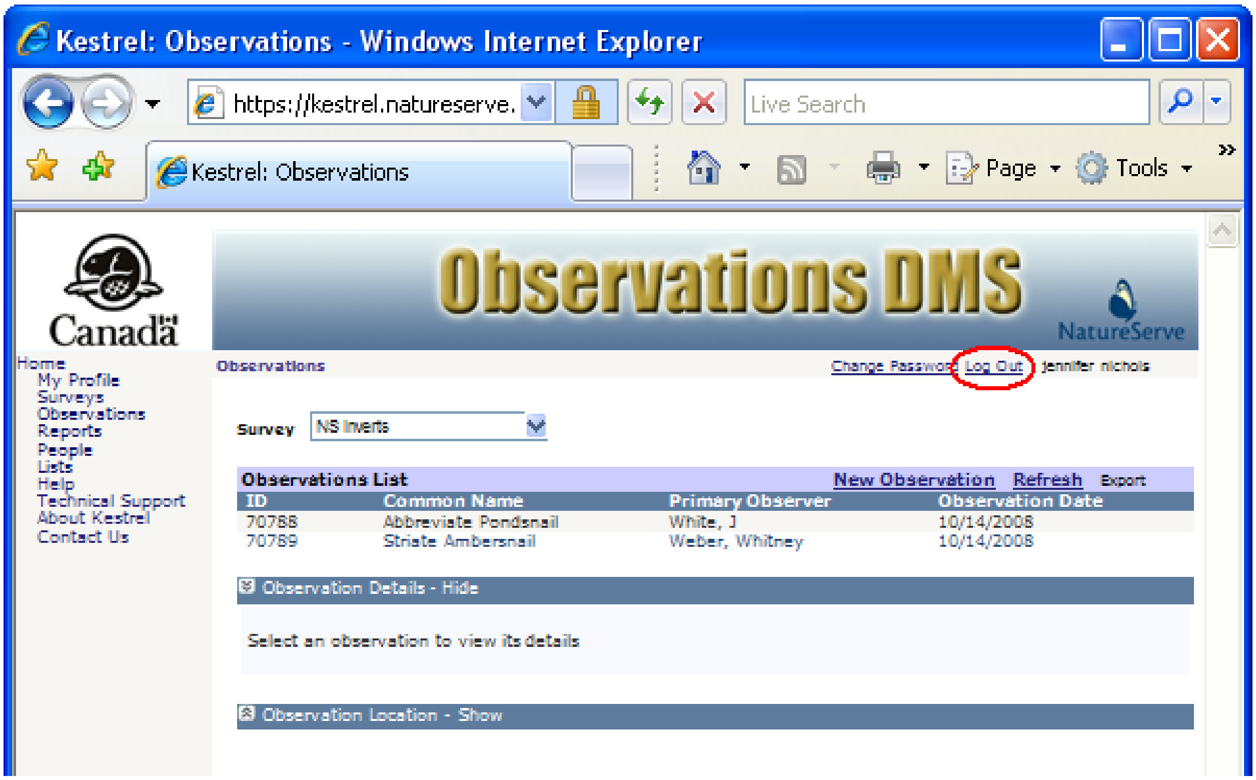
2. The application will open to a list of observations associated with the first survey listed in the Survey dropdown box. The UserName will be shown in the right hand corner next to the options to **Change Password** and **Log Out**.



Related Tasks:

Log Out

The user can Log Out from any page within the application by clicking **Log Out**, found in the upper right hand corner.



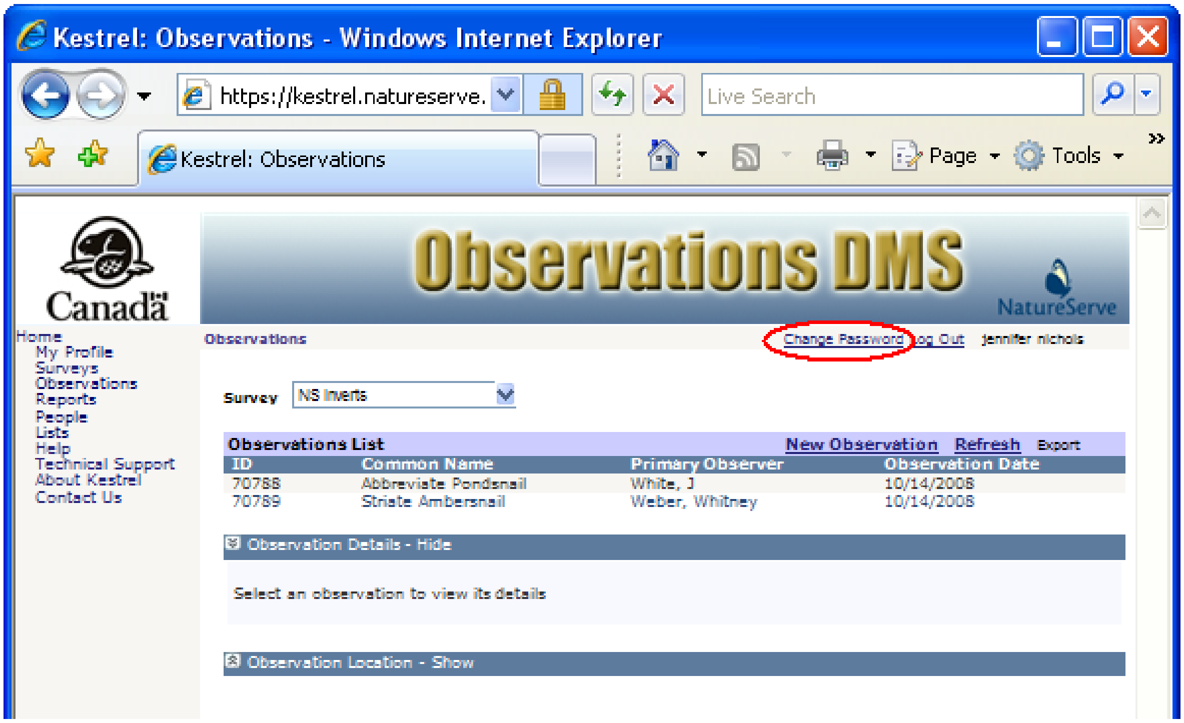
Related Tasks:

- Log In
- Change Password

Change Password

The user can change their password from any page within the application.

1. Click **Change Password** in the upper right hand corner of a page.



2. Enter the new Password in both the **New Password** and **Confirm New Password** fields.
3. Click **Save & Close** to finalize the new password, or **Cancel** to cancel the new password and retain the original pre-existing password for use.

Related Tasks:

- Log In
- Log Out

My Profile

Introduction to My Profile

The user can set default preferences for species name format and language on this webpage.

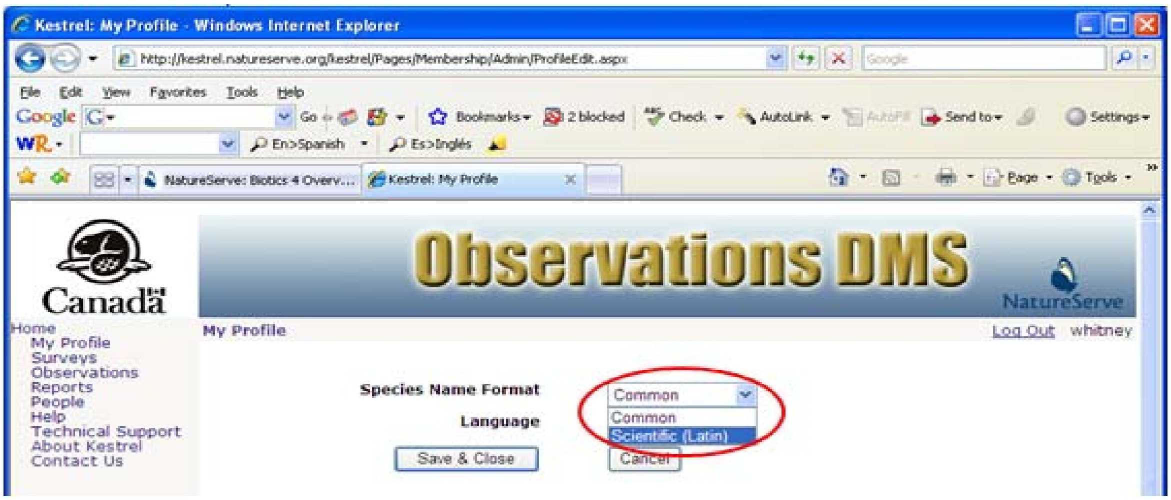
Tasks:

- Set Species Name Format
- Set Language Preference
- Set Survey Preference

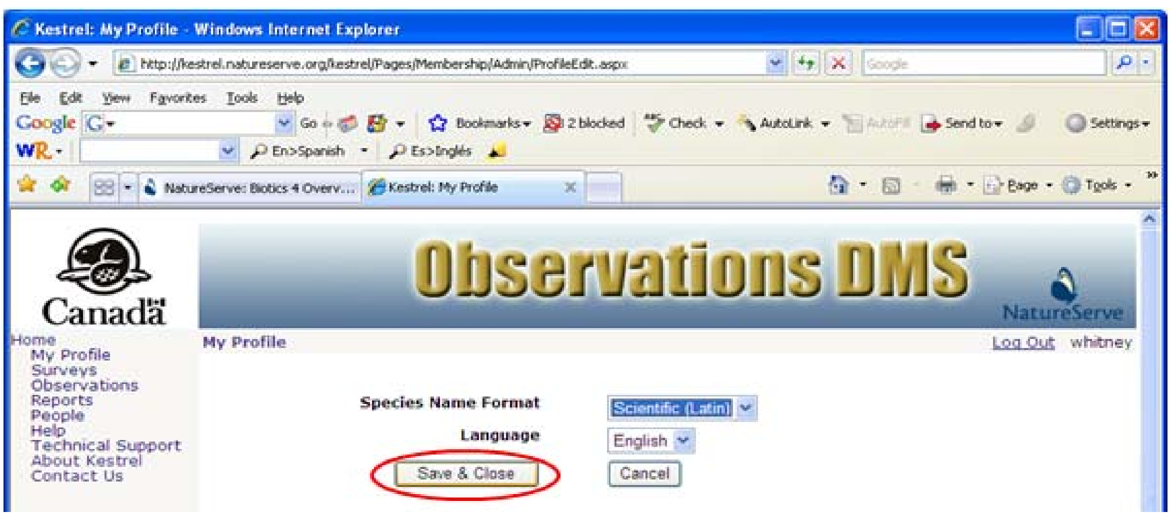
Tasks

Set Species Name Format

1. Within the My Profile page, select either **Common** or **Scientific (Latin)** from the Species Name Format dropdown list.



2. **Save & Close** to save your preferences.

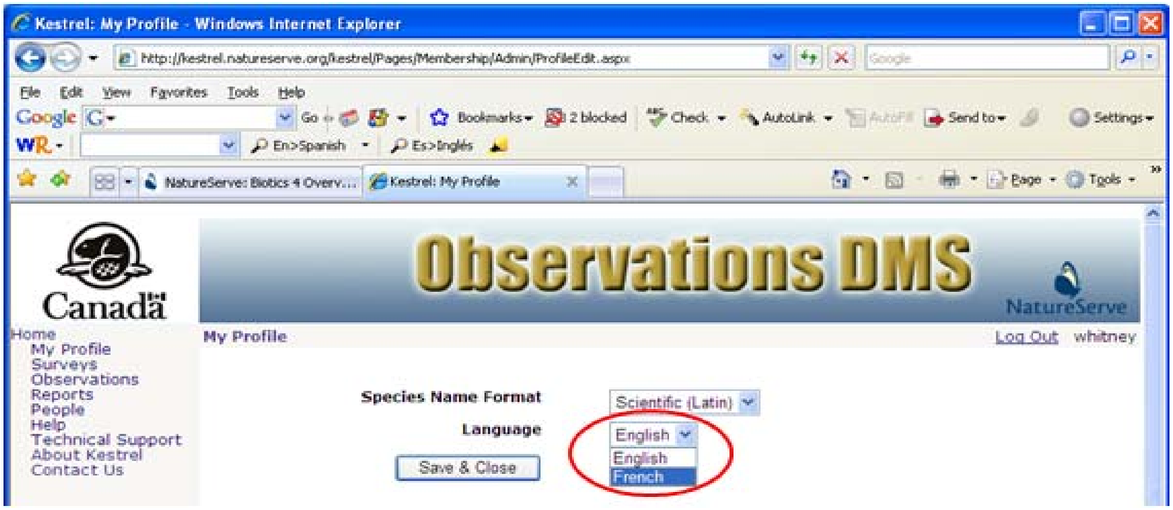


Related Tasks:

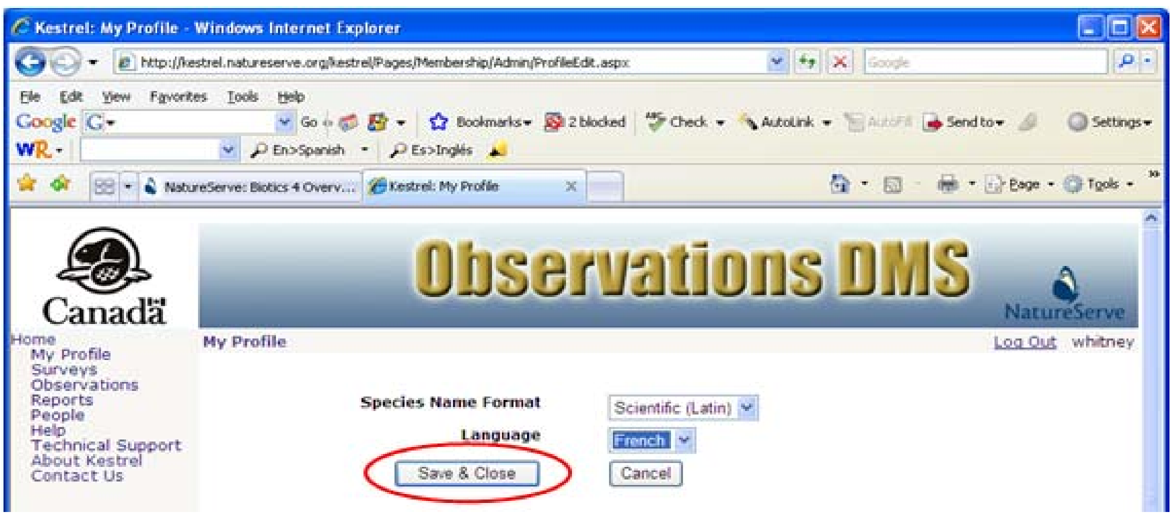
- Set Language Preference
- Set Survey Preference

Set Language Preference

1. Within the *My Profile* page, select either **English** or **French** from the Language dropdown list.



2. **Save & Close** to save your preferences.



Related Tasks:

- Set Species Name Format
- Set Survey Preference

Set Survey Preference

1. Within the *My Profile* page, indicate if you would like to see ALL surveys by default in the *Surveys* page. If this selection is not indicated, only those surveys to which you have been granted privileges will be shown.

2. **Save & Close** to save your preferences.

Related Tasks:

- Set Species Name Format
- Set Language Preference

Surveys

Introduction to Surveys

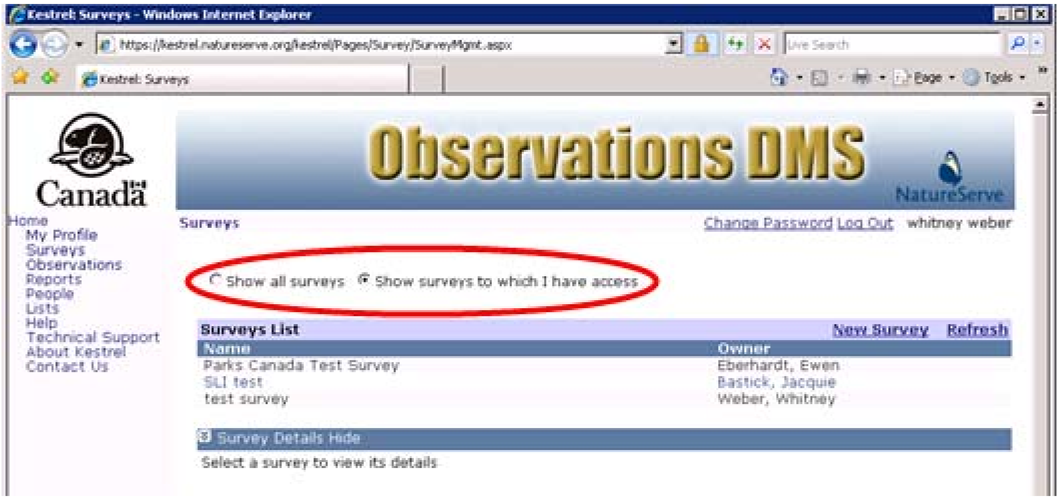
Tasks:

- Log In
- Create New Survey
- View Survey
- Edit Survey
- Delete Survey
- Manage Observations
- Configure Survey Options
- Download Processed Spreadsheet
- Import Observations from Spreadsheet
- Download Spreadsheet Template
- Download Geodatabase Template
- Import Observations from Geodatabase Recordset
- Download Processed Geodatabase XML Workset
- Select Survey Owner
- Add Authorized User
- Remove Authorized User

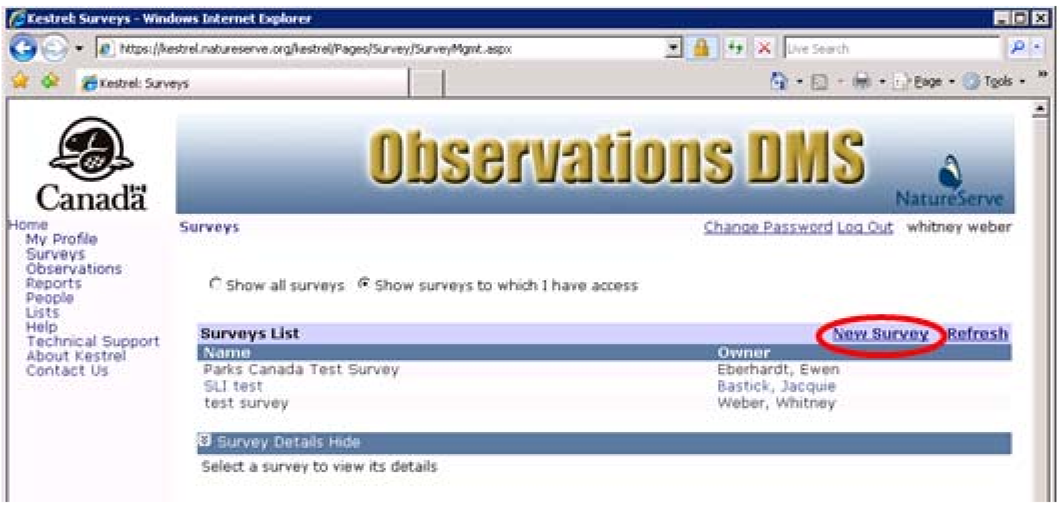
Methods of Navigation:

There are a number of ways to navigate through the *Surveys* page:

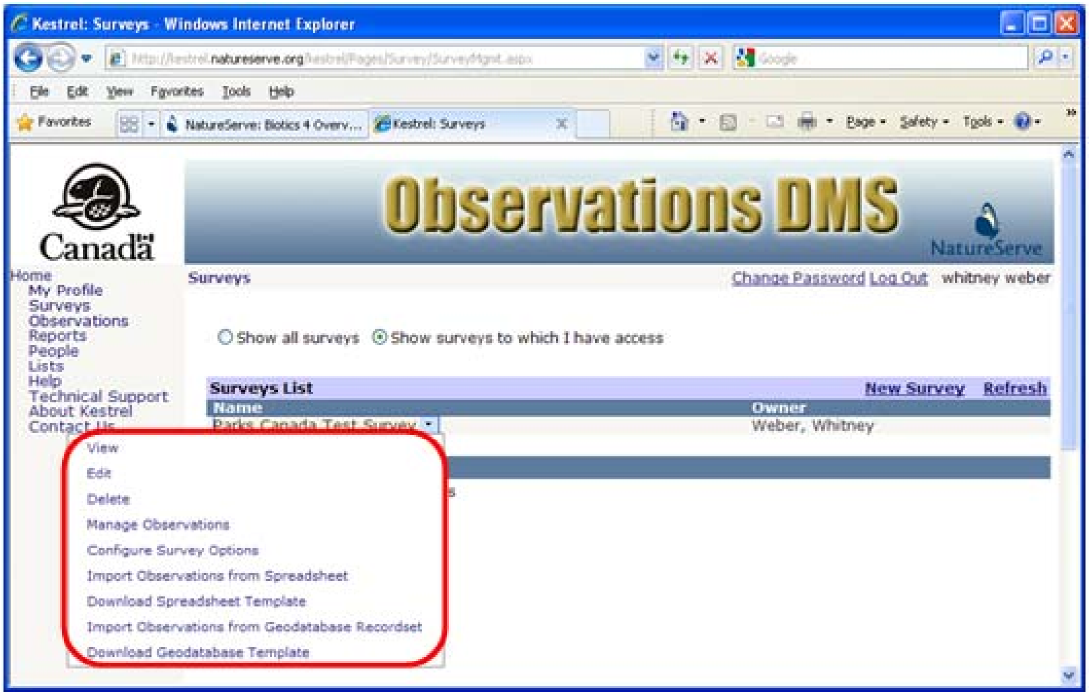
- Whether all surveys are displayed by default within the *Surveys* page, or just those to which you have been granted privileges, depends on your Survey Preference within *My Profile*. Click the **Show all surveys** radio button to see all surveys or **Show surveys to which I have access** to filter out surveys to which you lack privileges.



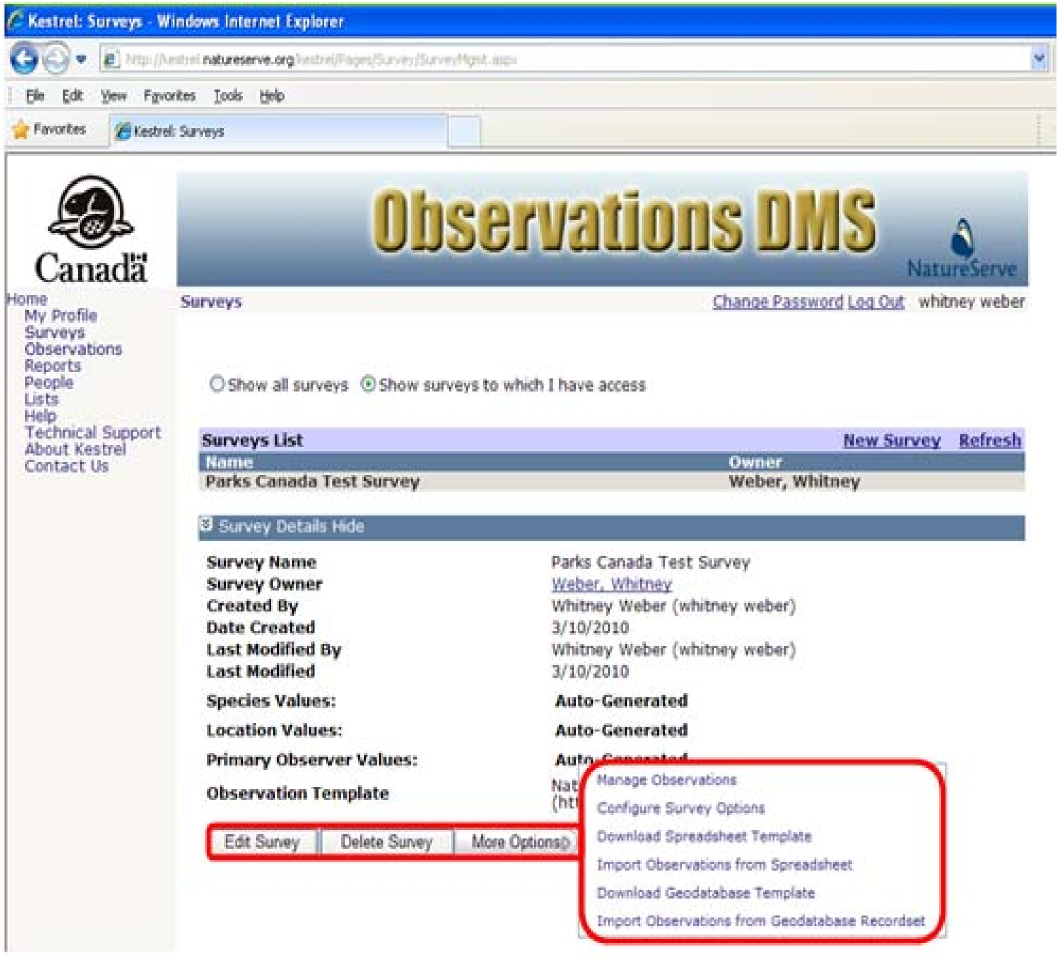
- Create a new survey by clicking on the **New Survey** button.



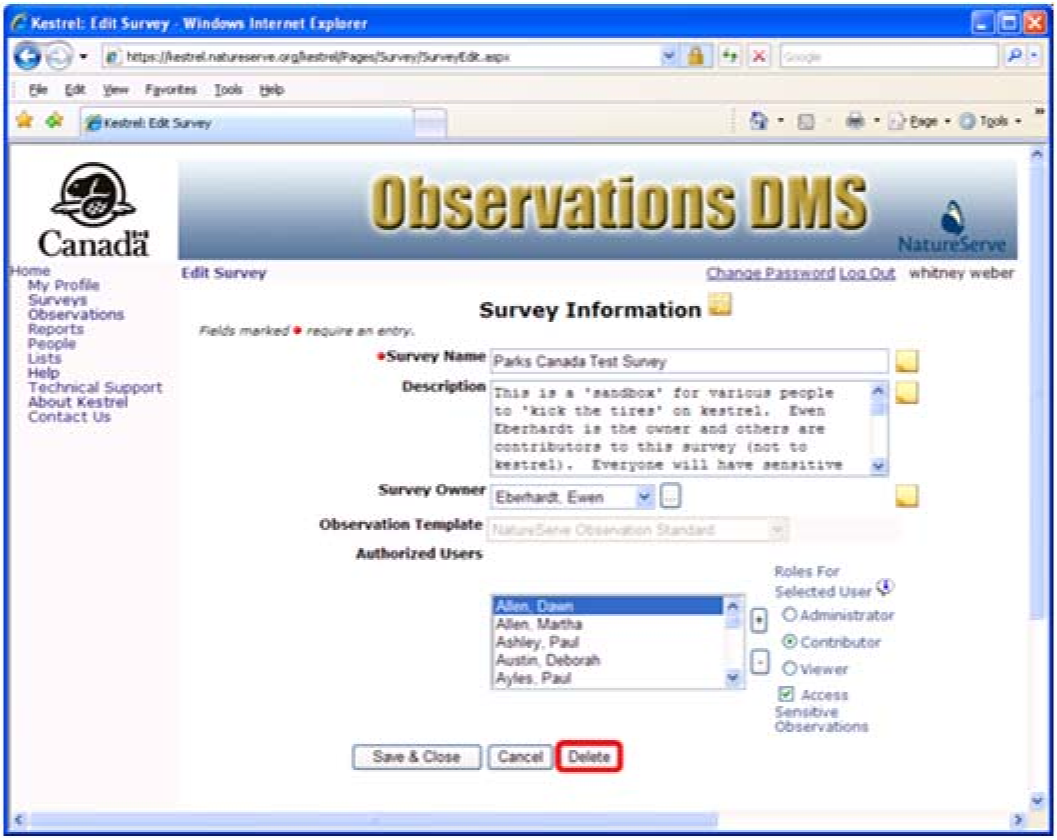
- Click on a survey name and from the dropdown list choose to **View**, **Edit**, or **Delete** the survey, **Manage Observations**, **Configure Survey Options, Import Observations from Spreadsheet, Download Spreadsheet Template, Import Observations from Geodatabase Recordset,** or **Download Geodatabase Template**.



- Alternatively, **View** the survey, from which point you can **Edit** or **Delete** the survey, as well as **Manage Observations, Configure Survey Options, Download Spreadsheet Template, Import Observations from Spreadsheet, Download Geodatabase Template,** or **Import Observations from Geodatabase Recordset**.



- The survey can also be **Deleted** from within the *Edit Survey* page.


Kestrel: Edit Survey - Windows Internet Explorer
Observations DMS
Canada
NatureServe
Home
My Profile
Surveys
Observations
Reports
People
Lists
Help
Technical Support
About Kestrel
Contact Us
Edit Survey
Change Password
Log Out
whitney weber
Survey Information
Fields marked • require an entry.
•Survey Name
Parks Canada Test Survey
Description
This is a 'sandbox' for various people to 'kick the tires' on kestrel. Ewen Eberhardt is the owner and others are contributors to this survey (not to kestrel). Everyone will have sensitive
Survey Owner
Eberhardt, Ewen
Observation Template
Authorized Users
Roles For Selected User
Administrator
Contributor
Viewer
Access Sensitive Observations
Allen, Dawn
Allen, Martha
Ashley, Paul
Austin, Deborah
Ayles, Paul
Save & Close
Cancel
Delete

Survey Attributes

The following fields are attributes of a survey:

- Survey Name
- Description
- Survey Owner
- Observation Template
- Authorized Users
- Roles for Selected User
- Access Sensitive Observations

Survey Name

Unique name that identifies the survey.

The Survey Name is also shown in the **Survey** field, as seen on the *Observation Edit* page, but it is not editable there; it merely indicates the survey to which the observation record belongs. The Survey (Name) must be defined within the *Survey Edit* page.

Related Tasks:

- Edit Survey

Page: Edit Survey
Field: Survey Name
    Database Table: SURVEY
        Column: name_s
        AttributeDefinition_ID:
        Data Type: VARCHAR2(4000)
        Optionality: NOT NULL
        Default Value:
        Column linking to Parent Table:
    Foreign Key from:
        Column Name:
        Display Column:

Description

Description of the survey.

Page: Edit Survey
Field: Description
    Database Table: SURVEY
        Column: surveydescription_l
        AttributeDefinition_ID:
        Data Type: VARCHAR2(4000)
        Optionality: NULL
        Default Value:
        Column linking to Parent Table:
    Foreign Key from:
        Column Name:
        Display Column:

Survey Owner

Name of the person with responsibility for the data collected in the survey.

Related Tasks:

- Select Survey Owner

Page: Edit Survey
Field: Survey Owner
    Database Table: SURVEY
        Column: owner_person_x
        AttributeDefinition_ID:
        Data Type: NUMBER
        Optionality: NULL
        Default Value:
        Column linking to Parent Table: owner_person_x
    Foreign Key from: PERSON
        Column Name: person_id
        Display Column:

Observation Template

Template from which the survey will be built. The fields applicable to all observations contained within a survey are defined within the observation template.

The **Template** field seen within the *Observation Edit* page is not editable there, as it is defined according to the survey to which the observation record belongs. The (Observation) Template must be defined within the *Survey Edit* page.

Related Tasks:

- Edit Survey
- Create New Template
- View Template
- Edit Template
- Delete Template
- Manage Surveys

Page: Edit Survey
Field: Observation Template
Database Table: SURVEY
Column: entitydefinition_id
AttributeDefinition_ID:
Data Type: NUMBER
Optionality: NOT NULL
Default Value:
Column linking to Parent Table: entitydefinition_id
Foreign Key from: ENTITYDEFINITION
Column Name: entitydefinition_id
Display Column: entitydefinition_xml

Authorized Users

Users who will be given access to the observations within the survey.

Related Fields:

- Roles for Selected User
- Access Sensitive Observations

Related Tasks:

- Add Authorized User
- Remove Authorized User
- Create User Account

Page: Edit Survey
Field: Authorized Users
Database Table: SURVEY_USER_ROLES
Column: user_id
AttributeDefinition_ID:
Data Type: VARCHAR2(4000)
Optionality: NOT NULL
Default Value:
Column linking to Parent Table: user_id
Foreign Key from: K_USER *(if a local user; not recorded within database if Active Directory user)*
Column Name: user_id
Display Column: firstname & lastname

Roles for Selected User

Radio button indicates the privileges the selected user is granted in regards to the survey and observation records contained within the survey. Neither the survey nor its observations will be visible or queryable to any user not added to the survey.

- Administrator
  - authority to edit and delete the survey;
  - authority to create, edit, and delete observation records contained in the survey;
  - authority to report on and export observation records contained in the survey;
- Contributor
  - authority to create, edit, and delete observation records contained in the survey;
  - authority to report on and export observation records contained in the survey;
- Viewer
  - authority to view observation records contained in the survey;
  - authority to report on and export observation records contained in the survey;

Related Fields:

- Authorized Users

Page: Edit Survey
Field: Roles for Selected User
Database Table: SURVEY_USER_ROLES
Column: role
AttributeDefinition_ID:
Data Type: VARCHAR2(50)
Optionality: NOT NULL
Default Value:
Column linking to Parent Table:
Foreign Key from:
Column Name:
Display Column:

Access Sensitive Observations

Checkbox which indicates whether the selected user is granted access to sensitive observations within the survey.

Related Fields:

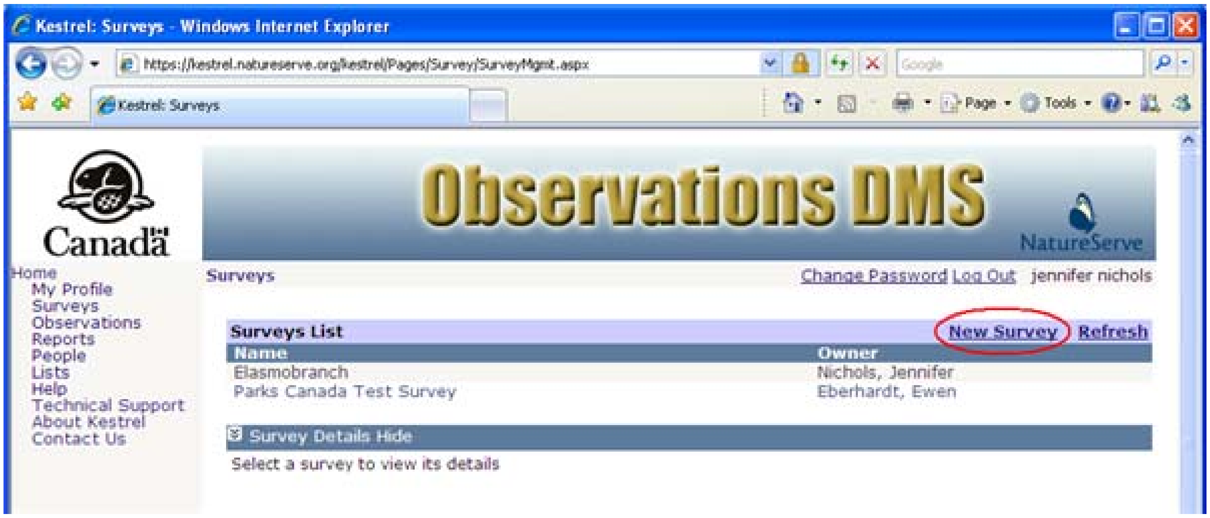
- Authorized Users

Page: Edit Survey
Field: Access Sensitive Observations
  Database Table: SURVEY_USER_ROLES
    Column: role
    AttributeDefinition_ID:
    Data Type: VARCHAR2(50)
    Optionality: NOT NULL
    Default Value:
    Column linking to Parent Table:
  Foreign Key from:
    Column Name:
    Display Column:

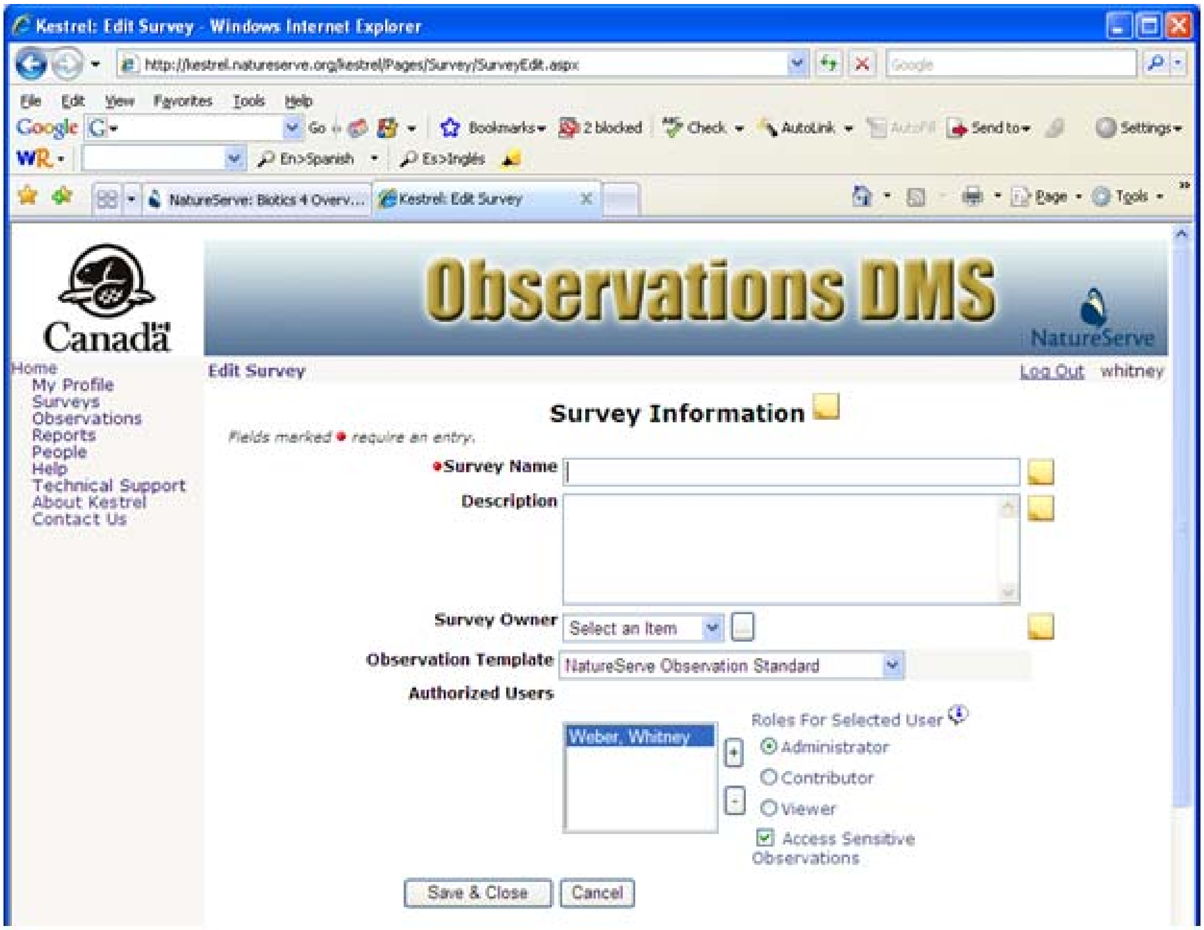
Tasks

Create New Survey

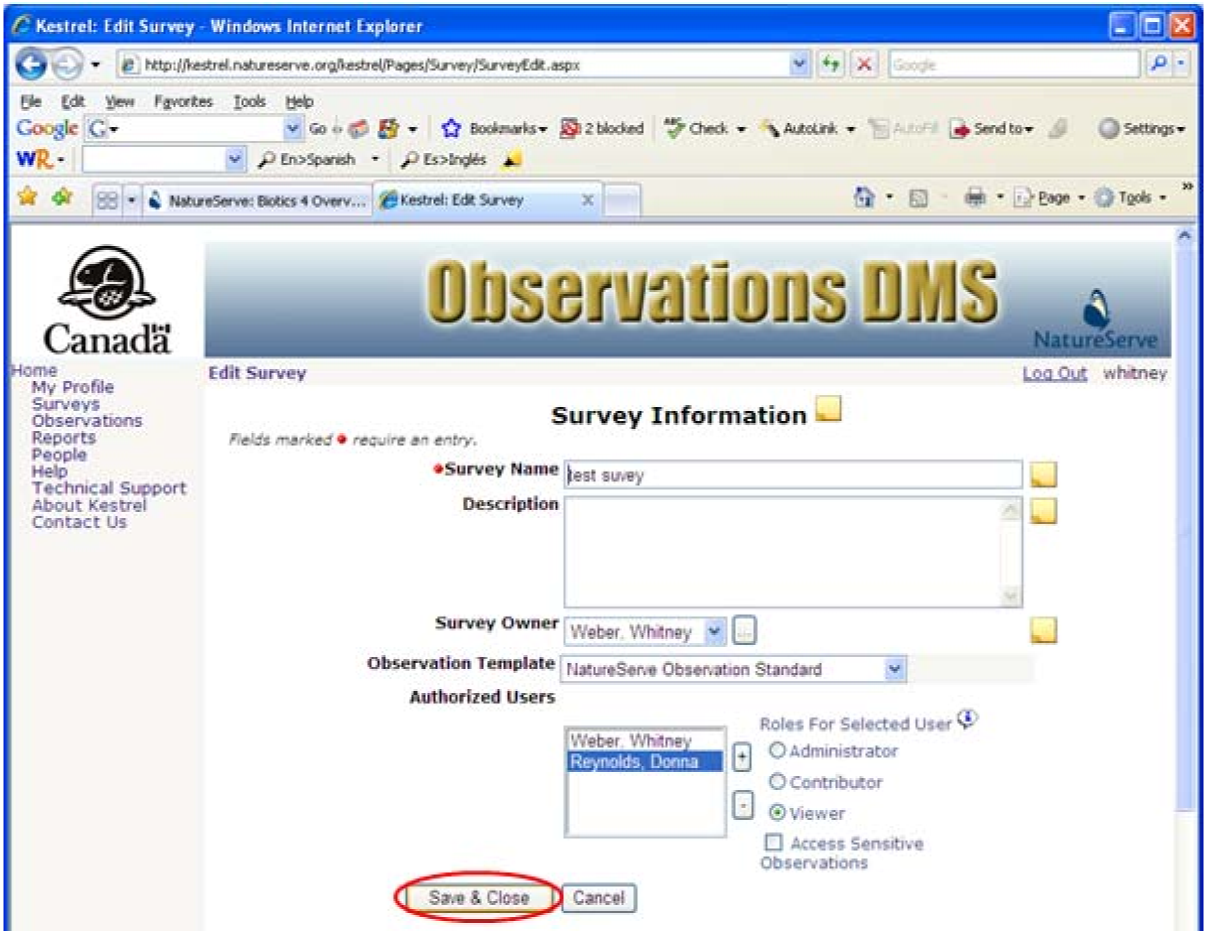
1. Within the *Surveys* page, click the **New Survey** link.



2. Within the *Edit Survey* page, fill out the various fields with appropriate information. For further information on any of the fields, click the appropriate link below.
   - Survey Name - Required
   - Description
   - Survey Owner
   - Observation Template
   - Authorized Users
   - Roles for Selected User
   - Access Sensitive Observations



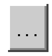
3. **Save & Close** the survey.

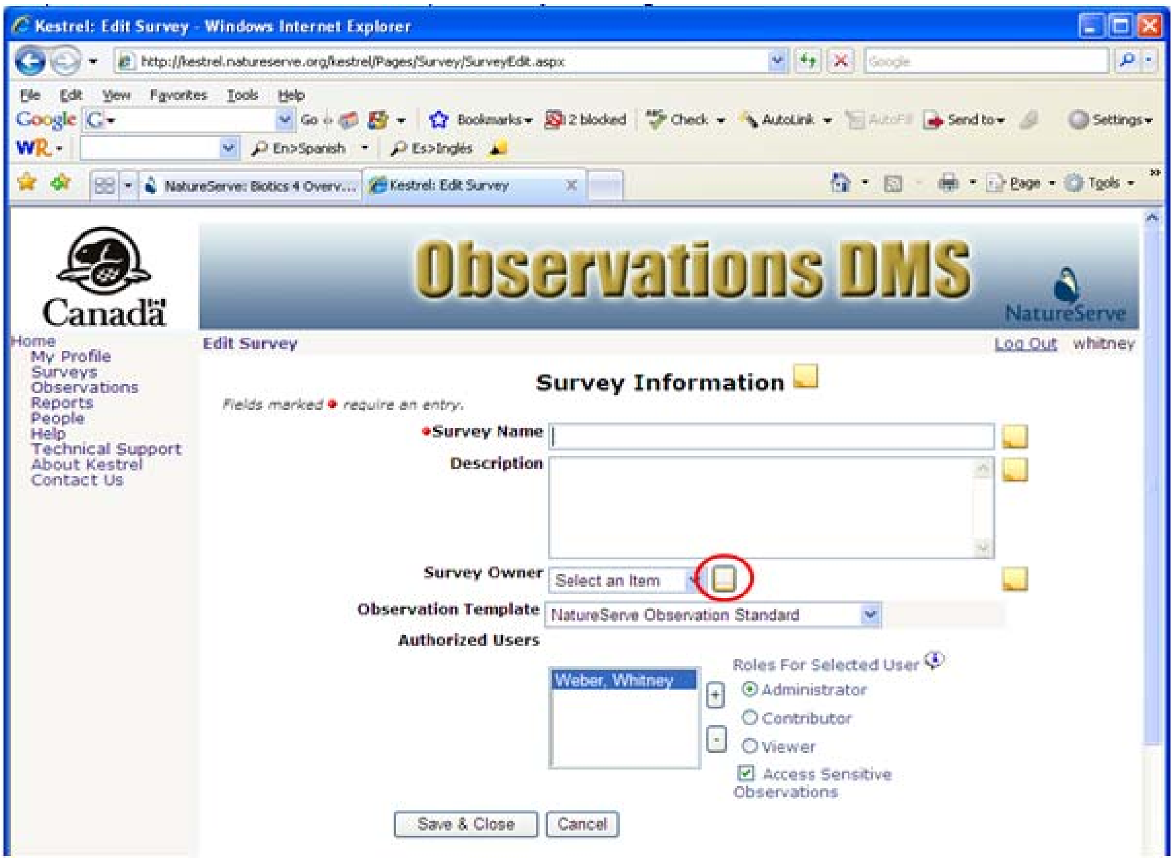


Related Tasks:

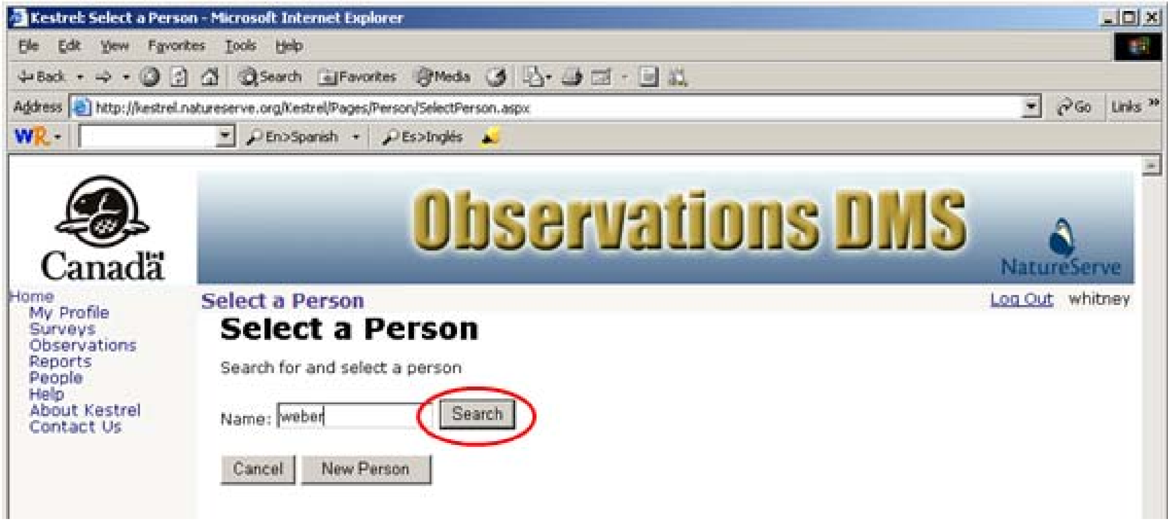
- Select Survey Owner
- Add Authorized User
- Delete Survey
- Manage Observations
- Configure Survey Options
- Download Spreadsheet Template
- Import Observations from Spreadsheet
- Download Geodatabase Template
- Import Observations from Geodatabase Recordset

Select Survey Owner

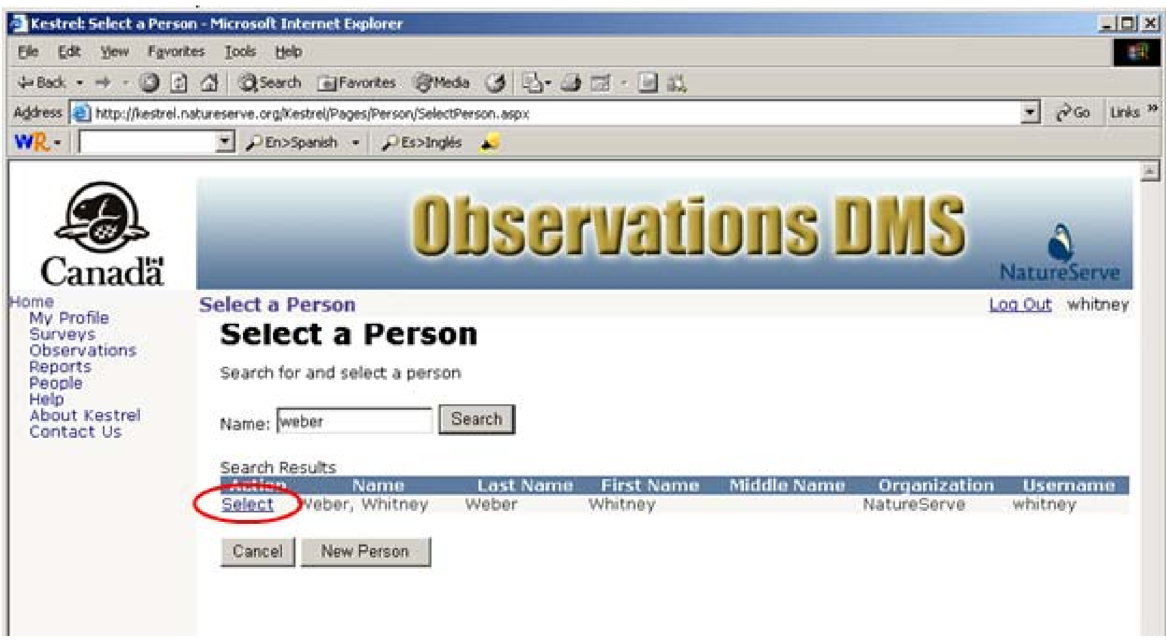
1. Within the *Edit Survey* page, choose from among the names in the **Survey Owner** dropdown list or select a different person by clicking the  button.



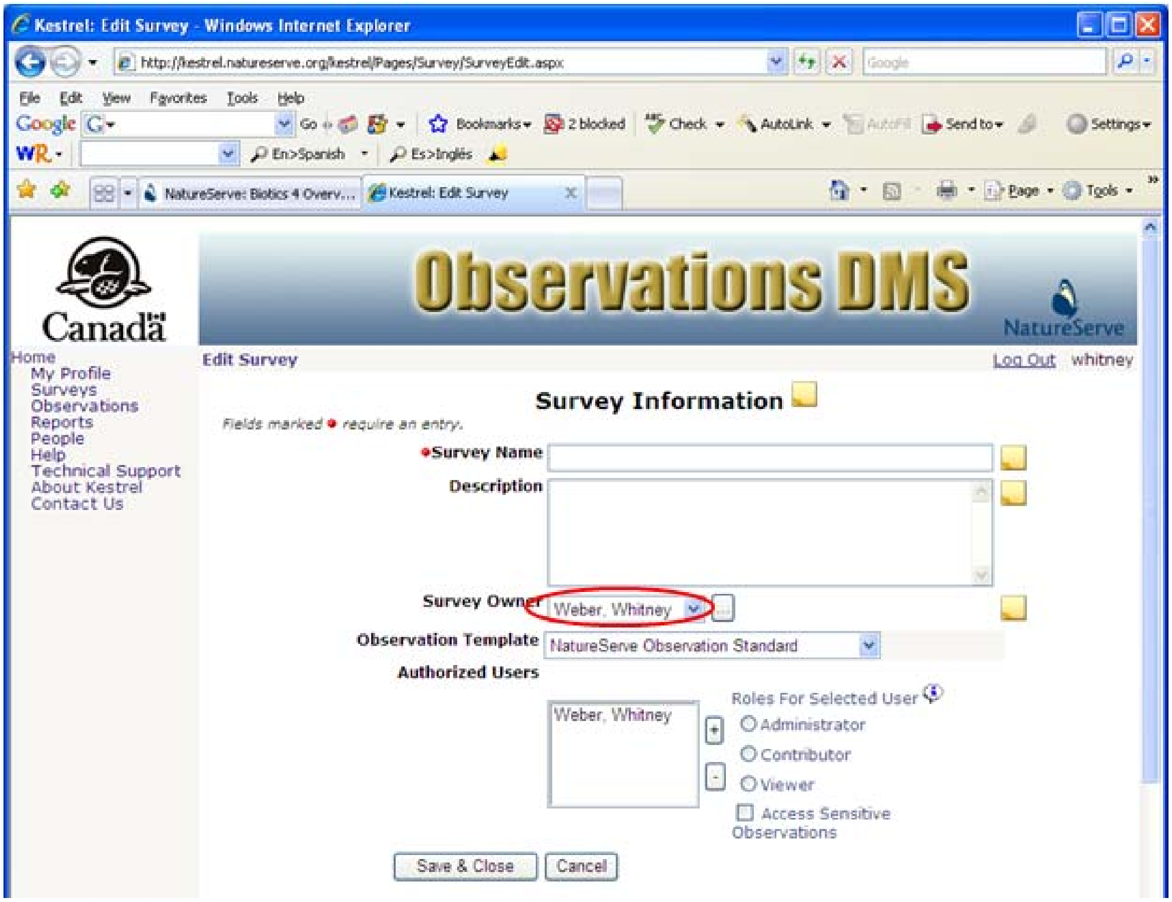
2. Within the Select a Person page, type in the person's name and Search. You may search on any part of the name, but if you search using both a first and last name, they must be entered as *"Last Name, First Name."*



3. Select the desired person or if the person is not currently in the database, click New Person to create a new person record.



4. The **Survey Owner** will be populated with the person you selected.

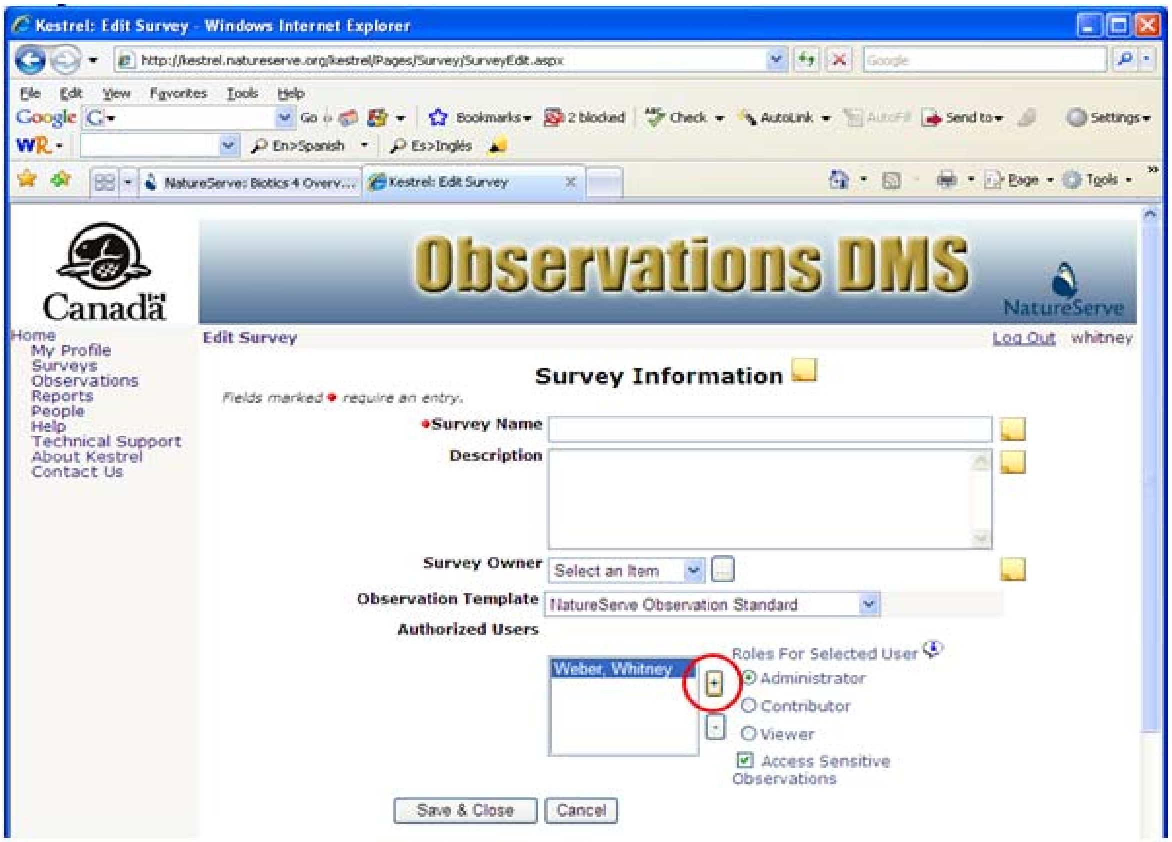


Related Tasks:

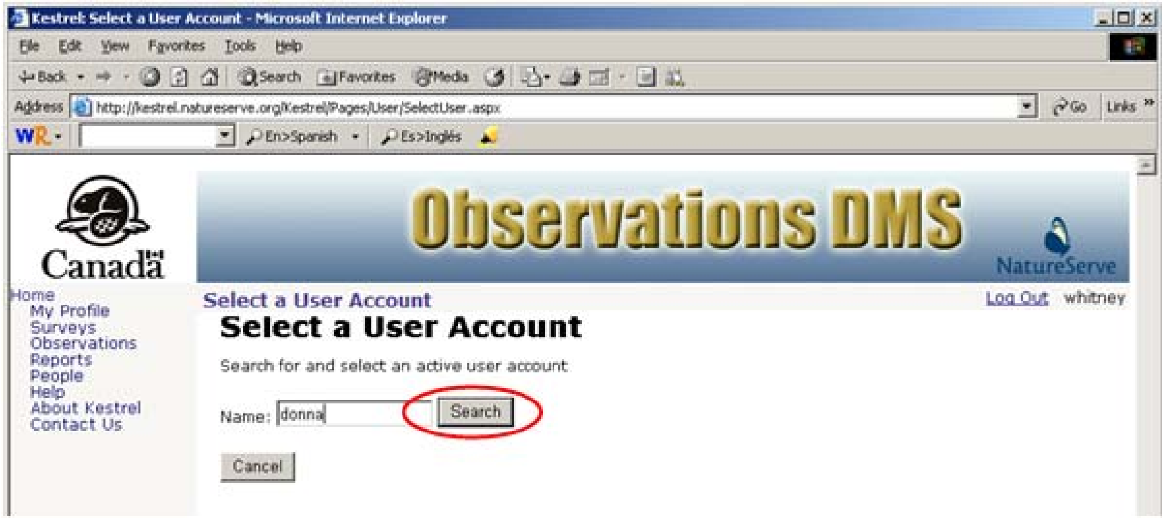
- [Create New Person]()
- [Create New Survey]()
- [Edit Survey]()

Add Authorized User

1. Within the *Edit Survey* page, grant privileges to the survey by adding an Authorized User, using the + button.



2. Within the *Select User* page, enter all or part of the user's first or last names and **Search**. (If you search using both first and last name, they must be entered as *"Last Name, First Name."*)

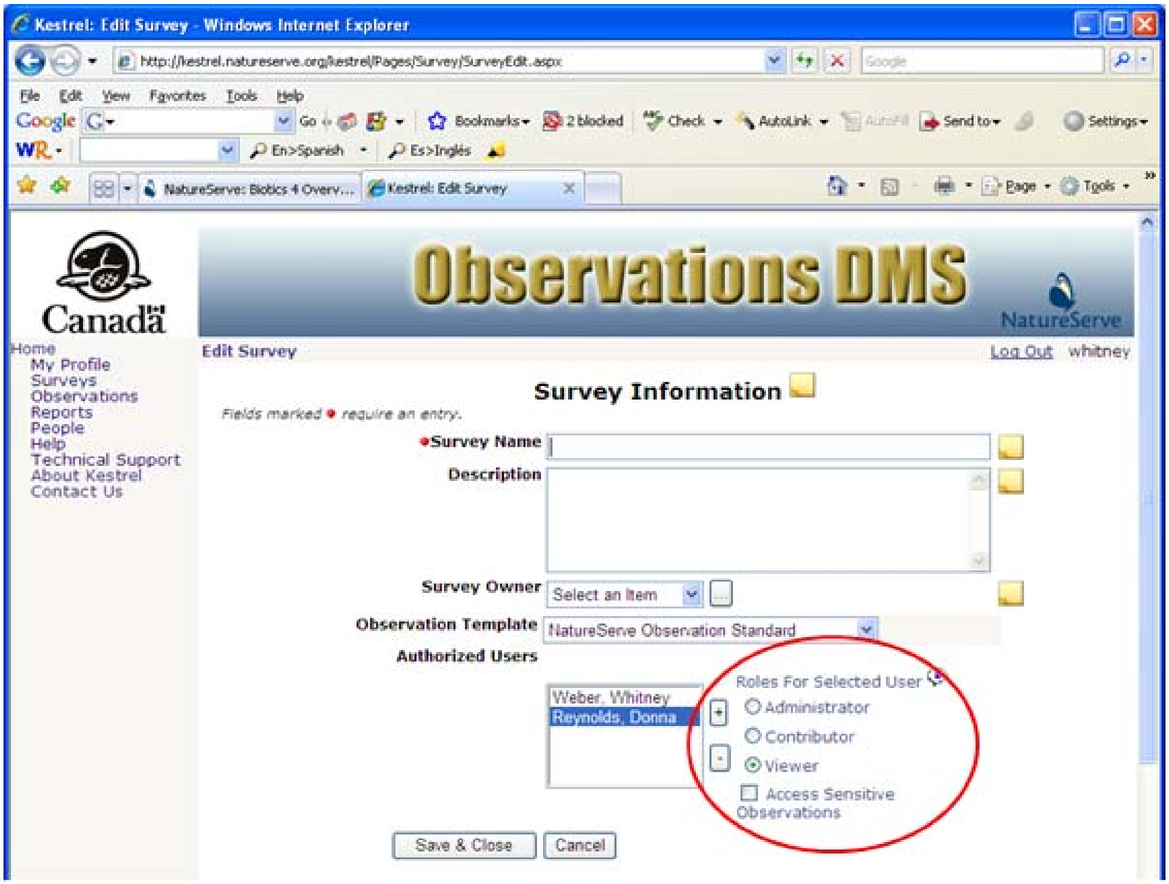


3. **Select** the appropriate user from the Search Results Section.

4. Once the user has been selected, specify the **Role for Selected User** using the associated radio button:

- Administrator
  - authority to edit and delete the survey;
  - authority to create, edit, and delete observation records contained in the survey;
  - authority to report on and export observation records contained in the survey;
- Contributor
  - authority to create, edit, and delete observation records contained in the survey;
  - authority to report on and export observation records contained in the survey;
- Viewer
  - authority to view observation records contained in the survey;

- o authority to report on and export observation records contained in the survey;



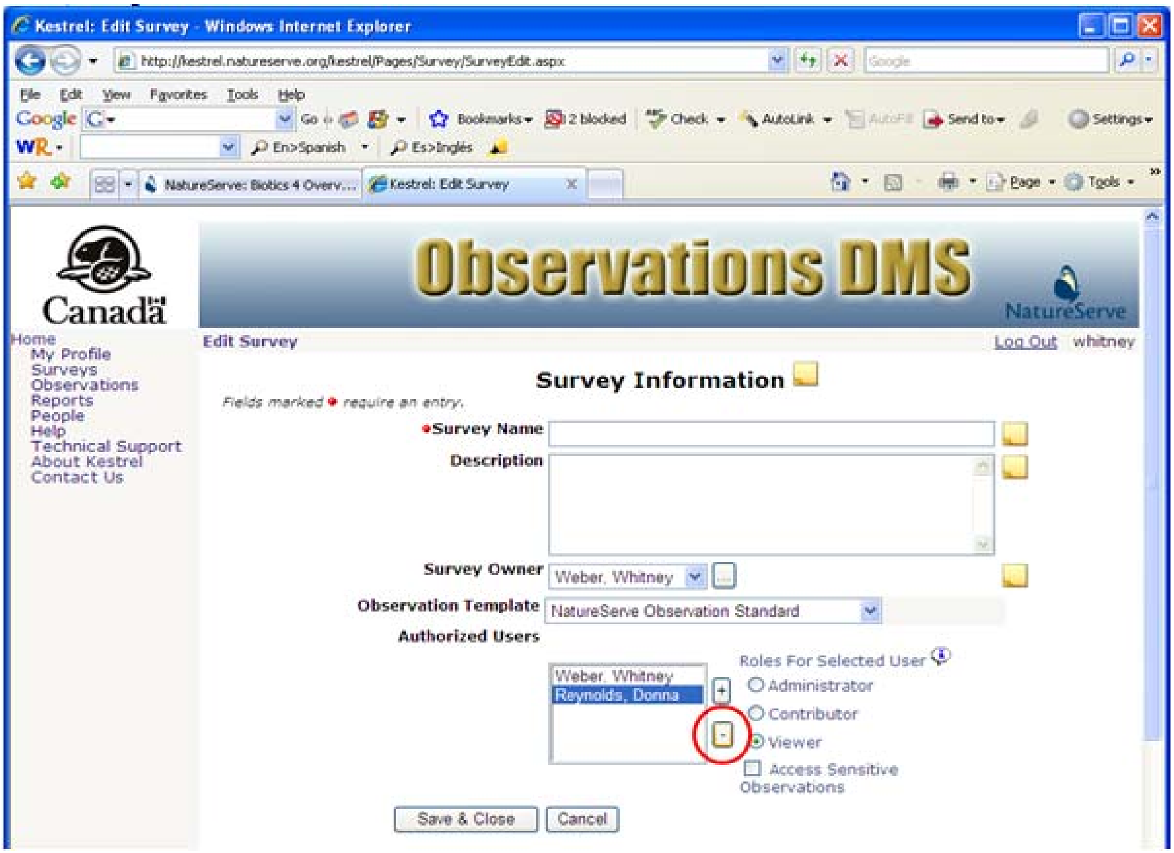
5. If the selected user should be granted access to sensitive observations within the survey, indicate such by checking the **Access Sensitive Observations** checkbox.

Related Tasks:

- Remove Authorized User
- Create New Survey
- Edit Survey

Remove Authorized User

1. Within the *Edit Survey* page, retract privileges to the survey by removing the Authorized User, using the - button.

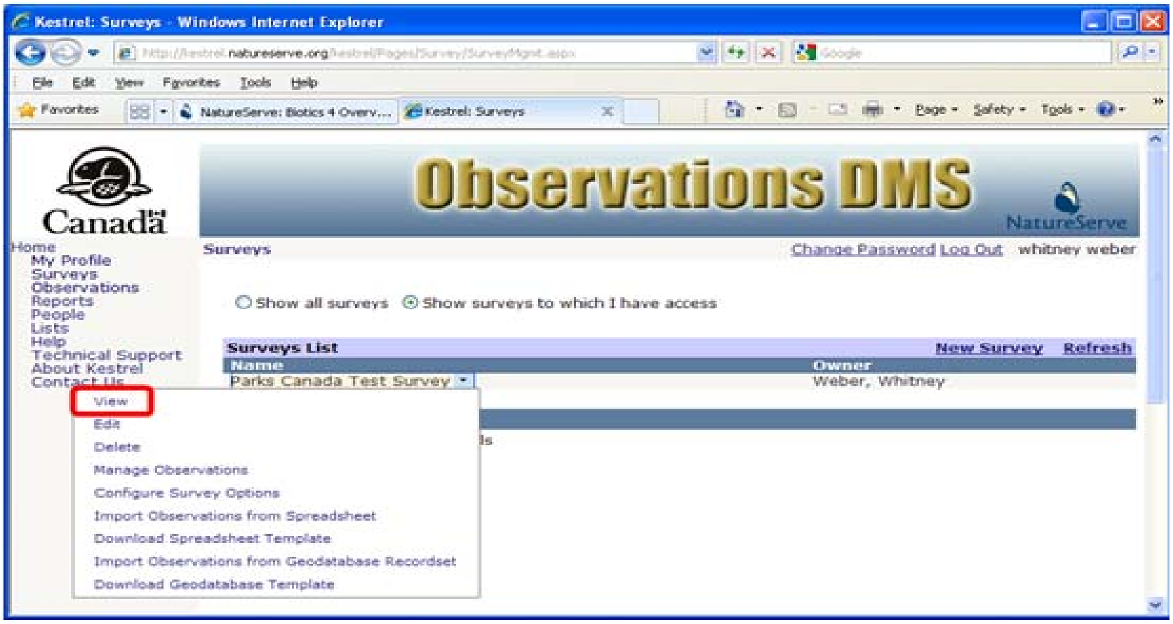


Related Tasks:

- Add Authorized User
- Create New Survey
- Edit Survey

View Survey

1. Within the *Surveys* page, click on the survey and select **View** from the dropdown list.

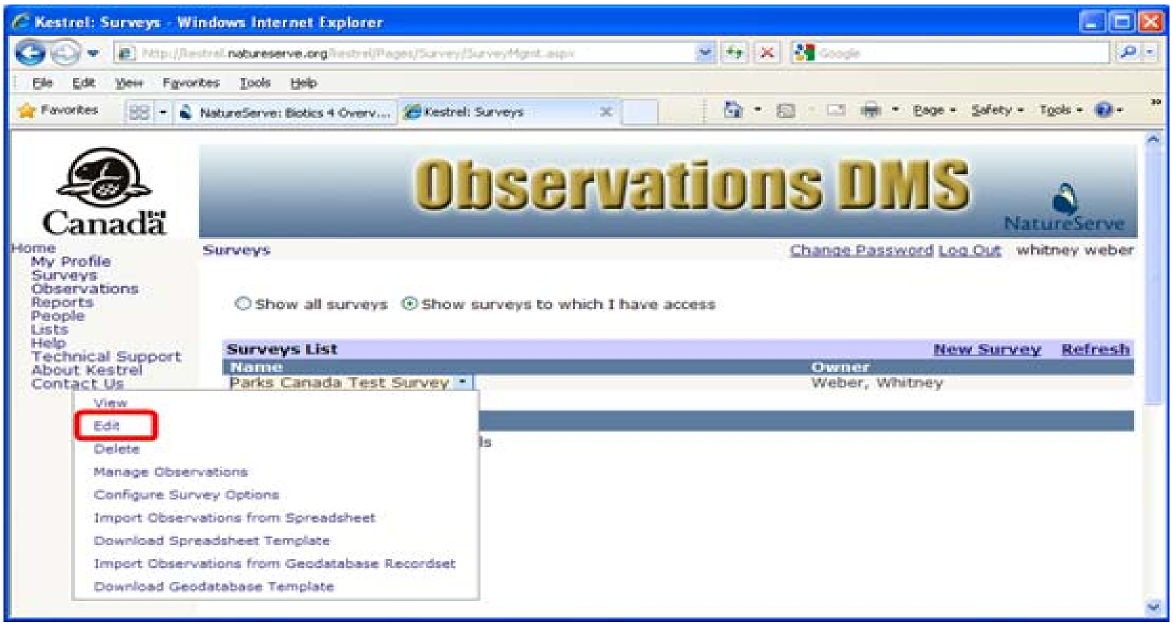


Related Tasks:

- Edit Survey
- Delete Survey
- Manage Observations
- Configure Survey Options
- Download Spreadsheet Template
- Import Observations from Spreadsheet
- Download Geodatabase Template
- Import Observations from Geodatabase Recordset

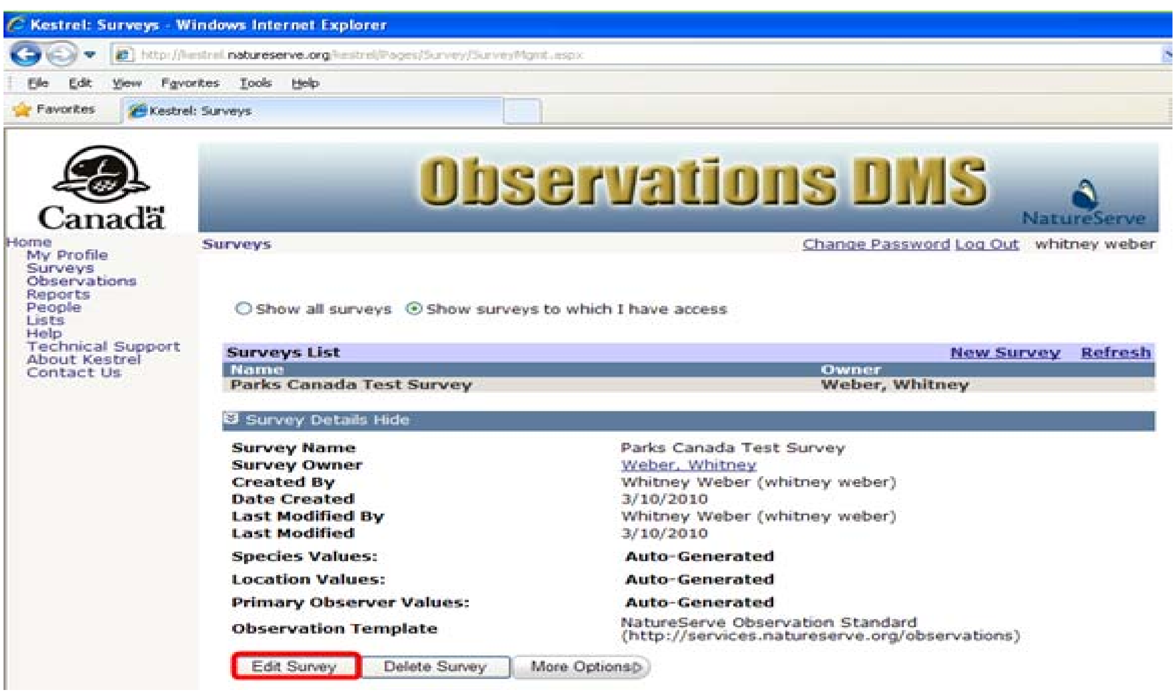
Edit Survey

1. Within the *Surveys* page, click on the survey and select **Edit** from the dropdown list.

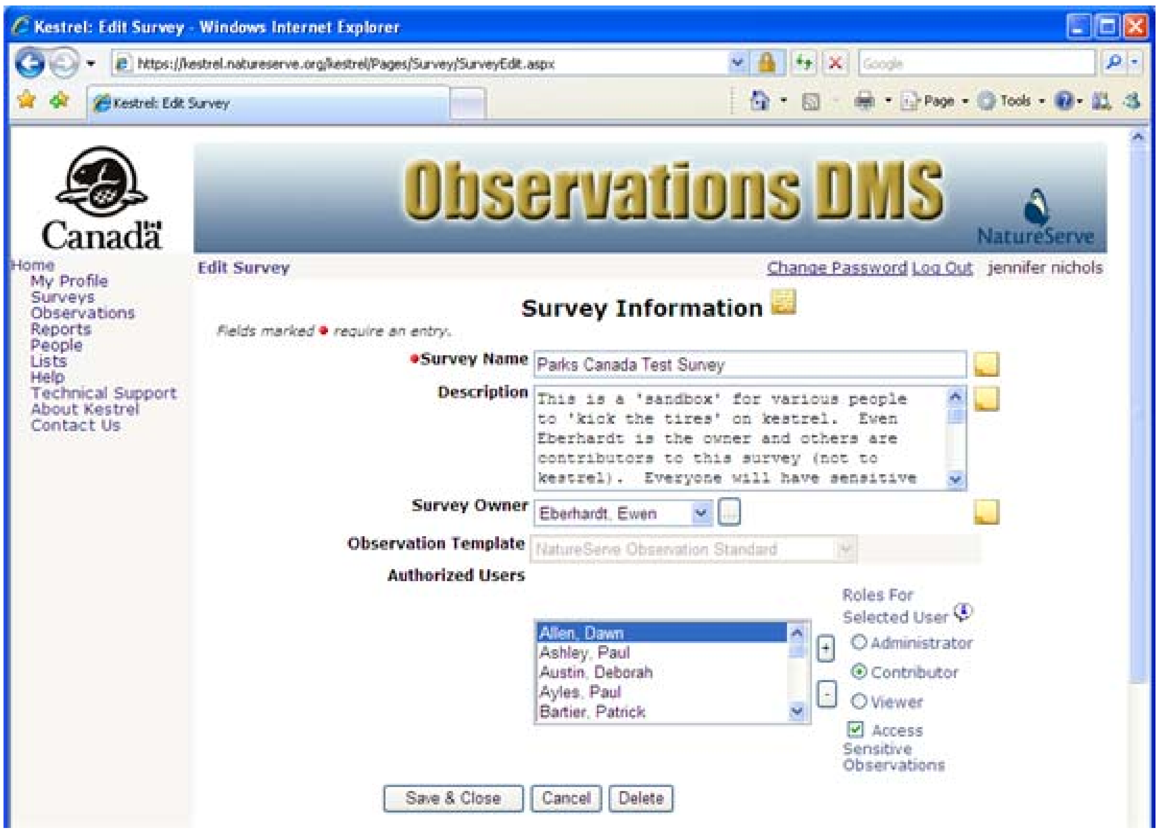


- OR -

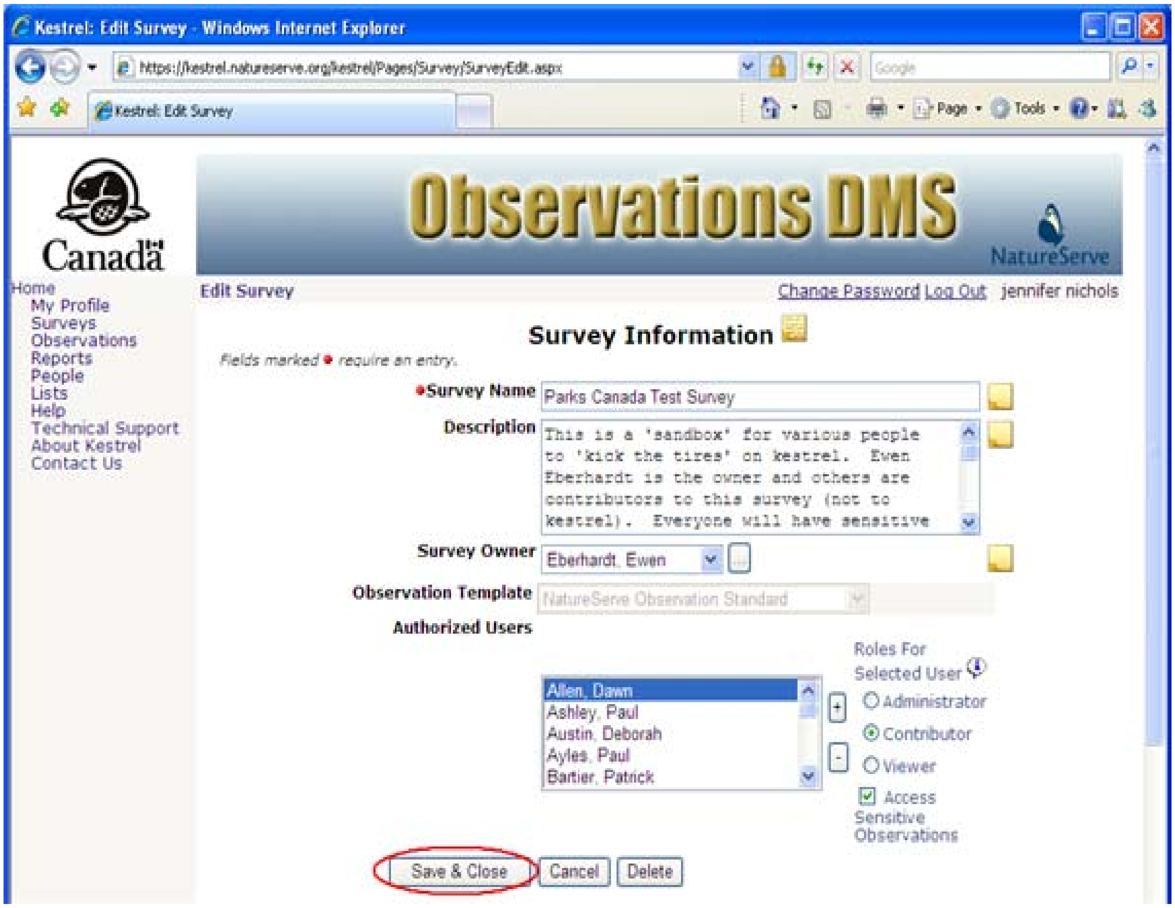
Alternatively, if you have already chosen to **View** the survey, within the Survey Details section select **Edit Survey**.



2. Within the *Edit Survey* page, fill out the various fields with appropriate values. For further information on any of the fields, click the appropriate link below.
   - Survey Name - Required
   - Description
   - Survey Owner
   - Observation Template
   - Authorized Users
   - Roles for Selected User
   - Access Sensitive Observations



3. **Save & Close** the survey.

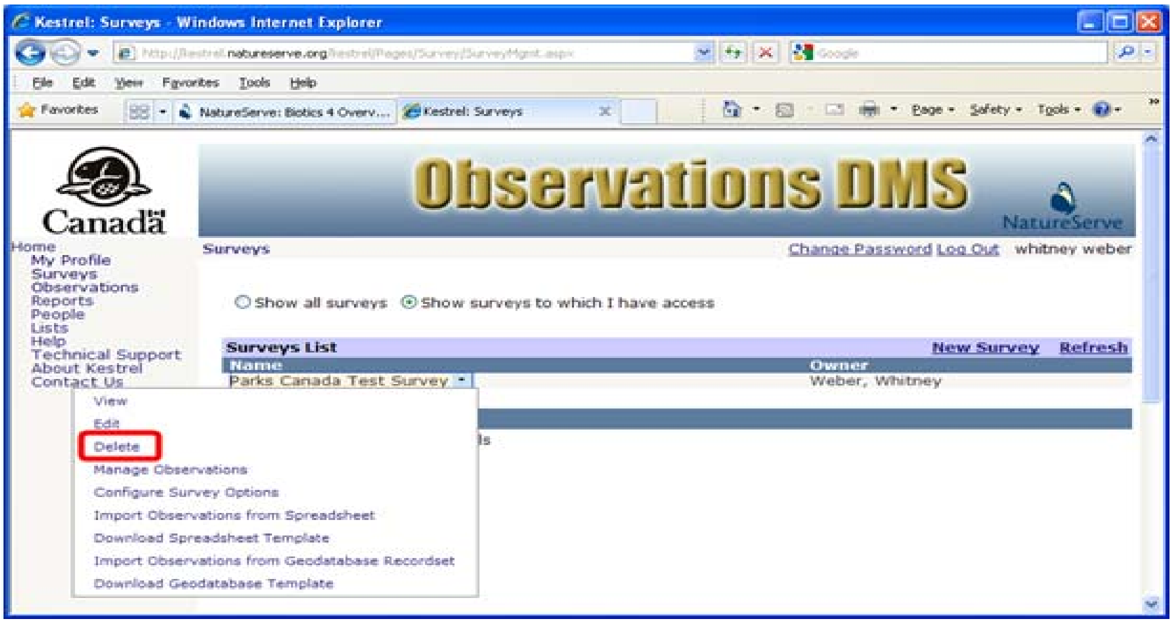


Related Tasks:

- Select Survey Owner
- Add Authorized User
- Delete Survey

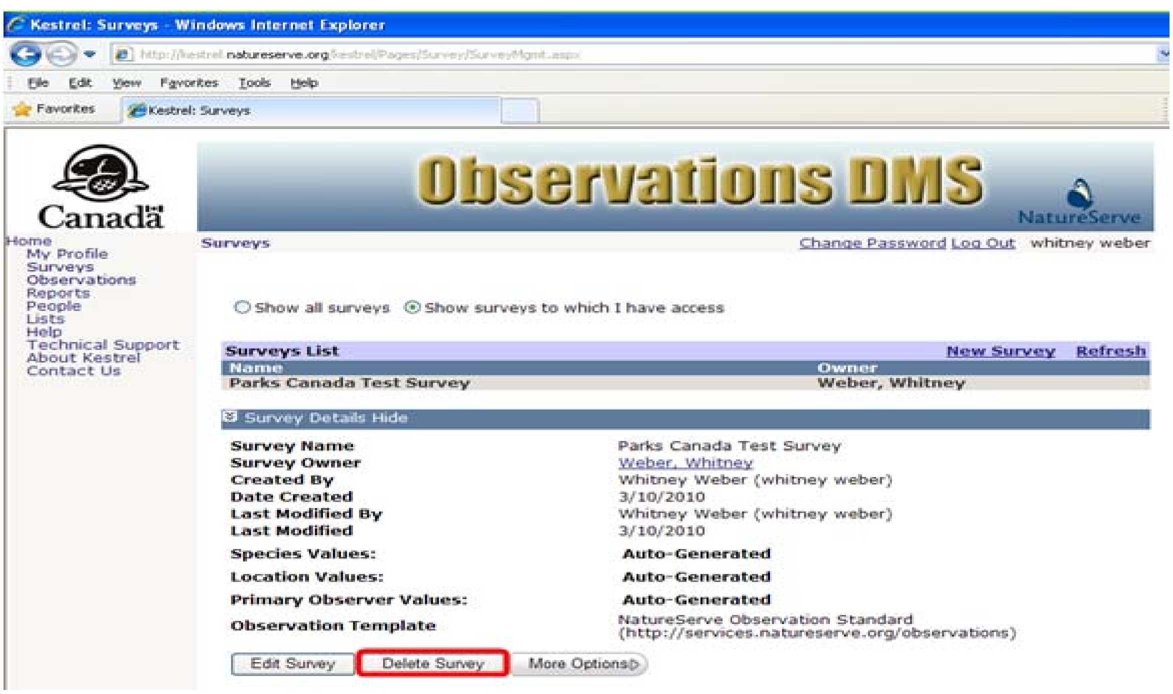
Delete Survey

1. Within the *Surveys* page, click on the survey you wish to delete and select **Delete** from the dropdown list.



- OR -

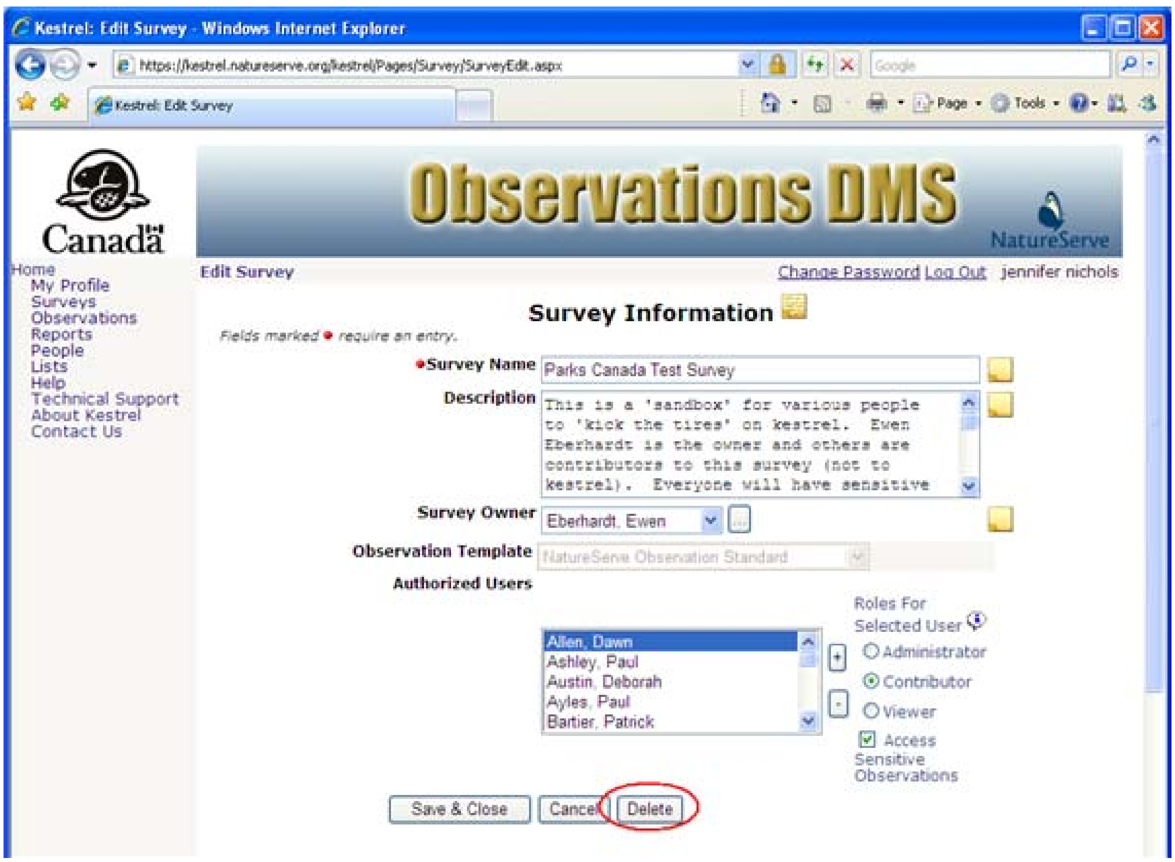
Alternatively, if you have already chosen to **View** the survey, within the Survey Details section select **Delete Survey.**



2. If a survey already contains observations, you will be warned that all observations contained within that survey will be deleted. You have the option to **CANCEL** the deletion at this point or you can proceed to delete the survey and all of its observations by selecting **OK.**

Edit Survey

1. Within the *Edit Survey* page, choose **Delete.**

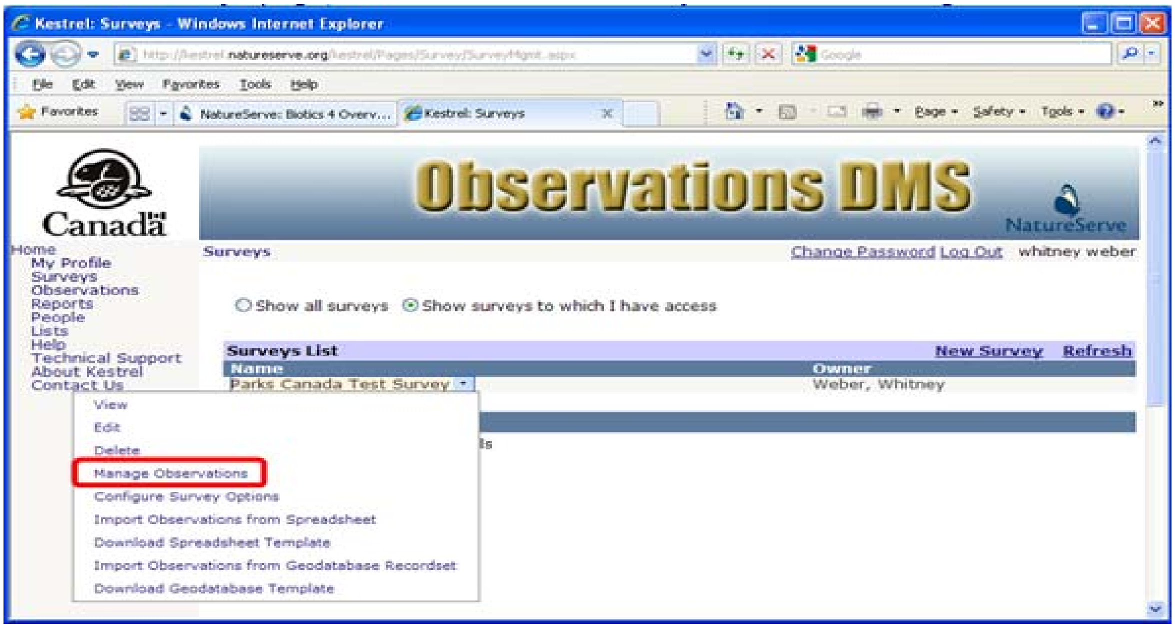


2. If a survey already contains observations, you will be warned that all observations contained within that survey will be deleted. You have the option to **CANCEL** the deletion at this point or you can proceed to delete the survey and all of its observations by selecting **OK.**


Windows Internet Explorer
The current survey and all of its associated observations will be deleted. Are you sure you want to delete the survey and its observations?
OK
Cancel

Manage Observations

1. Within the *Surveys* page, click on the desired survey and choose Manage Observations.

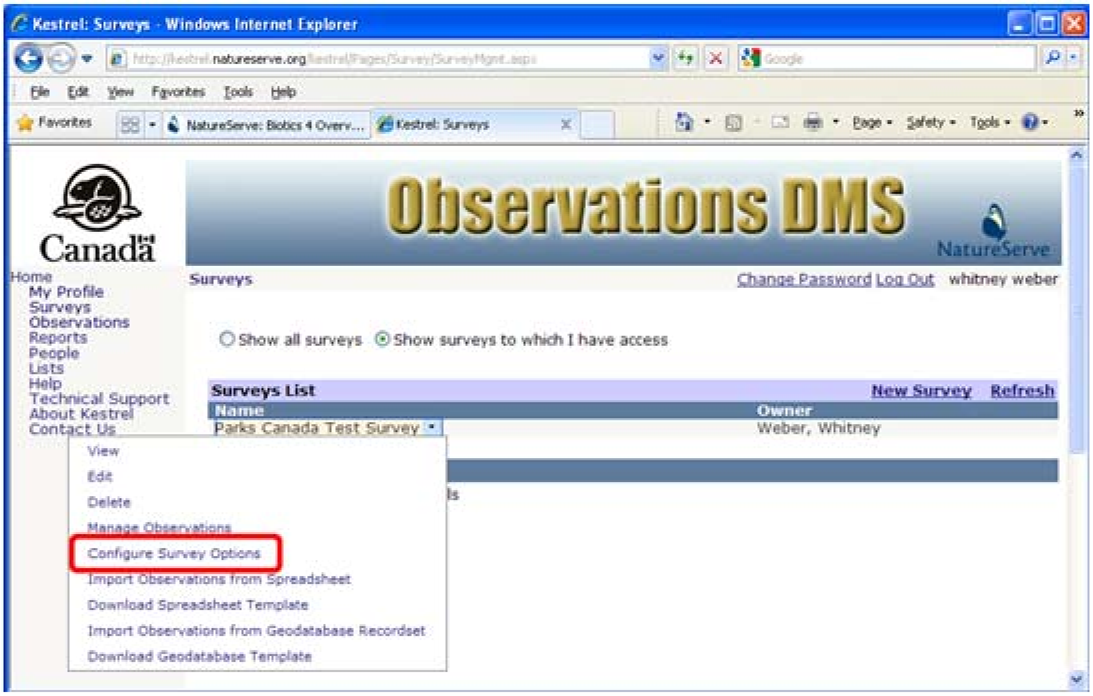


Related Tasks:

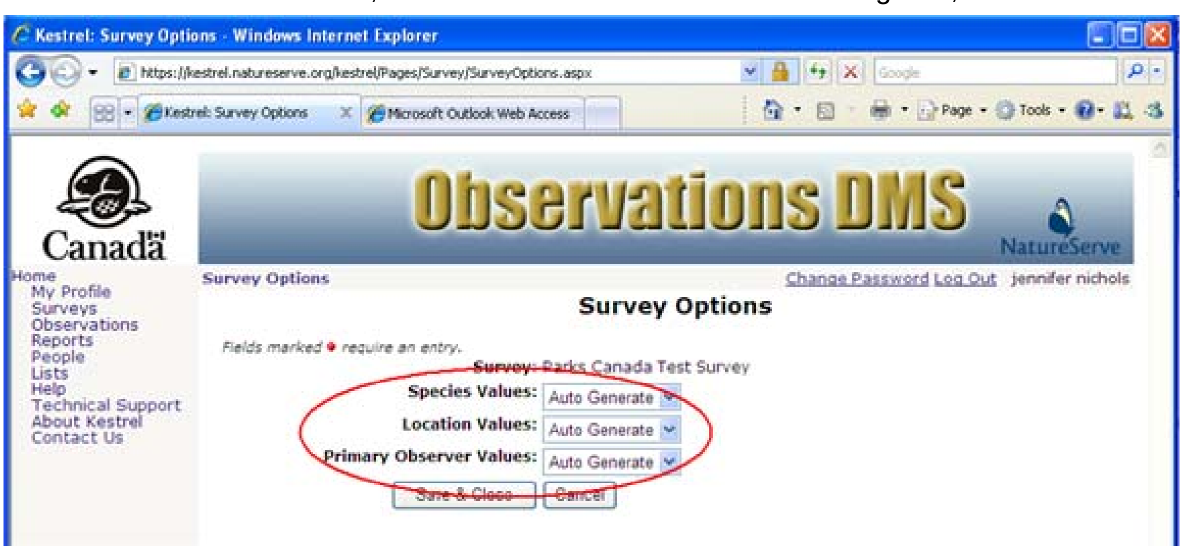
- View Observation
- Edit Observation
- Delete Observation
- Create New Observation

Configure Survey Options

1. Within the *Surveys* page, click on the desired survey to be configured and choose **Configure Survey Options**.



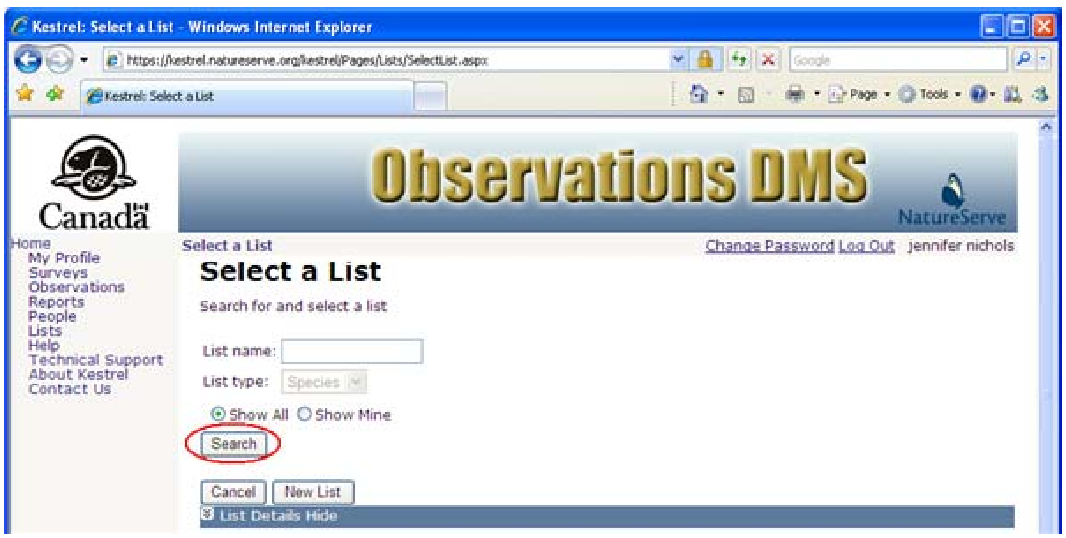
2. Within the *Survey Options* page, select one of two values from the dropdown list for each of the values fields &endash; Species Values, Location Values, and Primary Observer Values &endash; to indicate how each field will be configured, as follows:



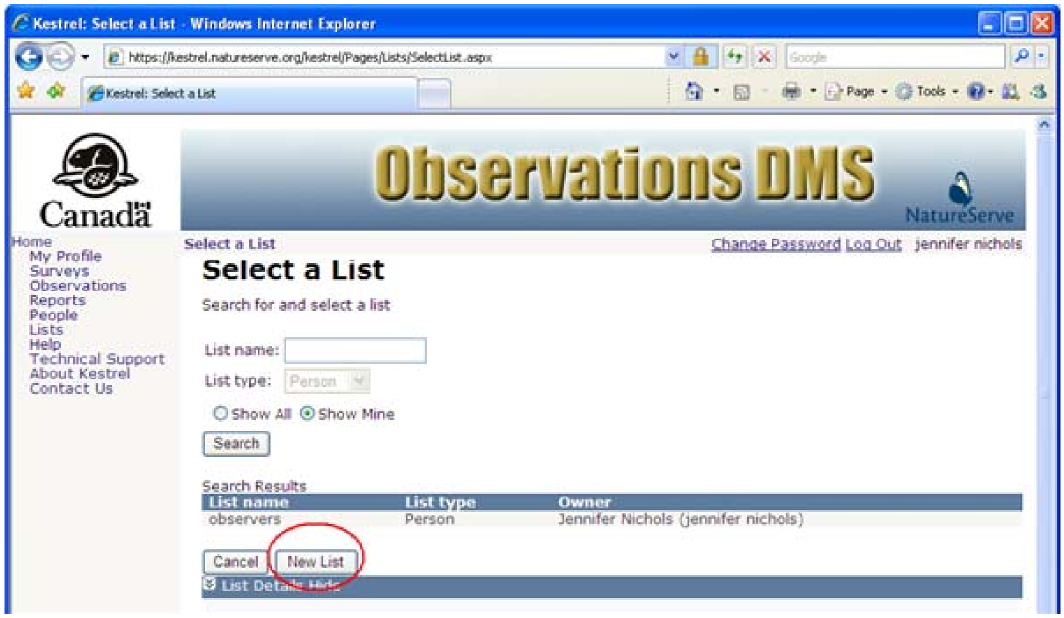
Auto Generate: By default (the default configuration) the system will automatically generate a set of values for that field consisting of the top 20 most-used values for that attribute (i.e., species, location, and primary observer) in this survey.

Use List: If **Use List** is chosen for a configuration field, the *Select a List* page is displayed enabling the user to choose a previously created list or create a new list, The *Select a List* page will default to the appropriate list type for the field to be configured (i.e., species, location, or primary observer). The process for choosing the list to be used for configuring any of the values fields follows.

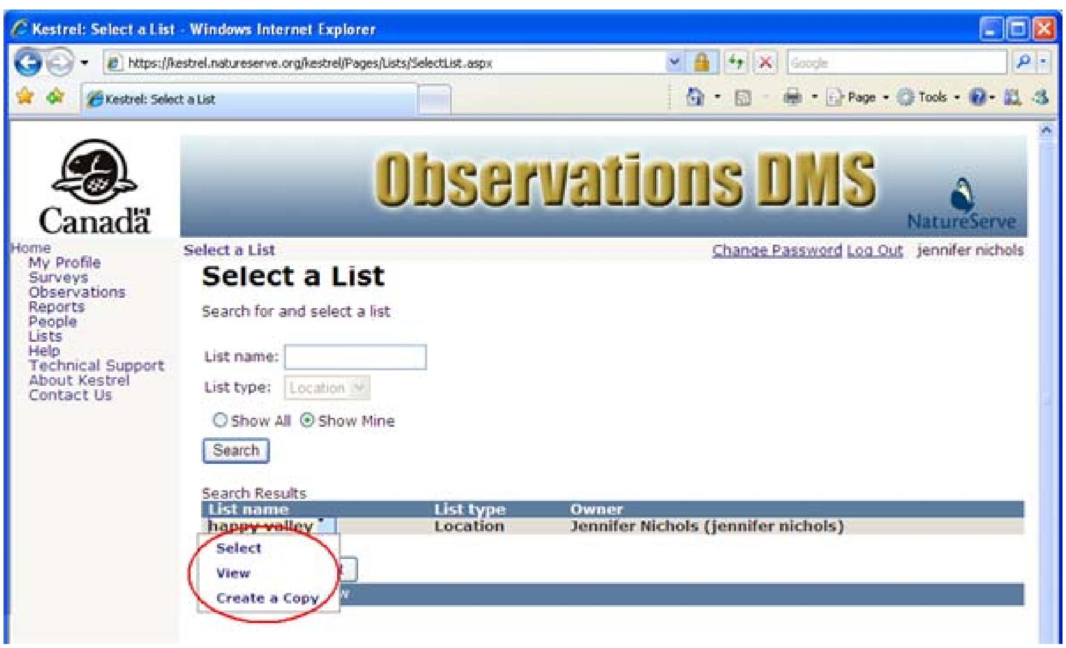
a. Type in the name of a list of the appropriate type for the configuration field (which type is automatically indicated in the List Type field on the *Select a List* page), and click **Search**, To display the entire set of all lists of the specified type, merely click **Search**, using the radio button to indicate whether the results of the search should **Show All** lists of that type, or be restricted to show only those lists of that type that you have created (**Show Mine**).



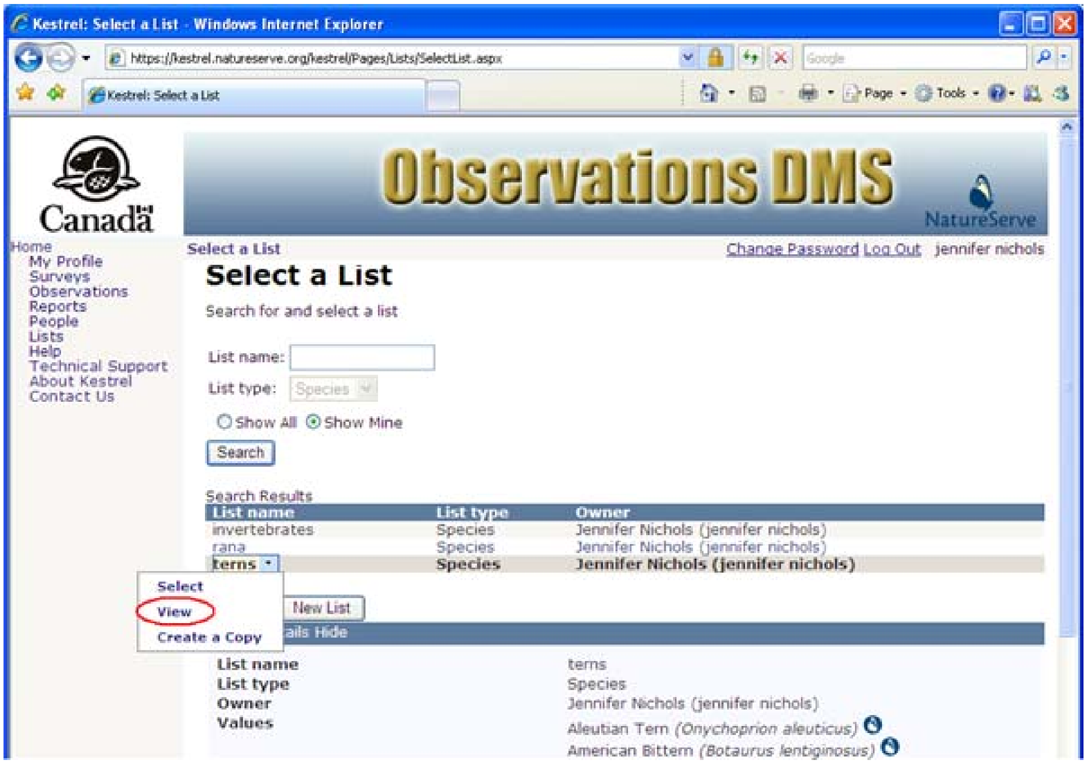
b. If the desired list for configuring a values field has not yet been created, click the **New List** button to open the *Edit List* page to create a new list (see the Create New List topic for instructions on completing the fields on this page).



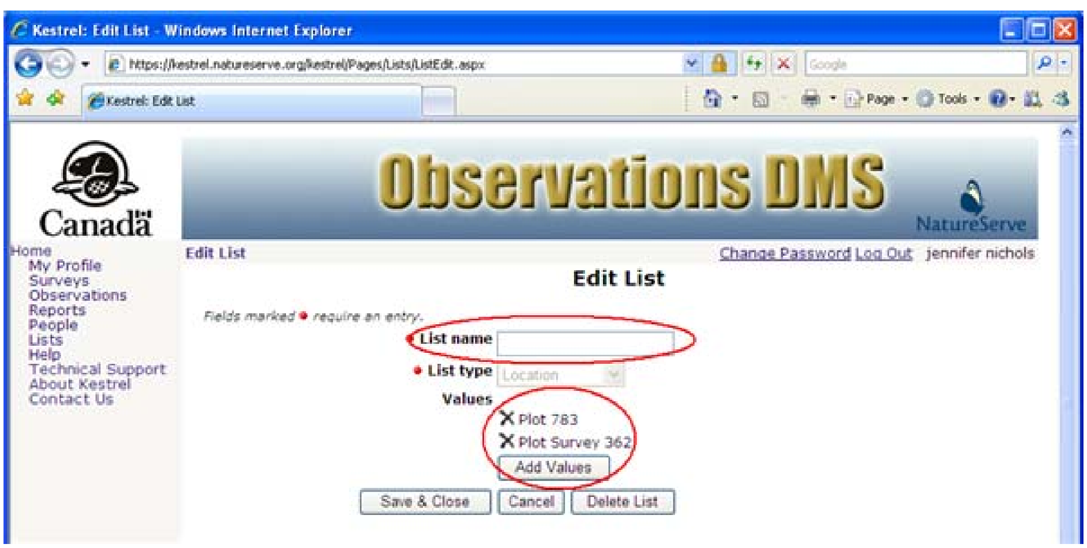
c. In the *Search Results* section select the desired list and choose to **View**, **Copy**, or **Select** the list for use in the survey.



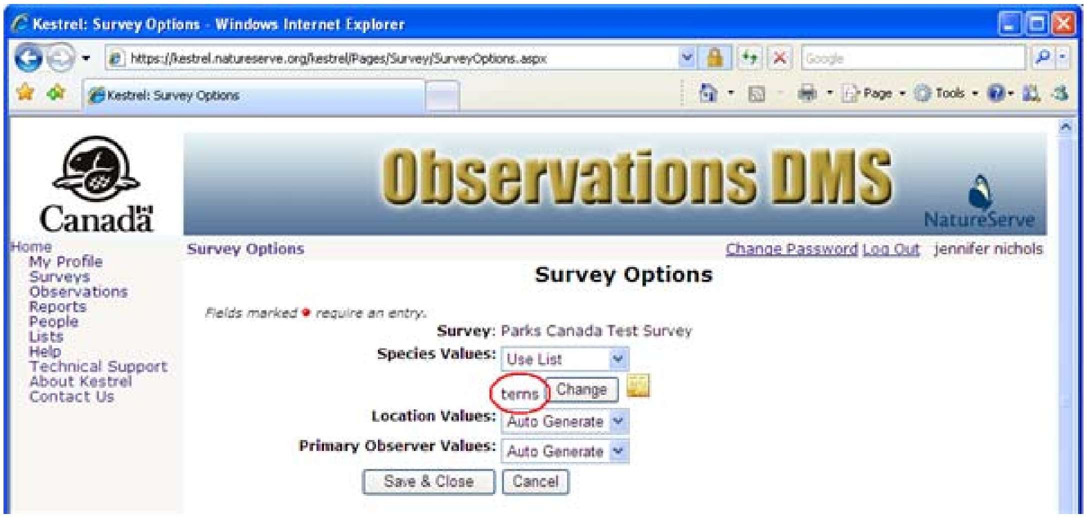
- To view the selected list, choose **View** from the dropdown menu. Expand the List Details section by clicking the icon. Click the icon to hide the List Details section.



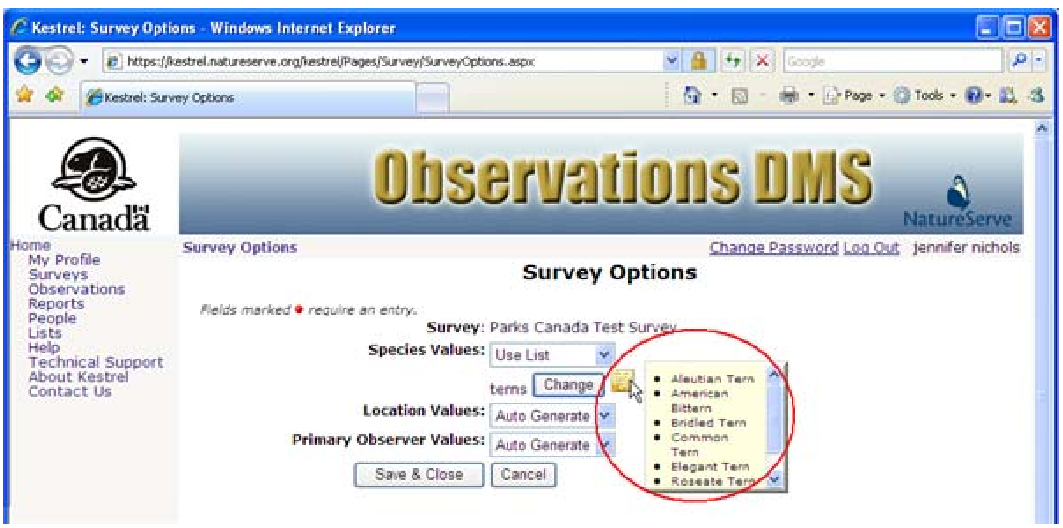
- To copy the selected list, choose **Create a Copy** from the dropdown menu. Within the *Edit List* page, enter a new name for the copied list, add/remove values from the copied set as desired, and click **Save & Close**.



- To use the selected list within the survey, choose **Select** from the dropdown menu, which will return you to the *Survey Options* page. The list selected for the values field will be displayed next to the appropriate values field.



NOTE: To quickly display the values in the selected list, float the pointer over the associated notes icon .



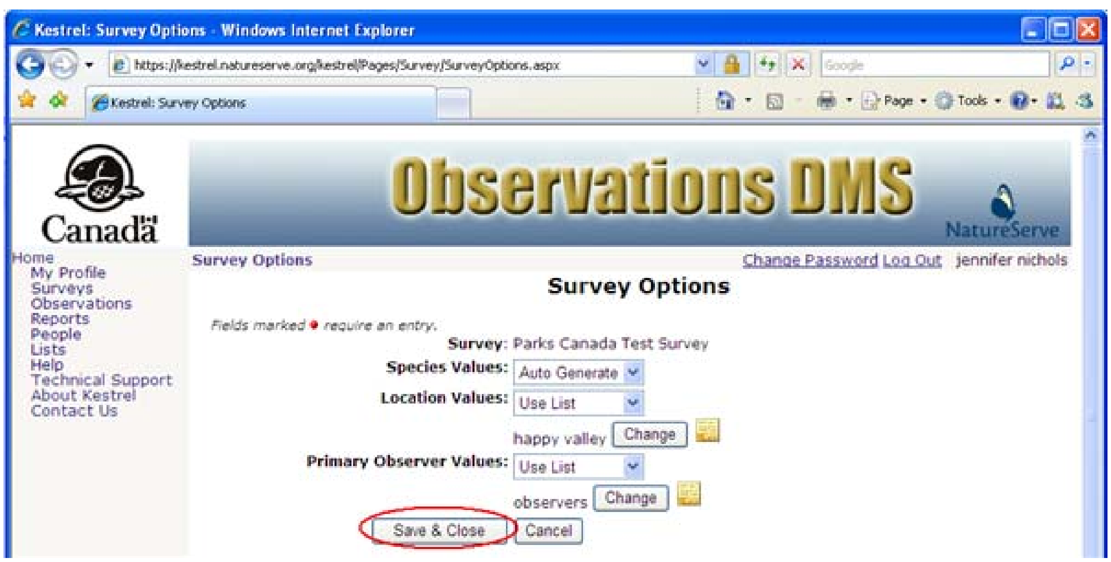
- For any values field(s) not being configured by automatic generation of a list, repeat the processes described in Step 3 above as needed.

3. To change the configuration of any values fields for a survey, within the *Surveys* page, select the survey and click **Configure Survey Options**.

- To change a values field configured using the automatic generation process to use a specified list instead, within the *Survey Options* page select **Use List** from the dropdown menu and proceed as described above to select a list to be used for configuration.
- To change a values field configured using a selected list to utilize the automatic generation process, within the *Survey Options* page select the **Auto Generate** value from the dropdown list for that field.

- To change a values field configured using a selected list to use a different list, within the *Survey Options* page click the **Change** button next to that field, and choose another list in the *Select a List* page, as described above.

4. Once configuration of the three values fields on the *Survey Options* page has been completed, click **Save & Close** to return to the *Surveys* page.



Related Tasks:

- Create a New List
- Create a Copy
- Delete List

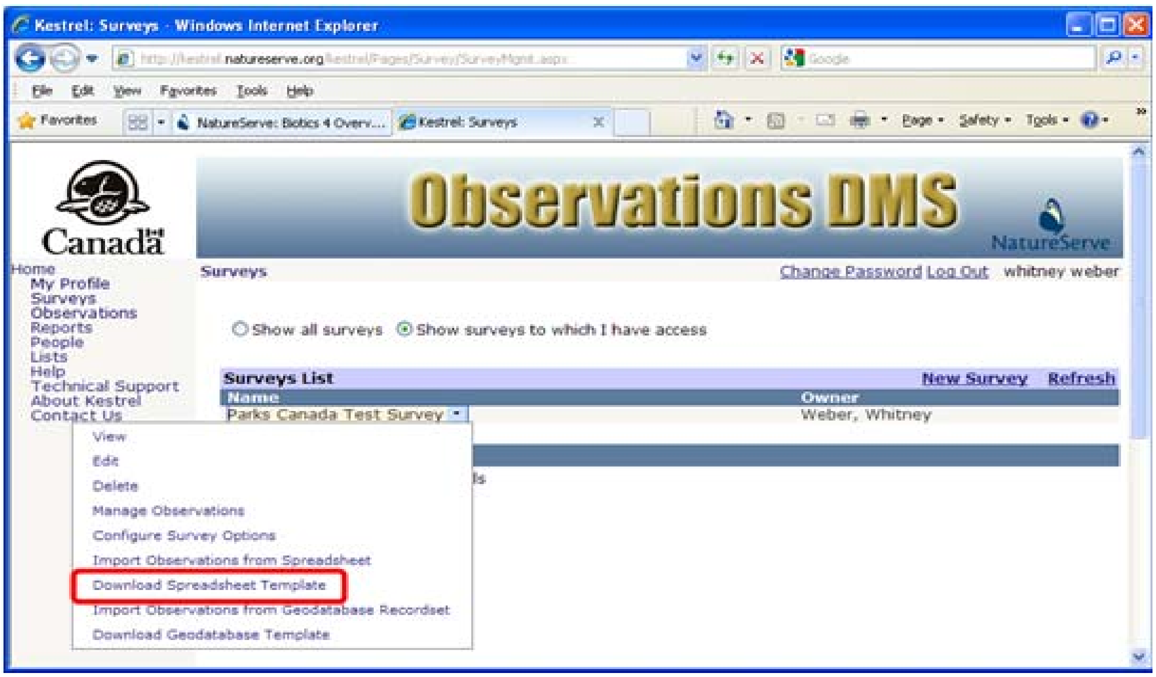
Download Spreadsheet Template

The generated spreadsheet will be tailored to the user's preferences, including language and species name display preferences (common vs scientific).

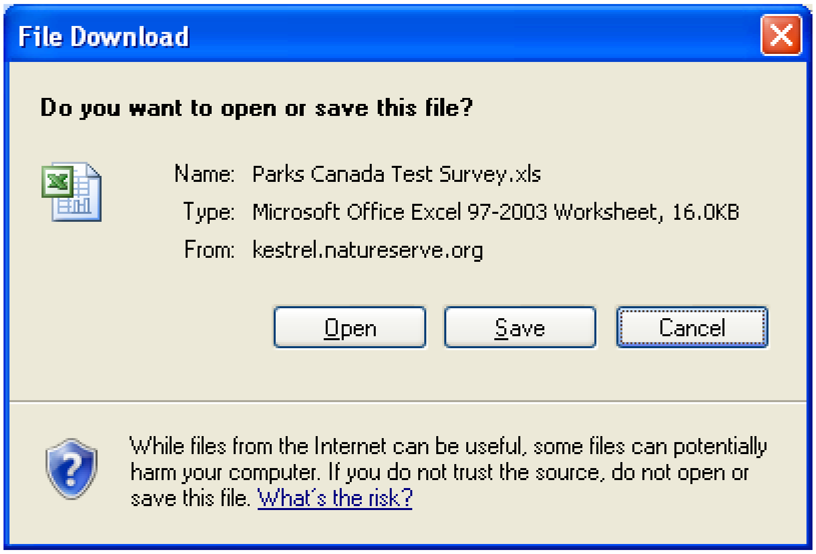
The generated spreadsheet will contain a column for each attribute in the selected survey. If an attribute supports comments, an extra column will be included for the attribute that can be used for this purpose.

Dropdown list values will be available in the spreadsheet as defined and configured for the survey. Dropdown list values for Species, Principal Observer, and Location may be defined for the survey by choosing to **Configure Survey Options**.

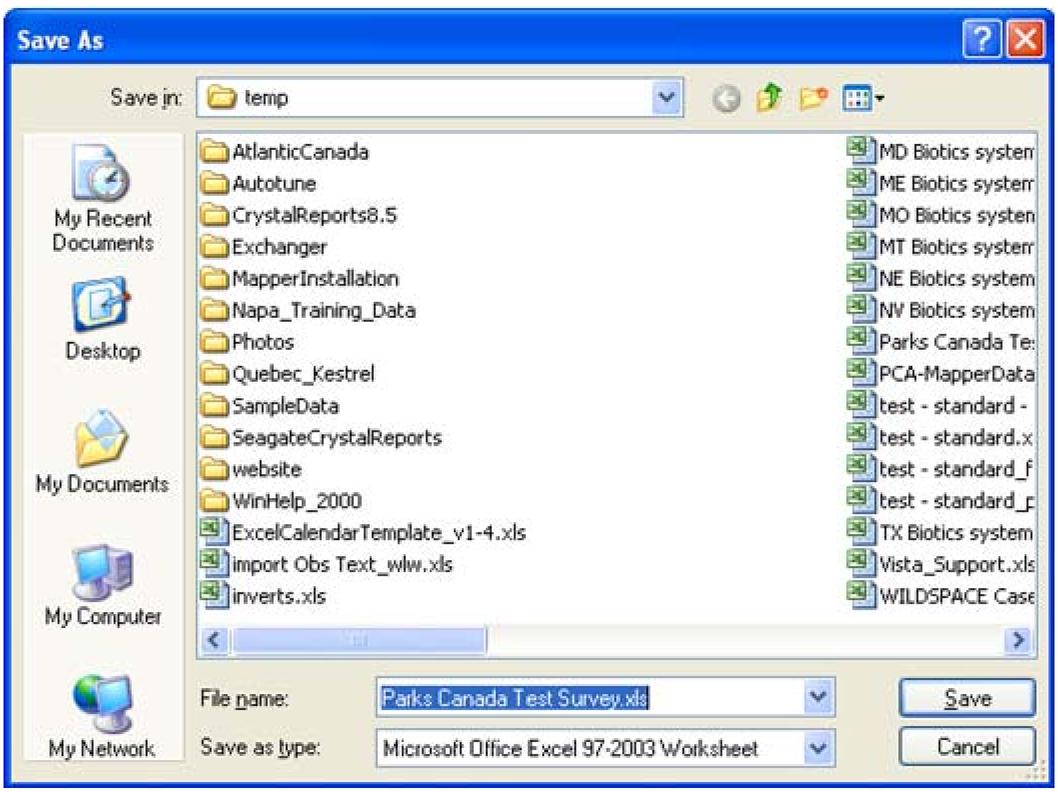
1. Within the *Surveys* page, click on the desired survey into which to import the observations and choose **Download Spreadsheet Template**.



2. In the *File Download* dialog window, choose to **Open** or **Save** the data entry form.



- If you chose to Save the file, within the Save As dialog window, navigate to where you would like it saved and name it as desired.



3. Populate the spreadsheet by entering data or copying and pasting data from another source according to the information below. Required fields are indicated as **(REQ'D)** following the field name (ie. Species (REQ'D)). Field definitions can be found on the **Attribute Help** tab of the spreadsheet.

NOTE: If you copy and paste data from another source, data values which do not match dropdown list values will fail.

Kestrel ID

Do not enter any values into this column. If a value is entered for a row, the row will not be processed during the data import process. After an import process has completed, the generated spreadsheet that contains the processed records will show the Kestrel ID in this column. This prevents the observation from being re-imported during subsequent import operations.

Import Observations

One of the import options prompts whether you want to import all observations or only selected observations. If you elect to import only selected observations, only observations that have some value in this column will be imported. The value itself does not matter.

Numeric values

Numeric values should be entered as numbers. If string values are entered, they will be parsed according to the language preferences of the person who ultimately imports the spreadsheet values. If their language is French, numbers will be assumed to use a comma for the decimal separator.

Boolean values

Boolean values should be entered as boolean values. A dropdown list is provided for Boolean fields, however if the data is copied and pasted into the field, if no value is entered, false will be used. If a string value is encountered, only strings that equal "true" using a case insensitive comparison will be treated as true. Any other value (including "1", "t", "yes", etc) will be treated as false.

Date values

Dates are stored as date ranges, so two columns are provided for entering dates. The first column is used for the start of the range, and the second is used for the end of the range. If you only enter a start date, an end date will be automatically calculated. If no value should be used for an attribute, leave both columns empty.

Values should be entered as excel dates. If you do not enter a time component for the start date, midnight will be used.

Here are the rules for how the end date value is calculated:

- The end date is always adjusted to end at 59 seconds.
- If an end date is specified but the time component is either midnight or not specified, the time component is adjusted to 23:59.
- If no end date is specified, the date of the end date will be the same as the start date. If the start date's time component is either midnight or not specified, the end date's time component will be 23:59. If the start date's time component is the start of an hour (05:00, 19:00, etc), the end date's time component will be the end of the hour (05:59, 19:59, etc). If the start date's time component includes a minute (17:30), the end date's time component will use the same minute.

Species values

The generated excel spreadsheet will contain a dropdown list showing the same choices that would be available through the application for each attribute that is a species value. Depending on how a particular survey is configured, this could either be the most frequently used species within a survey or a user-managed list of species. Either way, each entry in the dropdown list will contain a display value (either a scientific or common name) followed by the biotics identifying code contained within double brackets (ex: Rana aurora [[ELEMENT_NATIONAL.2.167599]]).

If the desired species is present in the dropdown list, the list value should be used. However, it is possible to use a species not found in the list.

The first way to do so is to enter the scientific name of the species to use. When importing records, this value will be used to search for a species with a scientific name or synonym that exactly matches this value, ignoring case. If the name ends with "sp", "sp.", "spp", or "spp." (ignoring case), this suffix will be stripped and the higher level taxonomies will be searched. If exactly one match is found, the species will be used. If the name is a single word (ie. Pholidae), a higher taxonomic search will initially be performed; however, if no results are returned, a common name search will be performed (ie. Raccoon).

The second method is to specify a biotics identifying code in the spreadsheet value, using the same format as the dropdown list. This method is useful for mapping values that will not return a unique result through a search.

Either way, the standard scientific name will be added to the dropdown list in the spreadsheet containing the processed records. The observation's row will use this standard name. If this name does not match the user-entered name (for example, if a synonym was entered), then the user-entered value will automatically be entered as a comment for the attribute. The new entry in the dropdown list will be placed after the default values that are available through the application, in order to make sure that the default values are more easily accessible.

Primary Observer Values

The generated excel spreadsheet will contain a dropdown list showing the same choices that would be available through the application for each attribute that is a reference to a person. Depending on how a particular survey is configured, this could either be the most frequently used primary observers within a survey or a user-managed list of primary observers. Either way, each entry in the dropdown list will contain a display value (the person's full name) followed by the person's primary key contained within double brackets (ex: Jones, Henry Roger [[555]]).

If the desired primary observer is present in the dropdown list, the list value should be used. However, it is possible to use a person not found in the list.

The first method is to enter the primary observer's name. A variety of formats are supported. The following examples show how several values will be parsed into "last, first middle" format:

- Smith, John Paul -> Smith, John Paul
- Smith, John -> Smith, John
- Smith, John P. -> Smith, John P
- John Paul Smith -> Smith, John Paul
- John Smith -> Smith, John
- John P. Smith -> Smith, John P

Here are a few more rules regarding how names are parsed:

- Only the letters A-Z are supported in a name. Foreign characters are not supported.
- If an unsupported character is seen in a string, the character and all following text will be ignored when parsing the name. This means that "John Smith & Joe Smith" will be parsed as "Smith, John".
- If the word " and " appears anywhere in a string, this word and all following text will be ignored when parsing the name. This means that "John Smith and Joe Smith" will be parsed as "Smith, John".
- If multiple whitespace characters appear in a string, all following text will be ignored when parsing the name.
- Names are case sensitive, and the case is not altered in any way from the user-entered value.
- The string " et al" is dropped if it appears at the end of a name.
- Germanic or Spanish last names can be used (von Braun, de la Soto, etc). These will be detected if the first and last names each contain at least one uppercase character. This allows names such as the following to be handled:
  - von Braun, James
  - James von Braun
  - James de la Soto
  - James Allen von Braun (Allen is treated as the middle name because it is the first word between James and Braun that is not capitalized, when starting the search from the right)
- The parsing handles initials. If name is entirely two or three characters long, it will be treated as initials. If only a first name and a last name is specified, the last name contains mixed case, and the first name is all upper case, then the first name is assumed to contain initials. The following examples show how initials are handled:
  - JPS -> S, J P
  - JS -> S, J
  - JP Smith -> Smith, J P
  - JPG Smith -> Smith, J P G ("P G" is the middle name)
  - Smith, JP -> Smith, J P
  - Smith, JPG -> Smith, J P G ("P G" is the middle name)
  - SMITH, JP -> SMITH, JP (the last name is all upper case, so the first name is not split)

Once a name has been parsed, the set of existing person records will be searched for an exact match. The search is limited to people found in the organization that is specified in the Organization field within the spreadsheet, or if not populated, as defined by the Default Organization part of the import options. If exactly one match is found, the record will be used.

If no matches are found, the exact behavior depends on whether the person performing the import has elected to create new person records or not. If they have elected to do so, a new person is created within the specified organization as defined within the spreadsheet or by the default organization if not otherwise specified. If they have not elected to create new person records, an error will be raised.

It is also possible to bypass this search mechanism, and specify the exact person that should be used. This can be done by manually specifying the person's Kestrel ID in square brackets after the person's name, for example, "Smith, John [[555]]".

If a user-entered name does not exactly match the format "Last, First" or "Last, First Middle", then the user-entered value will be entered as a comment for the attribute.

In the same manner that species dropdown lists are maintained, any additional person records that are referenced beyond those found in the attribute's default list of records will be added to the end of the dropdown list in the generated spreadsheet that contains the processed values.

Location Values

Location data is spread across four columns: Named Location, Latitude/Northing, Longitude/Easting, and Shape.

The Named Location column will contain a dropdown list showing the same choices that would be available through the application for each attribute that is a location. Depending on how a particular survey is configured, this could either be the most frequently used named locations within a survey or a user-managed list of named locations. Either way, each entry in the dropdown list will contain a display value (the location's name) followed by the locations's primary key contained within double brackets (ex: Banff Ranger Stations [[555]]).

To use a named location, select the value from the dropdown list. If the named location is not in the dropdown list, enter the name of the location. This value will be used to search for an existing named location. Note that unlike searches for species or person records, this search looks for any locations that partially match the specified name, not an exact match.

An exact named location to use can be specified by including the location's primary key within double brackets following the name.

In the same manner that species dropdown lists are maintained, any additional named location records that are referenced beyond those found in the attribute's default list of records will be added to the end of the dropdown list in the generated spreadsheet that contains the processed values. If a user-entered value doesn't exactly match the location's actual name, the user-entered value is entered as a comment for the attribute.

The Shape column will be populated in the generated spreadsheet containing the processed records to indicate the named location's geometry. If the named location is a point location, the location's geographic coordinates (for the WGS84 datum) will also be populated in the Latitude/Northing and Longitude/Easting columns.

To enter a new point location that is not a named location, leave the Named Location column blank and enter numeric values into the Latitude/Northing and Longitude/Easting columns. The datum used for these coordinates is specified as part of the import options. If the Longitude/Easting value is positive, the coordinates are assumed to be in UTM format, and will use the zone specified as part of the import options. In the generated spreadsheet containing the processed records, the Named Location column will be populated to contain the primary key for this location (ex: [[555]]). However, no entry will added to the dropdown list of named locations. The Shape column will also be populated to indicate that the location is a point.

Values entered in the Shape column are ignored. This is only used to indicate the location's geometry after the record has been inserted into Kestrel.

Entering Comments

Multiple comments can be entered for an attribute by inserting a line break in a comments column. This is done by using alt-enter.

Related Tasks:

- Configure Survey Options
- Import Observations from Spreadsheet

Import Observations from Spreadsheet

It is recommended that you perform a test before you import a spreadsheet. This can allow you to catch mistakes that might otherwise lead to erroneous named location or person records being created. After performing a test, download the processed spreadsheet to preview how the data will be processed. If you need to make any data corrections, you may do so in the processed spreadsheet.

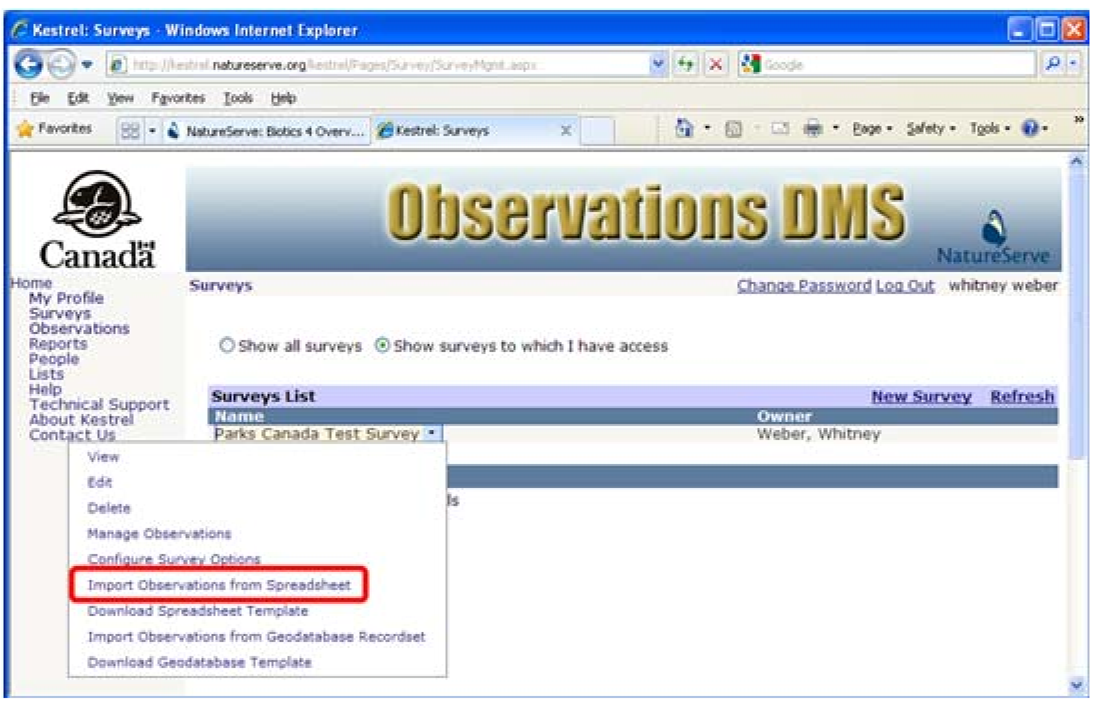
Be aware that a test will not catch all data mistakes. It will detect data format errors, search values that cannot be resolved and required attributes that are missing a value. However, certain mistakes cannot be detected until an attempt is actually made to insert an observation. This includes range checks for numeric values, as well as date range restrictions such as disallowing future observation dates.

Be aware that new locations and person records are entered before an observation is saved. Therefore, new person records and locations may be added to the system even if an observation record cannot be processed.

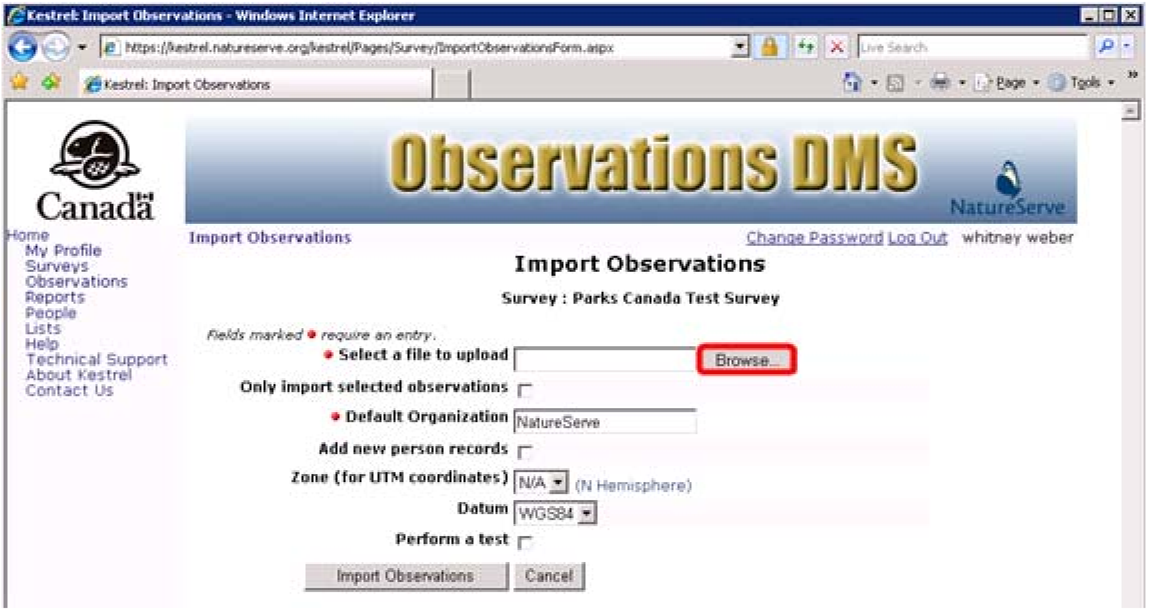
Spreadsheets being imported cannot be larger than 15 megabytes.

Finally, after you import observations, immediately download the processed spreadsheet and use it for tracking new observations in the survey. This should be used to prevent data duplication as any record with a Kestrel ID in the spreadsheet will not be imported. This Kestrel ID will also allow for updates to be made to an observation in a future version of Kestrel. Data updates are not available in the current version.

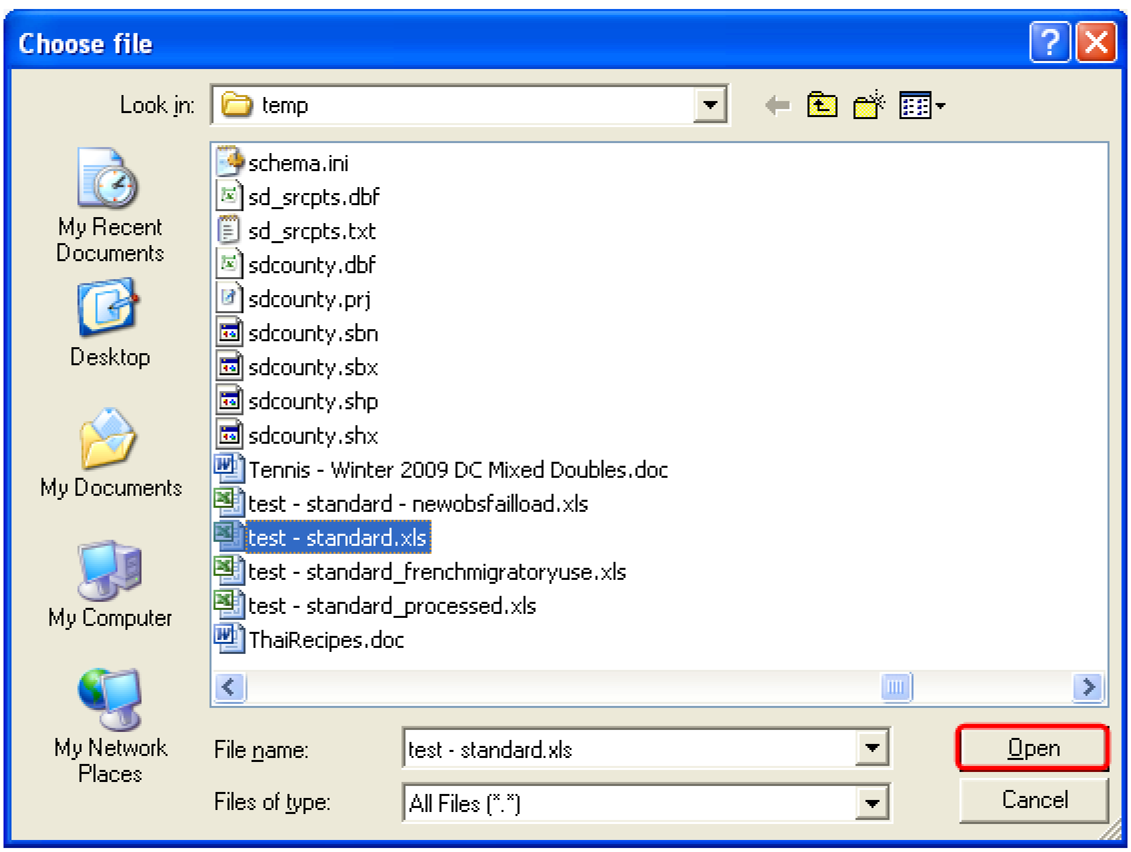
1. Within the *Surveys* page, click on the desired survey into which to import the observations and choose **Import Observations from Spreadsheet**.



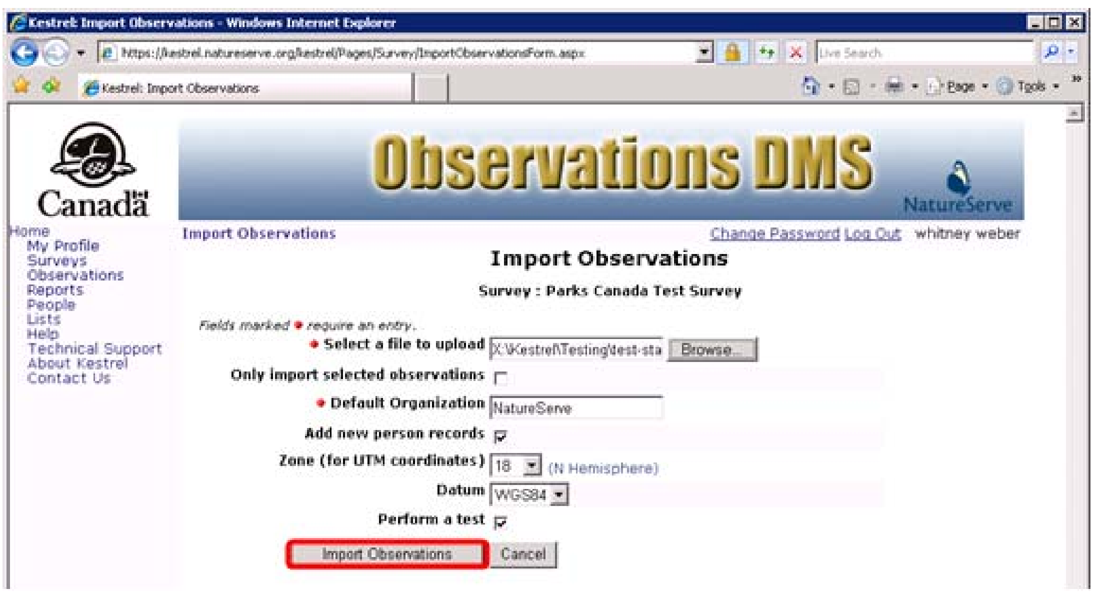
2. Click on **Browse** to browse to the spreadsheet from which to import the observations.



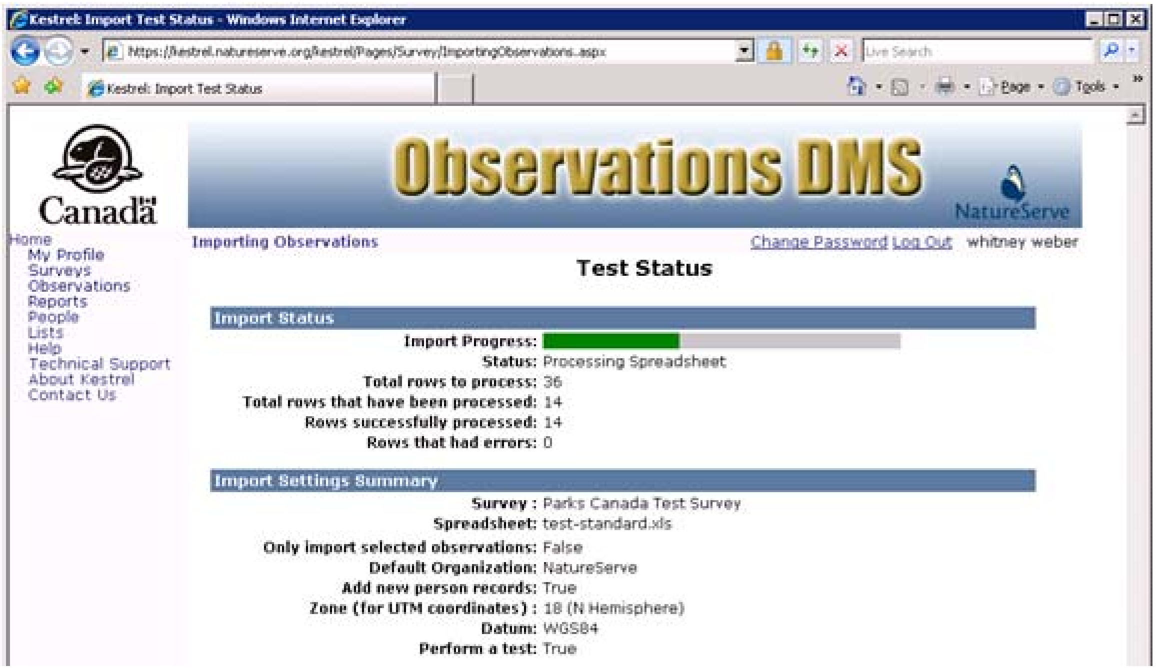
3. In the *Choose File* window, navigate to the spreadsheet from which to import the observations, select it and click **Open**.



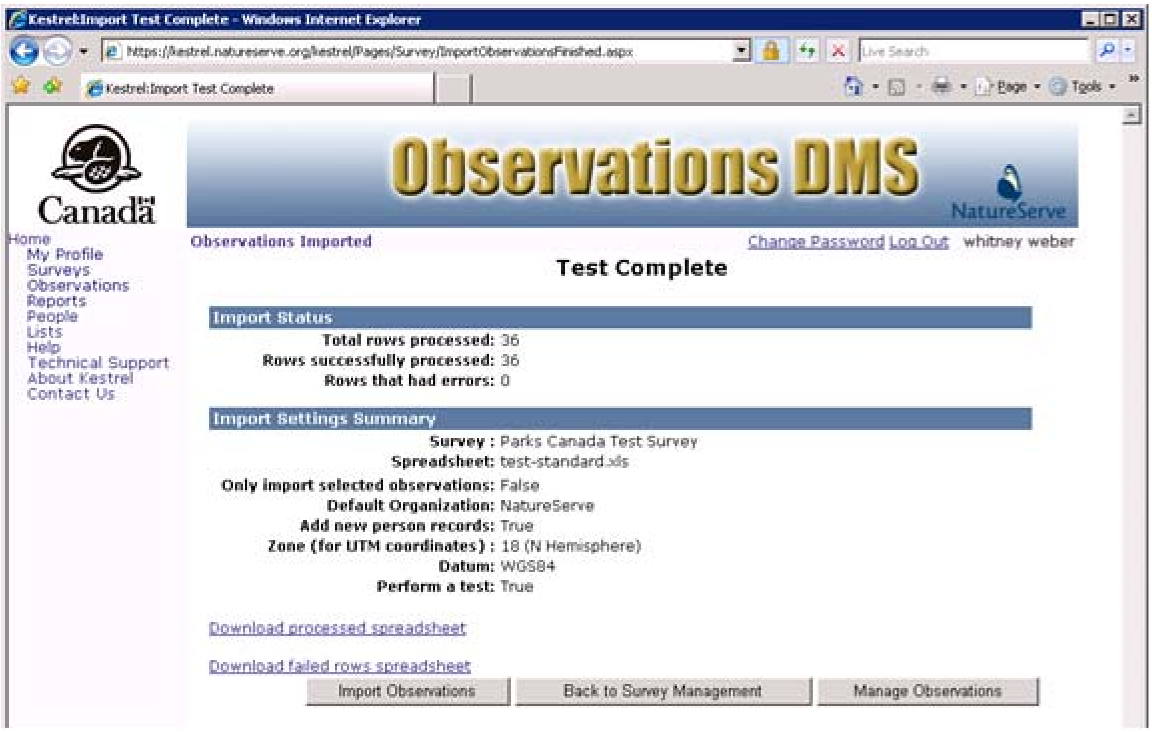
4. Complete the remaining import options, detailed below, as applicable prior to clicking **Import Observations** or **Cancel**.
   - **Only import selected observations**: If checked, only observations that are specifically flagged will be imported. If unchecked, all observations without a Kestrel ID value will be imported.
   - **Default Organization**: If not specified within the spreadsheet data, this value is used when searching for or creating new person (Primary Observer) records.
   - **Add new person records**: If checked, new person records will be created if a matching person cannot be found. If unchecked, new person records will not be inserted and an error will be raised.
   - **Zone (for UTM coordinates)**: Default zone to be used for any location coordinates entered in UTM format, if not otherwise specified in import spreadsheet.
   - **Datum**: This datum will be used for all location coordinates. WGS84 is equivalent to NAD83 for the purposes of Kestrel.
   - **Perform a test**: If checked, the uploaded spreadsheet will be processed, but new records will not be inserted. This will let you preview what will happen and allow you to adjust your spreadsheet accordingly.



5. During the import process, the following page will be entitled *Import Status* or *Test Status* to indicate the progress of the import/test according to your selection criteria on the *Import Observations* page.



6. Once the import has completed, the results of the test/import will be reported on the *Test Complete* or *Import Complete* page, according to whether you chose to **Perform a test**. Your choices include:
    - **Download processed spreadsheet** to review both imported and failed rows.
    - **Download failed rows spreadsheet** to review only the rows that failed import.
    - **Import Observations** to return to the Import Observations webpage in order to either import the spreadsheet (in cases where a test was performed) or perform another test.
    - **Back to Survey Management** to return to the Survey Management webpage.
    - **Manage Observations** to view the survey into which you imported records. NOTE: If you chose to perform a test, your records will not have been imported into the survey.

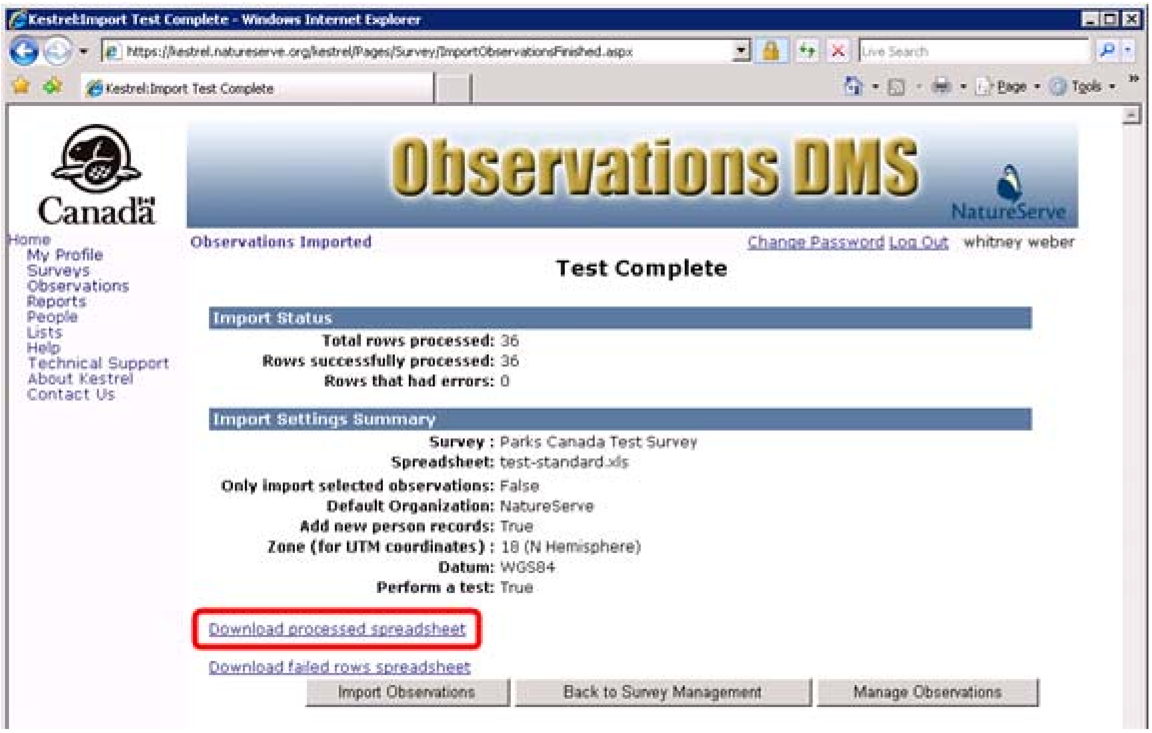


Related Tasks:

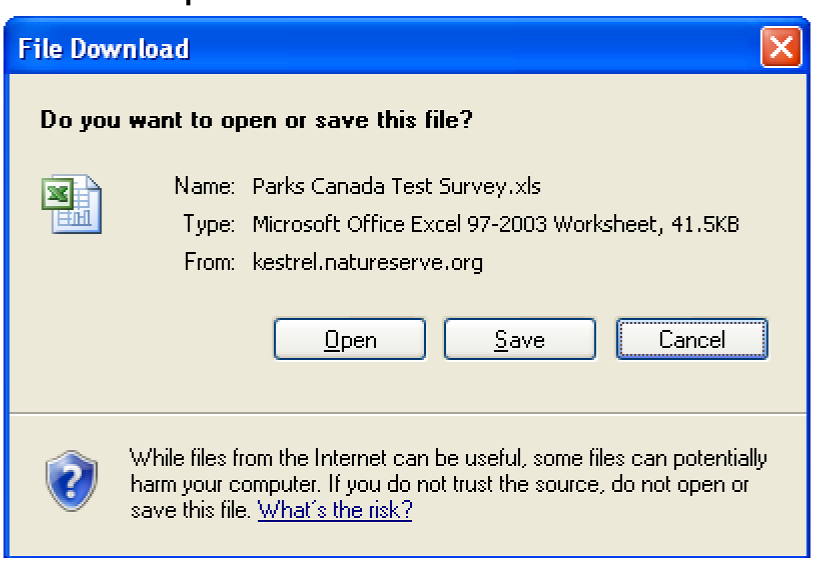
- Manage Observations
- Download Processed Spreadsheet

Download Processed Spreadsheet

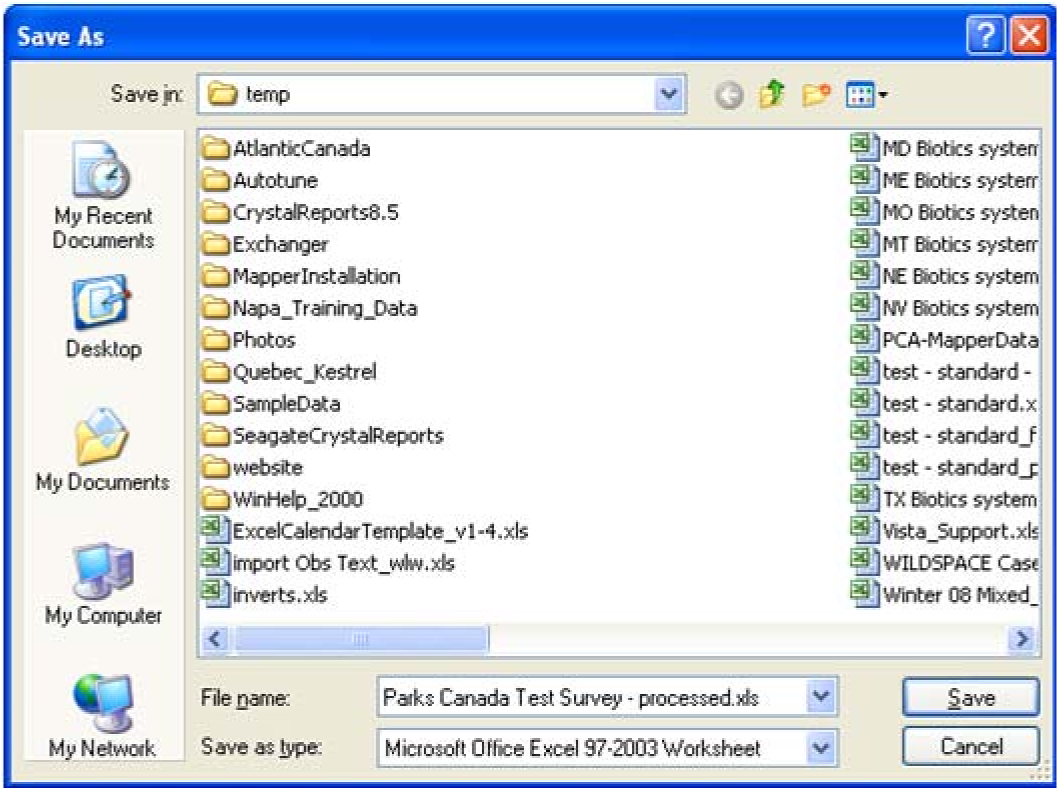
1. Within the *Import Complete* page, select to **Download processed spreadsheet** to review both imported and failed rows.



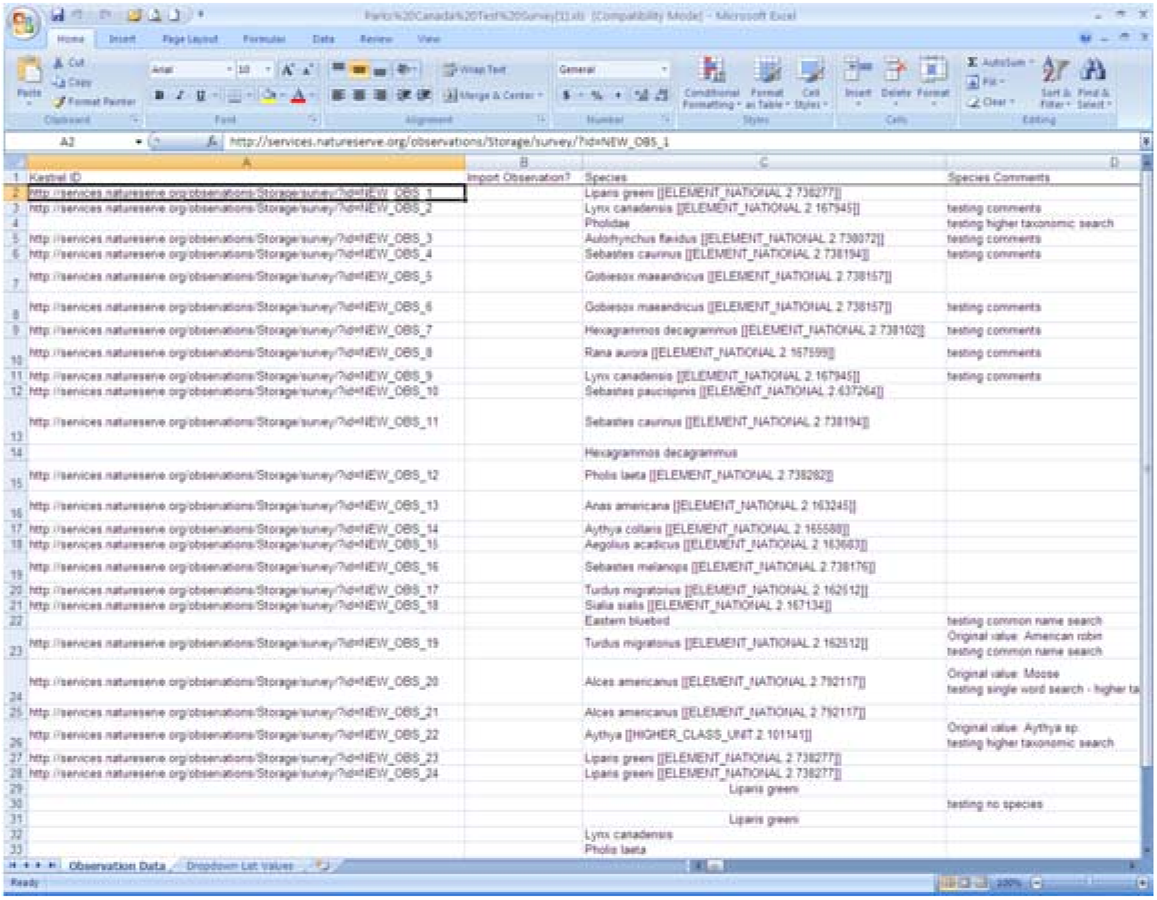
2. Choose to **Open** or **Save** the file.



- If you chose to **Save** the file, within the *Save As* dialog window, navigate to where you would like it saved and name it as desired.



3. Within the processed spreadsheet:
    - **Kestrel ID**: this column will be populated for rows that successfully passed the test (as indicated by &ldots;NEW_OBS_#) or were imported (as indicated by &ldots;observation?id=#).
    - **Import Observations**: If in the Import Observations page, you had indicated to Only import selected observations, this field will be depopulated for any row which succeeded.
    - **Species**: this column is populated with a scientific or common name, depending on the user's settings, followed by the identifying code within the species database. If the species provided within the original spreadsheet is not matched directly but as a synonym to one within the species database, then the scientific/common name followed by the identifying code of the synonym will be used. The original value will be entered as a comment for the attribute.
    - **Error column**: this column is populated with the reason for which a record did not successfully import. The data must be rectified prior to re-importing or reperforming a test.



Related Tasks:

- Import Observations from Spreadsheet

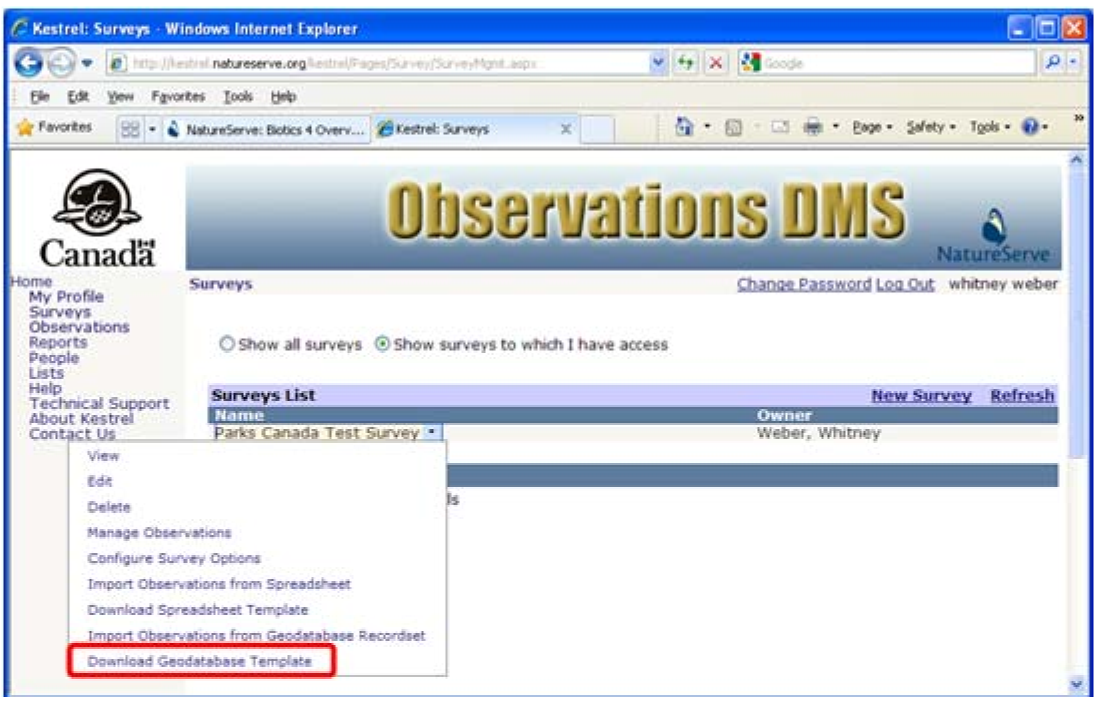
Download Geodatabase Template

The geodatabase template, downloaded via an XML workset, will be tailored to the user's preferences, including language and species name display preferences (common vs scientific).

The generated geodatabase template will contain a column for each attribute in the selected survey, as well as an "r;Import Observation?" attribute and a "r;Kestrel ID" attribute. If an attribute supports comments, an extra column will be included for the attribute that can be used for this purpose.

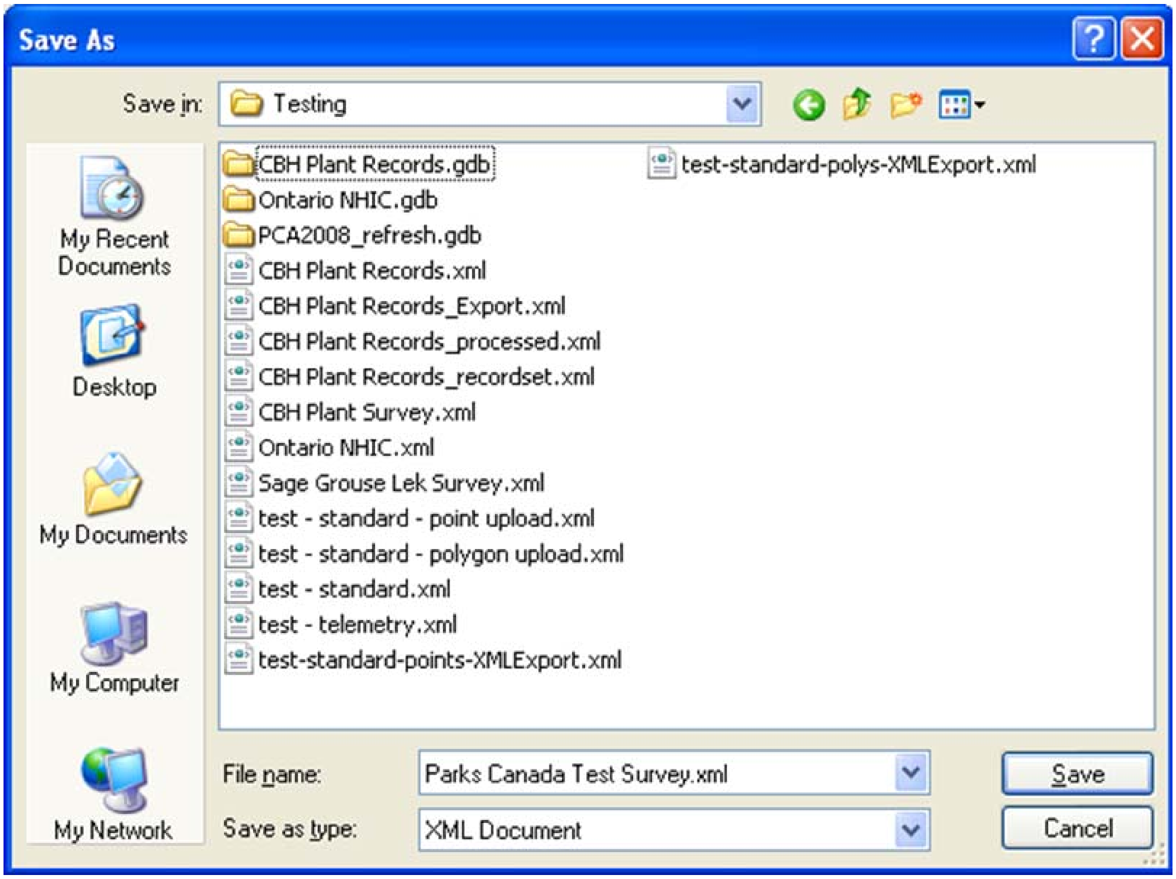
Dropdown list values will be available in the geodatabase as defined and configured for the survey. Dropdown list values for Species, Principal Observer, and Location may be defined for the survey by choosing to Configure Survey Options.

1. Within the *Surveys* page, click on the desired survey into which to import the observations and choose **Download Geodatabase Template**.

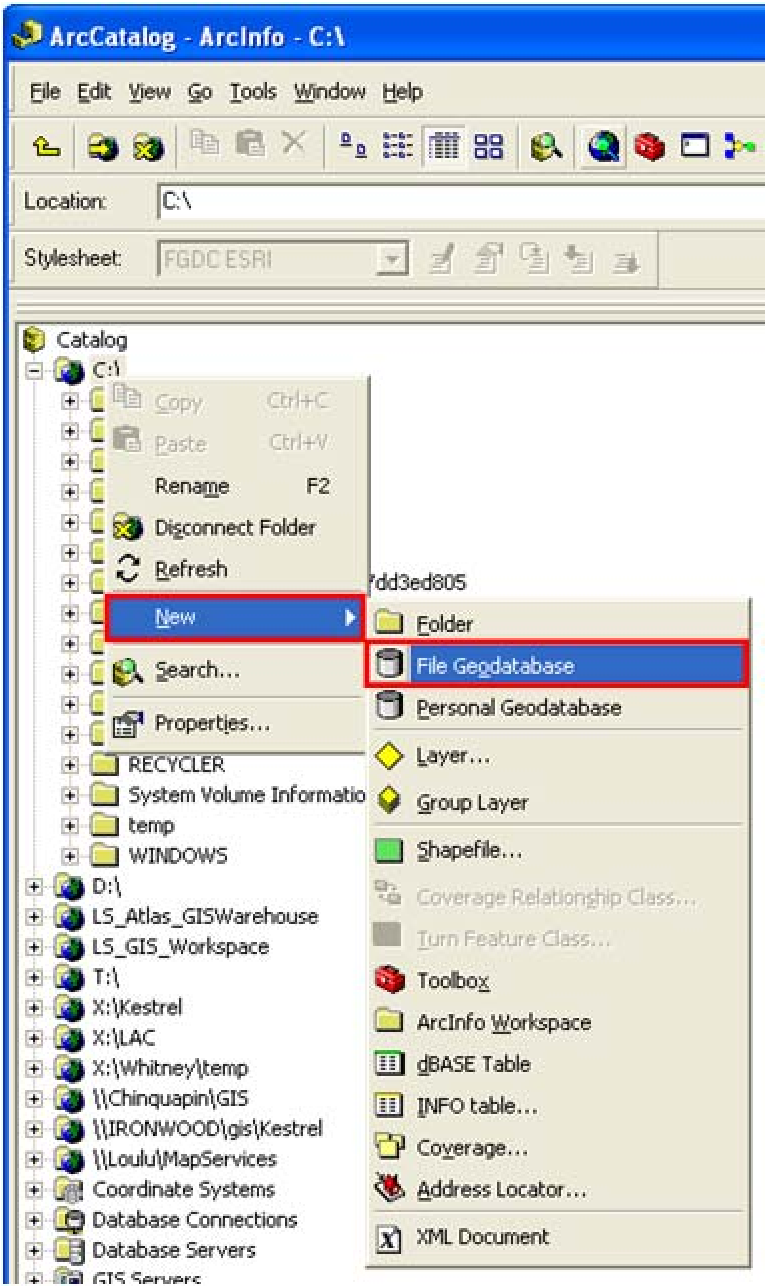


2. In the *File Download* window, choose to **Save** the data entry form.

3. Navigate to where you would like the geodatabase saved and name it as desired.

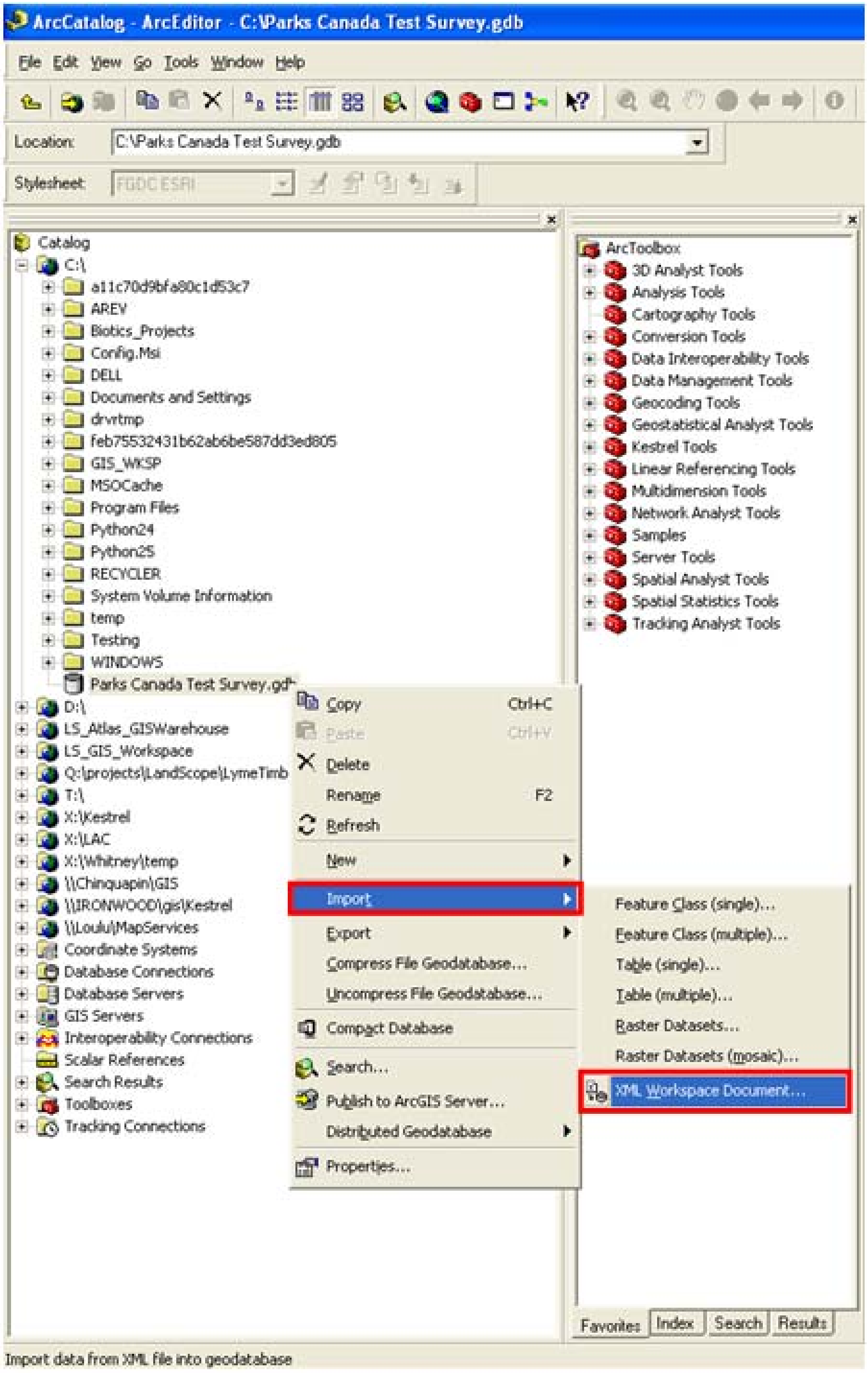


4. In ArcCatalog, right click on the directory where you would like to create the geodatabase and choose **New**, **File Geodatabase** (either File or Personal Geodatabase).

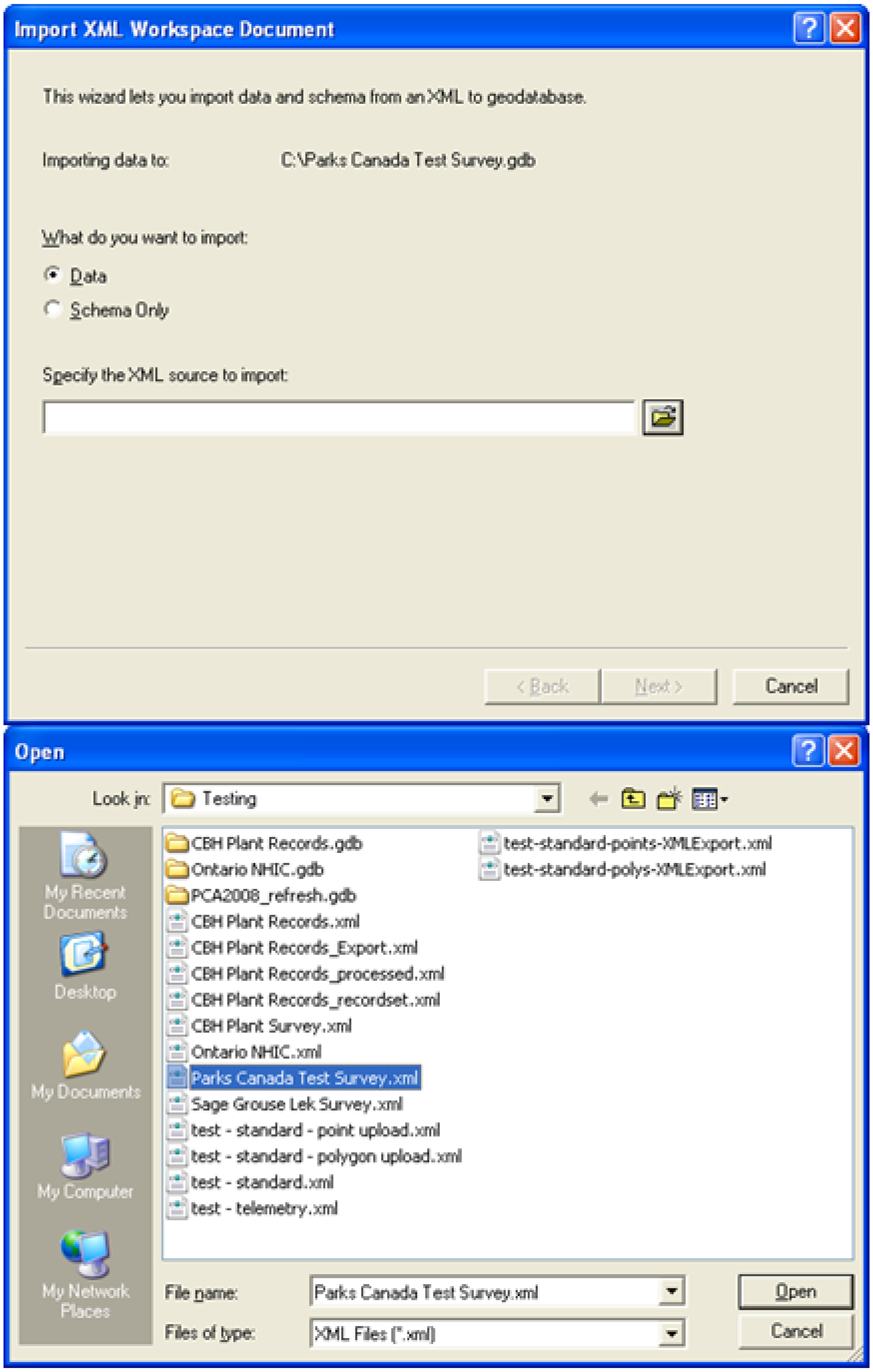


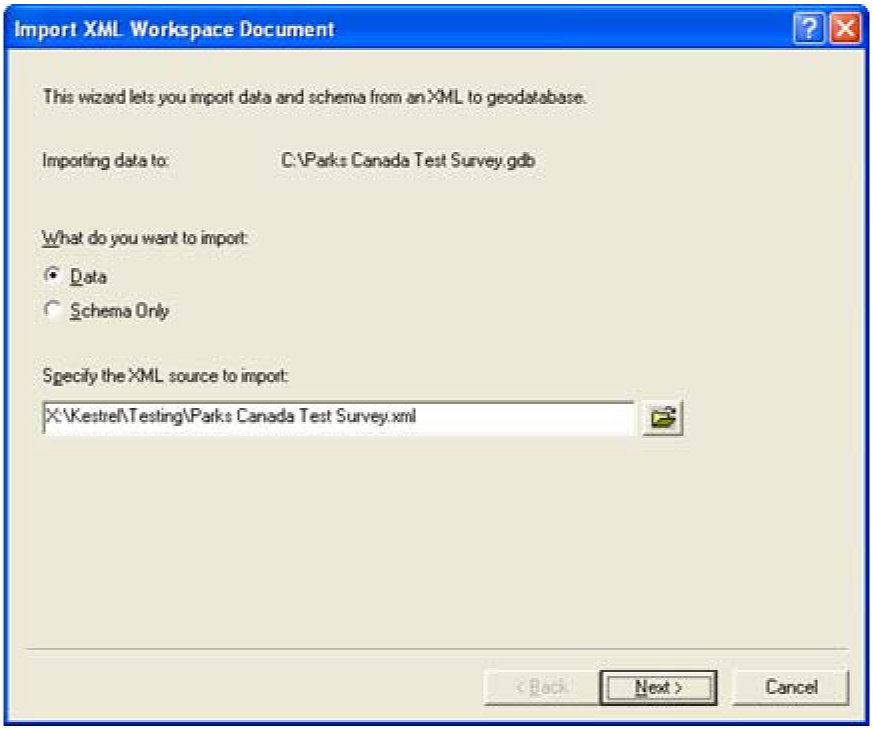
5. Rename the file as desired.
6. Right click on the newly created File/Personal Geodatabase and choose **Import**, **XML Workspace Document**.

NOTE: Importing an XML Workspace document requires an ArcEditor license. The option will be grayed out without the appropriate license.

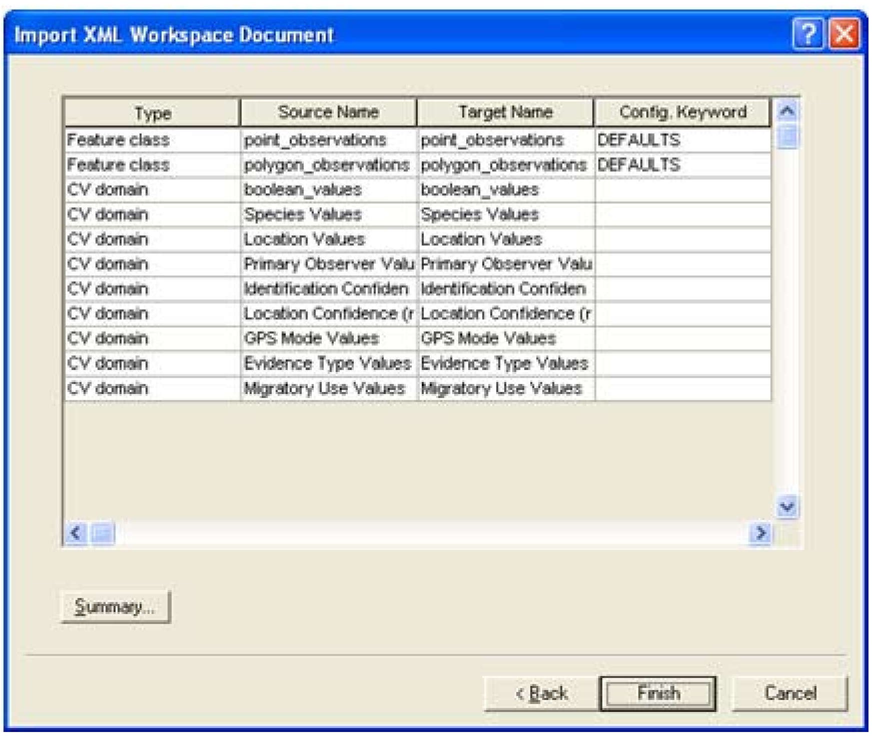


7. In the *Import XML Workspace Document* window, select **Data** and browse to where you saved the xml in Step 2 and click **Next.**

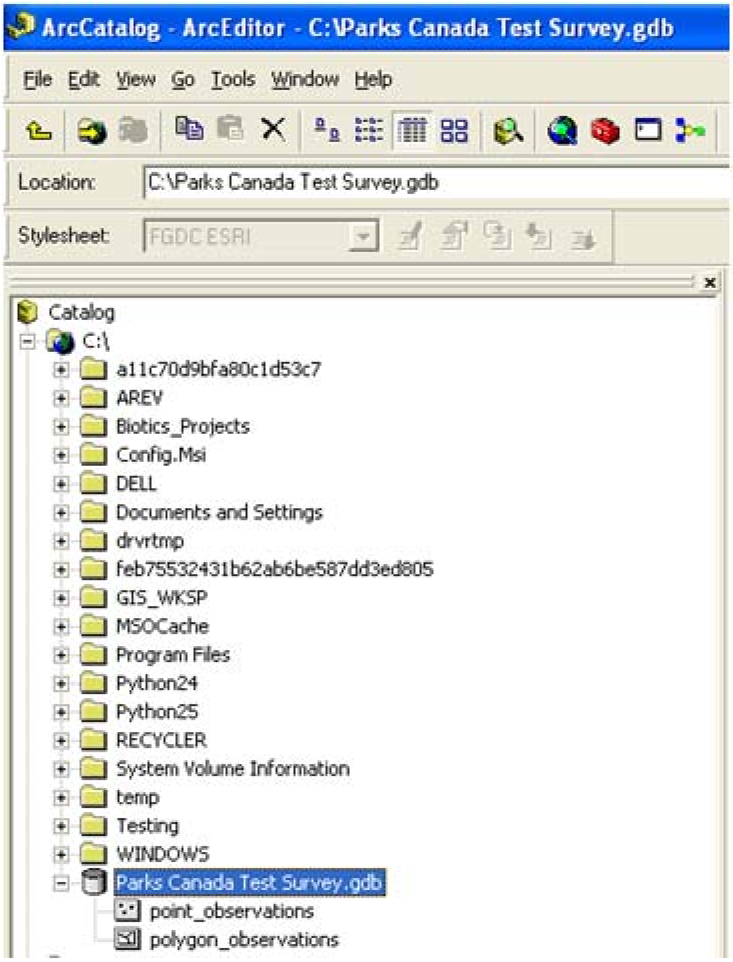

Import XML Workspace Document
This wizard lets you import data and schema from an XML to geodatabase.
Importing data to:
C:\Parks Canada Test Survey.gdb
What do you want to import:
Data
Schema Only
Specify the XML source to import:
< Back
Next >
Cancel
Open
Look in:
Testing
My Recent Documents
Desktop
My Documents
My Computer
My Network Places
CBH Plant Records.gdb
Ontario NHIC.gdb
PCA2008_refresh.gdb
CBH Plant Records.xml
CBH Plant Records_Export.xml
CBH Plant Records_processed.xml
CBH Plant Records_recordset.xml
CBH Plant Survey.xml
Ontario NHIC.xml
Parks Canada Test Survey.xml
Sage Grouse Lek Survey.xml
test - standard - point upload.xml
test - standard - polygon upload.xml
test - standard.xml
test - telemetry.xml
test-standard-points-XMLExport.xml
test-standard-polys-XMLExport.xml
File name:
Parks Canada Test Survey.xml
Files of type:
XML Files (*.xml)
Open
Cancel



8. In the next window, choose **Finish**.



9. The geodatabase schema will be imported and is ready for use:



10. The geodatabase can be populated in one of three ways:

• Populate geodatabase from existing spatial file using ESRI's Simple Data Loader in ArcCatalog

• Populate geodatabase from existing spatial file using ESRI's Object Loader in ArcMap

• Manually enter data into the geodatabase by editing it in ArcMap.

Required fields are indicated as (REQ'D) following the field name (ie. Species (REQ'D)).

NOTE: Both the Simple Data Loader and Object Loader allow the user to crosswalk data from fields in the existing data set to corresponding fields in the Kestrel geodatabase template. If you copy and paste data from another source, data values which do not match dropdown list values will fail.

Kestrel ID

Do not enter any values into this column. If a value is entered for a row, the row will not be processed during the data import process. After an import process has completed, the generated spreadsheet that contains the processed records will show the Kestrel ID in this column. This prevents the observation from being re-imported during subsequent import operations.

Import Observations

One of the import options prompts whether you want to import all observations or only selected observations. If you elect to import only selected observations, only observations that have some value in this column will be imported. The value itself does not matter.

Numeric values

Numeric values should be entered as numbers. If string values are entered, they will be parsed according to the language preferences of the person who ultimately imports the spreadsheet values. If their language is French, numbers will be assumed to use a comma for the decimal separator.

Boolean values

Boolean values should be entered as boolean values. A dropdown list is provided for Boolean fields, however if the data is copied and pasted into the field, if no value is entered, false will be used. If a string value is encountered, only strings that equal "true" using a case insensitive comparison will be treated as true. Any other value (including "1", "t", "yes", etc) will be treated as false.

Date values

Dates are stored as date ranges, so two columns are provided for entering dates. The first column is used for the start of the range, and the second is used for the end of the range. If you only enter a start date, an end date will be automatically calculated. If no value should be used for an attribute, leave both columns empty.

Values should be entered as excel dates. If you do not enter a time component for the start date, midnight will be used.

Here are the rules for how the end date value is calculated:

- The end date is always adjusted to end at 59 seconds.
- If an end date is specified but the time component is either midnight or not specified, the time component is adjusted to 23:59.
- If no end date is specified, the date of the end date will be the same as the start date. If the start date's time component is either midnight or not specified, the end date's time component will be 23:59. If the start date's time component is the start of an hour (05:00, 19:00, etc), the end date's time component will be the end of the hour (05:59, 19:59, etc). If the start date's time component includes a minute (17:30), the end date's time component will use the same minute.

Species values

Because the geodatabase format does not allow manual data entry in dropdown list fields, two columns are present for Species, one marked ”r;Species (REQ’D)” and one called ”r;Species

Search Value. If a value is chosen from the dropdown list of the ”r;Species (REQ’D)” field AND entered into the ”r;Species Search Value” field, the dropdown value takes precedence.

If the desired species is present in the ”r;Species (REQ’D)” dropdown list, the list value should be used. However, it is possible to use a species not found in the list by entering the scientific name of the species to use in the ”r;Species Search Value” field. When importing records, this value will be used to search for a species with a scientific name or synonym that exactly matches this value, ignoring case. If the name ends with "sp", "sp.", "spp", or "spp." (ignoring case), this suffix will be stripped and the higher level taxonomies will be searched. If a single match is found, the species will be added to the dropdown list, and the processed record will have the appropriate species selected in the "Species (REQ'D)" field. If the name is a single word (ie. Pholidae), a higher taxonomic search will initially be performed; however, if no results are returned, a common name search will be performed (ie. Raccoon).

Another method to indicate the species is to specify a Biotics identifying code in the ”r;Species Search Value” field, using the same format as the dropdown list. This method is useful for mapping values that will not return a unique result through a search.

The dropdown list values in the geodatabase reflect the same choices that would be available through the application for Observed Species. Depending on how a particular survey is configured, this could either be the most frequently used species within a survey (by default) or a user-managed list of species. Either way, the standard scientific name will be added to the dropdown list in the geodatabase containing the processed records. The observation's row will use this standard name. If this name does not match the user-entered name (for example, if a synonym was entered), then the user-entered value will automatically be entered as a comment for the attribute. The new entry in the dropdown list will be placed after the default values that are available through the application, in order to make sure that the default values are more easily accessible.

Primary Observer Values

Because the geodatabase format does not allow manual data entry in dropdown list fields, two columns are present for Primary Observer, one marked ”r;Primary Observer (REQ’D)” and one called ”r;Primary Observer Search Value. If a value is chosen from the dropdown list of the ”r;Primary Observer (REQ’D)” field AND entered into the ”r;Primary Observer Search Value” field, the dropdown value takes precedence.

The generated excel spreadsheet will contain a dropdown list showing the same choices that would be available through the application for each attribute that is a reference to a person. Depending on how a particular survey is configured, this could either be the most frequently used primary observers within a survey or a user-managed list of primary observers. Either way, each entry in the dropdown list will contain a display value (the person's full name) followed by the person's primary key contained within double brackets (ex: Jones, Henry Roger [[555]]).

If the desired primary observer is present in the dropdown list, the list value should be used. However, it is possible to use a person not found in the list.

The first method is to enter the primary observer's name within the ”r;Primary Observer Search Value” field. A variety of formats are supported. The following examples show how several values will be parsed into "last, first middle" format:

- Smith, John Paul -> Smith, John Paul
- Smith, John -> Smith, John
- Smith, John P. -> Smith, John P
- John Paul Smith -> Smith, John Paul
- John Smith -> Smith, John
- John P. Smith -> Smith, John P

Here are a few more rules regarding how names are parsed:

- Only the letters A-Z are supported in a name. Foreign characters are not supported.
- If an unsupported character is seen in a string, the character and all following text will be ignored when parsing the name. This means that "John Smith & Joe Smith" will be parsed as "Smith, John".
- If the word " and " appears anywhere in a string, this word and all following text will be ignored when parsing the name. This means that "John Smith and Joe Smith" will be parsed as "Smith, John".
- If multiple whitespace characters appear in a string, all following text will be ignored when parsing the name.
- Names are case sensitive, and the case is not altered in any way from the user-entered value.
- The string " et al" is dropped if it appears at the end of a name.
- Germanic or Spanish last names can be used (von Braun, de la Soto, etc). These will be detected if the first and last names each contain at least one uppercase character. This allows names such as the following to be handled:
    - von Braun, James
    - James von Braun
    - James de la Soto
    - James Allen von Braun (Allen is treated as the middle name because it is the first word between James and Braun that is not capitalized, when starting the search from the right)
- The parsing handles initials. If name is entirely two or three characters long, it will be treated as initials. If only a first name and a last name is specified, the last name contains mixed case, and the first name is all upper case, then the first name is assumed to contain initials. The following examples show how initials are handled:
    - JPS -> S, J P
    - JS -> S, J
    - JP Smith -> Smith, J P
    - JPG Smith -> Smith, J P G ("P G" is the middle name)
    - Smith, JP -> Smith, J P

- Smith, JPG -> Smith, J P G ("P G" is the middle name)
- SMITH, JP -> SMITH, JP (the last name is all upper case, so the first name is not split)

Once a name has been parsed, the set of existing person records will be searched for an exact match. The search is limited to people found in the organization that is specified in the Organization field within the spreadsheet, or if not populated, as defined by the Default Organization part of the import options. If exactly one match is found, the record will be used.

If no matches are found, the exact behavior depends on whether the person performing the import has elected to create new person records or not. If they have elected to do so, a new person is created within the specified organization as defined within the spreadsheet or by the default organization if not otherwise specified. If they have not elected to create new person records, an error will be raised.

It is also possible to bypass this search mechanism, and specify the exact person that should be used. This can be done by manually specifying the person's Kestrel ID in square brackets, in the ”r;Primary Observer Search Value” field, after the person's name, for example, "Smith, John [[555]]".

If a user-entered name does not exactly match the format "Last, First" or "Last, First Middle", then the user-entered value will be entered as a comment for the attribute.

In the same manner that species dropdown lists are maintained, any additional person records that are referenced beyond those found in the attribute's default list of records will be added to the end of the dropdown list in the generated spreadsheet that contains the processed values.

Location Values

The location will be defined by the spatial feature.

Entering Comments

Multiple comments can be entered for an attribute by inserting a line break in a comments column. This is done by using alt-enter.

Related Tasks:

- Configure Survey Options
- Import Observations from Geodatabase Recordset
- ESRI’s Simple Data Loader
- ESRI’s Object Loader

Import Observations from Geodatabase Recordset

It is recommended that you perform a test before you import a geodatabase recordset. This will enable you to catch mistakes that may otherwise lead to erroneous person records being created. After performing a test, download the processed geodatabase xml workset to preview how the data will be processed. If you need to make any data corrections, you may do so in the processed geodatabase xml workset.

Be aware that a test will not catch all data mistakes. It will detect data format errors, search values that cannot be resolved and required attributes that are missing a value. However, certain mistakes cannot be detected until an attempt is actually made to insert an observation. This includes range checks for numeric values, as well as date range restrictions such as disallowing future observation dates.

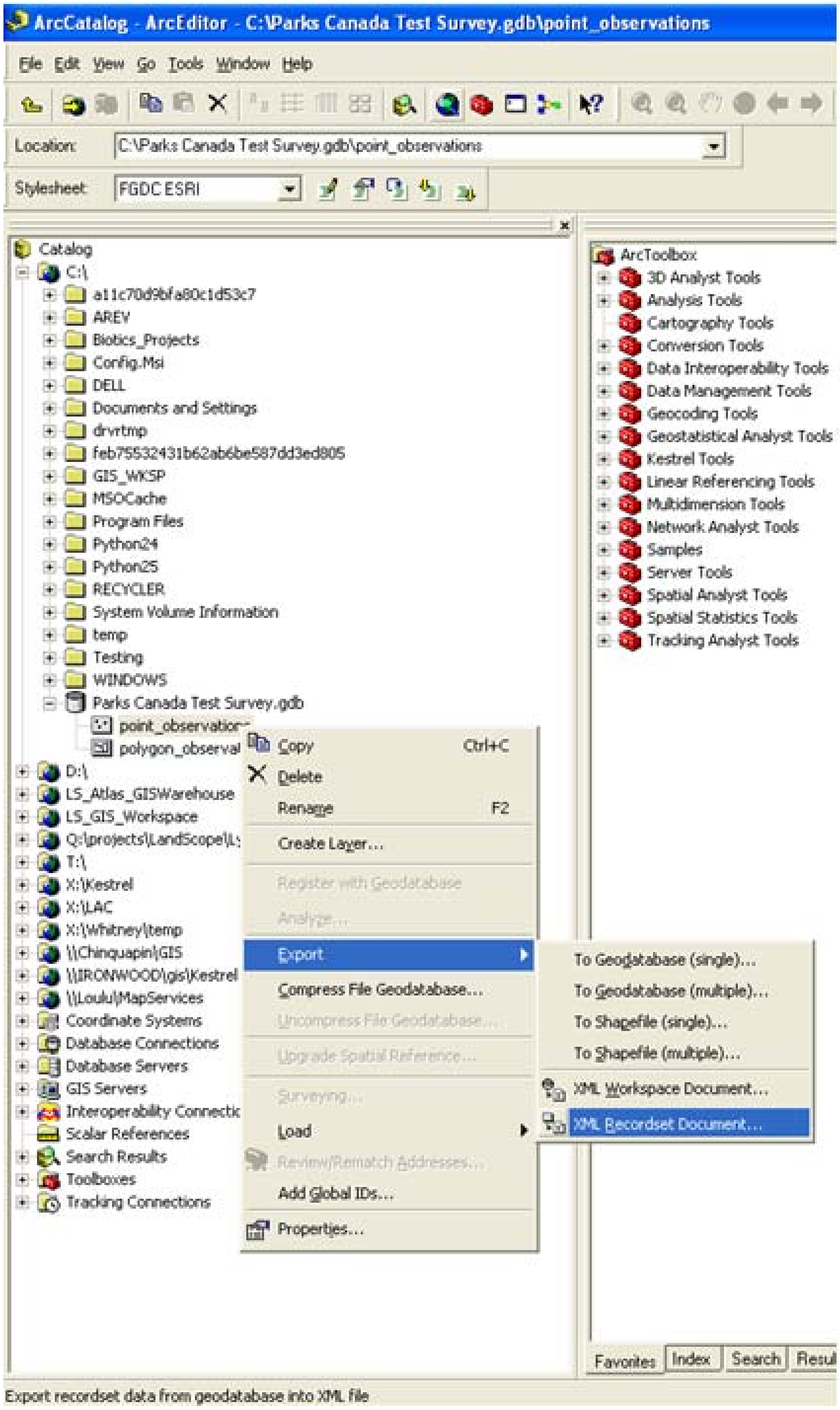
Be aware that new locations and person records are entered before an observation is saved. Therefore, new person records and locations may be added to the system even if an observation record cannot be processed.

Geodatabases being imported cannot be larger than 15 megabytes.

Finally, after you import observations, immediately download the processed geodatabase xml workset and use it for tracking new observations in the survey. This should be used to prevent data duplication as any record with a Kestrel ID in the spreadsheet will not be imported. This Kestrel ID will also allow for updates to be made to an observation in a future version of Kestrel. Data updates are not available in the current version.

1. In ArcCatalog, expand the geodatabase into which you’ve loaded/entered data.
2. Select the feature class (ie. point_observations) you would like to import as Observations into Kestrel (repeat if more than one).
3. Right click on the feature class (ie. point_observations), select **Export** and **XML Recordset Document**.

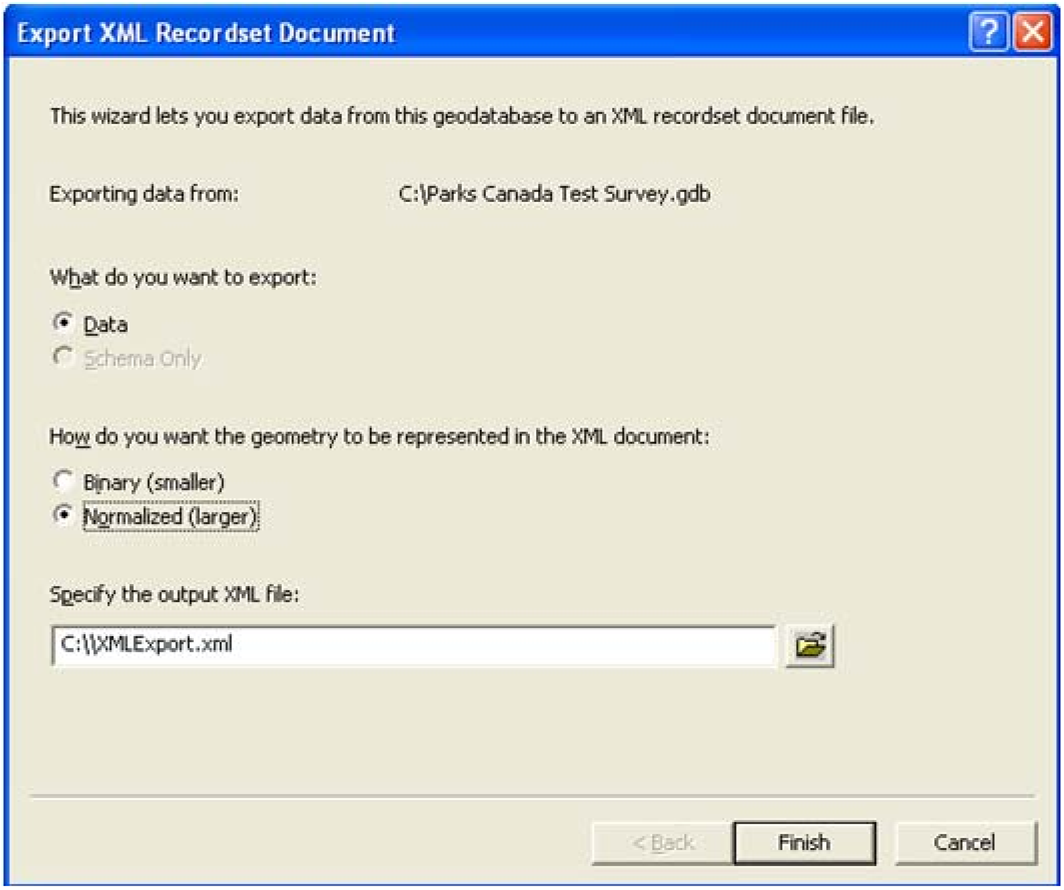
   NOTE: Exporting to an XML Recordset Document requires an ArcEditor license. The option will be grayed out if you do not have the appropriate license.



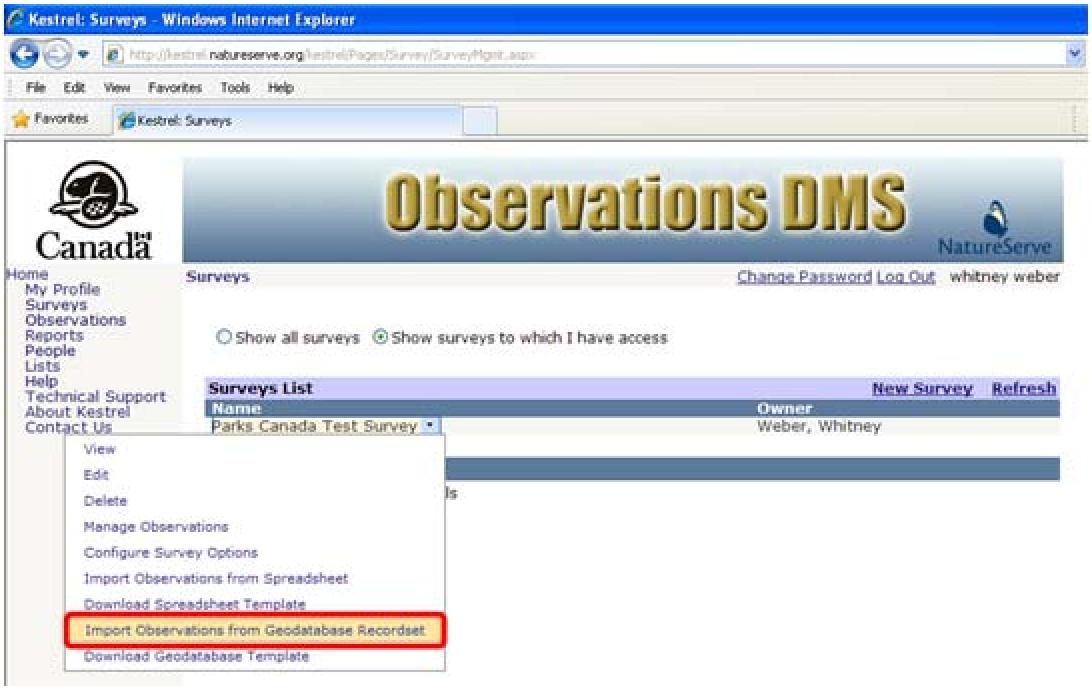
4. Within the *Export XML Recordset Document* window, select **Normalized (larger)** and browse to the location where you would like to save the output XML file. Click **Finish**.

NOTE: Failing to select Normalized (larger) will result in the following error when importing the Recordset:

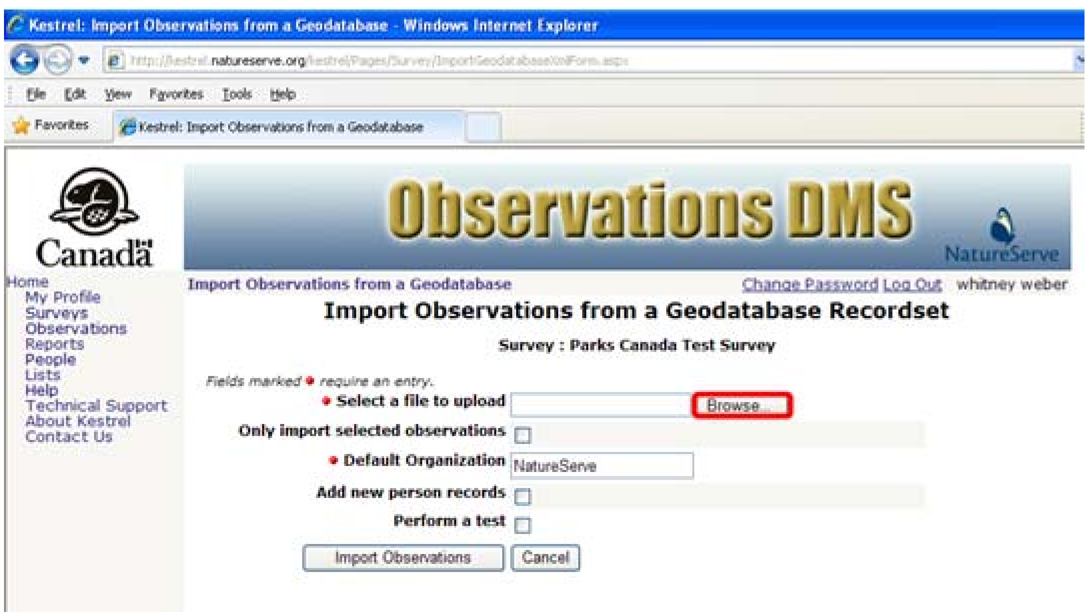
An error occurred while processing the uploaded file: A record uses a geometry type (PointB) that is different than the expected value of PointN. Be sure that your exported recordset is using normalized geometry and not binary geometry, as it is a common cause for this error.



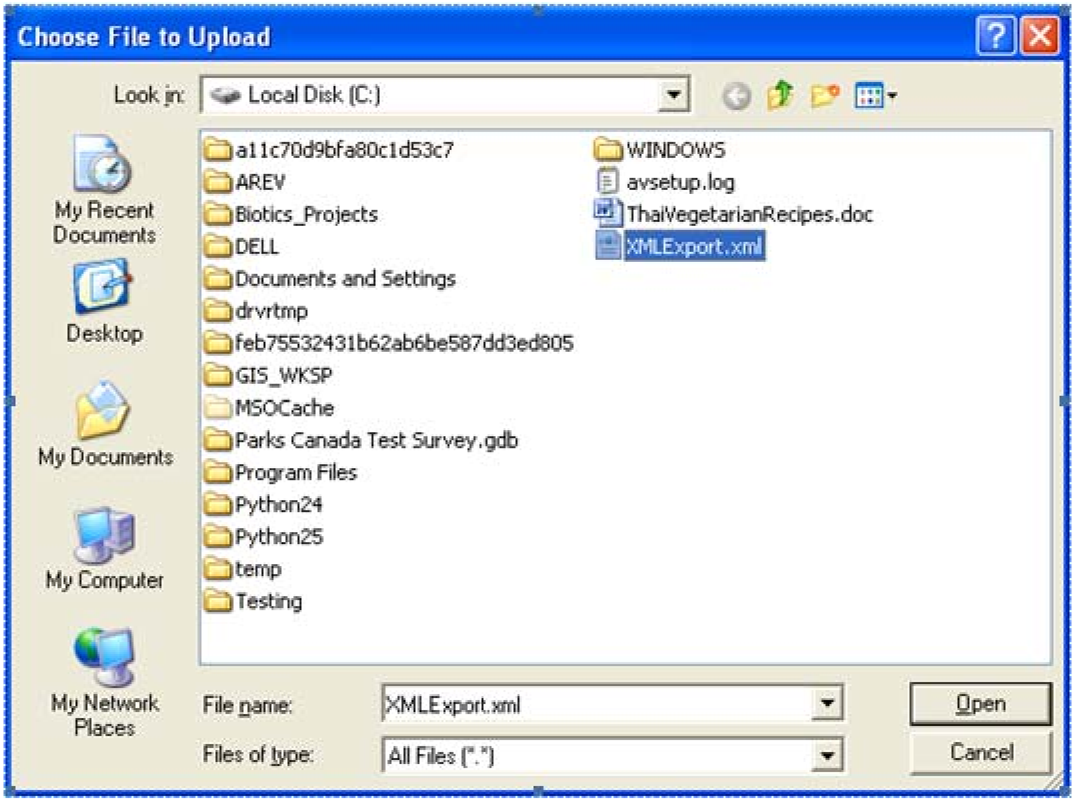
5. In Kestrel, within the *Surveys* page, click on the desired survey into which to import the observations and choose **Import Observations from Geodatabase Recordset**.



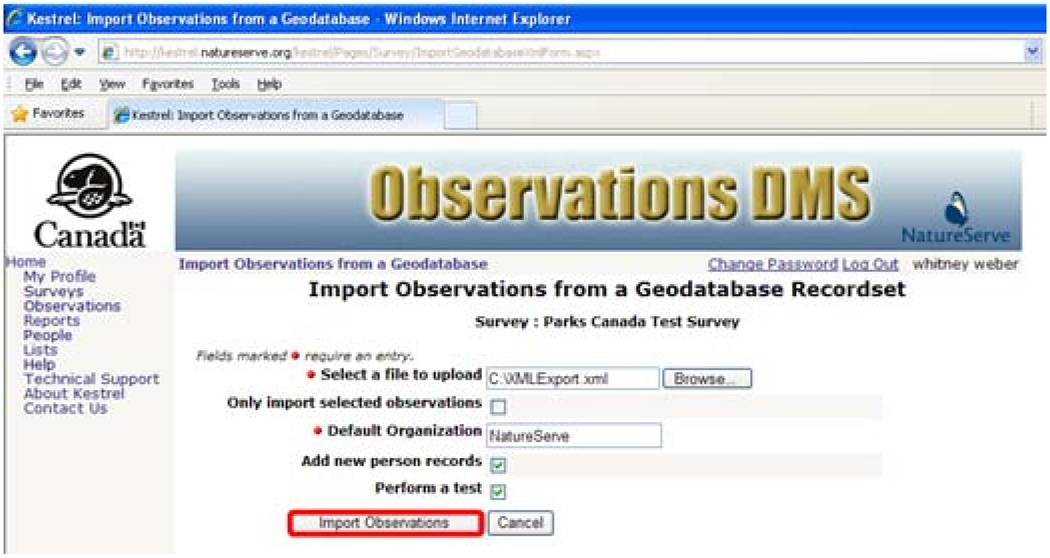
6. Click on **Browse** to browse to the XML Recordset Document from which to import the observations.



7. In the *Choose File* window, navigate to the XML Recordset Document from which to import the observations, select it and click **Open**.



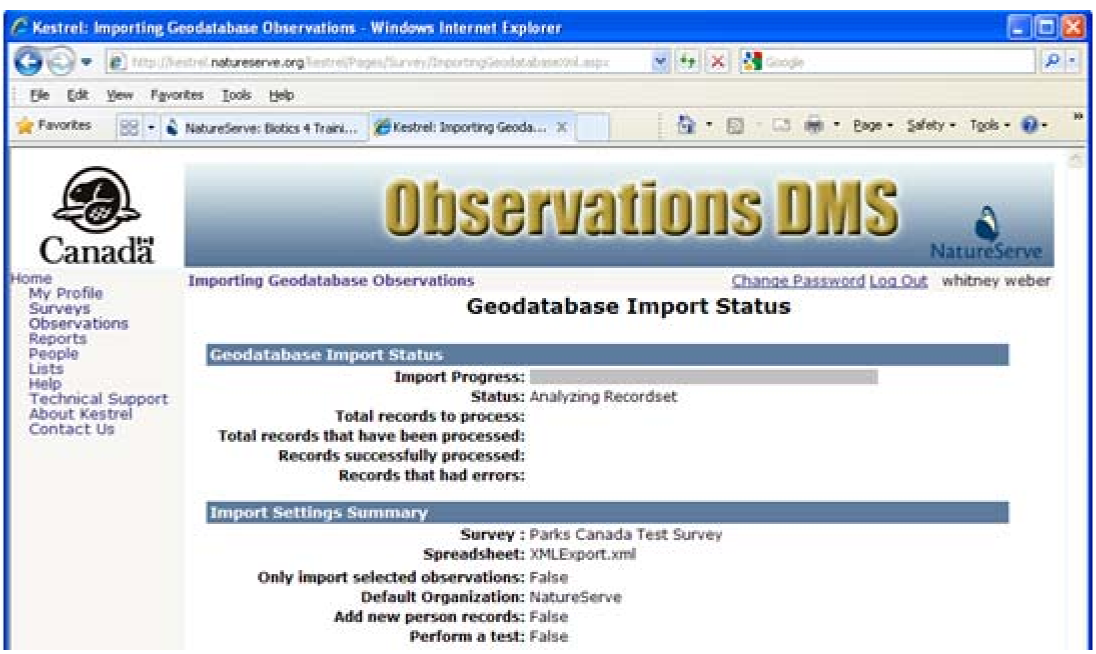
8. Complete the remaining import options, detailed below, as applicable prior to clicking **Import Observations** or **Cancel**.
    - **Only import selected observations:** If checked, only observations that are specifically flagged will be imported. If unchecked, all observations without a Kestrel ID value will be imported.
    - **Default Organization:** If not specified within the spreadsheet data, this value is used when searching for or creating new person (Primary Observer) records.
    - **Add new person records:** If checked, new person records will be created if a matching person cannot be found. If unchecked, new person records will not be inserted and an error will be raised.
    - **Zone (for UTM coordinates):** Default zone to be used for any location coordinates entered in UTM format, if not otherwise specified in import spreadsheet.
    - **Datum:** This datum will be used for all location coordinates. WGS84 is equivalent to NAD83 for the purposes of Kestrel.
    - **Perform a test:** If checked, the uploaded spreadsheet will be processed, but new records will not be inserted. This will let you preview what will happen and allow you to adjust your spreadsheet accordingly.



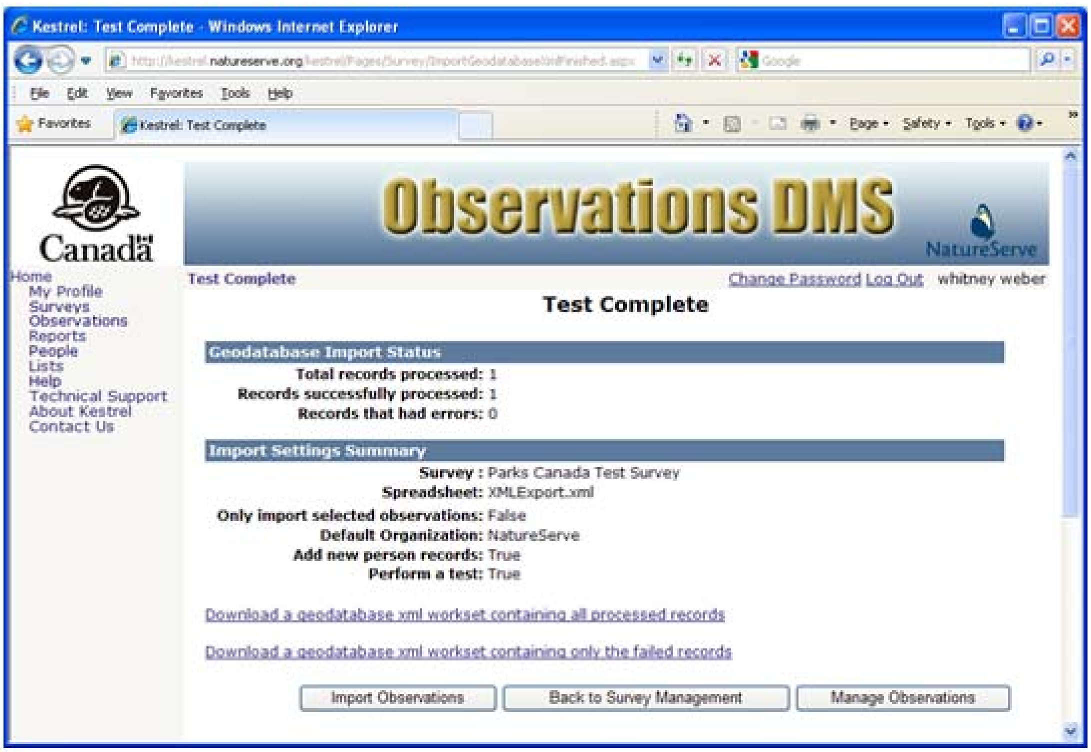
9. During the import process, the *Status* page will be entitled **Geodatabase Import Status** or **Geodatabase Test Status** to indicate the progress of the import/test according to your selection criteria on the *Import Observations* page.

NOTE: If you failed to export the XML Recordset Document as Normalized (larger) you will receive the following error:

An error occurred while processing the uploaded file: A record uses a geometry type (PointB) that is different than the expected value of PointN. Be sure that your exported recordset is using normalized geometry and not binary geometry, as it is a common cause for this error.



10. Once the import has completed, the results of the test/import will be reported on the *Test Complete* or *Import Complete* page, according to whether you chose to **Perform a test**. Your choices include:
    - **Download a geodatabase xml workset containing all processed records** to review both imported and failed rows.
    - **Download a geodatabase xml workset containing only the failed records** to review only the rows that failed import.
    - **Import Observations** to return to the *Import Observations* webpage in order to either import the spreadsheet (in cases where a test was performed) or perform another test.
    - **Back to Survey Management** to return to the *Survey Management* webpage.
    - **Manage Observations** to view the survey into which you imported records. **NOTE:** If you chose to perform a test, your records will not have been imported into the survey.

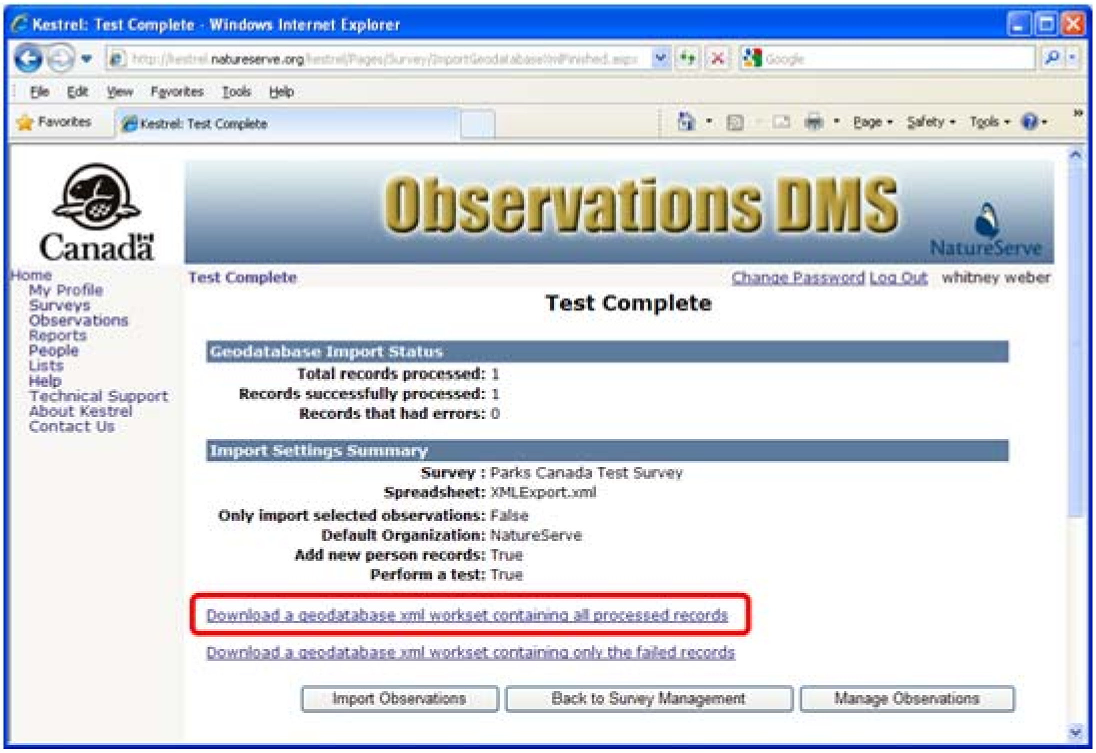


Related Tasks:

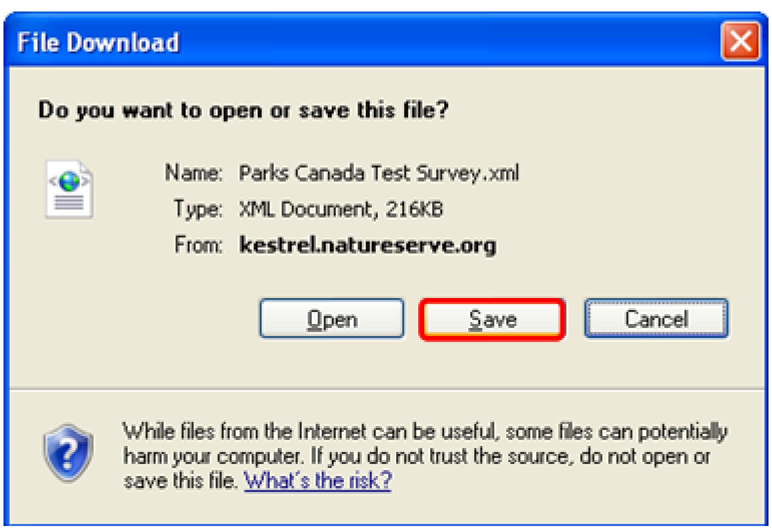
- Configure Survey Options
- Download Geodatabase Template
- ESRI's Simple Data Loader
- ESRI's Object Loader
- Download Processed Geodatabase XML Workset

Download Processed Geodatabase XML Workset

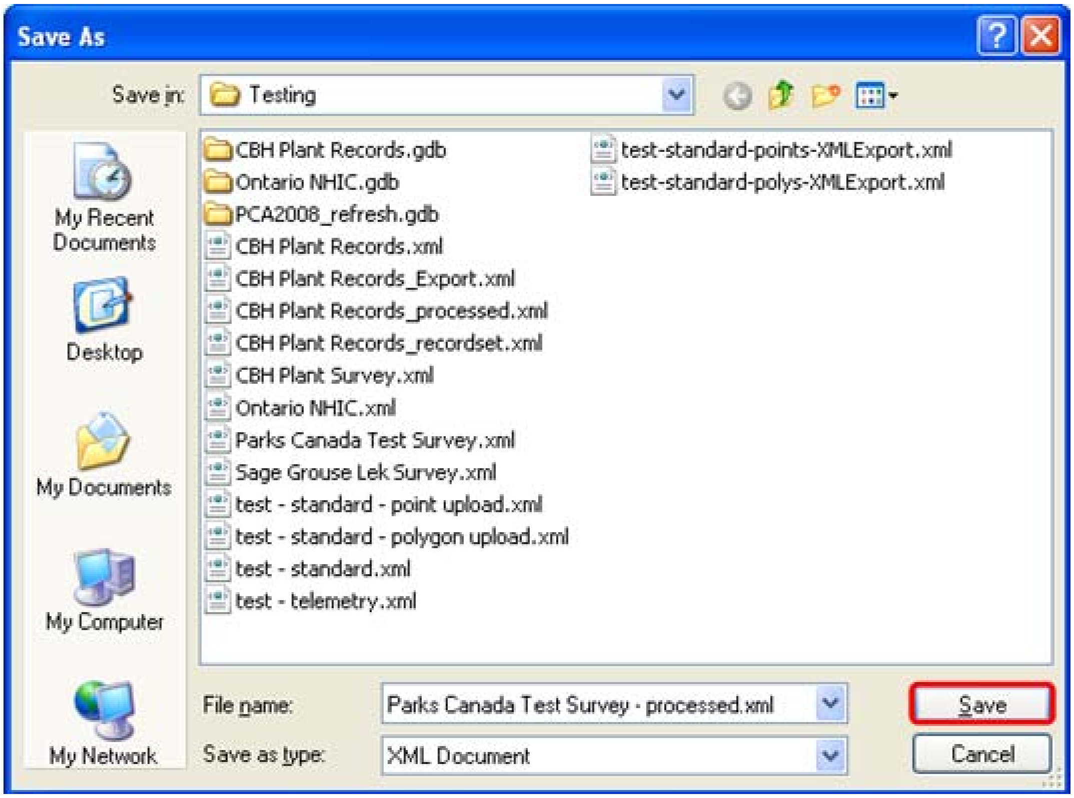
1. Within the *Test/Import Complete* page, select to **Download a geodatabase xml workset containing all processed records** to review both imported and failed rows.



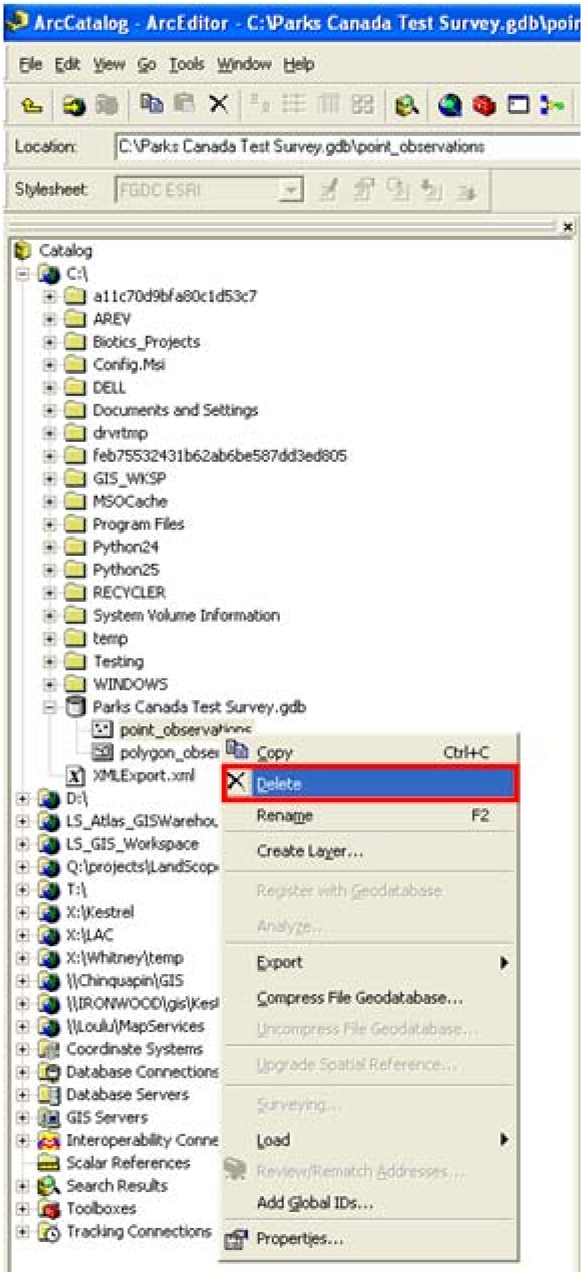
2. Choose to **Save** the file.



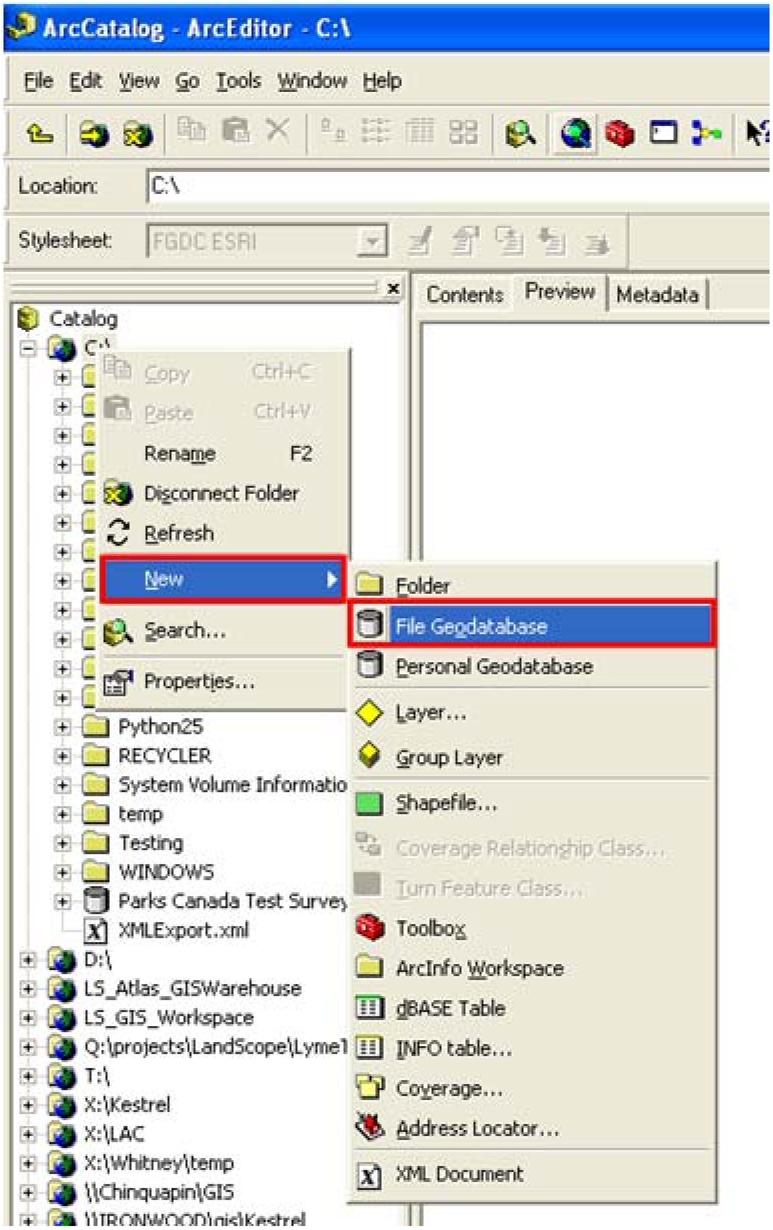
3. Within the *Save As* window, navigate to where you would like it saved and name it as desired.



4. In ArcCatalog, you can either:
   - Delete the feature sets (ie. point_observations and polygon_observations) from the existing geodatabase by right clicking on each of the feature sets and choosing **Delete**.

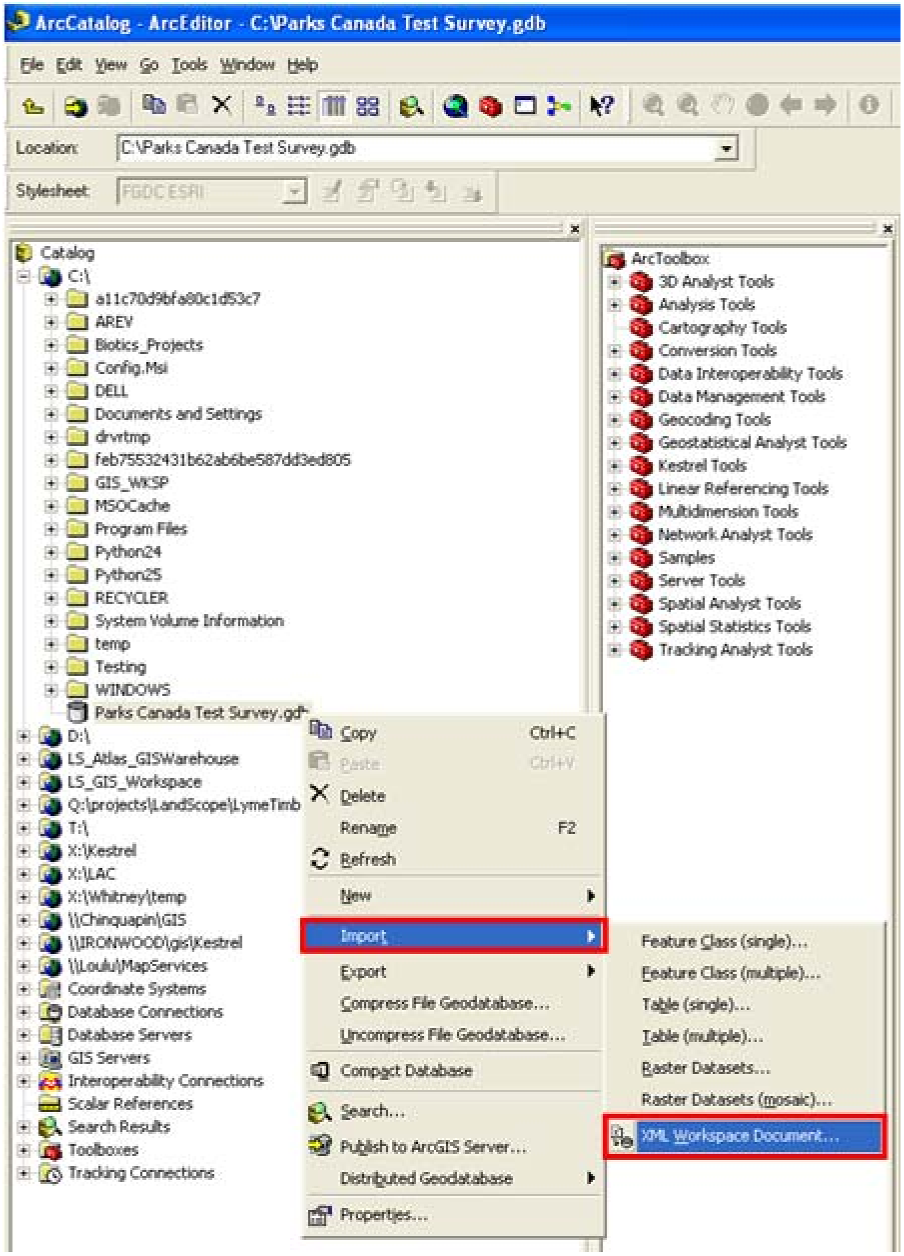


- Create a new geodatabase to hold the processed records. To do so, right click on the directory where you would like to create the new geodatabase and choose **New**, **File Geodatabase** (either File or Personal Geodatabase). Rename the file as desired.

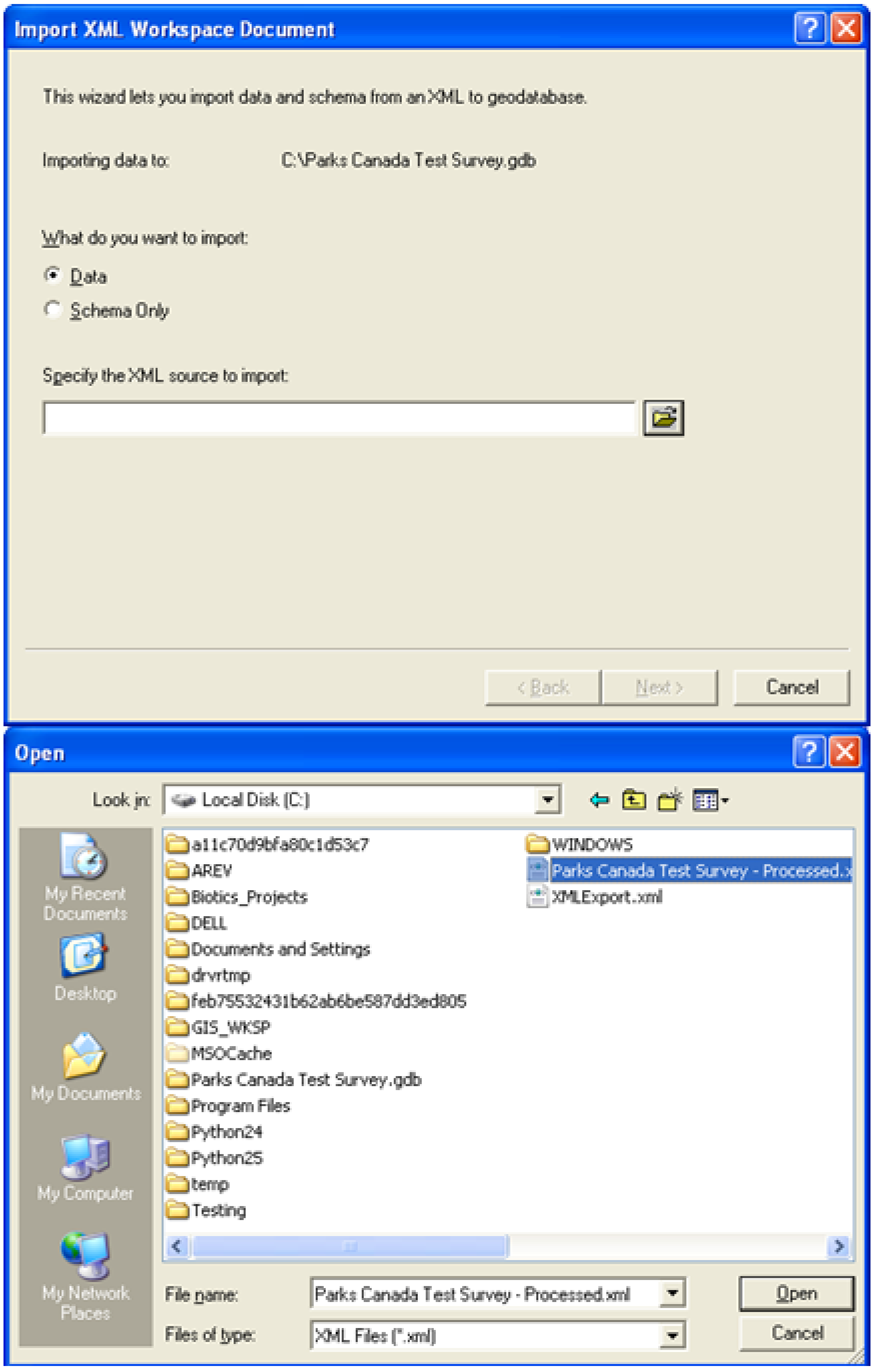


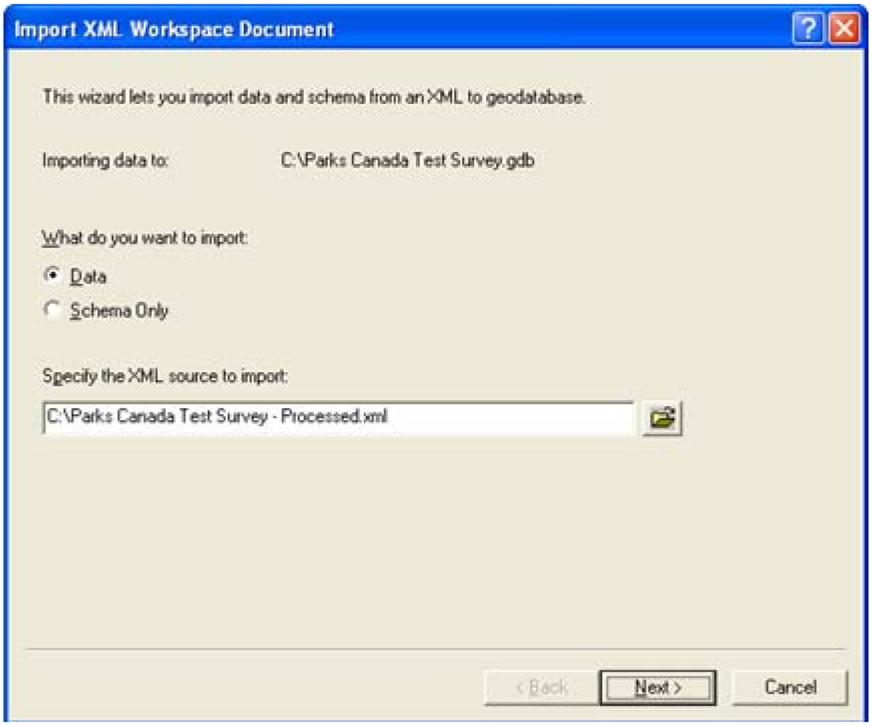
5. Right click on the geodatabase into which you will import the processed geodatabase xml workset and choose **Import**, **XML Workspace Document**.

NOTE: Importing an XML Workspace document requires an ArcEditor license. The option will be grayed out without the appropriate license.

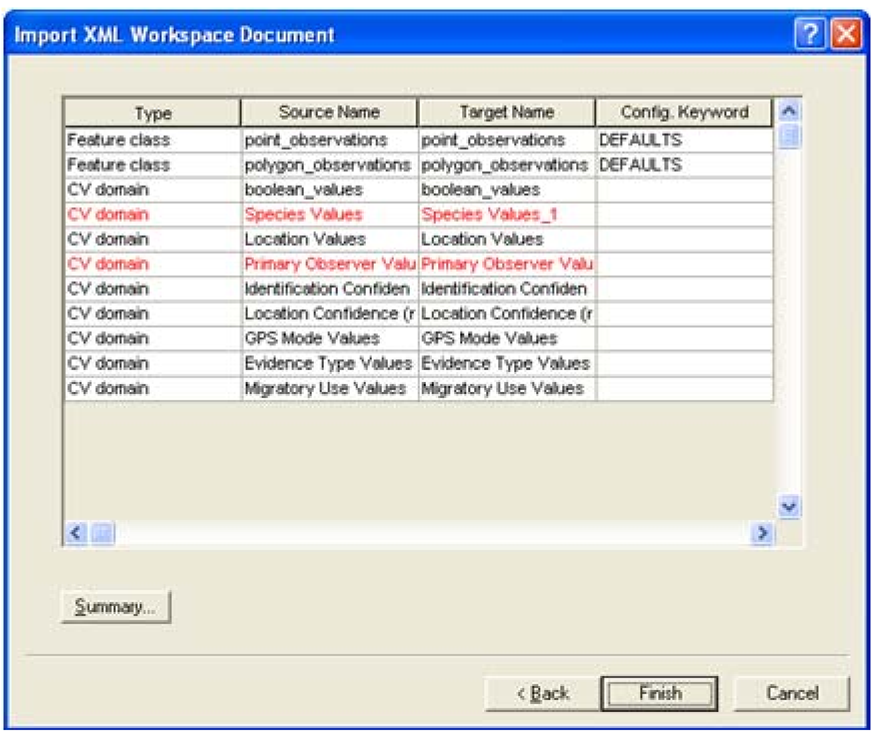


6. In the Import *XML Workspace Document* window, select **Data** and browse to where you saved the xml in Step 2 and click **Next**.

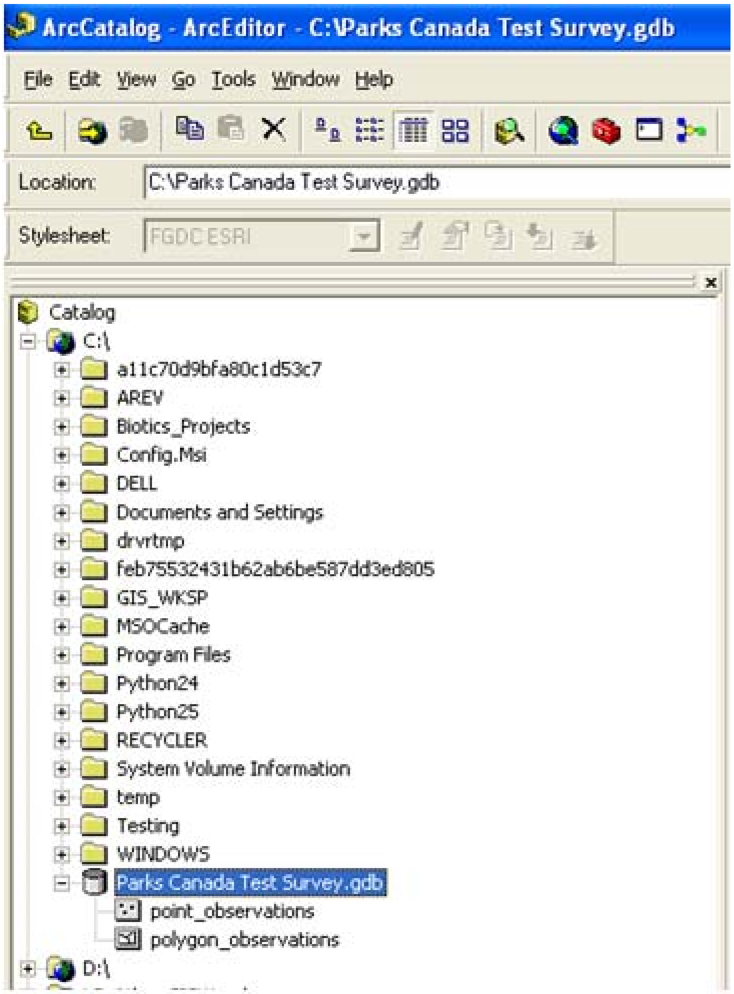

Import XML Workspace Document
This wizard lets you import data and schema from an XML to geodatabase.
Importing data to:
C:\Parks Canada Test Survey.gdb
What do you want to import:
Data
Schema Only
Specify the XML source to import:
< Back
Next >
Cancel
Open
Look in:
Local Disk (C:)
My Recent Documents
Desktop
My Documents
My Computer
My Network Places
a11c70d9bfa80c1d53c7
AREV
Biotics_Projects
DELL
Documents and Settings
drvrtmp
feb75532431b62ab6be587dd3ed805
GIS_WKSP
MSOCache
Parks Canada Test Survey.gdb
Program Files
Python24
Python25
temp
Testing
WINDOWS
Parks Canada Test Survey - Processed.x
XMLExport.xml
File name:
Parks Canada Test Survey - Processed.xml
Files of type:
XML Files (*.xml)
Open
Cancel



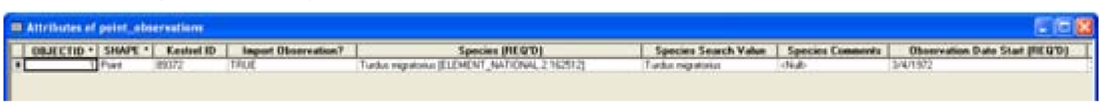
7. In the next window, choose **Finish**.



8. The geodatabase schema will be imported and is ready for review in either ArcCatalog or review/use in ArcMap:



9. Within the processed geodatabase xml workset:



- **Kestrel ID:** this column will be populated for rows that successfully passed the test (as indicated by &ldots;NEW_OBS_#) or were imported (as indicated by &ldots;observation?id=#).
- **Import Observations:** If in the Import Observations page, you had indicated to Only import selected observations, this field will be depopulated for any row which succeeded.
- **Species (REQ'D):** this column is populated with a scientific or common name, depending on the user's settings, followed by the identifying code within the species database. If the species provided within the original spreadsheet is not matched directly but as a synonym to one within the species database, then the scientific/common name followed by the identifying code of the synonym will be used. The original value will be entered as a comment for the attribute.

- **Errors:** this column is populated with the reason for which a record did not successfully import. The data must be rectified prior to re-importing or reperforming a test.'

Related Tasks:

- Import Observations from Geodatabase Recordset

ESRI's Simple Data Loader

From ESRI Online Help: The Simple Data Loader wizard in ArcCatalog allows you to specify a number of source tables and feature classes, provided their schemas match. It also allows you to specify which fields in the input data are loaded into which fields of the target feature class or table. The wizard also gives you the option of loading all the source data into a subtype of the target and lets you specify a query to limit the features

you load.

How to load data in ArcCatalog:

1. ***Data sets must be projected to GCS WGS 1984 before loading into a geodatabase downloaded from Kestrel***.
2. Right-click the table or feature class in the Catalog tree into which you want to load data, point to **Load**, and click **Load Data**.
3. Click **Next** on the introductory panel.
4. Browse to the input feature class or table.
5. Click **Add** to add the table or feature classes to the list of source data.
6. Repeat steps 3 and 4 until you have specified all the source data.
7. Click **Next**.
8. Click the first option and skip to step 10 if you do not want to load data into a specific subtype of the target.
9. Click the second option if you want to load data into a specific subtype.
10. Click the drop-down arrow and click the subtype into which you want to load the source data.
11. Click **Next**.
12. Click the drop-down arrow in the **Matching Source Field** list and click the field from the source data that you want to match to the target field.

    Leave the **Matching Source Field** as **<None>** if you don't want data from a field in the source data to be loaded into the target data.
13. Repeat step 11 until you have matched all the fields you want to load from your source data.
14. Click **Next**.
15. Click the first option and skip to step 19 if you want to load all the source data.
16. Click the second option if you want to limit the features from the source data loaded into the target using an attribute query.
17. Click **Query Builder** to open the Query Builder dialog box.
18. Use the Query Builder to create a query to limit the features or rows from the source data that are going to be loaded into the target.
19. Click **OK**.
20. Click **Next**.

21. Review the options you have specified for loading your data. If you want to change something, you can go back through the wizard by clicking **Back**.
22. Click **Finish** to load your data when satisfied with your options.

Tips

- When matching fields, you can browse the source data’s field values to help you correctly match the source and target fields.
- The Simple Data Loader can't be used with some types of nonsimple feature classes, including
    - Network feature classes
    - Feature classes with feature-linked annotation
    - Origin feature classes in composite relationships
    - To load data into these types of feature classes, use the Object Loader.

Related Tasks:

- Configure Survey Options
- ESRI’s Object Loader
- Download Geodatabase Template
- Import Observations from Geodatabase Recordset

ESRI's Object Loader

From ESRI Online Help: The Object Loader wizard in ArcMap allows you to specify a number of source tables and feature classes, provided their schemas match. It also allows you to specify which fields in the input data are loaded into which fields of the target feature class or table. In addition, the wizard lets you specify a query to limit the features loaded.

Some tips about the Object Loader:

- If the feature coordinates you're loading are not precisely located, you can choose to honor the current snapping environment, snapping coordinates as they load.
- If you're loading into a feature class that has validation rules, such as attribute domain or geometric network connectivity rules, you can create a selection of the loaded features that are in violation of these rules.
- If you're loading into a network feature class, ArcMap builds connectivity for you as each feature is added.
- If you're loading into a feature class that has feature-linked annotation, ArcMap adds a record to the linked annotation feature class as each feature is added.

Adding the Load Objects command to ArcMap

1. Click **View**, point to Toolbars, and click **Customize**.
2. Click the **Commands** tab.
3. In the **Categories** list, click **Data Converters**.
4. Drag and drop the **Load Objects** command from the **Commands** list onto the **Editor** toolbar. The command appears on the toolbar.
5. Click **Close**.

Loading data with the Load Objects command

1. ***Data sets must be projected to GCS WGS 1984 before loading into a geodatabase downloaded from Kestrel***.
2. Add your data to ArcMap, click **Editor**, then click **Start Editing**.
3. Click the **Target layer** drop-down arrow and click the feature class or subtype into which you want to load data.
4. Click **Load Objects**.
5. Browse to the source feature class.
6. Click **Add** to add it to the list of source data.
7. Repeat steps 4 and 5 until you have specified all the source data.
8. Click **Next**.
9. Click the drop-down arrow in the **Matching Source Field** list and click the field from the source data you want to match to the target field. Leave the **Matching Source Field** as **<None>** if you don’t want data from a field in the source data to be loaded into the target data.

10. Repeat step 8 until you have matched the fields you want loaded from your source data.
11. Click **Next**.
12. Click the first option and skip to step 16 if you want to load all the source data.
13. Click the second option if you want to limit the features from the source data to load into the target using an attribute query.
14. Click **Query Builder** to open the Query Data dialog box.
15. Create a query to limit the features or rows from the source data to be loaded into the target.
16. Click **OK**.
17. Click **Next**.
18. Click **No** if you don't want your features to be snapped to existing features in your edit session.
19. Click **Yes** if you want to use the current Editor snapping environment to snap the new features as they are loaded.
20. Click **No** if you don't want your new features to be validated after they are loaded.
21. Click **Yes** if the feature class or subtype into which you are loading data has rules associated with it and you want any new invalid features to be selected after the loading process.
22. Click **Next**.
23. Review the options you have specified for loading your data. If you want to change something, go back through the wizard by clicking **Back**.
24. Click **Finish** to load your data when satisfied with your options.

Tips

- If you're loading into a versioned ArcSDE feature class or table with ArcMap, the data loads into the delta tables, not the base tables. After you've finished loading into any feature class or table registered as versioned without the option to move edits to the base table, run Compress on your database to push all the records from the delta tables to the base tables. Having your data in the base tables will result in better query speed than if you have large amounts of data in your delta tables.
- The option to validate the new features applies only to the geodatabase validation rules and does not validate the topology

Related Tasks:

- Configure Survey Options
- ESRI's Simple Data Loader
- Download Geodatabase Template
- Import Observations from Geodatabase Recordset

Observations

Introduction to Observations

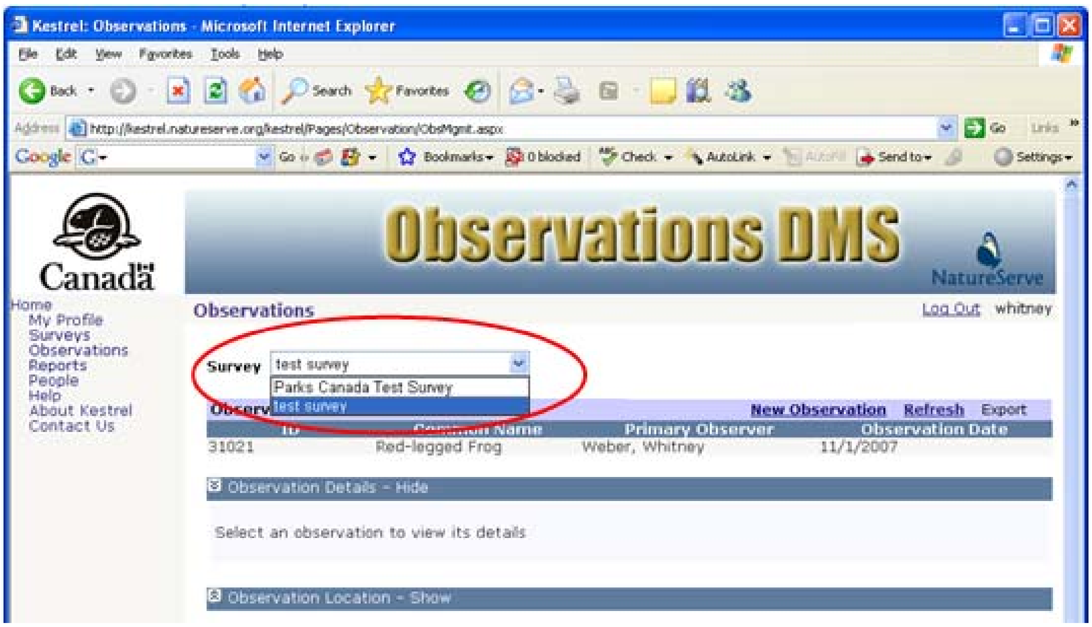
Tasks:

- Create New Observation
- Export Observations
- Import GML
- Select a Species
- Create New Location
- Edit Location
- Select Primary Observer
- View Observation
- Edit Observation
- Delete Observation
- View Survey
- Edit Survey
- Delete Survey
- View Person
- Edit Person
- Delete Person
- Use Mapping Tools

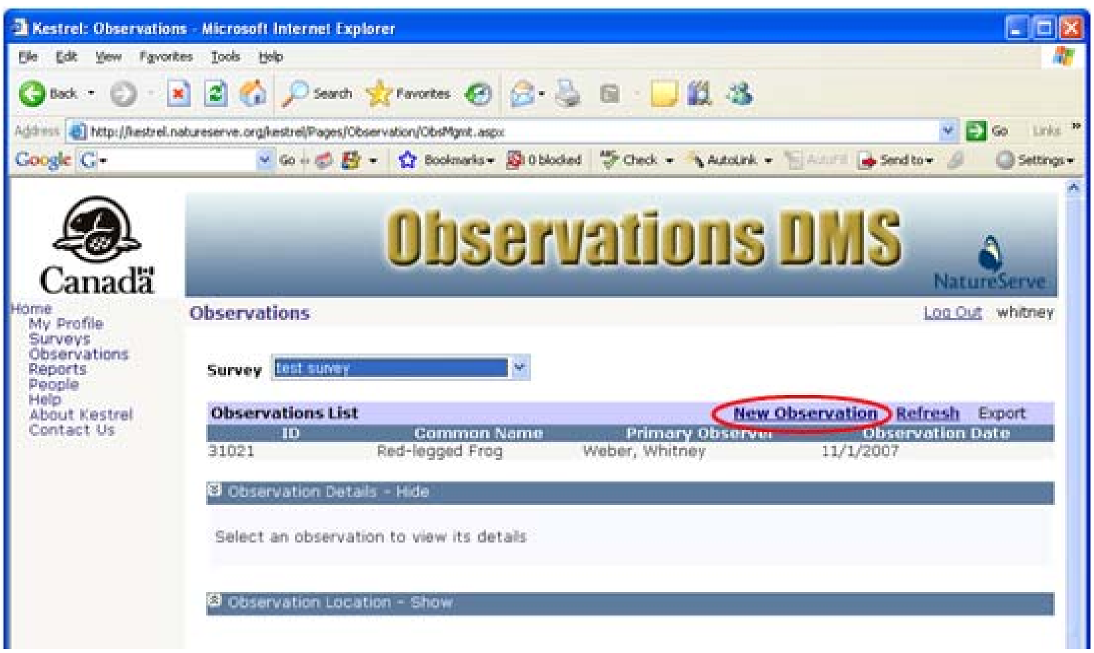
Methods of Navigation:

There are a number of ways to navigate through the *Observations* page:

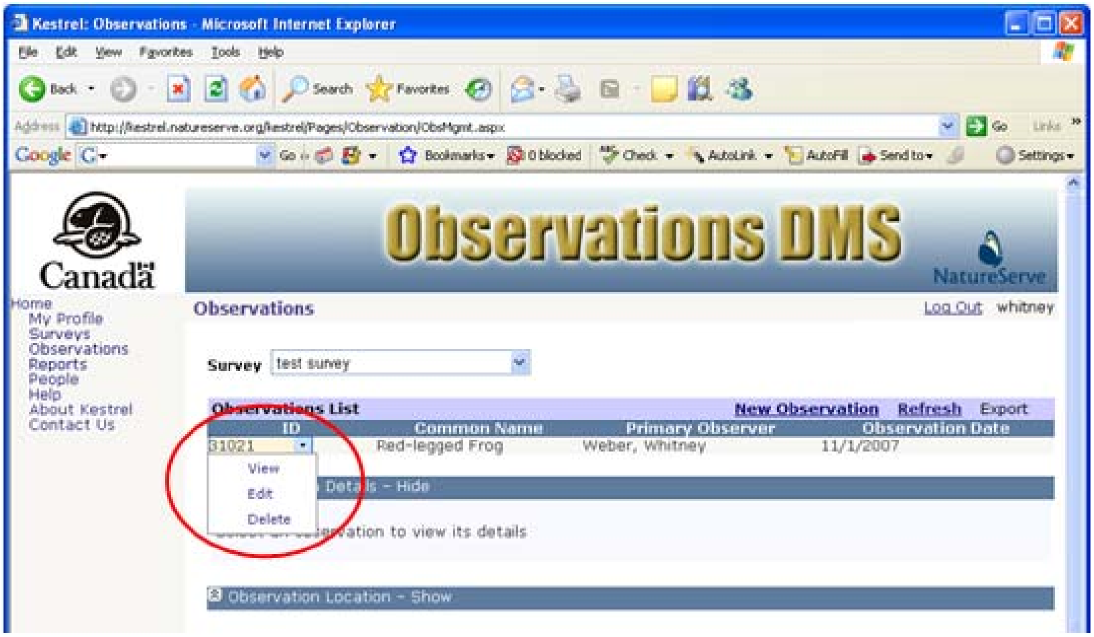
- From the **Survey** dropdown list, select the survey in which to create observations or from which to view, edit, or delete observations.



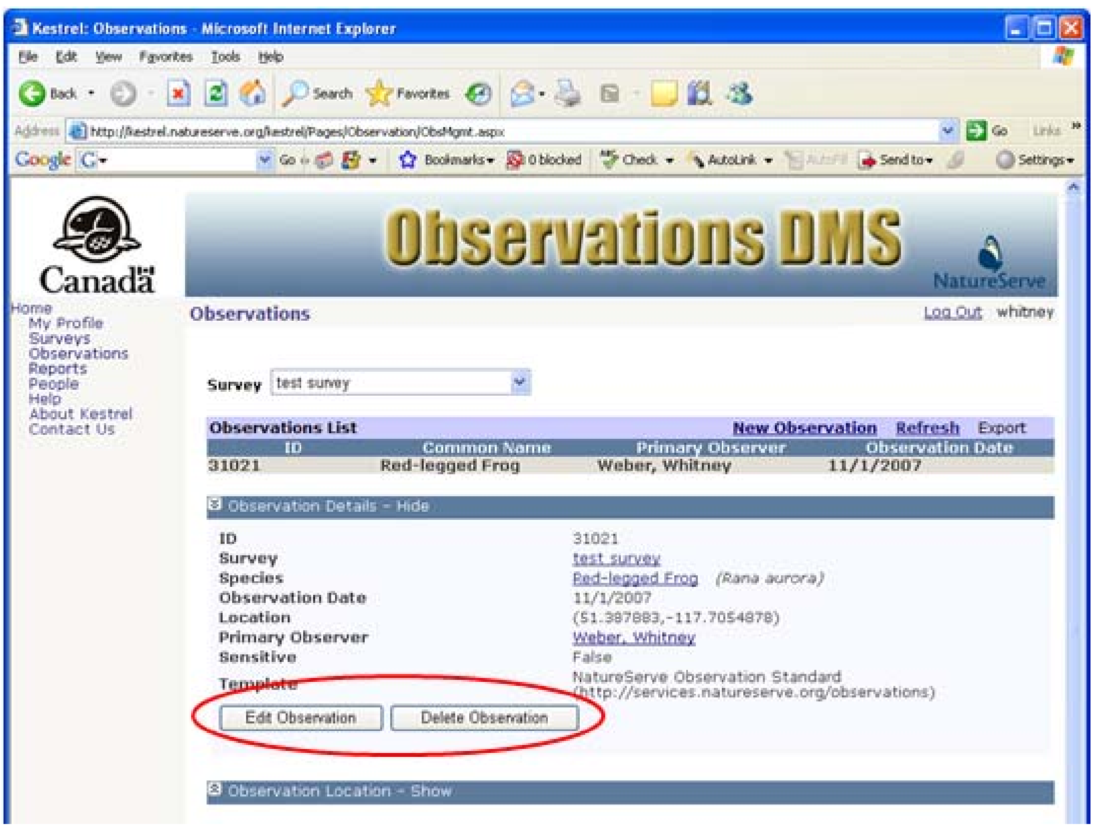
- Create a new observation by clicking on the **New Observation** button.



- Click on an observation record and from the dropdown list, choose to **View**, **Edit**, or **Delete** it.

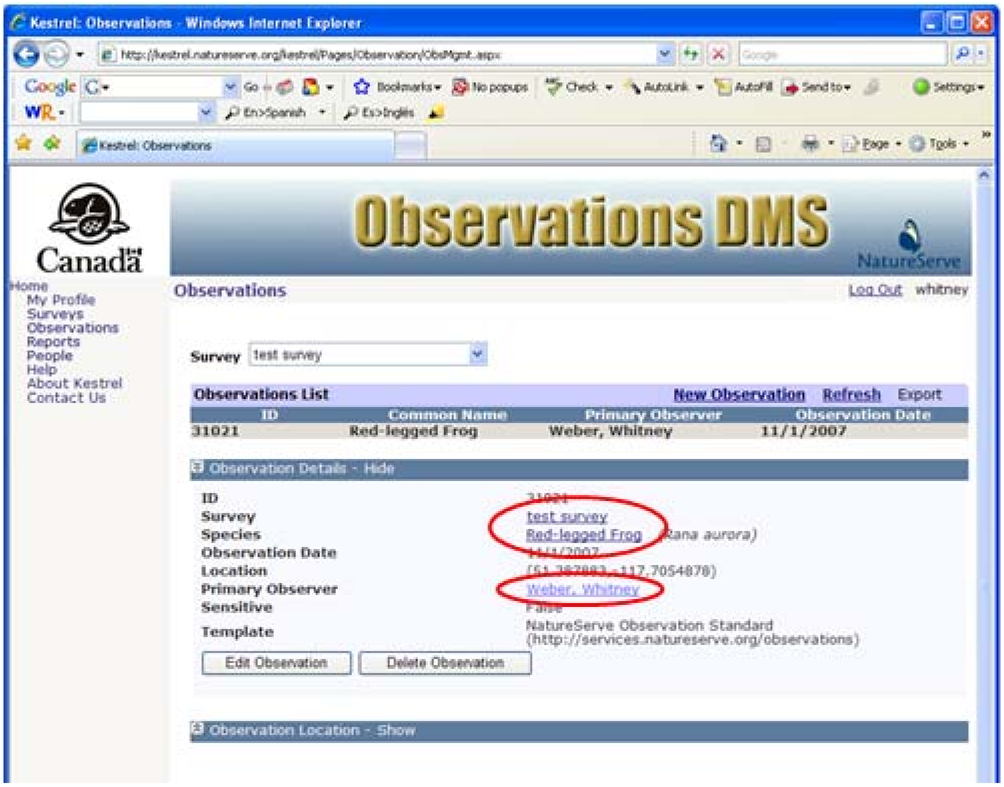


- Alternatively, **View** the observation, from which point you can **Edit** or **Delete** the record.



- From within the Observation Details section:

- click the Survey link to navigate to the *Survey Details* page.;
- click the Species link to navigate to NatureServe Explorer for further information on the species;
- click the Primary Observer link to navigate to the *Person Details* page.



Observation Attributes

The following fields are attributes of an observation:

- Template
- Survey
- Species
- Observation Date
- Location
- Primary Observer
- Sensitive
- Not Found

Observation Template

The **Template** field, as seen within the *Observation Edit* page is not editable as it is defined according to the survey to which the observation record belongs. The (Observation) Template must be defined within the *Survey Edit* page.

Page: Edit Survey
Field: Observation Template
    Database Table: SURVEY
        Column: entitydefinition_id
        AttributeDefinition_ID:
        Data Type: NUMBER
        Optionality: NOT NULL
        Default Value:
        Column linking to Parent Table: entitydefinition_id
    Foreign Key from: ENTITYDEFINITION
        Column Name: entitydefinition_id
        Display Column: entitydefinition_xml

Survey

Unique name that identifies the survey.

The **Survey** field, as seen within the *Observation Edit* page, is not editable as it is defined according to the survey to which the observation record belongs. The Survey (Name) must be defined within the *Survey Edit* page.

Page: Edit Survey
Field: Survey Name
  Database Table: SURVEY
    Column: name_s
    AttributeDefinition_ID:
    Data Type: VARCHAR2(4000)
    Optionality: NOT NULL
    Default Value:
    Column linking to Parent Table:
  Foreign Key from:
    Column Name:
    Display Column:

Species

The plant or animal that is the subject of the observation.

Select the observed species from the dropdown list or by searching the webservice via the  button.

Task:

- Select a Species

Page: Edit Observation
Field: Species
    Database Table: OBSERVATION
        Column: observedspecies_species_x
        AttributeDefinition_ID:
        Data Type: VARCHAR2(4000)
        Optionality: NOT NULL
        Default Value:
        Column linking to Parent Table:
    Foreign Key from: webservice
        Column Name:
        Display Column:

Observation Date

Day, month, and year when the observation was made.

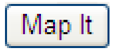
The default value when a new observation record is created is the current date. Use date range, by clicking , if precise date is not known. When a single date is entered, the start and end date values will be the same.

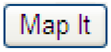
Page: Edit Observation
Field: Observation Data (Start)
  Database Table: OBSERVATION
    Column: dateofobservation_r_st
    AttributeDefinition_ID:
    Data Type: DATE
    Optionality: NOT NULL
    Default Value: (today's date)
    Column linking to Parent Table:
  Foreign Key from:
    Column Name:
    Display Column:

Page: Edit Observation
Field: Observation Data (End)
  Database Table: OBSERVATION
    Column: dateofobservation_r_nd
    AttributeDefinition_ID:
    Data Type: DATE
    Optionality: NOT NULL
    Default Value:
    Column linking to Parent Table:
  Foreign Key from:
    Column Name:
    Display Column:

Location

Location where the observation was made.

Select the named location from the dropdown list; edit the location by selecting the name from the location and by clicking the 

button; or create an Edit Location by clicking the 

button.

Related Tasks:

- Create Location
- Edit Location

Page: Edit Observation
Field: Location
  Database Table: OBSERVATION
    Column: observationlocation_location_x
    AttributeDefinition_ID:
    Data Type: NUMBER
    Optionality: NOT NULL
    Default Value:
    Column linking to Parent Table:
  Foreign Key from: LOCATION
    Column Name: location_id
    Display Column: shape

Primary Observer

Full name of the person who made the observation or who is the primary contact for information about the observation.

Task:

- Select Primary Observer

Page: Edit Observation
Field: Primary Observer
  Database Table: OBSERVATION
    Column: primaryobserver_person_x
    AttributeDefinition_ID:
    Data Type: NUMBER
    Optionality: NOT NULL
    Default Value:
    Column linking to Parent Table:
  Foreign Key from: PERSON
    Column Name: person_id
    Display Column: lastname_s & ”r;, ”r; & firstname_s

Sensitive

Check this box if the observation record is sensitive.

To be given access to sensitive observation records, the authorized user must have **Access to Sensitive Observations** within the specific Survey.

Related Tasks:

- Edit Survey

Page: Edit Observation
Field: Sensitive
Database Table: OBSERVATION
Column: sensitive_b
AttributeDefinition_ID:
Data Type: CHAR(1)
Optionality: NULL
Default Value: NULL
Column linking to Parent Table:
Foreign Key from:
Column Name:
Display Column:

Not Found

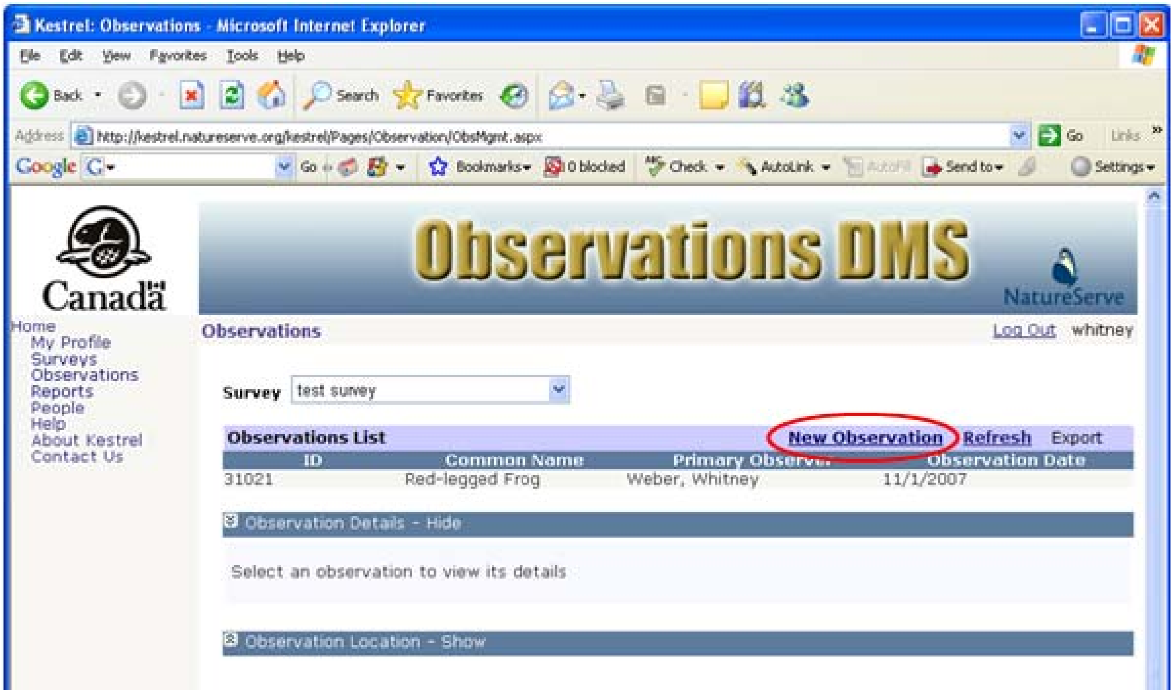
Check this box if the species was not found at the time and location of this observation.

Page: Edit Observation
Field: Not Found
    Database Table: OBSERVATION
        Column: notfound
        AttributeDefinition_ID:
        Data Type: CHAR(1)
        Optionality: NULL
        Default Value: NULL
        Column linking to Parent Table:
    Foreign Key from:
        Column Name:
        Display Column:

Tasks

Create New Observation

1. Within the *Observations* page, select the survey in which you would like to create the new observation from the **Survey** dropdown list.
2. Click **New Observation**.



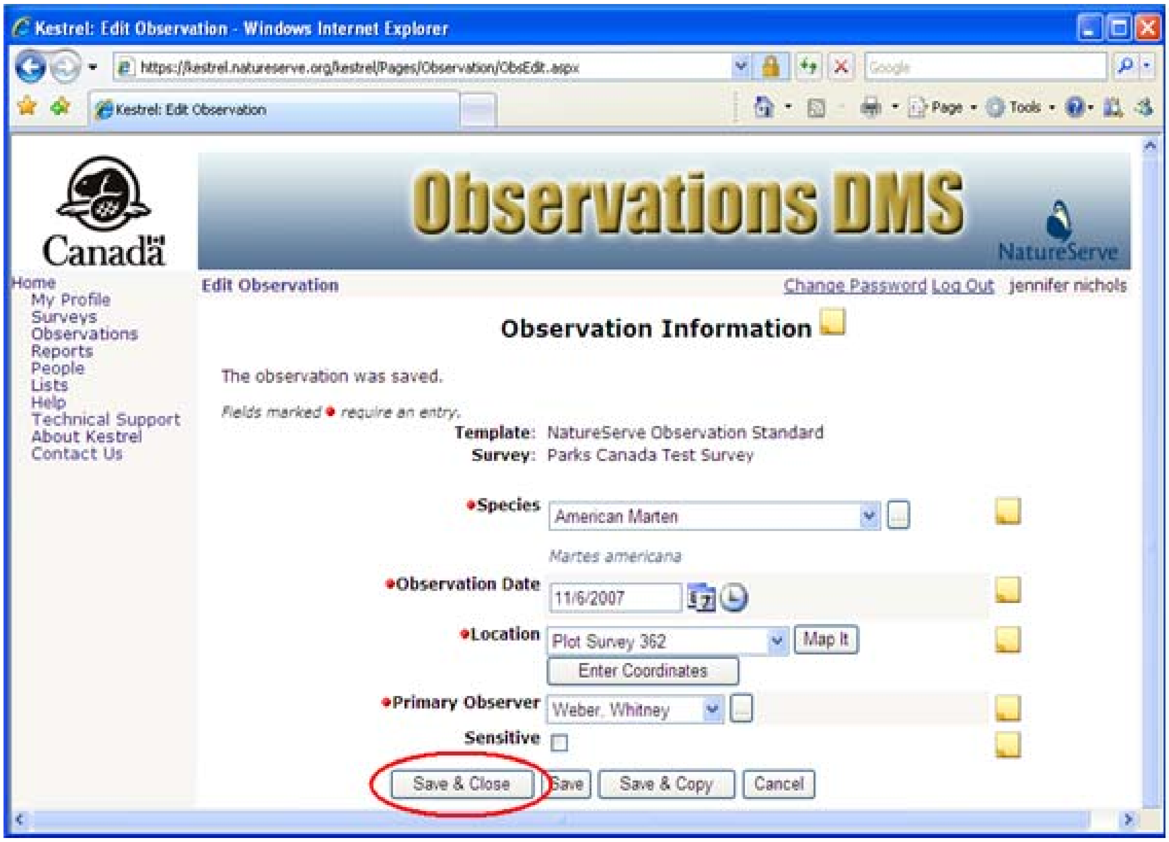
3. Within the *Edit Observation* page, fill out the various fields with appropriate information. The core fields are listed below. For further information on any of the fields, click the appropriate link below.
   - Template - Read Only
   - Survey - Read Only
   - Species - Required
   - Observation Date - Required
   - Location - Required
   - Primary Observer - Required
   - Sensitive
   - Not Found

NOTE: Additional fields are specific to the template used by the survey containing the observation record. Further information regarding these non-core fields can be determined by placing the cursor over the field name, to obtain fly-over help.

4. Click **Save & Close** to save changes to and close the observation record.

   NOTE: Other options include:

   - **Save**, which allows you to save the record but continue editing it;
   - **Save & Copy**, which will save the record, create a copy of it and open the new record.

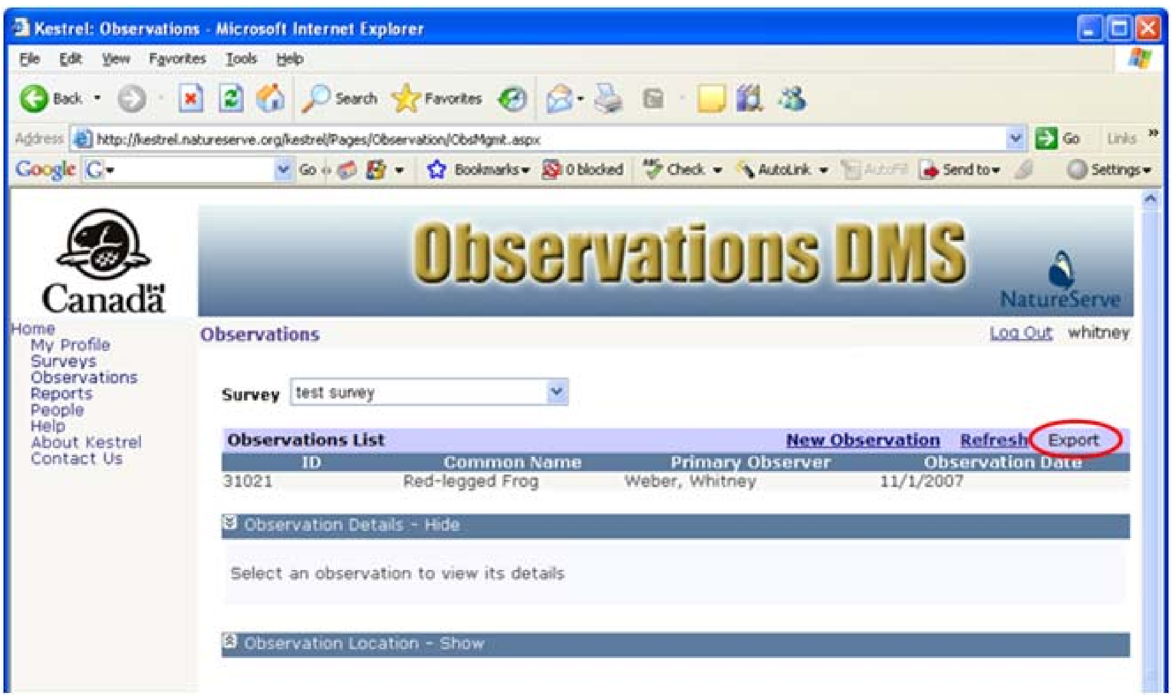


Related Tasks:

- Select a Species
- Create Location
- Name a Location
- Edit Location
- Select Primary Observer

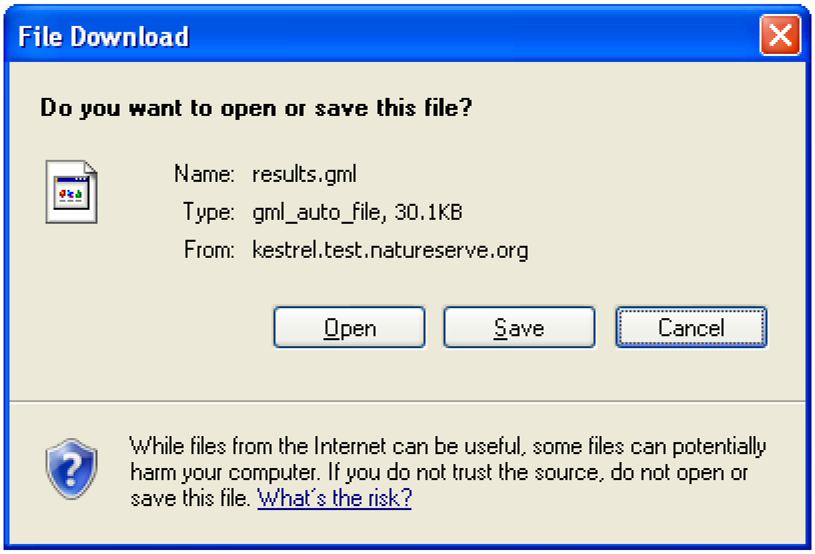
Export Observations

1. Within the *Observations* page, select the survey from which you would like to export observations from the **Survey** dropdown list.
2. Click **Export** and select the preferred format (**GML** or **CSV**) from the dropdown list.
   - **GML** - includes tabular and geographic data; can be imported into ArcCatalog to be included in map documents
   - **CSV** - tabular data only; can be imported into a number of applications, including Microsoft Excel and Microsoft Access

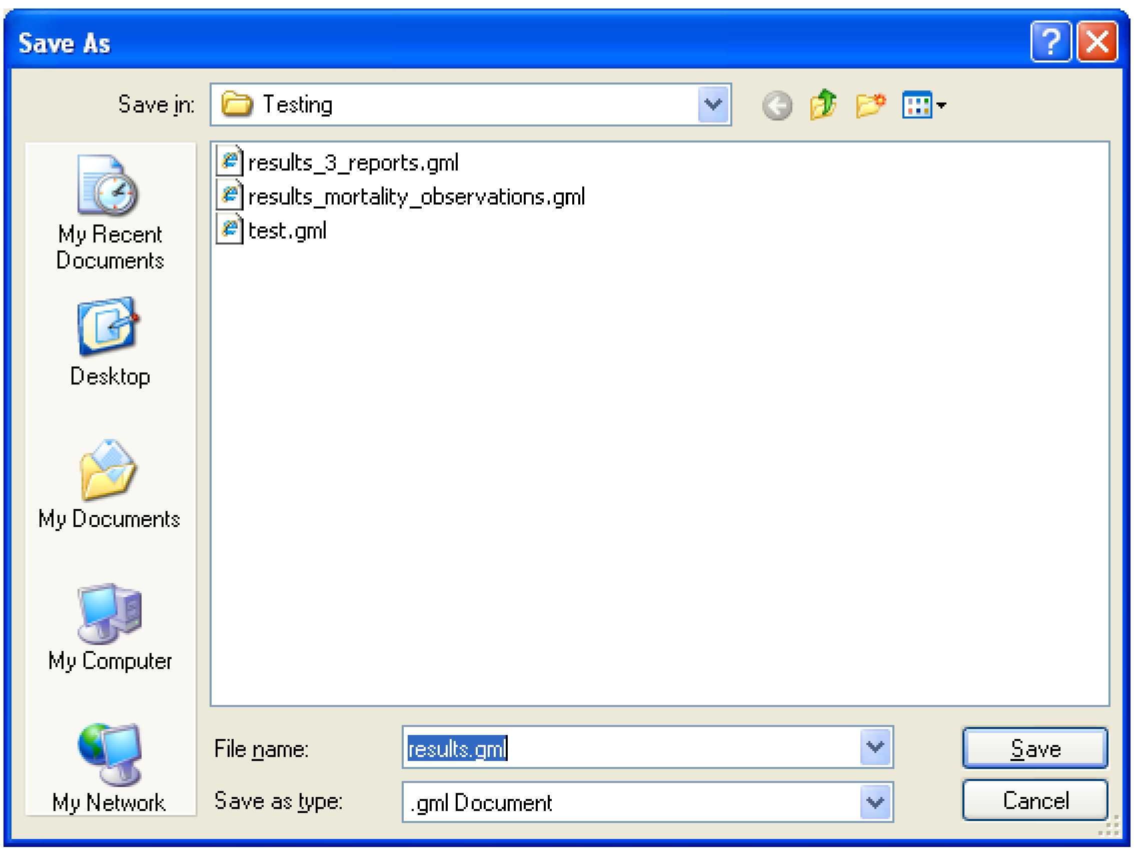


NOTE: Depending on the amount of data, the export process can take a number of minutes.

3. In the *File Download* dialog, **Save** the file.



4. In the *Save As* dialog, navigate to where you would like to save the file.
   NOTE: If ArcMap is not installed on your computer, the **Save as type** will default to a file type of .xml rather than .gml. To save the file with a .gml extension, rename the file by putting quotes around the name (ie. "filename.gml"). Doing so will result in the XML extension being dropped and the file being named filename.gml as expected.

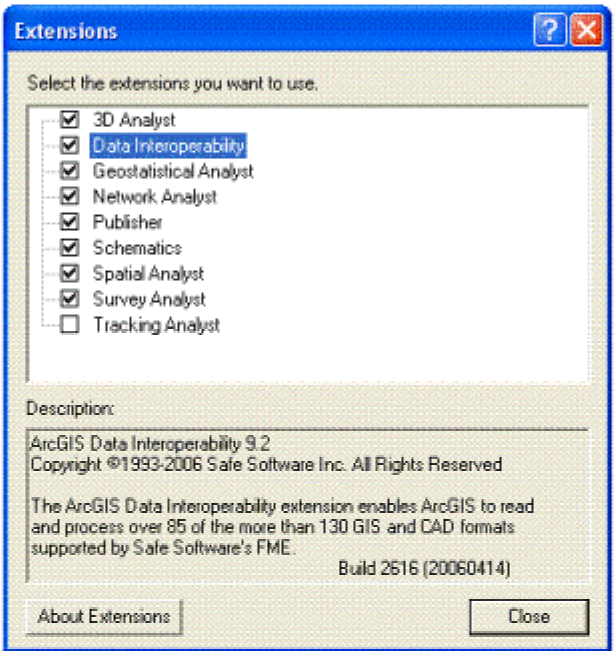


Related Tasks:

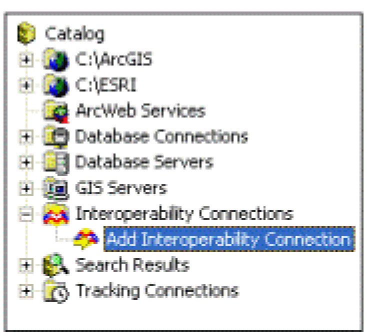
- Import GML

Import GML

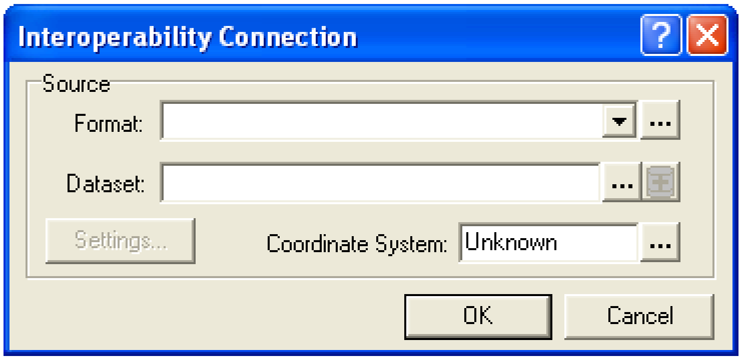
1. In ArcCatalog, enable the Data Interoperability Extension: from the Tools menu, click Extensions and ensure that you have checked on Data Interoperability.



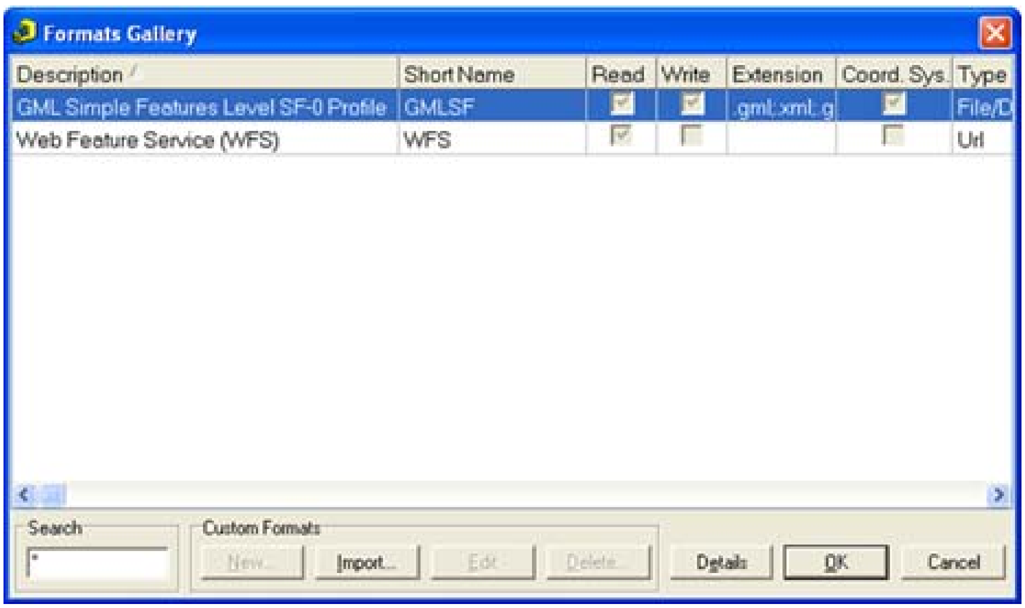
2. Add a new interoperability connection by double-clicking on "Add interoperability connection."

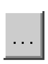


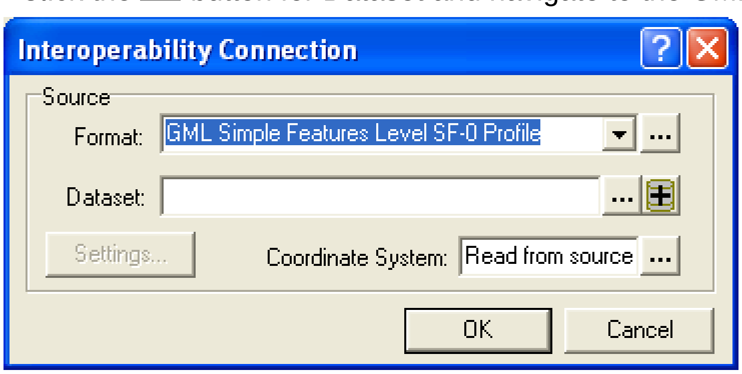
3. Click the browse.png button for Format to open the Formats Gallery.



4. Within the Formats Gallery select the GML simple features specification - **GML Simple Features Level SF-0 Profile** and click **OK**.

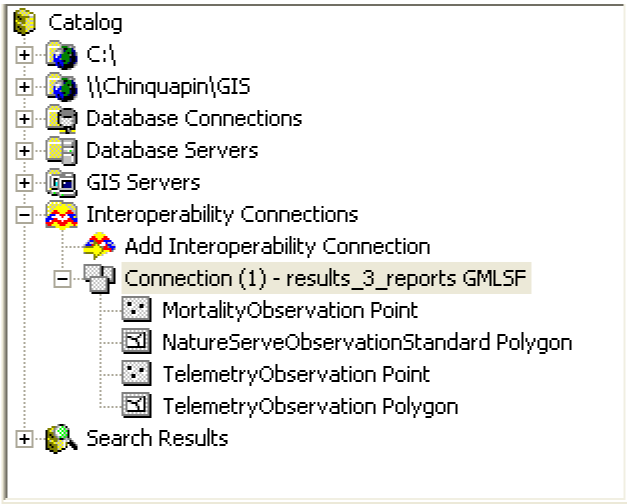


5. Click the  button for Dataset and navigate to the GML file that you downloaded.



6. Accept the default Coordinate System setting of **Read from Source**.
7. Say **OK**.

8. The dataset can be found in the *Interoperability Connection* section of ArcCatalog and can be loaded into ArcMap like any other dataset.

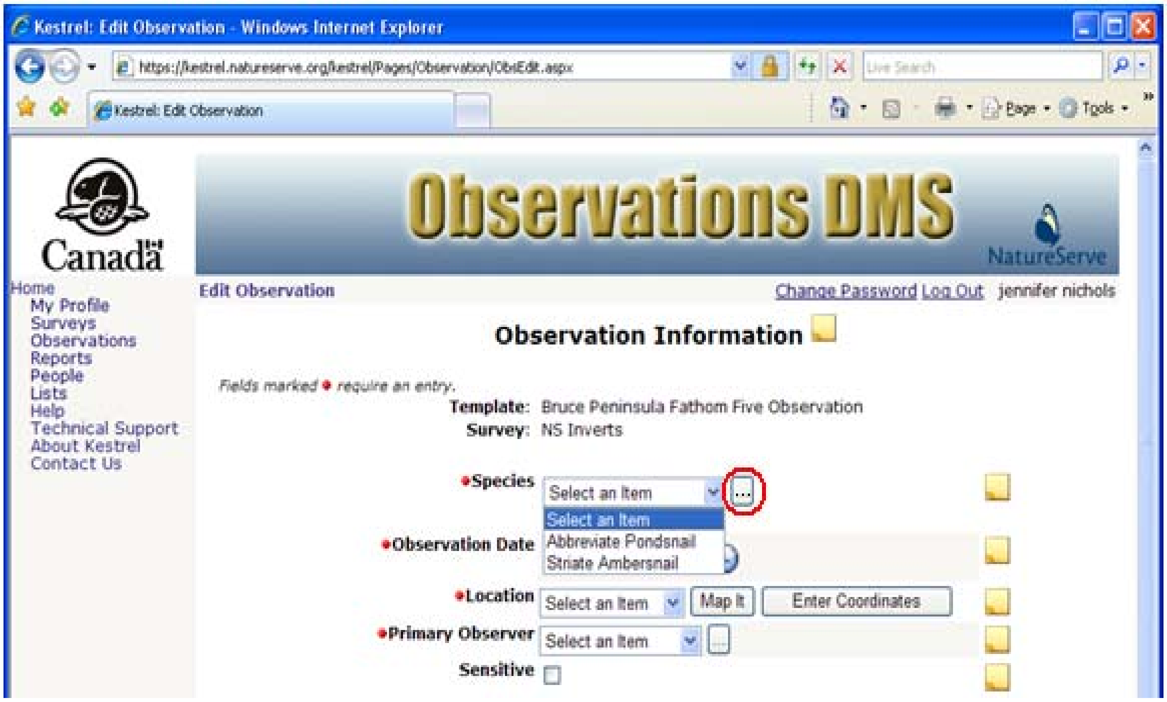


Related Tasks:

- Export Observations

Select a Species

1. Within the *Edit Observation* page, choose from among the species names in the dropdown list or search for a different species by clicking the  button.

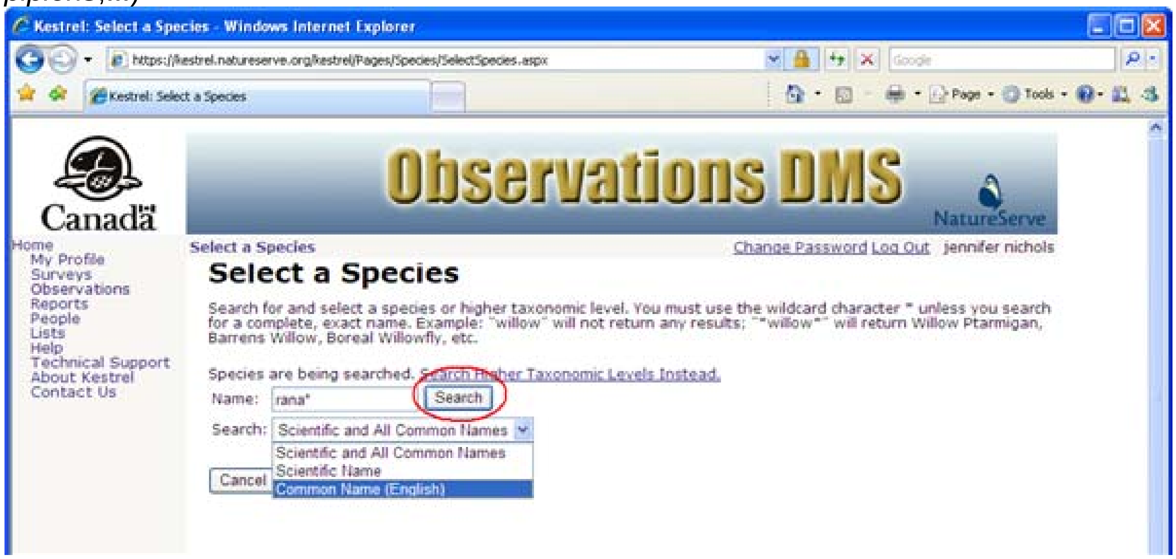


2. A species can be searched in one of two ways:
    - Use common or scientific name (at the genus and species level)
    - Use higher taxonomic levels

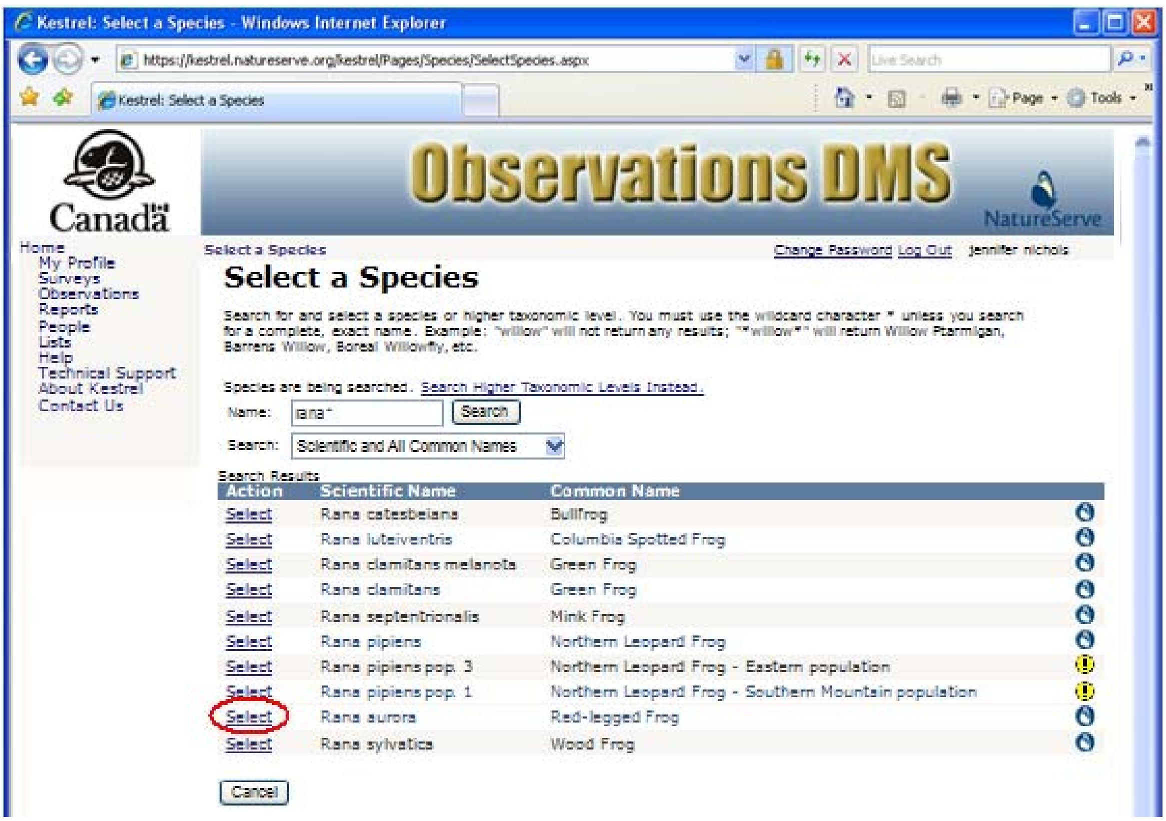
Use common or scientific name

1. Within the *Select a Species* page, type in part or all of the scientific or common name and specify which you will be searching on by selecting the appropriate value from the Search dropdown list. Click **Search**.

NOTE: Use * as the wildcard indicator. (i.e., rana* will return *Rana aurora*, *Rana pipiens*,...)

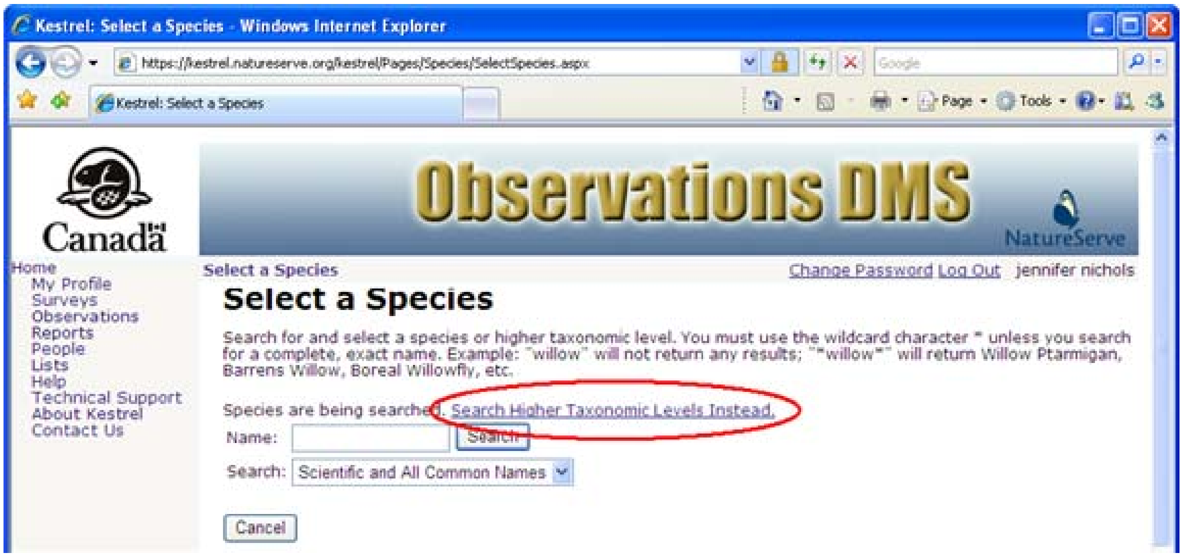


2. **Select** the appropriate species from Search Results, which will return you to the *Edit Observation* page, populating the Species field with your selection.



Use higher taxonomic levels

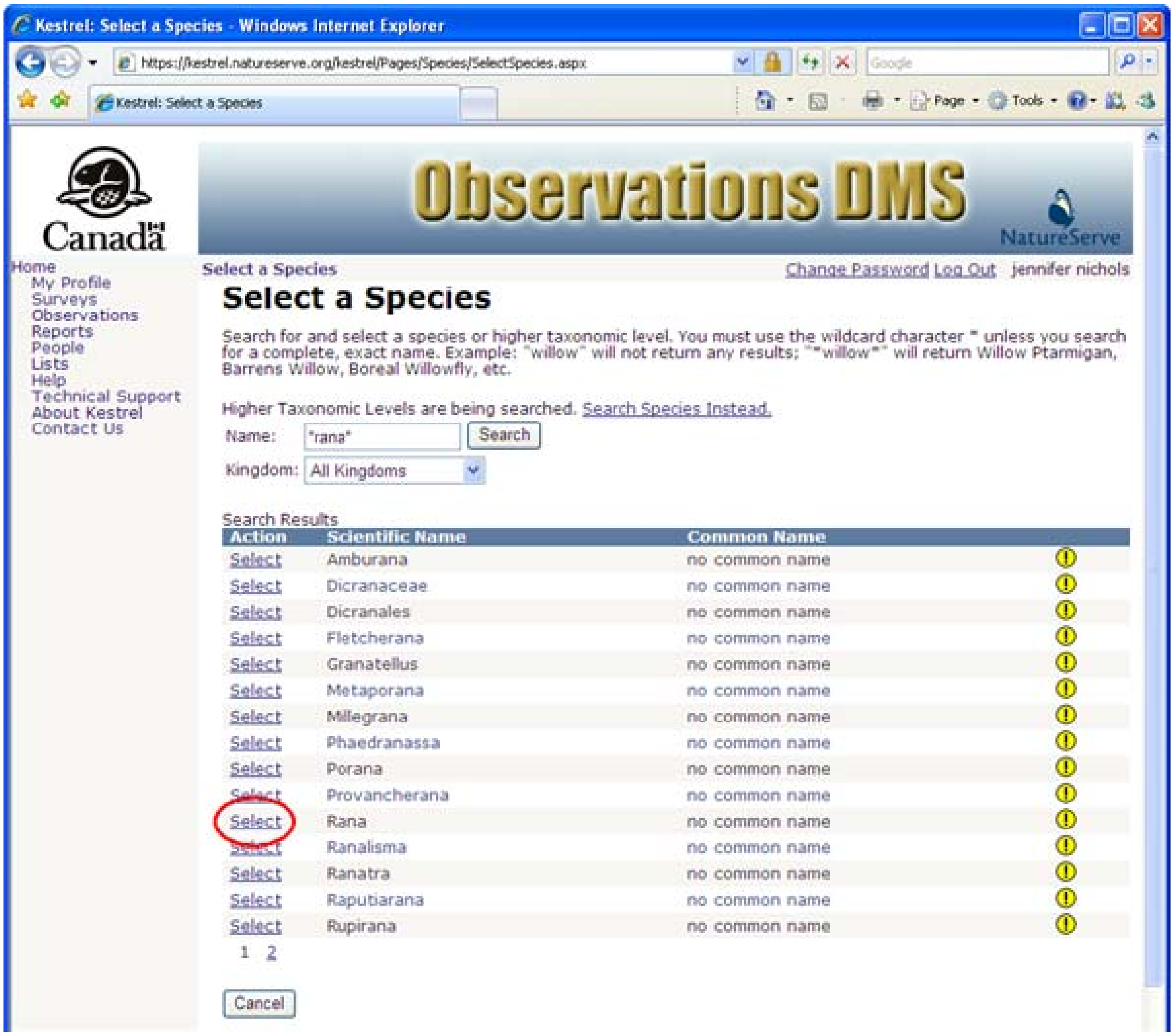
1. Within the *Select a Species* page, click on **Search Higher Taxonomic Levels Instead**.



2. Type in a name and specify which taxonomy you will be searching on by selecting the appropriate value from the Search dropdown list. Click **Search**.

NOTE: Use * as the wildcard indicator. (i.e., *rana* will return *Amburana, Dicranaceae*, *Dicranales*…)

3. **Select** the appropriate name from Search Results, which will return you to the *Edit Observation* page, populating the Species field with your selection.



Related Tasks:

- Edit Observation

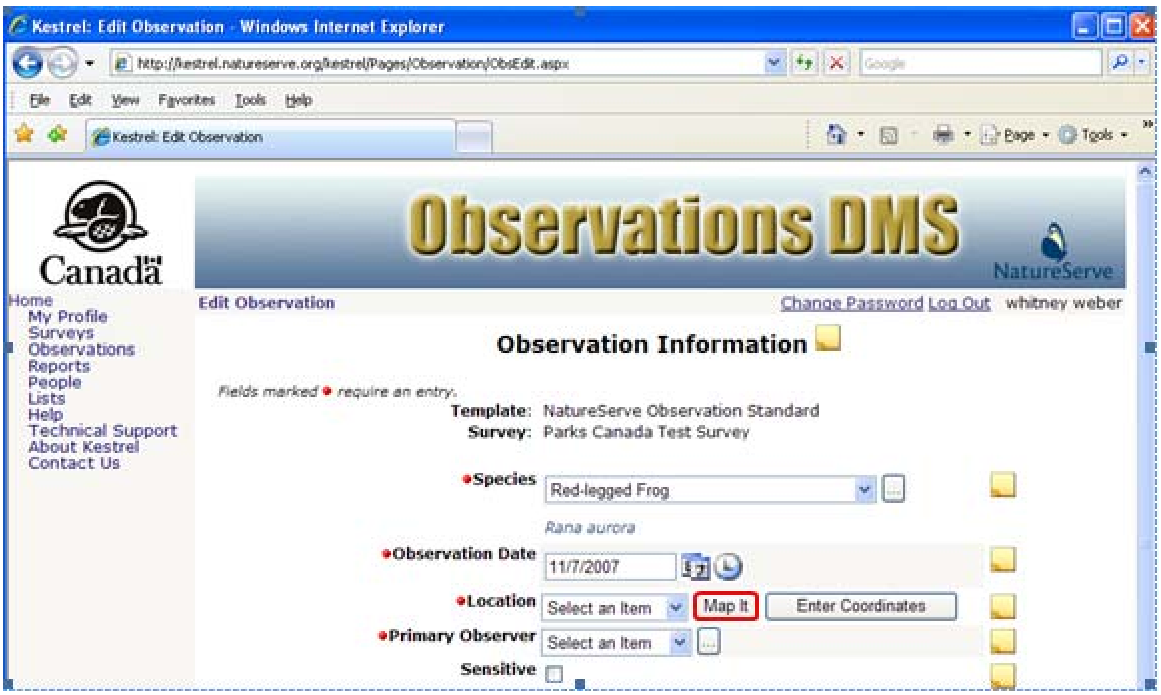
Create New Location

A new location for an observation can be created by:

- Mapping it
- Entering coordinates

Map it

1. Within the *Edit Observation* page click the Map It button to open the *Edit Location* page.



2. Within the *Edit Location* page, draw the location:

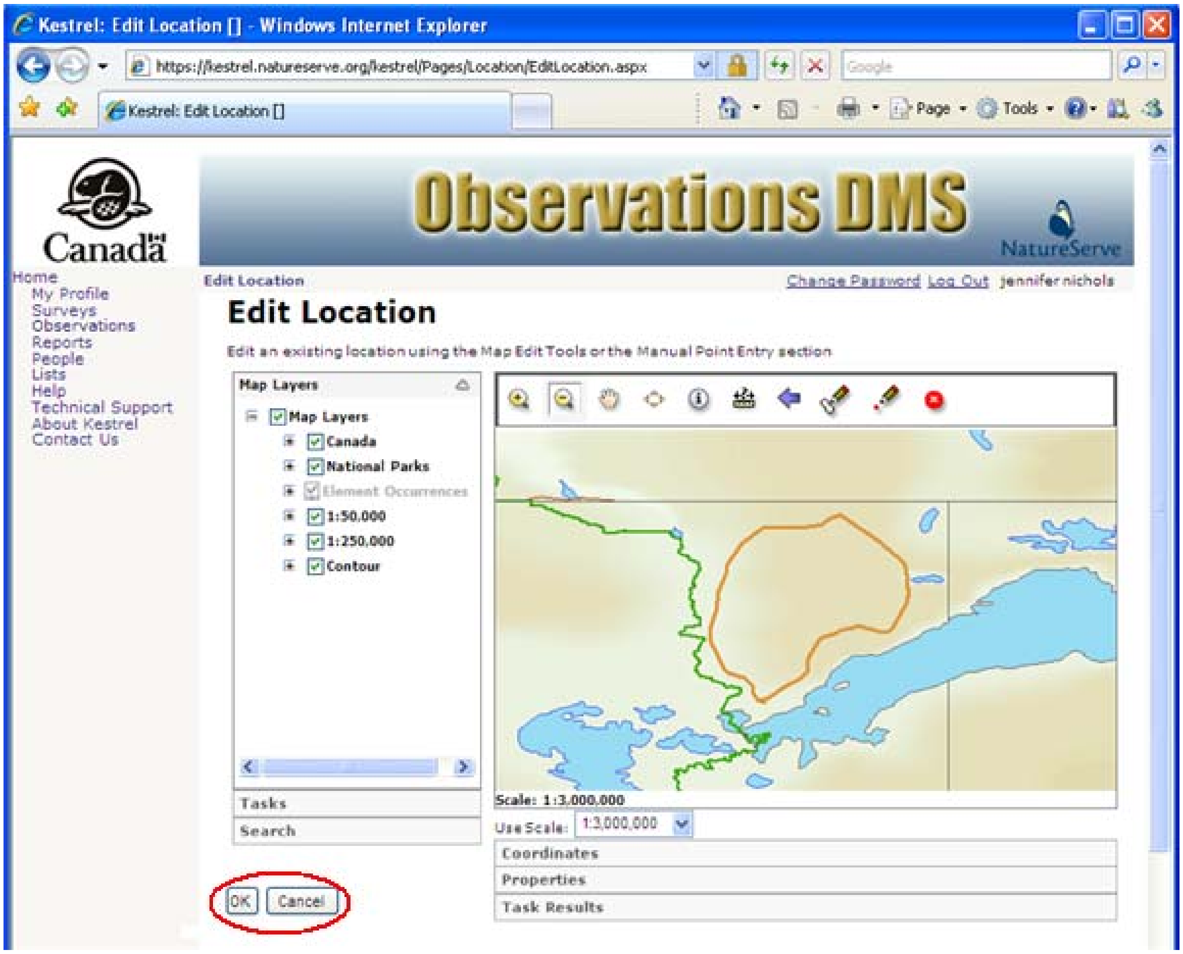
a. Navigate to the desired location using the Mapping Tools.

b. Select the Draw Point or Draw Polygon tool as appropriate.

c. Draw the location.

- When drawing a polygon, click to place each vertex and double-click to finish the polygon.

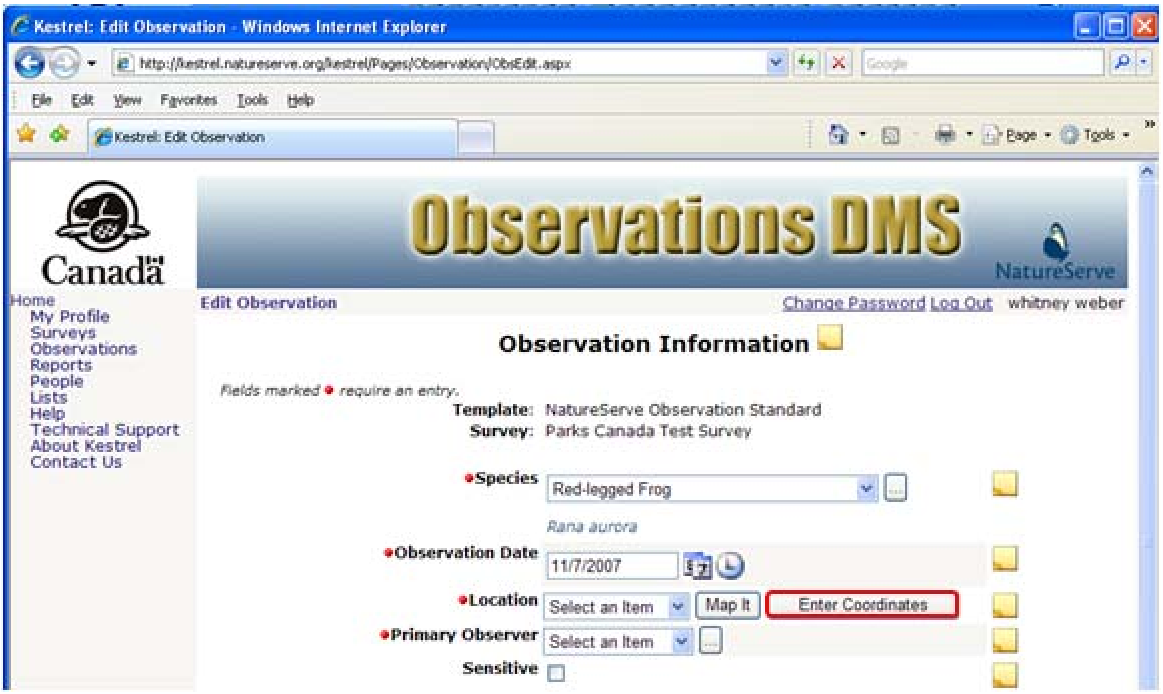
3. Click **OK** to save the location and return to the *Edit Observation* page, or click **CANCEL** to cancel the location creation and return to the *Edit Observation* page, or assign a name to the location, using instructions in the ”r;Name the location” section below.



Enter Coordinates

The fields for entering coordinates can be accessed from both the *Edit Observation* and *Edit Location* pages.

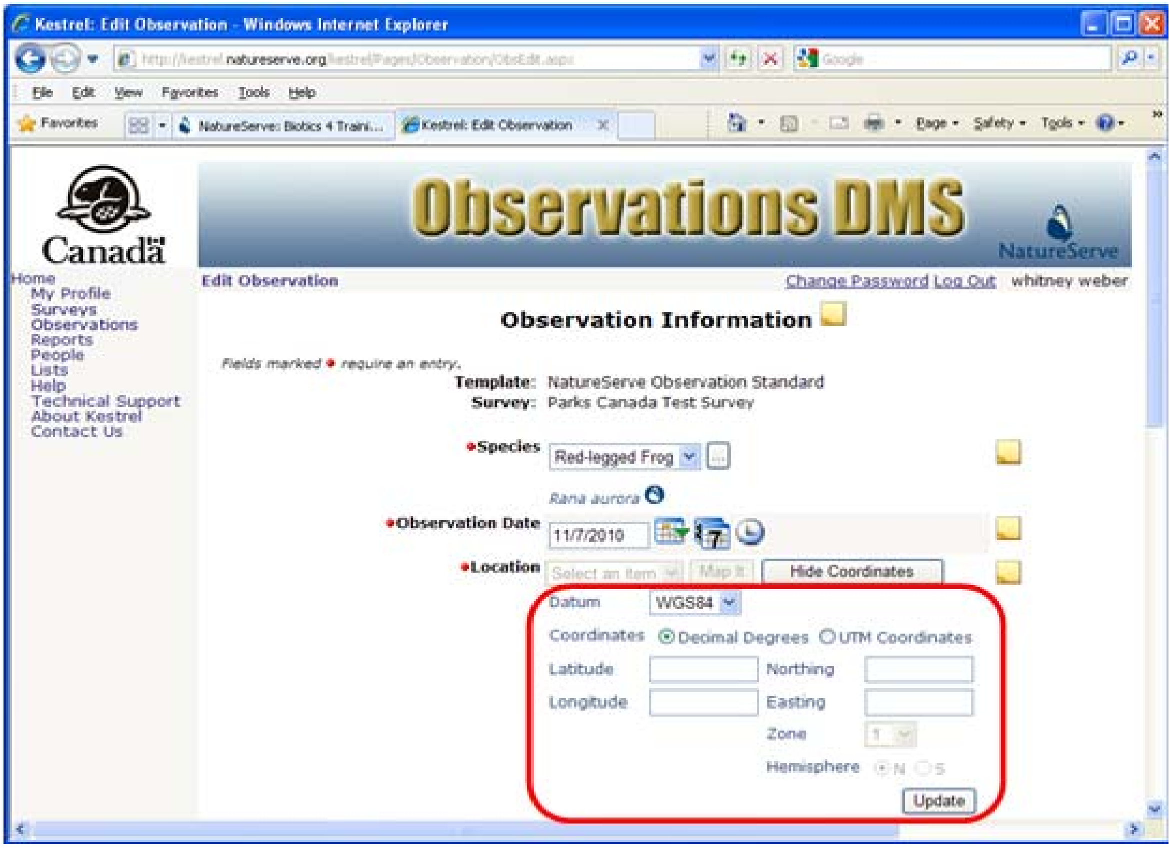
1. Within the *Edit Observation* page, expand the Coordinates section located under the Location field by clicking the Enter Coordinates button.



2. In the expanded set of fields, using the dropdown list, indicate the **Datum** of the coordinates.

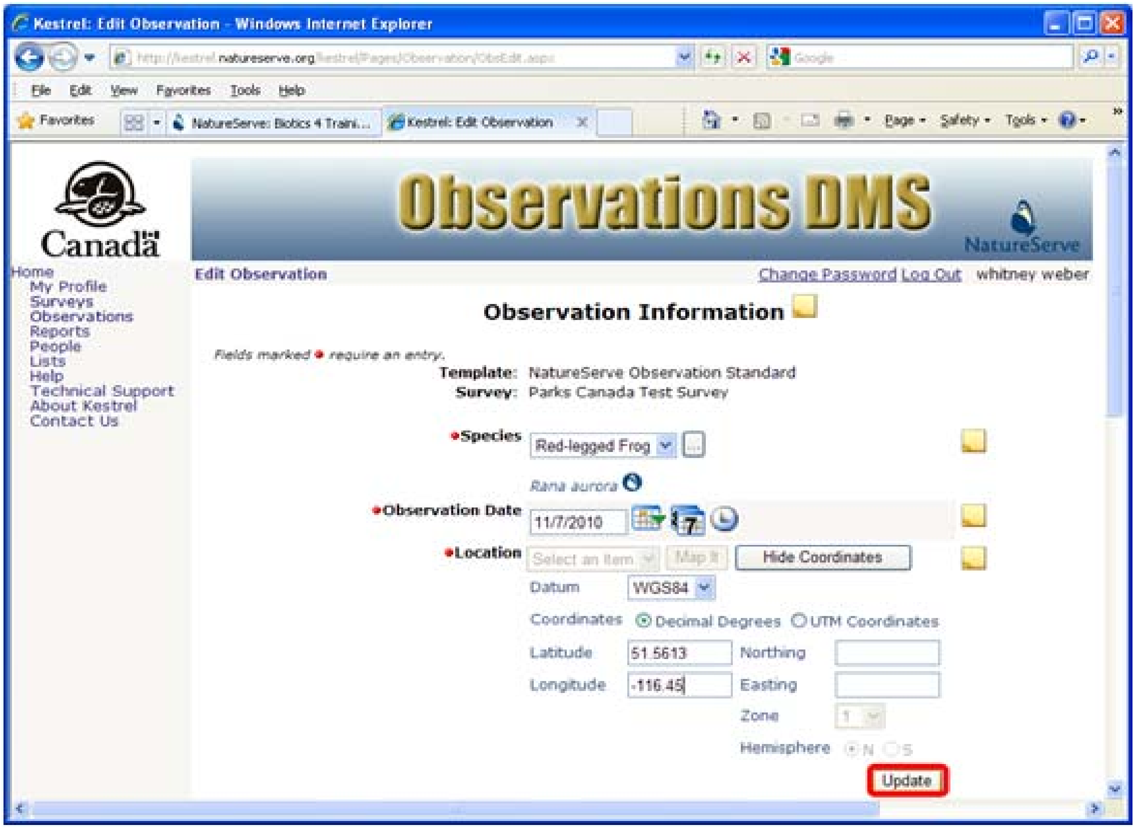
NOTE: WGS84 is equivalent to NAD83 in Canada.

3. Using the radio button, indicate whether the coordinates are in **Decimal Degrees** or are **UTM Coordinates**.



- When entering UTM Coordinates, indicate the UTM Zone, from the dropdown list, and Hemisphere, using the radio buttons, of the coordinates.

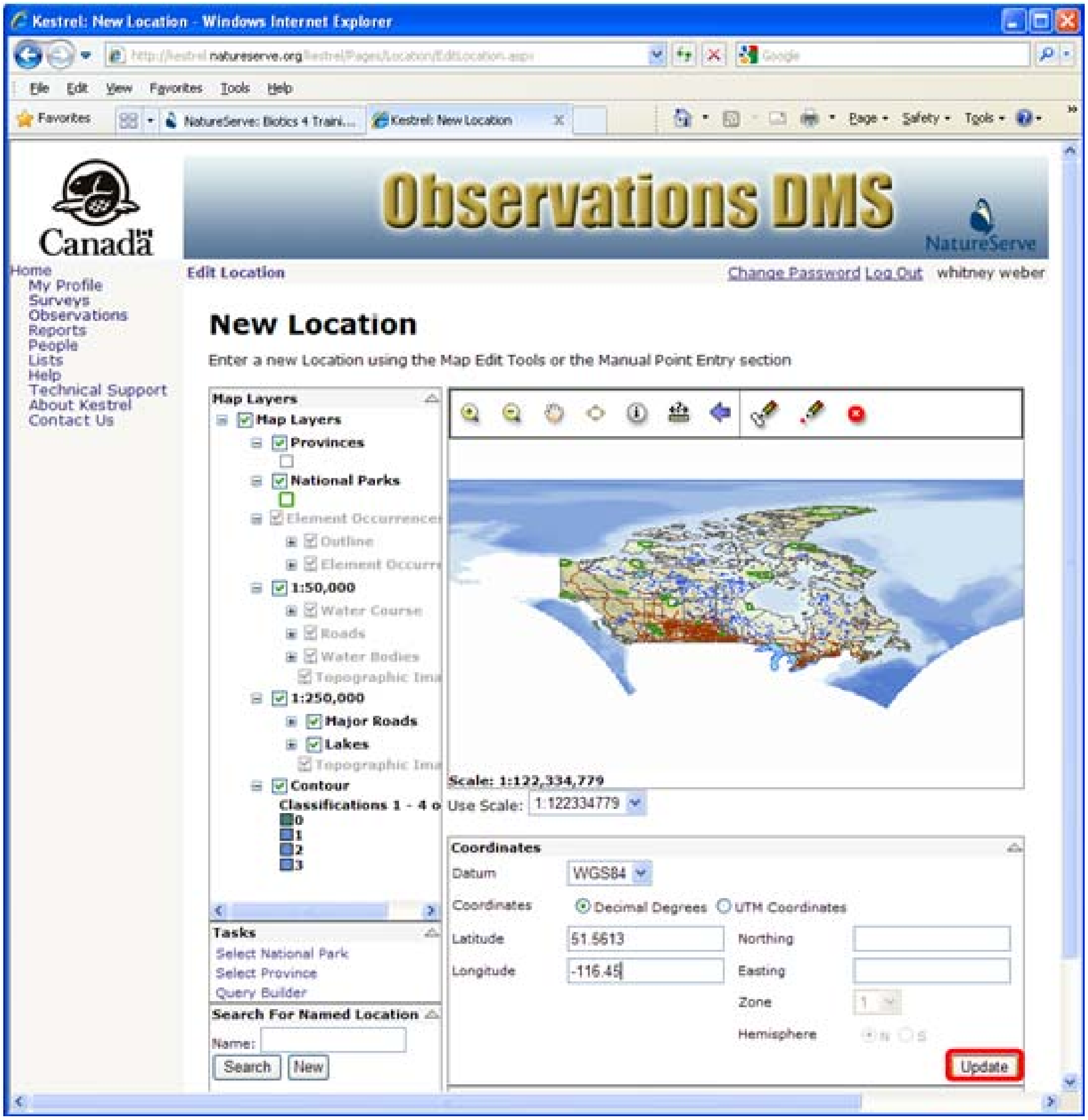
4. Click **Update** to save the coordinate data.



Use Edit Location page to enter coordinates

1. Open the *Edit Location* page by clicking the Map It button, and expand the Coordinates section located under the map by clicking the button.
2. Using the dropdown list, indicate the **Datum** of the corrdinates.

   NOTE: WGS84 is equivalent to NAD83 in Canada.
3. Using the radio button, indicate whether the coordinates are in **Decimal Degrees** or are **UTM Coordinates**.
   - When entering UTM Coordinates, indicate the UTM Zone, from the dropdown list, and Hemisphere, using the radio buttons, of the coordinates.
4. Click **UPDATE** to save the coordinate data, or click **CANCEL** to cancel the location creation and return to the *Edit Observation* page.



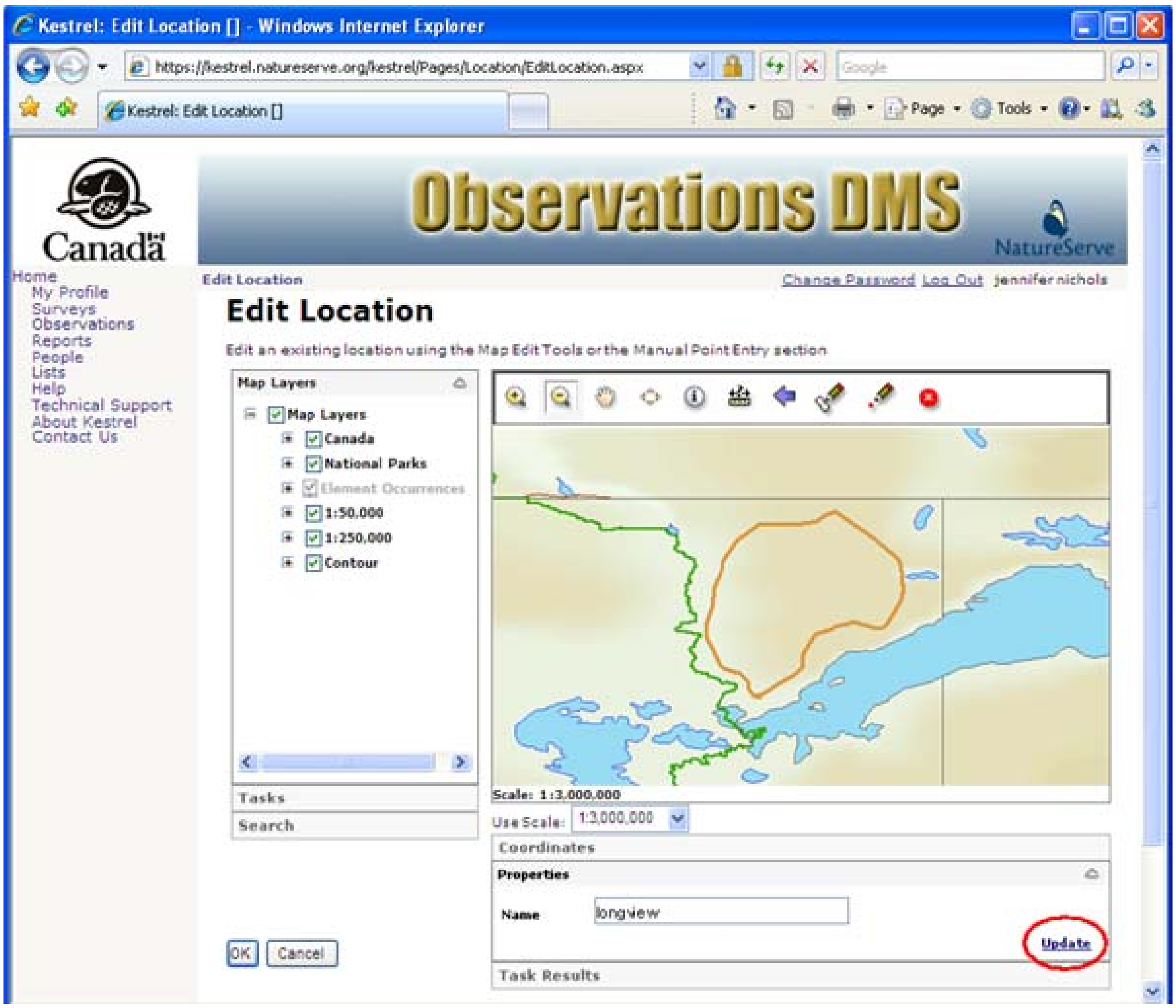
5. Click **OK** to save the location and return to the *Edit Observation* page, or assign a name to the location, using instructions in the "r;Name a Location" section below.

Related Tasks:

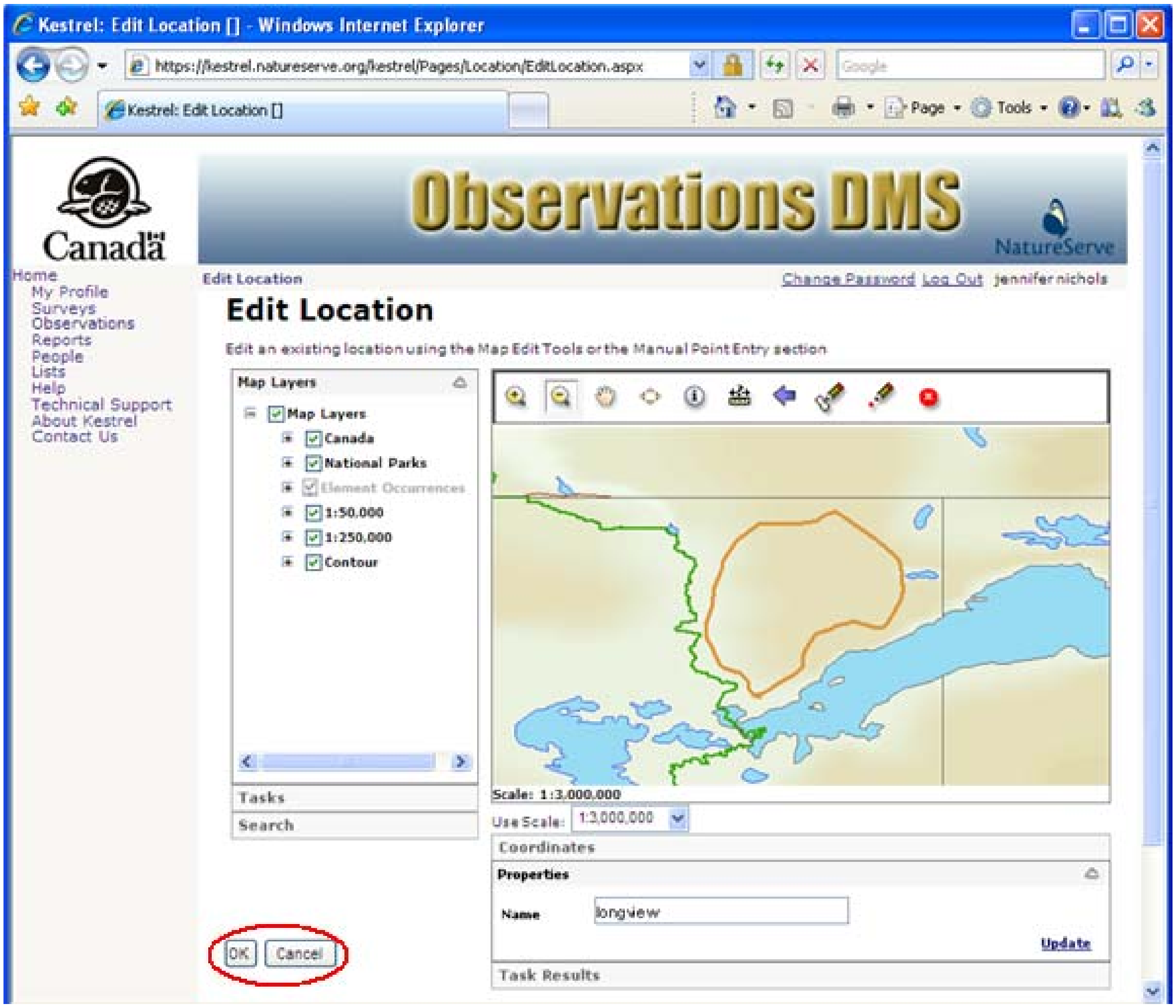
- Name a Location

Name a Location

1. To facilitate selecting the location by name for use again in the future, within the *Edit Location* page expand the Properties section, located under the map and Coordinates section, by clicking the button.
2. Enter the name of the location. and click **Update** to save.



3. Click **OK** to save the changes to the location and return to the *Edit Observation* page or click **CANCEL** to cancel the location creation and return to the *Edit Observation* page.


Kestrel: Edit Location [] - Windows Internet Explorer
https://kestrel.natureserve.org/kestrel/Pages/Location/EditLocation.aspx
Kestrel: Edit Location []
Page
Tools
Canada
Observations DMS
NatureServe
Home
My Profile
Surveys
Observations
Reports
People
Lists
Help
Technical Support
About Kestrel
Contact Us
Edit Location
Change Password
Log Out
jennifer nichols
Edit Location
Edit an existing location using the Map Edit Tools or the Manual Point Entry section
Map Layers
Map Layers
Canada
National Parks
Element Occurrences
1:50,000
1:250,000
Contour
Tasks
Search
Scale: 1:3,000,000
Use Scale:
1:3,000,000
Coordinates
Properties
Name
longview
Update
OK
Cancel
Task Results

Edit Location

NOTE: Editing a named location will affect the location of EVERY observation that uses that named location.

A named location can be selected for editing in two ways:

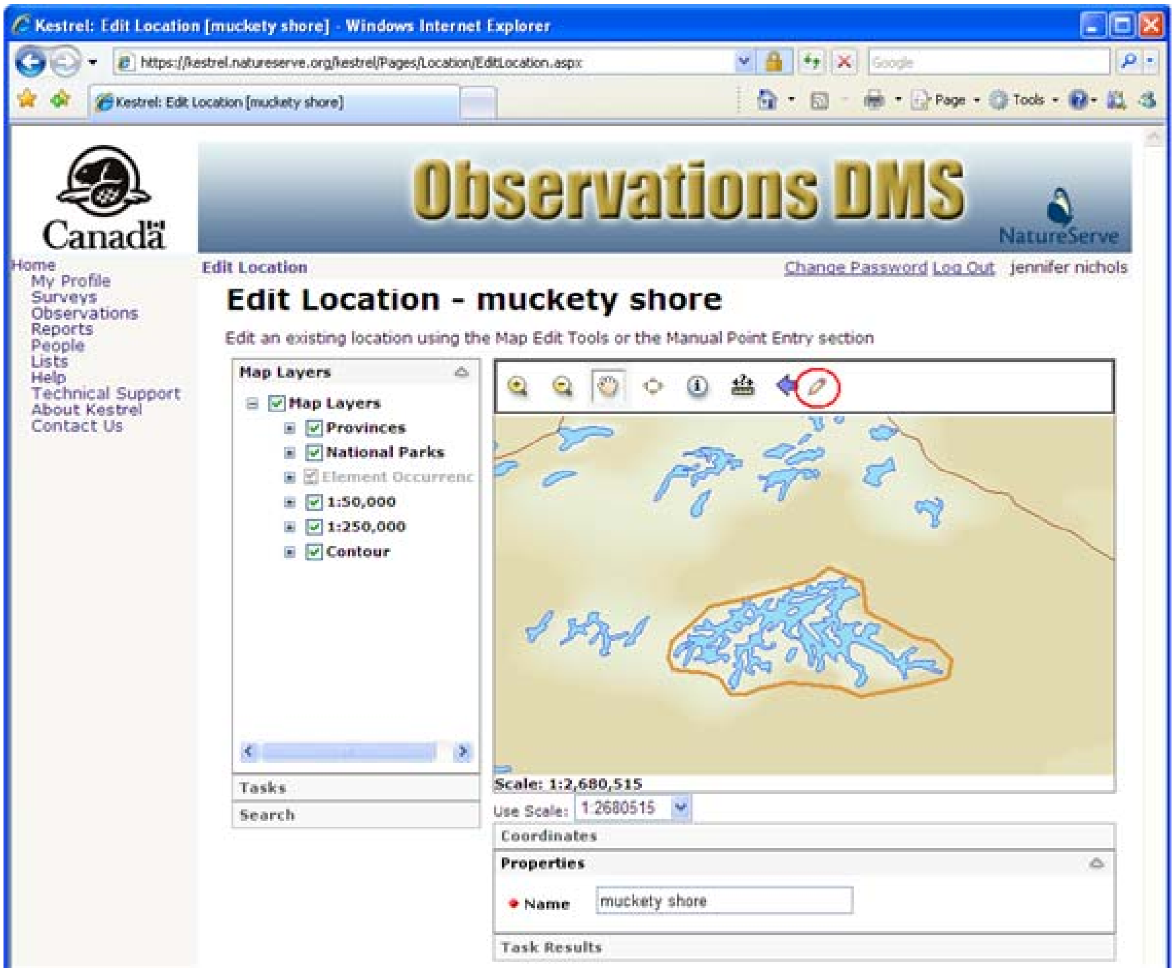
- Select named location from the Location dropdown list;
- If the named location is not available in the Location dropdown list, use the Search function to find the named location to be edited.

Once a location has been selected, it can be edited in one of two ways (as in the Create a New Location task):

- Redraw the feature on the map
- Change the coordinates

1. Within the *Edit Observation* page click the Map It button.

2. Within the *Edit Location (- [Location Name])* page, click the **Edit Select Location** tool .



3. To edit a location, you can either add to a polygonal location by drawing an additional polygon; or you can replace a location by redrawing it. The location itself cannot be edited by moving vertices, but can be redrawn:

Add to a polygonal location:

- Navigate to the desired location using the Mapping Tools.
- Select the Draw Polygon tool  .
- Draw the additional polygon, using a single click to place each vertex and a double click to finish the polygon.

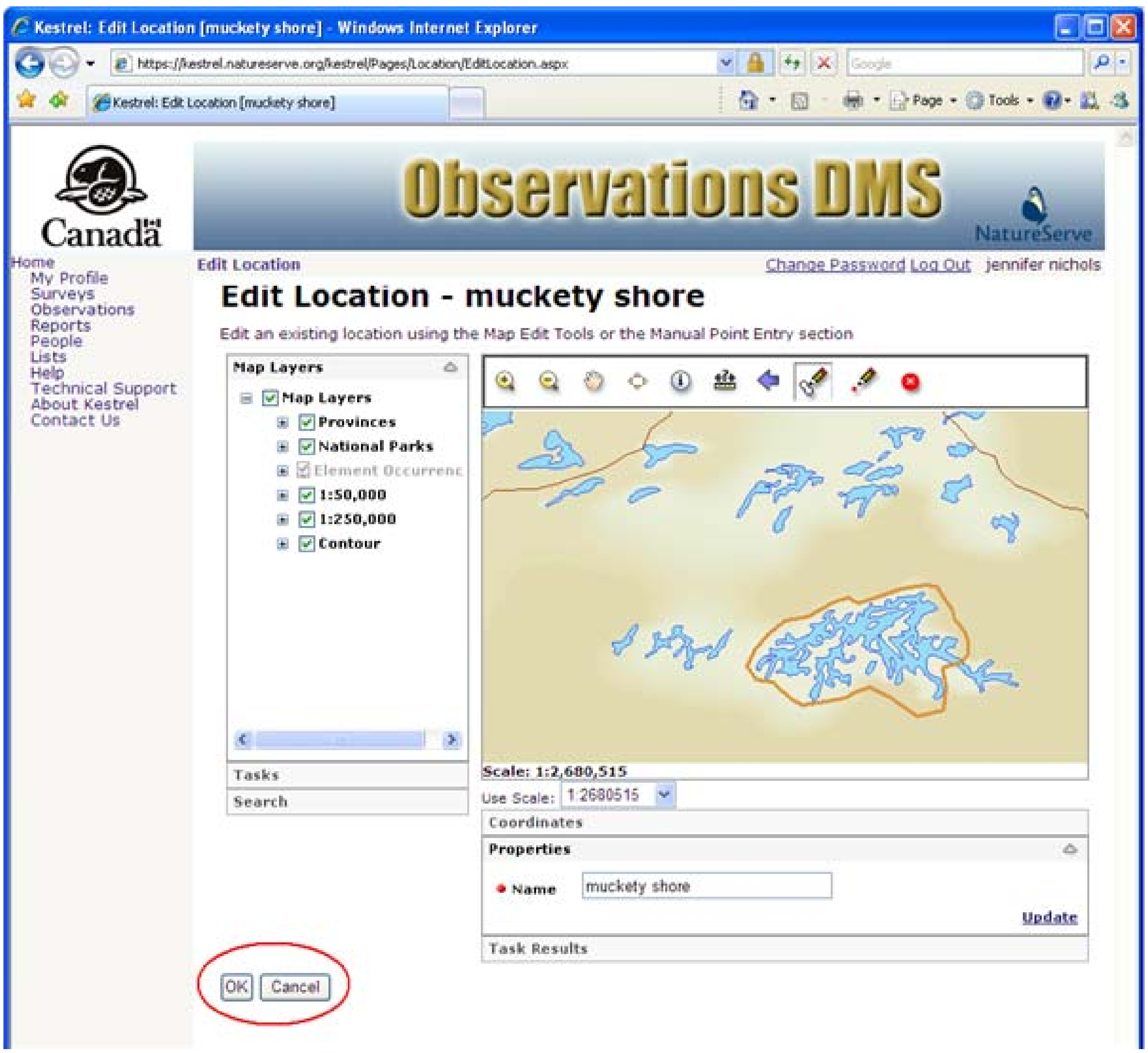
Redraw point

2. Navigate to the desired location using the Mapping Tools.
3. Select the Draw Point tool  .
4. Click on the map in the desired location.

Redraw polygon:

- Navigate to the desired location using the Mapping Tools.
- Clear the existing location using the Clear all Graphics tool .
- Select the Draw Polygon tool .
- Draw the desired polygon, using a single click to place each vertex and a double click to finish the polygon.

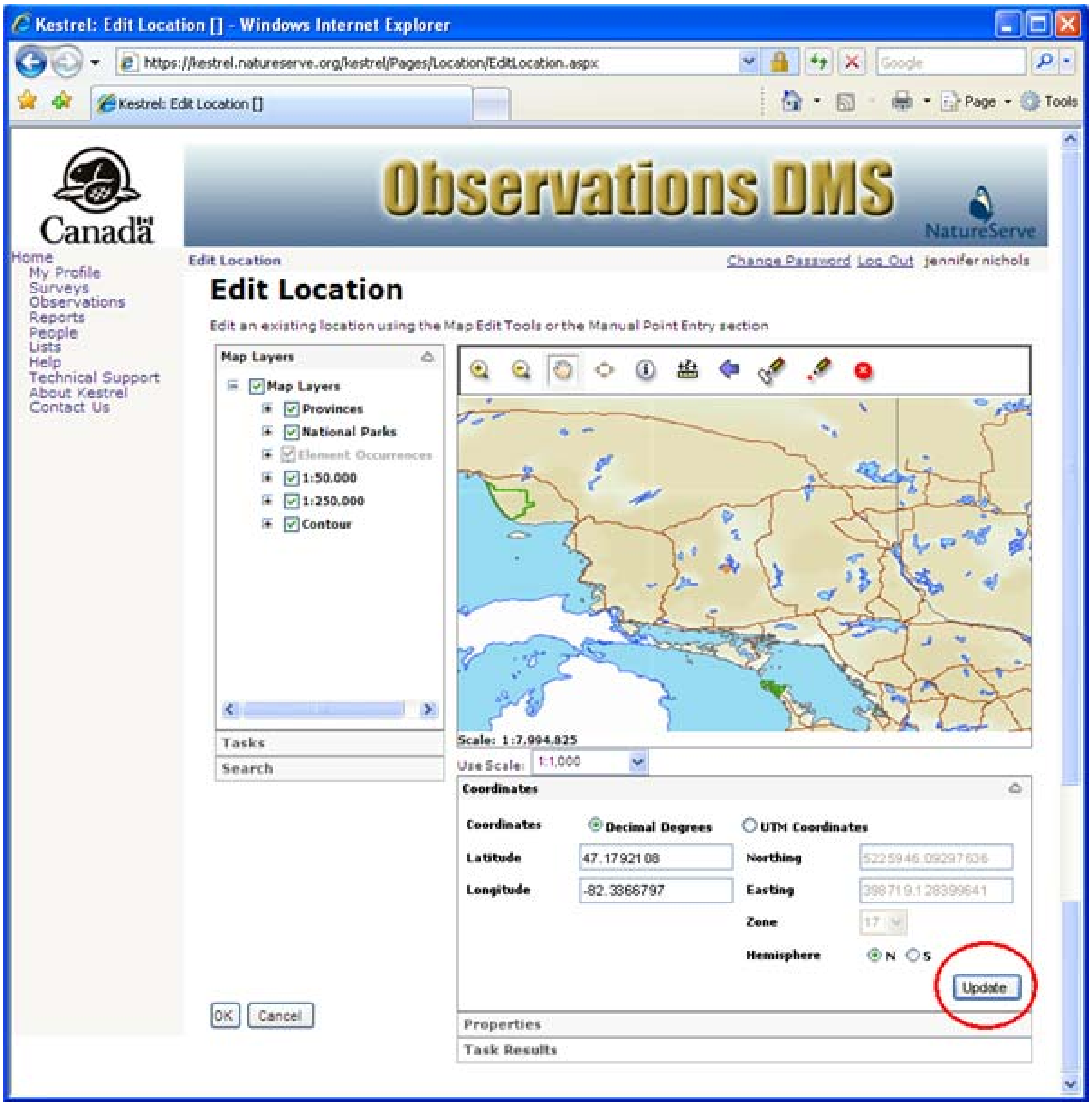
4. Click **OK** to save the updated location and return to the *Edit Observation* page, or click **CANCEL** to cancel the update to the named location and return to the *Edit Observation* page.



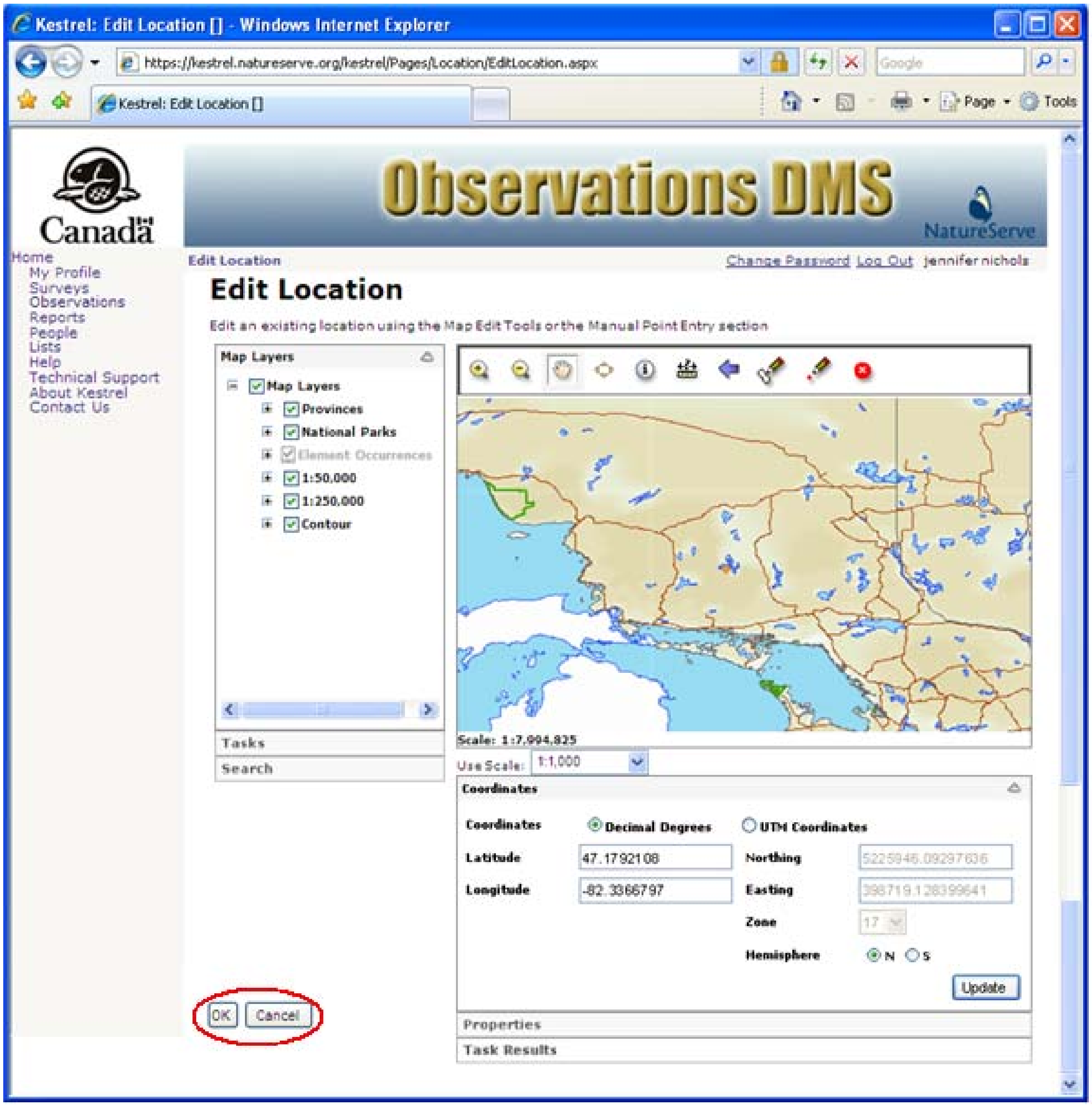
Edit coordinates

1. Open the *Edit Location* page by clicking the Map It button, and expand the Coordinates section located under the map by clicking the button.

2. Using the radio button, indicate whether the edited coordinates are in **Decimal Degrees** or are **UTM Coordinates**.
   - All coordinates must be entered in NAD83.
   - When entering UTM Coordinates, indicate the UTM Zone, from the dropdown list, and Hemisphere, using the radio buttons, of the coordinates.
3. Click **Update** to save the edited coordinates.

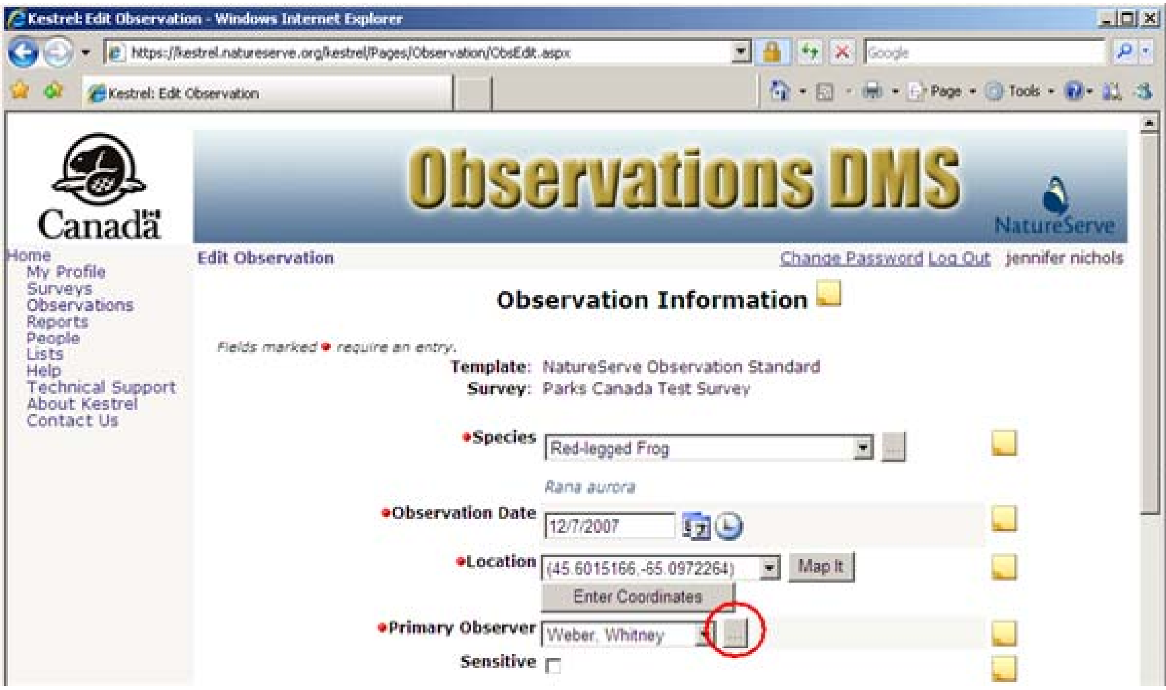


4. Click **OK** to save the changes to the location and return to the *Edit Observation* page, or **CANCEL** to cancel the location edit and return to the *Edit Observation* page.

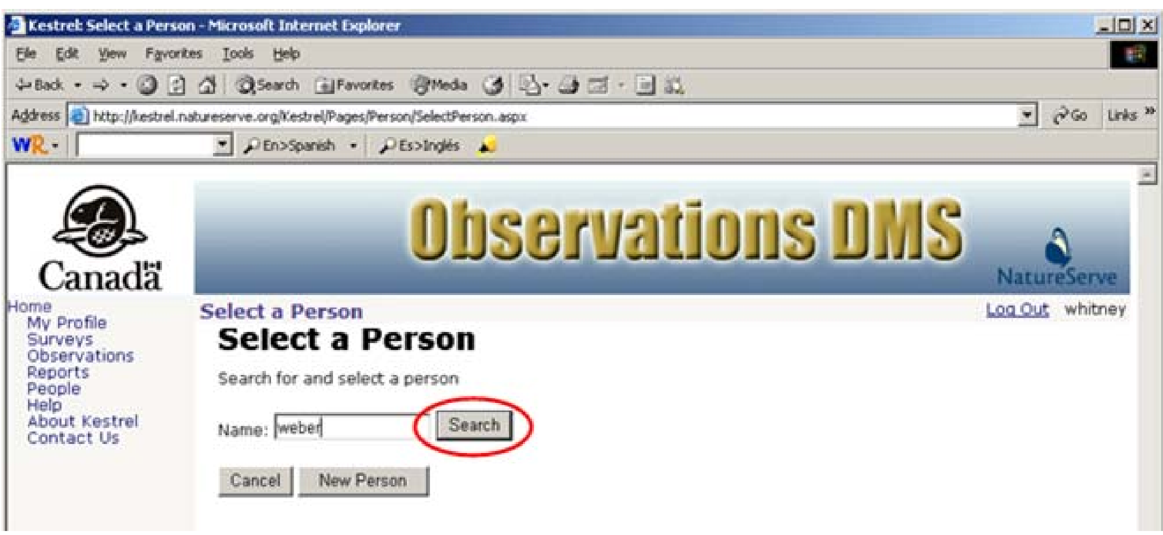

Kestrel: Edit Location [] - Windows Internet Explorer
https://kestrel.natureserve.org/kestrel/Pages/Location/EditLocation.aspx
Observations DMS
NatureServe
Canada
Home
My Profile
Surveys
Observations
Reports
People
Lists
Help
Technical Support
About Kestrel
Contact Us
Edit Location
Change Password
Log Out
jennifer nichols
Edit Location
Edit an existing location using the Map Edit Tools or the Manual Point Entry section
Map Layers
Provinces
National Parks
Element Occurrences
1:50,000
1:250,000
Contour
Tasks
Search
Scale: 1:7,994,825
Use Scale:
1:1,000
Coordinates
Decimal Degrees
UTM Coordinates
Latitude
47.1792108
Longitude
-82.3366797
Northing
5225946.09297636
Easting
398719.128399641
Zone
17
Hemisphere
N
S
Update
OK
Cancel
Properties
Task Results

Select Primary Observer

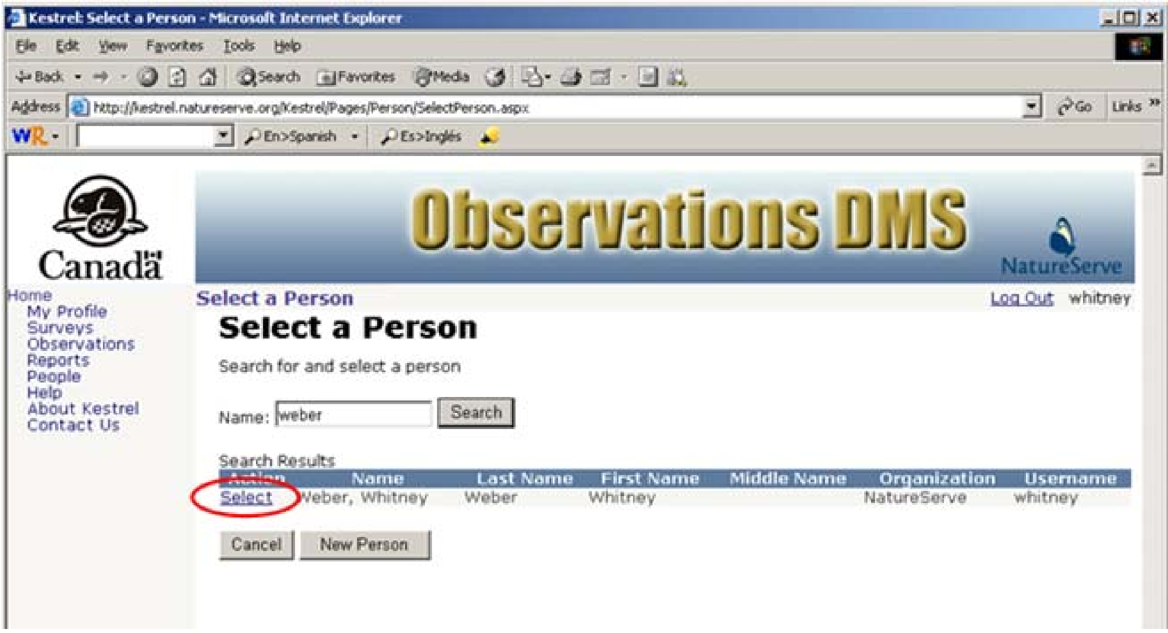
1. Within the *Edit Observation* page, choose from among the names in the dropdown list or search for a different person by clicking the button.



2. Within the *Select a Person* page, type in the person's name and click **Search**.



3. **Select** the desired person or if the person is not currently in the database, click **New Person** to create a new person record.

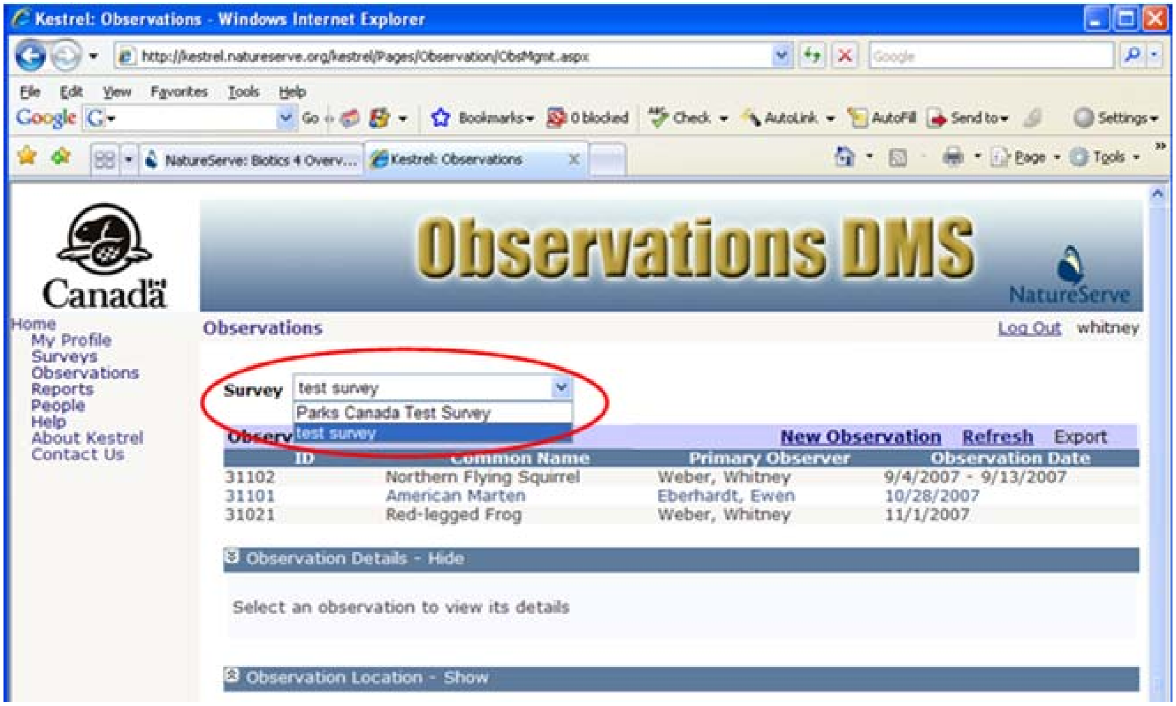


Related Tasks:

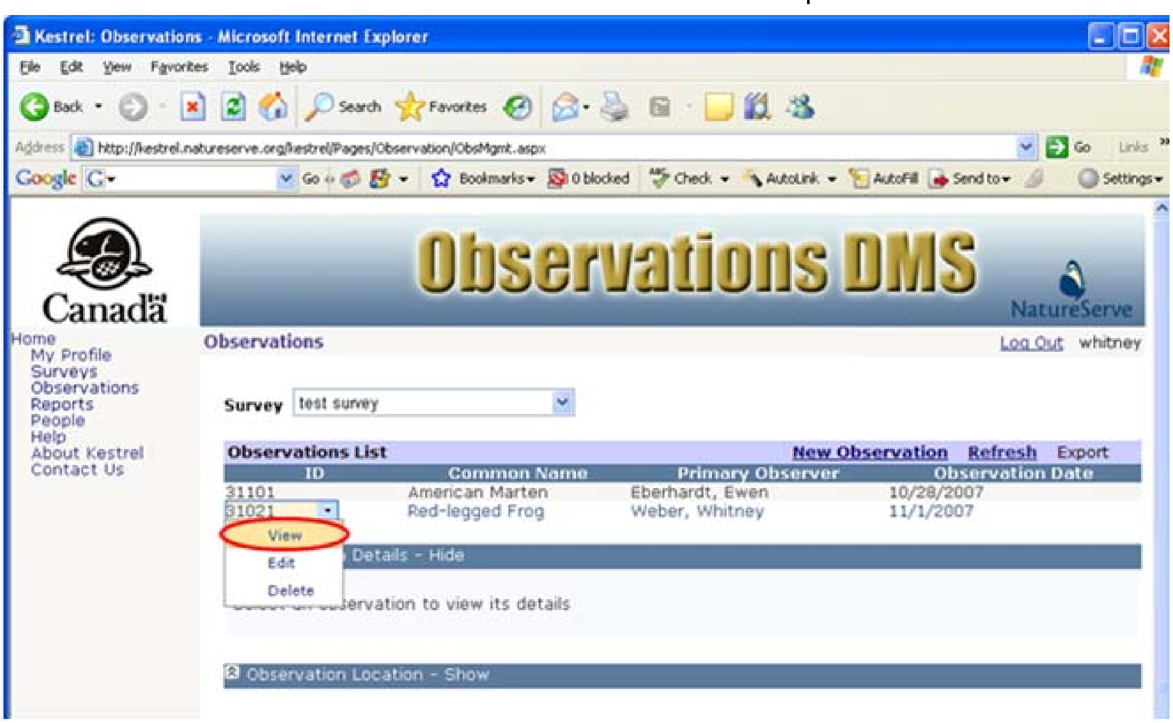
- [Create New Person]

View Observation

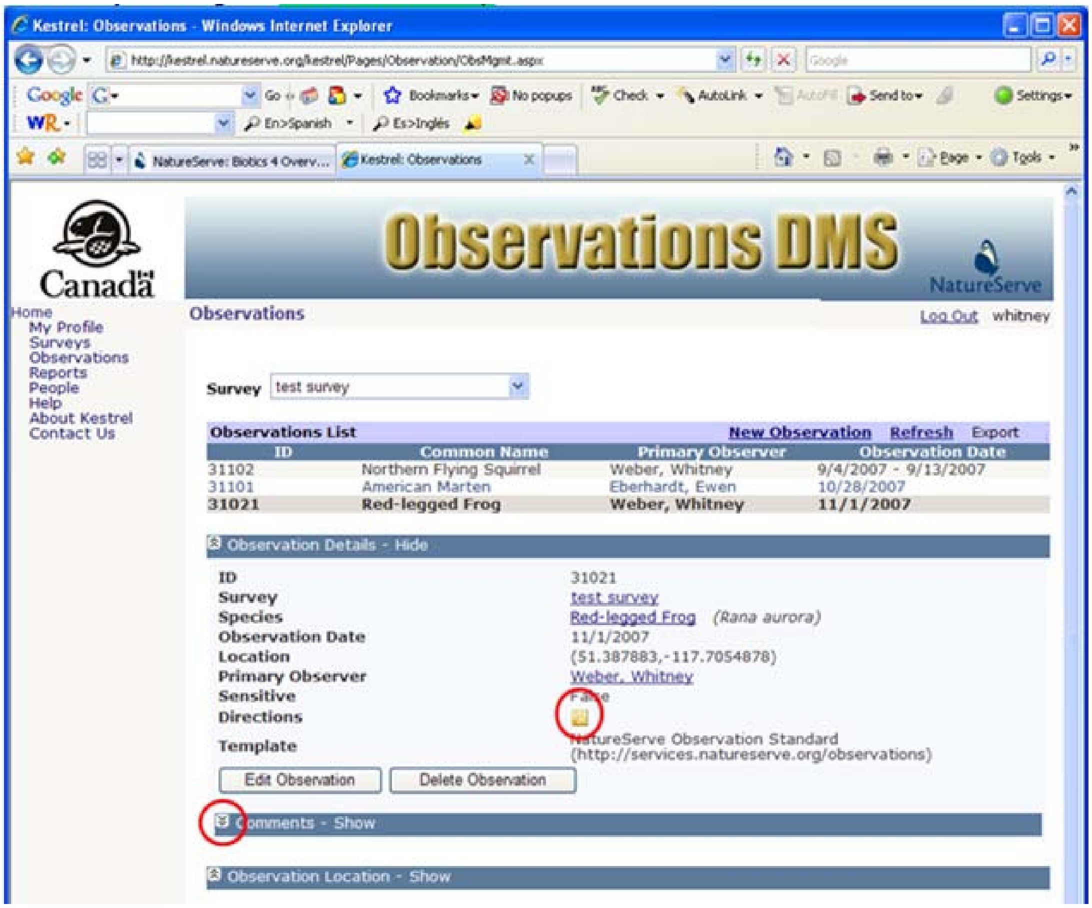
1. Within the *Observations* page, from the **Survey** dropdown list, select the survey containing the observations you wish to view.



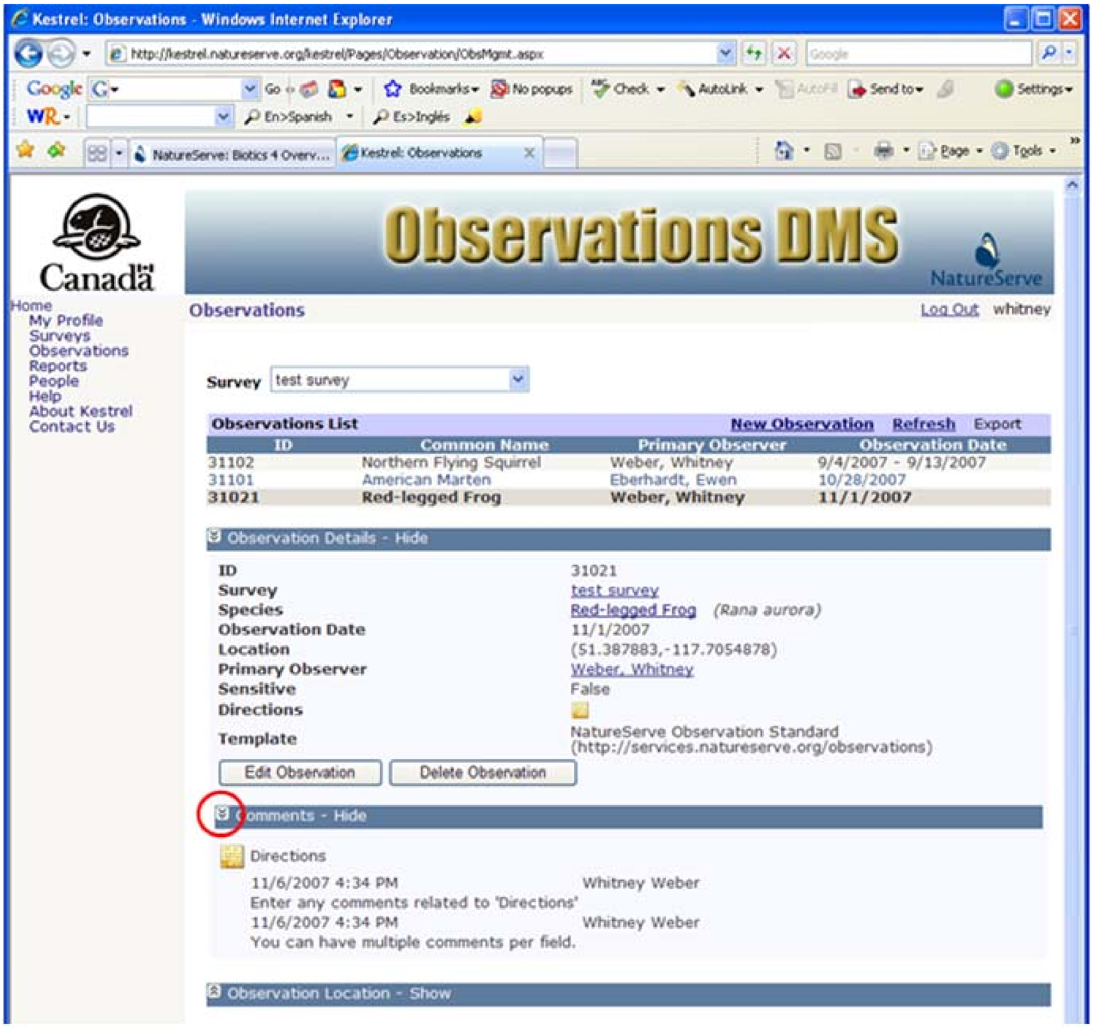
2. Click on the observation record and select **View** from the dropdown list.



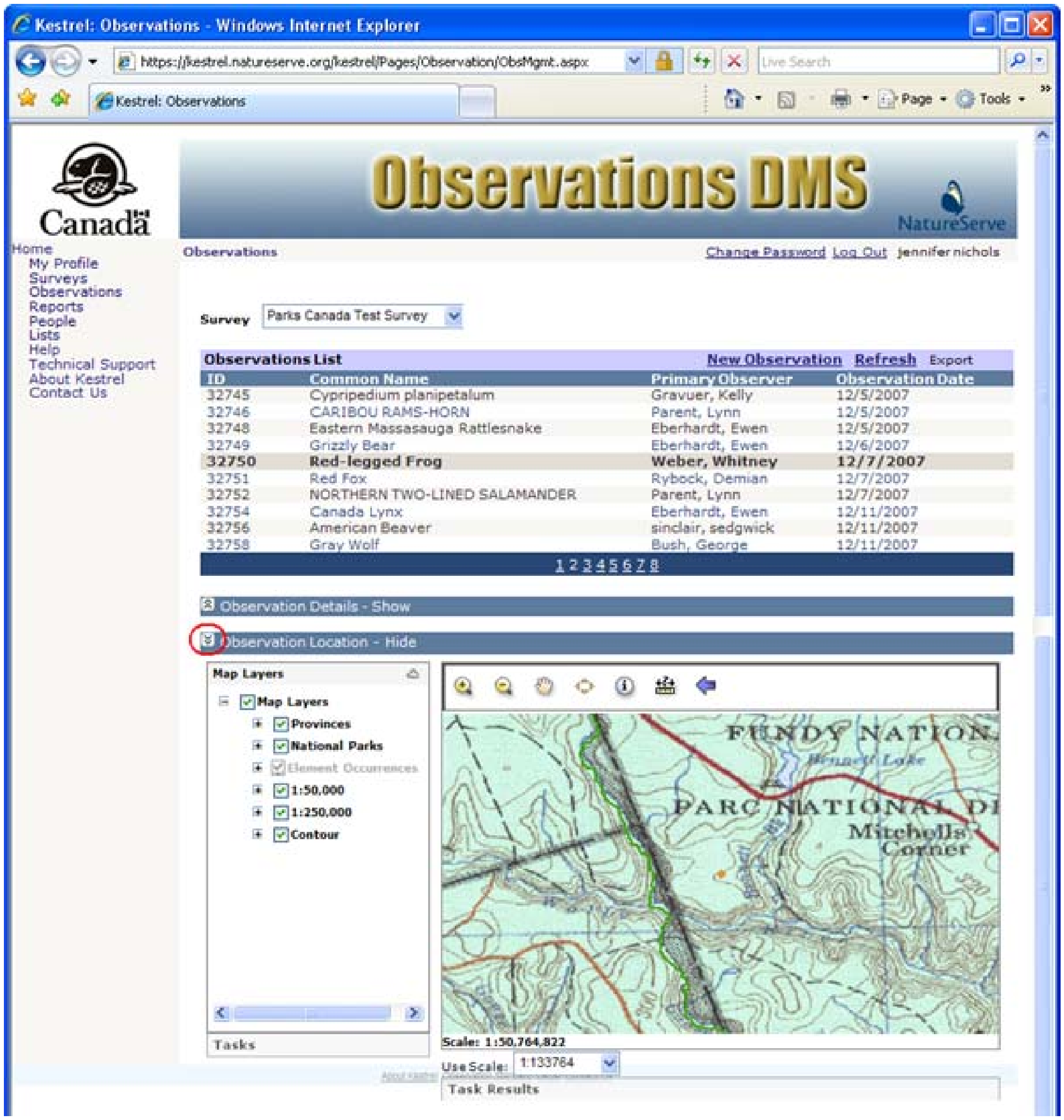
- To view comments, as indicated by the notes icon, expand the Comments section by clicking the icon.



- To hide the Comments section, click the icon.



- To view the Observation Location, expand the Observation Location section, by clicking the icon. Click the icon to hide the Observation Location section.



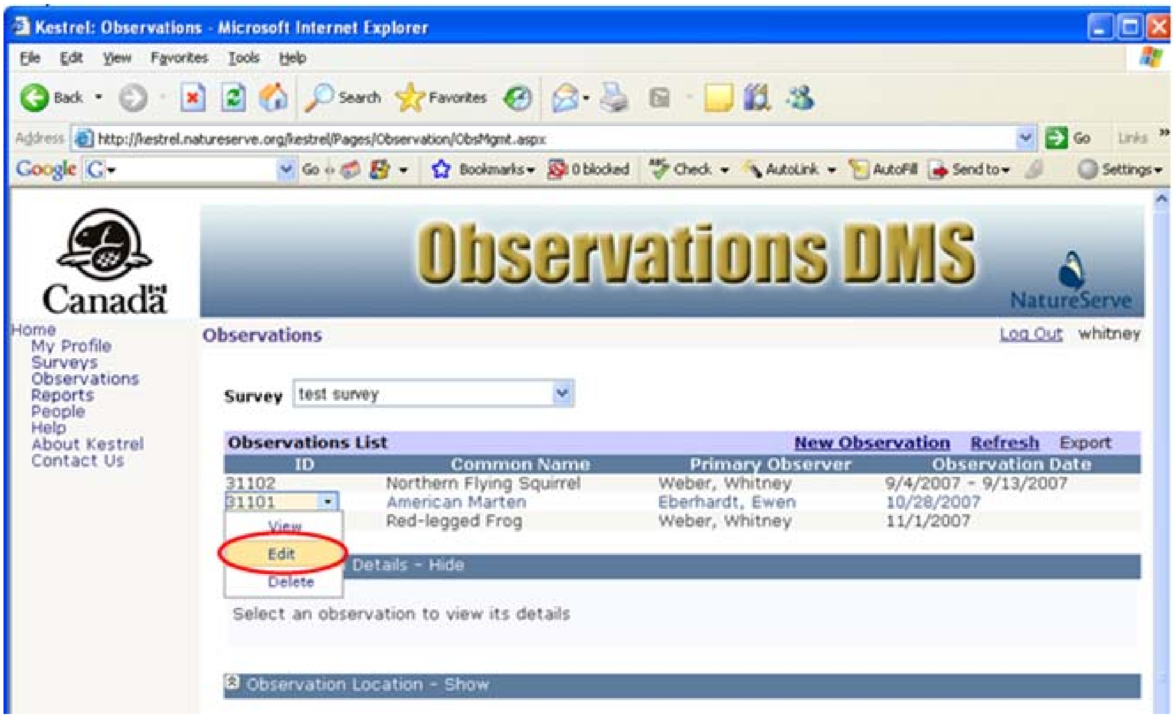
NOTE: See Mapping Tools for more information regarding using the tools associated with the mapping application.

Related Tasks:

- Create New Observation
- Edit Observation
- Delete Observation
- Export Observations
- View Survey

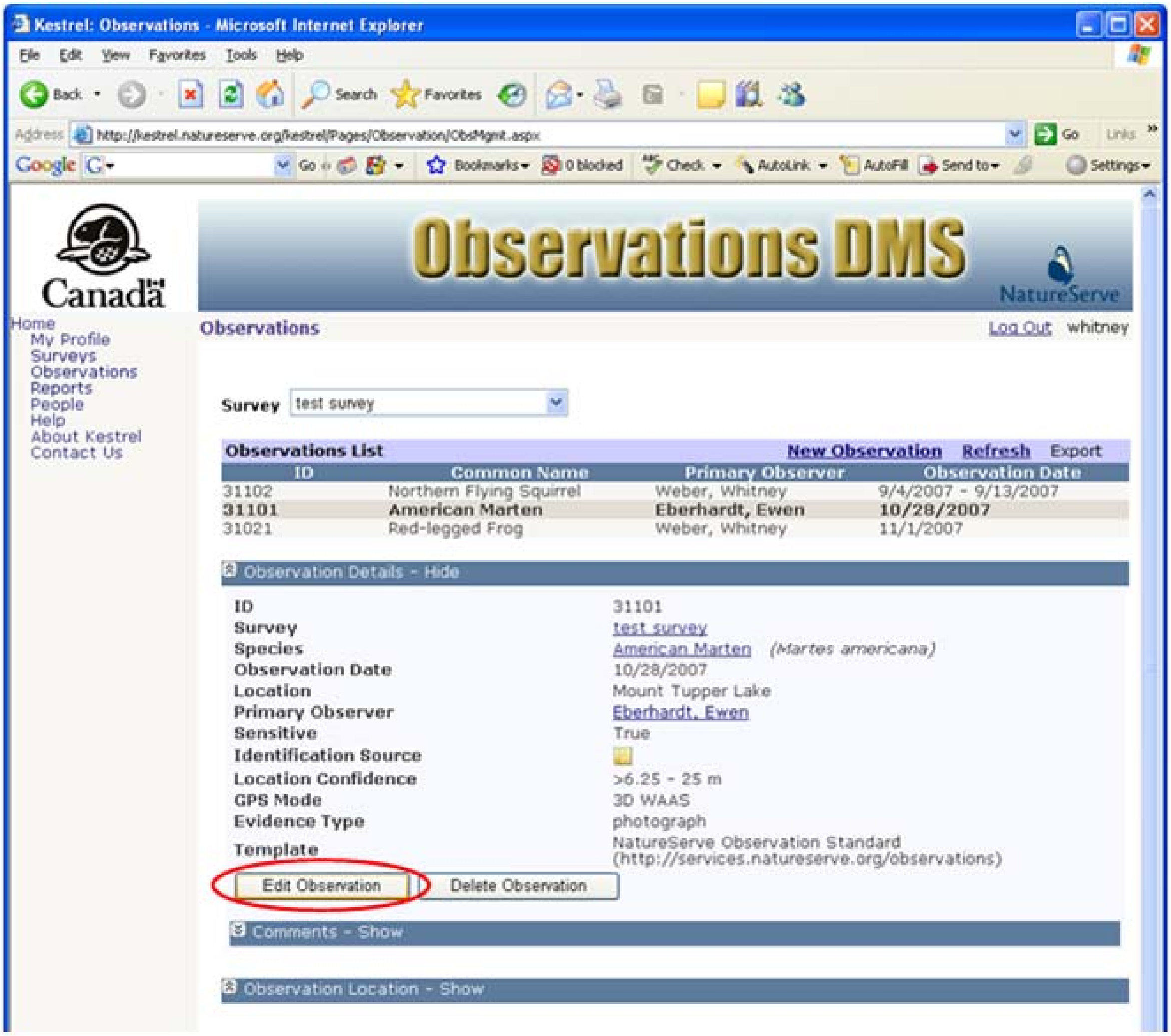
Edit Observation

1. Within the *Observations* page, click on the observation record and select **Edit** from the dropdown list.



- OR-

Alternatively, if you have already chosen to **View** the observation record, within the Observation Details section, select **Edit Observation**.



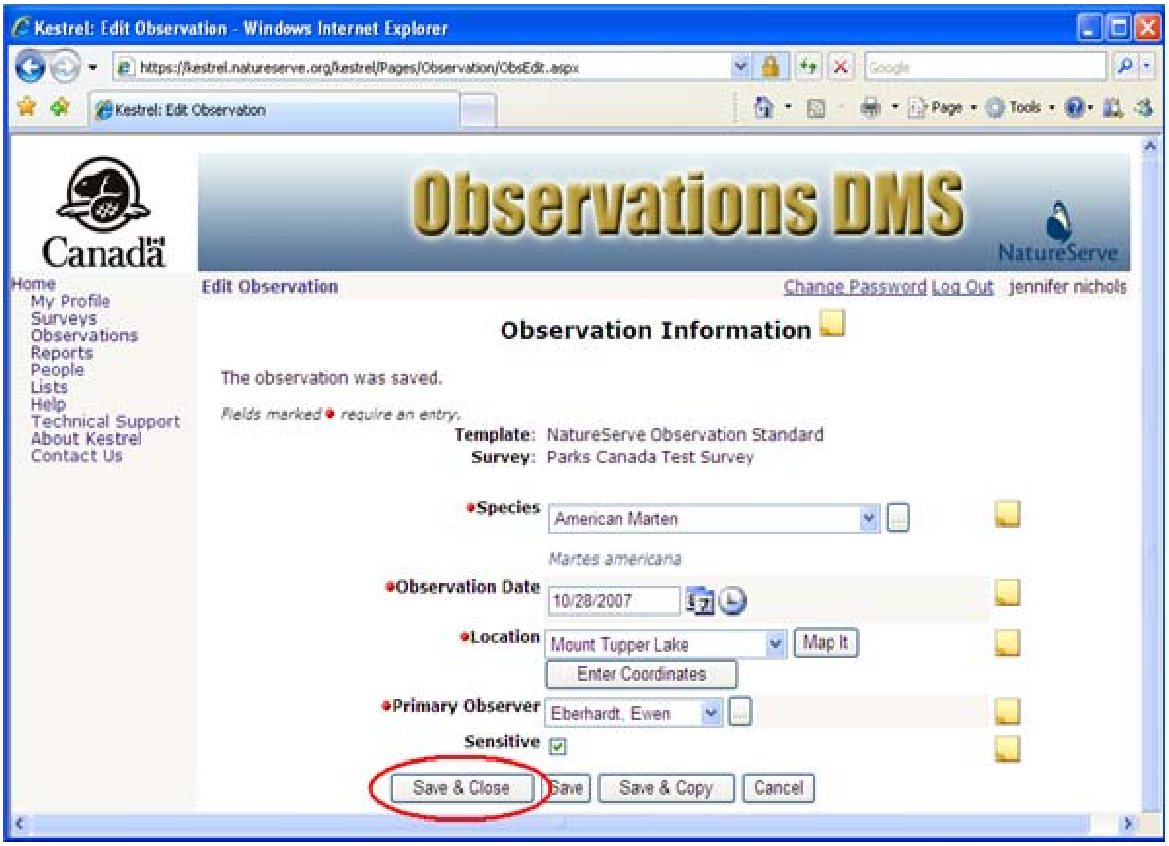
2. Within the *Edit Observation* page, fill out the various fields with appropriate information. The core fields are listed below. For further information on any of the fields, click the appropriate link below.
   - Template - Read Only
   - Survey - Read Only
   - Species - Required
   - Observation Date - Required
   - Location - Required
   - Primary Observer - Required
   - Sensitive
   - Not Found

NOTE: Additional fields are specific to the template used by the survey containing the observation record. Further information regarding these non-core fields can be determined by placing the cursor over the field name, to obtain fly-over help.

3. Click **Save & Close** to save changes and close the observation record.

   NOTE: Other options include:

   - **Save**, which allows you to save the record but continue editing it;
   - **Save & Copy**, which will save the record, create a copy of it and open the new record.

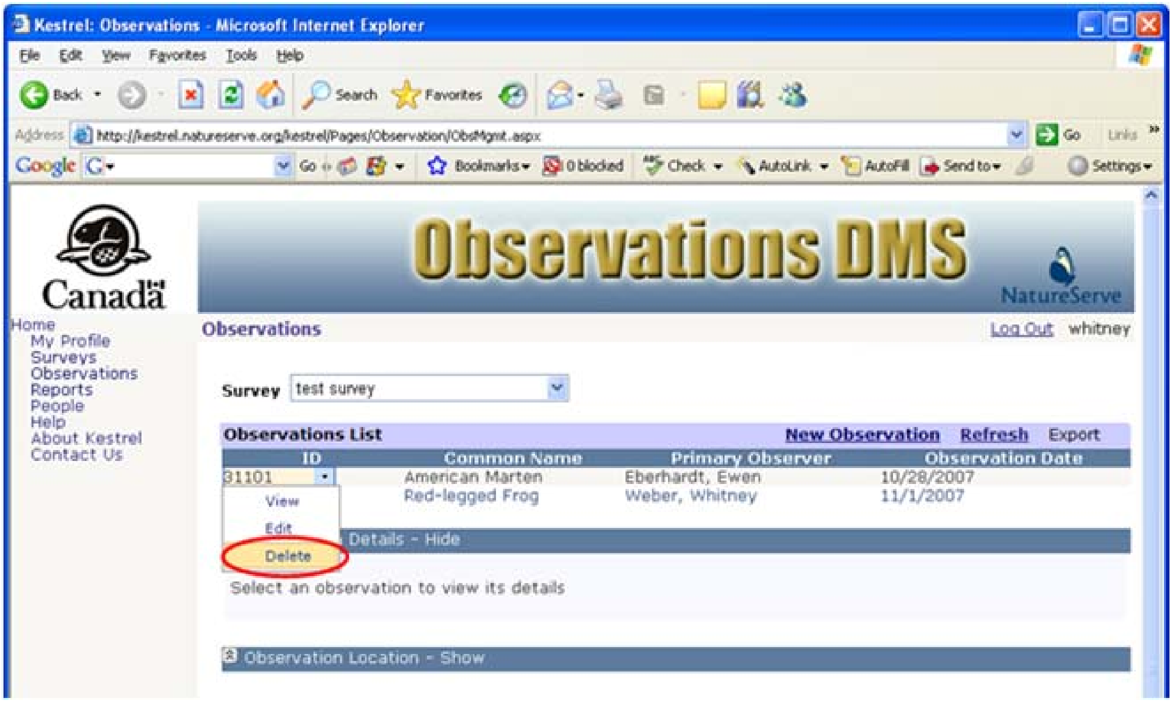


Related Tasks:

- [Select a Species]
- [Create Location]
- [Edit Location]
- [Select Primary Observer]

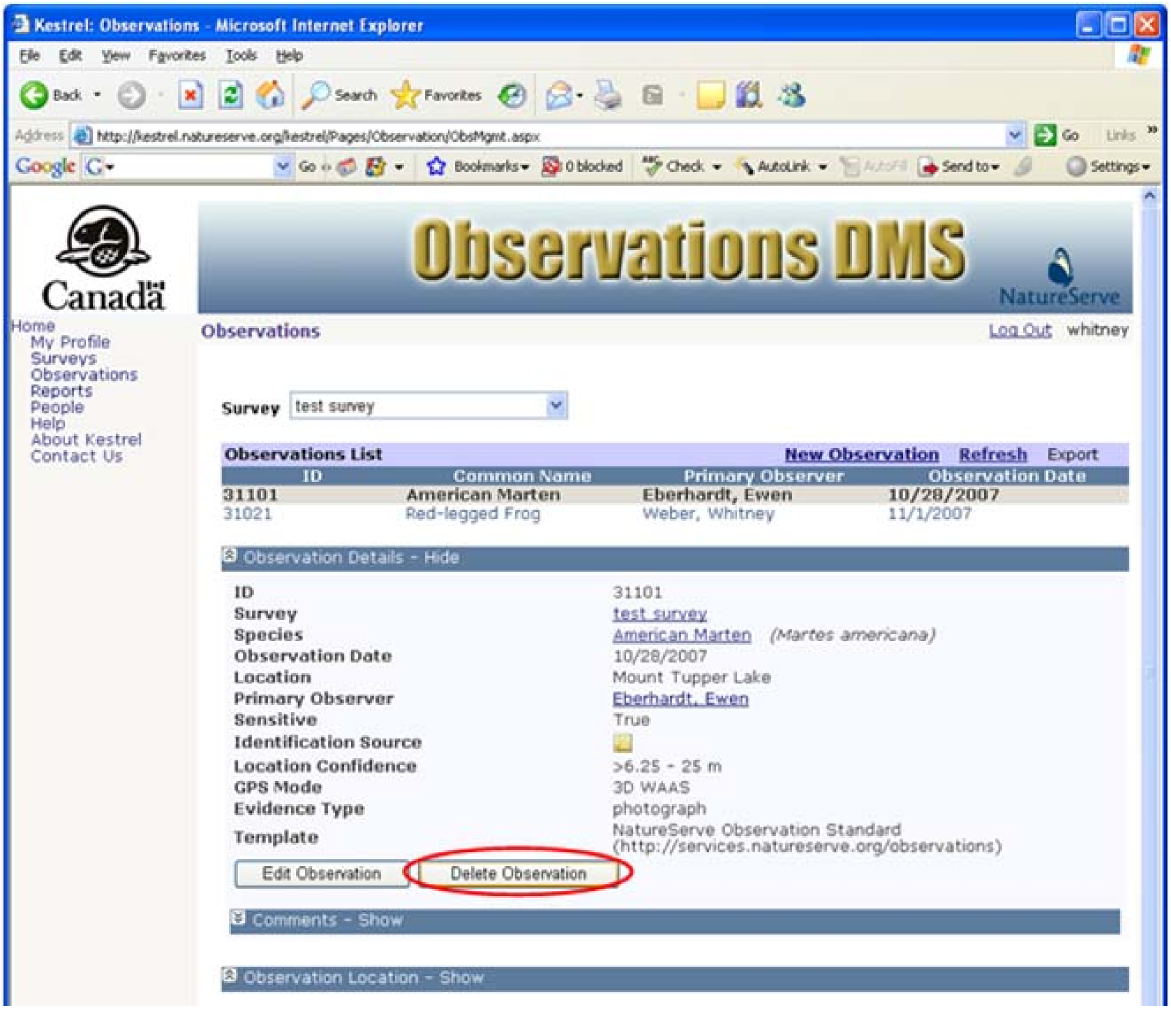
Delete Observation

1. Within the *Observations* page, click on the observation record and from the dropdown list, select to **Delete** the record.

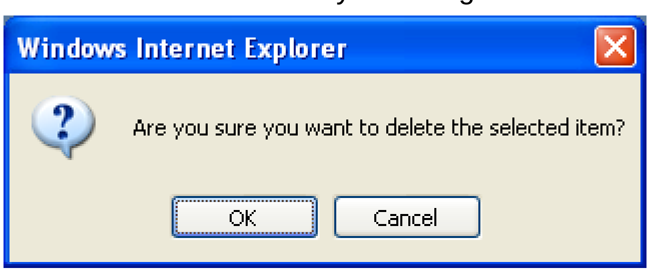


\- OR -

Alternatively, if you have already chosen to **View** the observation record, within the Observation Details section select **Delete Observation**.



2. You have the option to **CANCEL** the deletion at this point or you can proceed to delete the observation record by selecting **OK**.

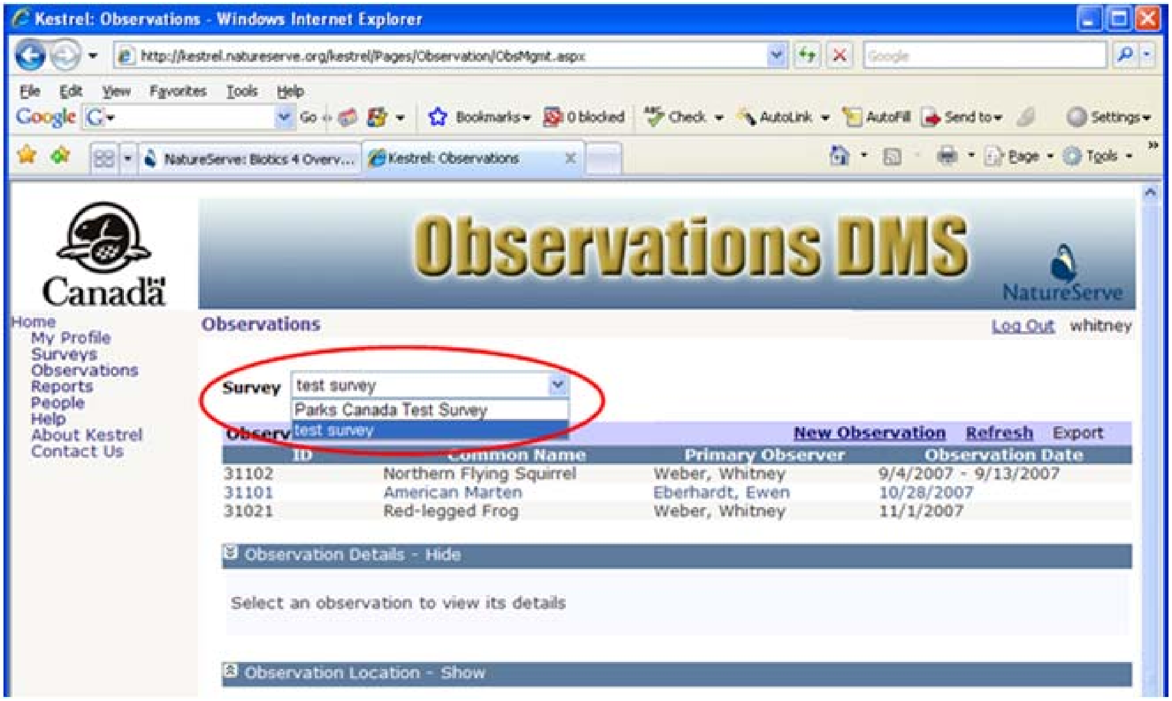


Related Tasks:

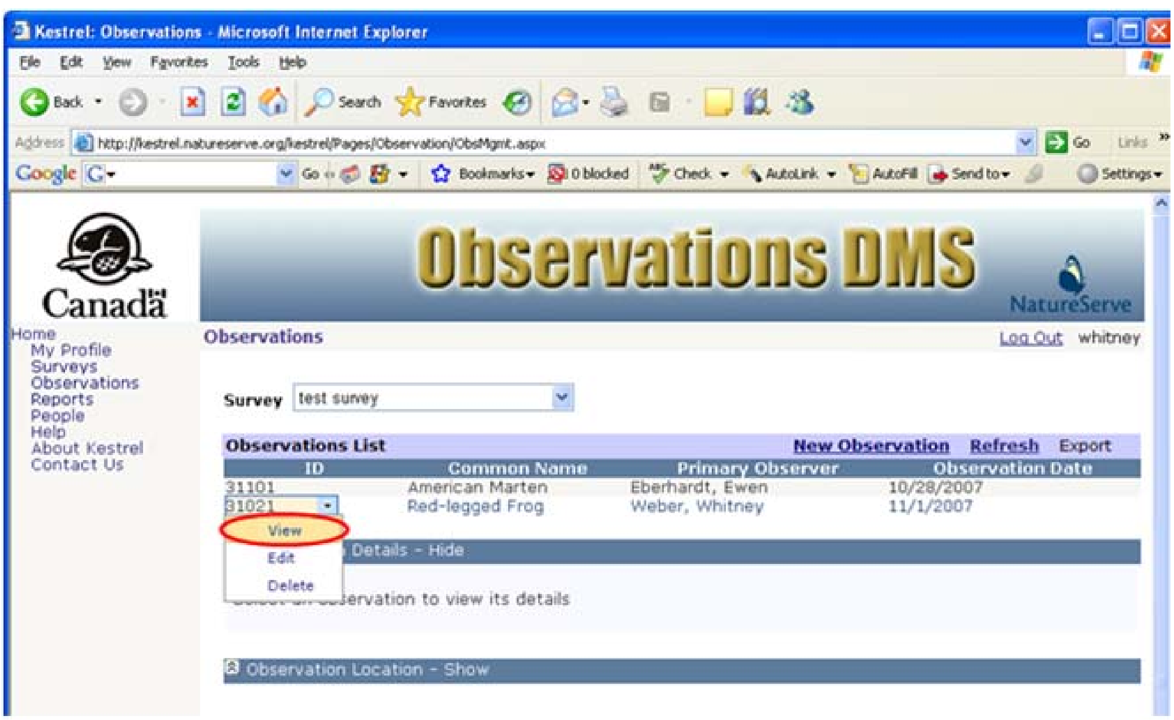
- Create New Observation
- Edit Observation

View Survey

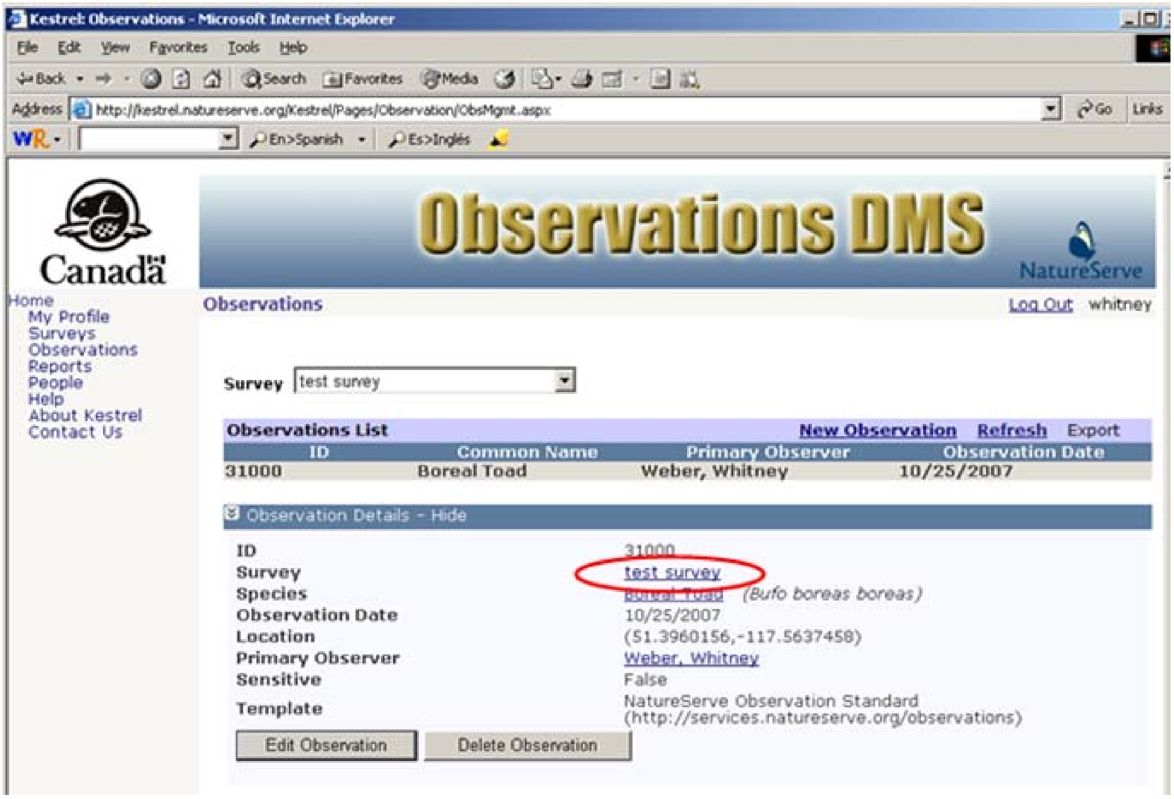
1. Within the *Observations* page, from the **Survey** dropdown list, select the survey containing the observations of interest.



2. Click on an observation record and select **View** from the dropdown list.



3. Within the Observation Details section, click on the Survey link to navigate to the *Survey Details* page.



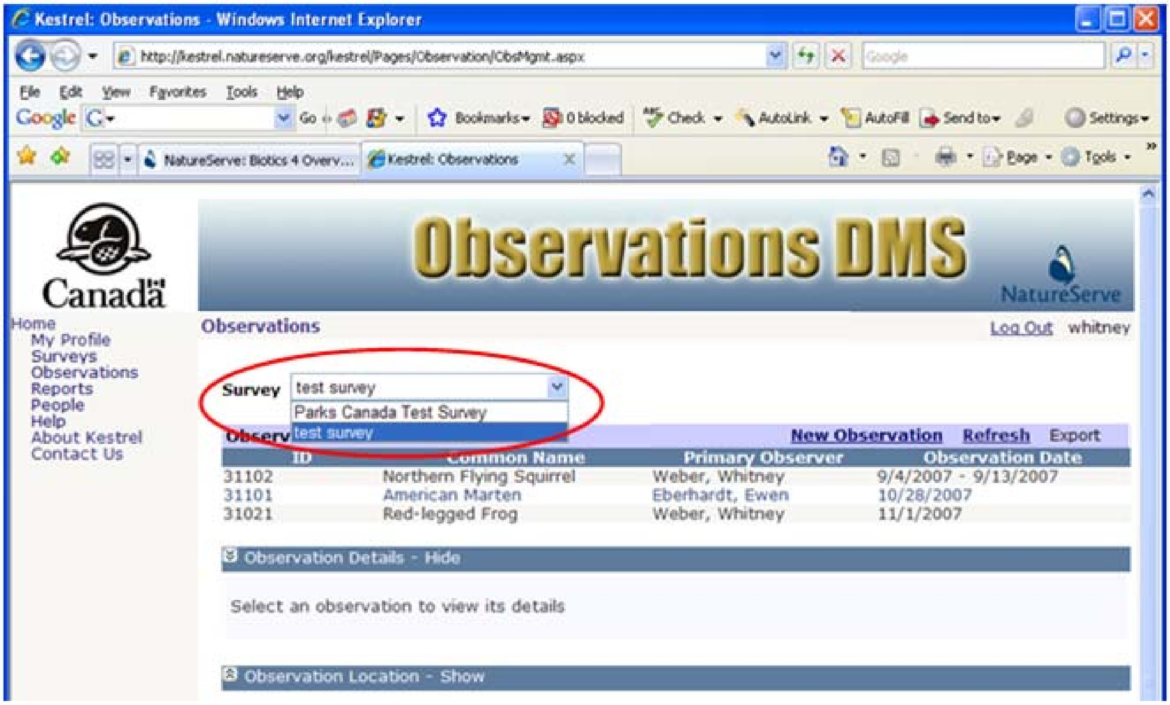
4. Within the *Survey Details* page, choose to **Close** the window, which will return you to the Observations page. Alternatively, choose to **Edit Survey** or **Delete Survey**.

Related Tasks:

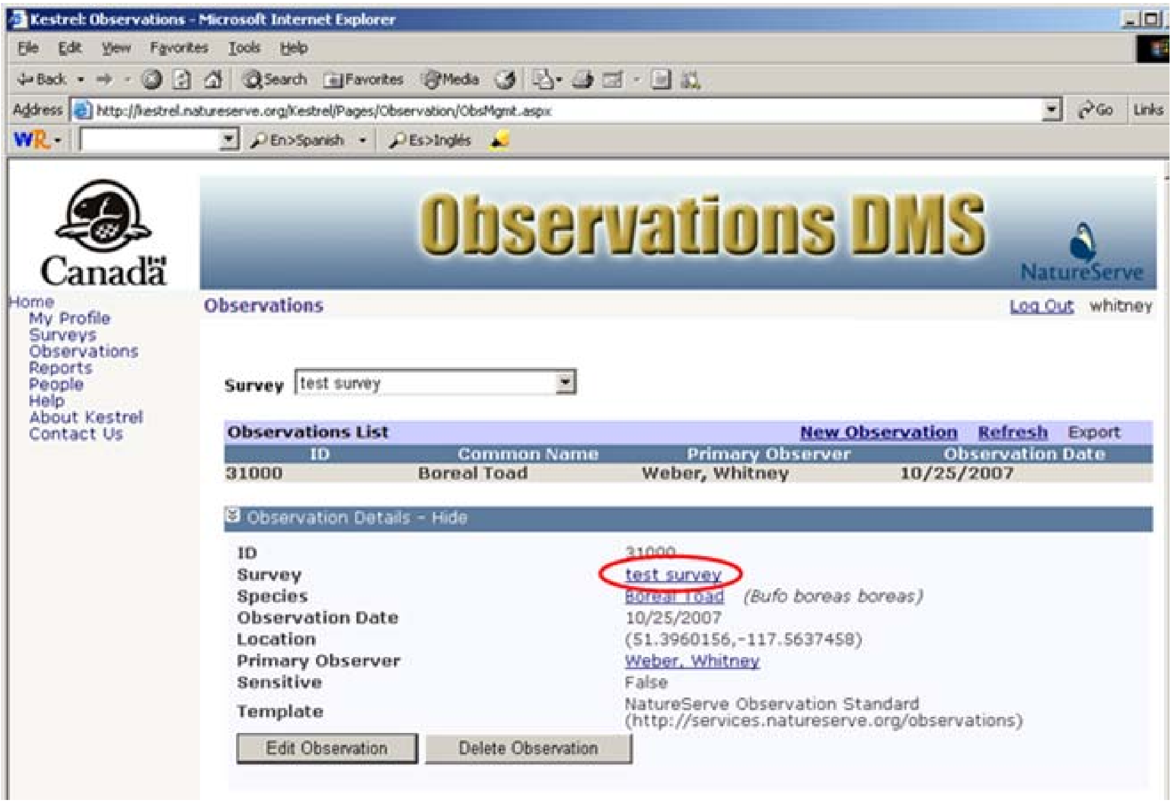
- Edit Survey
- Delete Survey

Edit Survey

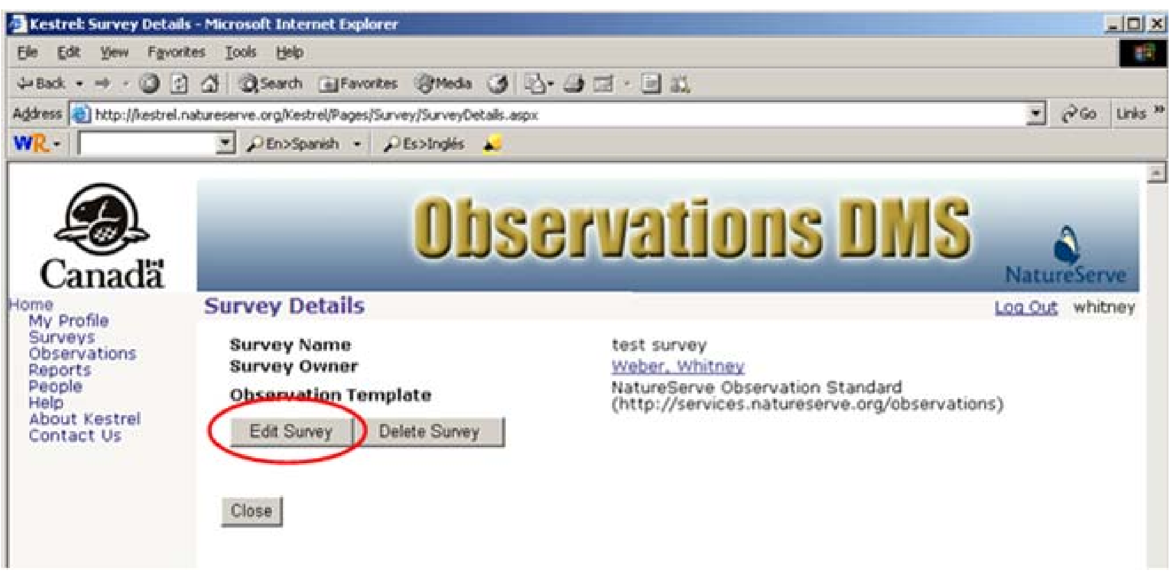
1. Within the *Observations* page, from the **Survey** dropdown list, select the survey containing the observations of interest.



2. Click on an observation record and select **View** from the dropdown list.
3. Within the Observation Details section, click on the survey link to navigate to the *Survey Details* page.

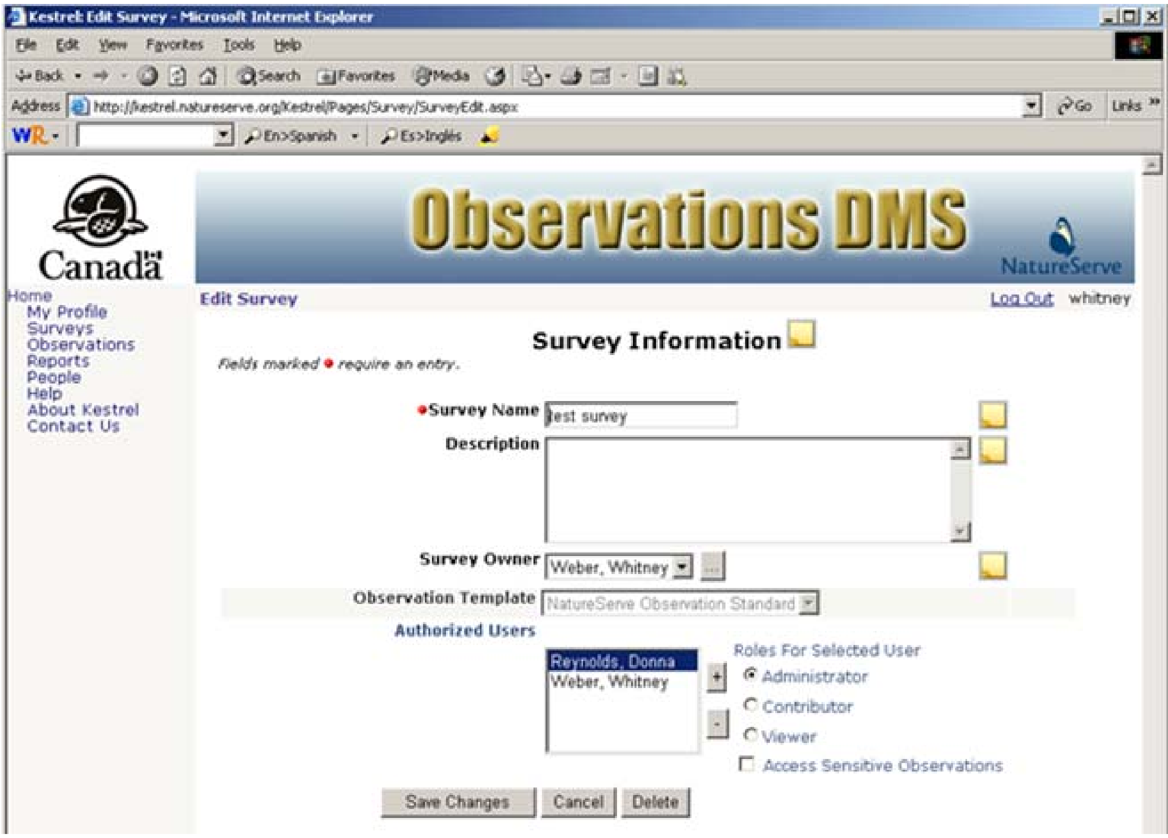


4. Within the *Survey Details* page, click **Edit Survey** which will take you to the *Edit Survey* page.

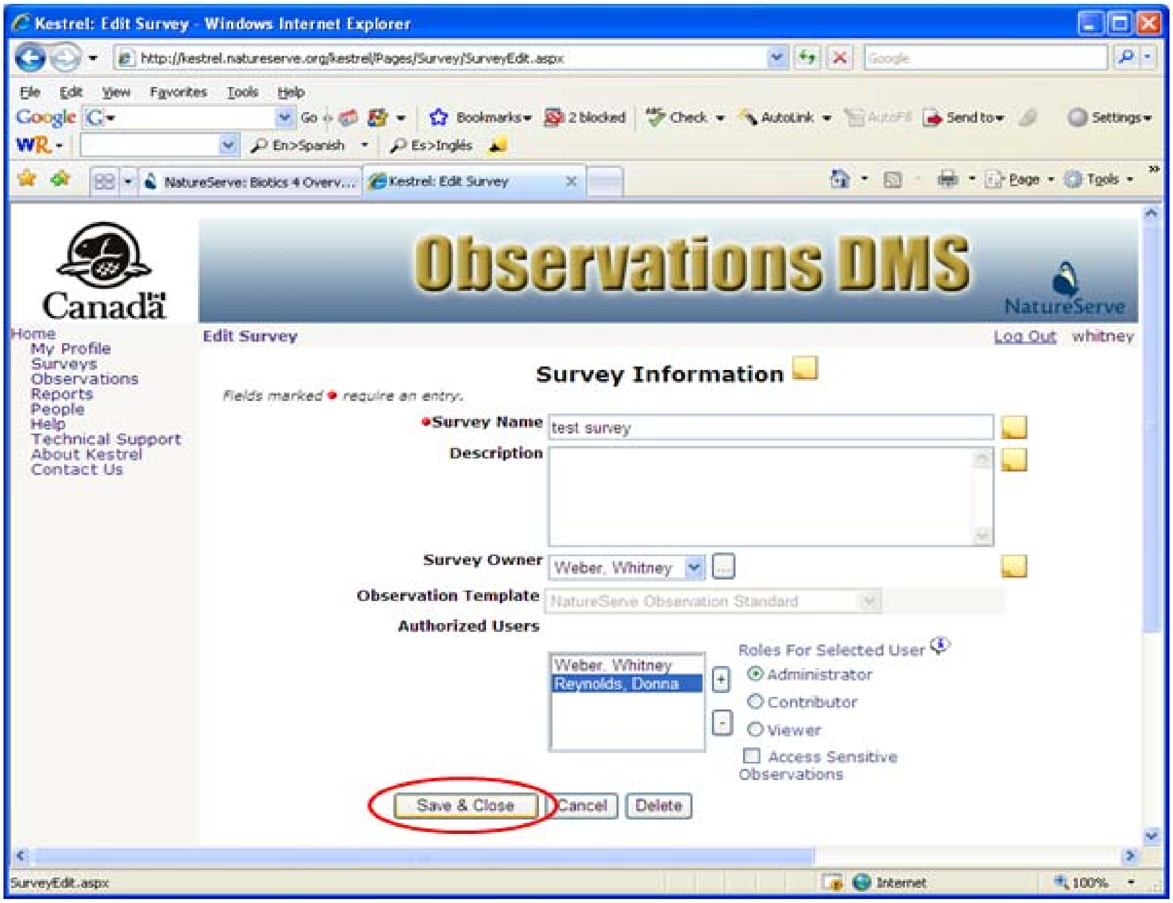


5. Within the *Edit Survey* page, fill out the various fields with appropriate. For further information on any of the fields, click the appropriate link below.
   - Survey Name - Required
   - Description

- Survey Owner
- Observation Template
- Authorized Users
- Roles for Selected User
- Access Sensitive Observations



6. **Save & Close** the survey.

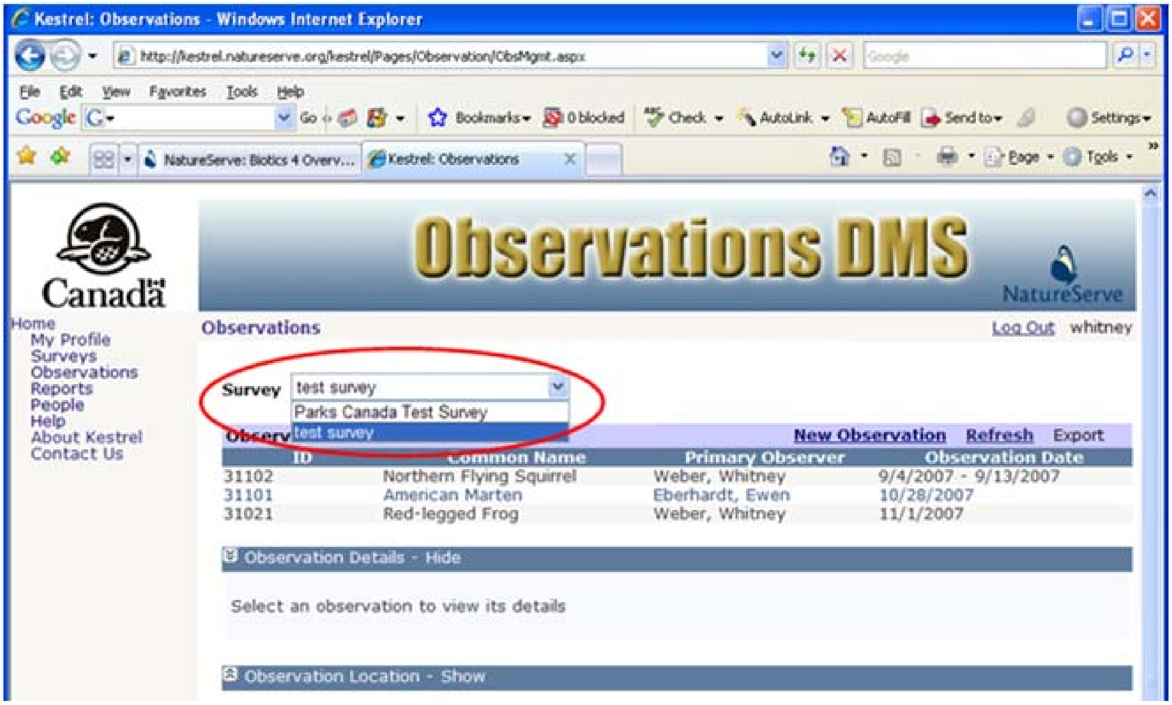


Related Tasks:

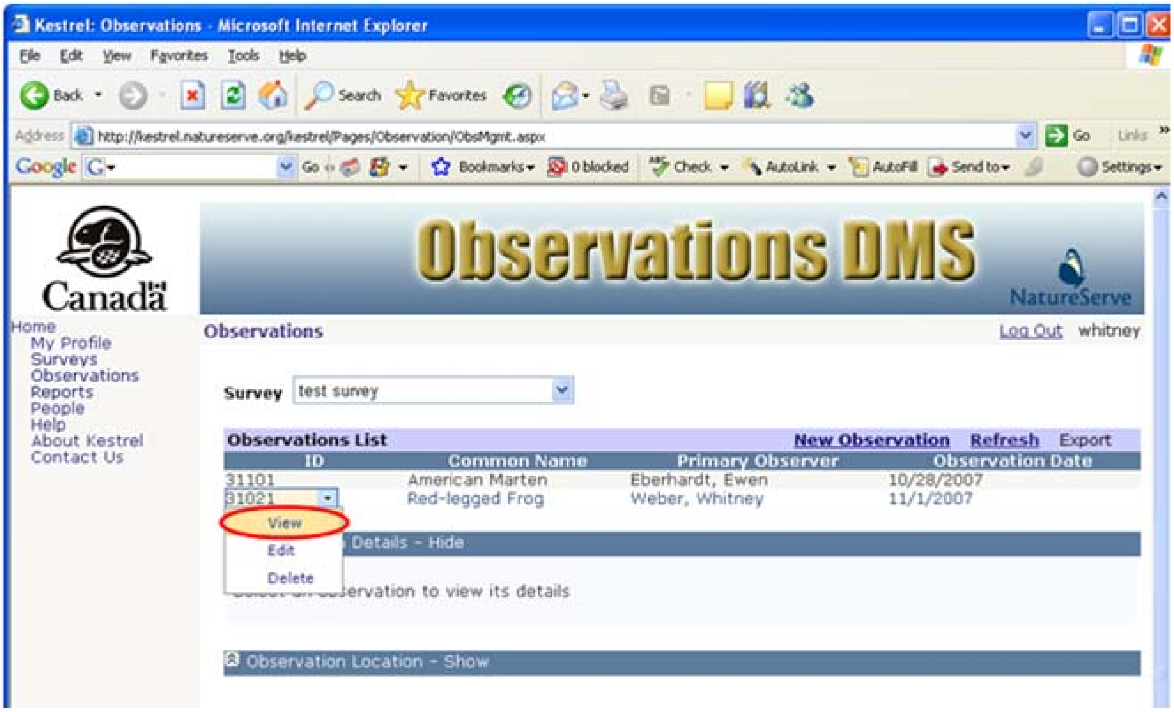
- Select Survey Owner
- Add Authorized User

Delete Survey

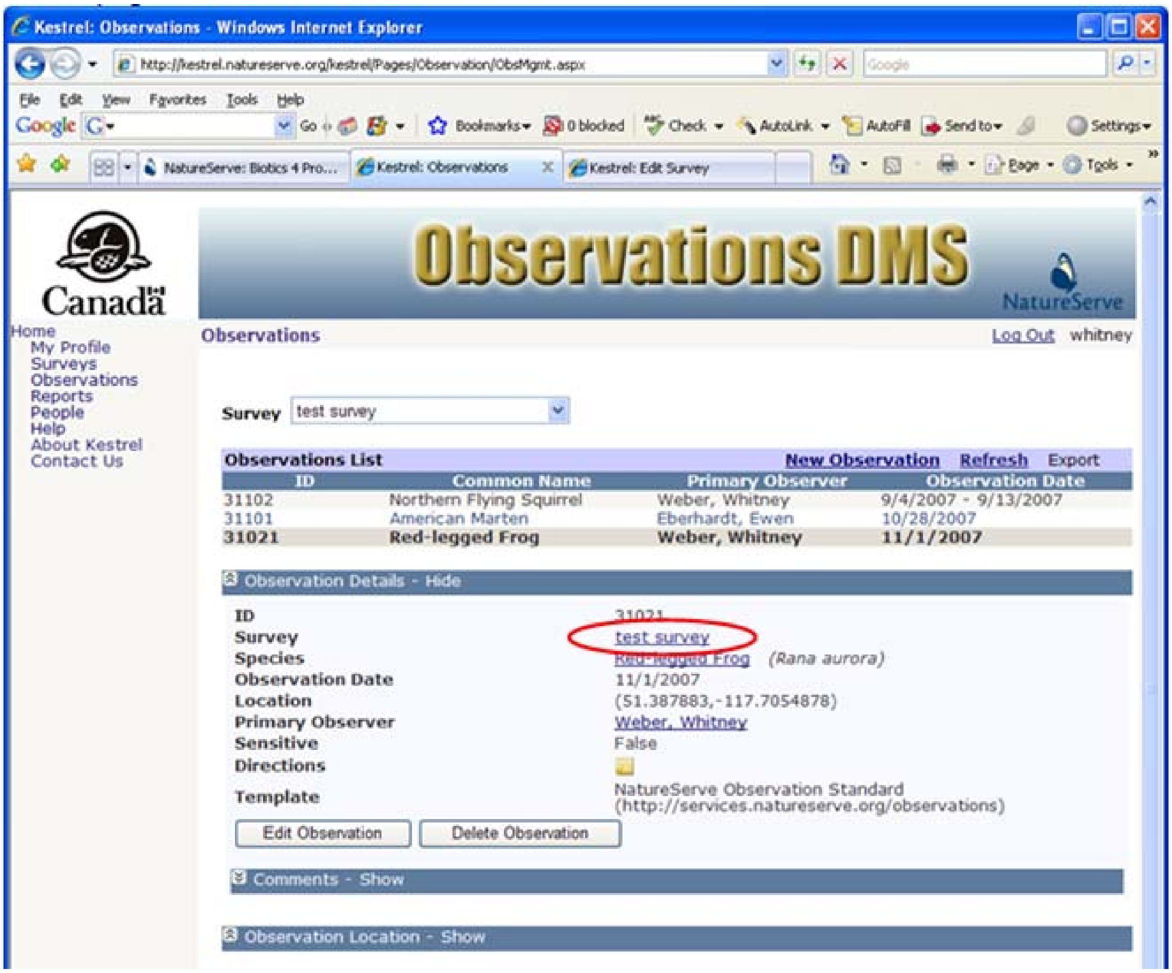
1. Within the *Observations* page, from the **Survey** dropdown list, select the survey containing the observations of interest.



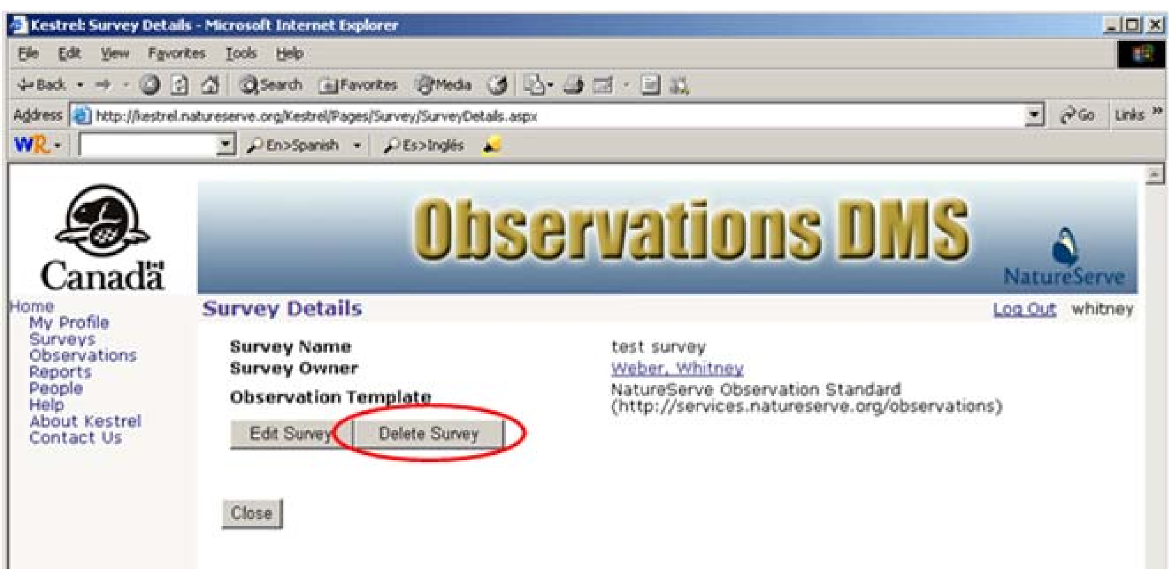
2. Within the *Observations* page, click on an observation record and from the dropdown list select to **View** the observation record.



3. Within the Observation Details section, click on the survey link to navigate to the *Survey Details* page.



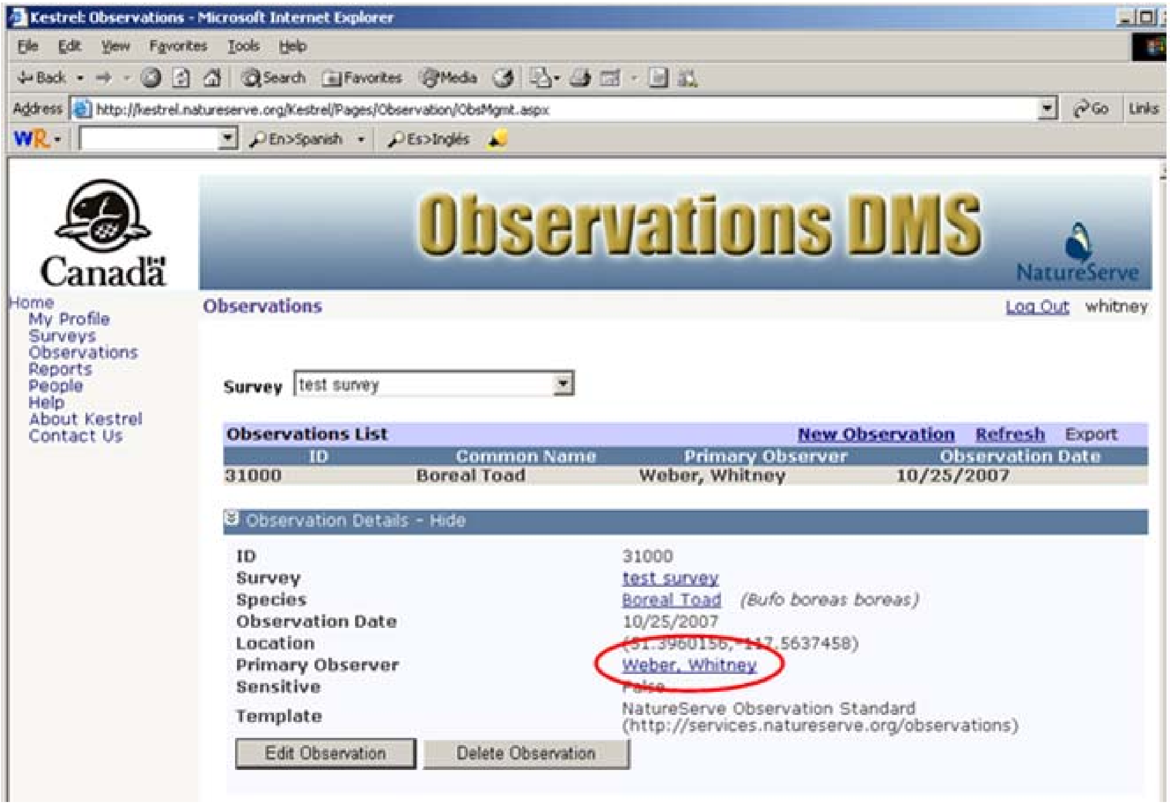
4. Within the *Survey Details* page, click **Delete Survey**.



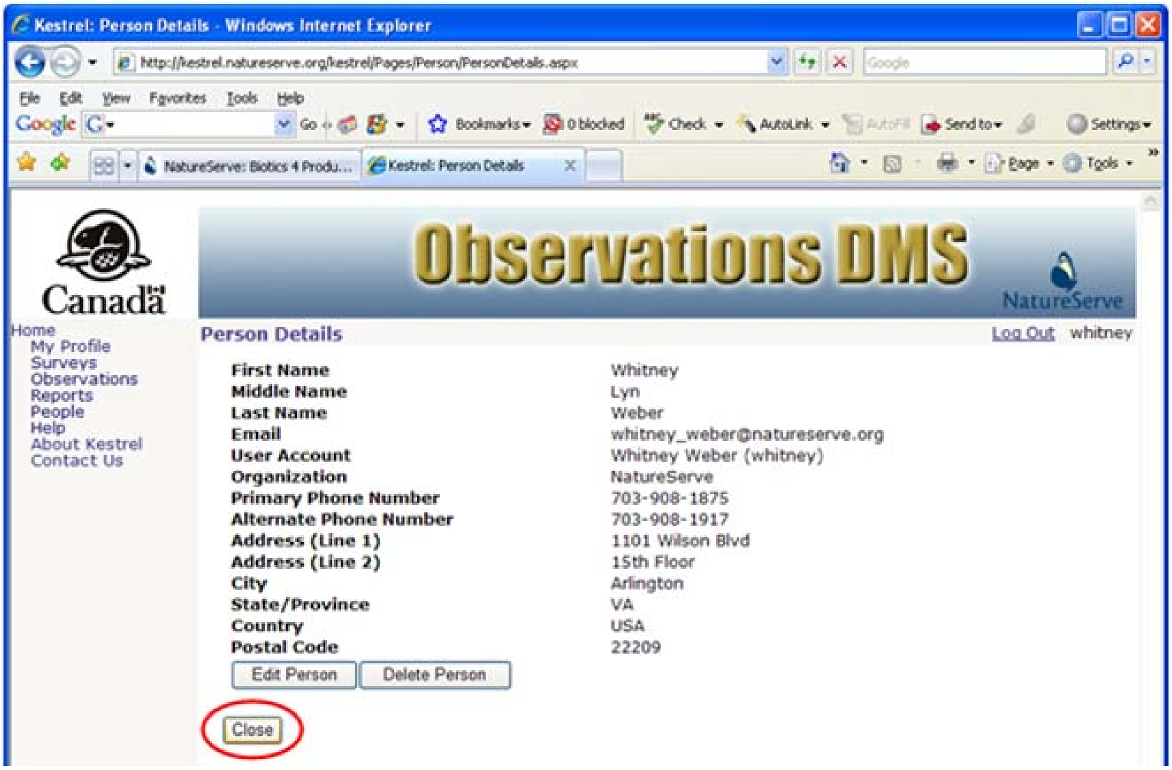
5. If a survey already contains observations, all observations container within that survey will be deleted. You have the option to **CANCEL** the deletion at this point or you can proceed to delete the survey and all of its observations by clicking **OK**.

View Person

1. Within the *Observations* page, **View** an observation record.
2. Within the Observation Details section, click on the Primary Observer link to navigate to the *Person Details* page.



3. Within the *Person Details* page, choose to **Close** the window, which will return you to the Observations page. Alternatively, choose to **Edit Person** or **Delete Person**.

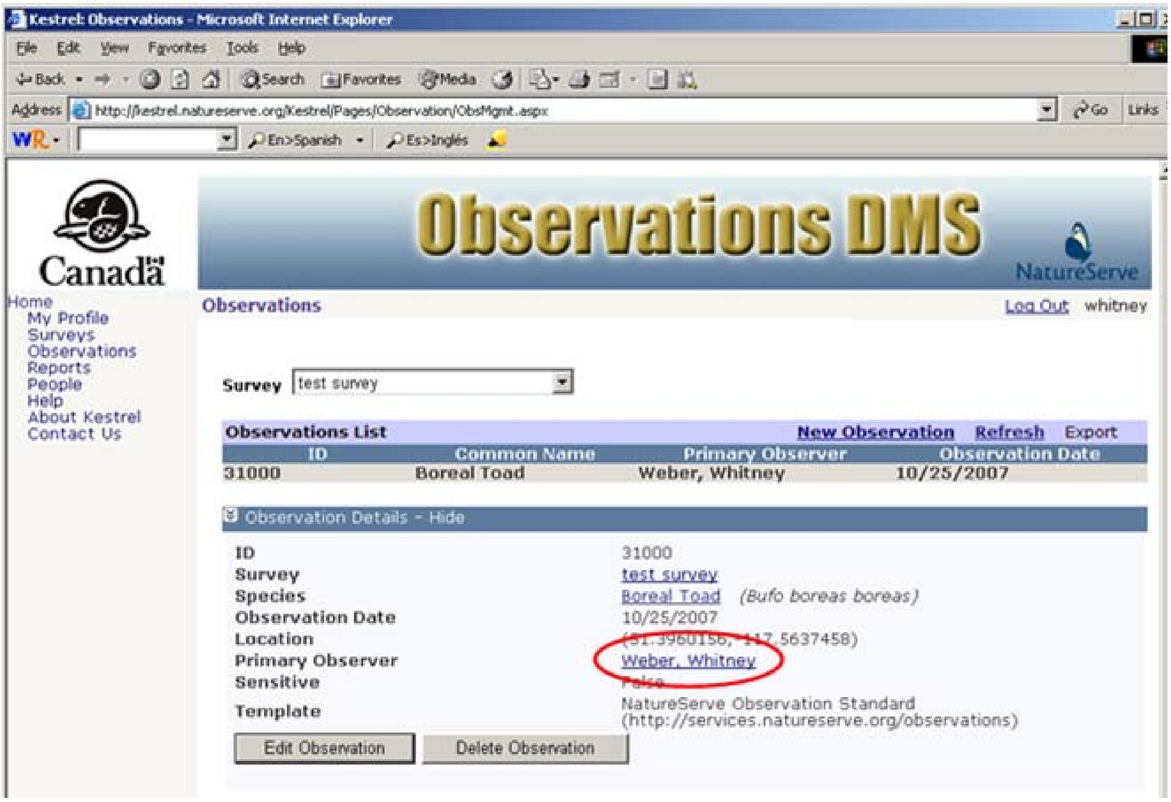


Related Tasks:

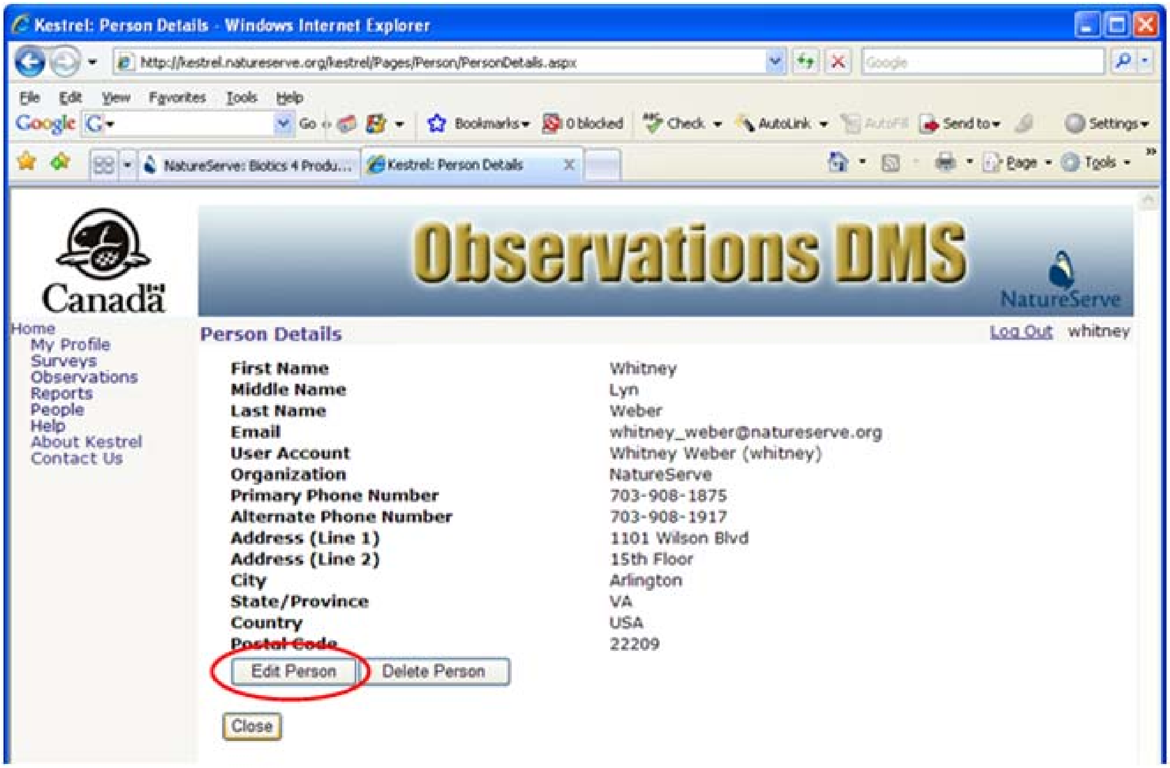
- Edit Person
- Delete Person

Edit Person

1. Within the *Observations* page, **View** an observation record.
2. Within the Observation Details section, click on the Primary Observer link to navigate to the *Person Details* page.

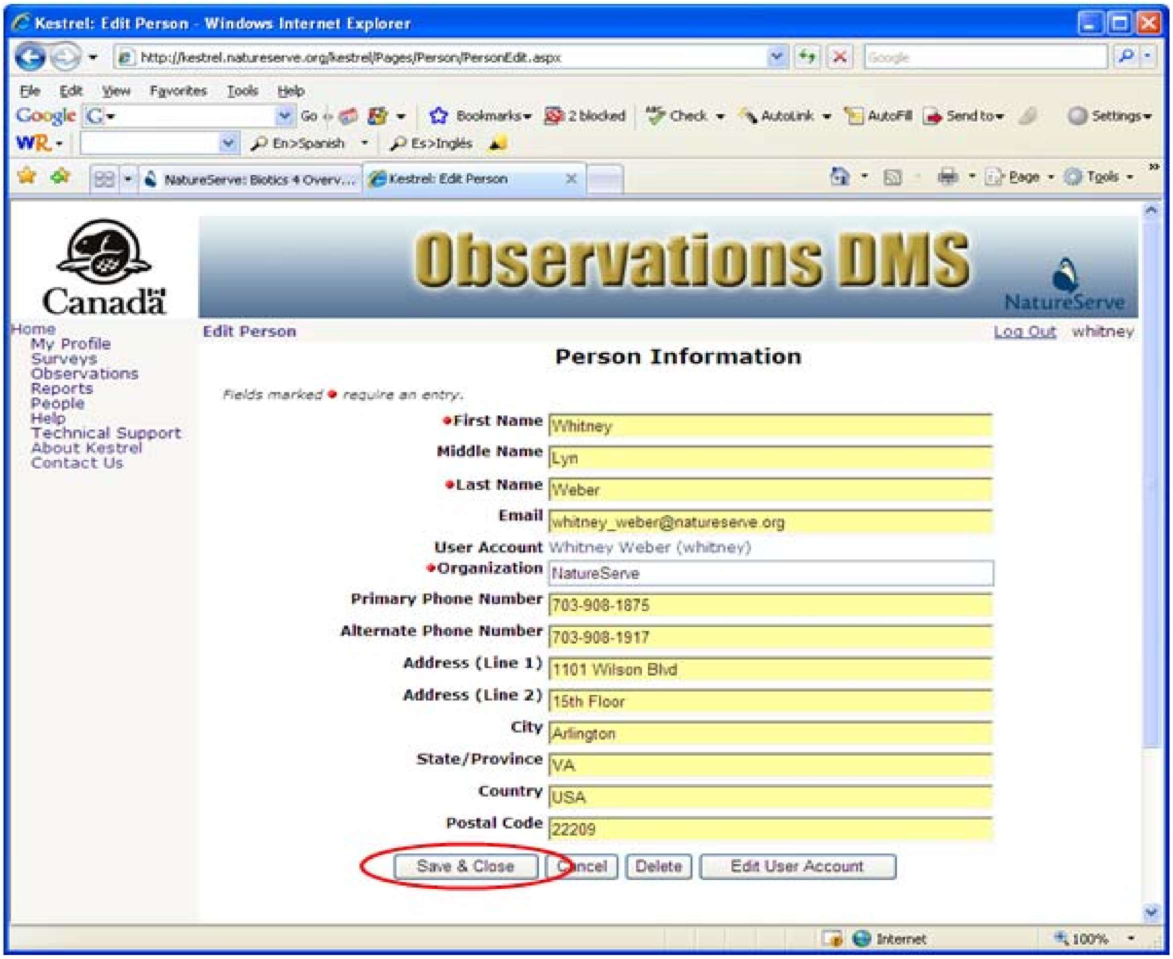


3. Within the *Person Details* page, choose to **Edit Person**.



4. Within the *Edit Person* page, fill out the various fields as appropriate. For further information on any of the fields, click the appropriate link below.
   - First Name - Required
   - Middle Name
   - Last Name - Required
   - Email
   - User Account - Read Only
   - Organization - Required
   - Primary Phone Number
   - Alternate Phone Number
   - Address (Line 1)
   - Address (Line 2)
   - City
   - State/Province
   - Country
   - Postal Code

5. **Save & Close** the person record.



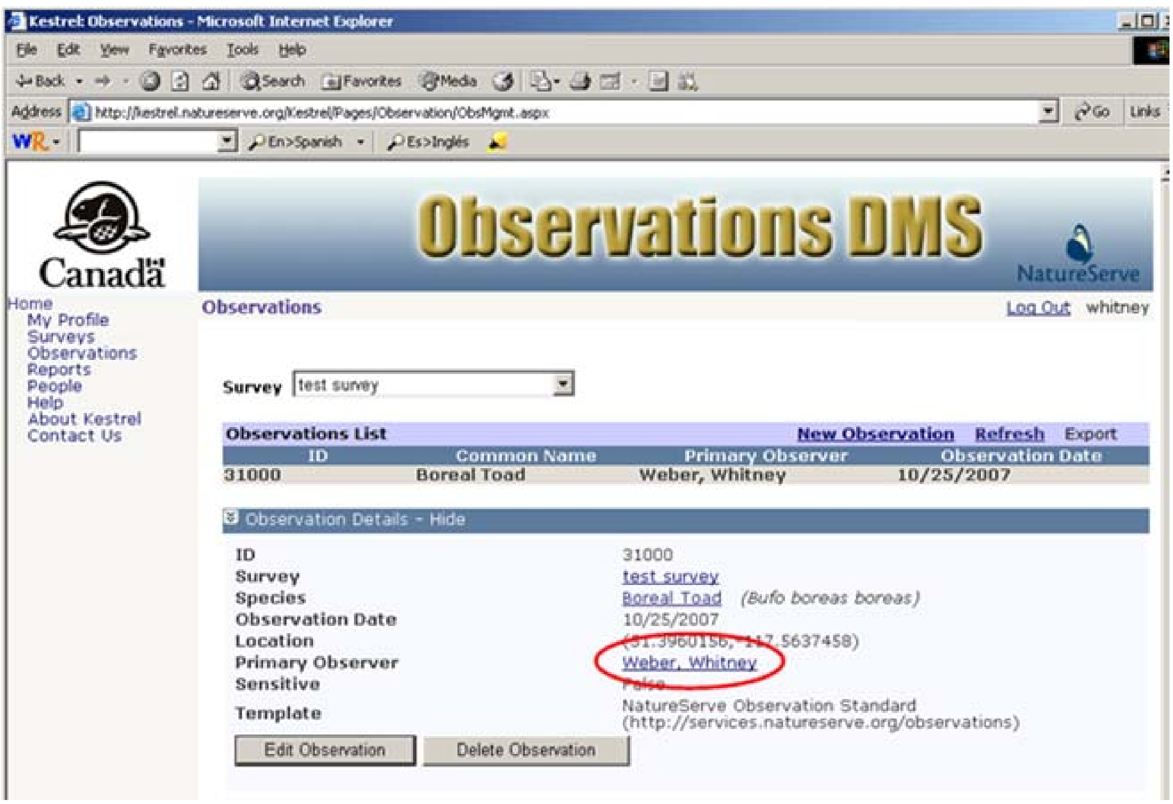
Related Tasks:

- Edit User Account
- Delete Person

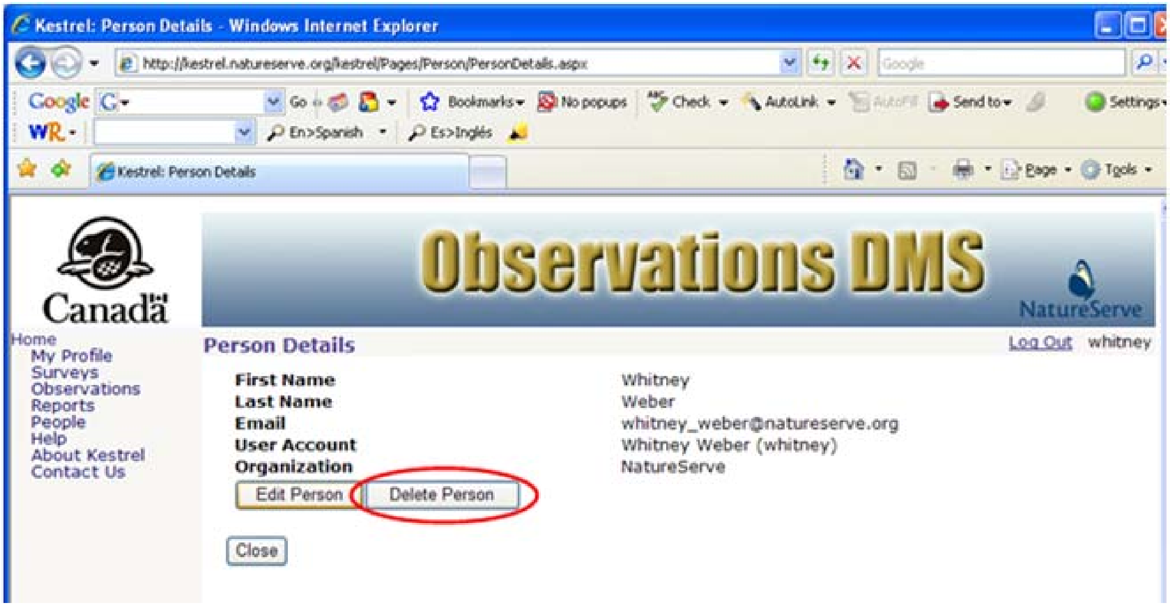
Delete Person

NOTE: A person record cannot be deleted if it is referenced as a Primary Observer within one or more observations or as a Survey Owner. Attempting to delete such a person record will result in the following message:

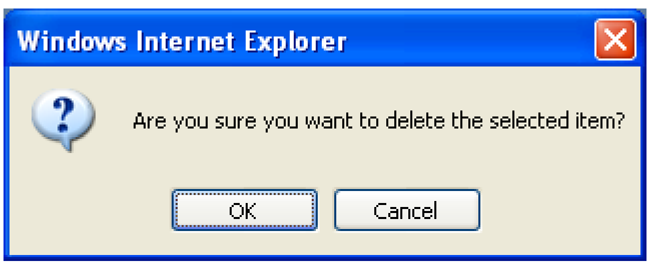
1. Within the *Observations* page, **View** an observation record.
2. Within the Observation Details section, click on the Primary Observer link to navigate to the *Person Details* page.



3. Within the *Person Details* page, select **Delete Person**.



4. A popup window will prompt you as to whether you truly want to delete the Person. Click **OK** to delete the person or **Cancel** the deletion process.



Related Tasks:

- Edit Person

Mapping Tools

Zoom in

Zoom out

Pan

Return to the full extent of the map

Identify

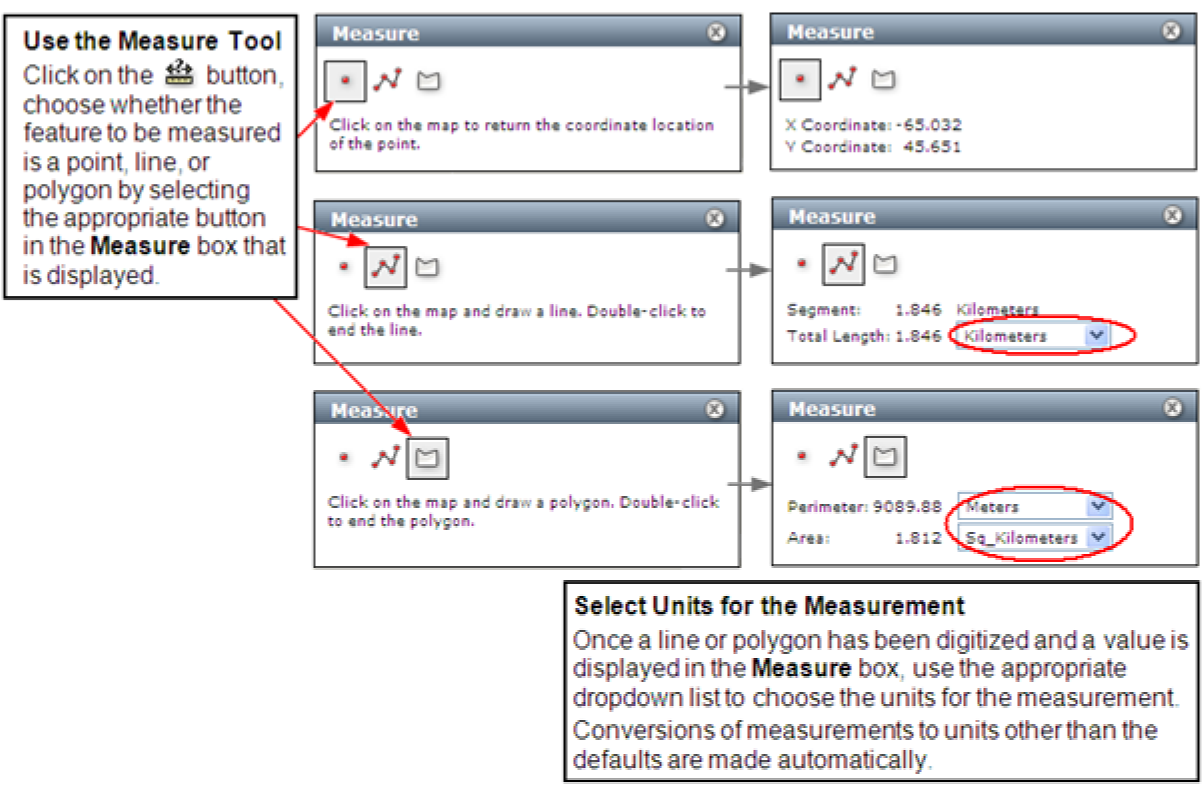
Measure

Return to the previous extent

Draw point

Draw polygon

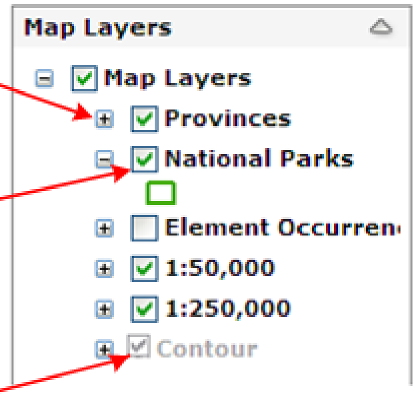
Clear all graphics

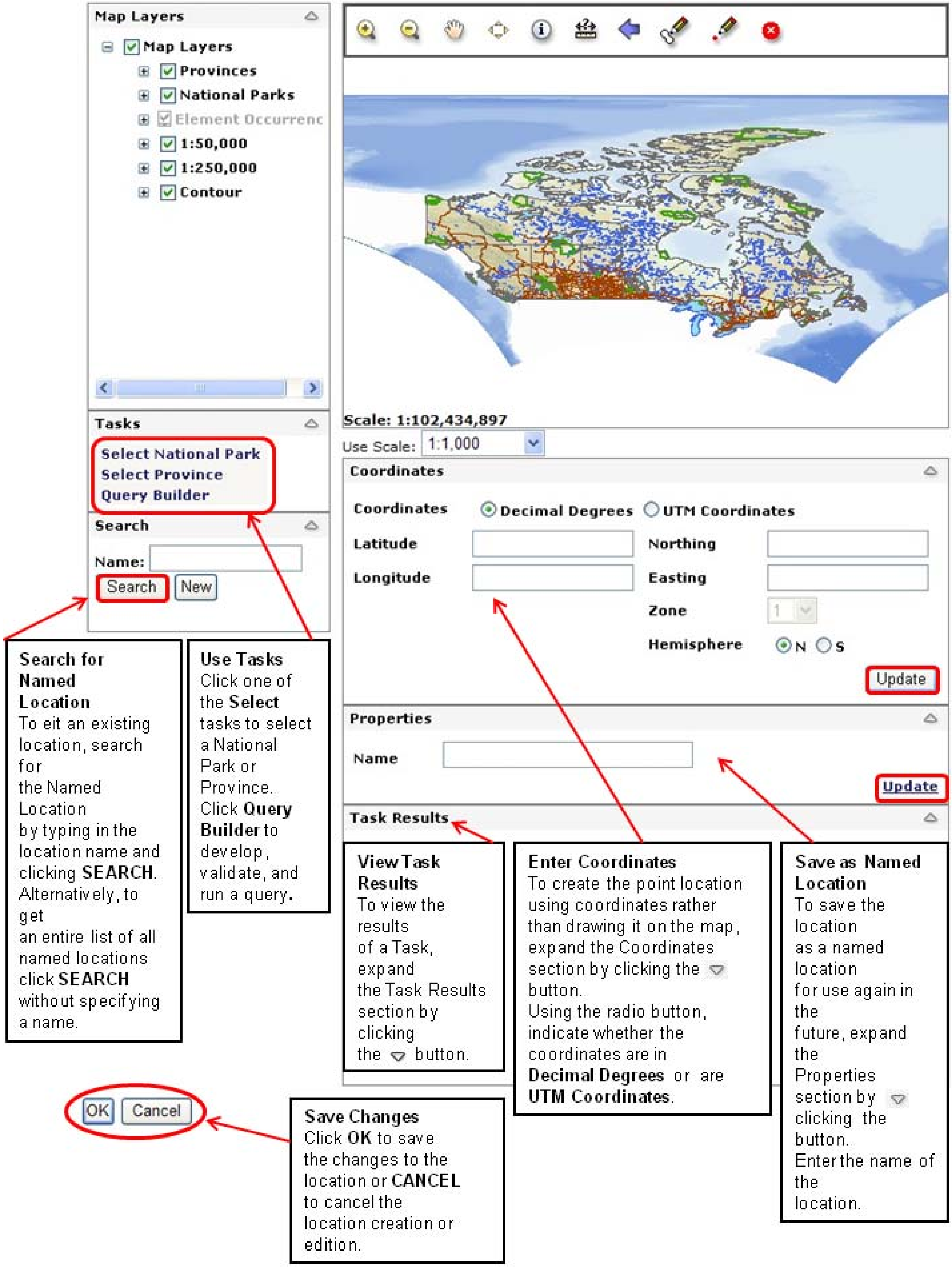


Expand the contents of the Map Layers to view their legends or see what layers are contained within a grouping by clicking the ⊞ icon.

To make a theme visible click the ☑ box so the check is present. To make the theme invisible, click it again so the checkmark is not present.

Certain layers are shown only at specific scales. Once outside the range of that scale, they will not be displayed. Zoom further in or out to display these layers.




Map Layers
Map Layers
Provinces
National Parks
Element Occurrenc
1:50,000
1:250,000
Contour
Tasks
Select National Park
Select Province
Query Builder
Search
Name:
Search
New
Scale: 1:102,434,897
Use Scale: 1:1,000
Coordinates
Coordinates
Decimal Degrees
UTM Coordinates
Latitude
Longitude
Northing
Easting
Zone
Hemisphere
N
S
Update
Properties
Name
Update
Task Results
Search for Named Location
To eit an existing location, search for the Named Location by typing in the location name and clicking SEARCH. Alternatively, to get an entire list of all named locations click SEARCH without specifying a name.
Use Tasks
Click one of the Select tasks to select a National Park or Province. Click Query Builder to develop, validate, and run a query.
View Task Results
To view the results of a Task, expand the Task Results section by clicking the button.
Enter Coordinates
To create the point location using coordinates rather than drawing it on the map, expand the Coordinates section by clicking the button.
Using the radio button, indicate whether the coordinates are in Decimal Degrees or are UTM Coordinates.
Save as Named Location
To save the location as a named location for use again in the future, expand the Properties section by clicking the button.
Enter the name of the location.
OK
Cancel
Save Changes
Click OK to save the changes to the location or CANCEL to cancel the location creation or edition.

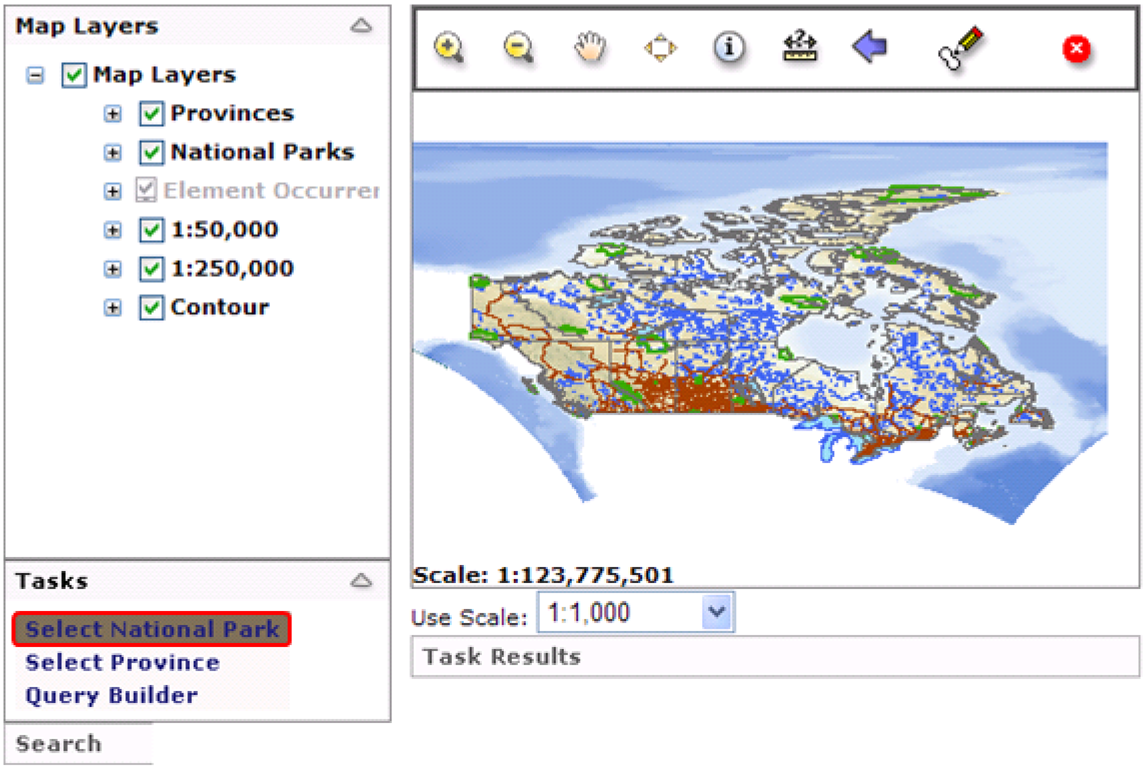
Related Tasks:

- Create New Location
- Edit Location
- Select Tasks
- Use Query Builder
- Define Report Criteria according to Mapped Location

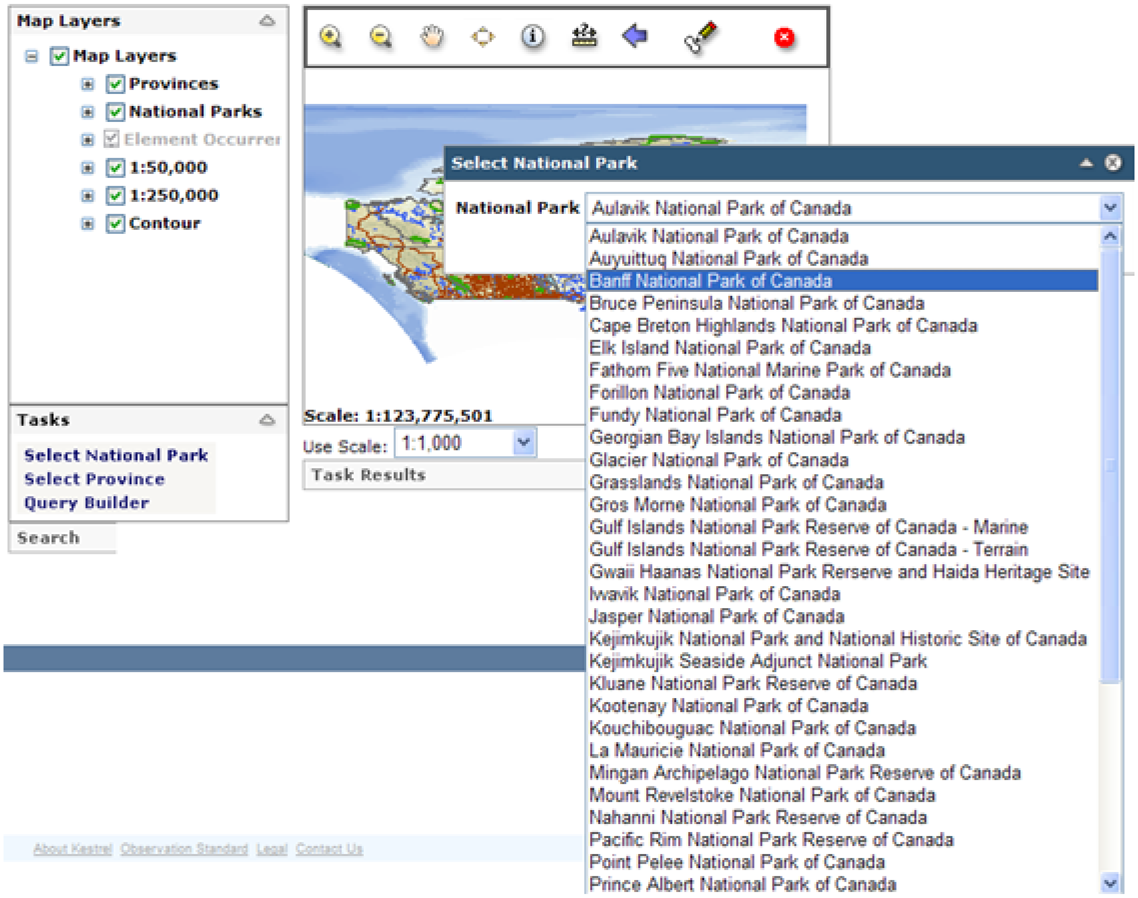
Select Tasks

The Select tasks allow the user to select features in a layer via a dropdown menu.

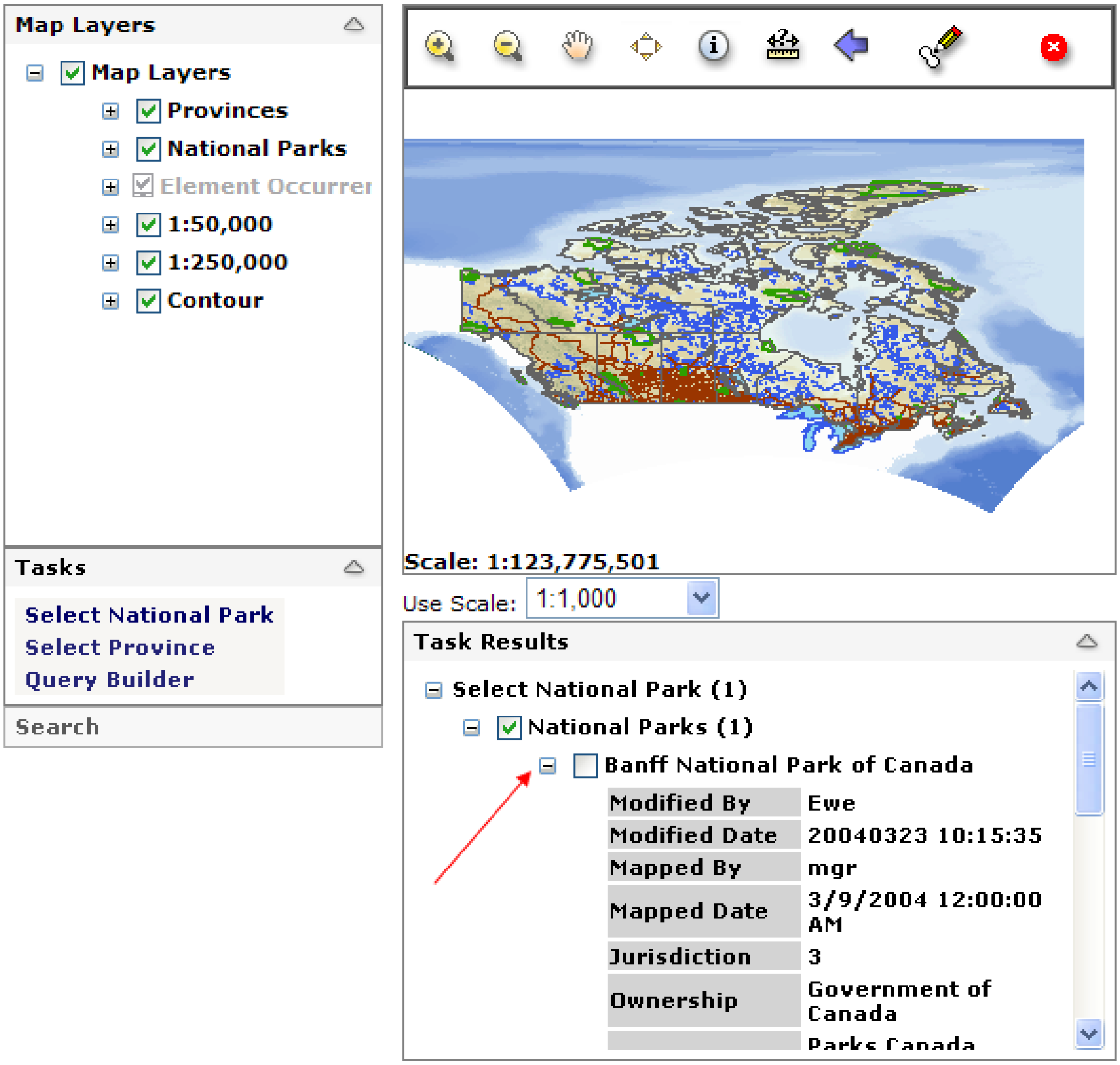
1. Within the mapping component, expand the Tasks section located under the Map Layers by clicking the button.
2. Click the desired Select task (ie. Select National Park or Select Province).



3. From the dropdown list, select the desired location and click Find.



4. To view the results, expand the Task Results section under the map by clicking the button. Results are displayed in a hierarchical tree format with nodes marked by a plus or minus sign.
   - Click + next to an entry to expand the node and reveal its subordinate units
   - Click &endash; next to an expanded node to collapse it.



NOTE: In cases where multiple queries have been run and results not deleted following each query, the results of the most recent query are displayed at the top of the list in the Task Results section. The order of the results in the list reflects the sequence in which the queries were run, with the bottom of the list resulting from the first query that was run in the session.

5. Right-click on an entry in the results set to perform the following actions:
   - Zoom to the specified location
   - Draw Feature Shape &endash; allows the user to define the Report Criteria according to the location
   - Pan to the specified location
   - Remove the specified entry from the Task Results section

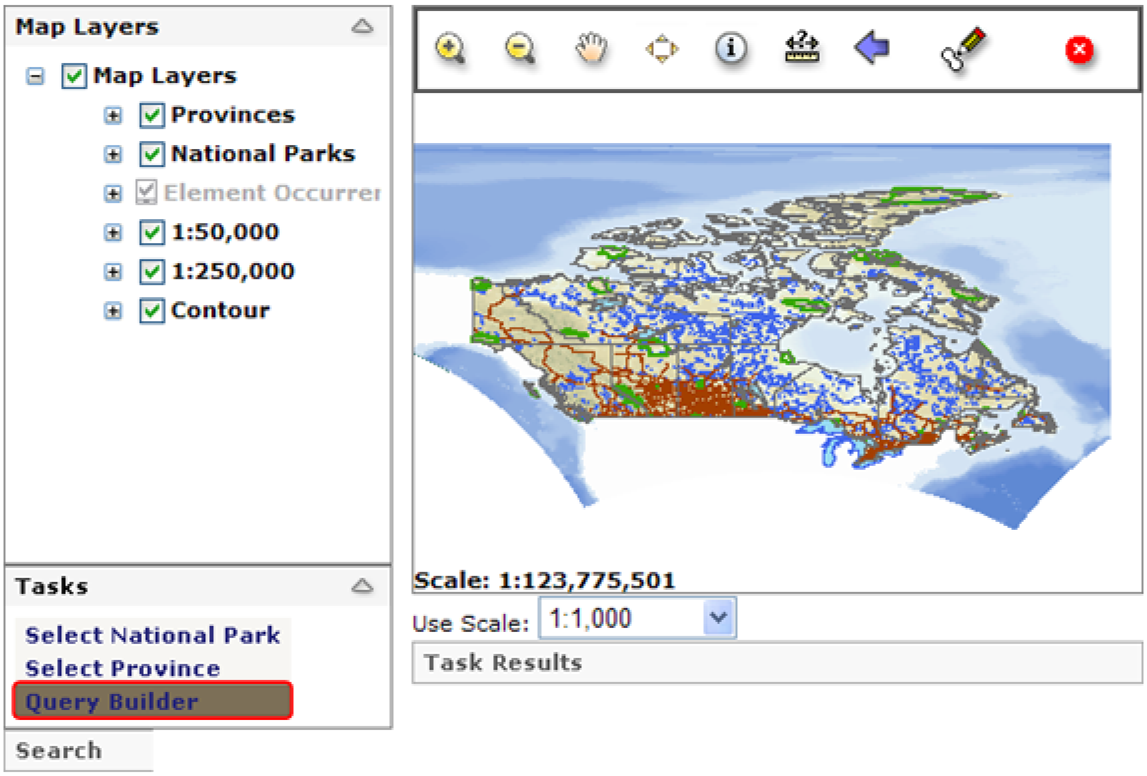
Related Tasks:

- Define Report Criteria acording to Mapped Location

Query Builder Tool

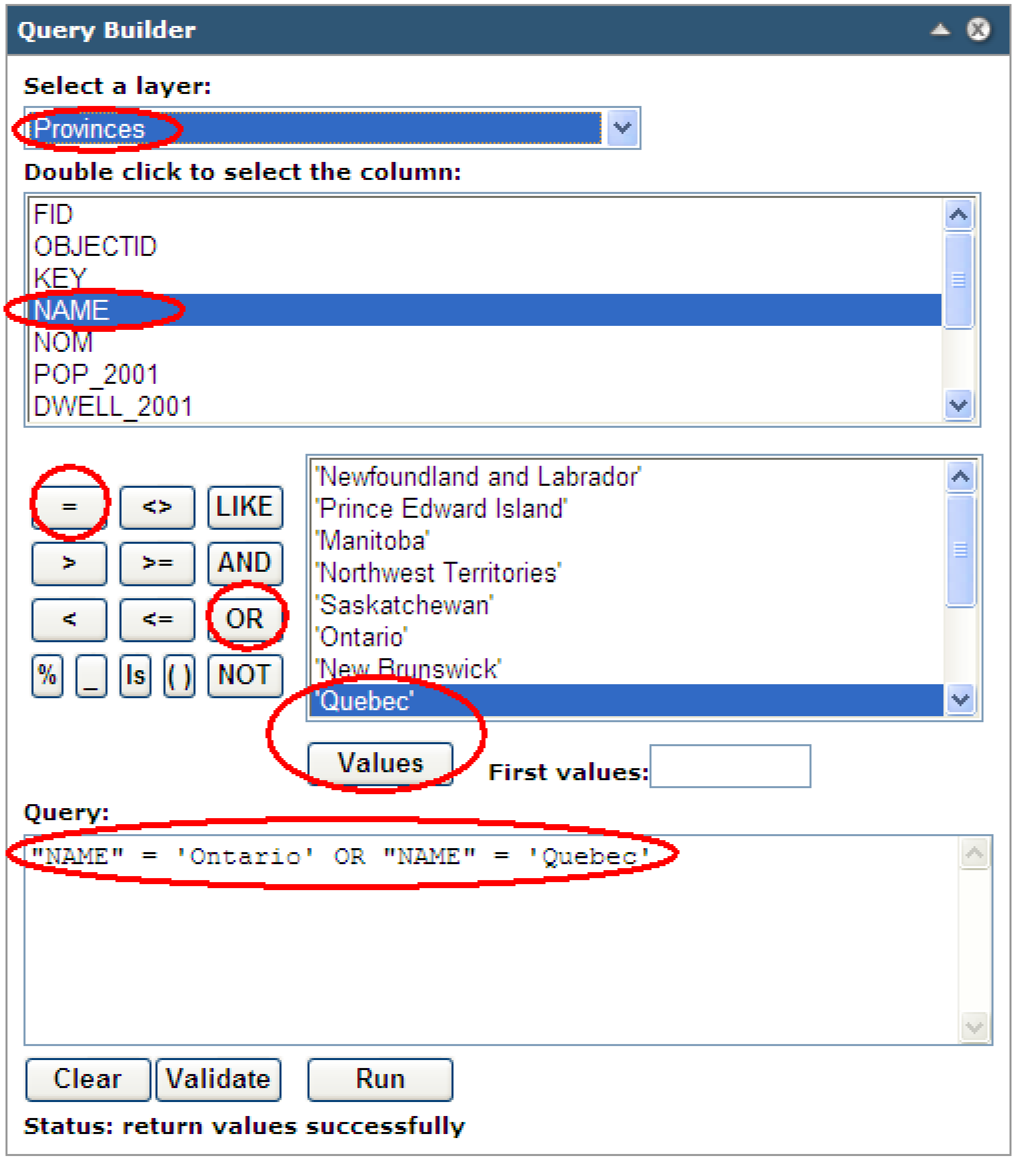
The Query Builder tool lets you select features in a layer by building a query. Below are the steps for using the tool. Note, however, that more specific details on how to develop queries (e.g., querying numbers, combining expressions, using nulls), are provided in the "Build a Query" topic.

1. Within the mapping component, expand the Tasks section located under the Map Layers by clicking the button, and then click **Query Builder**.

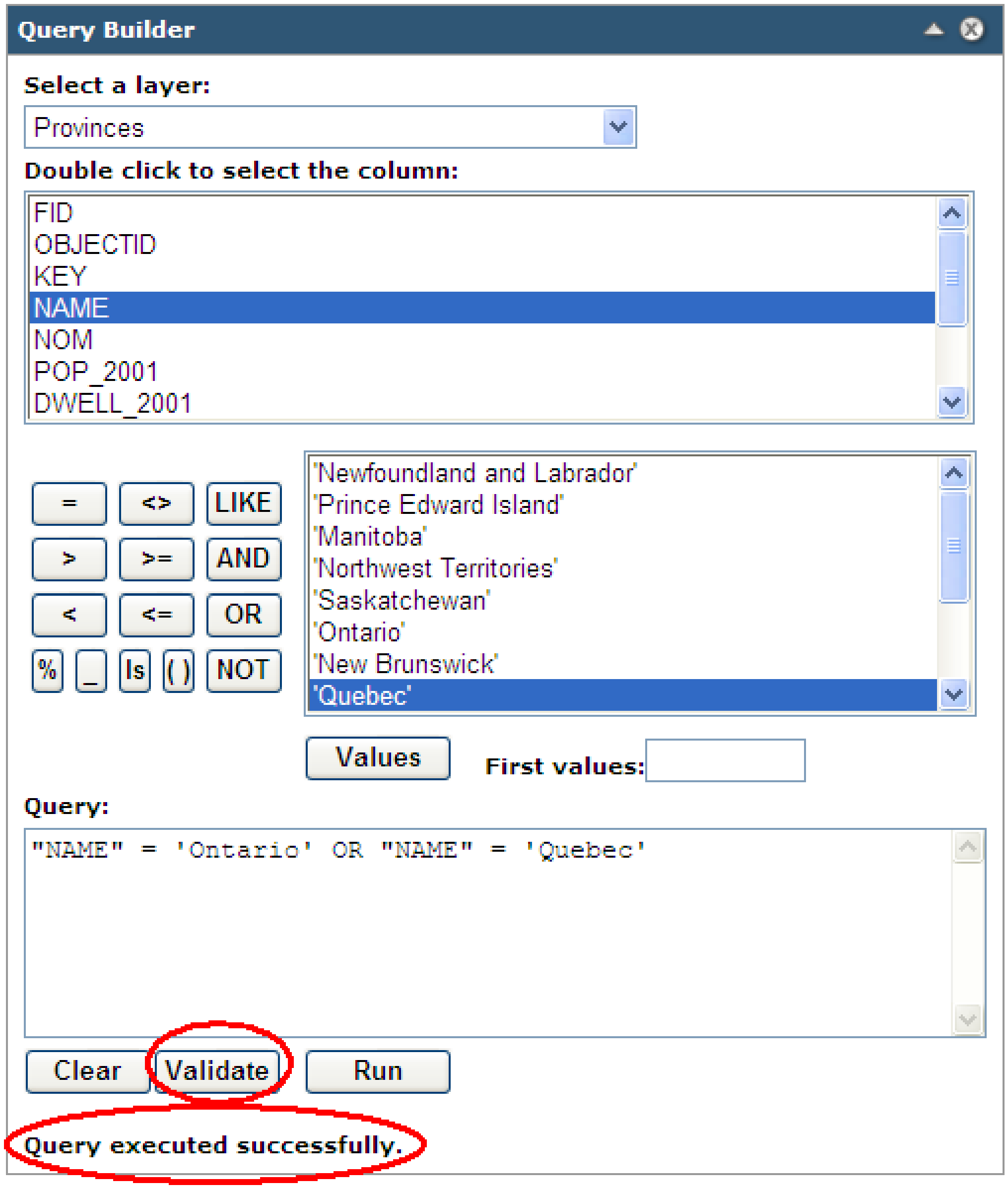


2. To create an expression using the *Query Builder* dialog:
   - Choose the layer to be used from the Select a Layer dropdown, which will cause the columns for that layer to be displayed.
   - Double-click the column you want to use in the query, and then click the **Values** button to display the domain (set of values) for that column.
   - Click an operator, then double-click the value to be used.
   - Alternatively, you can type an expression directly into the query.

   NOTE: To remove any part of the expression, click within the sequence and use either the <**Delete**> or <**Backspace**> keys to remove the desired part(s).

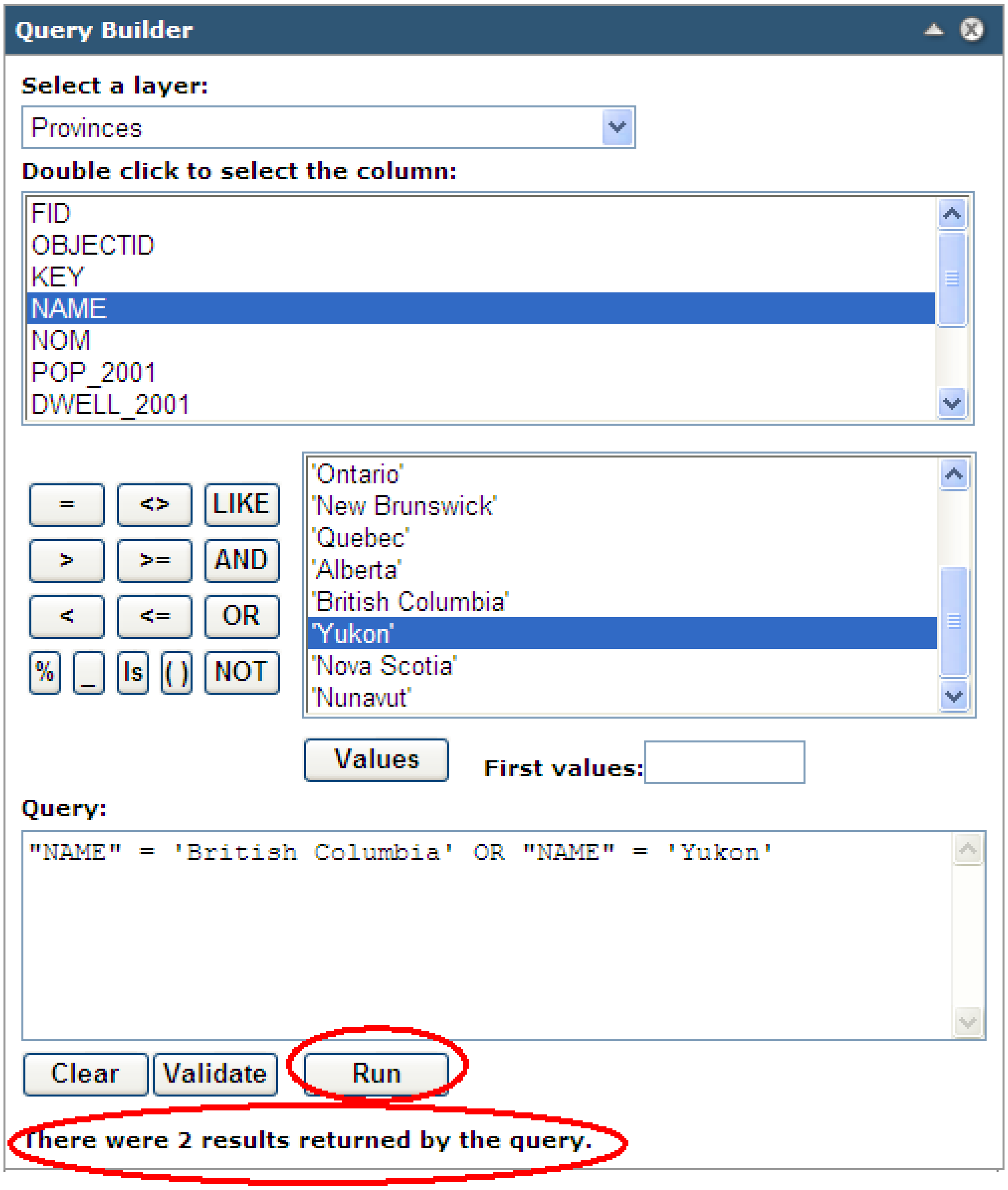


3. OPTIONAL: When the query expression has been built, click **Validate** to insure that the query is valid, that is, it will run without a problem. Once the validation process has completed, a message will be displayed in the lower left corner of the dialog indicating whether the query is valid.



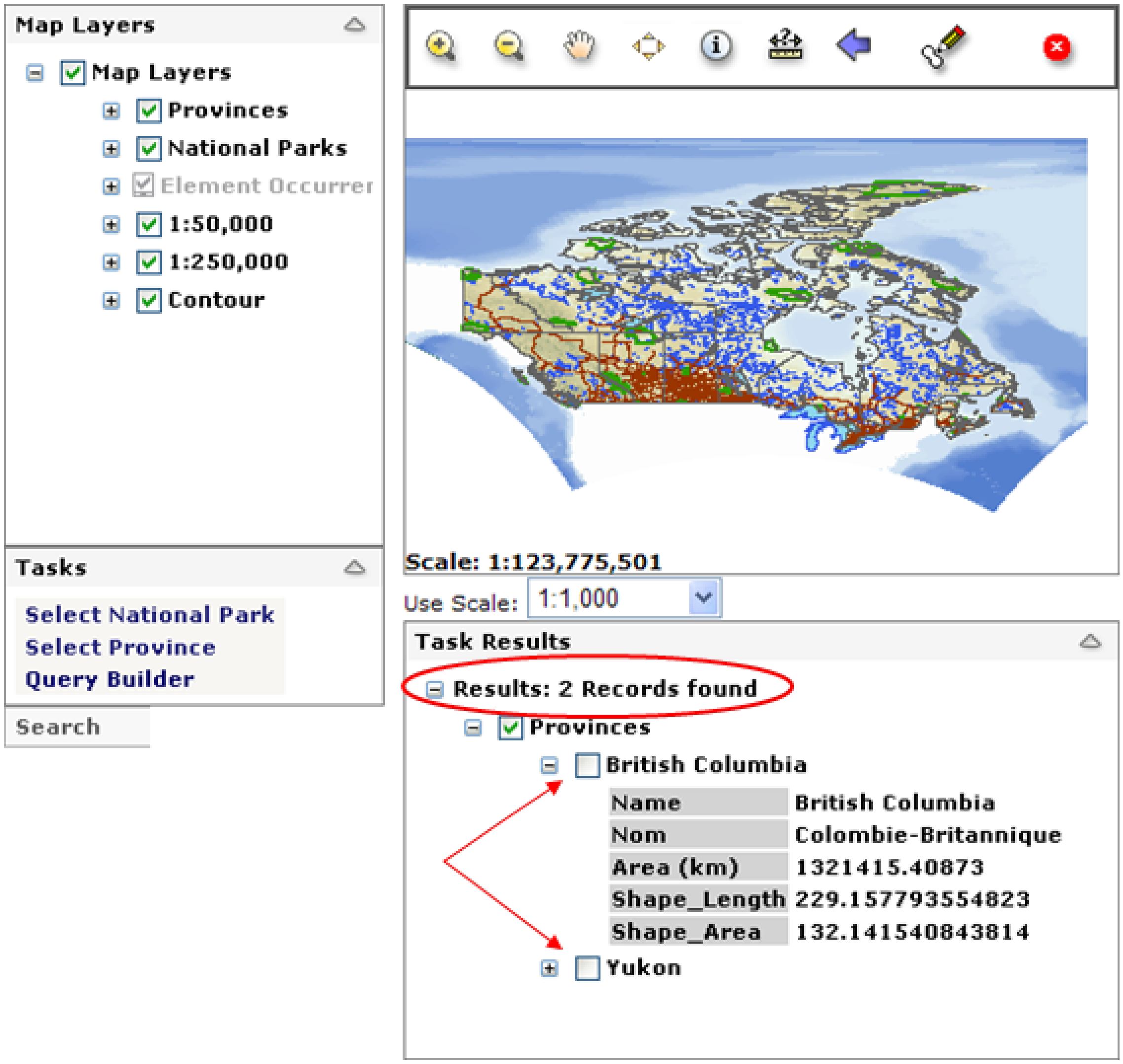
4. Once the query has been successfully validated (optional), click **Run** to generate results for the query.

NOTE: The maximum number of records that can be returned for a query in Kestrel is 500.

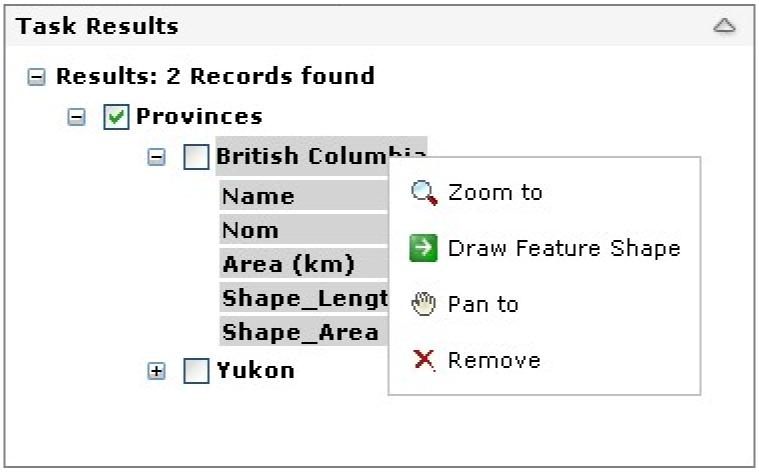


5. Minimize or close the *Query Builder* dialog. (to the top left of the map toolbar).
6. To view the results, expand the Task Results by clicking the button. Results are displayed in a hierarchical tree format with nodes marked by a plus or minus sign.
   - Click the + next to an entry to expand the node and reveal its subordinate units
   - Click the &endash; next to an expanded node to collapse it.

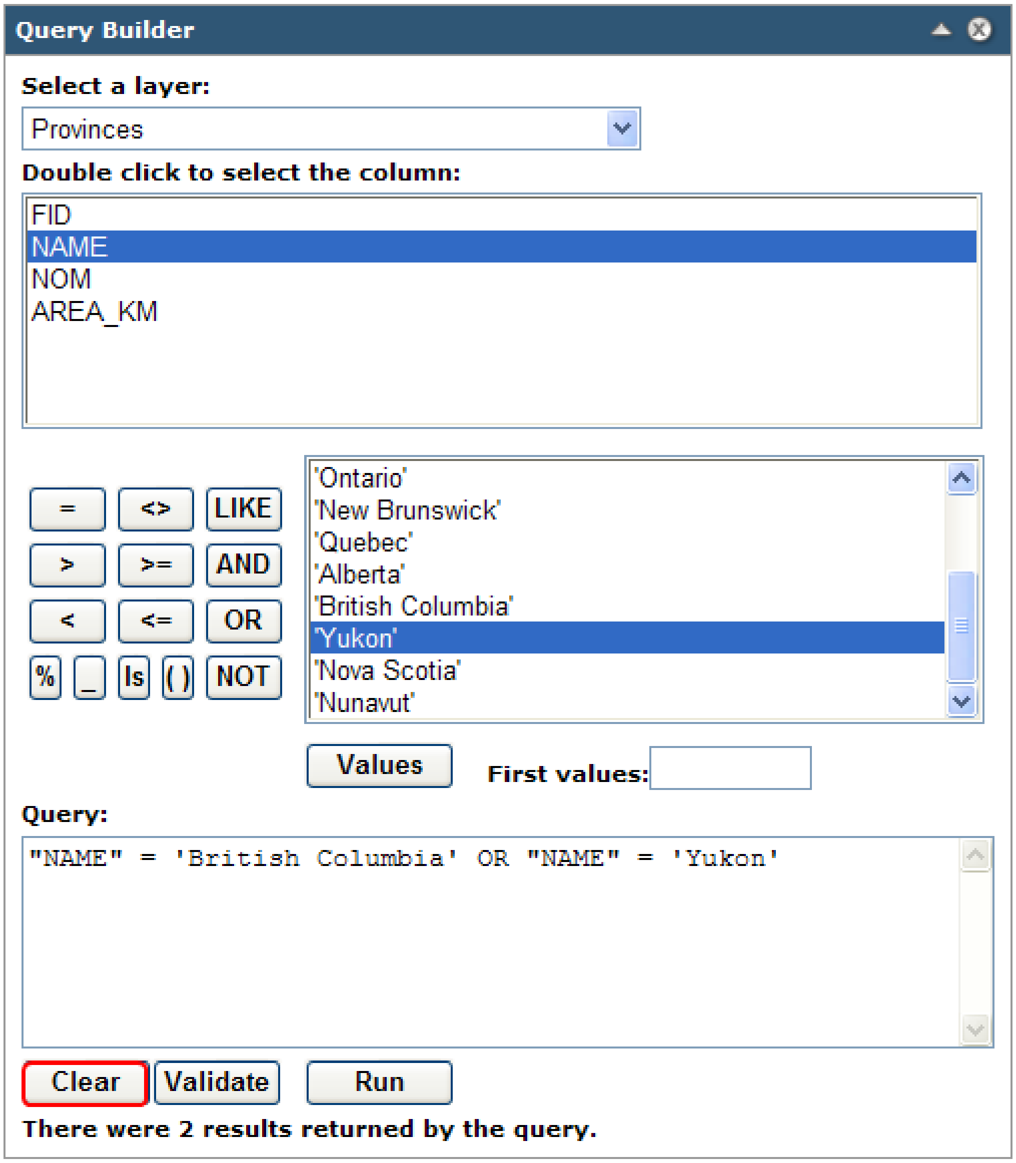
NOTE: In cases where multiple queries have been run and results not deleted following each query, the results of the most recent query are displayed at the top of the list in the Task Results section. The order of the results in the list reflects the sequence in which the queries were run, with the bottom of the list resulting from the first query that was run in the session.



6. Right-click on an entry in the results set to perform the following actions:
    - **Zoom to** the specified location
    - **Draw Feature Shape** allows the user to define the Report Criteria according to the location
    - **Pan to** the specified location
    - **Remove** the specified entry from the Task Results section



NOTE: To clear a previously used query expression, click the **Clear** button within the *Query Builder* dialog.



Related Tasks:

- Build a Query
- Define Report Criteria according to Mapped Location

Build a Query

A query enables you to select different attributes of a layer.

The components of an expression developed using the *Query Builder* dialog include:

- The layer to be used
- An operator
- A value (attribute) of that layer

Alternatively, an expression can also be typed directly into the *Query Builder* dialog.

For example, using the Provinces layer, this query will select all the provinces with populations greater than 100,000:

```
"POP_2001" > 100000
```

When you use this dialog, you are actually creating a **SQL** query. The syntax of the query differs depending on the data source you are querying. The expression is sent to the data source and interpreted there rather than being parsed in the dialog, so expressions are in the native format for the database at which they are aimed.

Column values

The Values list in this dialog automatically lists fields (attributes) with the appropriate delimiters for the type of data you are querying:

- If you are querying data in a file geodatabase, shapefile, dBase table, coverage, INFO table, then field names are enclosed in double quotes:

  ```
  "AREA"
  ```

- If you are querying data in a personal geodatabase then field names are enclosed in square brackets:

  ```
  [AREA]
  ```

- If you are querying data in an ArcSDE geodatabase (i.e., data accessed via a database connection to an ArcSDE Enterprise geodatabase, or data accessed from a database server running ArcSDE Personal Edition or Workgroup Edition) or an ArcIMS image service or feature service, then fields are not enclosed:

  AREA

- If you are querying data in a worksheet in an Excel file (.xls file) or a text file (.txt file), fields are delimited in single quotes.

  ```
  'AREA'
  ```

Strings

Strings must always be enclosed within single quotes. For example:

```
"PC_NAME_EN" = 'Ivvavik National Park of Canada'
```

Strings in expressions are case sensitive, except when you are querying personal geodatabase feature classes and tables. To make a case insensitive search in other data formats, you can use a SQL function to convert all values to the same case. For file-based data sources, use either the UPPER or LOWER function.

For example, the following expression will select managed area names stored as either BIRD ISLANDS SANCTUARY or Bird Islands Sanctuary:

```
UPPER("MANAGED_AR") = 'Bird Islands Sanctuary'
```

Other data sources have similar functions. Personal geodatabases, for example, have functions named UCASE and LCASE that perform the same function.

Use the LIKE operator (instead of the = operator) to build a partial string search. For example, this expression would select both Newfoundland and Labrador, and New Brunswick among the CA province names:

```
"NAME" LIKE 'Ne%'
```

You can use greater than (>), less than (<), greater than or equal (>=), less than or equal (<=) and BETWEEN operators to select string values based on sorting order. For example, this expression will select all the provinces in a coverage with names starting with the letters R to Z:

```
"NAME" >= 'R'
```

The not equal (<>) operator can also be used when querying strings.

Wildcard Characters

A wildcard character is a special symbol that stands for one or more characters.

For any file-based data, '%' means that anything is acceptable in its place: one character, a hundred characters, or no character. Alternatively, if you want to search with a wildcard that represents one character, use '_'.

For example, this expression would select any National Park name starting with the letters Au, such as Aulavik and Auyuittuq:

```
"PC_NAME_EN" LIKE 'Au%'
```

But this expression would find Catherine Smith and Katherine Smith:

```
"OWNER_NAME" LIKE '_atherine smith'
```

The wildcards you use to query personal geodatabases are '*' for any number of characters and '?' for one character.

Wildcard characters appear as buttons on the query dialog. You can click the button to enter the wildcard into the expression you’re building. Only the wildcard characters that are appropriate to the data source of the layer or table you are querying are displayed.

If you use a wildcard character in a string with the = operator, the character is treated as part of the string, not as a wildcard.

With a joined table, use wildcards appropriate for the side of the join that you are querying. If the query only applies to fields in the target table (the left-side table), use the target table wildcards. If the query only applies to fields in the join table (the right-side table), use the join table wildcards. If the query involves fields from both sides of the join, use the '%' and '_' wildcards.

For example, if you join a dbf file (the join table) to a personal GDB feature class (the target table):

1) Use * for queries that only involve personal GDB fields.

2) Use % for queries that only involve dbf columns.

3) Use % for queries involving columns from both sides of the table.

Null values

Null values are supported in fields for geodatabases and for date fields in shapefiles/dBASE tables and coverages/INFO tables. If you select a column (attribute) of a type that supports null values, and if that column contains any null values in the records displayed in the Values list, you'll see ' ' as the second entry from the top of the list. You can double-click this value to add it into your expression and, using the = operator, can query the column to select all Element Occurrence records with a null value for ELCODE:

```
"ELCODE" = ' '
```

To select all occurrences that have ELCODE values, that is, where the ELCODE attribute is not null, use the <> (not equal) operator:

```
"ELCODE" <> ' '
```

Querying numbers

You can query numbers using the equal (=), not equal (<>), greater than (>), less than (<), greater than or equal (>=), and less than or equal (<=) operators.

```
"POP_2001" > 100000
```

The point is always used as the decimal delimiter regardless of your regional settings. The comma cannot be used as a decimal or thousands delimiter in a query.

Calculations

Calculations can be included in queries using these arithmetic operators: `+ - * /`

Calculations can be between fields and numbers.

For example:

```
"SHAPE_AREA" >= "SHAPE_LEN" * 100
```

Calculations can also be performed between fields.

For example, to find the provinces with a population density of less than or equal to 25 people per square kilometer, you could use this expression:

```
"POP_2001" / "AREA_KM" <= 25
```

Operator precedence

Expressions are evaluated according to standard operator precedence rules. For example, the part of an expression enclosed in parentheses is evaluated before the part that is not enclosed.

This example:

```
HOUSEHOLDS > MALES * POP90_SQMI + AREA
```

is evaluated differently, and thus produces different results, than:

```
HOUSEHOLDS > MALES * (POP90_SQMI + AREA)
```

You can either click to add parentheses and then enter the expression you want to enclose, or highlight the existing expression that you want to enclose and then press the Parentheses button to enclose it.

Combining expressions

Expressions can be combined together with the AND and OR operators. When you use the AND operator, both of the expressions separated by the AND operator must be true for the record to be selected.

```
"AREA_KM" > 100000 AND "DWELL_2001" < 50000
```

When you use the OR operator, at least one expression of the two expressions separated by the OR operator must be true for the record to be selected.

```
"AREA_KM" > 100000 OR "POP_2001" > 750000
```

Use the NOT operator at the beginning of an expression to find features or records that don't match the specified expression. NOT expressions can be combined with AND and OR.

```
"AREA_KM" > 100000 AND NOT "POP_2001" < 750000
```

Querying dates

The syntax required for querying dates depends on the data type. The proper syntax will be automatically set for you in the expression when you double-click a date in the Values list in the *Query Builder* dialog.

People

Introduction to People

A person is an observer and/or user. To have access to the Kestrel web application, one must be a user. A person record has to be created before a user record. Person attributes include contact information, such as address and phone number, whereas roles and passwords are defined within user attributes.

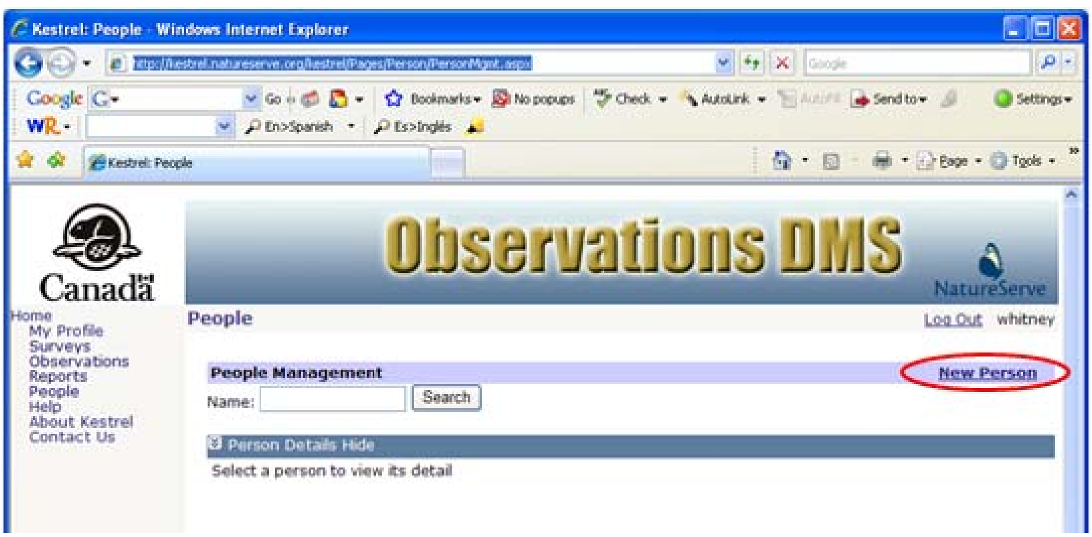
Tasks:

- Find Person
- Create New Person
- View Person
- Edit Person
- Delete Person
- Create User Account
- Edit User Account
- Delete User Account

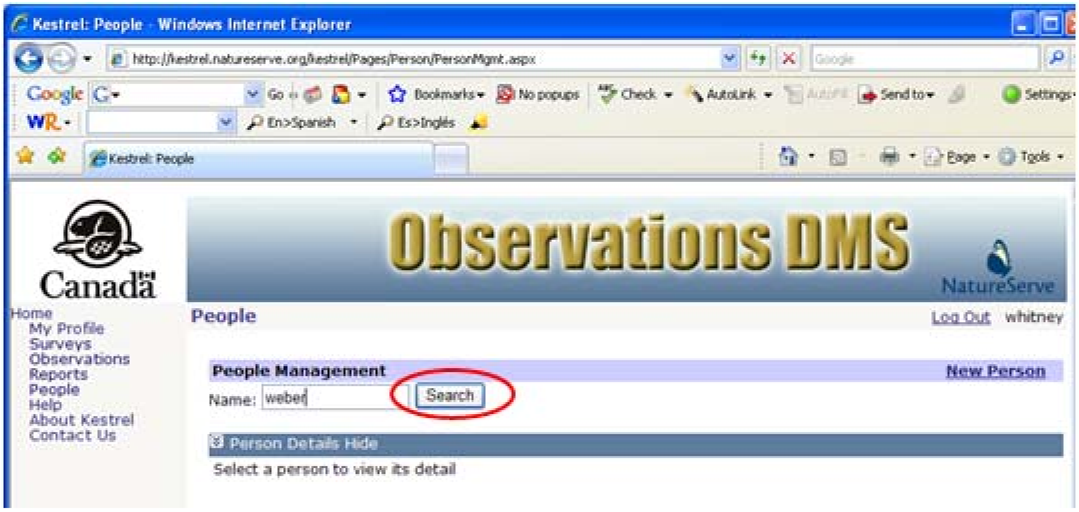
Methods of Navigation:

There are a number of ways to navigate through the *People* page:

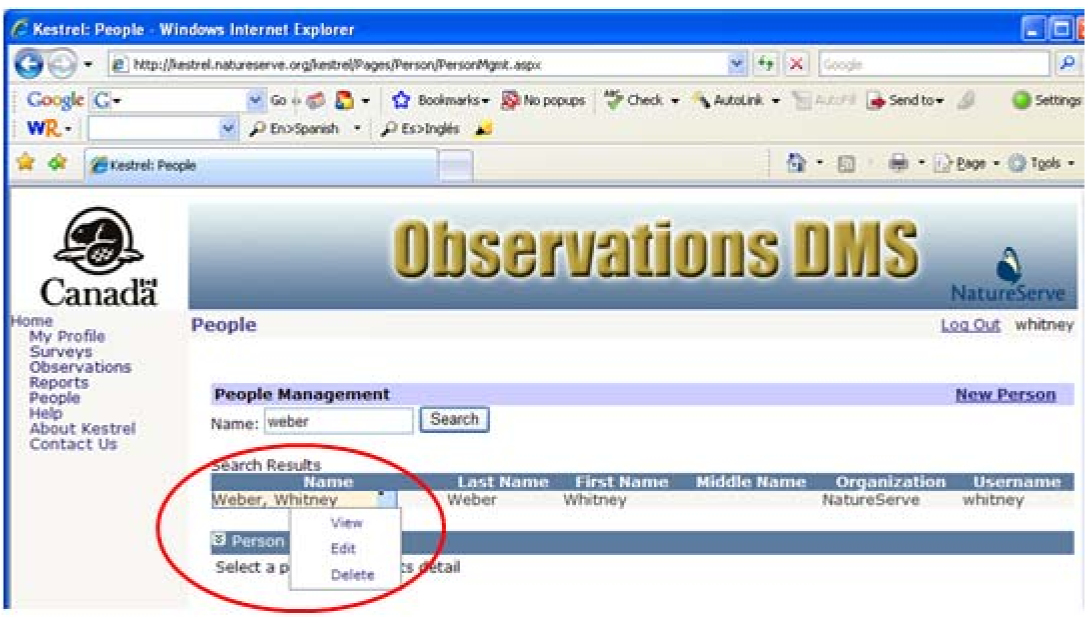
- Create a new person by clicking on the **New Person** button.



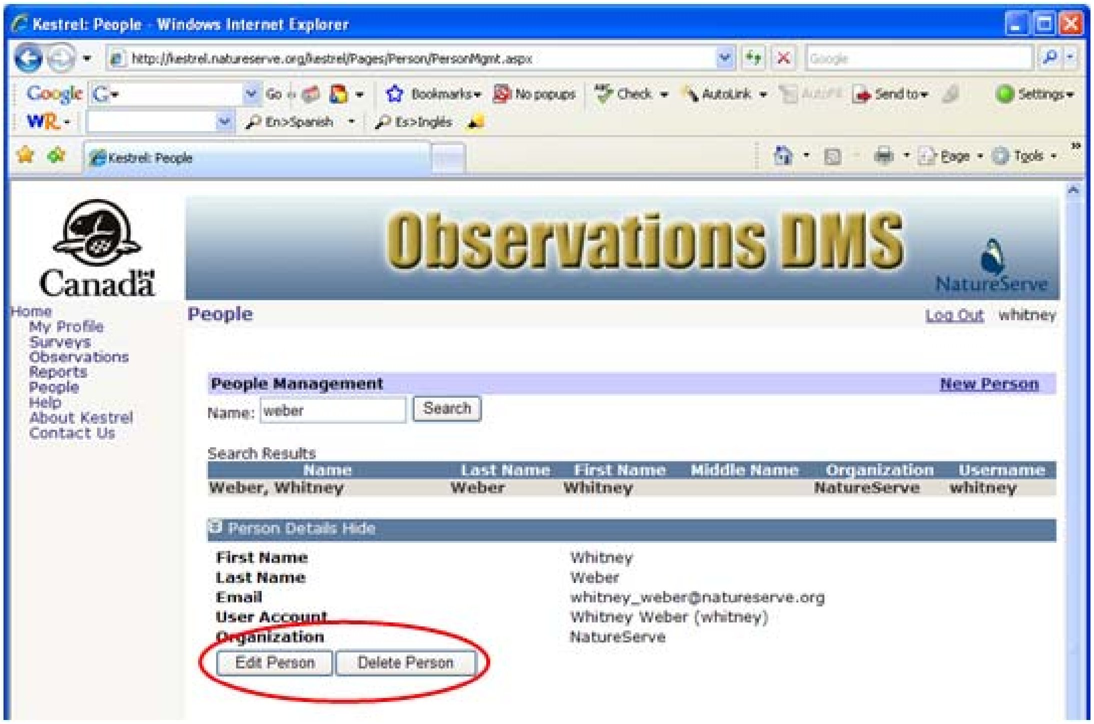
- Find a person by entering their first or last name within the Name field and click **Search**.



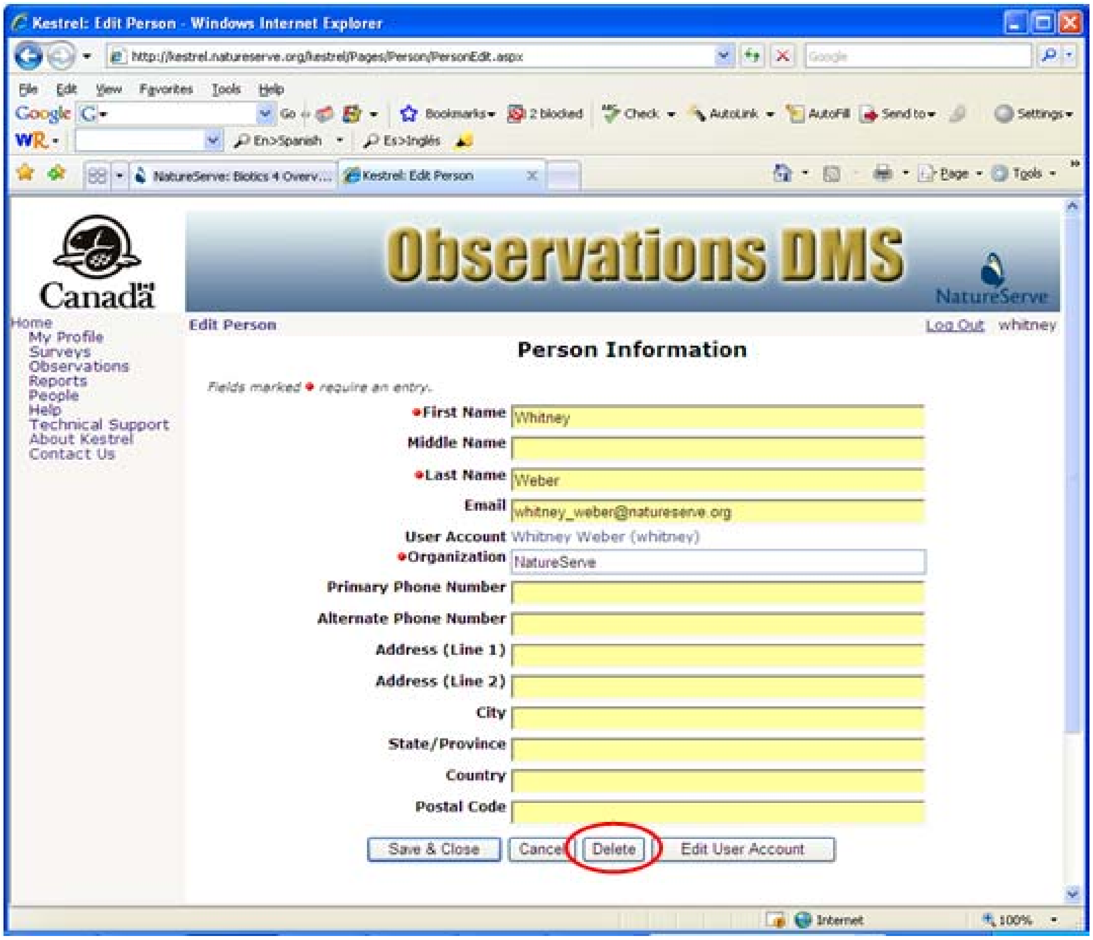
- Click on a person within the Search Results section and choose to **View**, **Edit**, or **Delete** the survey, or **Manage Observations**.



- Alternatively, **View** the person, from which point you can **Edit** or **Delete** the person.



- The person can also be **Delete**d from within the *Edit Person* page.


Kestrel: Edit Person - Windows Internet Explorer
http://kestrel.natureserve.org/kestrel/Pages/Person/PersonEdit.aspx
Observations DMS
NatureServe
Canada
Home
My Profile
Surveys
Observations
Reports
People
Help
Technical Support
About Kestrel
Contact Us
Edit Person
Log Out whitney
Person Information
Fields marked • require an entry.
•First Name Whitney
Middle Name
•Last Name Weber
Email whitney_weber@natureserve.org
User Account Whitney Weber (whitney)
•Organization NatureServe
Primary Phone Number
Alternate Phone Number
Address (Line 1)
Address (Line 2)
City
State/Province
Country
Postal Code
Save & Close
Cancel
Delete
Edit User Account

People Attributes

The following fields are attributes of a person:

- First Name
- Middle Name
- Last Name
- Email
- User Account
- Organization
- Primary Phone Number
- Alternate Phone Number
- Address (Line 1)
- Address (Line 2)
- City
- State/Province
- Country
- Postal Code

First Name

First Name of the person.

In the case that a User Account is created, the data in this field will be used to populate the corresponding User field. If the field is not populated on the *Edit Person* page prior to creating a User Account, once changes are saved to the User Account (within the *Edit User Account* page), the corresponding field will be populated on the *Edit Person* page.

Page: Edit Person
Field: First Name
    Database Table: PERSON
        Column: firstname_s
        AttributeDefinition_ID:
        Data Type: VARCHAR2(4000)
        Optionality: NOT NULL
        Default Value:
        Column linking to Parent Table:
    Foreign Key from:
        Column Name:
        Display Column:

Middle Name

Middle Name of the person.

Page: Edit Person
Field: Middle Name
    Database Table: PERSON
        Column: middlename_s
        AttributeDefinition_ID:
        Data Type: VARCHAR2(4000)
        Optionality: NULL
        Default Value:
        Column linking to Parent Table:
    Foreign Key from:
        Column Name:
        Display Column:

Last Name

Last Name of the person.

In the case that a User Account is created, the data in this field will be used to populate the corresponding User field. If the field is not populated on the *Edit Person* page prior to creating a User Account, once changes are saved to the User Account (within the *Edit User Account* page), the corresponding field will be populated on the *Edit Person* page.

Page: Edit Person
Field: Last Name
    Database Table: PERSON
        Column: lastname_s
        AttributeDefinition_ID:
        Data Type: VARCHAR2(4000)
        Optionality: NOT NULL
        Default Value:
        Column linking to Parent Table:
    Foreign Key from:
        Column Name:
        Display Column:

Email

Email address of the person.

In the case that a User Account is created, the data in this field will be used to populate the corresponding User field. If the field is not populated on the *Edit Person* page prior to creating a User Account, once changes are saved to the User Account (within the *Edit User Account* page), the corresponding field will be populated on the *Edit Person* page.

Page: Edit Person
Field: Email
Database Table: PERSON
Column: email_s
AttributeDefinition_ID:
Data Type: VARCHAR2(4000)
Optionality: NULL
Default Value:
Column linking to Parent Table:
Foreign Key from:
Column Name:
Display Column:

User Account

User login name.

In the case that a User Account is created, the data in this field will be automatically populated from the corresponding User field within the *Edit User Account* page.

Page: Edit Person
Field: User Account
Database Table: PERSON
Column: useraccount_user_x
AttributeDefinition_ID:
Data Type: VARCHAR2(4000)
Optionality: NULL
Default Value:
Column linking to Parent Table: user_id
Foreign Key from: VK_USER *(if a local user; not recorded within database if Active Directory user)*
Column Name: user_id
Display Column:

Organization

Organization with which the person is affiliated.

Page: Edit Person
Field: Organization
    Database Table: PERSON
        Column: organization_s
        AttributeDefinition_ID:
        Data Type: VARCHAR2(4000)
        Optionality: NOT NULL
        Default Value:
        Column linking to Parent Table:
    Foreign Key from:
        Column Name:
        Display Column:

Primary Phone Number

Primary telephone number(s), including area code, for a person.

Data entry details:

Phone number(s) should be entered in the format 999-999-9999.

Page: Edit Person
Field: Primary Phone Number
Database Table: PERSON_EXT
Column: string_val
AttributeDefinition_ID: 366
Data Type: VARCHAR2(4000)
Optionality: NULL
Default Value:
Column linking to Parent Table: person_id
Foreign Key from: PERSON
Column Name: person_id
Display Column:

Alternate Phone Number

Alternate phone number(s), including area code, for a person.

Data entry details:

Phone number(s) should be entered in the format 999-999-9999.

Page: Edit Person
Field: Alternate Phone Number
- *Database Table:* PERSON_EXT
  - *Column:* string_val
  - *AttributeDefinition_ID:* 367
  - *Data Type:* VARCHAR2(4000)
  - *Optionality:* NULL
  - *Default Value:*
  - *Column linking to Parent Table:* person_id
- *Foreign Key from:* PERSON
  - *Column Name:* person_id
  - *Display Column:*

Address (Line 1)

First line of the mailing address for the person as it would appear on a standard mailing label.

Page: Edit Person
Field: Address (Line 1)
  Database Table: PERSON_EXT
    Column: string_val
    AttributeDefinition_ID: 369
    Data Type: VARCHAR2(4000)
    Optionality: NULL
    Default Value:
    Column linking to Parent Table: person_id
  Foreign Key from: PERSON
    Column Name: person_id
    Display Column:

Address (Line 2)

Second line of the mailing address for the person as it would appear on a standard mailing label.

Page: Edit Person
Field: Address (Line 2)
    Database Table: PERSON_EXT
        Column: string_val
        AttributeDefinition_ID: 370
        Data Type: VARCHAR2(4000)
        Optionality: NULL
        Default Value:
        Column linking to Parent Table: person_id
    Foreign Key from: PERSON
        Column Name: person_id
        Display Column:

City

City in which the person is located.

Page: Edit Person
Field: City
    Database Table: PERSON_EXT
        Column: string_val
        AttributeDefinition_ID: 371
        Data Type: VARCHAR2(4000)
        Optionality: NULL
        Default Value:
        Column linking to Parent Table: person_id
    Foreign Key from: PERSON
        Column Name: person_id
        Display Column:

State/Province

State or province where the person is located.

Page: Edit Person
Field: State/Province
    Database Table: PERSON_EXT
        Column: string_val
        AttributeDefinition_ID: 372
        Data Type: VARCHAR2(4000)
        Optionality: NULL
        Default Value:
        Column linking to Parent Table: person_id
    Foreign Key from: PERSON
        Column Name: person_id
        Display Column:

Country

Name of the nation where the person is located.

Page: Edit Person
Field: Country
    Database Table: PERSON_EXT
        Column: string_val
        AttributeDefinition_ID: 373
        Data Type: VARCHAR2(4000)
        Optionality: NULL
        Default Value:
        Column linking to Parent Table: person_id
    Foreign Key from: PERSON
        Column Name: person_id
        Display Column:

Postal Code

Postal code (i.e., ZIP code in the United States) for a person.

Page: Edit Person
Field: Postal Code
  Database Table: PERSON_EXT
    Column: string_val
    AttributeDefinition_ID: 374
    Data Type: VARCHAR2(4000)
    Optionality: NULL
    Default Value:
    Column linking to Parent Table: person_id
  Foreign Key from: PERSON
    Column Name: person_id
    Display Column:

User Attributes

The following fields are attributes of a user:

- Username
- First Name
- Last Name
- Email Address
- Active
- Roles
- Password

Username

User login name.

Page: Edit User Account
Field: Username
    Database Table: K_USER
        Column: username
        AttributeDefinition_ID:
        Data Type: VARCHAR2(255)
        Optionality: NOT NULL
        Default Value:
        Column linking to Parent Table: user_id
    Foreign Key from: PERSON
        Column Name: useraccount_user_x
        Display Column:

First Name

First Name of the user.

This field is populated from the data contained in the *Edit Person* page. If the field was not previously populated on the *Edit Person* page, it will be once changes are saved to the User Account.

Page: Edit User Account
Field: First Name
    Database Table: K_USER
        Column: firstname
        AttributeDefinition_ID:
        Data Type: VARCHAR2(255)
        Optionality: NOT NULL
        Default Value:
        Column linking to Parent Table: user_id
    Foreign Key from: PERSON
        Column Name: useraccount_user_x
        Display Column:

Last Name

Last Name of the user.

This field is populated from the data contained in the *Edit Person* page. If the field was not previously populated on the *Edit Person* page, it will be once changes are saved to the User Account.

Page: Edit User Account
Field: Last Name
    Database Table: K_USER
        Column: lastname
        AttributeDefinition_ID:
        Data Type: VARCHAR2(255)
        Optionality: NOT NULL
        Default Value:
        Column linking to Parent Table: user_id
    Foreign Key from: PERSON
        Column Name: useraccount_user_x
        Display Column:

Email Address

Email address of the user.

This field is populated from the data contained in the *Edit Person* page. If the field was not previously populated on the *Edit Person* page, it will be once changes are saved to the User Account.

Page: Edit User Account
Field: Email Address
    Database Table: K_USER
        Column: email
        AttributeDefinition_ID:
        Data Type: VARCHAR2(255)
        Optionality: NOT NULL
        Default Value:
        Column linking to Parent Table: user_id
    Foreign Key from: PERSON
        Column Name: useraccount_user_x
        Display Column:

Active

Indicates whether the person is an active user.

The default is that the user is Active. To inactivate a user, uncheck the checkbox.

Page: Edit User Account
Field: Active
  Database Table: K_USER
    Column: active
    AttributeDefinition_ID:
    Data Type: CHAR(1)
    Optionality: NOT NULL
    Default Value:
    Column linking to Parent Table:
  Foreign Key from:
    Column Name:
    Display Column:

Roles

Permissions granted to the user.

Pick list indicating the privileges the user is granted within the Kestrel application.

- Administrator
    - authority to create Surveys and Observations; authority to edit and delete a particular survey is defined within the survey according to the Roles for Selected User;
    - authority to create, edit, and delete Person and User Account records;
    - authority to create and edit named locations;
- Contributor
    - authority to create Surveys and Observations; authority to edit and delete a particular survey is defined within the survey according to the Roles for Selected User;
    - authority to create, edit, and delete Person records;
    - authority to create and edit named locations;
- User
    - authority to view records;
    - authority to create Person records;
    - authority to create named locations.

Page: Edit User Account
Field: Roles
    Database Table: USER_ROLES
        Column: role
        AttributeDefinition_ID:
        Data Type: VARCHAR2(255)
        Optionality: NOT NULL
        Default Value:
        Column linking to Parent Table:
    Foreign Key from:
        Column Name:
        Display Column:

Password

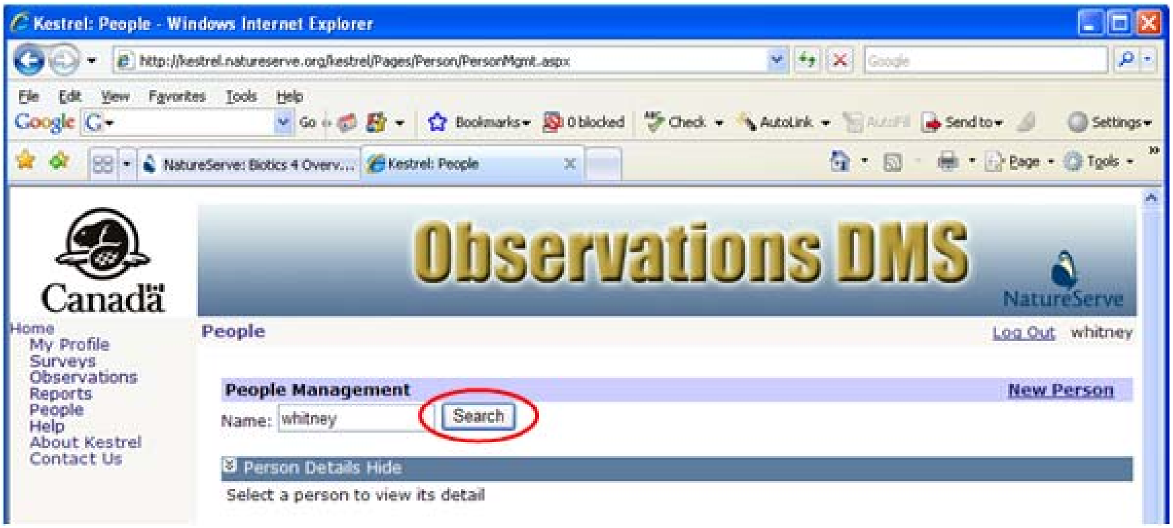
Password defined for individual user which permits access to the Kestrel web application.

Page: Edit User Account
Field: Password
    Database Table: K_USER
        Column: password
        AttributeDefinition_ID:
        Data Type: VARCHAR2(255)
        Optionality: NOT NULL
        Default Value:
        Column linking to Parent Table: user_id
    Foreign Key from: PERSON
        Column Name: useraccount_user_x
        Display Column:

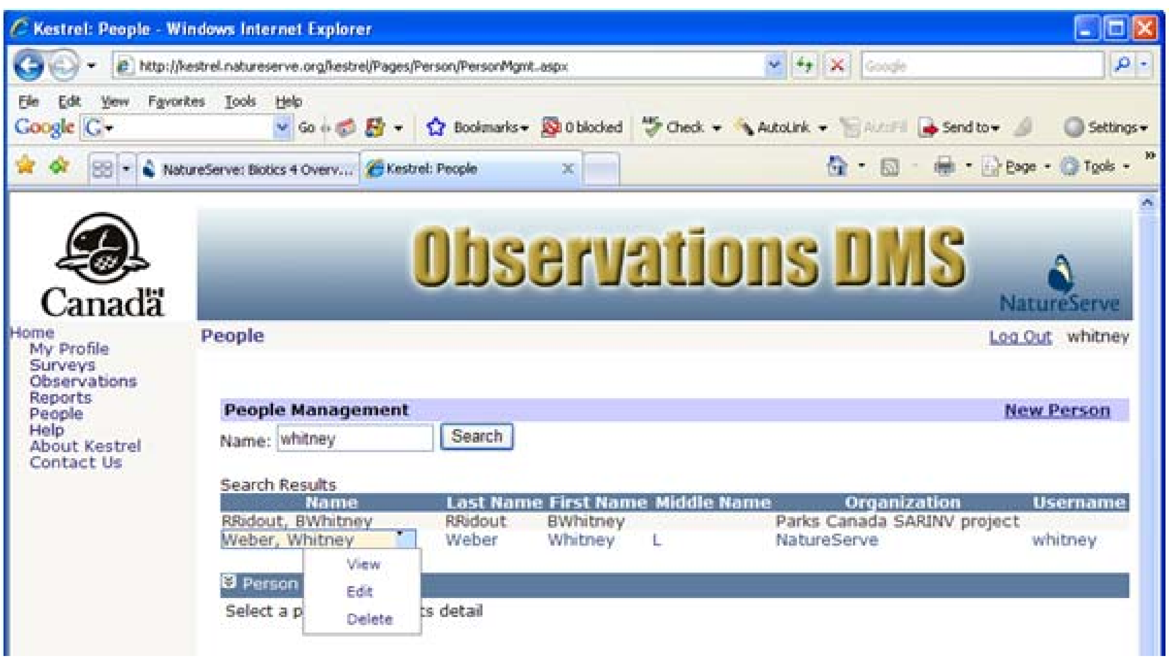
Tasks

Find Person

1. Within the *People* page, search for the person, by first or last name, whose record you wish to edit and choose **Search**.



2. Click on the person record, from which you can choose to **View**, **Edit**, or **Delete** the person record.



Related Tasks:

- View Person
- Edit Person
- Delete Person

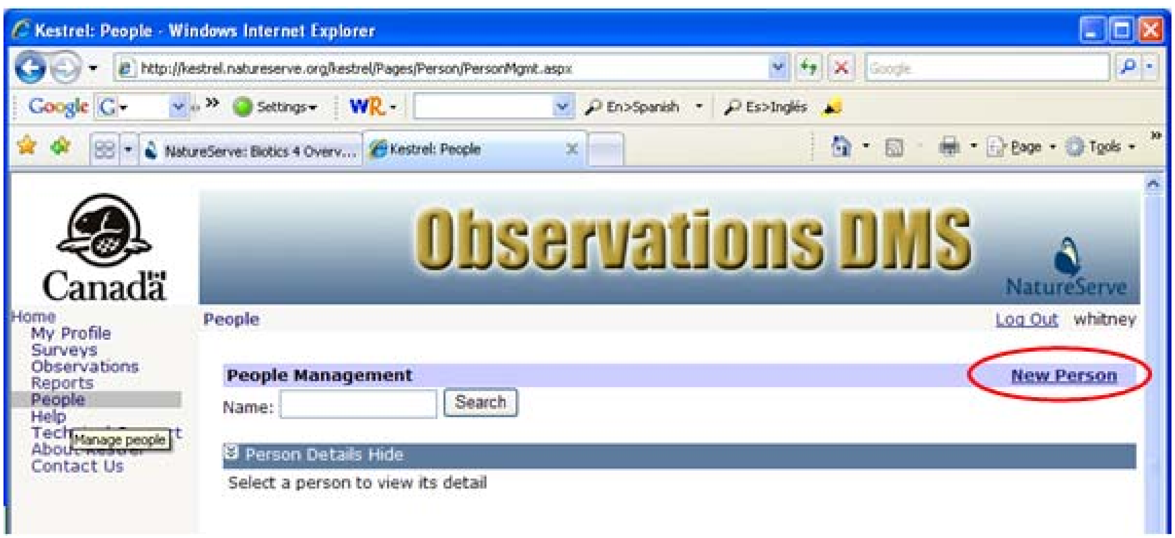
Create New Person

A person record can be created from a number of pages, including:

- *People* page
- *Select a Person* page, as reached by browsing from the Survey Owner field within the *Edit Survey* page, or from the Primary Observer field within the *Edit Observations* page
- *Select Persons* page, as reached by adding values when creating or editing a person-type list (see the Select Persons task in the Lists section for more details)

NOTE: Creation of a person record alone does not give that individual access to the Kestrel website. In order to grant a person access to Kestrel, one must Create User Account. In order to create a user account for a person, the user logged in must have the role of an Administrator. Roles are defined in the Create User Account page.

1. Within the *People* page, click **New Person**.



- OR -

Alternatively, within the *Select a Person* page, choose **New Person**.

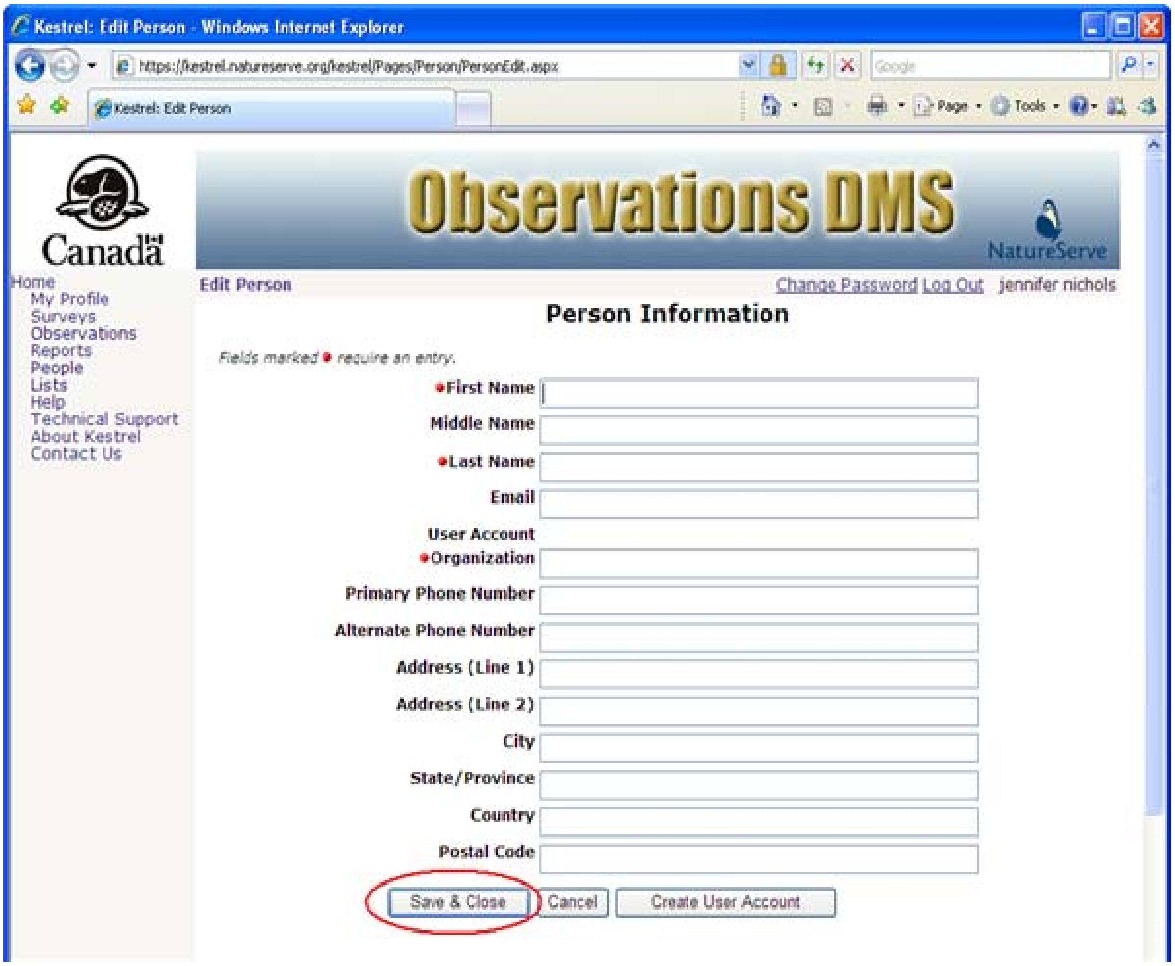
- OR -

Alternatively, within the *Select Persons* page, choose **New Person**.

2. Within the *Edit Person* page, fill out the various fields as appropriate. For further information on any of the fields, click the appropriate link below.
    - First Name - Required
    - Middle Name
    - Last Name - Required
    - Email
    - User Account - Read Only
    - Organization - Required
    - Primary Phone Number
    - Alternate Phone Number
    - Address (Line 1)
    - Address (Line 2)
    - City

- State/Province
- Country
- Postal Code

3. **Save & Close** the person record.

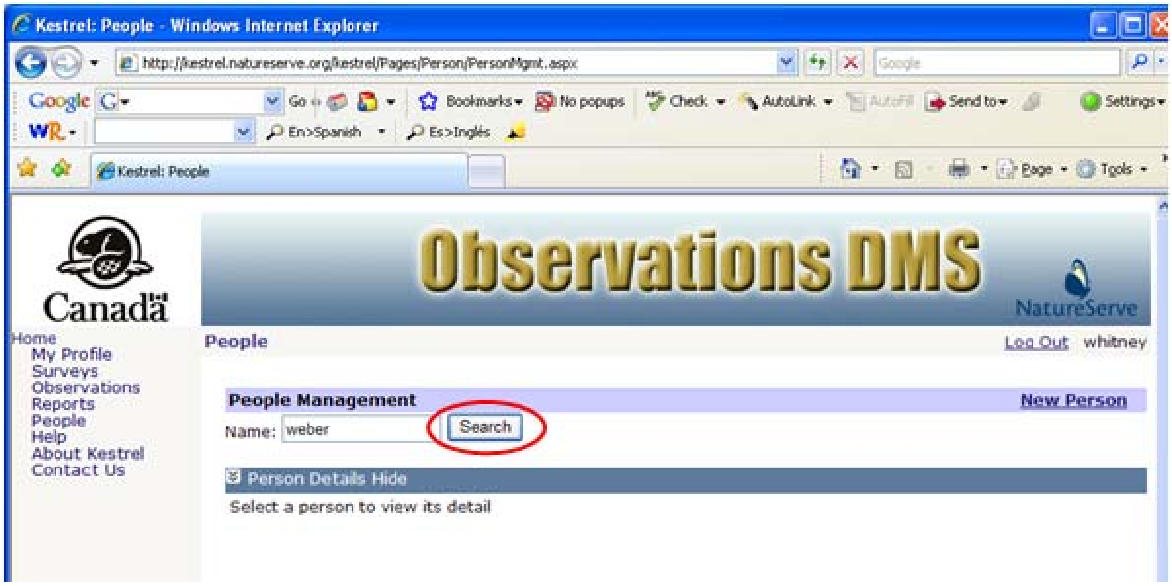


Related Tasks:

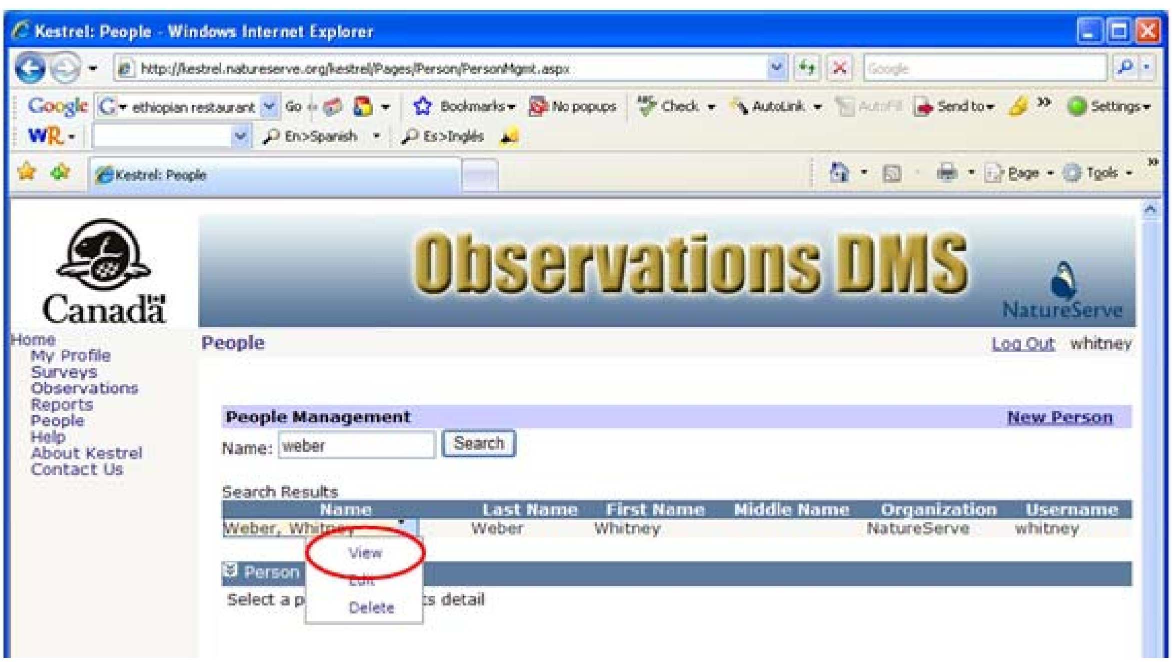
- Create User Account
- Edit Person

View Person

1. Within the *People* page, search for the person, by first or last name, whose record you wish to view and choose **Search**.



2. Click on the person's name and select **View** from the dropdown list.



Related Tasks:

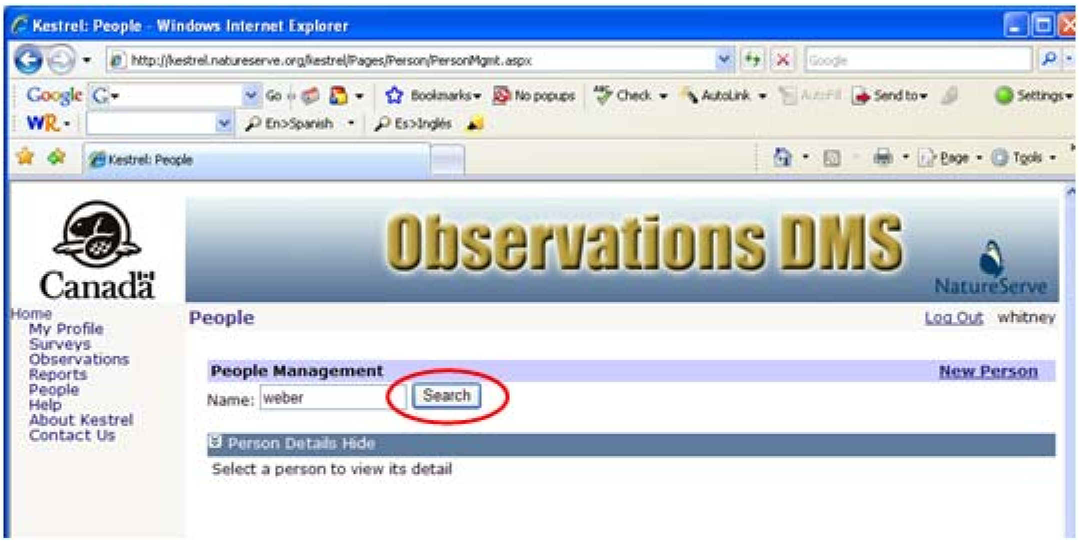
- Edit Person

- Delete Person

Edit Person

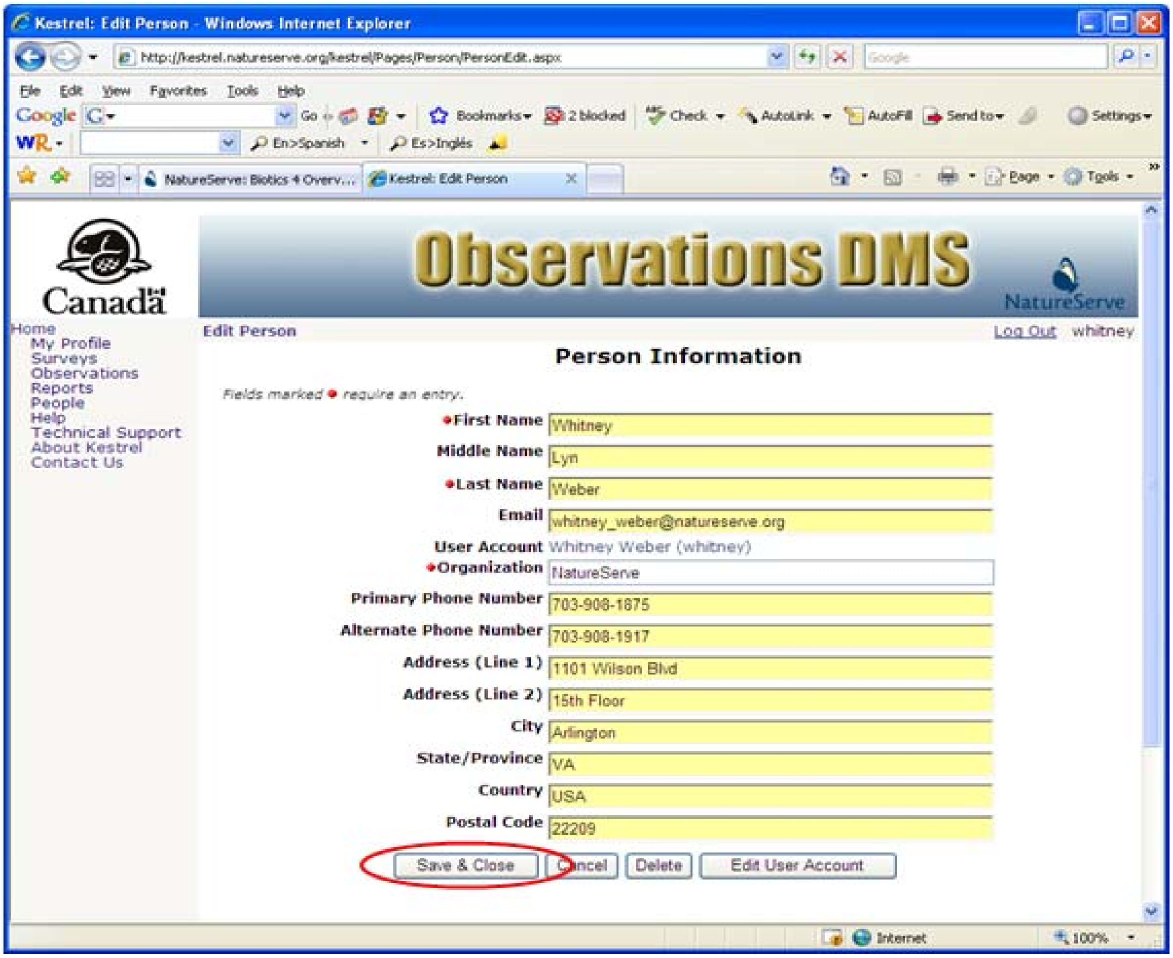
Note: Existence of a person record alone does not give an individual access to the Kestrel website. A previously created Person may be edited in order to grant that person access to Kestrel as a User, by selecting the Create User Account button.

1. Within the *People* page, search for the person, by first or last name, whose record you wish to edit and choose **Search**.



2. Within the *Edit Person* page, fill out the various fields as appropriate. For further information on any of the fields, click the appropriate link below.
   - First Name - Required
   - Middle Name
   - Last Name - Required
   - Email
   - User Account - Read Only
   - Organization - Required
   - Primary Phone Number
   - Alternate Phone Number
   - Address (Line 1)
   - Address (Line 2)
   - City
   - State/Province
   - Country
   - Postal Code

3. **Save & Close** the person record.



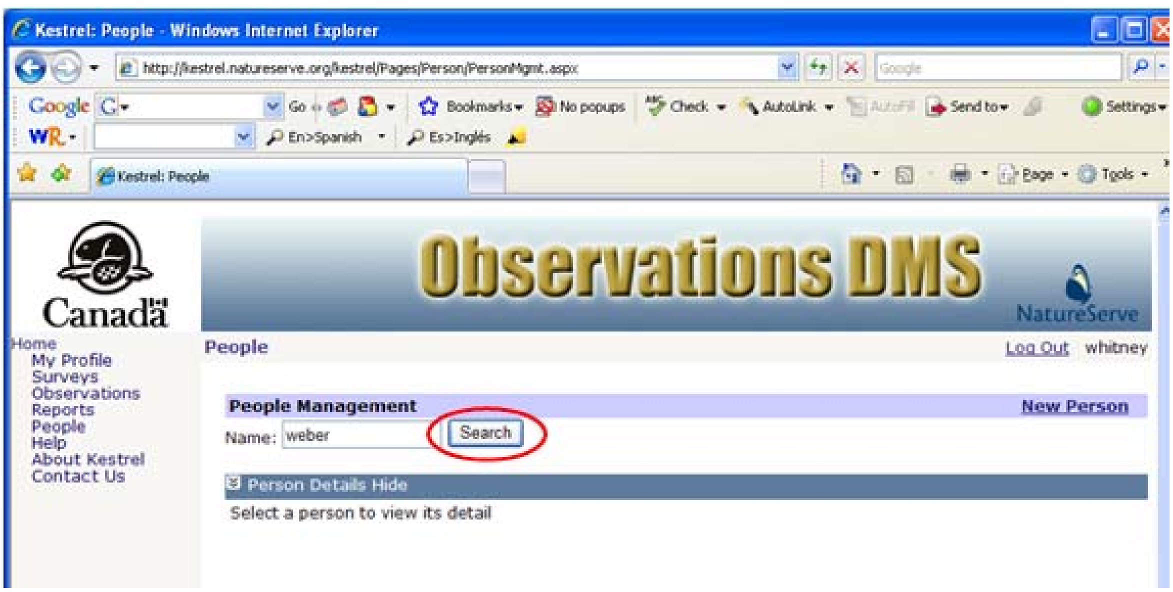
Related Tasks:

- Edit User Account
- Create New Person

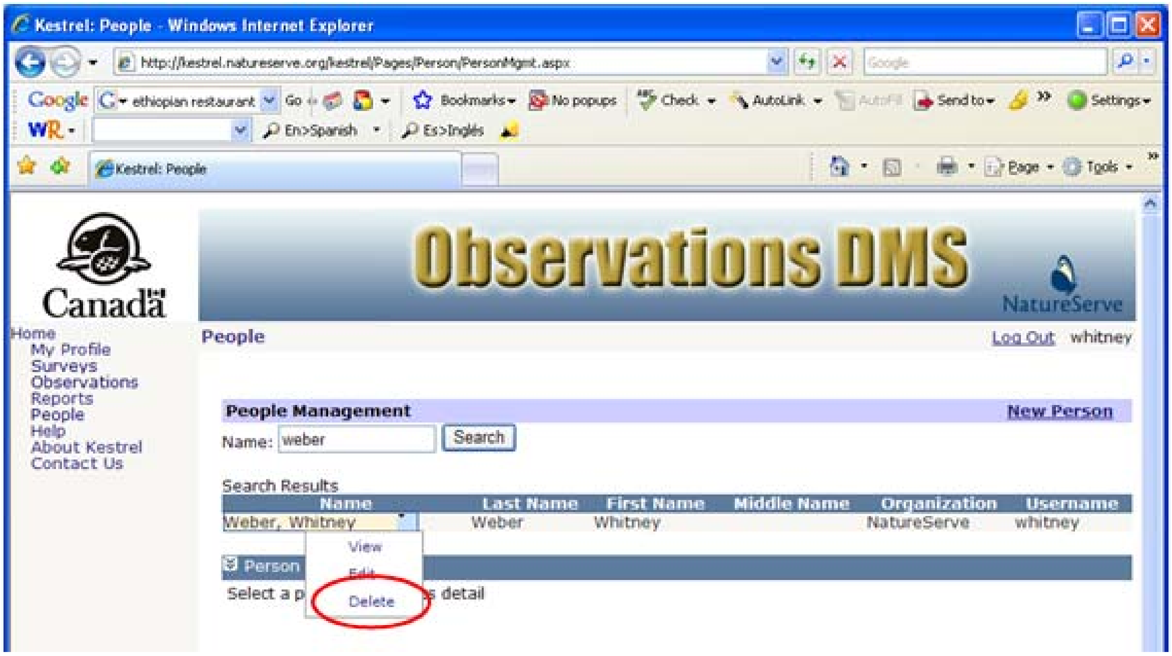
Delete Person

NOTE: A person record cannot be deleted if it is referenced as a Primary Observer within one or more observations or as a Survey Owner. Attempting to delete such a person record will result in the following message:

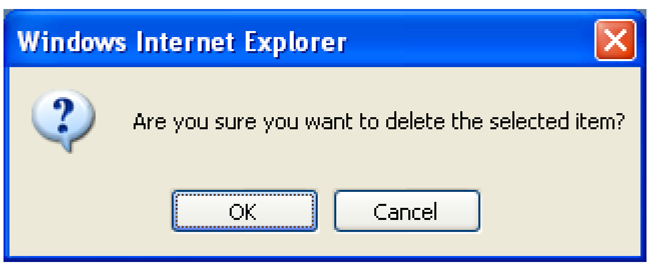
1. Within the *People* page, search for the person, by first or last name, whose record you wish to delete and choose **Search**.



2. Click on the person's name and select **Delete** from the dropdown list.

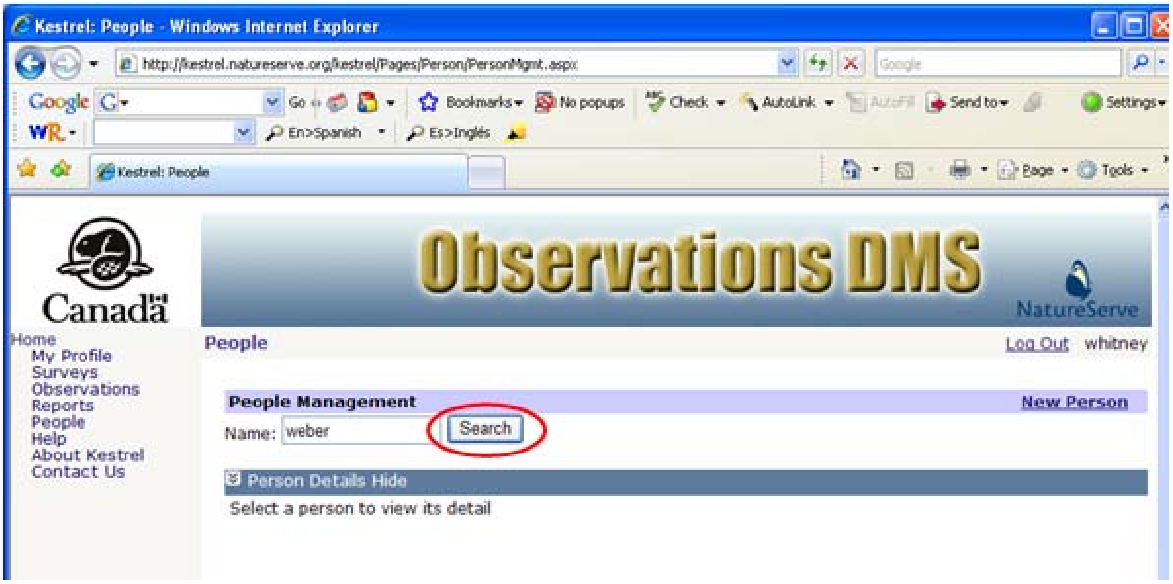


3. A popup window will prompt you as to whether you truly want to delete the Person. Click **OK** to delete the person or **Cancel** the deletion process.

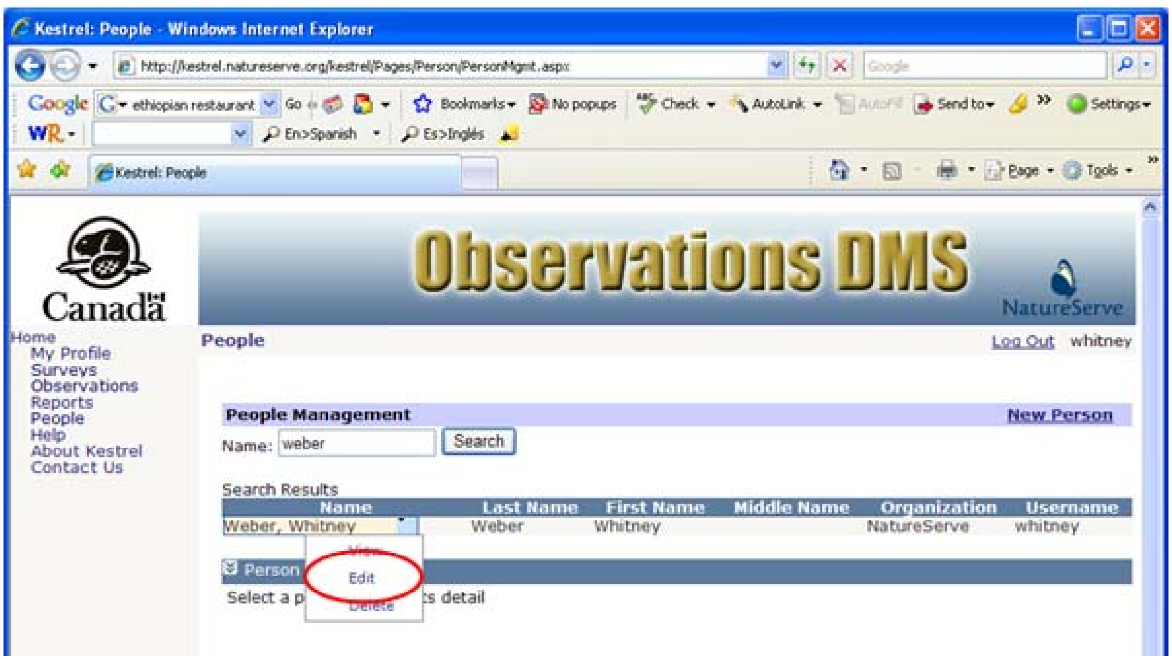


Edit Person

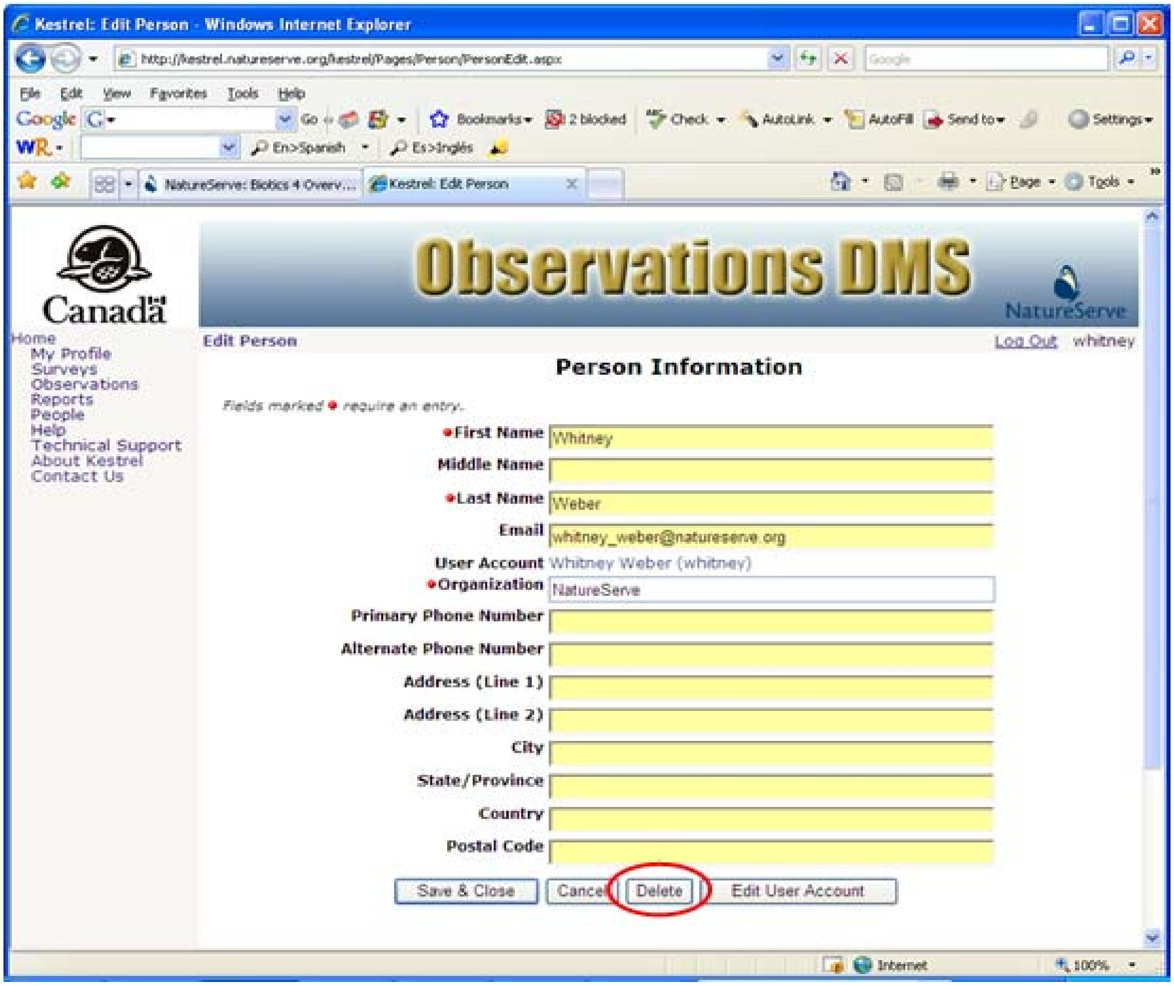
1. Within the *People* page, search for the person, by first or last name, whose record you wish to delete and choose **Search**.



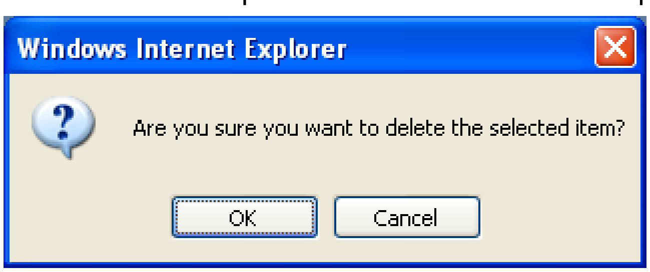
2. Click on the person's name and select **Edit** from the dropdown list.



3. Within the *Edit Person* page, select **Delete**.



4. A popup window will prompt you as to whether you truly want to delete the Person. Click **OK** to delete the person or **Cancel** the deletion process.



Related Tasks:

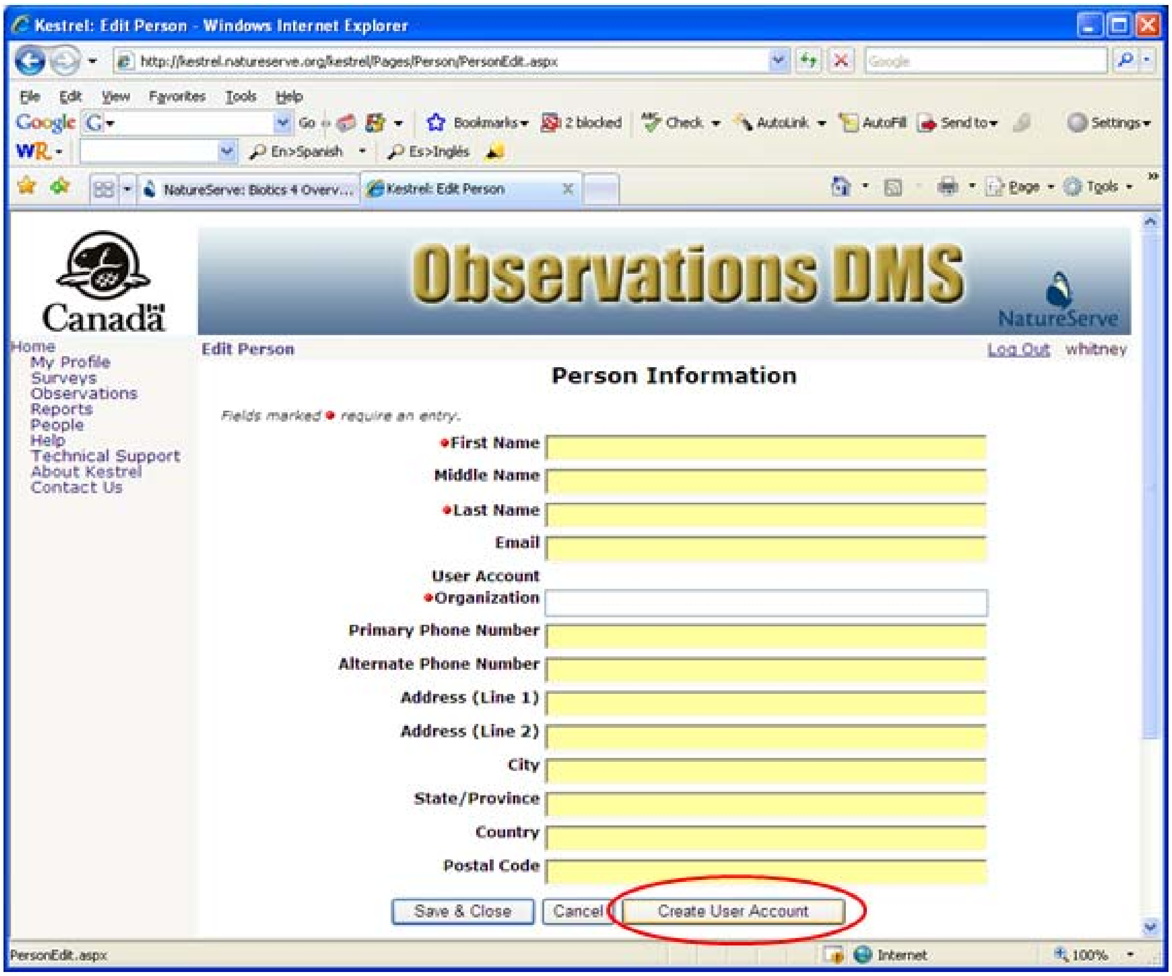
- Create New Person
- Edit Person
- Create User Account
- Edit User Account

Create User Account

If the person will be allowed access to the Kestrel website, grant the user privileges by creating a User account. The option to create a user account is only available while creating a Person (Create New Person) or editing a Person (Edit Person).

NOTE: In order to create a user account, the user logged in must have the role of an Administrator. Roles are defined on this *Create User Account* page.

1. Within the *Edit Person* page, select **Create User Account**.



2. In the *Edit User Account* page, fill out the various fields as appropriate. For further information on any of the fields, click the appropriate link below.
    - Username - Required
    - First Name - Required
    - Last Name - Required
    - Email Address - Required

- Active
- Roles - Required
- Password - Required

3. **Save & Close** the user account record.

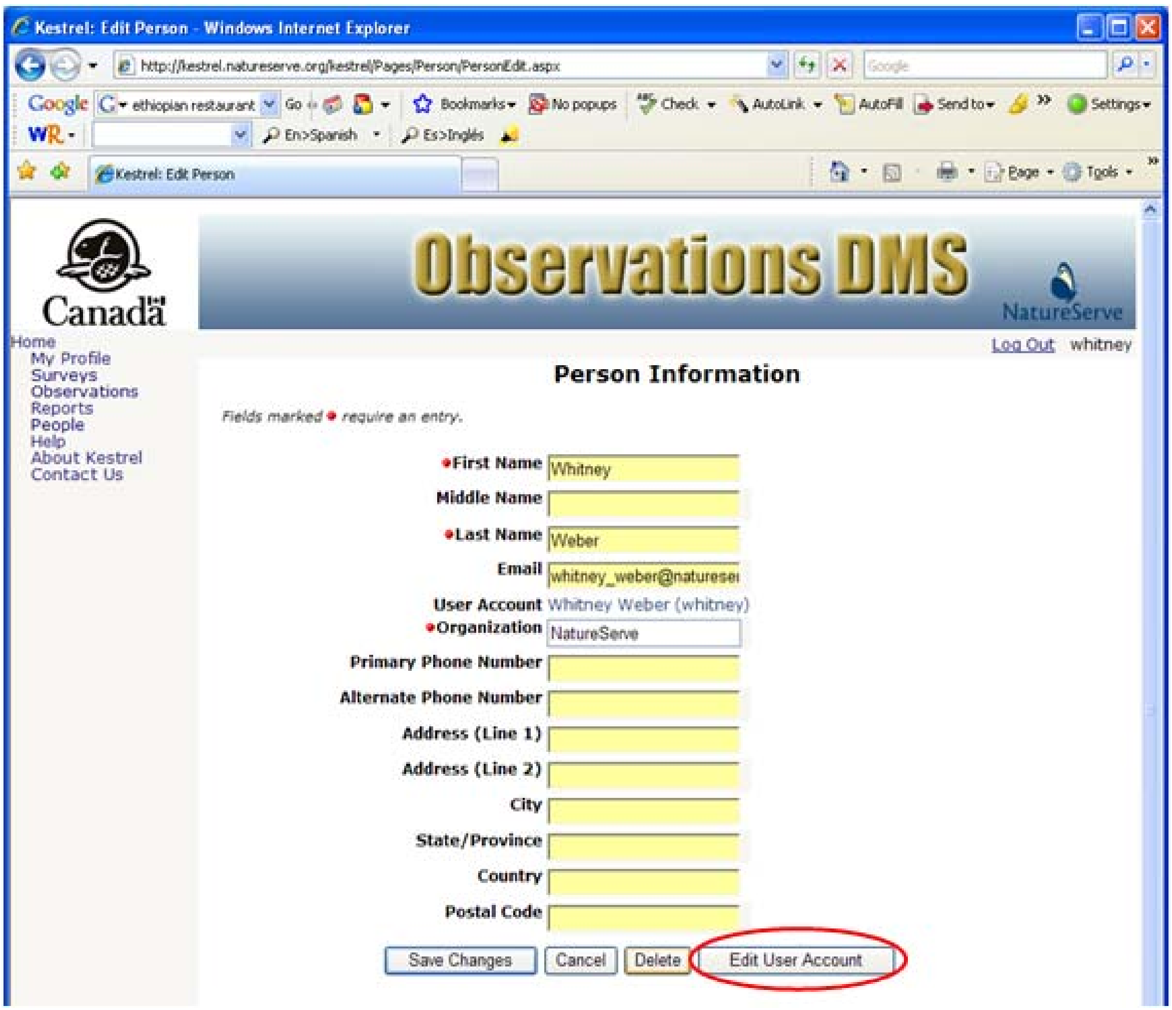
Related Tasks:

- Create New Person
- Edit Person
- Edit User Account

Edit User Account

Access to the Kestrel website is limited to individuals for which a User account exists. The options to Create User Account and Edit User Account are only available from the *Edit Person* page.

1. Within the *Edit Person* page, select **Edit User Account**.



2. In the *Edit User Account* page, fill out the various fields as appropriate. For further information on any of the fields, click the appropriate link below.
   - Username - Required
   - First Name - Required
   - Last Name - Required
   - Email Address - Required
   - Active
   - Roles - Required

- Password - Required

3. **Save & Close** the user account record.

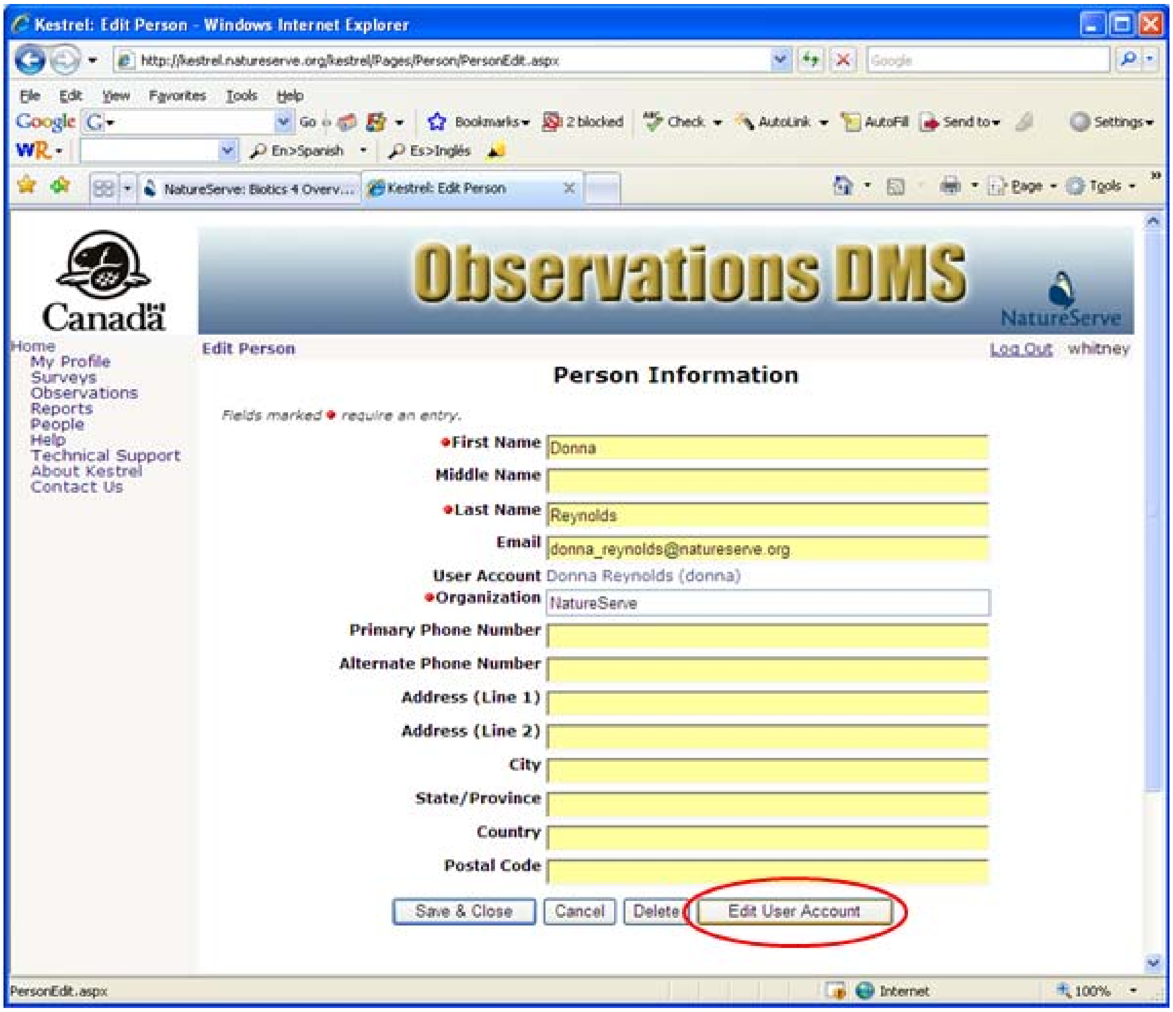
Related Tasks:

- Edit Person
- Create New Person
- Create User Account

Delete User Account

User Accounts are only available via the *Edit Person* page, reached by Create New Person or Edit Person.

1. Within the *Edit Person* page, select **Edit User Account**.



2. Within the *Edit User Account* page, select **Delete User Account**.

Related Tasks:

- Create New Person
- Edit Person
- Create User Account
- Edit User Account

Lists

Introduction to Lists

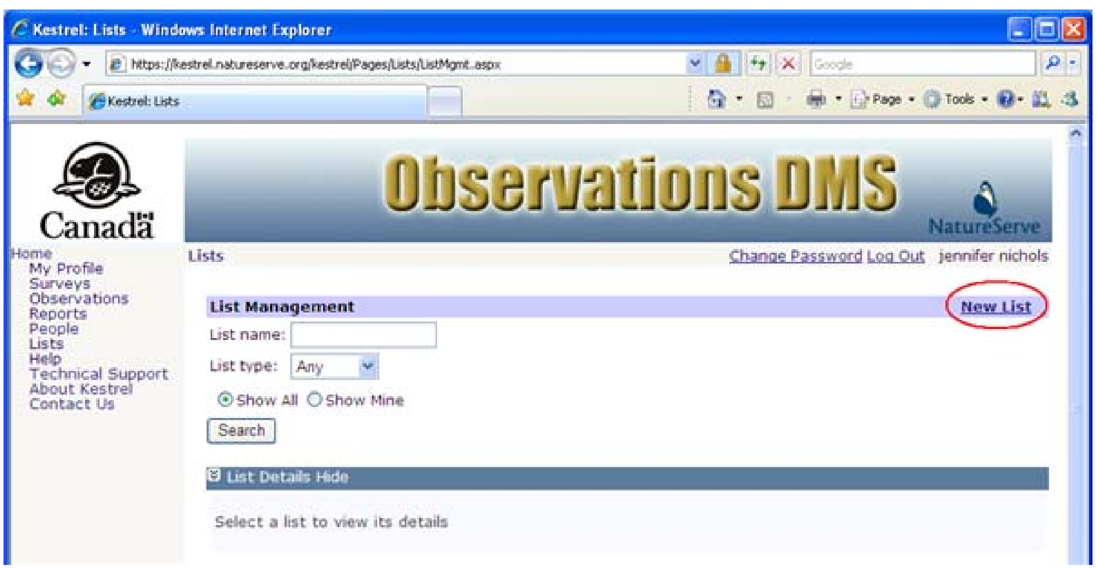
Tasks:

- Create New List
- Select Persons
- Select Users
- Select Species
- Select Locations
- View List
- Edit List
- Delete List
- Create a Copy of a List

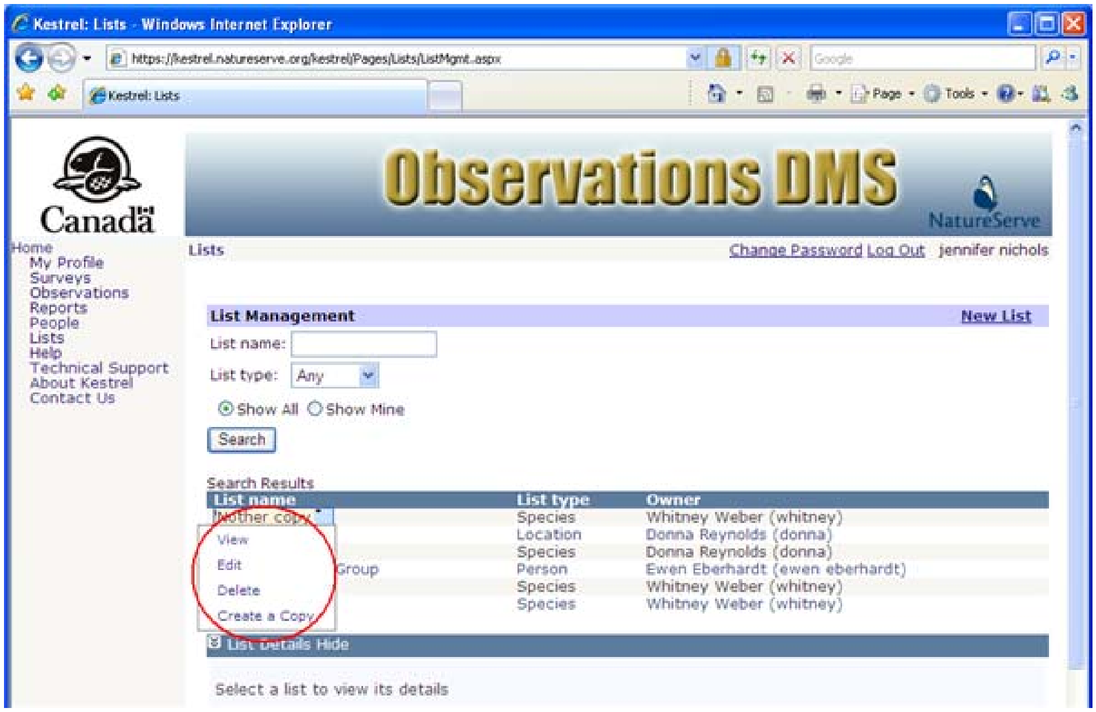
Methods of Navigation:

There are a number of ways to navigate through the *Lists* page:

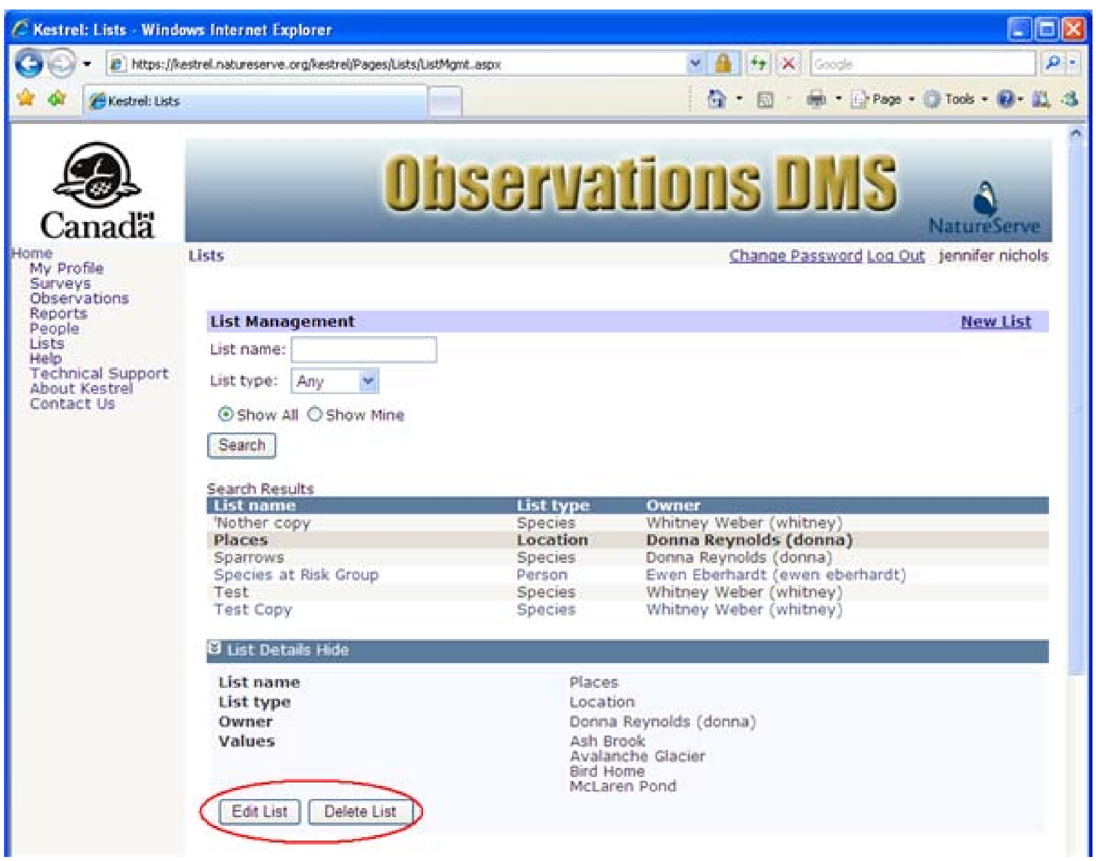
- Create a new list by clicking on the **New List** button.



- Display lists, using the default **Show All** or selecting the **Show Mine** radio button to restrict results to lists you have created, as desired. Click on a list name and from the dropdown list choose to **View**, **Edit**, or **Delete** the list, or **Create a Copy** of the list.



- Alternatively, **View** the list, from which point you can **Edit** or **Delete** the list.



List Attributes

The following fields are attributes of a list:

- List Name
- List Type
- List Owner
- Values

List Name

Unique name that identifies the list.

Related Tasks:

- Edit List

Page: Edit List
Field: List Name
Database Table: LIST
Column: string_val
AttributeDefinition_ID:
Data Type: VARCHAR2(4000)
Optionality: NOT NULL
Default Value:
Column linking to Parent Table:
Foreign Key from:
Column Name:
Display Column:

List Type

The named entity represented by the values in the list, specifically person, user, species, or location.

Select the list type from the List Type dropdown list.

Page: Edit List
Field: List Type
Database Table: LIST
Column: string_val
AttributeDefinition_ID:
Data Type: VARCHAR2(4000)
Optionality: NOT NULL
Default Value:
Column linking to Parent Table:
Foreign Key from:
Column Name:
Display Column:

List Owner

Name of the person that created the list. The system will automatically populate this field with the name of the user that is logged into the application when the list is created.

Page:
Field:
Database Table: LIST
Column: owner_list
AttributeDefinition_ID:
Data Type: VARCHAR2(4000)
Optionality: NOT NULL
Default Value:
Column linking to Parent Table: owner_person_x
Foreign Key from: PERSON
Column Name:
Display Column:

Values

Set of names that comprise a list. For example, the values for a user-type list would consist of selected names of users.

Related Tasks:

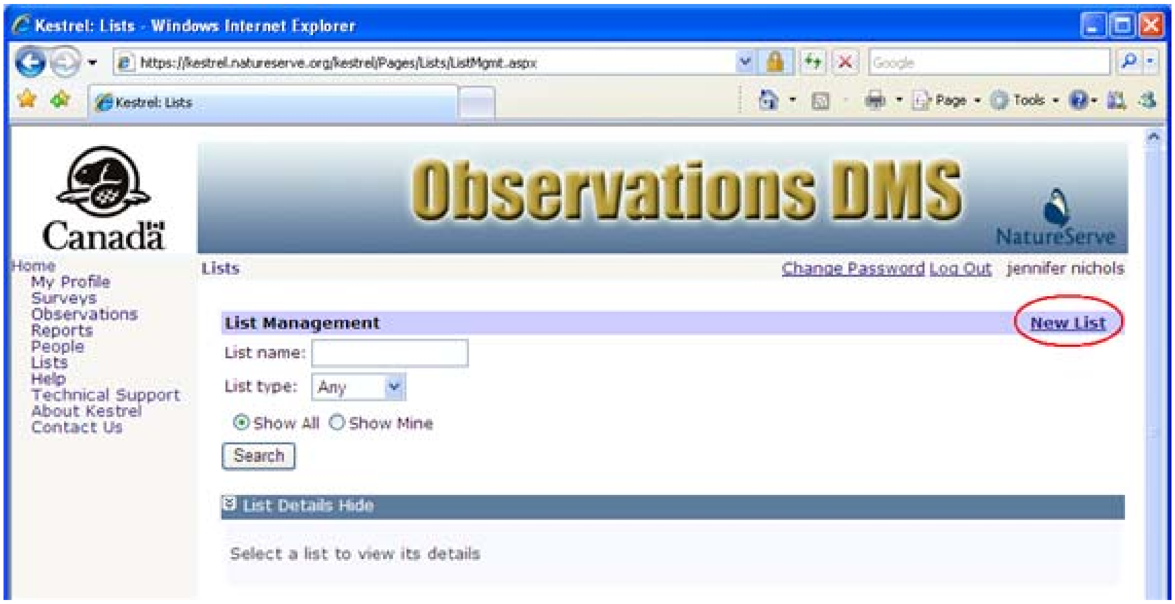
- Create New List
- Select Persons
- Select Users
- Select Species
- Select Locations

Page: Edit List
Field: Values
    Database Table: LIST
        Column:
        AttributeDefinition_ID:
        Data Type: VARCHAR2(4000)
        Optionality: NULL
        Default Value:
        Column linking to Parent Table:
    Foreign Key from:
        Column Name:
        Display Column:

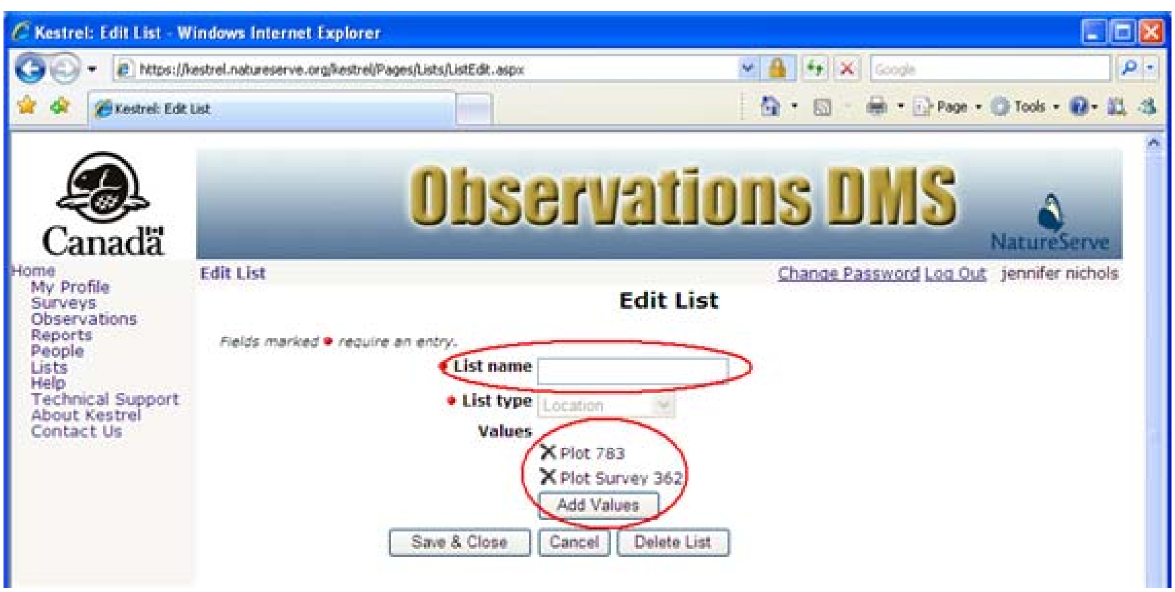
Tasks

Create a List

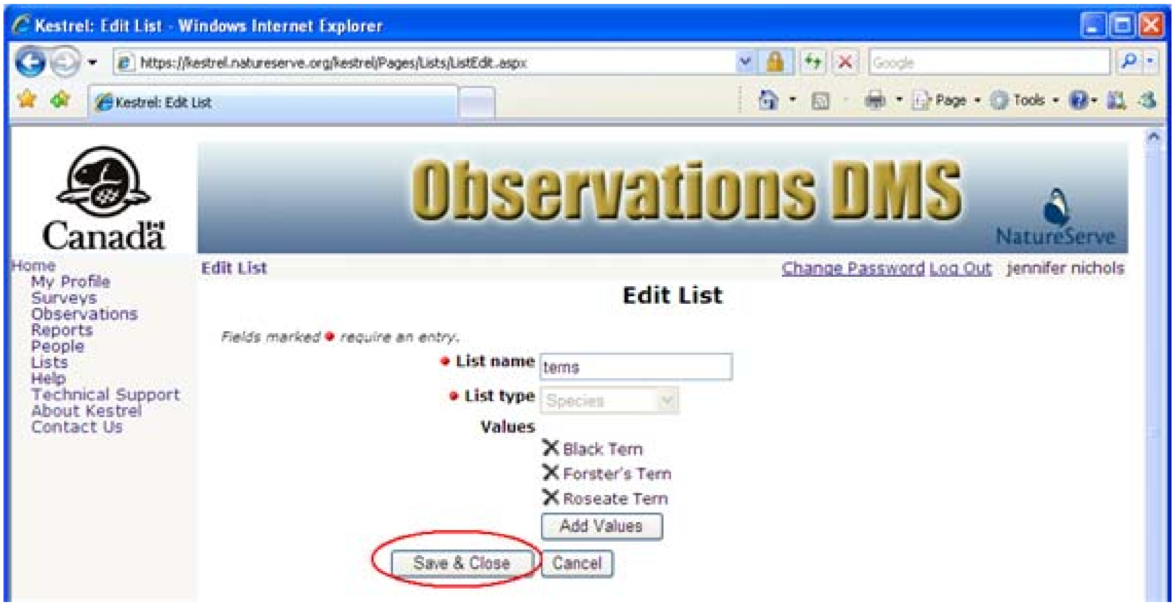
1. Within the *Lists* page, click the **New List** link.



2. Within the *Edit List* page, fill out the various fields with appropriate information. For further information on any of the fields, click the appropriate link below.
   - List Name - Required
   - List Type - Required
   - Values



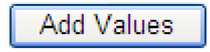
3. **Save & Close** the list.



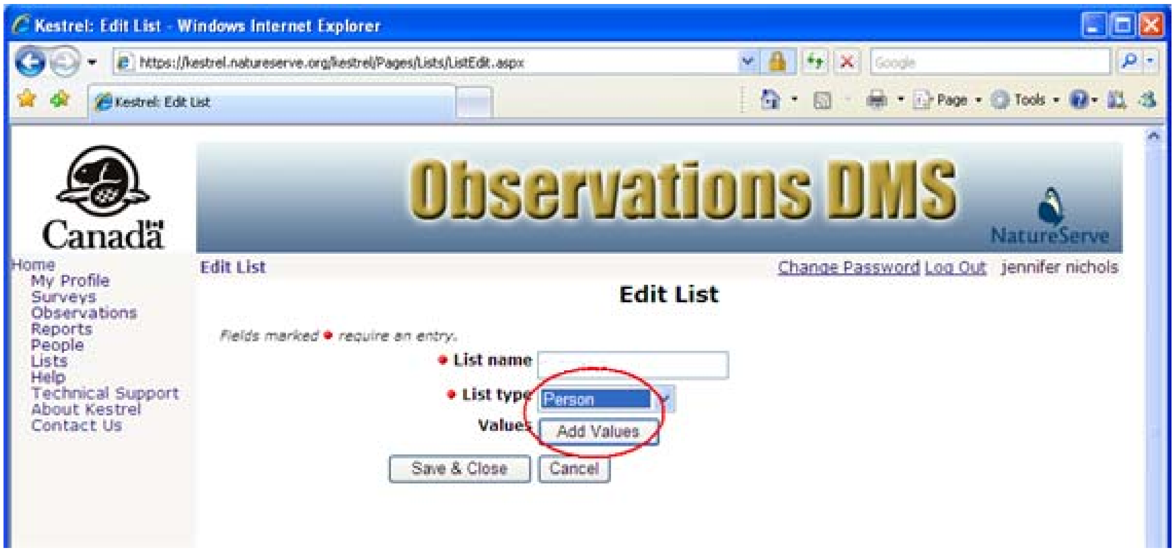
Related Tasks:

- Select Persons
- Select Users
- Select Species
- Select Locations
- Edit List
- Delete List

Select Persons

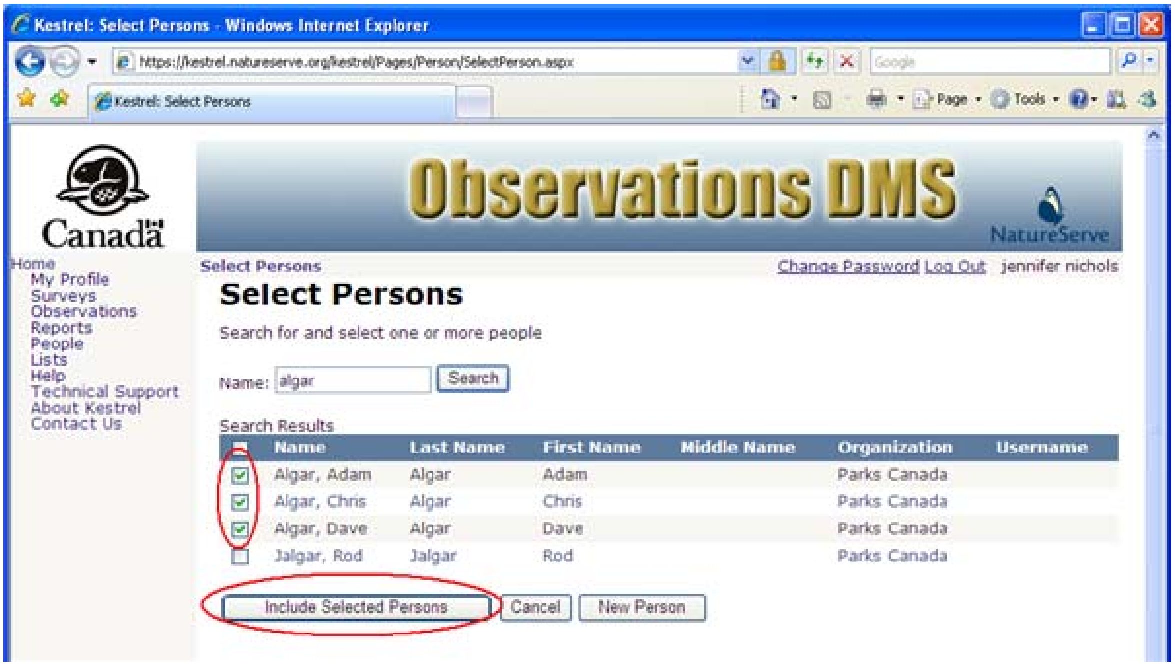
1. Within the *Edit List* page, select Person as the List Type, and click the 

button to select the values for the list.

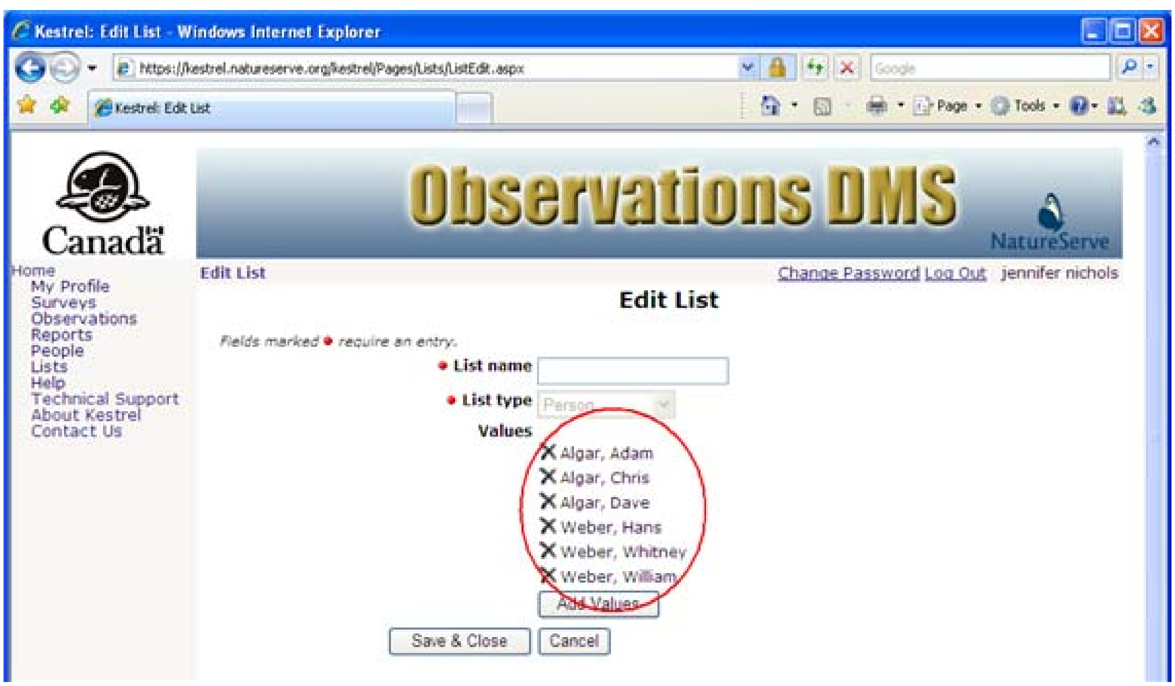


2. Within the *Select Persons* page, type in a person by first or last name and click **Search**, or to get an entire list of all person records, merely click **Search**.

3. Check the boxes next to the persons in the Search Results that are to be added to the list, and click the **Include Selected Persons** button. This will return you to the *Edit List* page, populating the Values section of the page with the persons selected.

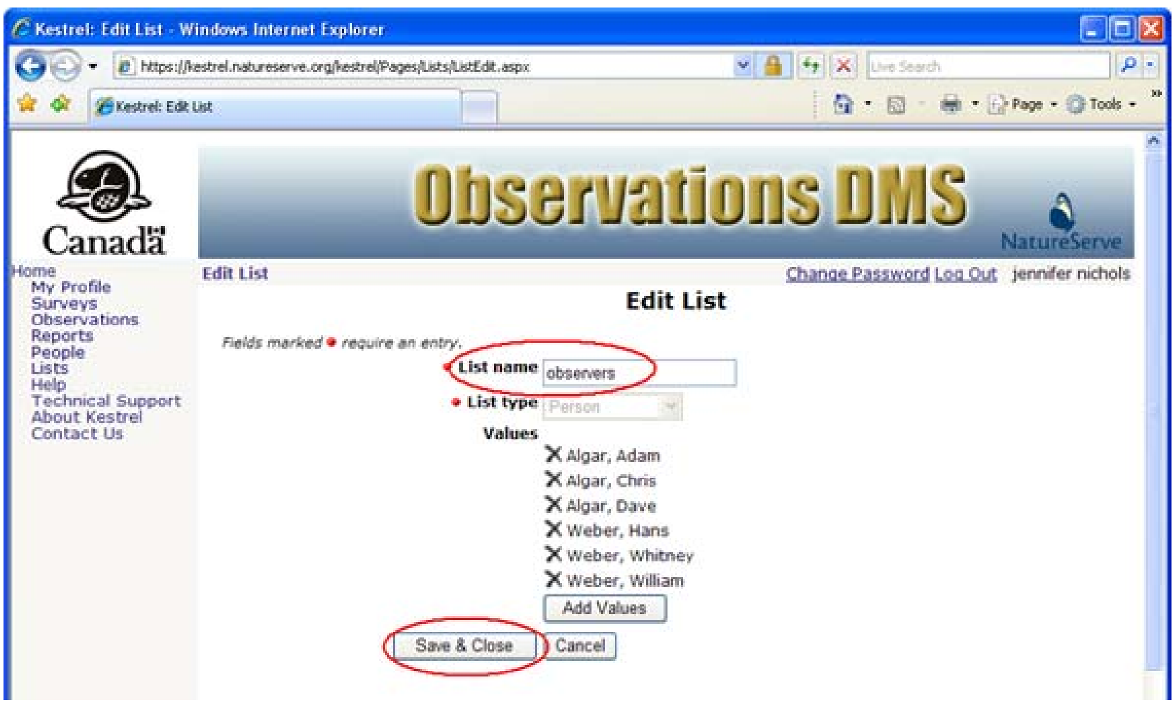


4. To add additional persons to the list, repeat Steps 2 and 3, above. Note that selections can only be included from a single page of results at a time. To remove a selected value from the list, click the X next to that value.



5. If a record has not yet been created for a person to be included on the list, click the **New Person** button to proceed to the *Person Information* page. See the Create New Person topic for information on how to enter data to create the record.

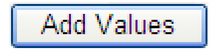
6. When all persons to be included in the list have been selected, enter a name for the list and click **Save & Close** to return to the *Lists* page.



Related Tasks:

- Create New List
- Edit List

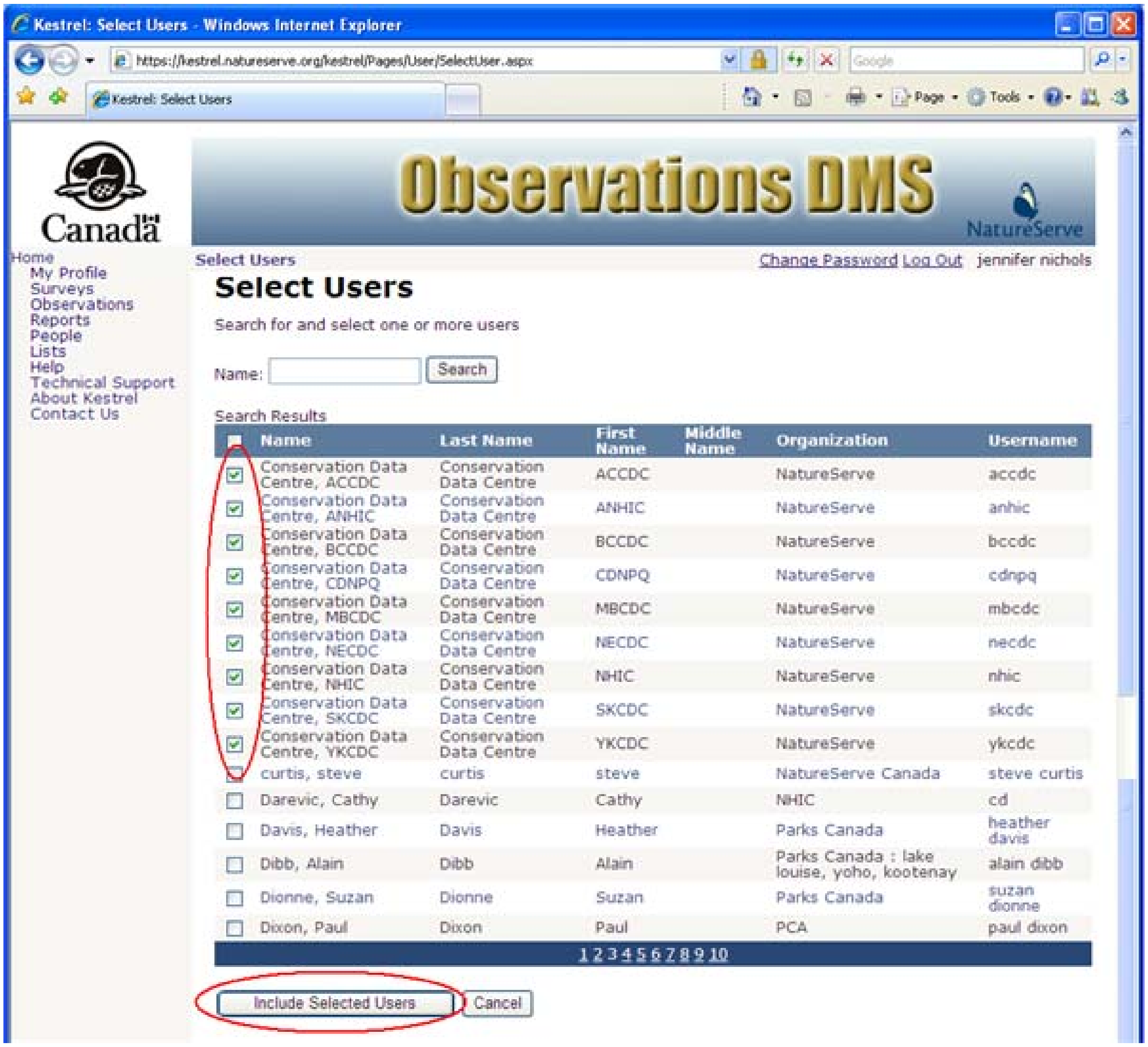
Select Users

1. Within the *Edit List* page, select User as the List Type, and click the 

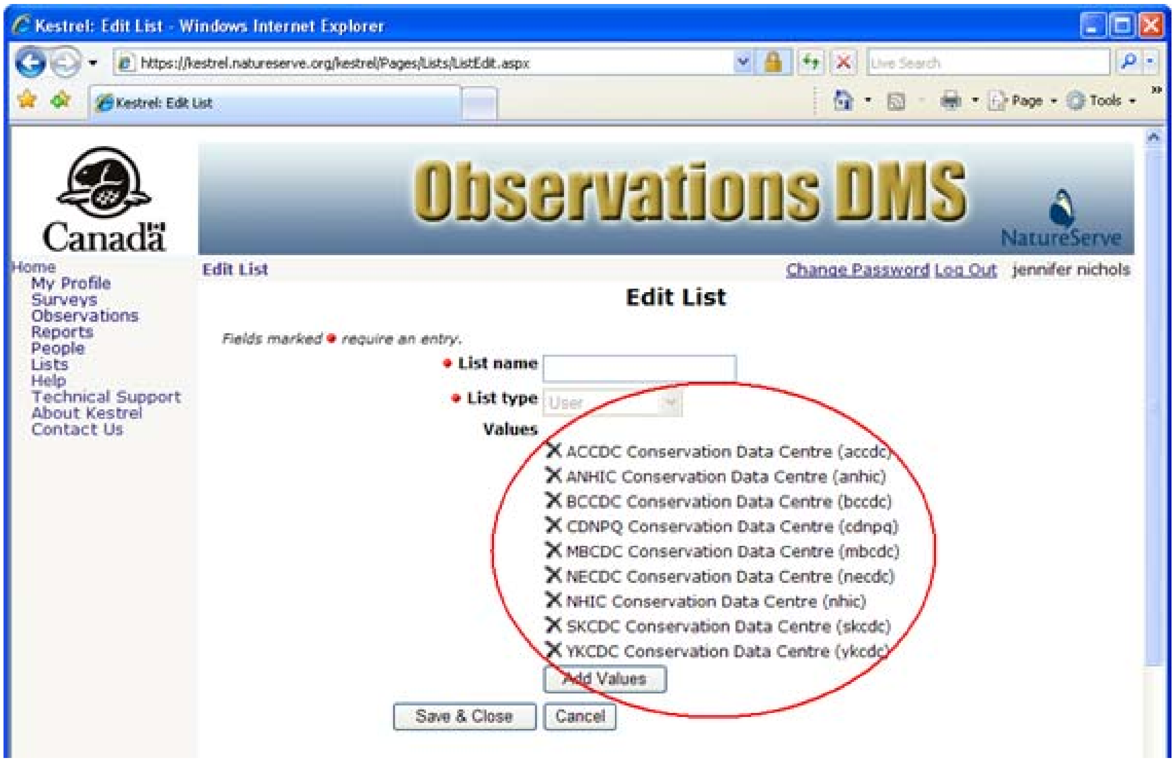
button to select the values for the list.

2. Within the *Select Users* page, type in a user by first or last name and click **Search**, or to get an entire list of all user records, merely click **Search**.

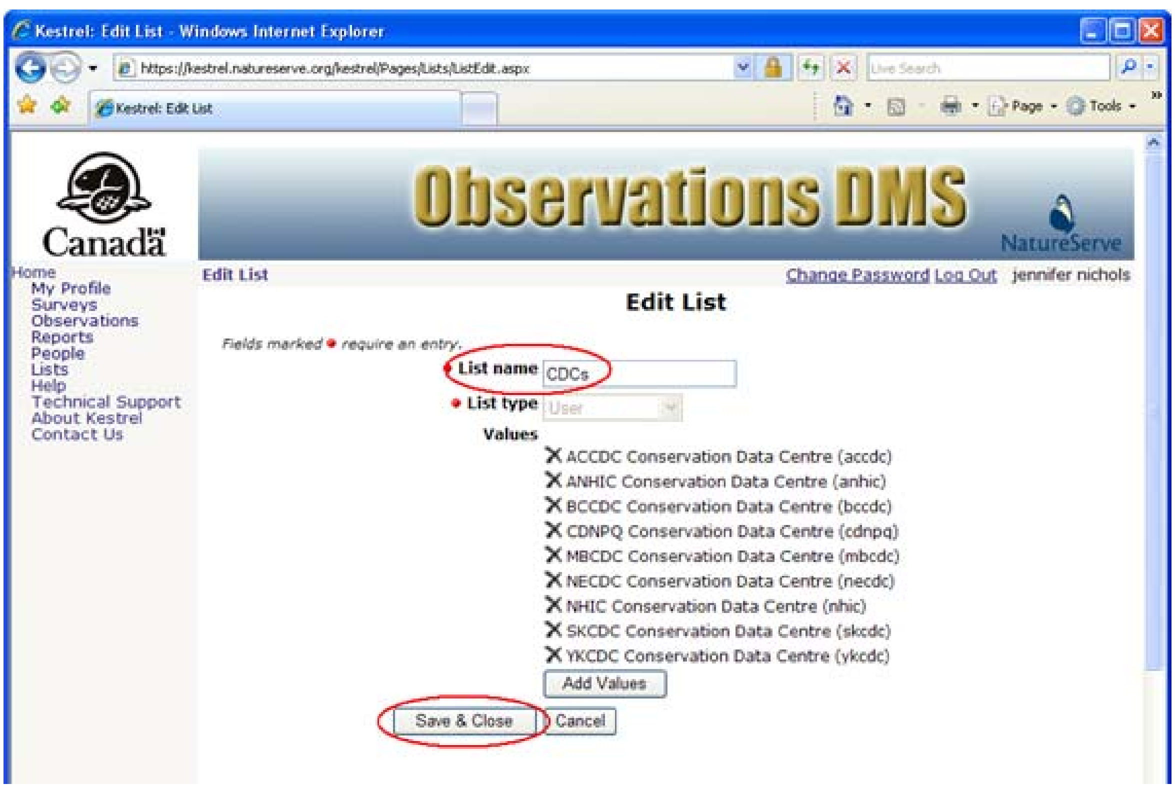
3. Check the boxes next to the users in the Search Results that are to be added to the list, and click the **Include Selected Users** button. This will return you to the *Edit List* page, populating the Values section of the page with the users selected.



4. To add additional users to the list, repeat Steps 2 and 3, above. Note that selections can only be included from a single page of results at a time. To remove a selected value from the list, click the ✕ next to that value.



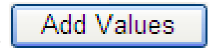
5. When all users to be included in the list have been selected, enter a name for the list and click **Save & Close** to return to the *Lists* page.



Related Tasks:

- Create New List
- Edit List

Select Species

1. Within the *Edit List* page, select Species as the List Type, and click the 

 button to select the values for the list.

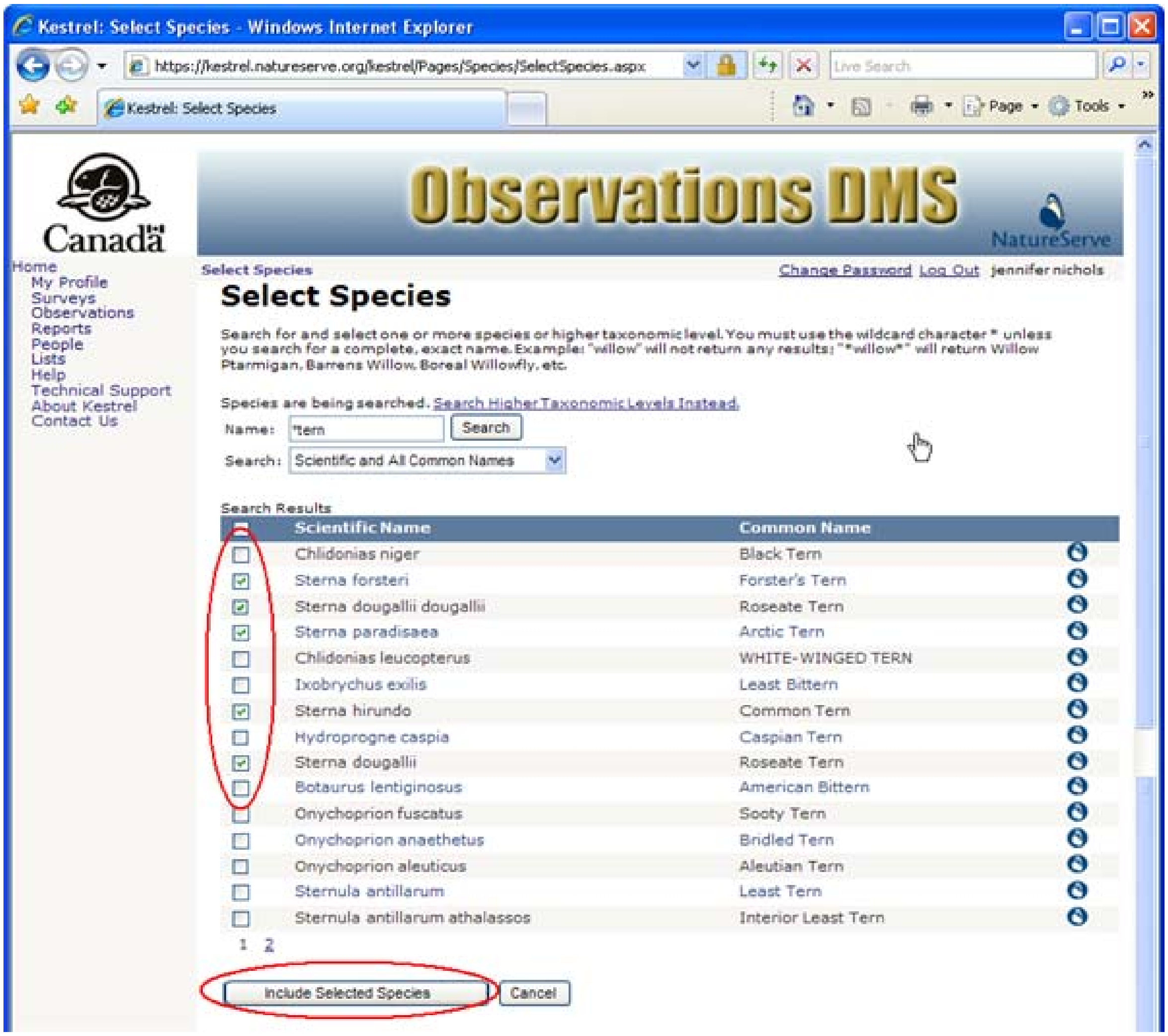
2. Species to be included in the list can be searched in one of two ways:
   - Use common or scientific name (at the genus and species level)
   - Use higher taxonomic levels

Use common or scientific name

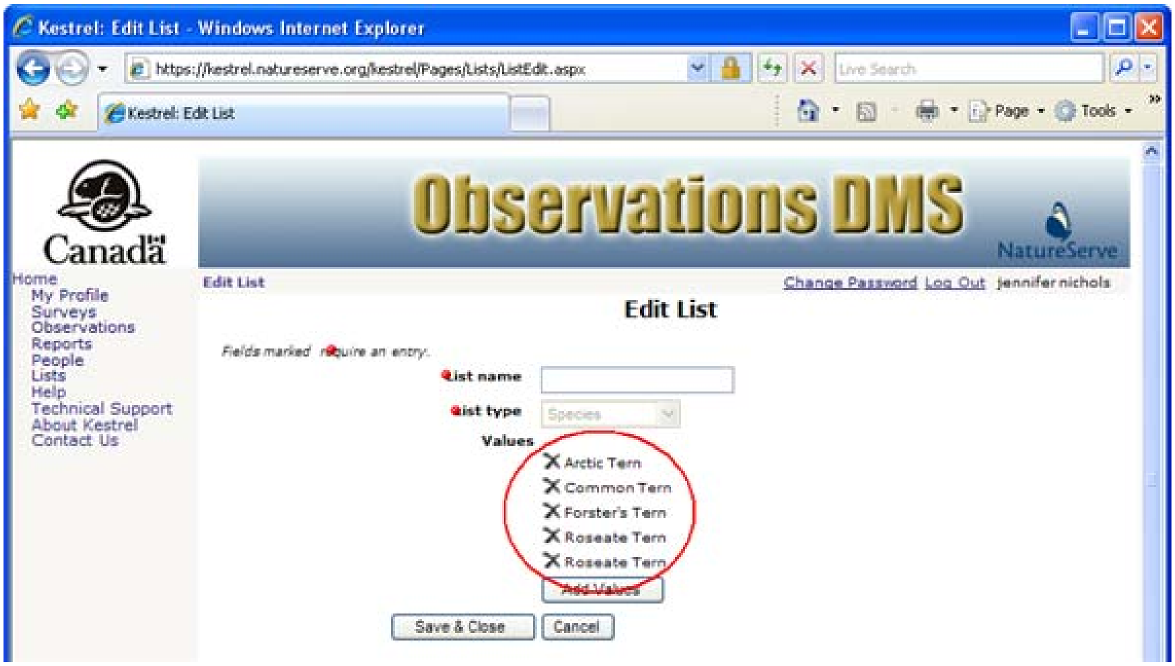
1. Within the *Select Species* page, type in part or all of the scientific or common name and specify which you will be searching on by selecting the appropriate value from the Search dropdown list. Click **Search**.

   NOTE: Use * as the wildcard indicator. (i.e., *tern will return Aleutian Tern, American Bittern...)

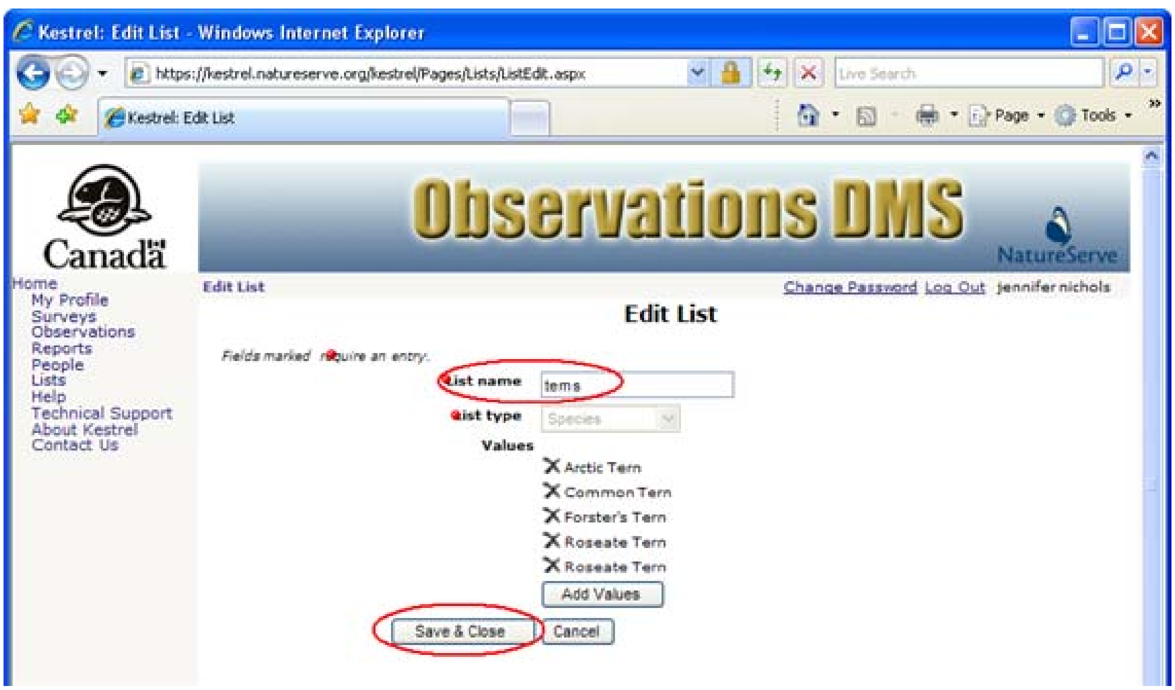
2. Check the boxes next to the species in the Search Results that are to be added to the list, and click the **Include Selected Species** button. This will return you to the *Edit List* page, populating the Values section of the page with the species selected.



3. To add additional species to the list, repeat Steps 1 and 2, above. Note that species selected can only be included from a single page of results at a time. To remove a selected value from the list, click the next to that value.



4. When all species to be included in the list have been selected, enter a name for the list and click **Save & Close** to return to the *Lists* page.



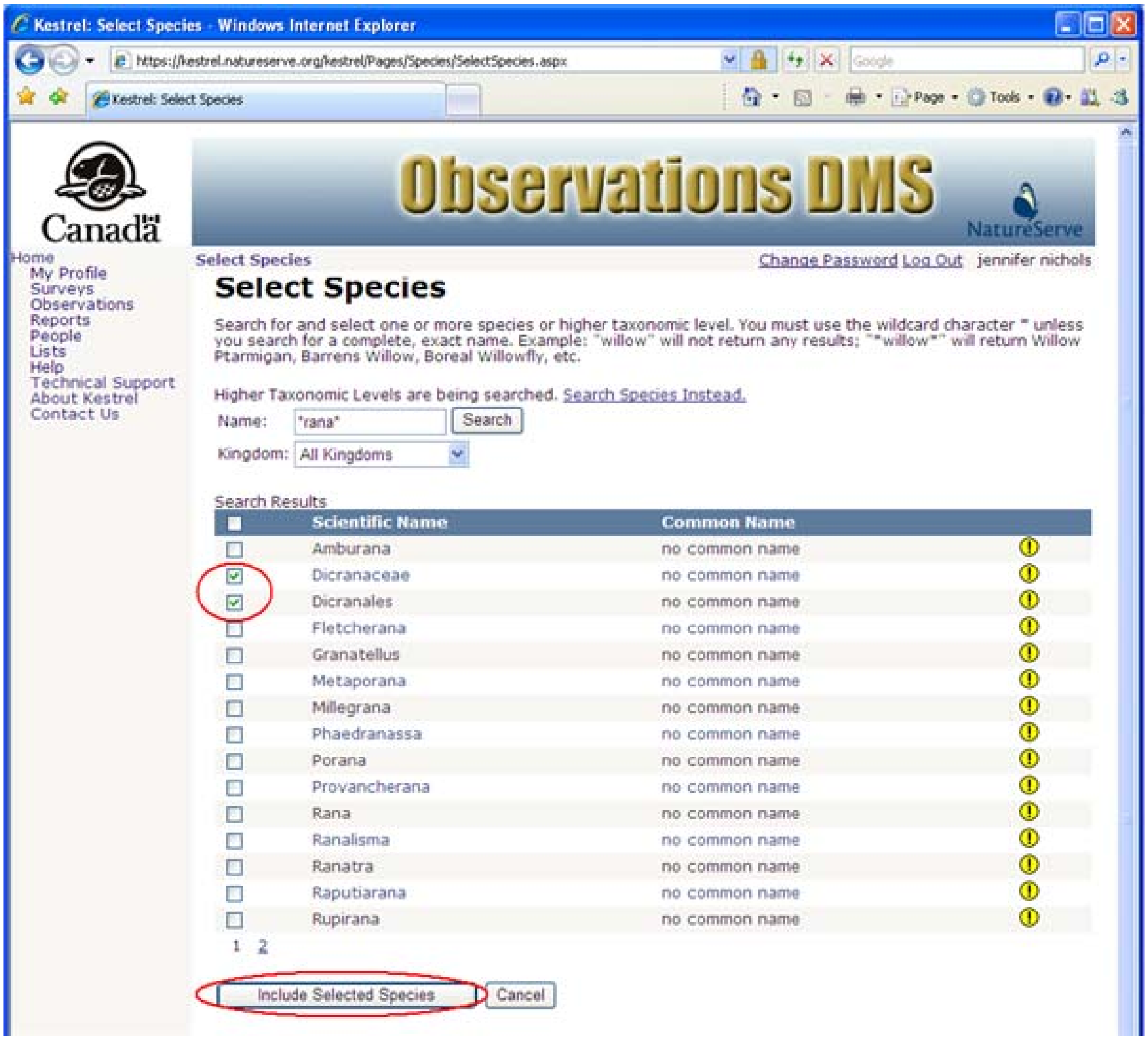
Use higher taxonomic levels

1. Within the *Select Species* page, click on **Search Higher Taxonomic Levels** Instead.

2. Type in a name and specify which taxonomy you will be searching on by selecting the appropriate value from the Search dropdown list. Click **Search**.

NOTE: Use * as the wildcard indicator. (i.e., *rana* will return Amburana, Dicranaceae, Dicranales…)

3. Check the boxes next to the names in the Search Results that are to be added to the list, and click the **Include Selected Species** button. This will return you to the *Edit List* page, populating the Values section of the page with the selection(s).



4. To add additional names to the list, repeat Steps 2 and 3, above. Note that selections can only be included from a single page of results at a time. To remove a selected value

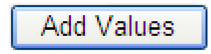
from the list, click the  next to that value.

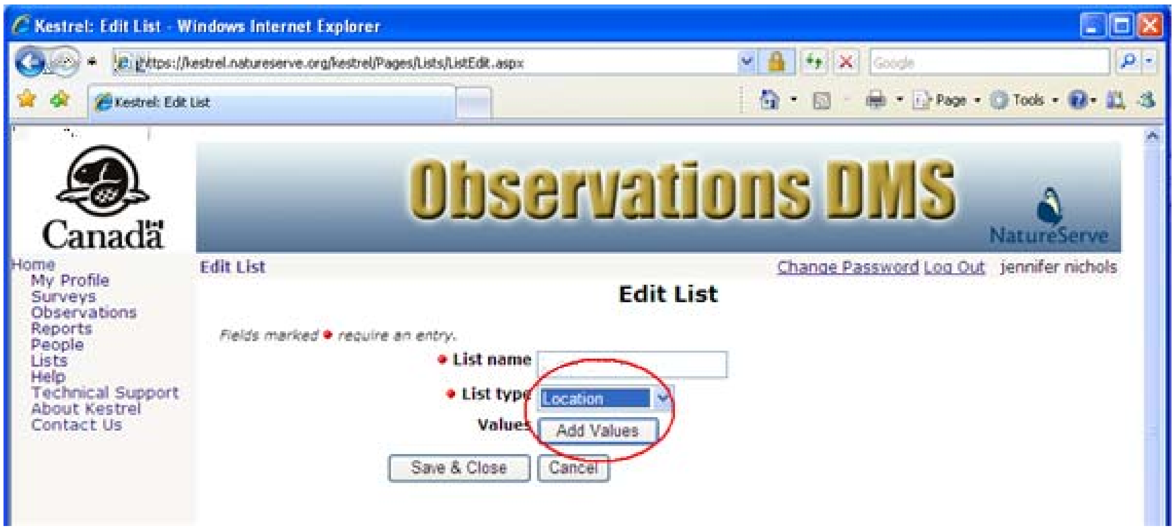
5. When all selections for the list have been made, enter a name for the list and click **Save & Close** to return to the *Lists* page.

Related Tasks:

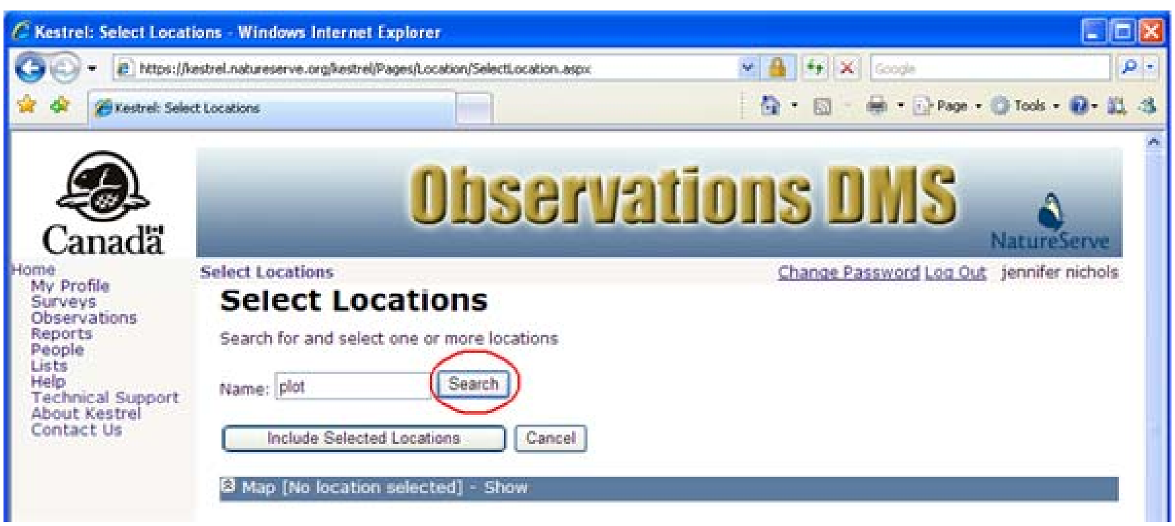
- Create New List
- Edit List

Select Locations

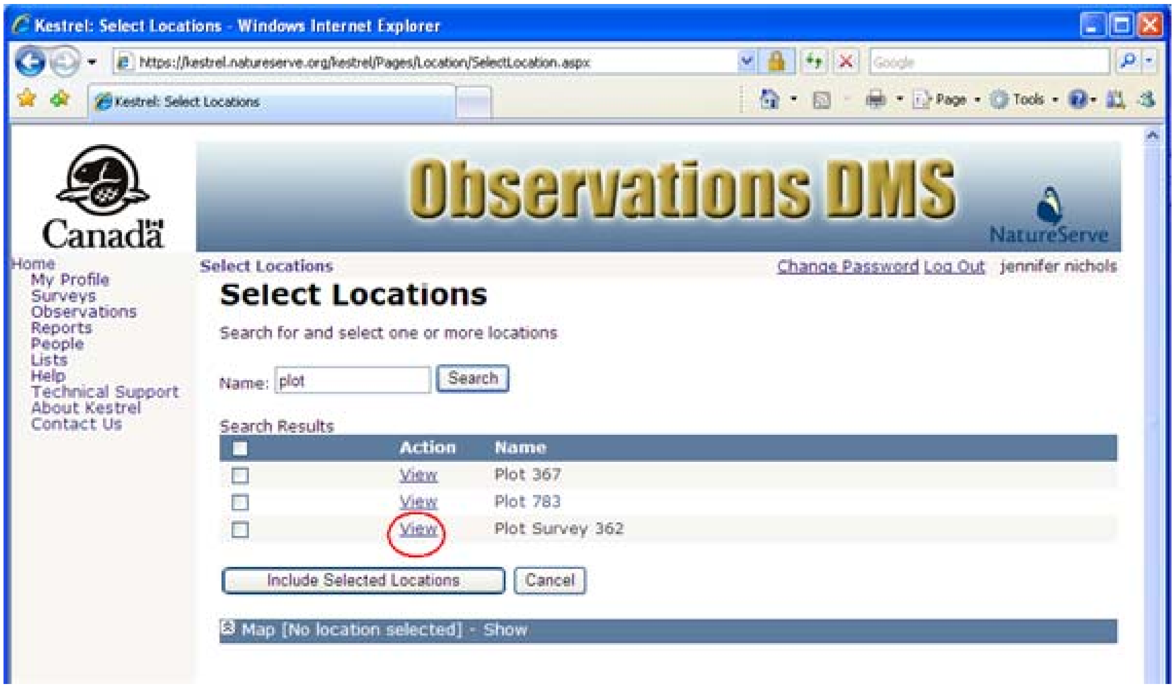
1. Within the *Edit List* page, select Location as the List Type, and click the  button to select the values for the list.



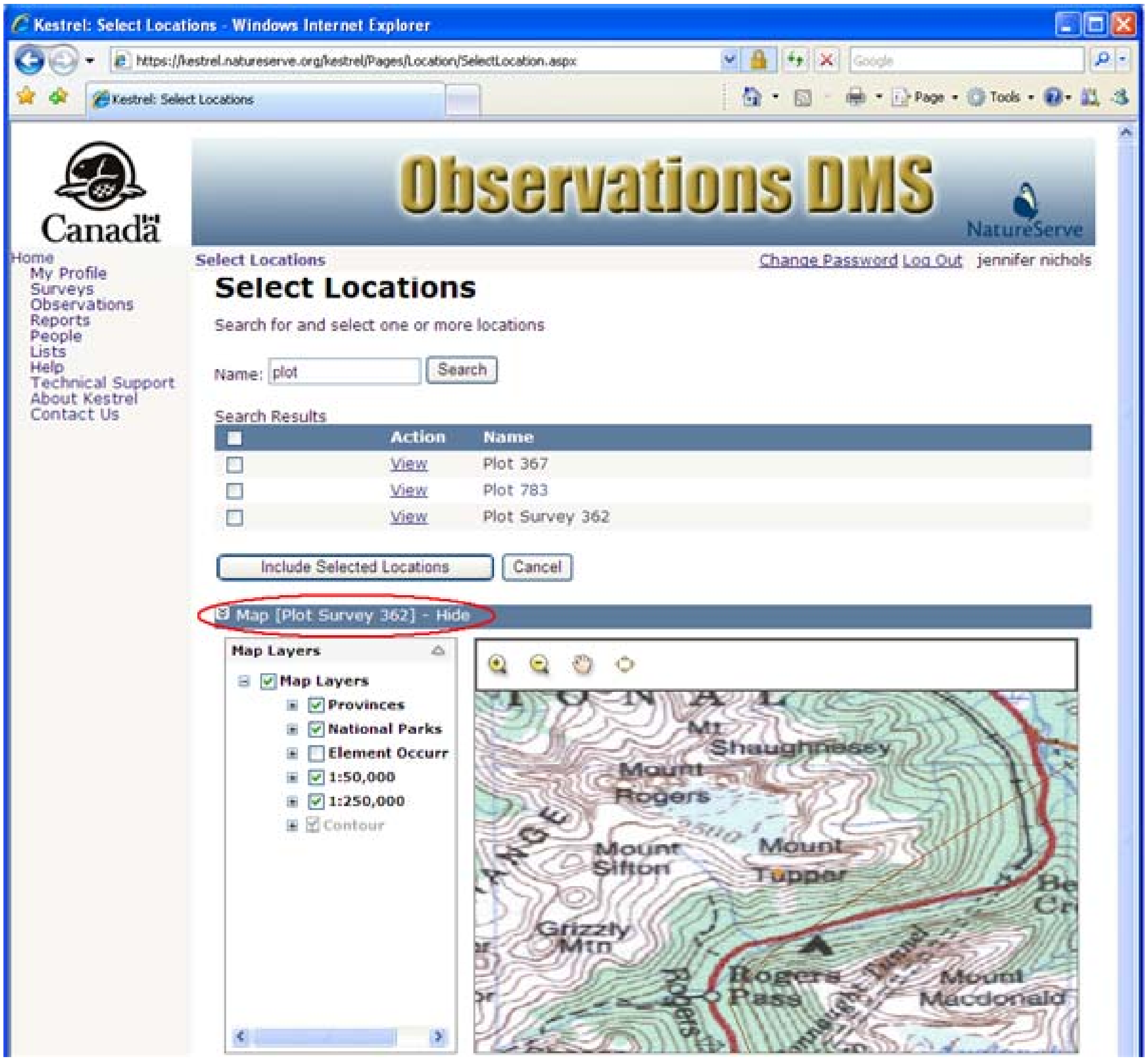
2. Within the *Select Locations* page, type in a location and click **Search**, or to get an entire list of all locations, merely click **Search**.



3. If desired, click **View** next to an entry in the Search Results to display that location on the map.

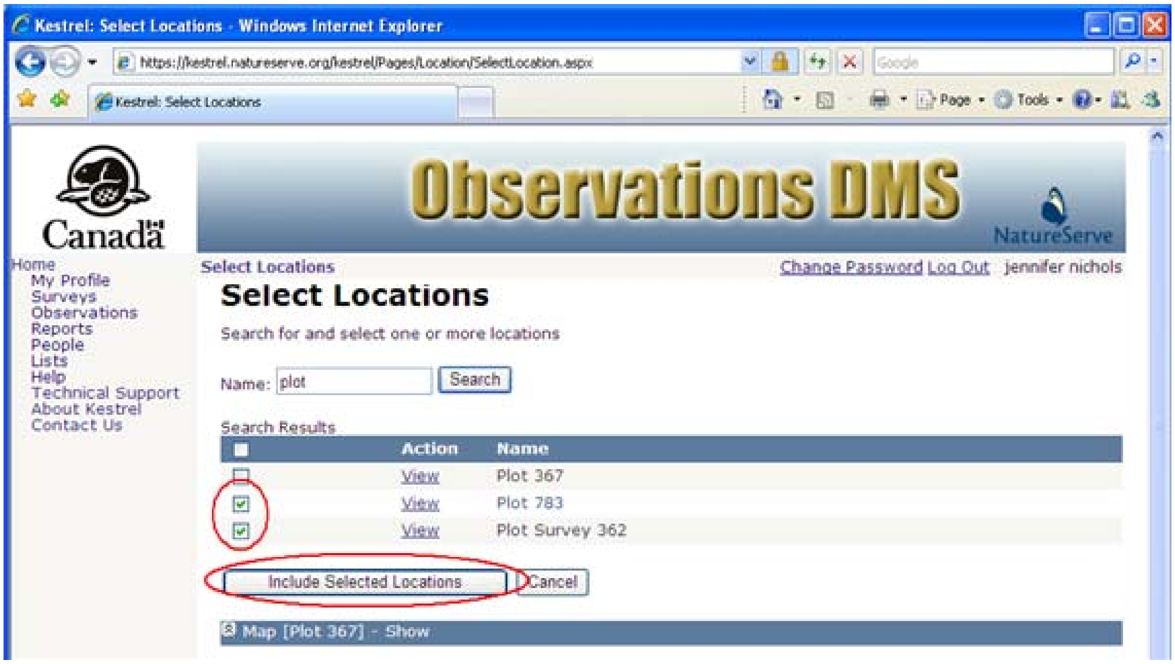


4. To show the map for the location, click the icon to expand the Map section displayed beneath the Search Results. Click the icon to hide the Map section.

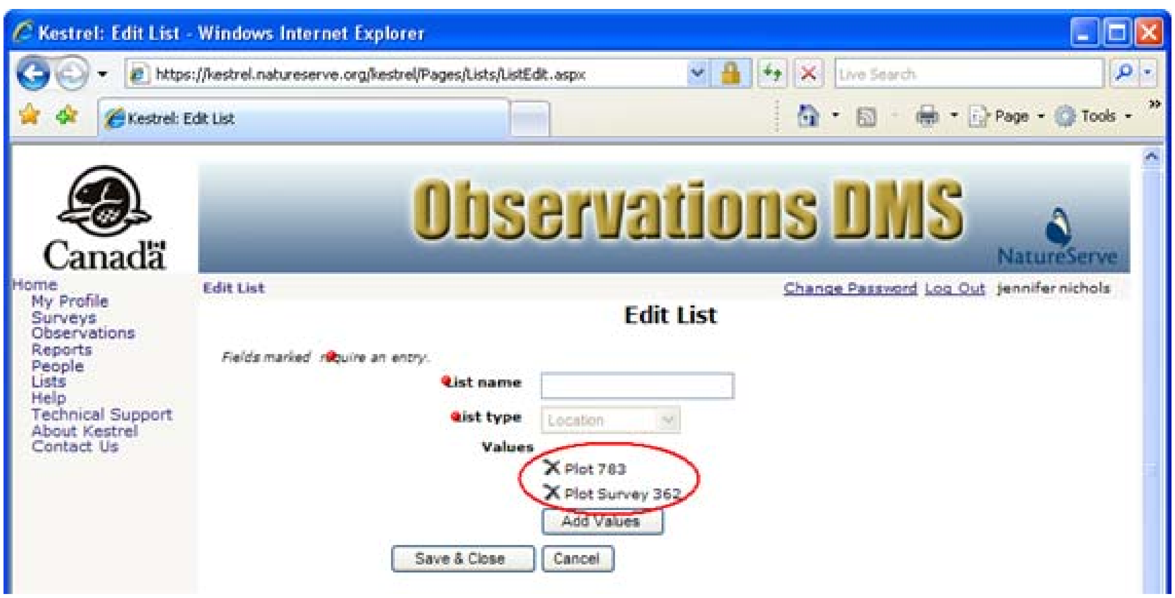


NOTE: See Mapping Tools for more information regarding using the tools associated with the mapping application.

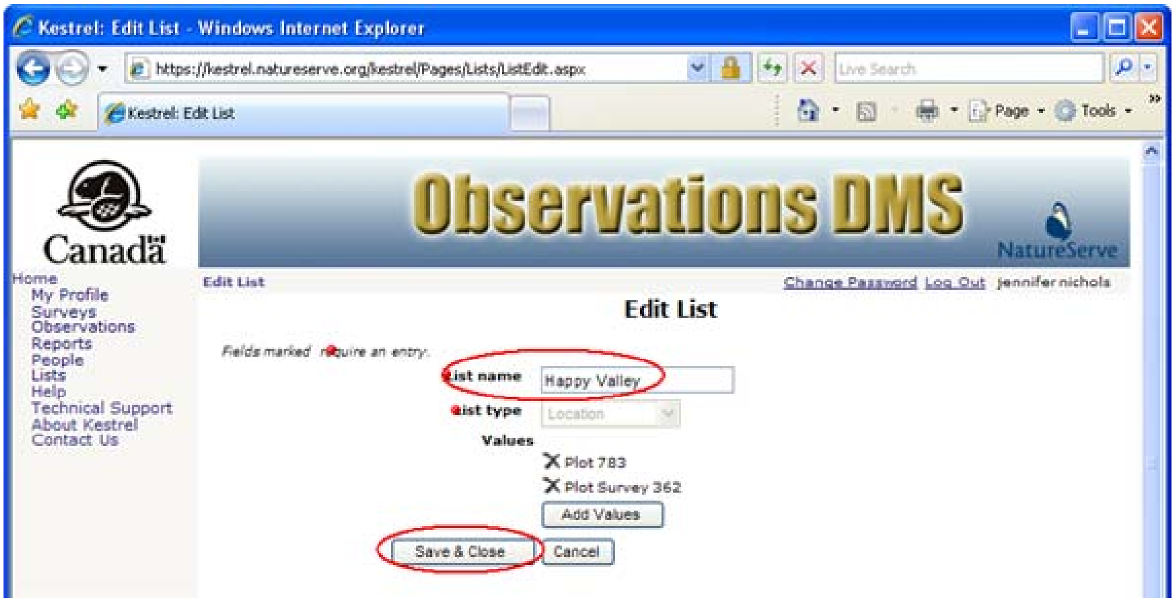
5. Check the boxes next to the locations in the Search Results that are to be added to the list, and click the **Include Selected Locations** button. This will return you to the *Edit List* page, populating the Values section of the page with the locations selected.



6. To add additional locations to the list, repeat Steps 2 through 5, above. Note that selections can only be included from a single page of results at a time. To remove a selected value from the list, click the next to that value.



7. When all locations to be included in the list have been selected, enter a name for the list and click **Save & Close** to return to the *List Management* page.

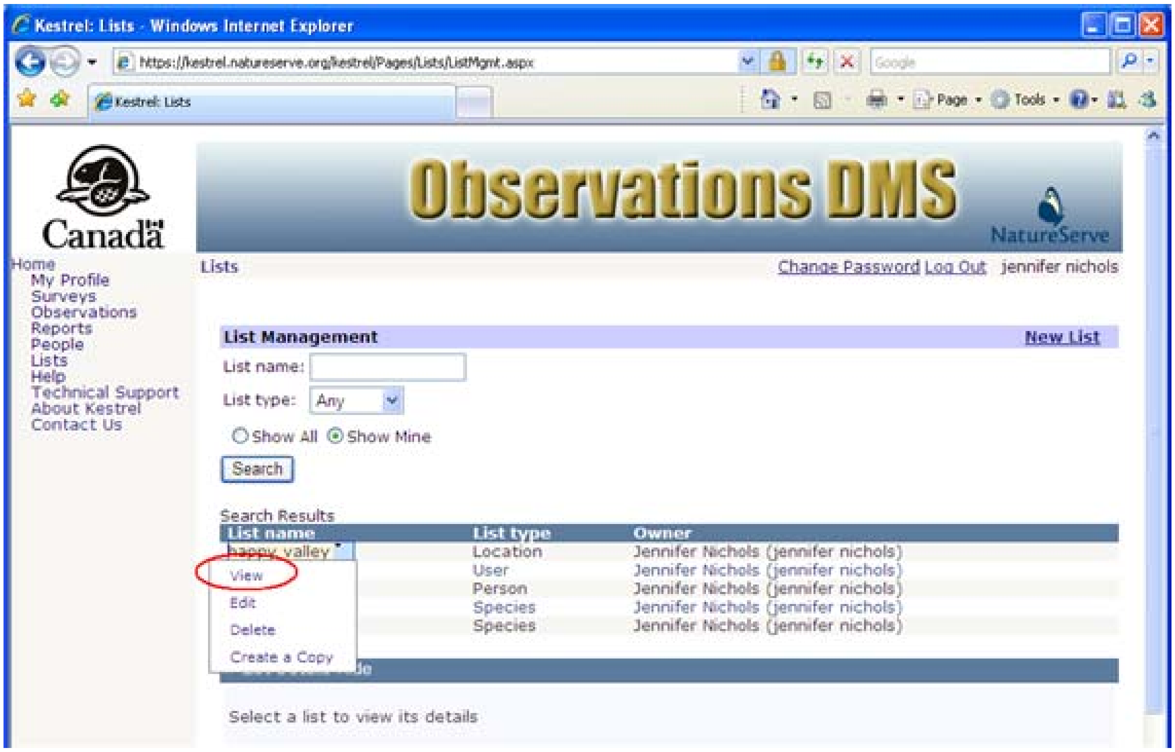


Related Tasks:

- Create New List
- Edit List

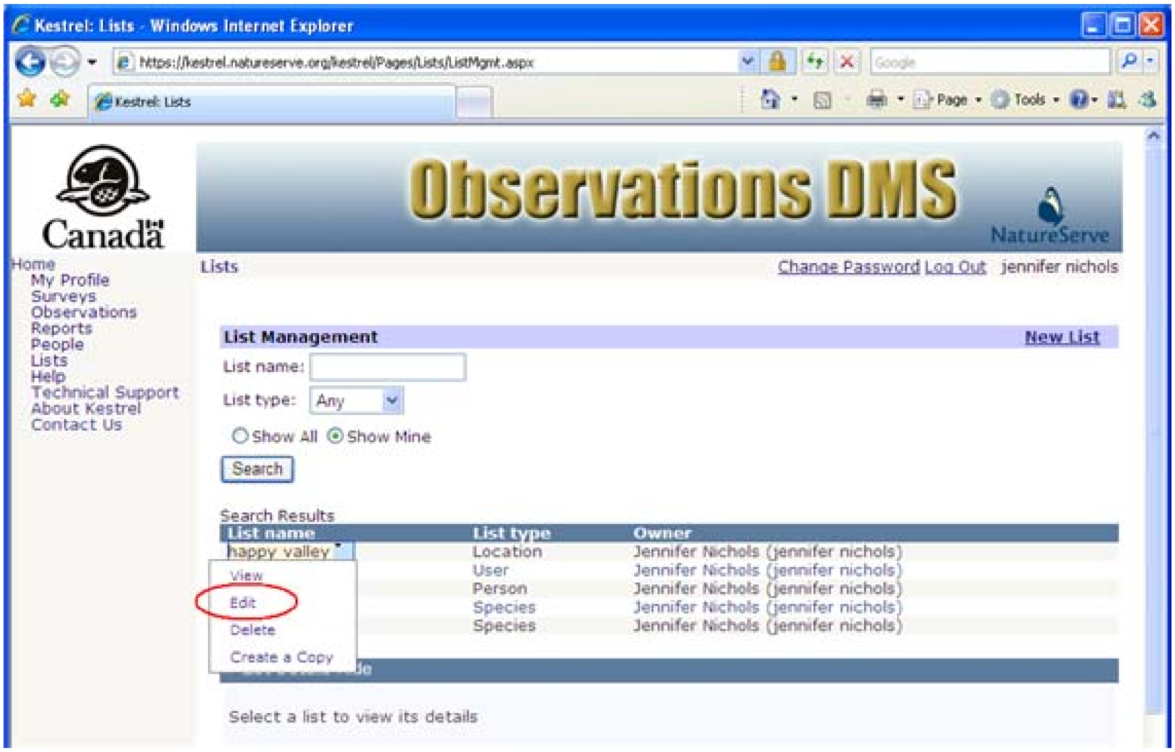
View List

1. Within the *Lists* page, click on the desired list and select View from the dropdown menu.



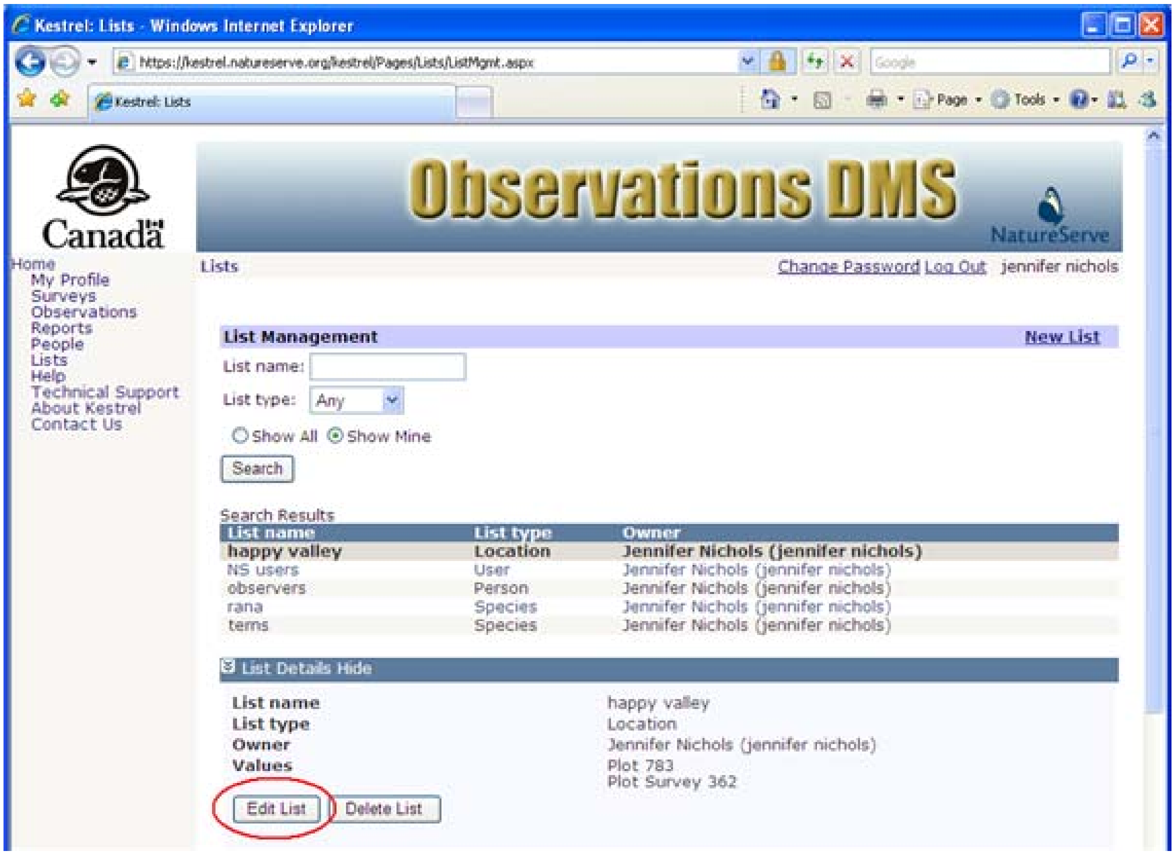
Edit List

1. Within the *Lists* page, click on the list and select Edit from the dropdown menu.



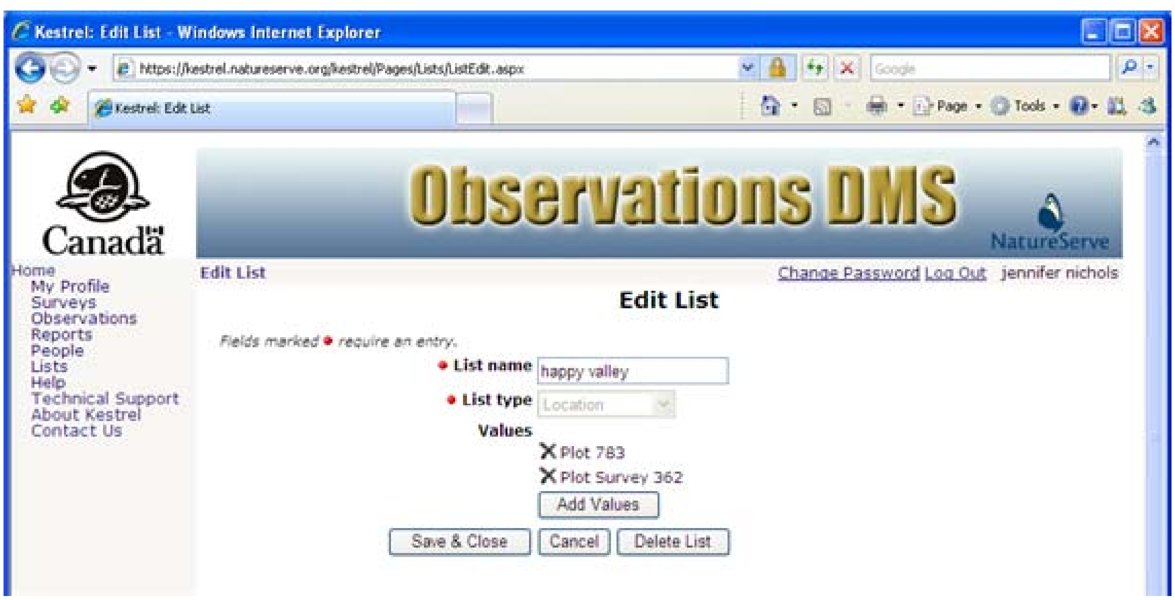
- OR -

Alternatively, if you have already chosen to View the list, within the List Details section select Edit List.

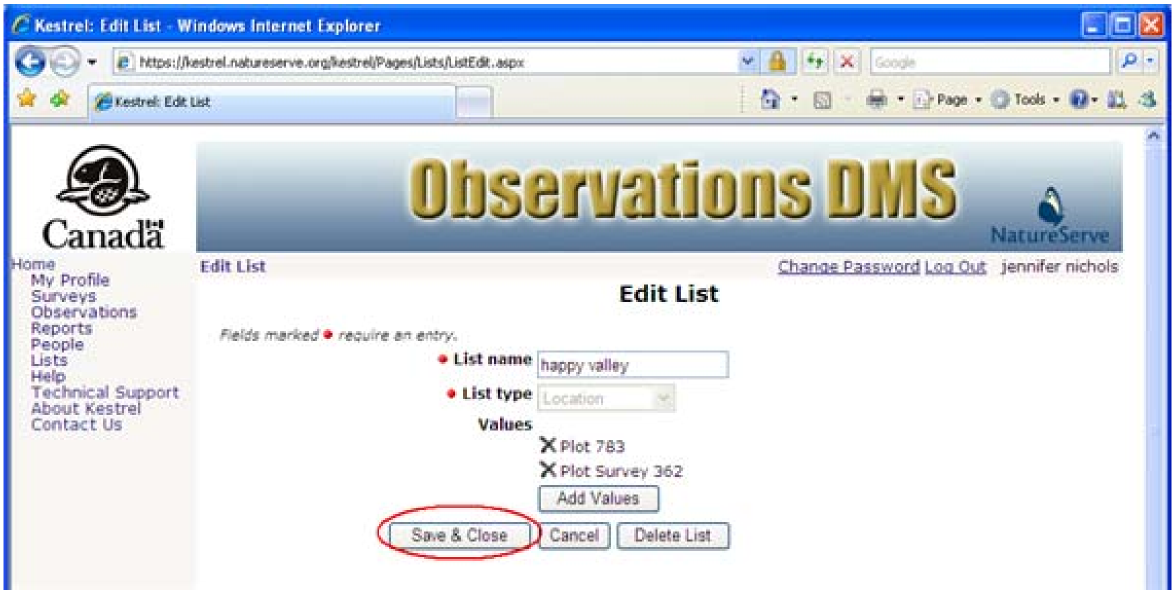


2. Within the *Edit List* page, fill out the various fields with appropriate information. For further information on any of the fields, click the appropriate link below.
   - List Name - Required
   - Values

NOTE: List Type is cannot be edited once a list has been created.



3. **Save & Close** the list.

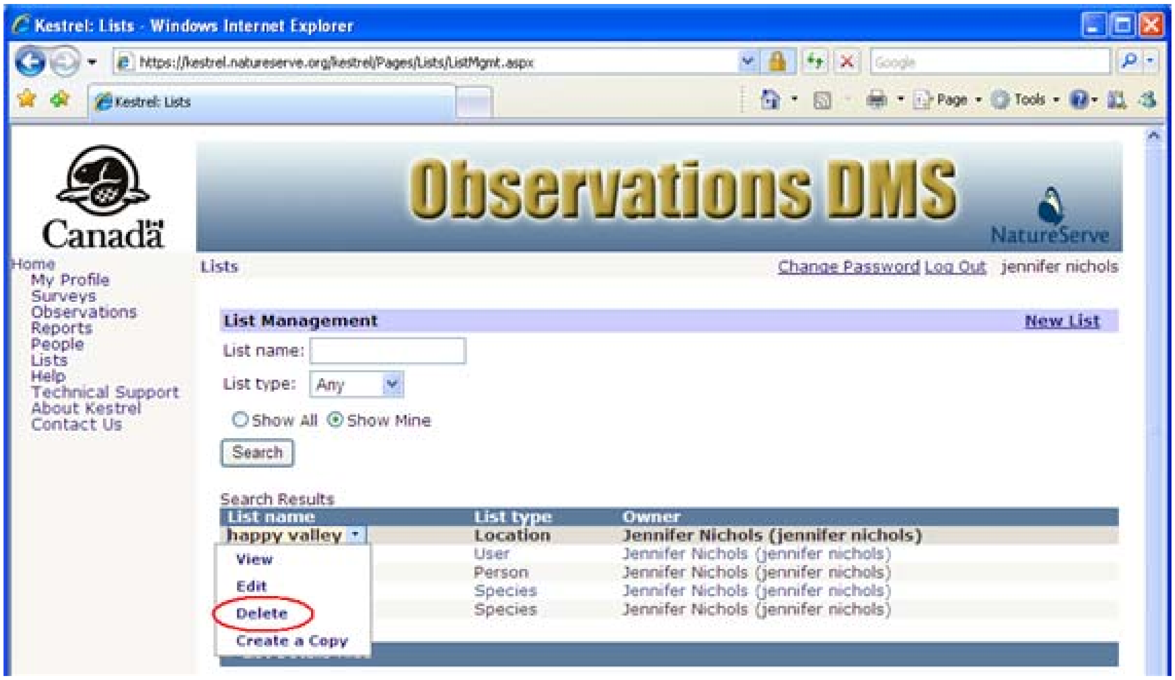


Related Tasks:

- Select Persons
- Select Users
- Select Species
- Select Locations
- Delete List
- View List

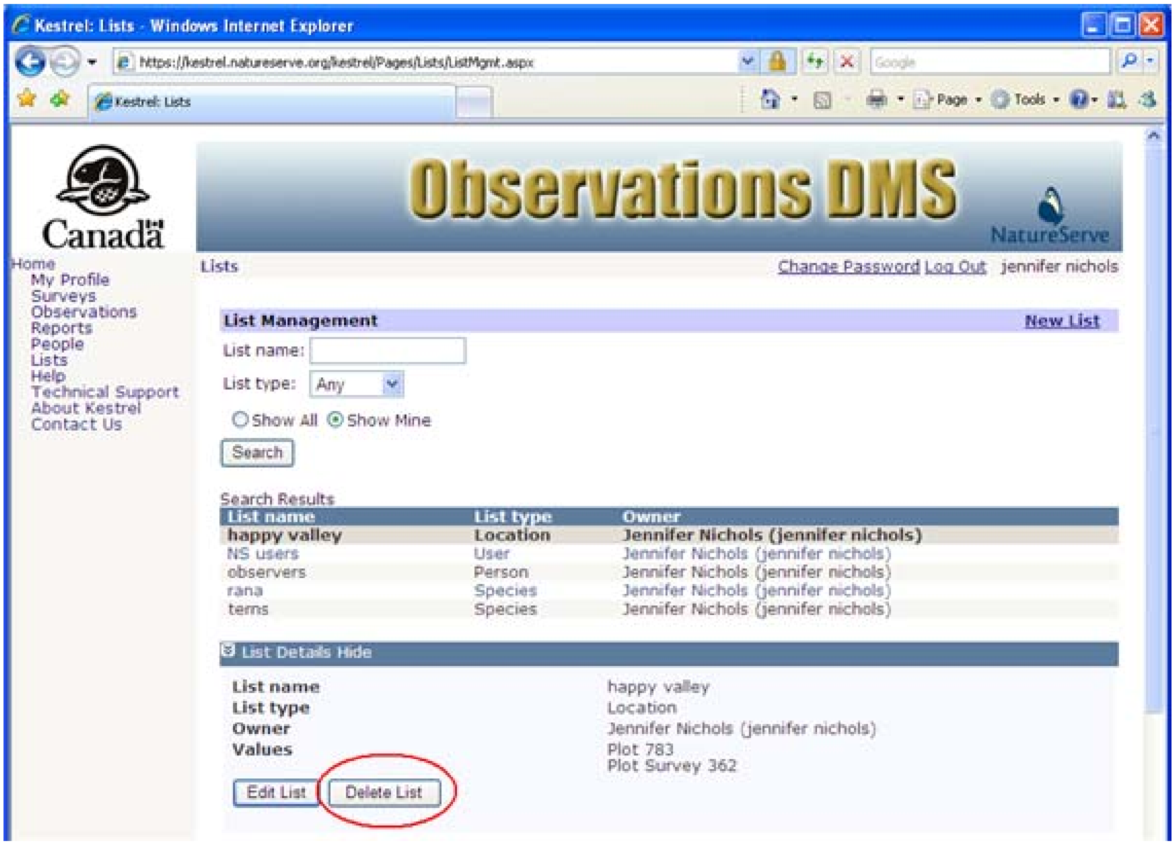
Delete List

1. Within the *Lists* page, click on the list you wish to delete and select Delete from the dropdown list.

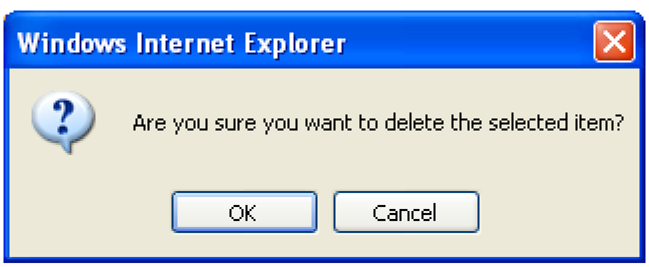


- OR -

Alternatively, if you have already chosen to View the list, within the List Details section select Delete List.

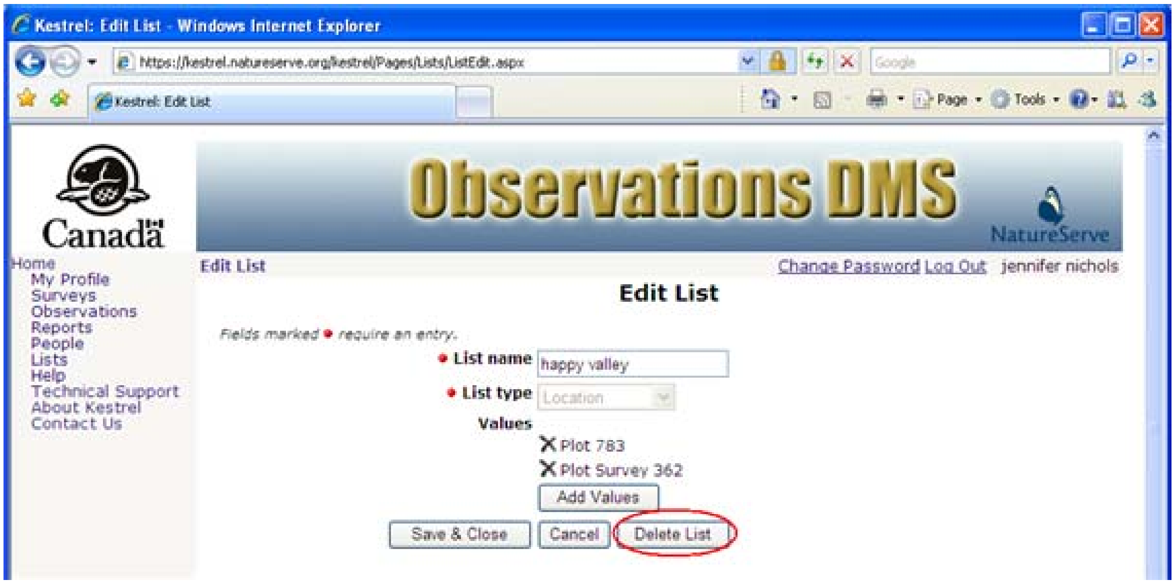


2. You have the option to **CANCEL** the deletion at this point or you can proceed to delete the list by selecting **OK**.

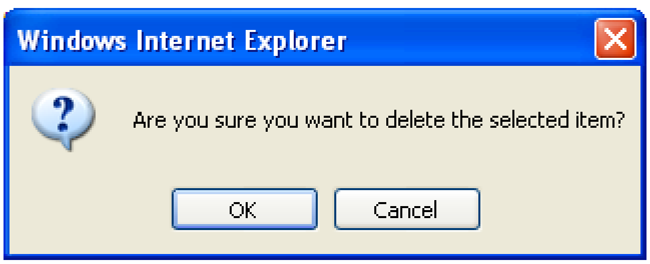


Edit List

1. Within the *Edit List* page, choose Delete List.

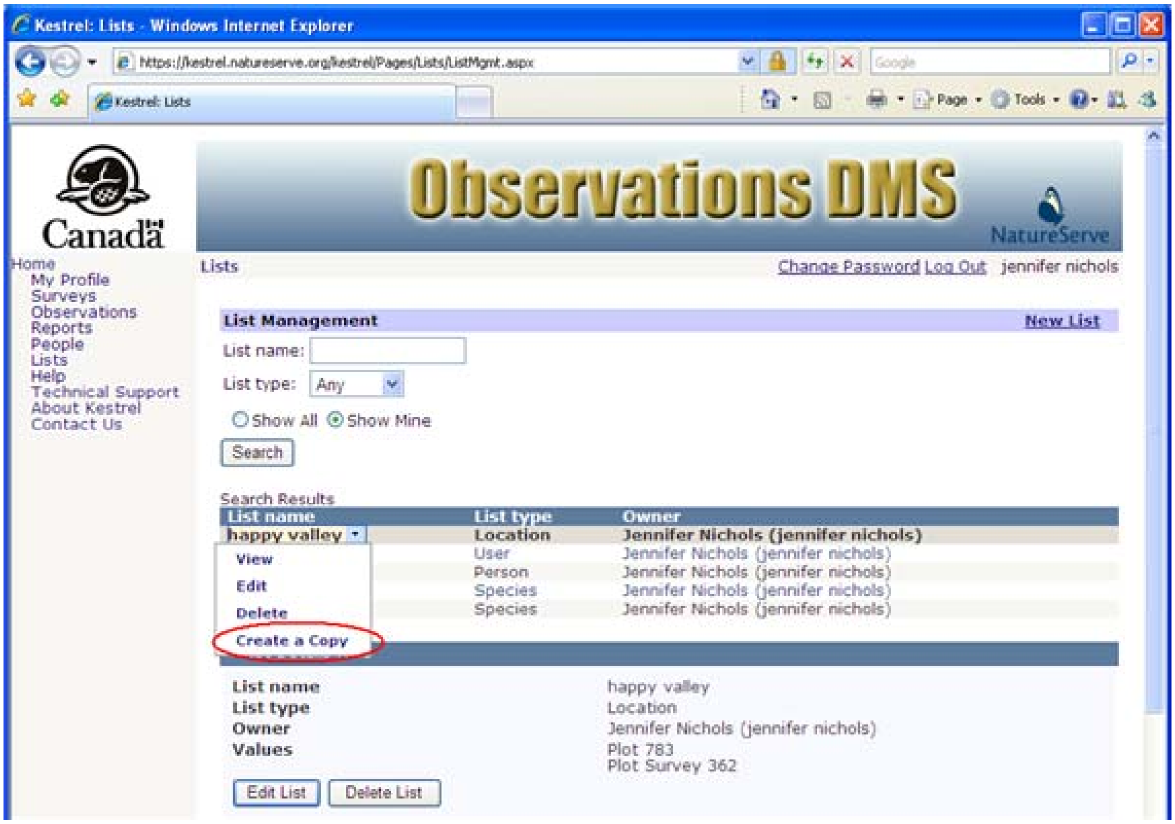


2. You have the option to **CANCEL** the deletion at this point or you can proceed to delete the list by selecting **OK**.

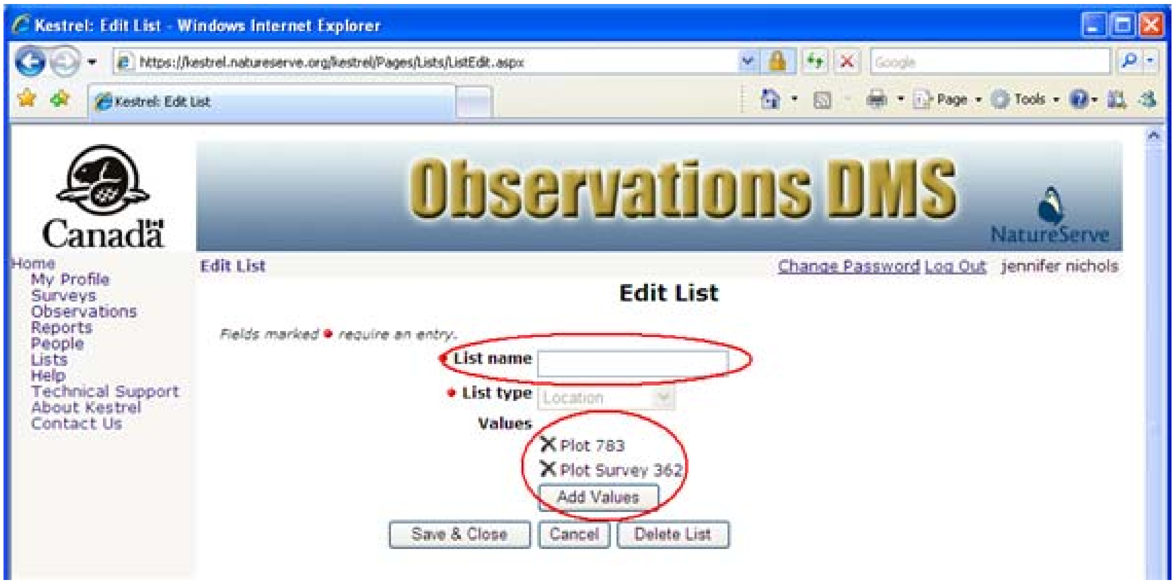


Create a Copy

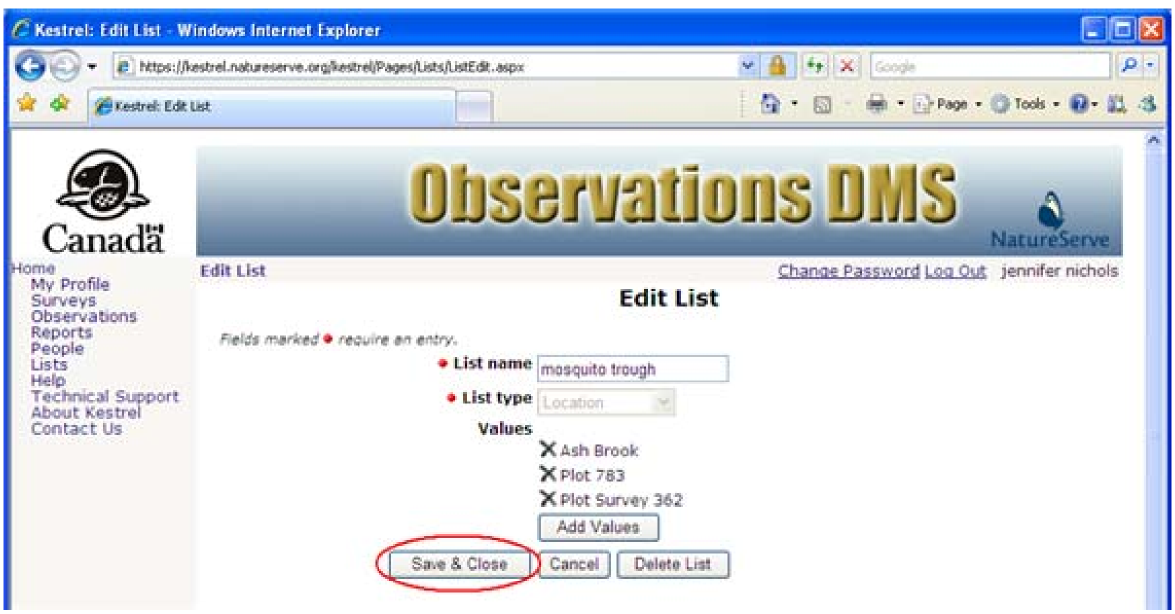
1. Within the *Lists* page, click on the list you wish to copy and select Create a Copy from the dropdown list.



2. Within the *Edit List* page, enter a new name for the copied list, and add/remove values from the copied set as desired.



3. Once any the desired changes have been made to the list copy, click **Save & Close**.



Related Tasks:

- Edit List
- Select Persons
- Select Users
- Select Species
- Select Locations

Reports

Introduction to Reports

Tasks:

- Define Criteria & Generate Report
  - Mapped Location
  - Survey
  - Species
  - Named Location
  - Observation Date
  - Primary Observer
- View Observation
- Edit Observation
- Delete Observation
- View Survey
- Edit Survey
- Delete Survey
- View Person
- Edit Person
- Delete Person
- Modify Criteria
- Clear Criteria
- Export Results
- Import GML to ArcCatalog

Tasks

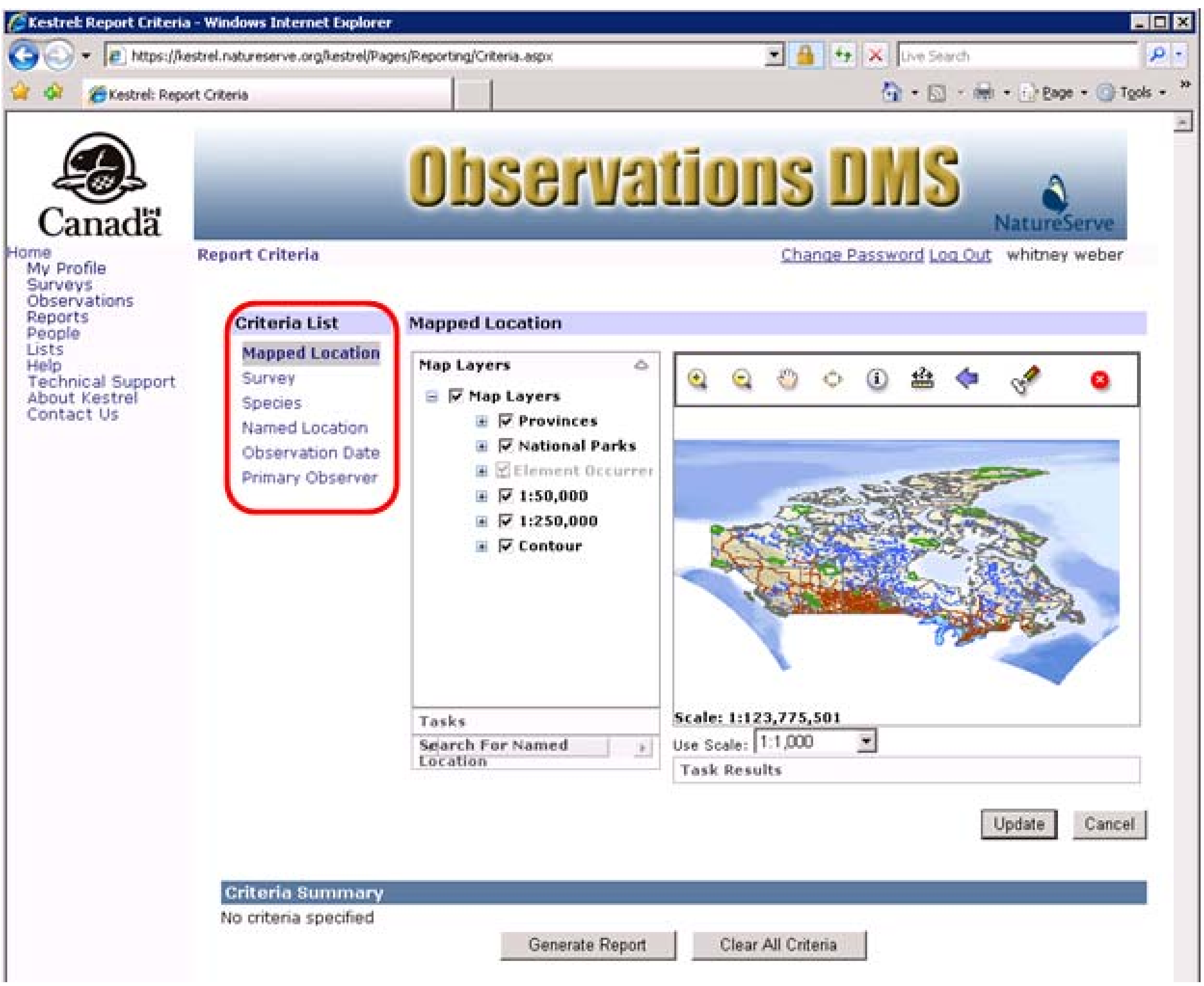
Define Criteria & Generate Report

Define Report Criteria & Generate Report

To generate a report, criteria must be defined on which the report will be generated. Criteria can be defined according to any single criteria variable listed below, or a combination of the criteria. Click on the links below for details on how to define criteria based on the criteria variables.

- Mapped Location
- Survey
- Species
- Named Location
- Observation Date
- Primary Observer

The *Reports* page by default opens to the **Mapped Location** criteria. Click on any of the other criteria listed in the Criteria List section.

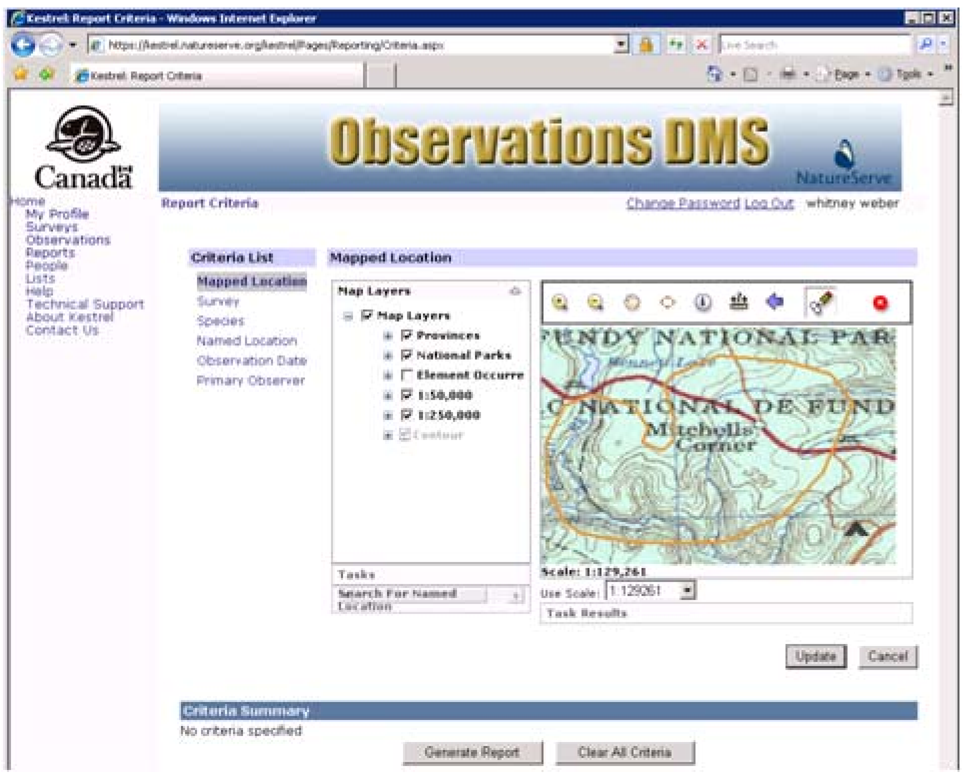


Mapped Location

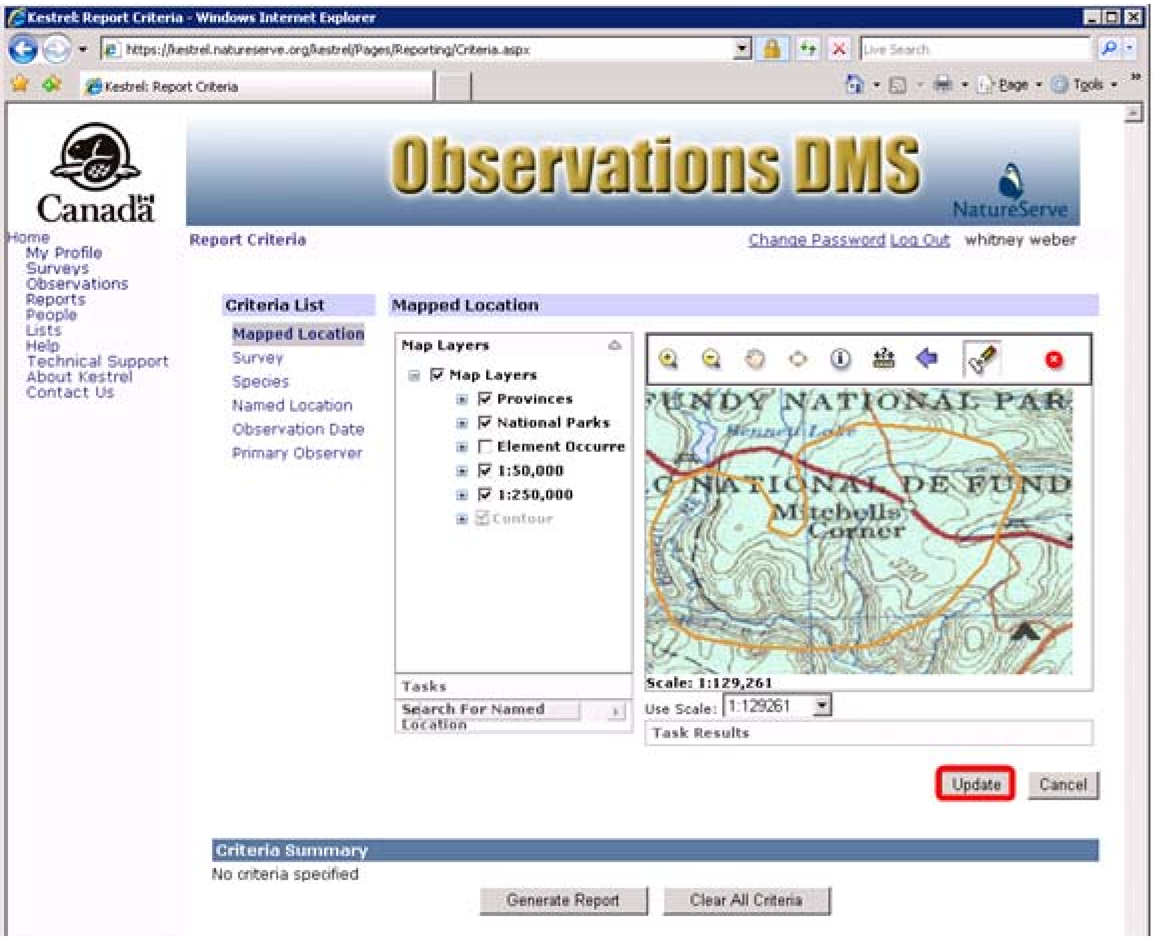
1. Within the *Report Criteria* page, select **Mapped Location** from the Criteria List section, if it is not already selected.
2. Navigate to the desired location using the Mapping Tools.
3. Define the mapped location using one of the three following options:
    - Draw the location:

        a. Select the Draw Polygon  tool.

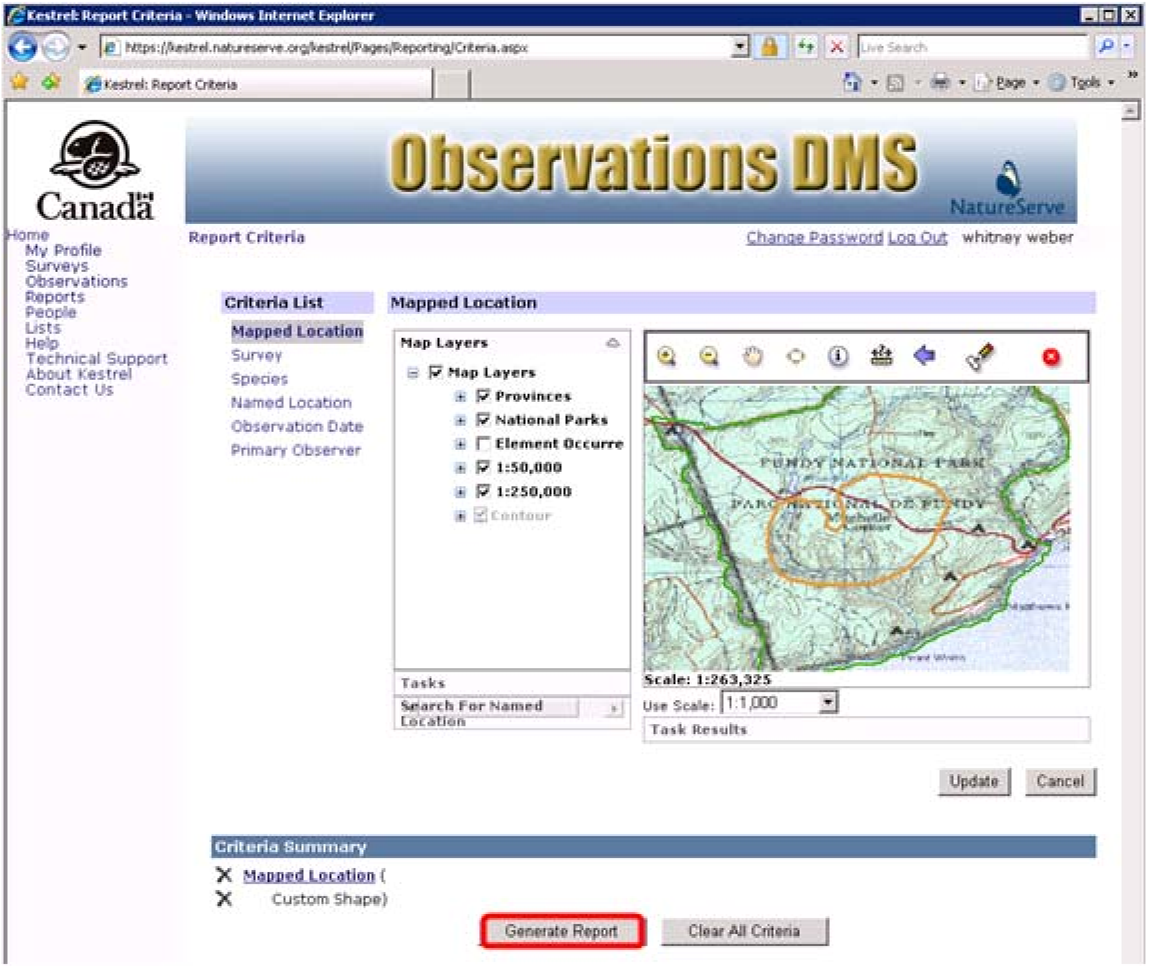
        b. Draw the polygon by using a single click to place each vertex and double-click to finish the polygon.



    - Select the location using one of the Select Tasks.
    - Build a query to select the location using the Query Builder task.
4. After defining the search area, click **Update** to add the area to the Criteria Summary section.



5. If this is the only criteria to be considered in creating the report, click **Generate Report**. If you would like to add additional criteria, do so at this time, prior to selecting **Generate Report**.

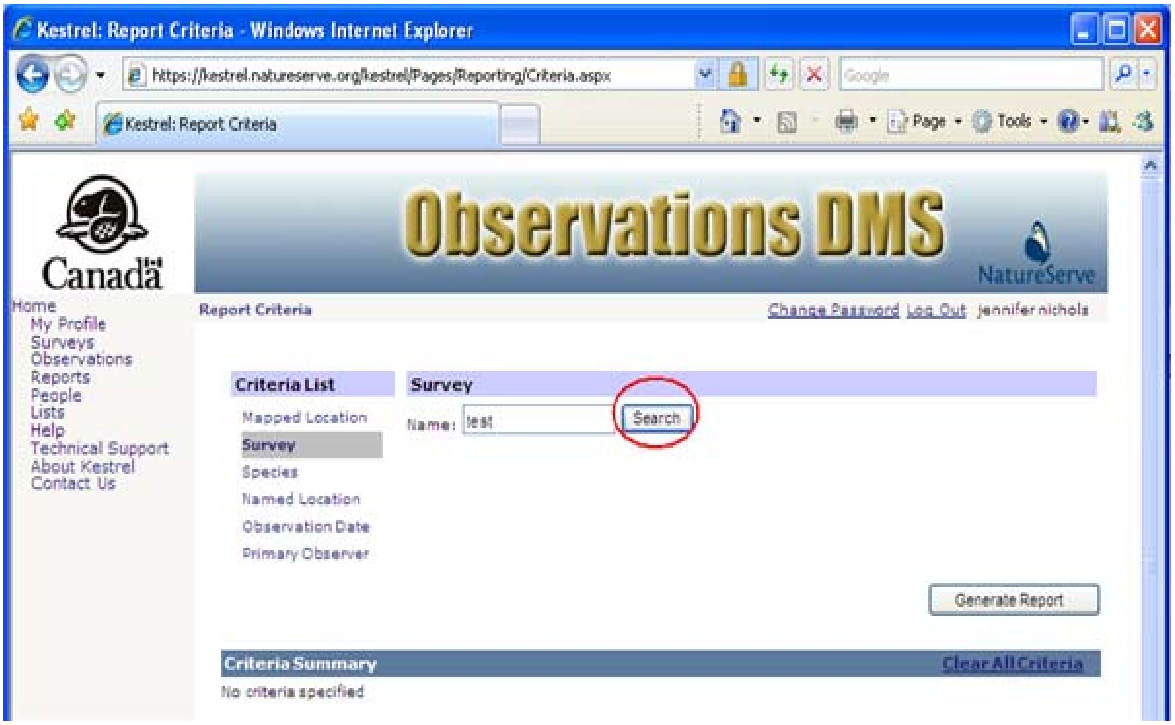


Related Tasks:

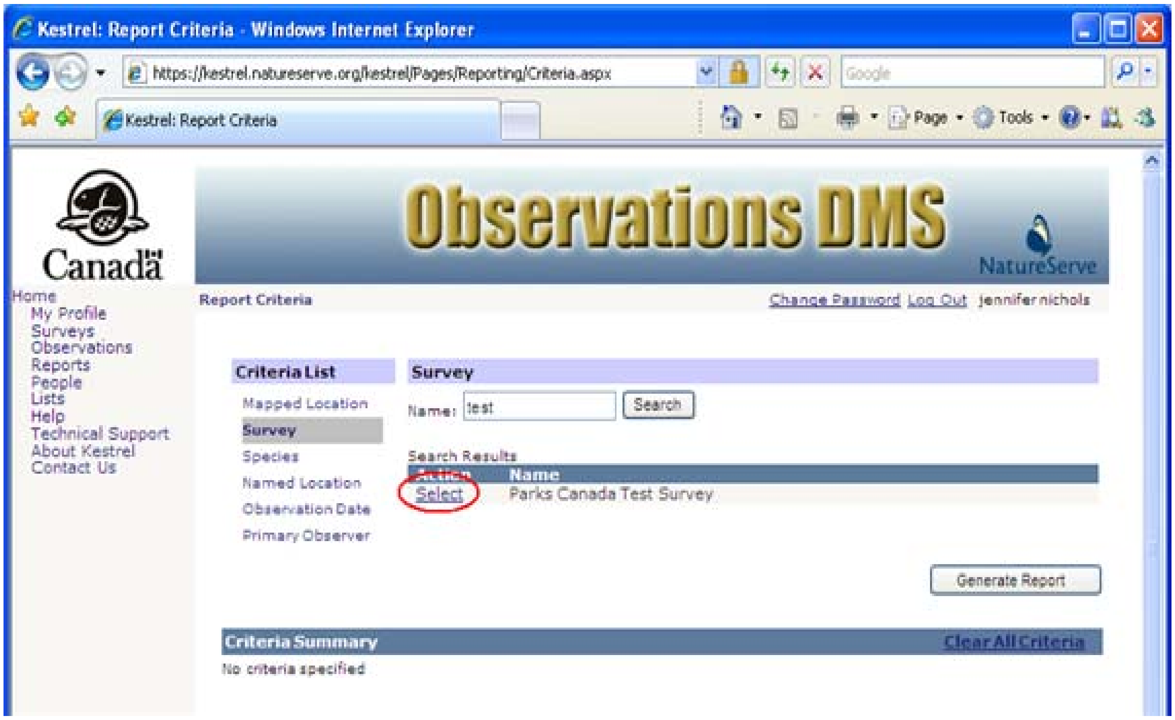
- Select Tasks
- Query Builder
- Clear Criteria
- Define Report Criteria according to
  - Survey
  - Species
  - Named Location
  - Observation Date
  - Primary Observer

Survey

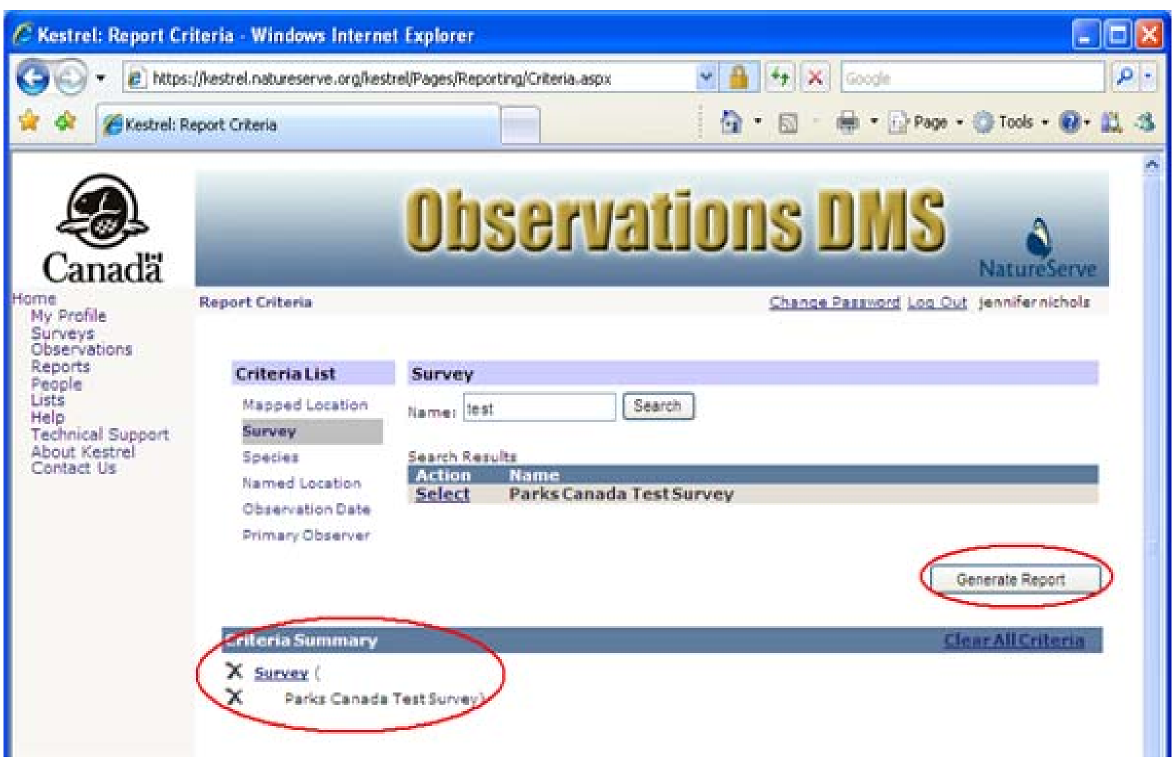
1. Within the *Report Criteria* page, select **Survey** from the Criteria List section.
2. Type in any part of the survey name, and choose **Search**. The more specific the search criteria, the faster the search.



3. **Select** the appropriate Survey from the results list, which will add it to the Criteria Summary section.



4. If this is the only criteria to be considered in creating the report, click **Generate Report**. If you would like to add additional criteria, do so at this time, prior to selecting **Generate Report**.



Related Tasks:

- Clear Criteria
- Define Report Criteria according to
  - Mapped Location
  - Species
  - Named Location
  - Observation Date
  - Primary Observer

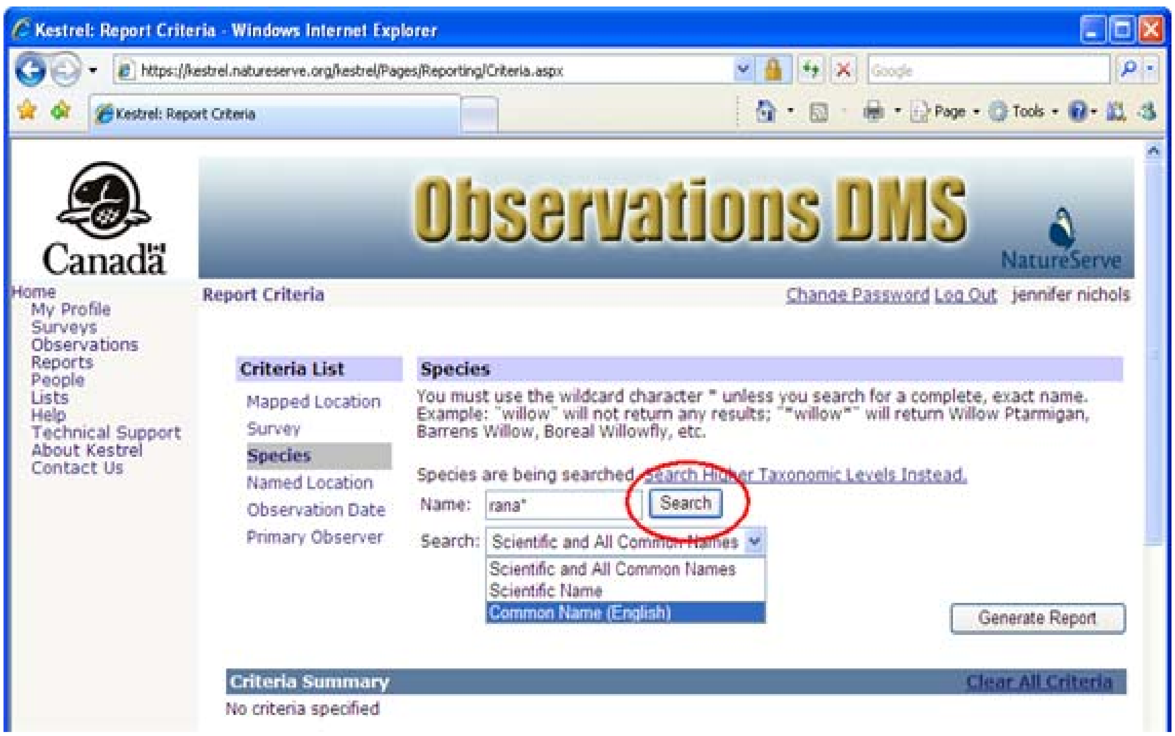
Species

1. Within the *Report Criteria* page, select **Species** from the Criteria List section.
2. A species can be searched in one of two ways:
    - Use common or scientific name (at the genus and species level)
    - Use higher taxonomic levels

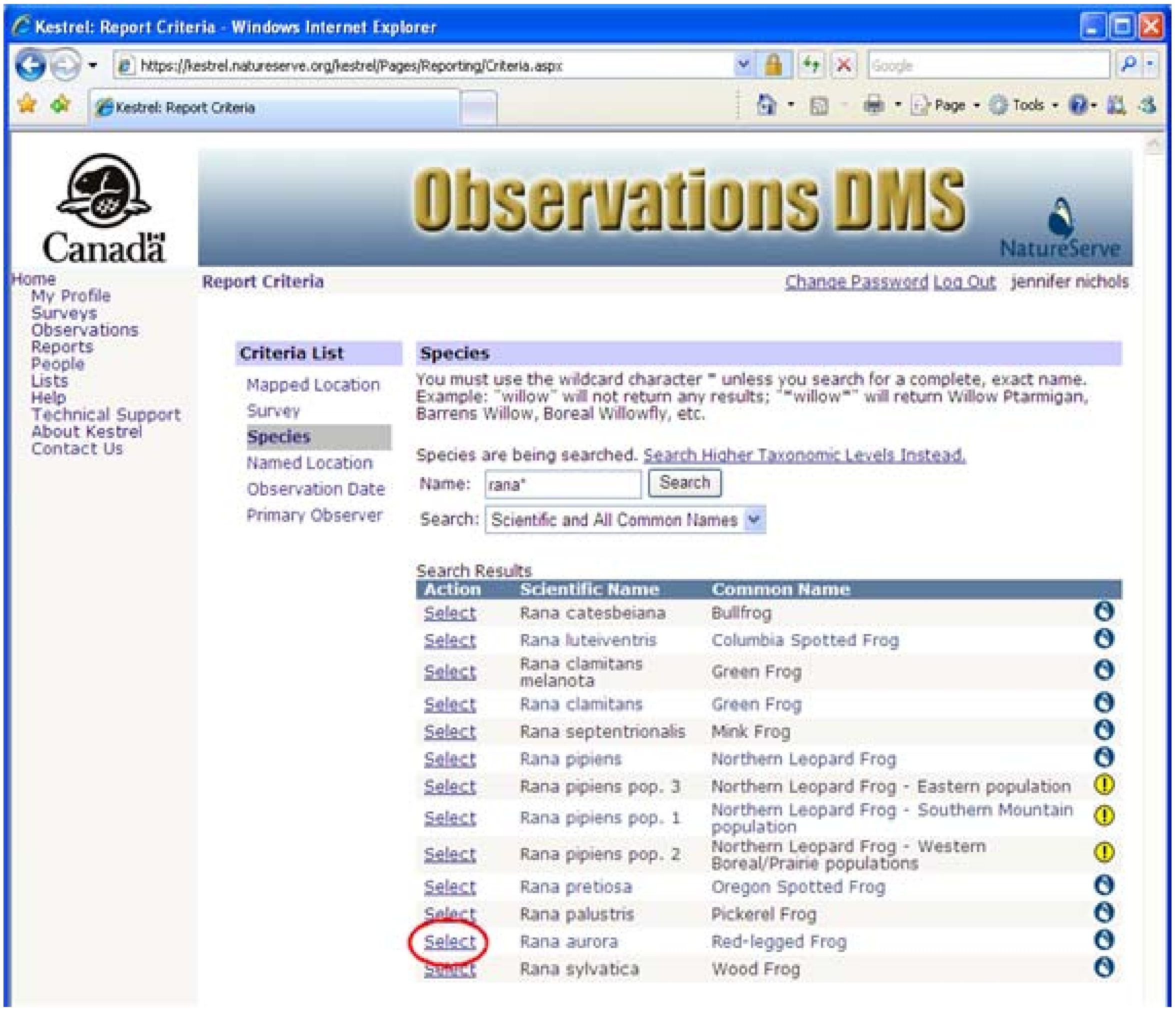
Use common or scientific name

1. Within the *Select a Species* page, type in all or part of the scientific or common name and specify which you will be searching on by selecting the appropriate value from the Search dropdown list. Click **Search**.

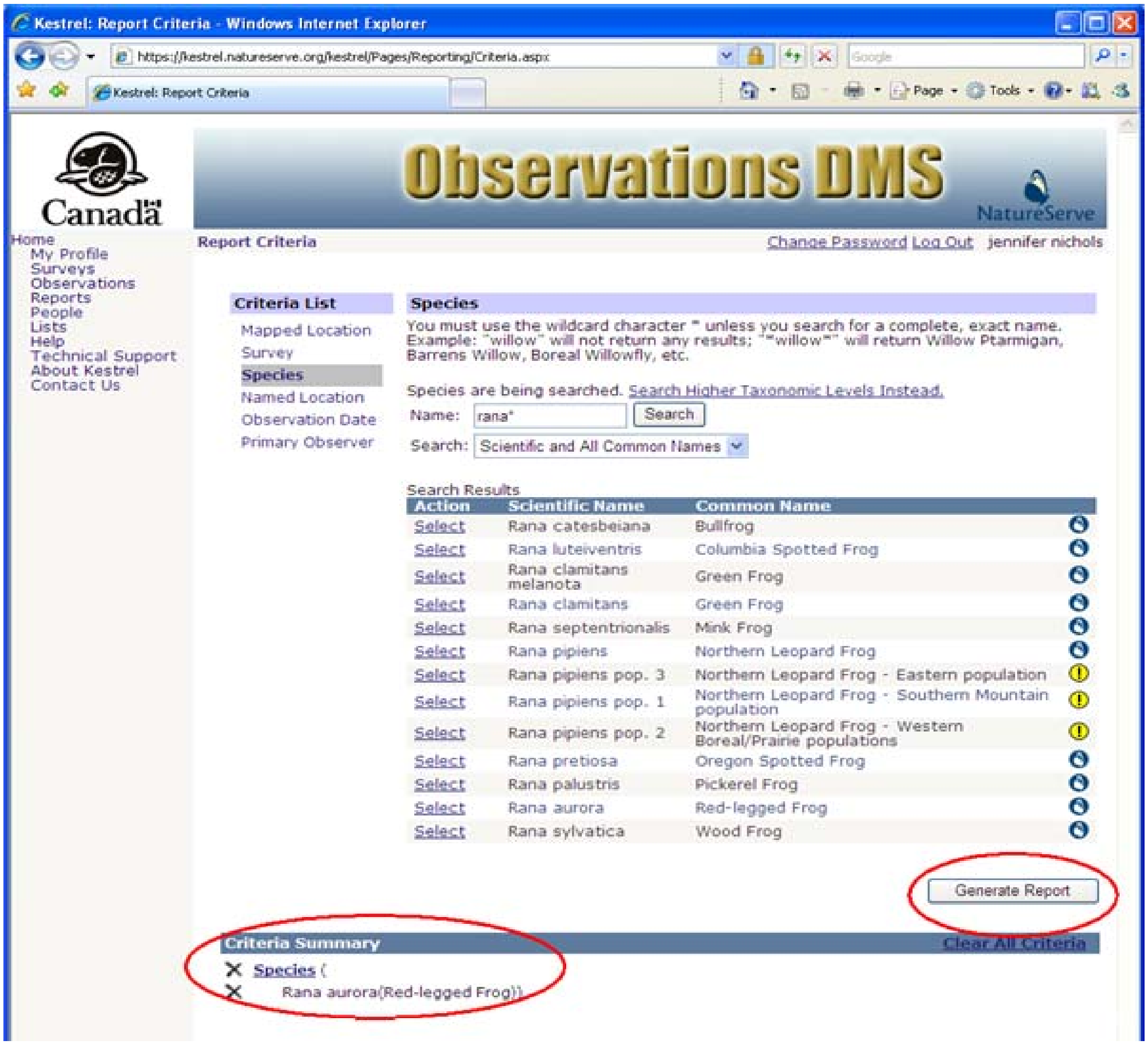
   NOTE: Use * as the wildcard indicator. (i.e., rana* will return *Rana aurora*, *Rana pipiens*,...)



2. **Select** the appropriate species from the list, which will add it to the Criteria Summary section.

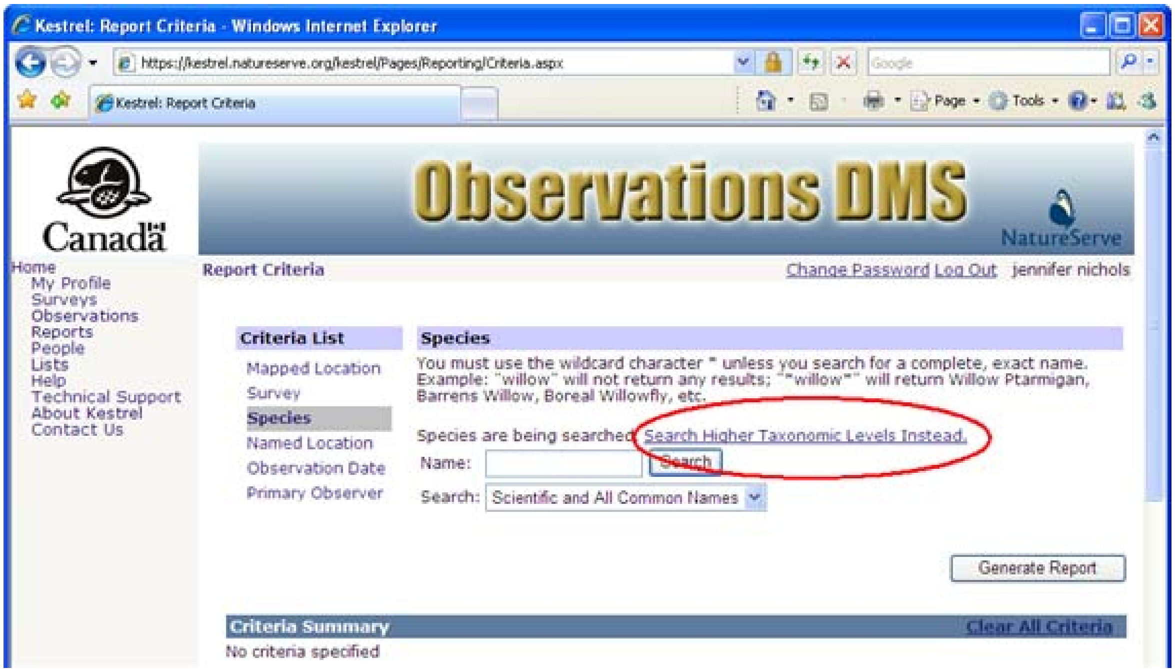


3. If this is the only criteria to be considered in creating the report, click **Generate Report**. If you would like to add additional criteria, do so at this time, prior to selecting **Generate Report**.



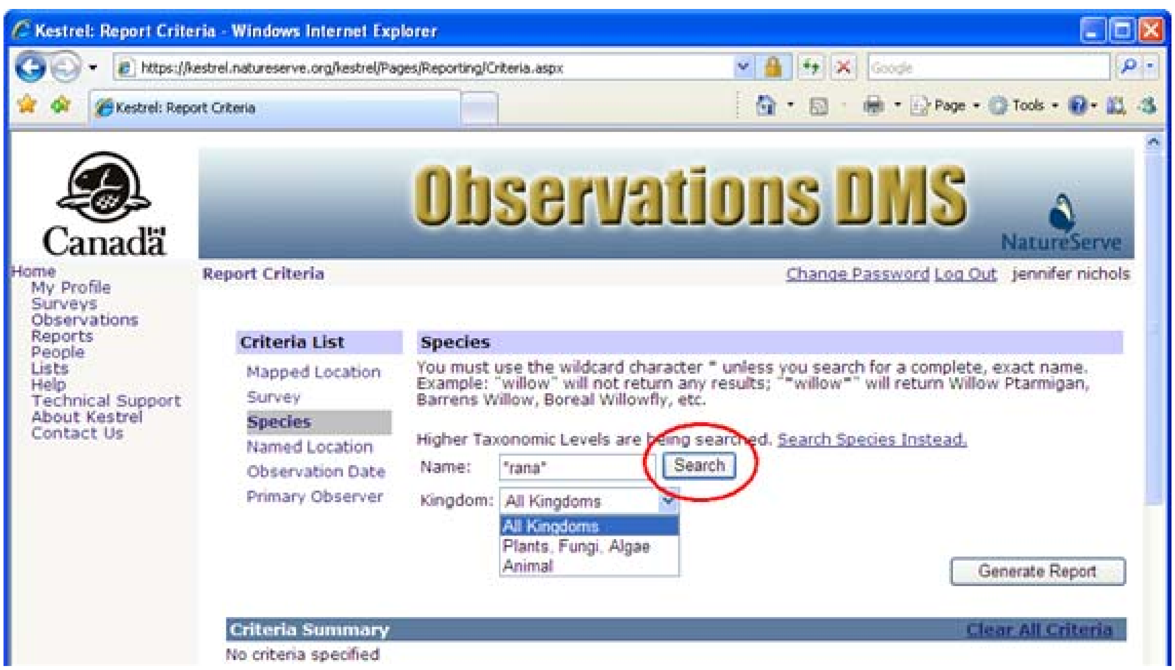
Use higher taxonomic levels

1. Within the *Select a Species* page, click on **Search Higher Taxonomic Levels Instead**.

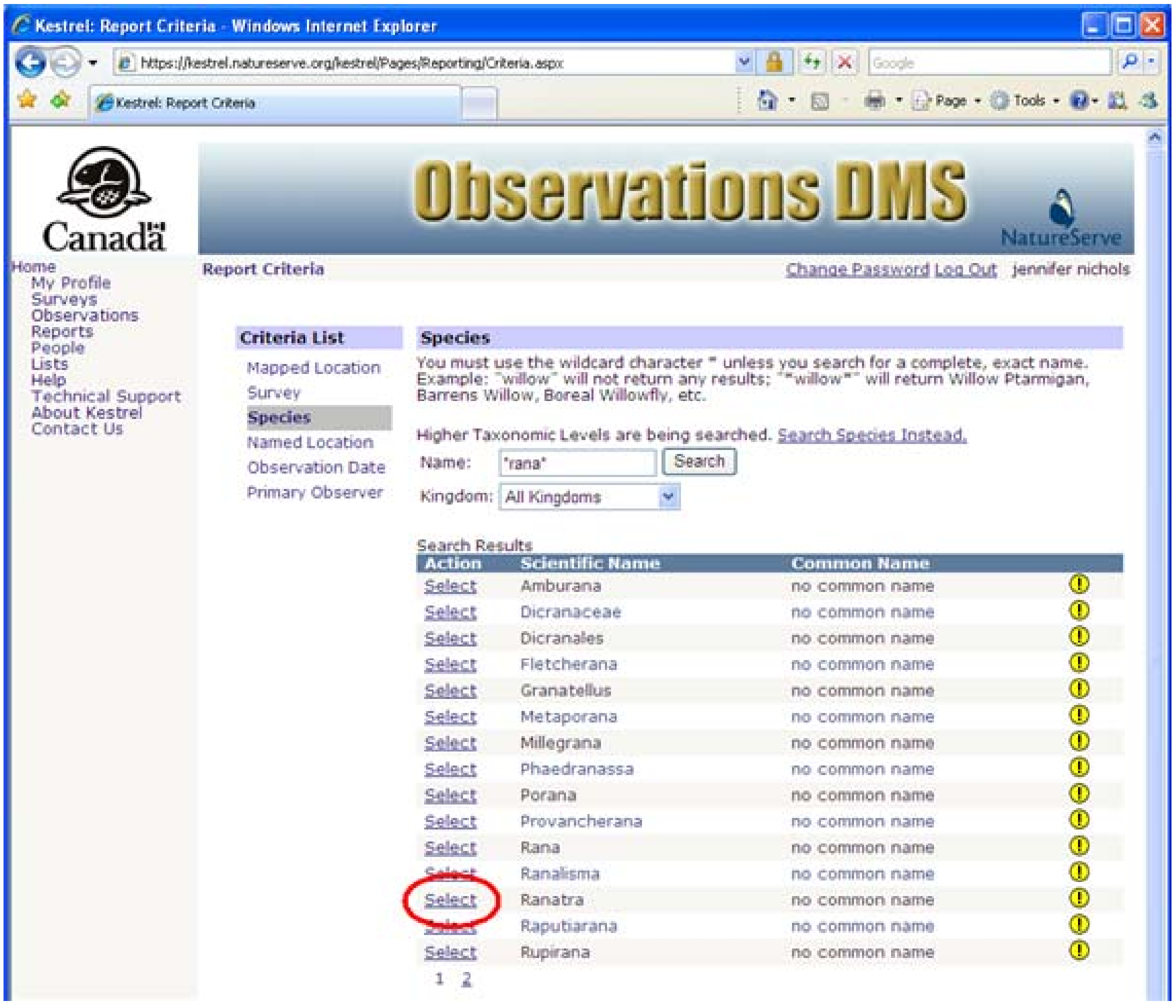


2. Type in the part of the scientific name and specify which taxonomy you will be searching on by selecting the appropriate value from the Search dropdown list. Click **Search**.

NOTE: Use * as the wildcard indicator. (i.e., *rana* will return Amburana, Dicranaceae, Dicranales&ldots;)



3. Select the appropriate name from the list, which will add it to the Criteria Summary section.



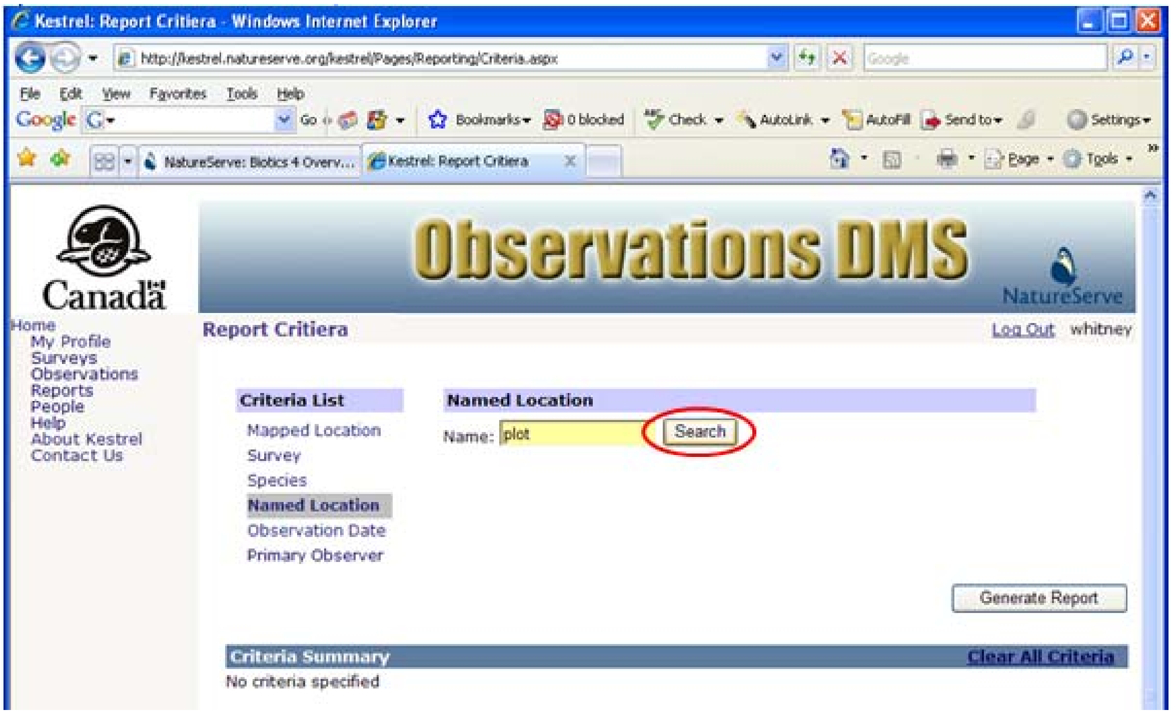
4. If this is the only criteria to be considered in creating the report, click **Generate Report**. If you would like to add additional criteria, do so at this time, prior to selecting **Generate Report**.

Related Tasks:

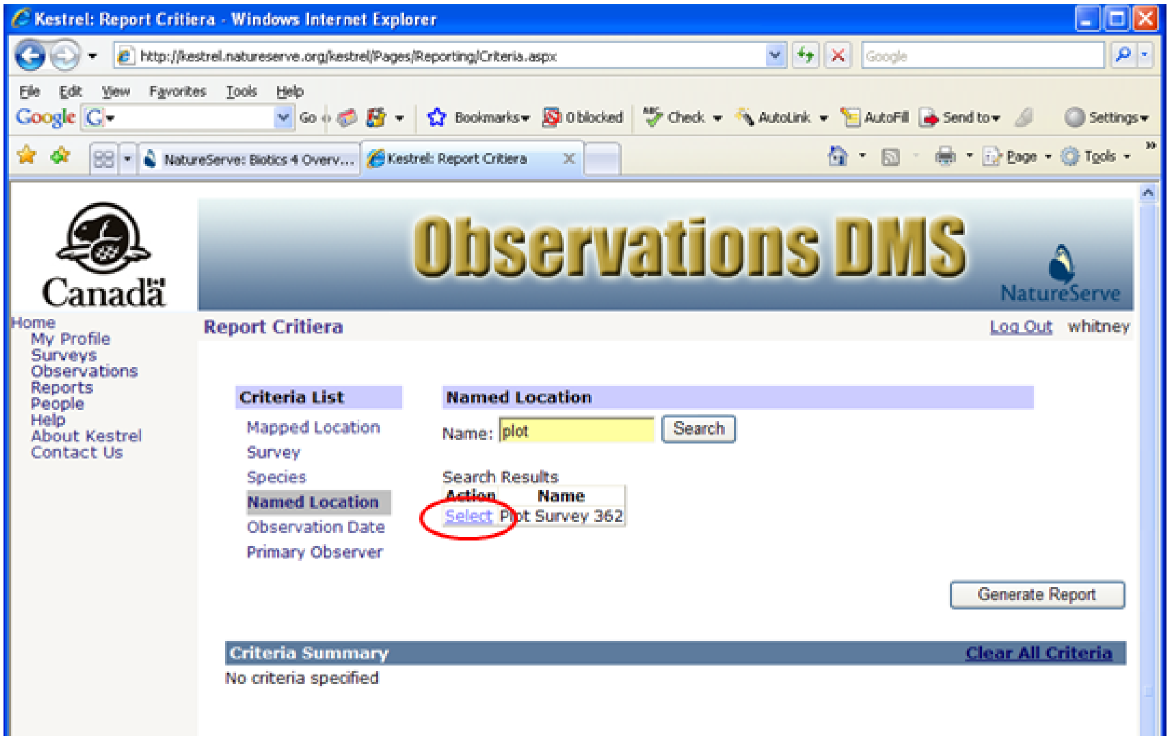
- [Clear Criteria]
- Define Report Criteria according to
  - o Mapped Location
  - o Survey
  - o Named Location
  - o Observation Date
  - o Primary Observer

Named Location

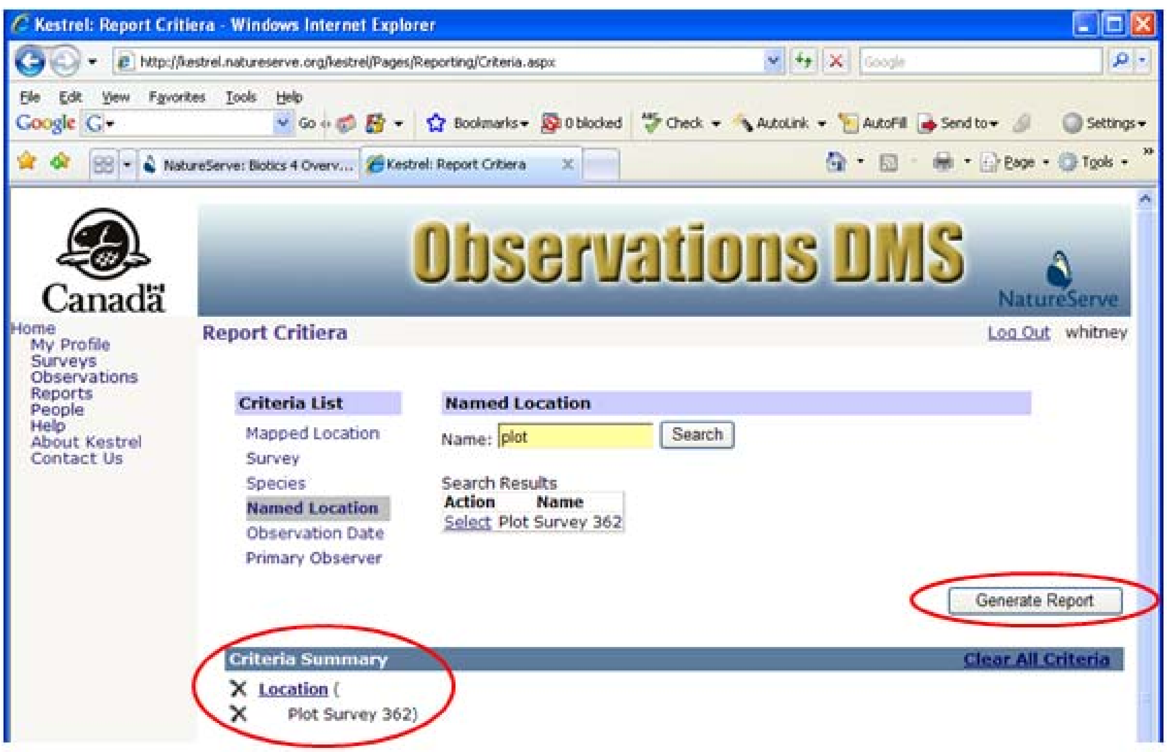
1. Within the *Report Criteria* page, select **Named Location** from the Criteria List section.
2. Type in any part of the named location, and choose **Search**. The more specific the search criteria, the faster the search.



3. **Select** the appropriate Named Location from the list, which will add it to the Criteria Summary section.



4. If this is the only criteria to be considered in creating the report, click **Generate Report**. If you would like to add additional criteria, do so at this time, prior to selecting **Generate Report**.

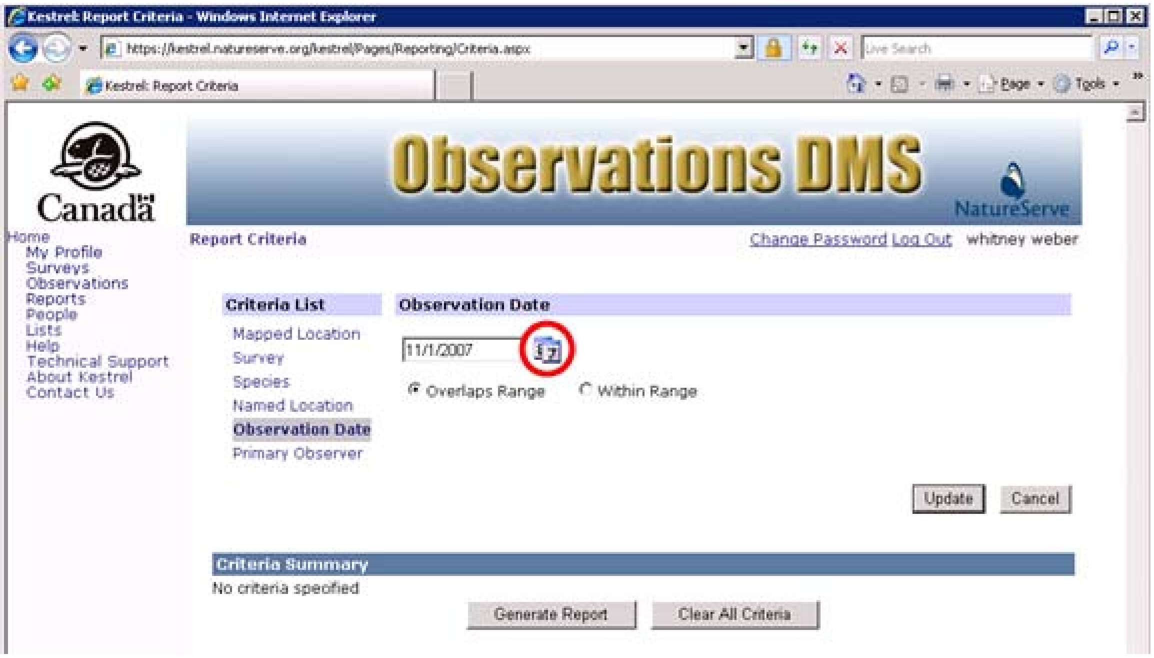


Related Tasks:

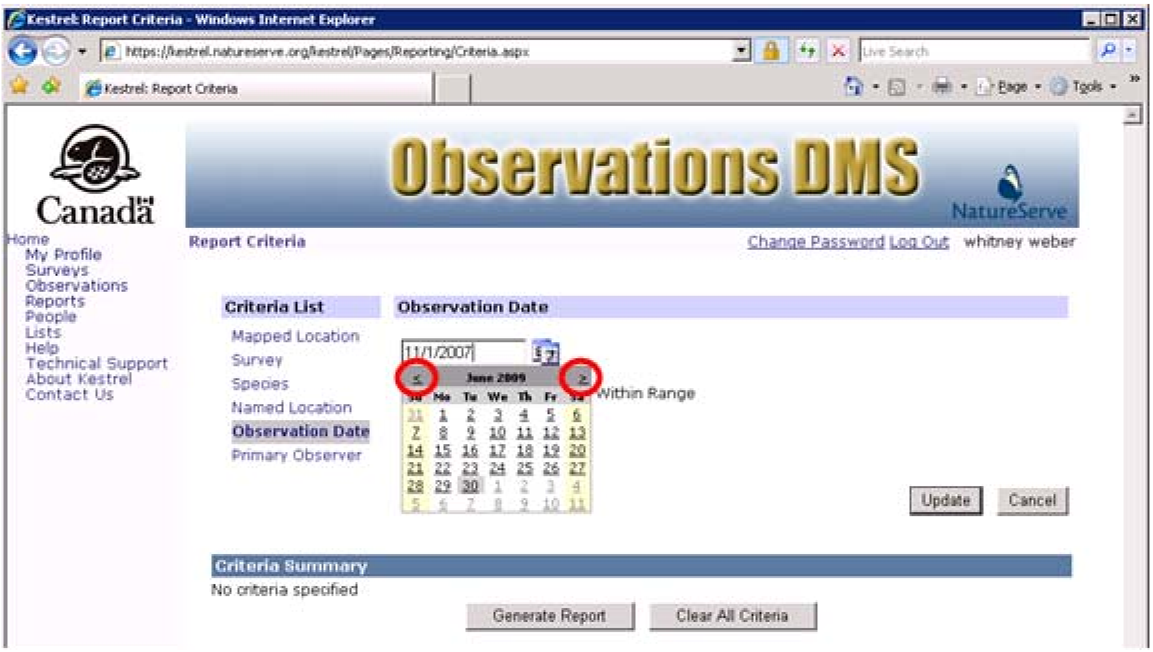
- Clear Criteria
- Define Report Criteria according to
    - Mapped Location
    - Survey
    - Species
    - Observation Date
    - Primary Observer

Observation Date

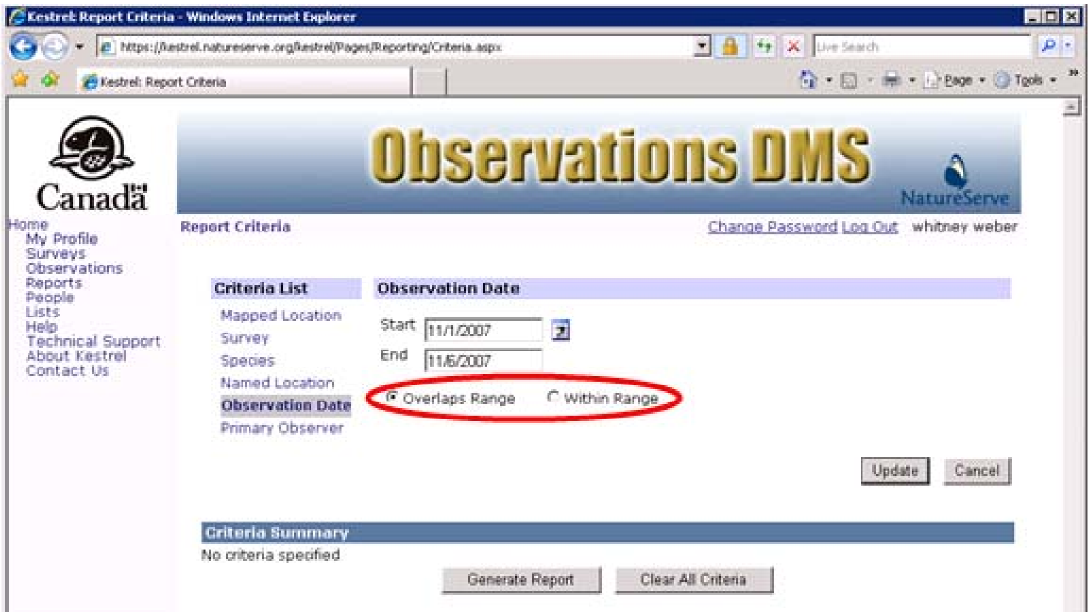
1. Within the *Report Criteria* page, select **Observation Date** from the Criteria List section.
2. The observation date criteria can be defined by a single date or a date range. To indicate a date range, click the icon, which will allow you to specify the start and end date of the date range. To return to a single date, click the icon.



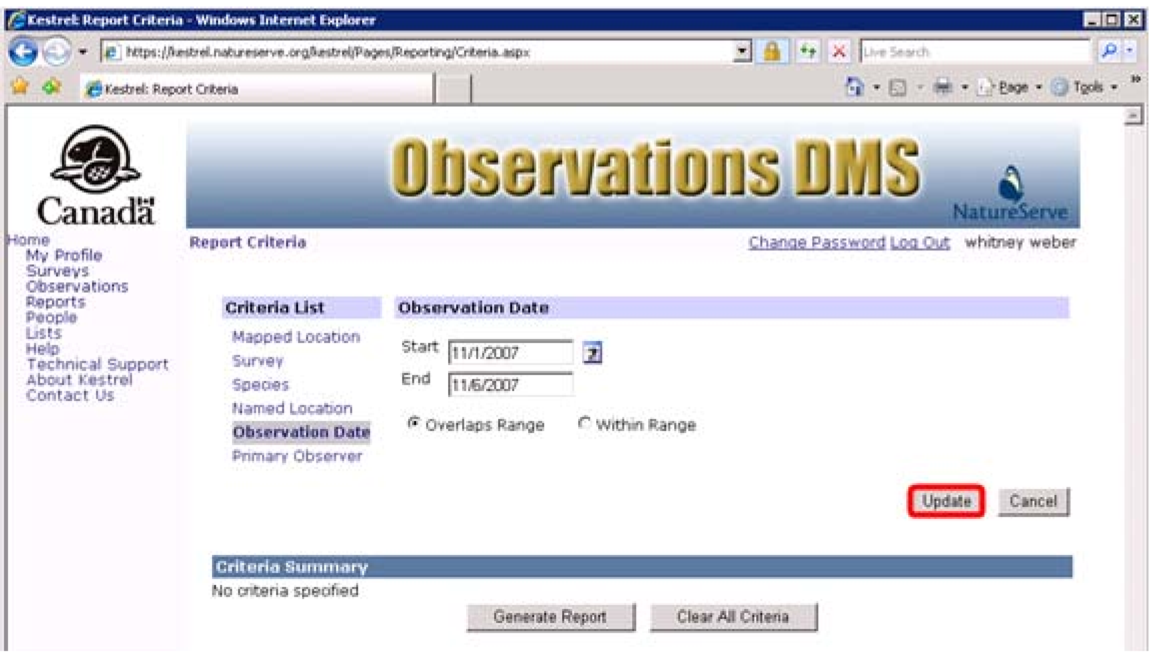
3. Click within the date textbox to either manually enter the desired date or to select the date from the calendar that appears when the field is clicked. Both the textbox and the calendar initialize to the current date. Click the ≤ icon on the calendar to navigate to the previous month or the ≥ icon to navigate to the next month.



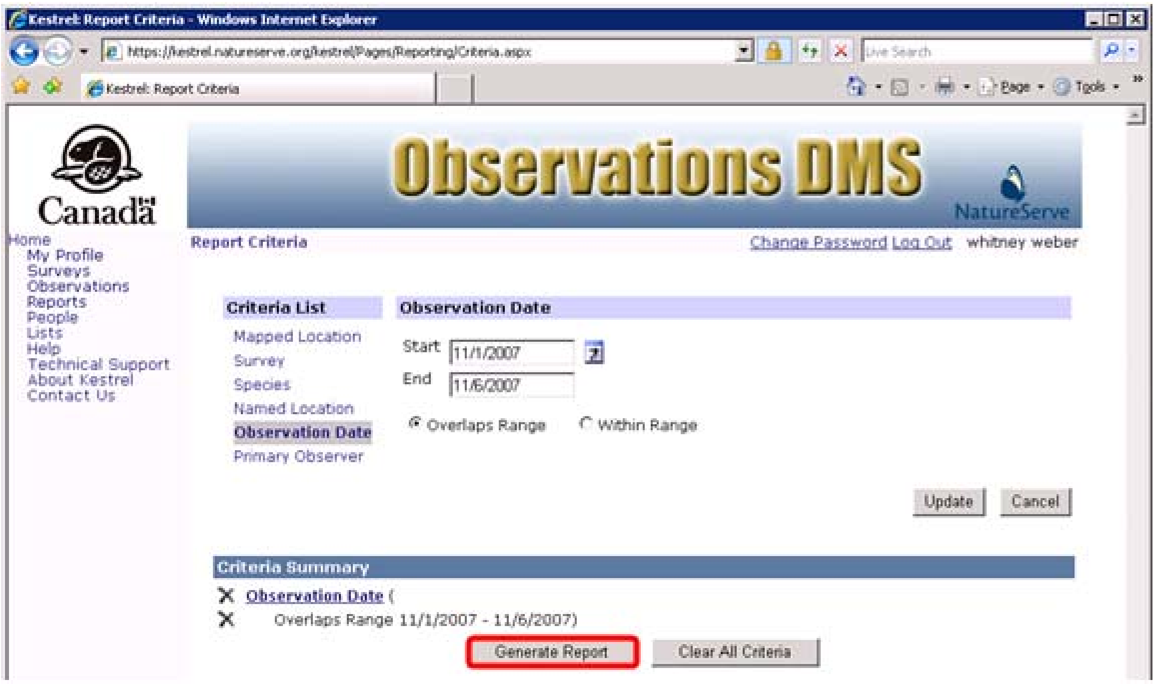
4. If you have entered a date range, use the radio buttons to indicate whether you want your search to return results in which the observation date range **Overlaps** the **Range** or is **Within** the **Range** of the dates specified.
   - **Overlaps Range**: if the dates specified within the search criteria are May 3 - 7 and the observation dates of a record are May 2 - 5, this record will be returned within the report because the observation date overlaps the date of the search criteria. The search will also return observations with a single date between May 3 and May 7, instead of a date range. Overlaps Range is the default setting.
   - **Within Range**: if the dates specified within the search criteria are May 3 - 7 and the observation date of a record are May 2 - 5, this record will NOT be returned within the report because the observation date is NOT WITHIN the date of the search criteria. The search will return observations with a single date between May 3 and May 7, instead of a date range, as well as those records with a date range completely contained within the range in the criteria (e.g., May 4 &endash; 5).



5. After defining the observation date(s) and search type, click **Update** to add the observation date as a search critera within the Criteria Summary section.



6. If this is the only criteria to be considered in creating the report, click **Generate Report**. If you would like to add additional criteria, do so at this time, prior to selecting **Generate Report**.

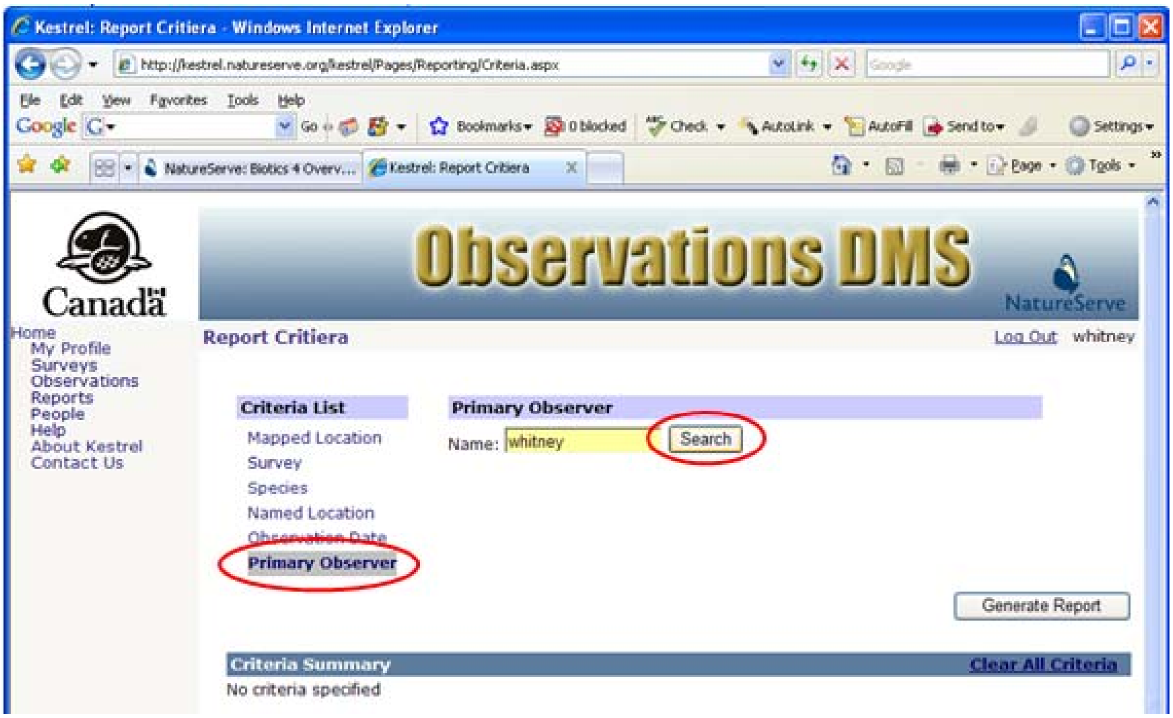


Related Tasks:

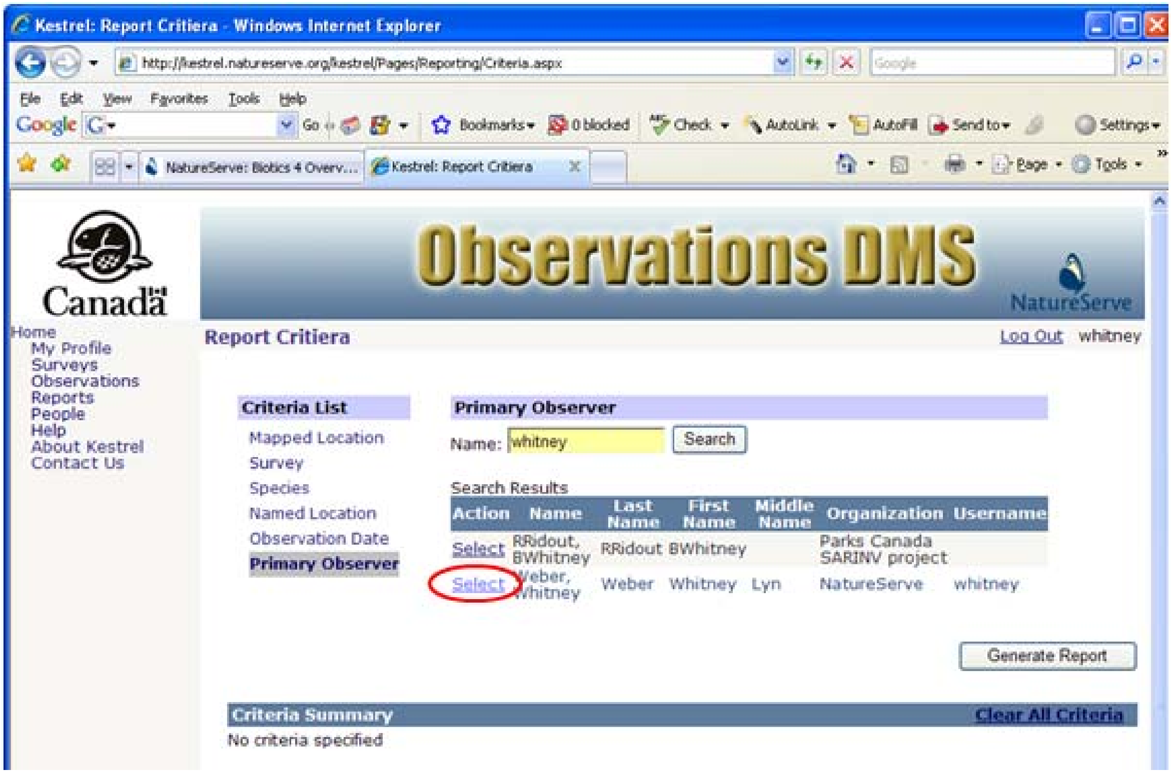
- Clear Criteria
- Define Report Criteria according to
  - Mapped Location
  - Species
  - Survey
  - Named Location
  - Primary Observer

Primary Observer

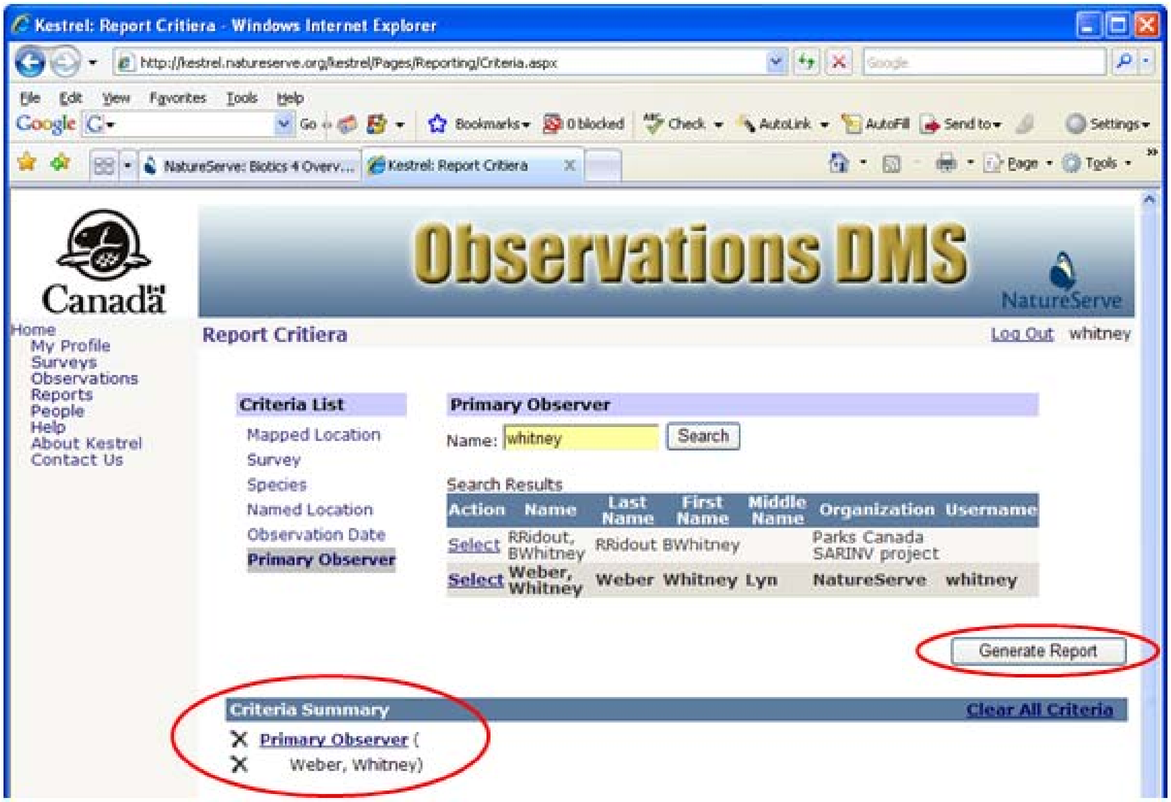
1. Within the *Report Criteria* page, select **Primary Observer** from the Criteria List section.
2. Type in any part of the first or last name, and choose **Search**. For example, a search for 'web' would return anyone with 'web' anywhere within the name. The more specific the search criteria, the faster the search. However, if you search for a complete name, you must enter it as "Last Name, First Name", and the spelling and punctuation must match the Person record precisely.



3. **Select** the appropriate Primary Observer from the list, which will add it to the Criteria Summary section.



4. If this is the only criteria to be considered in creating the report, click **Generate Report**. If you would like to add additional criteria, do so at this time, prior to selecting **Generate Report**.

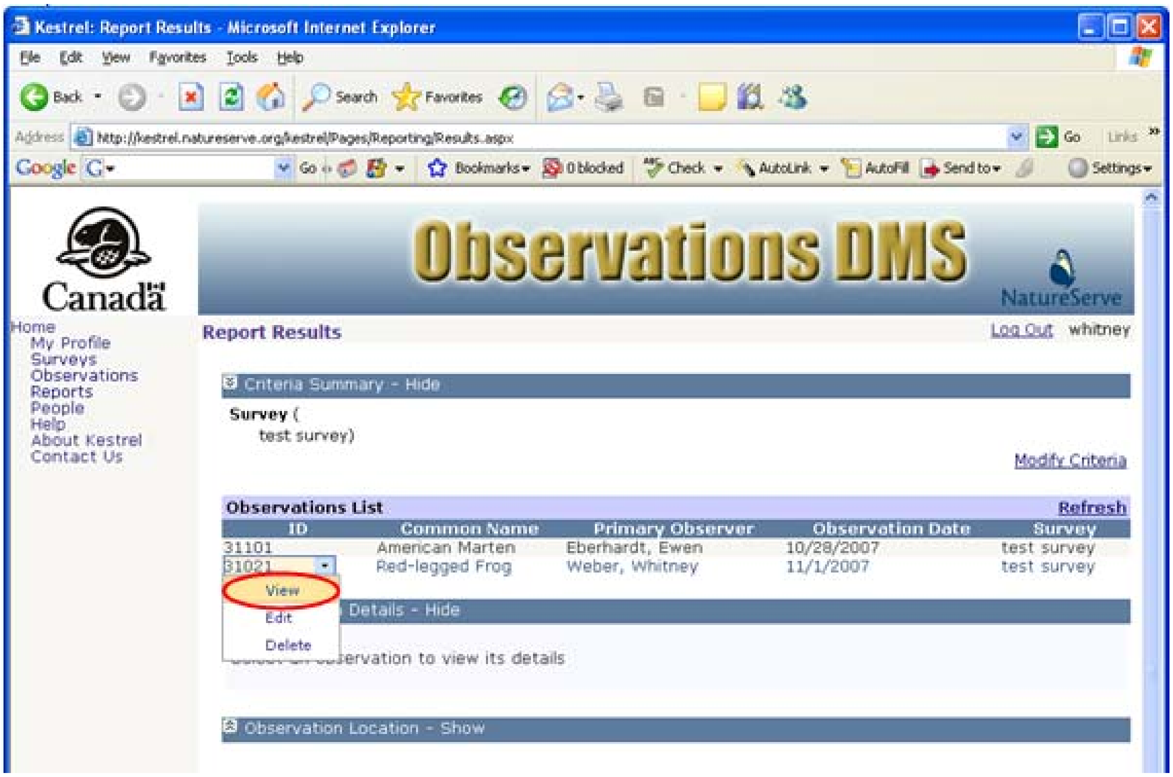


Related Tasks:

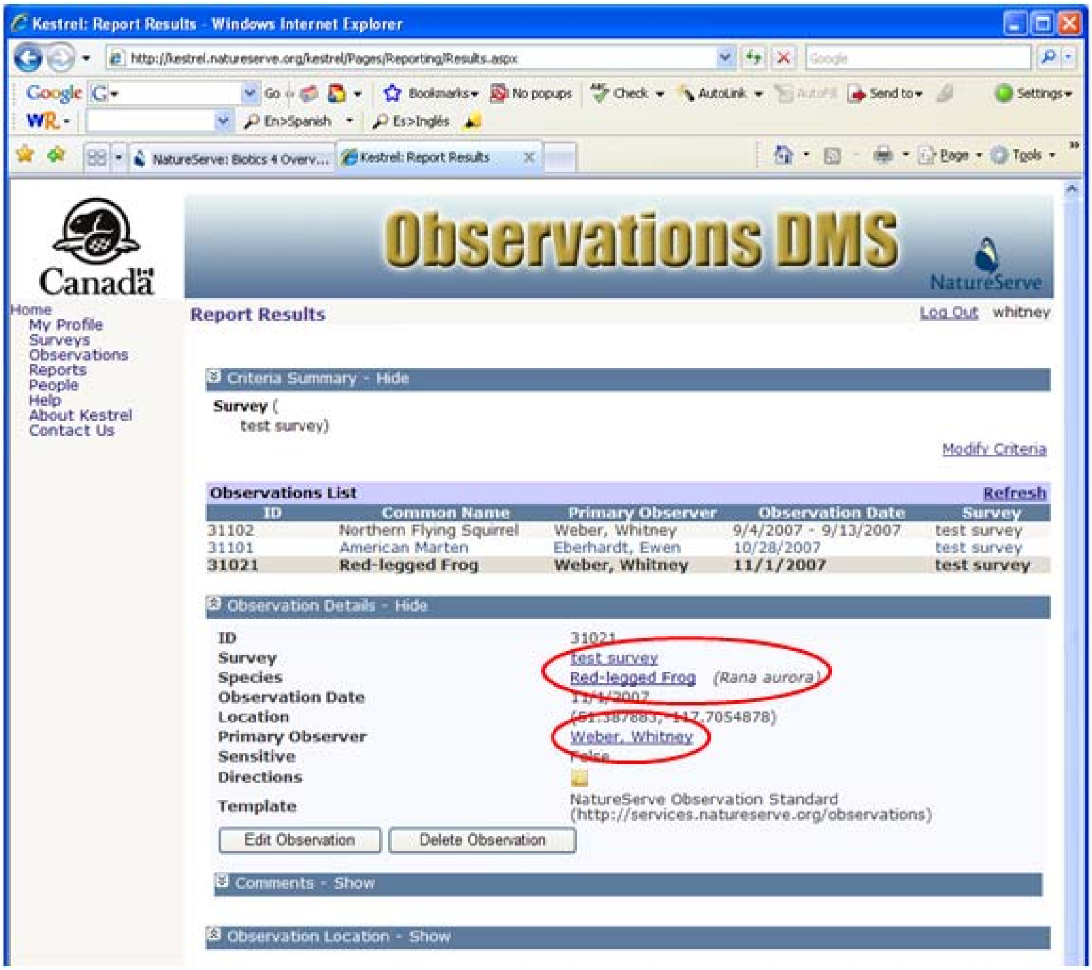
- Clear Criteria
- Define Report Criteria according to
  - Mapped Location
  - Survey
  - Species
  - Named Location
  - Observation Date

View Observation

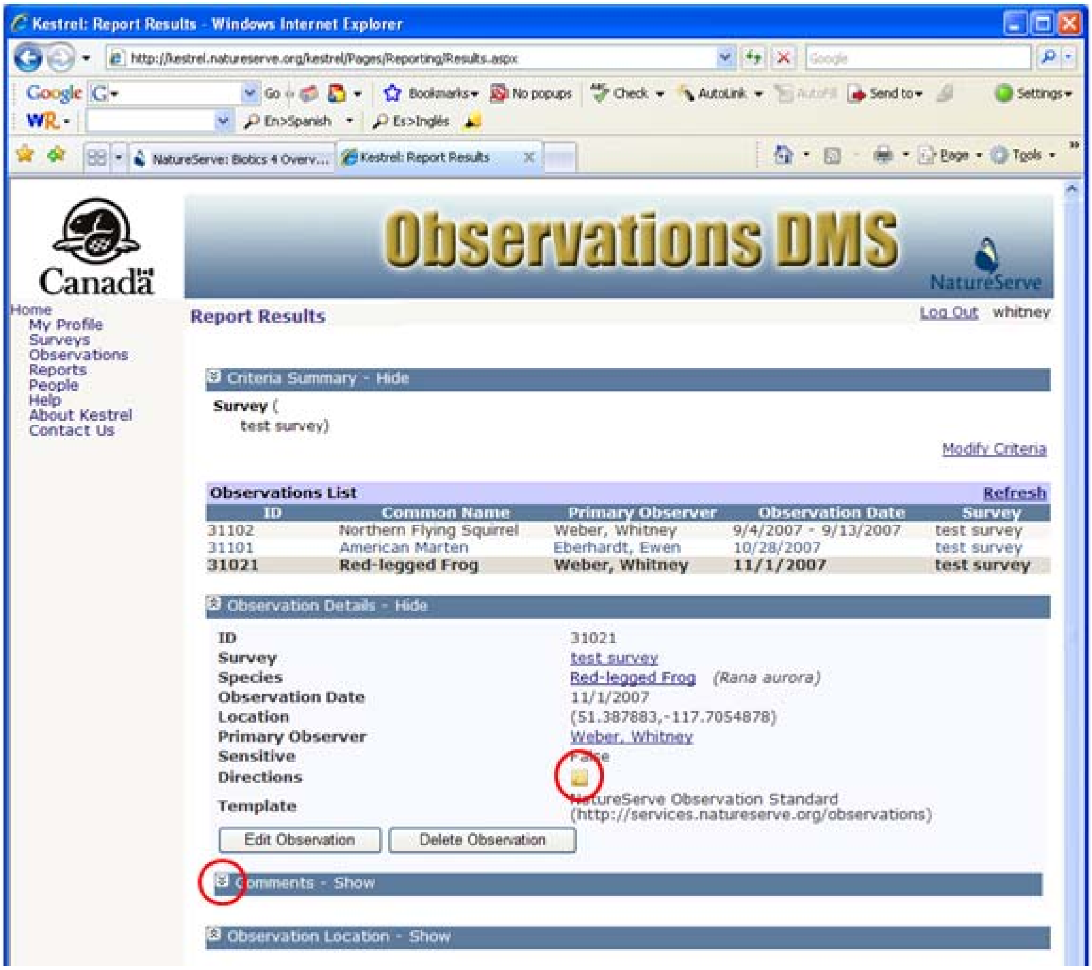
1. Within the *Report Criteria* page, Define Criteria & Generate Report.
2. Within the *Report Results* page, click on the observation record and select **View** from the dropdown list.



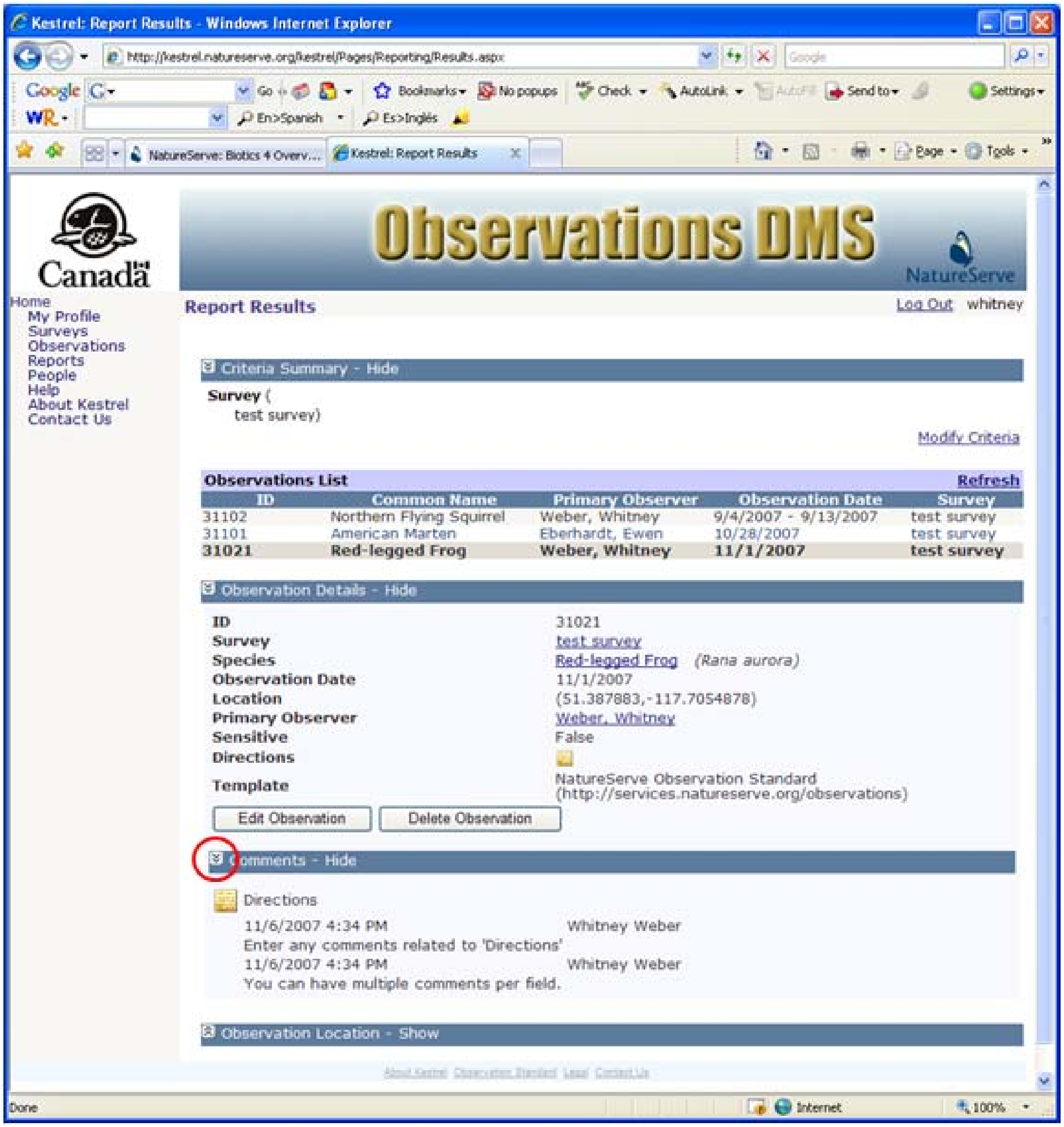
- From within the Observation Details section:
    - click the Survey link to navigate to the *Survey Details* page, from which you can **Edit Survey** and **Delete Survey**;
    - click the Species link to navigate to NatureServe Explorer for further information on the species;
    - click the Primary Observer link to navigate to the *Person Details* page, from which you can **Edit Person** or **Delete Person**.



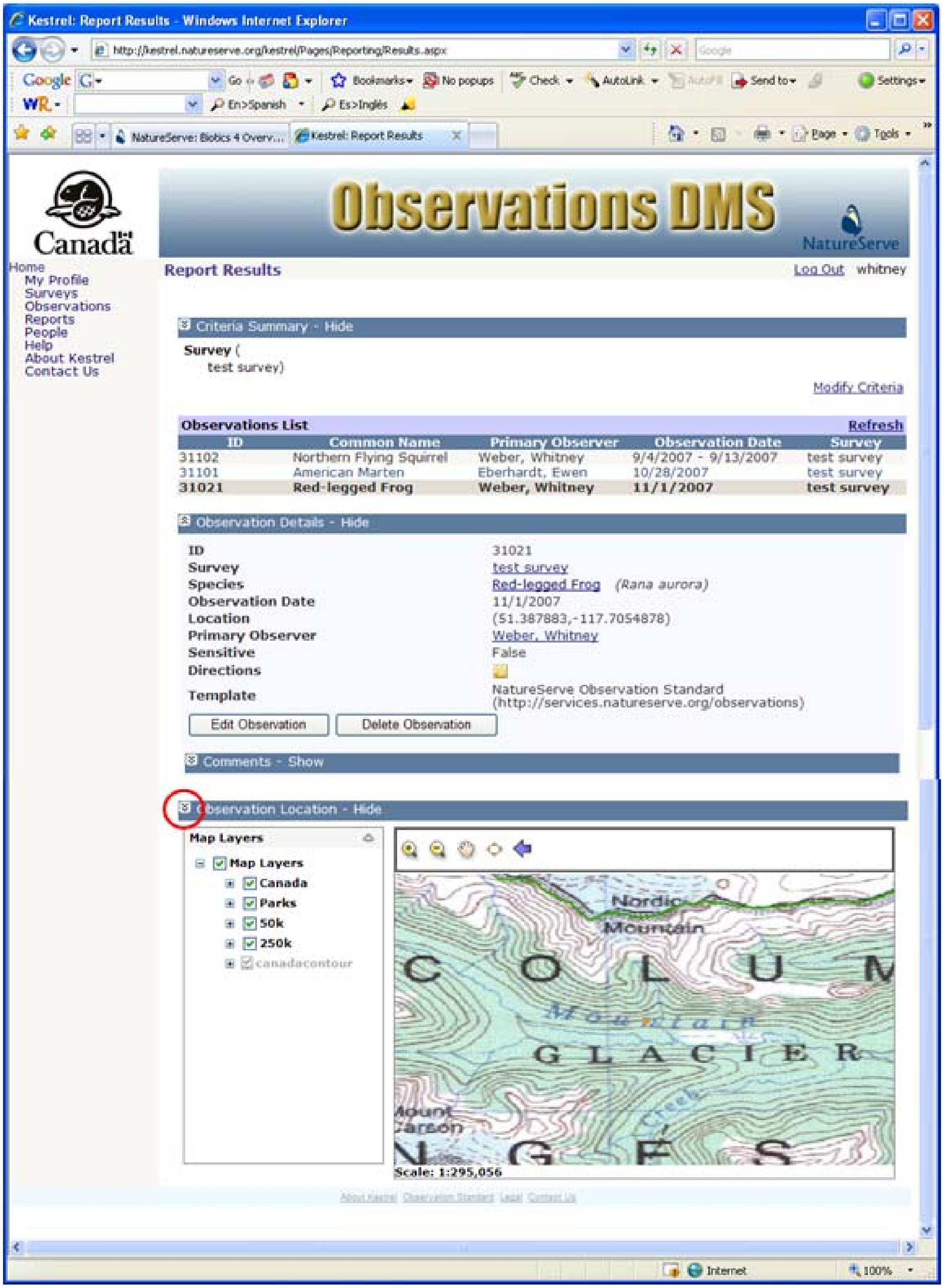
- To view comments, as indicated by the notes icon, expand the Comments section by clicking the icon.



- To hide the Comments section, click the icon.



- To view the Observation Location, expand the Observation Location section, by clicking the icon. Click the icon to hide the Observation Location section.



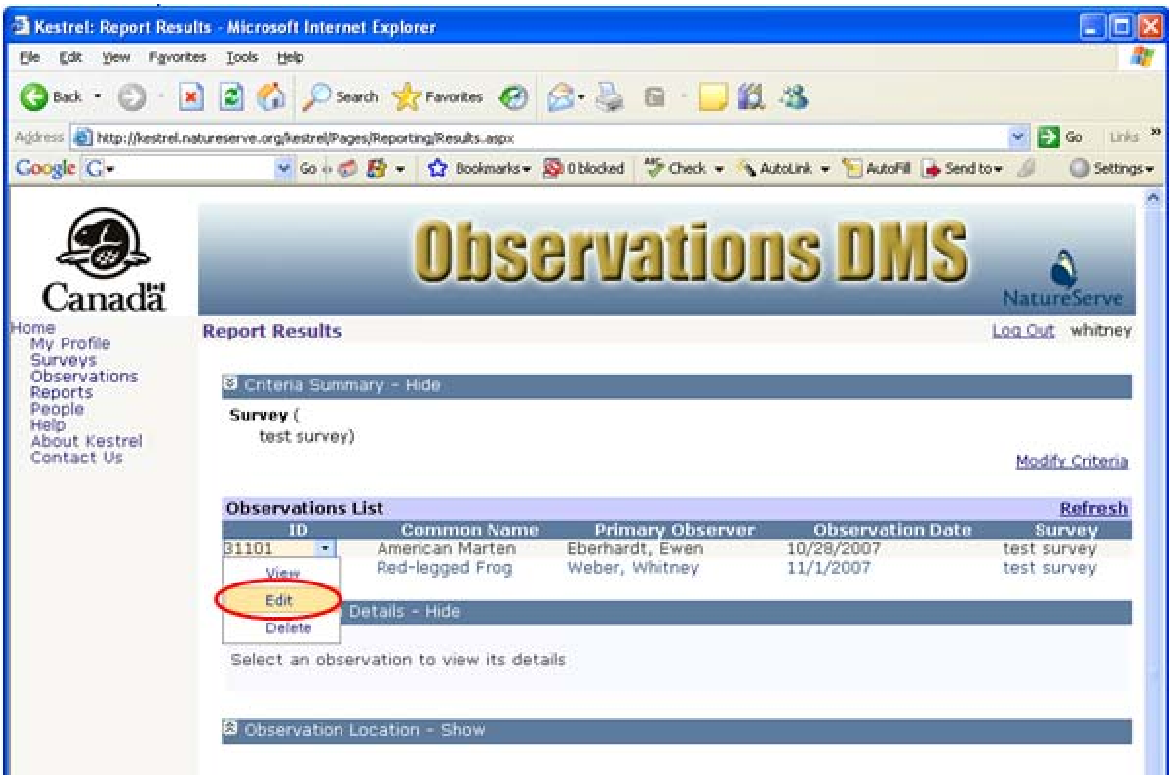
NOTE: See [Mapping Tools]() for more information regarding using the tools associated with the mapping application.

Related Tasks:

- Edit Observation
- Delete Observation
- Export Report Results
- Modify Criteria

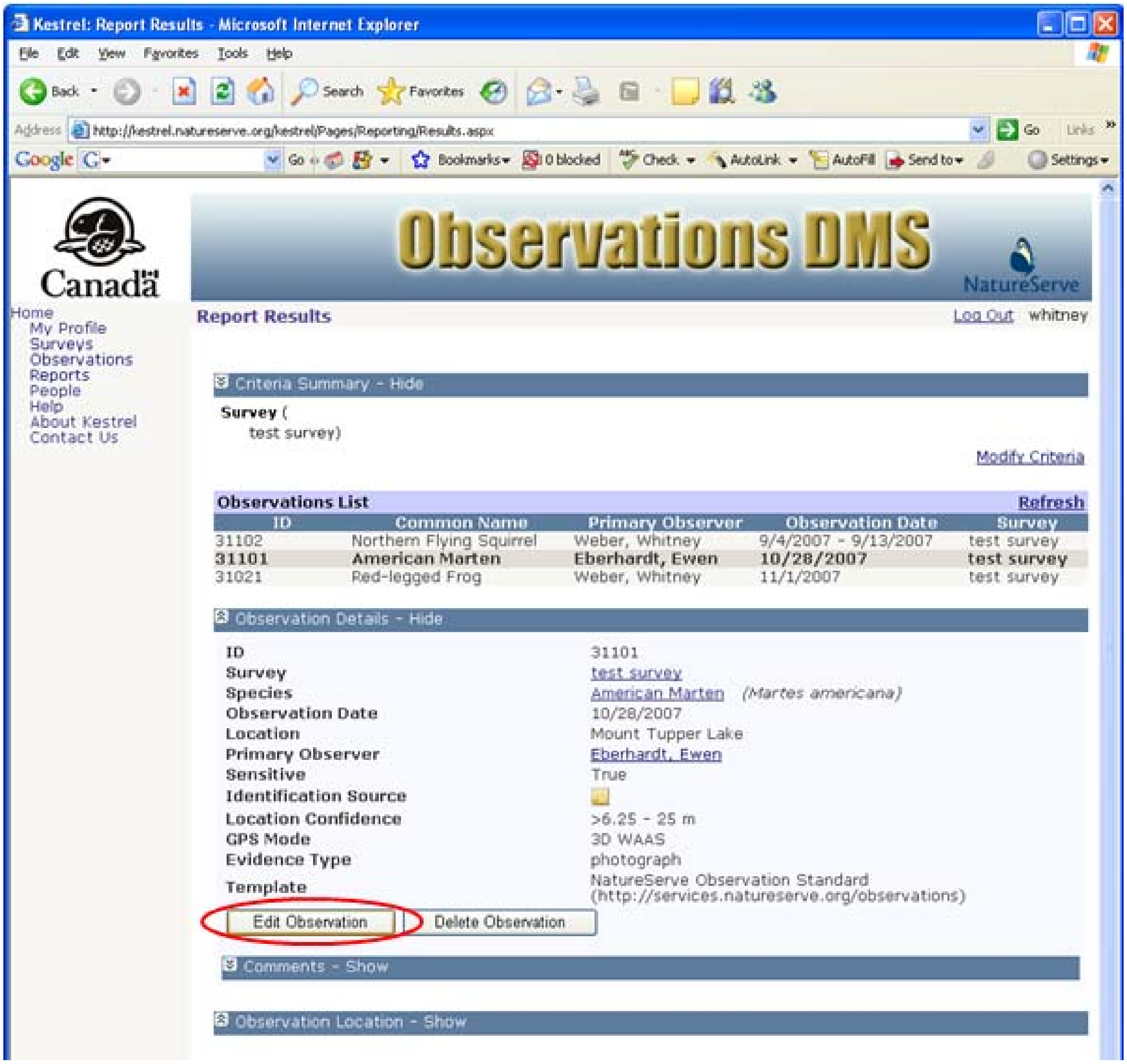
Edit Observation

1. Within the *Report Criteria* page, Define Criteria & Generate Report.
2. Within the *Report Results* page, click on the appropriate observation record and select **Edit** from the dropdown list.



- OR -

Alternatively, if you have already chosen to **View** the observation record, within the Observation Details section select **Edit Observation**.



3. Within the *Edit Observation* page, fill out the various fields with appropriate information. The core fields are listed below. For further information on any of the fields, click the appropriate link below.

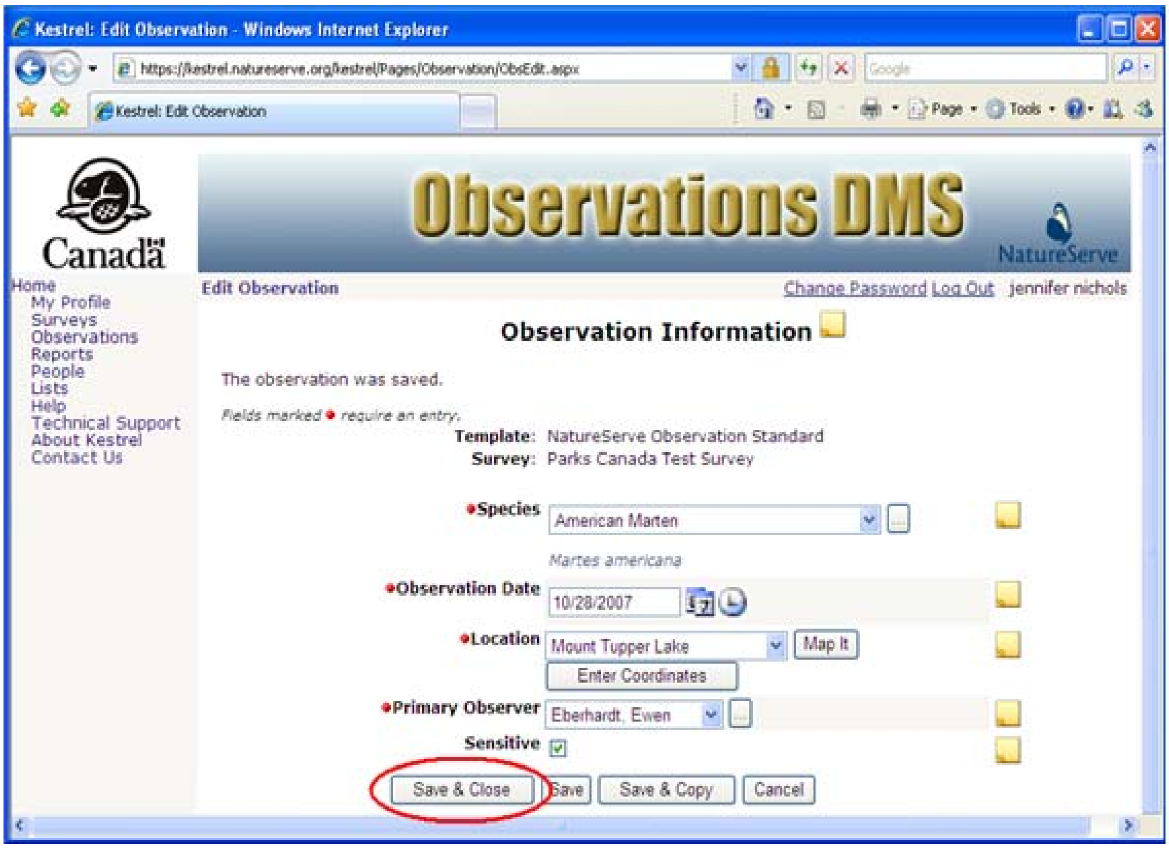
- Template - Read Only
- Survey - Read Only
- Species - Required
- Observation Date - Required
- Location - Required
- Primary Observer - Required
- Sensitive
- Not Found

NOTE: Additional fields are specific to the template used by the survey containing the observation record. Further information regarding these non-core fields can be determined by placing the cursor over the field name, to obtain fly-over help.

4. **Save & Close** the observation record.

NOTE: Other options include:

- **Save**, which allows you to save the record but continue editing it;
- **Save & Copy**, which will save the record, create a copy of it and open the new record.

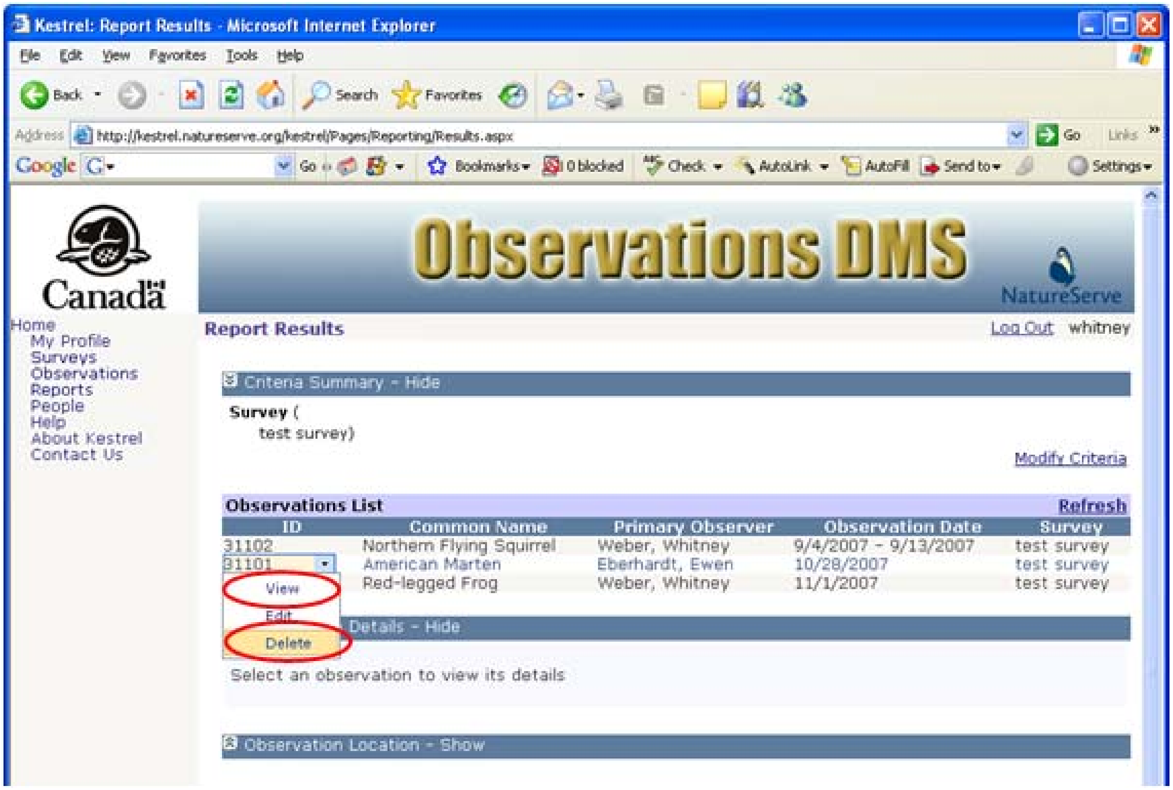


Related Tasks:

- Select a Species
- Create New Location
- Edit Location
- Select Primary Observer

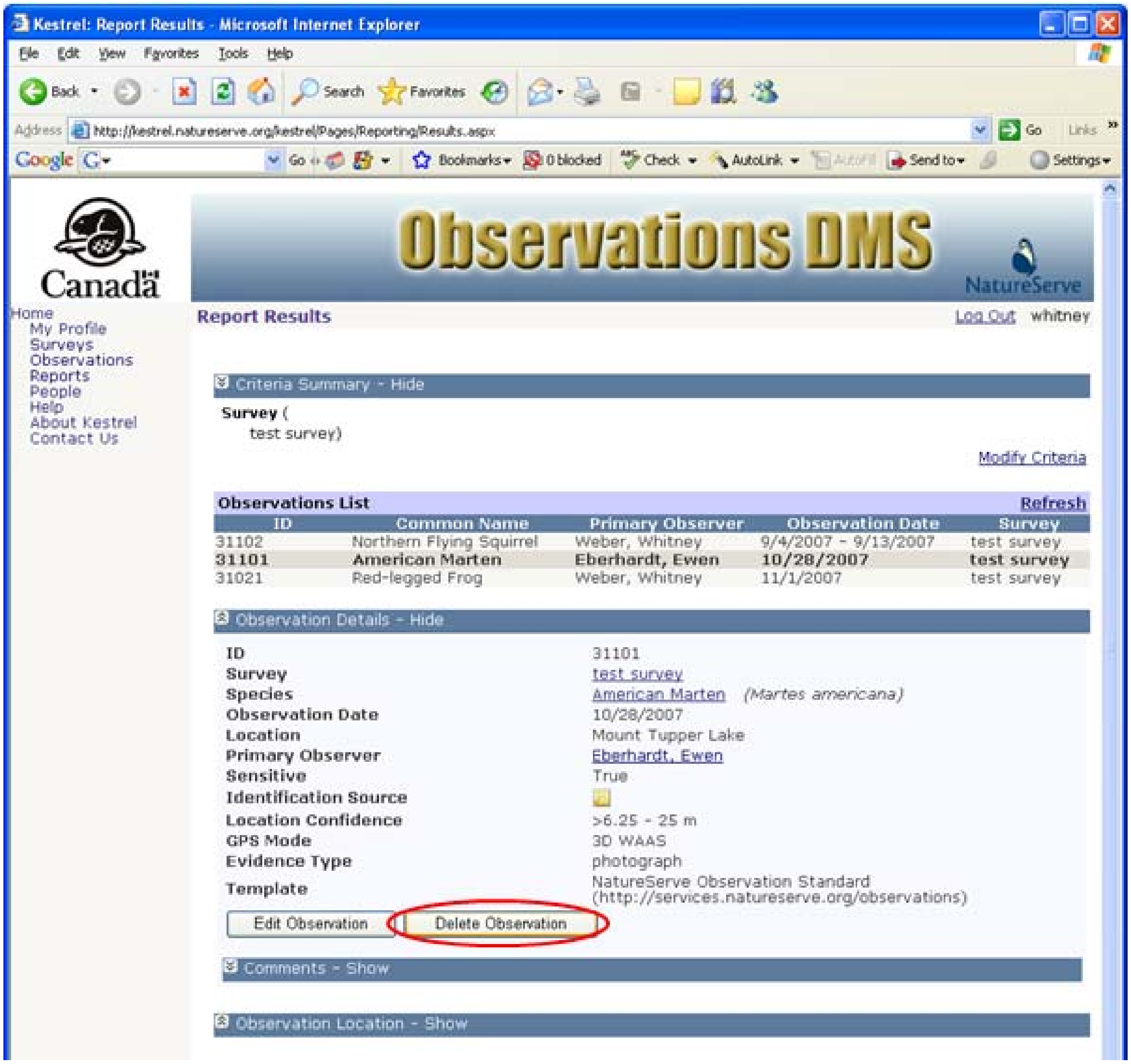
Delete Observation

1. Within the *Report Criteria* page, Define Criteria & Generate Report.
2. Within the *Report Results* page, click on the appropriate observation record and select **Delete** from the dropdown list.

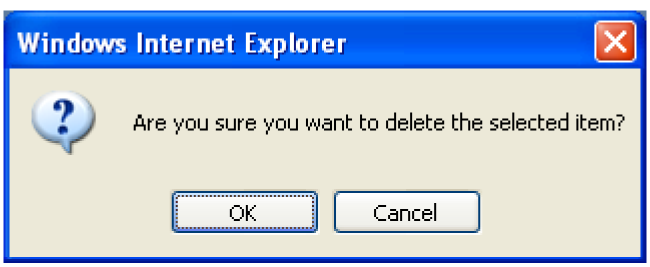


- OR -

Alternatively, if you have already chosen to **View** the observation record, within the Observation Details section, select **Delete Observation**.



3. You have the option to **CANCEL** the deletion at this point or you can proceed to delete the observation record by selecting **OK**.



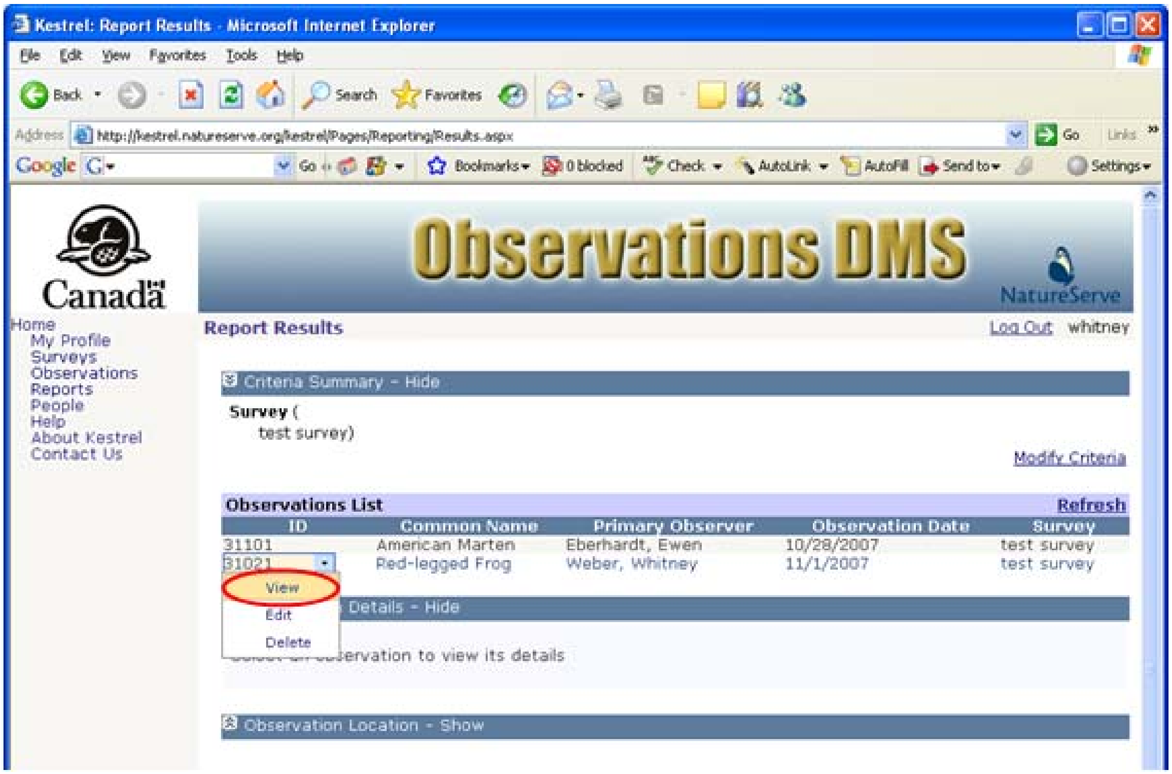
Related Tasks:

- Edit Observation
- Export Report Results

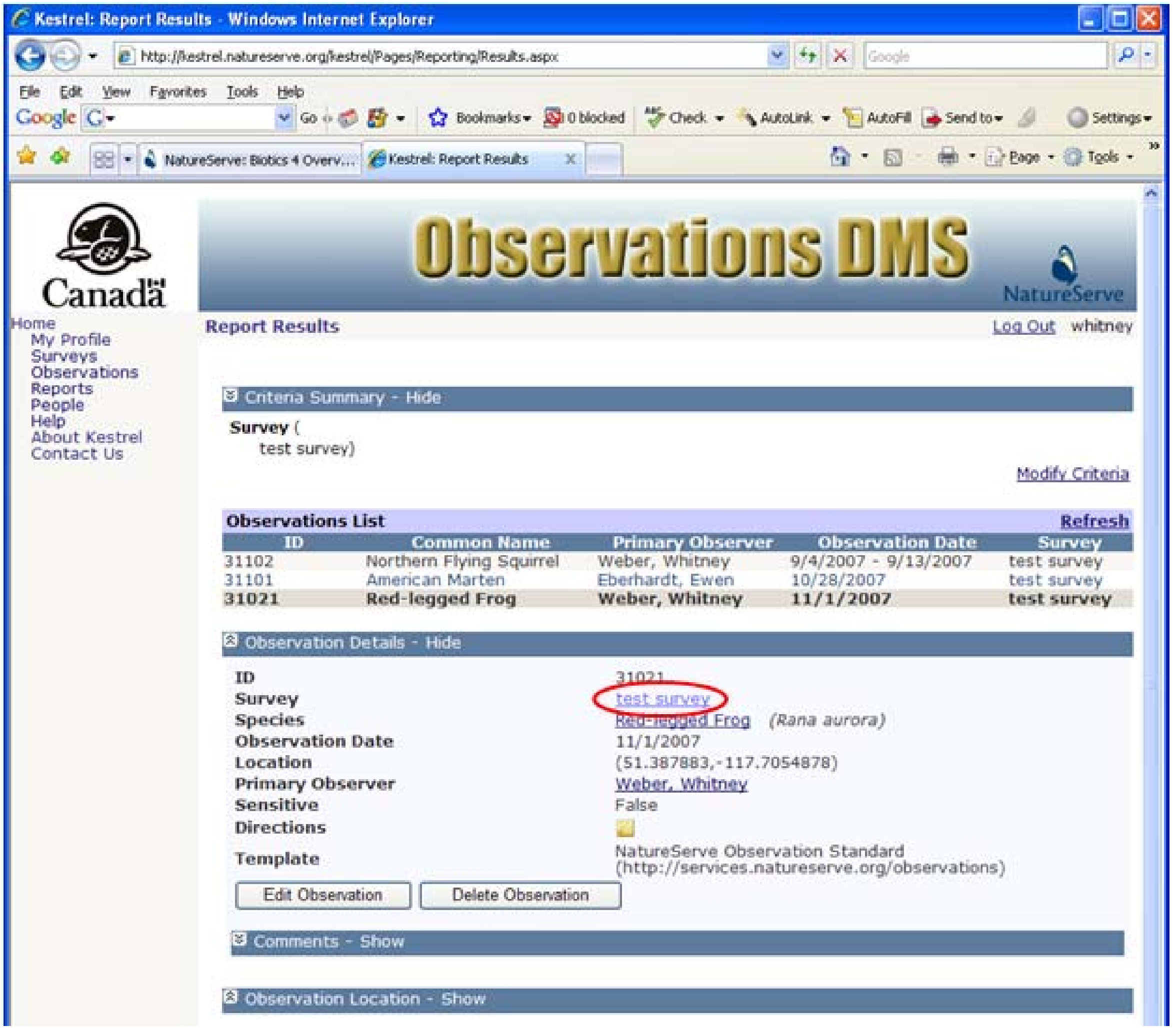
- Modify Criteria

View Survey

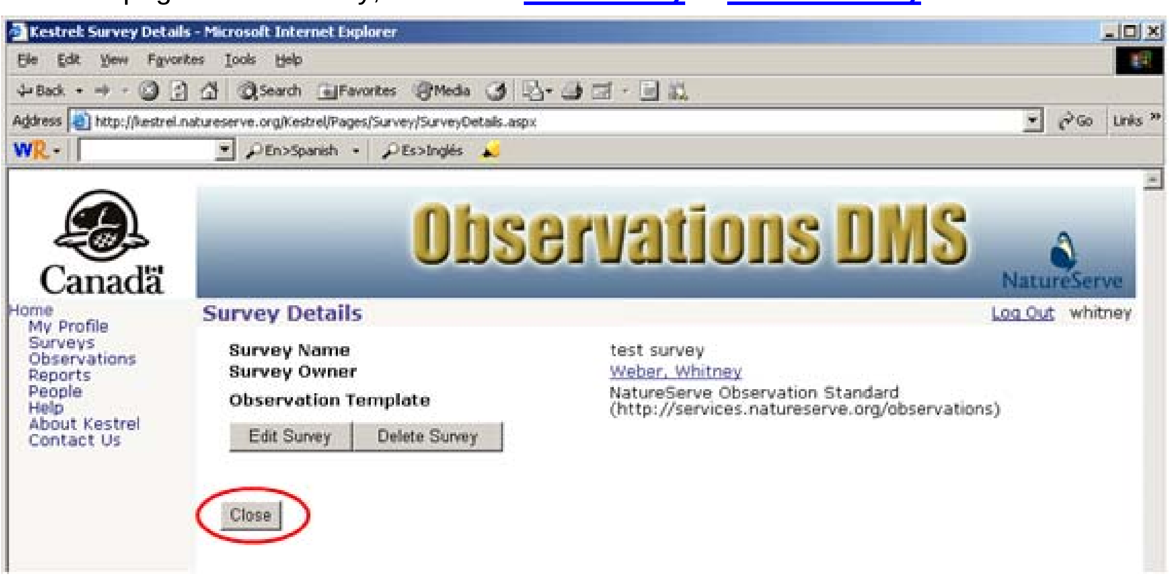
1. Within the *Report Criteria* page, Define Criteria & Generate Report.
2. Within the *Report Results* page, click on the observation record and select **View** from the dropdown list.



3. From within the Observation Details section, click the Survey link to navigate to the *Survey Details* page.



4. Within the *Survey Details* page, **Close** the window, which will return you to the *Report Results* page. Alternatively, choose to **Edit Survey** or **Delete Survey**.

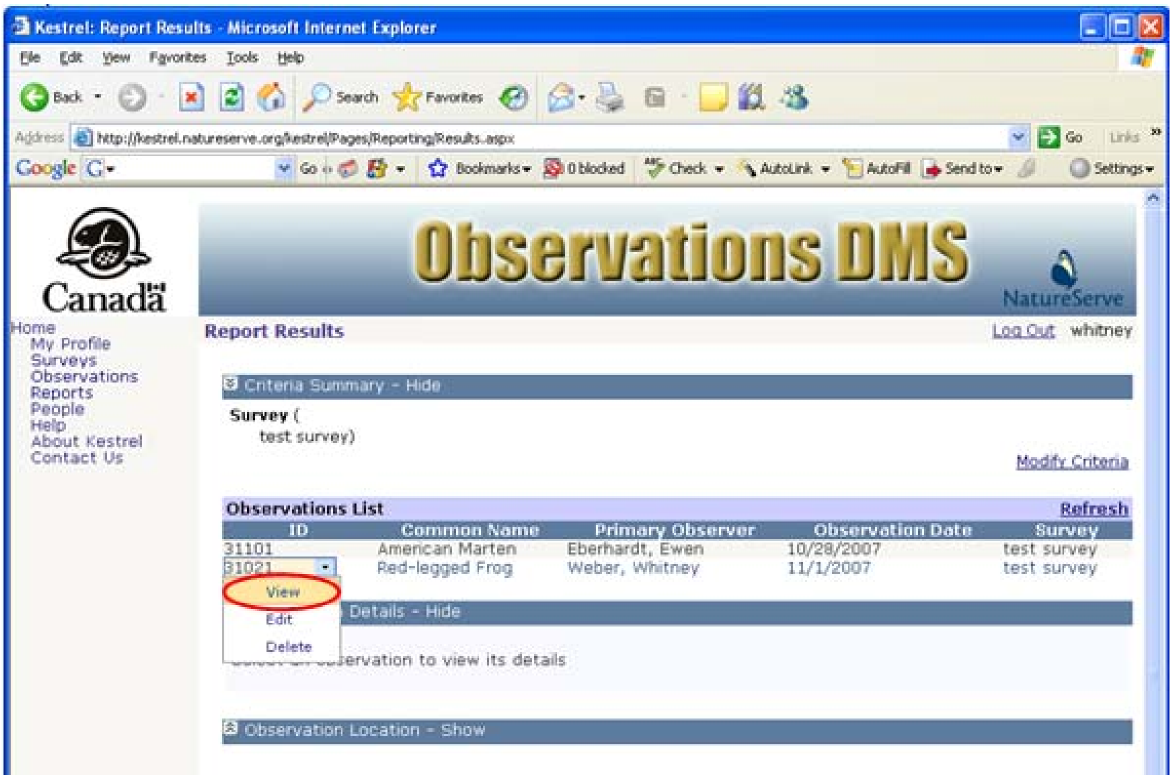


Related Tasks:

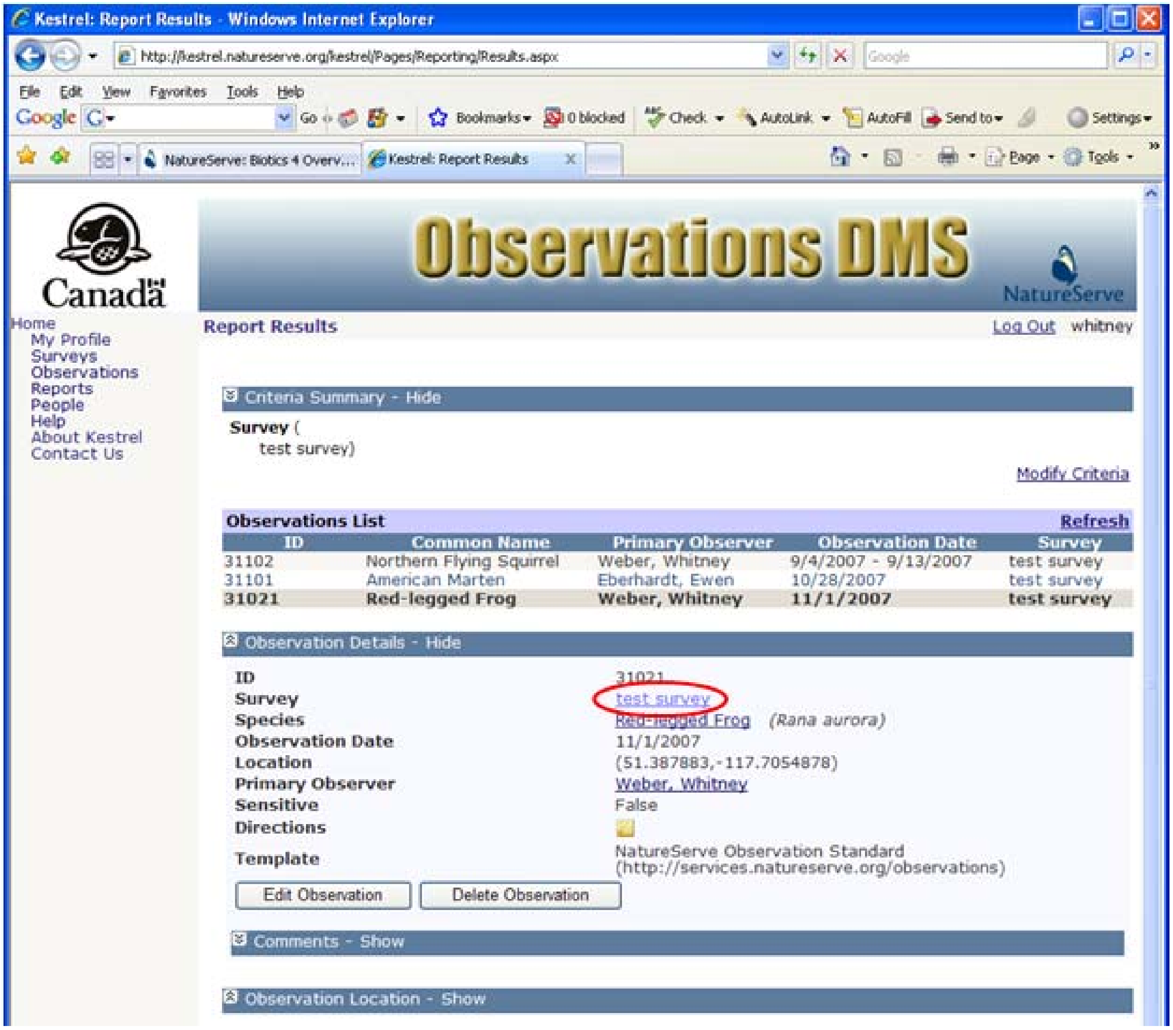
- Edit Survey
- Delete Survey

Edit Survey

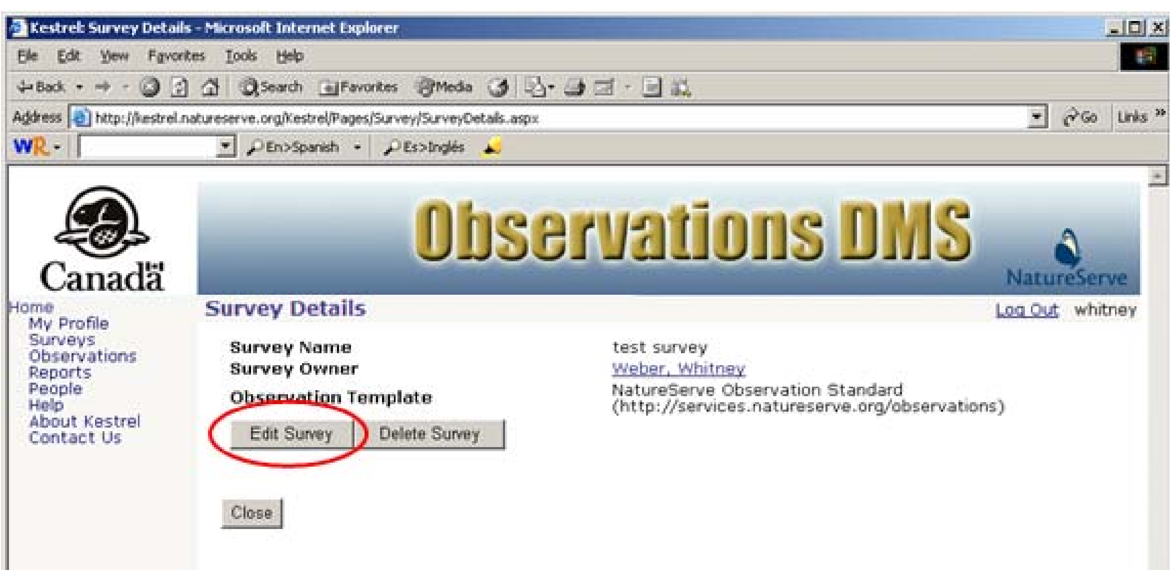
1. Within the *Report Criteria* page, Define Criteria & Generate Report.
2. Within the *Report Results* page, click on the observation record and select **View** from the dropdown list.



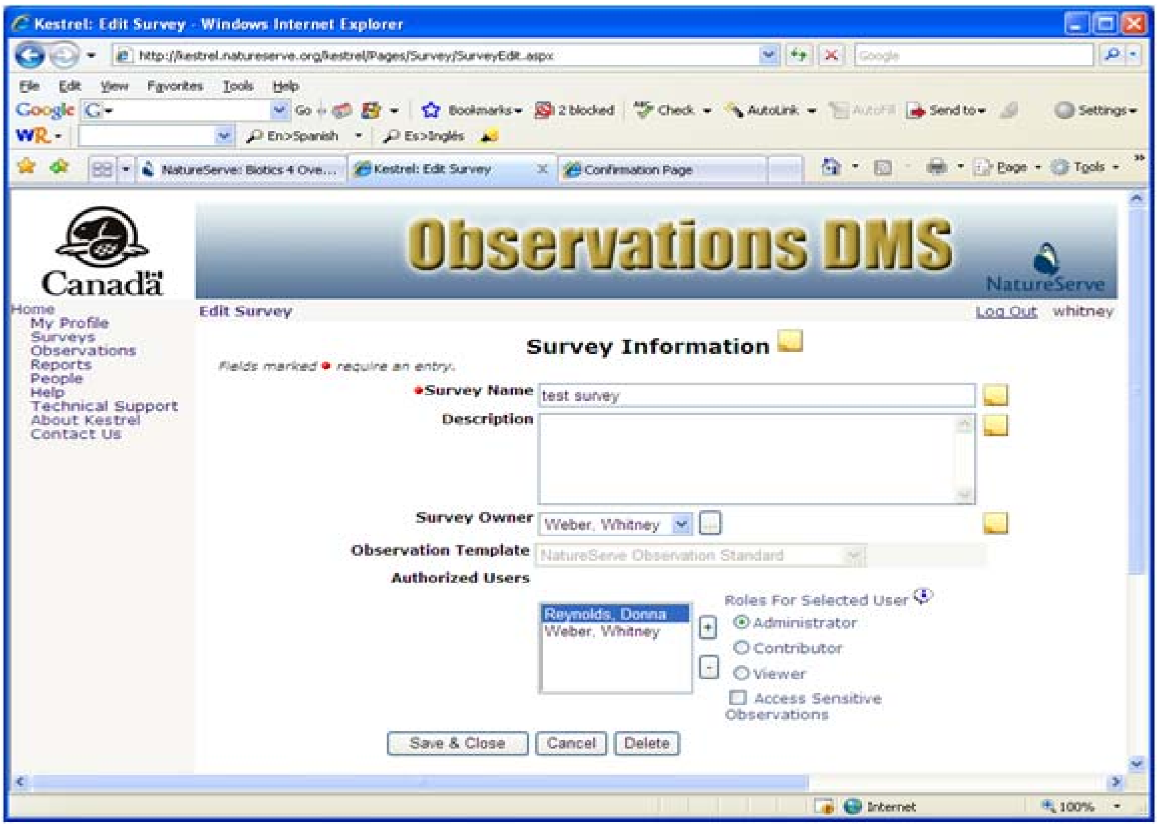
3. From within the Observation Details section, click the Survey link to navigate to the *Survey Details* page.



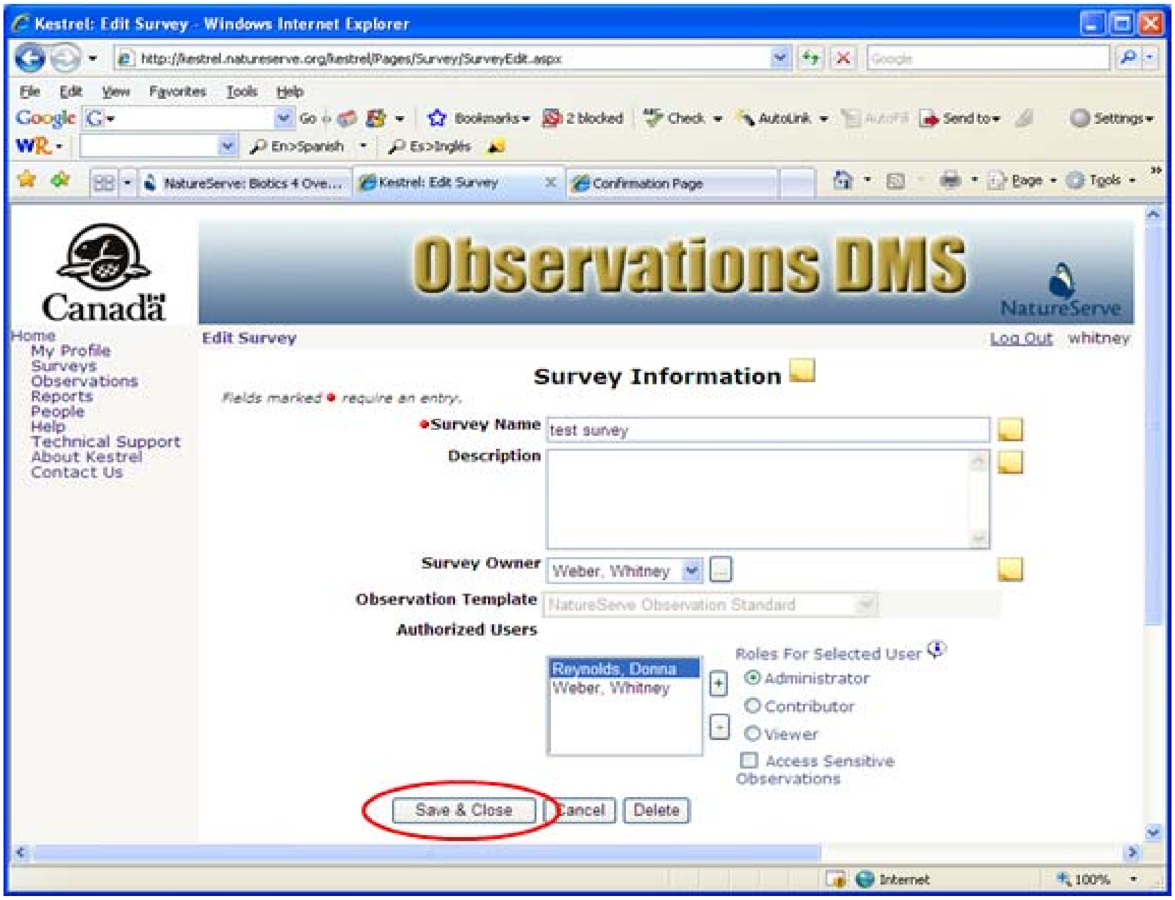
4. Within the *Survey Details* page, click **Edit Survey** which will take you to the *Edit Survey* page.



5. Within the *Edit Survey* page, fill out the various fields with appropriate. For further information on any of the fields, click the appropriate link below.
    - Survey Name - Required
    - Description
    - Survey Owner
    - Observation Template
    - Authorized Users
    - Roles for Selected User
    - Access Sensitive Observations



6. **Save & Close** the survey.

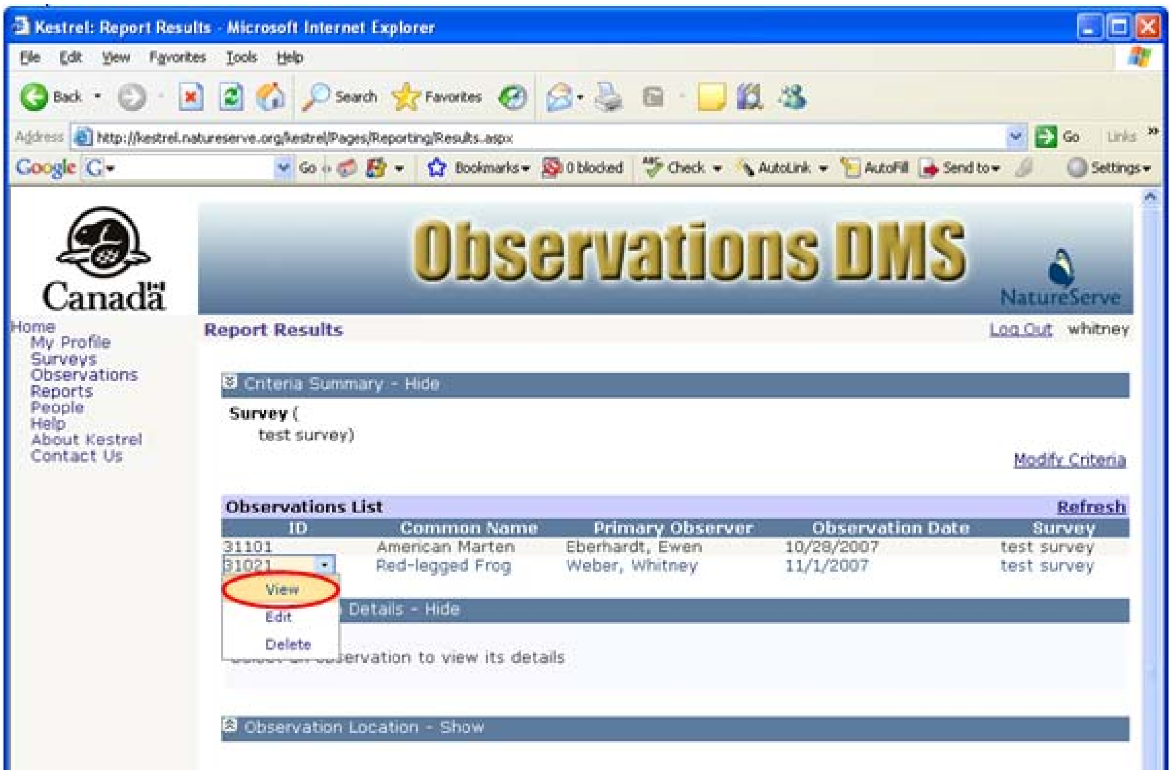


Related Tasks:

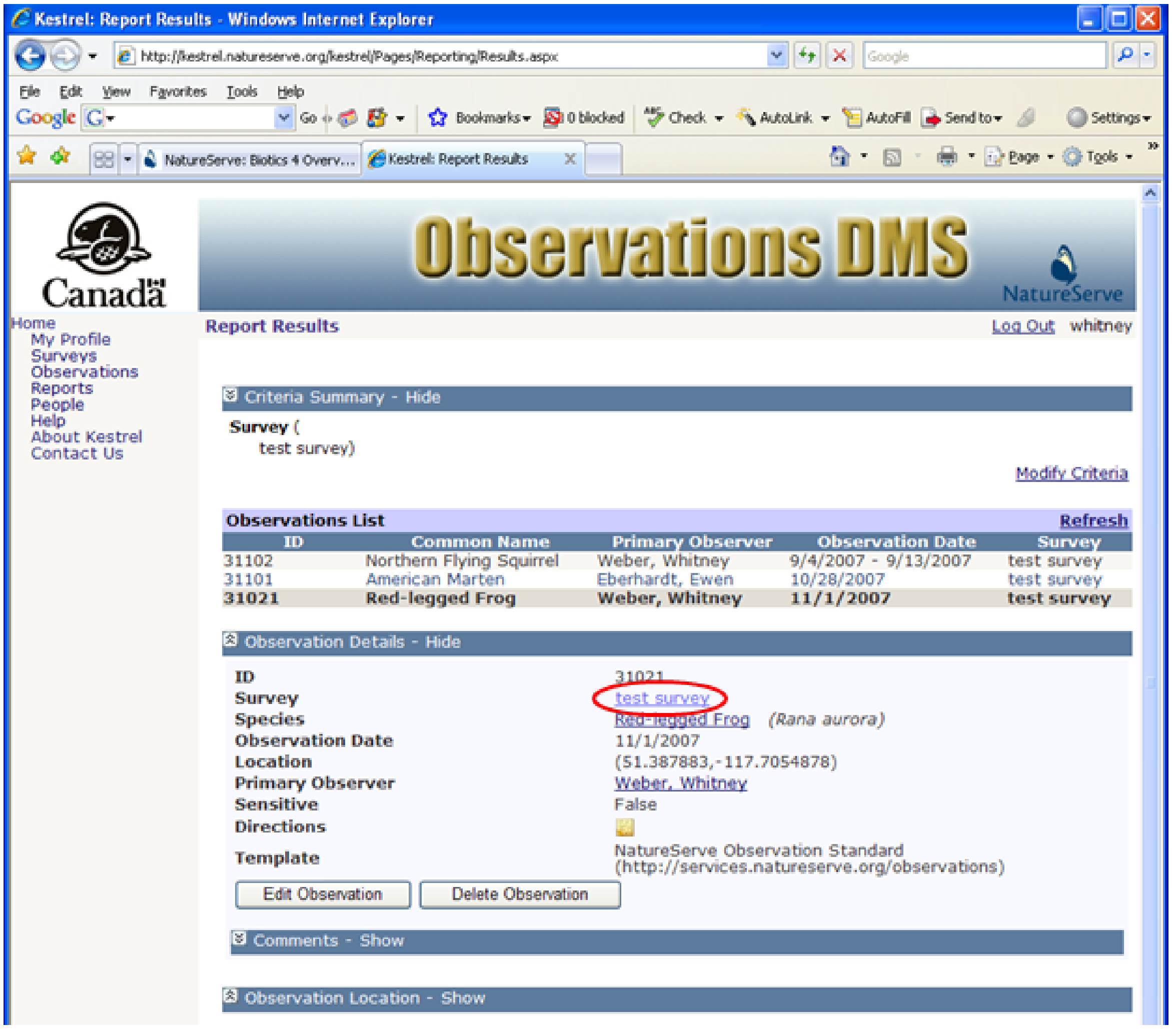
- Select Survey Owner
- Add Authorized User

Delete Survey

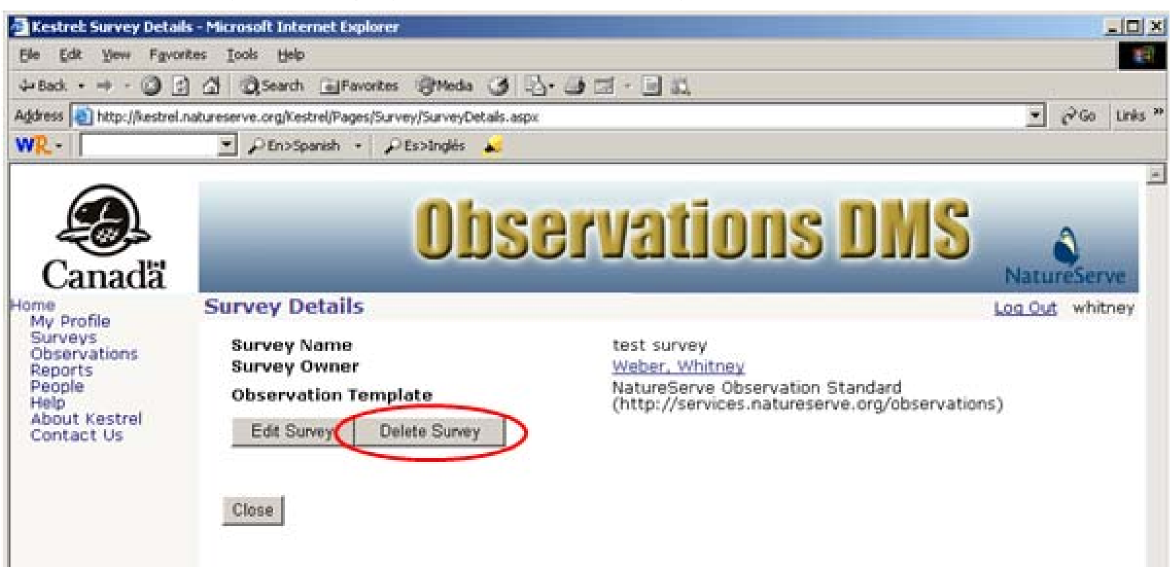
1. Within the *Report Criteria* page, Define Criteria & Generate Report.
2. Within the *Report Results* page, click on the observation record and select **View** from the dropdown list.



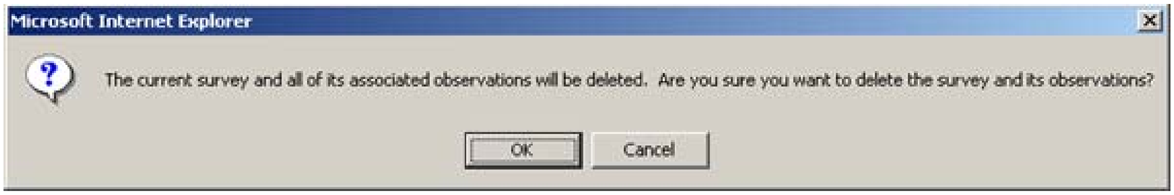
3. From within the Observation Details section, click the Survey link to navigate to the *Survey Details* page.



4. Within the *Survey Details* page, click **Delete Survey**.

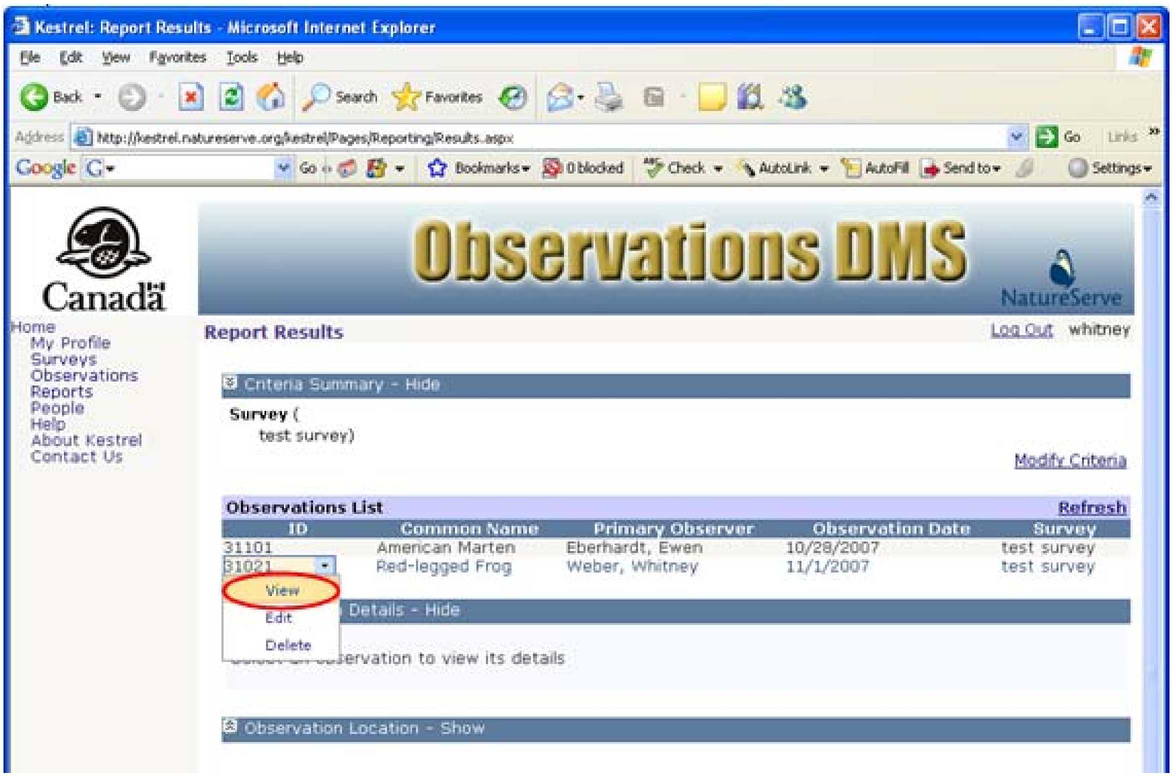


5. If a survey already contains observations, all observations contained within that survey will be deleted. You have the option to **CANCEL** the deletion at this point or you can proceed to delete the survey and all of its observations by selecting **OK**.

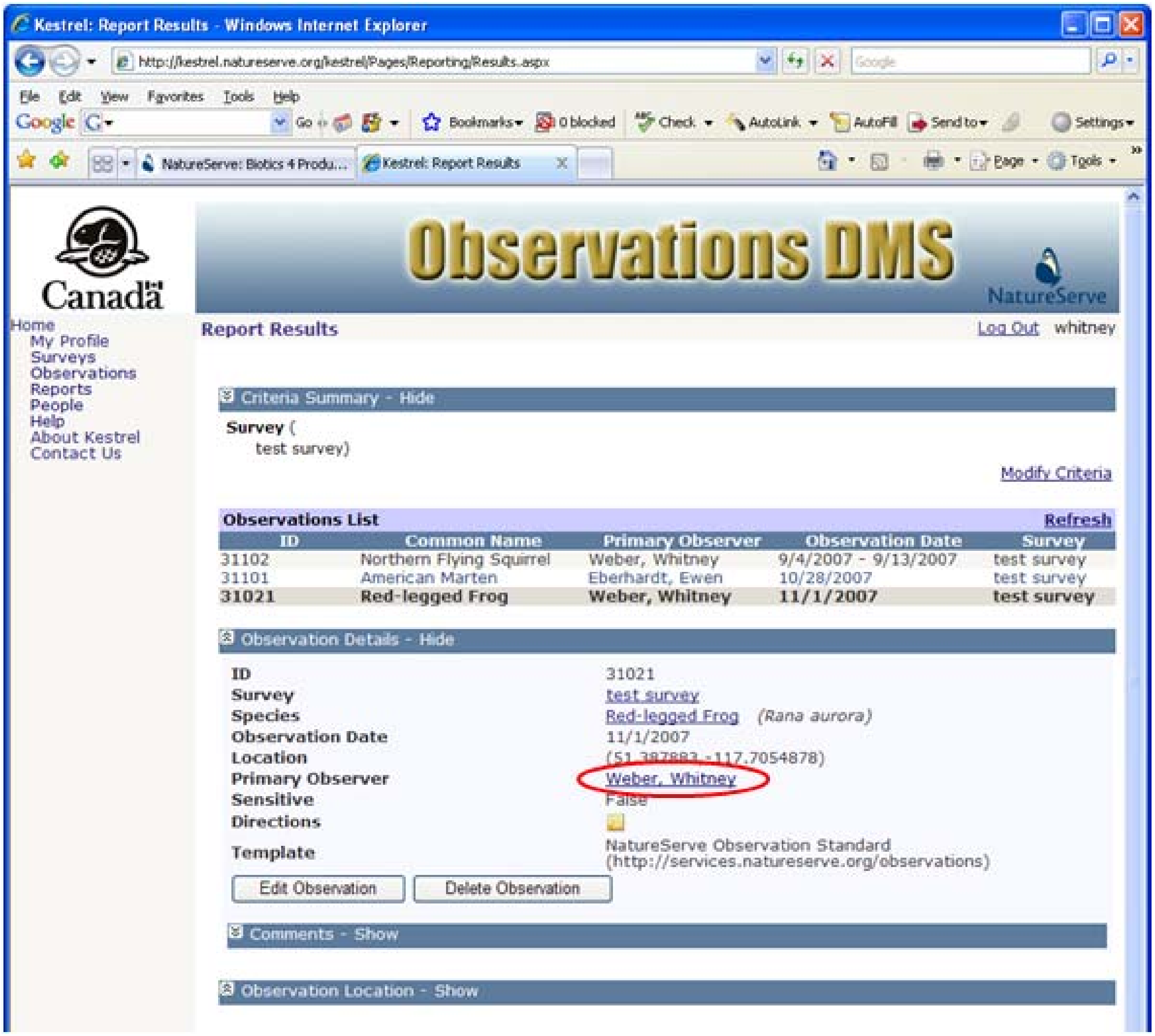


View Person

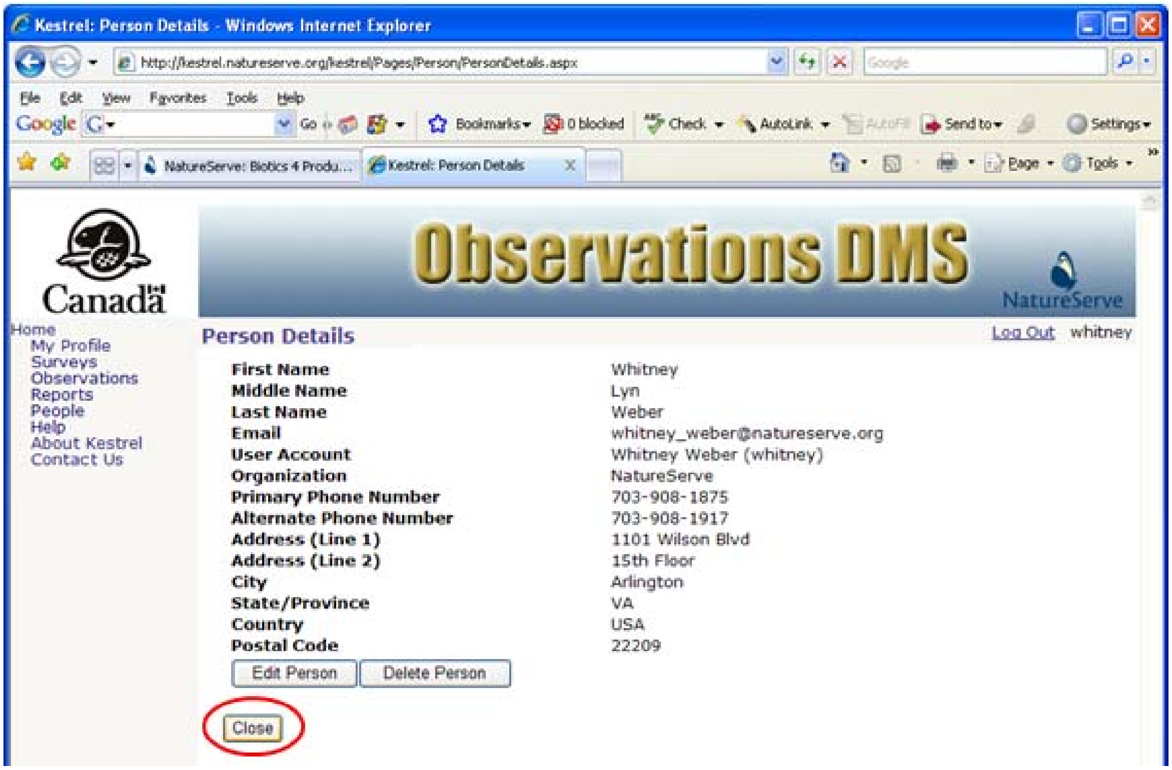
1. Within the *Report Criteria* page, Define Criteria & Generate Report.
2. Within the *Report Results* page, click on the observation record and select **View** from the dropdown list.



3. From within the Observation Details section, click the Primary Observer link to navigate to the *Person Details* page.



4. Within the *Person Details* page, choose to **Close** the window, which will return you to the *Observations* page. Alternatively, choose to **Edit Person** or **Delete Person**.

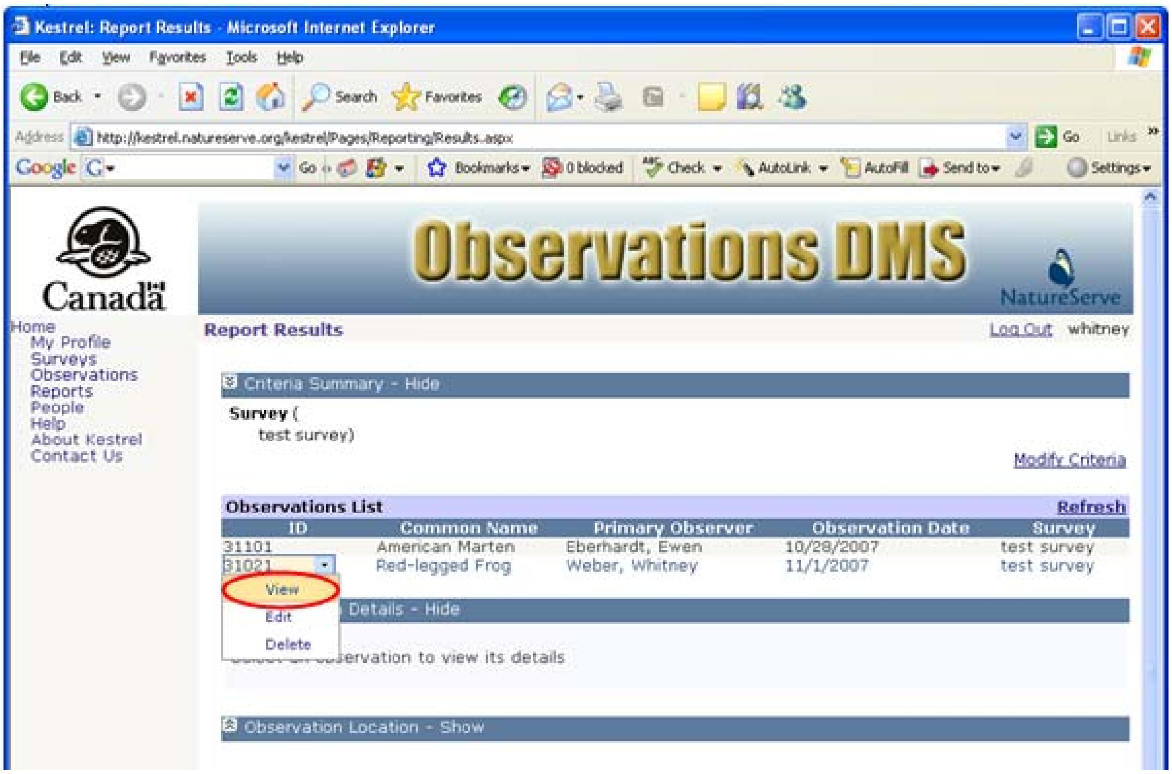


Related Tasks:

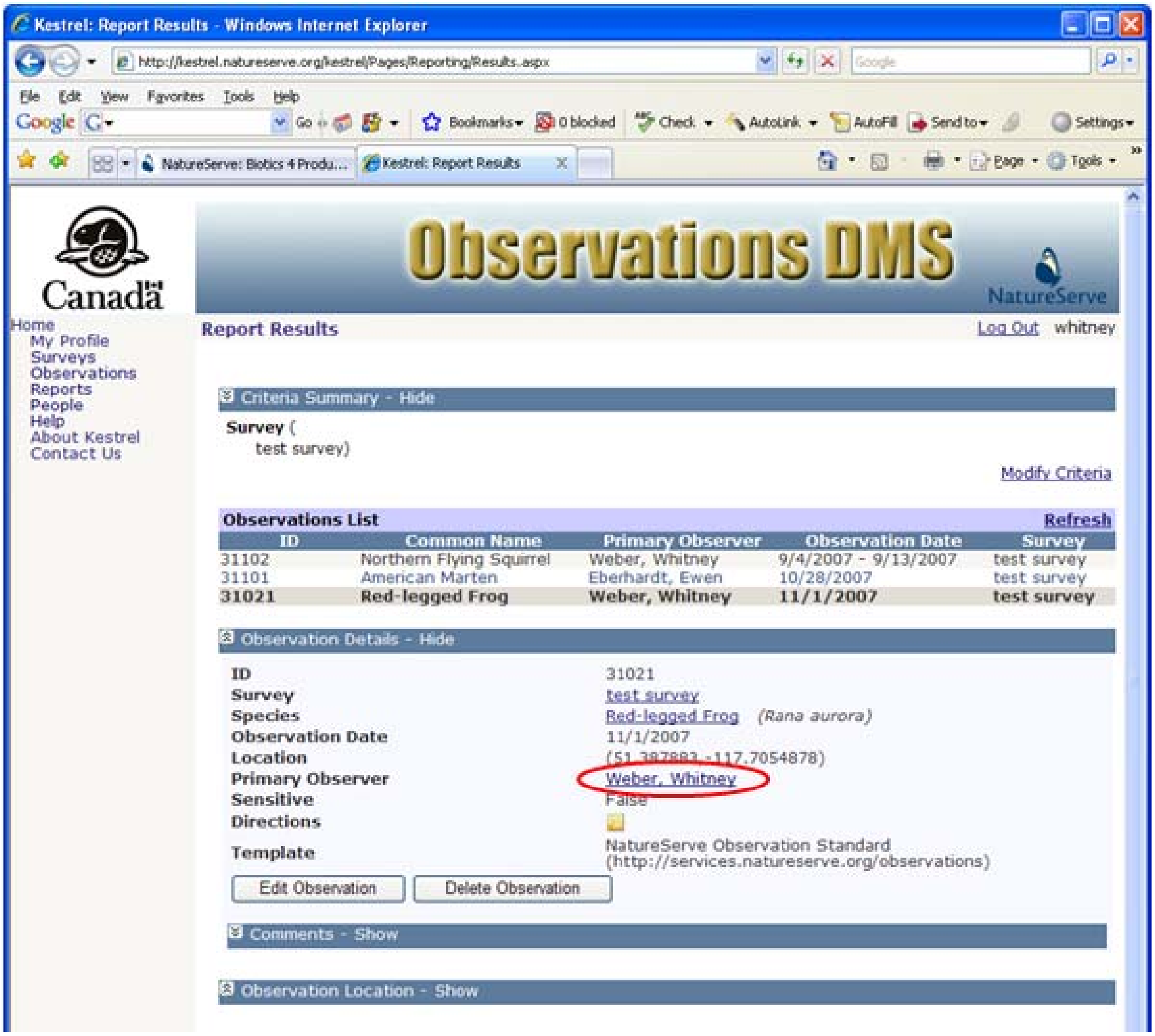
- Edit Person
- Delete Person

Edit Person

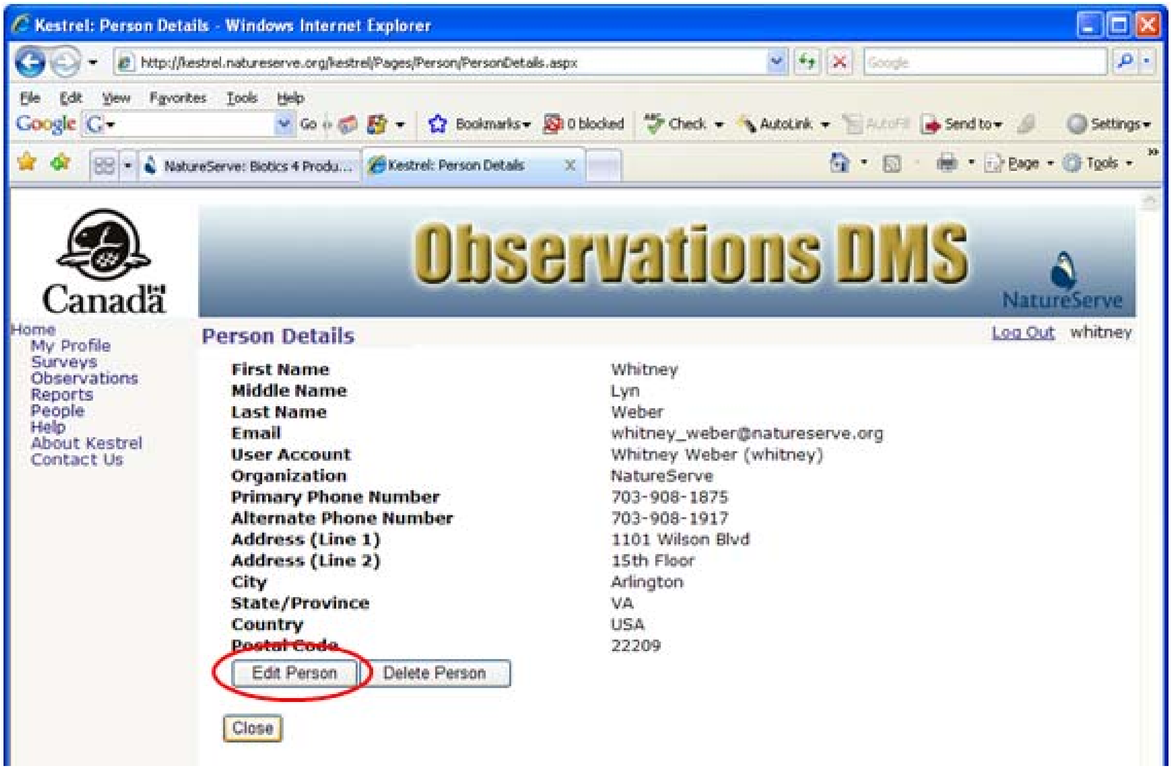
1. Within the *Report Criteria* page, Define Criteria & Generate Report.
2. Within the *Report Results* page, click on the observation record and select **View** from the dropdown list.



3. From within the Observation Details section, click the Primary Observer link to navigate to the *Person Details* page.

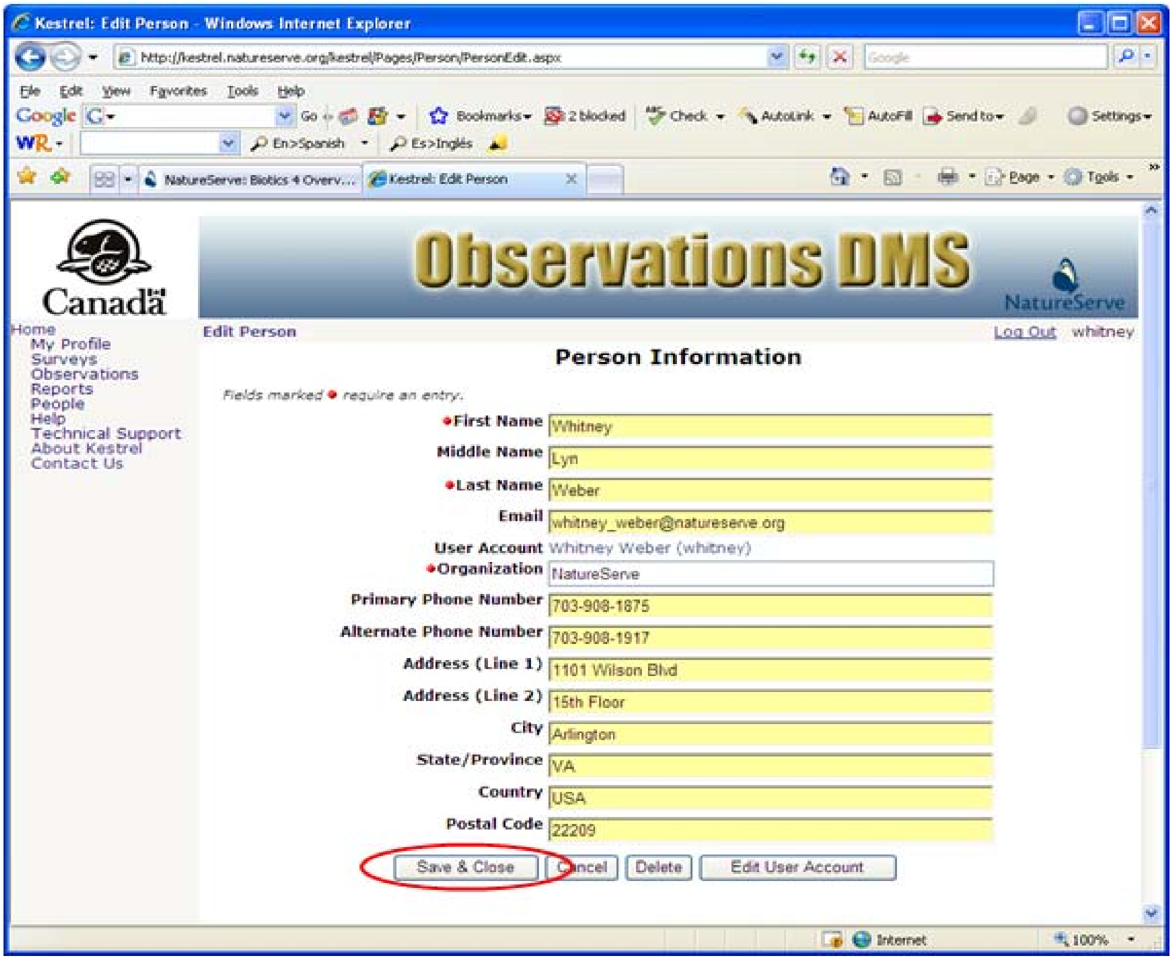


4. Within the *Person Details* page, choose to **Edit Person**.



5. Within the *Edit Person* page, fill out the various fields as appropriate. For further information on any of the fields, click the appropriate link below.
    - First Name - Required
    - Middle Name
    - Last Name - Required
    - Email
    - User Account - Read Only
    - Organization - Required
    - Primary Phone Number
    - Alternate Phone Number
    - Address (Line 1)
    - Address (Line 2)
    - City
    - State/Province
    - Country
    - Postal Code

6. **Save & Close** the person record.



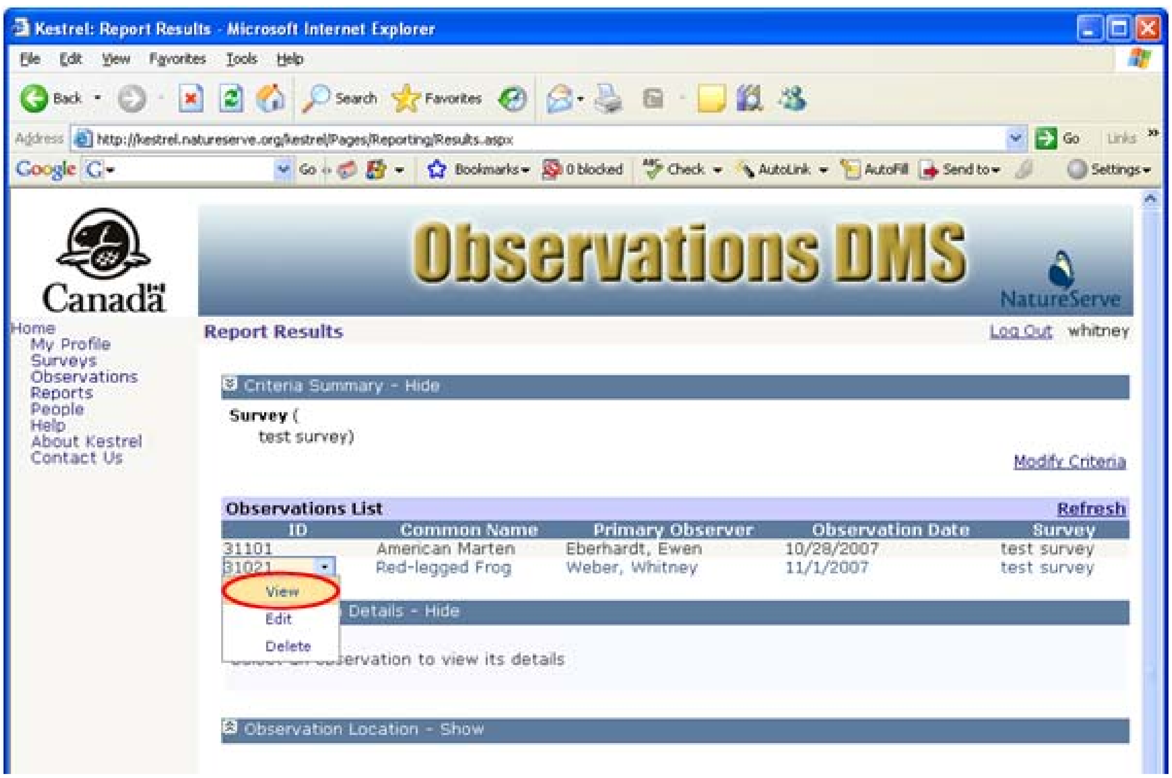
Related Tasks:

- Edit User Account
- Delete Person

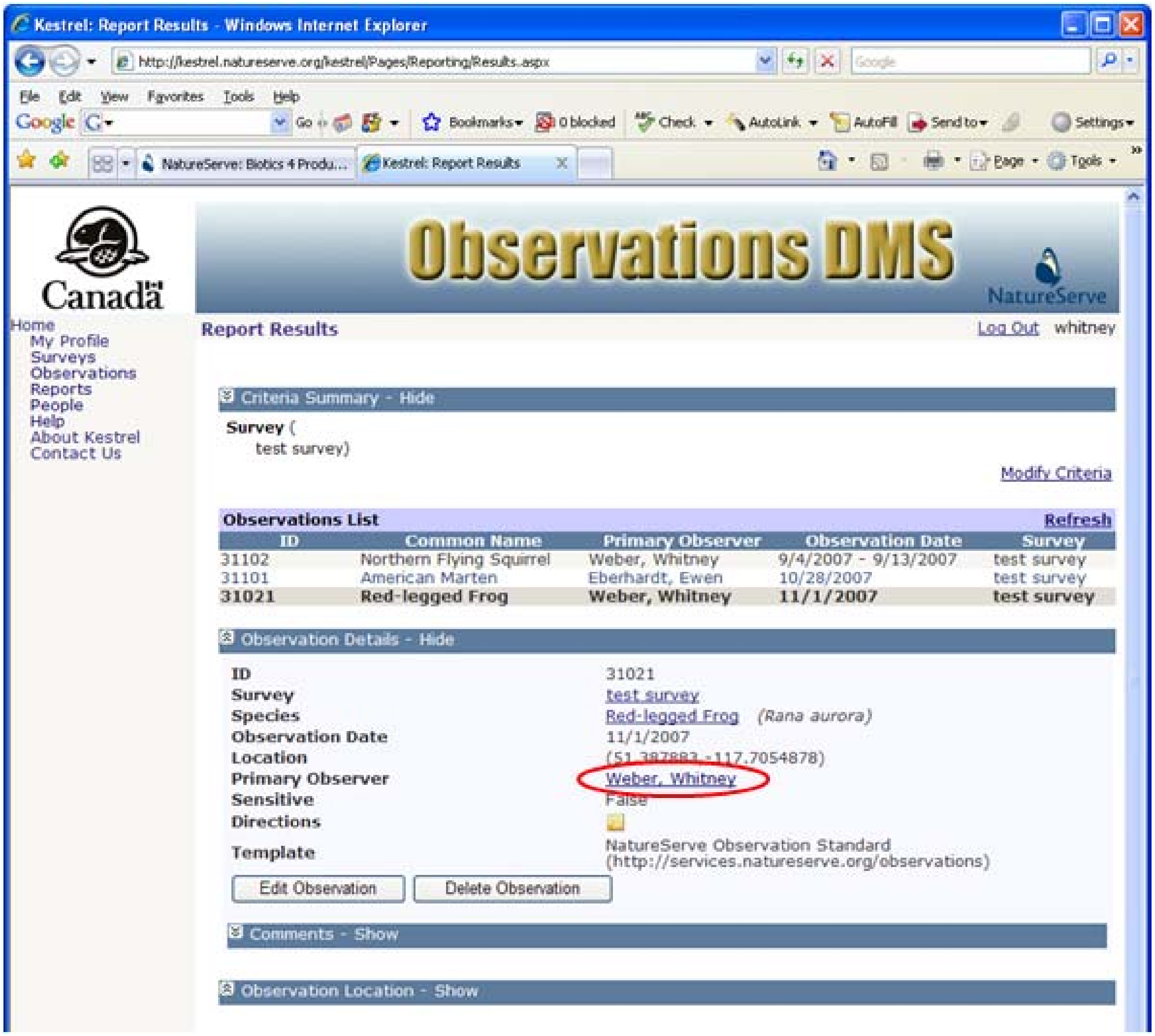
Delete Person

NOTE: A person record cannot be deleted if it is referenced as a Primary Observer within one or more observations or as a Survey Owner. Attempting to delete such a person record will result in the following message:

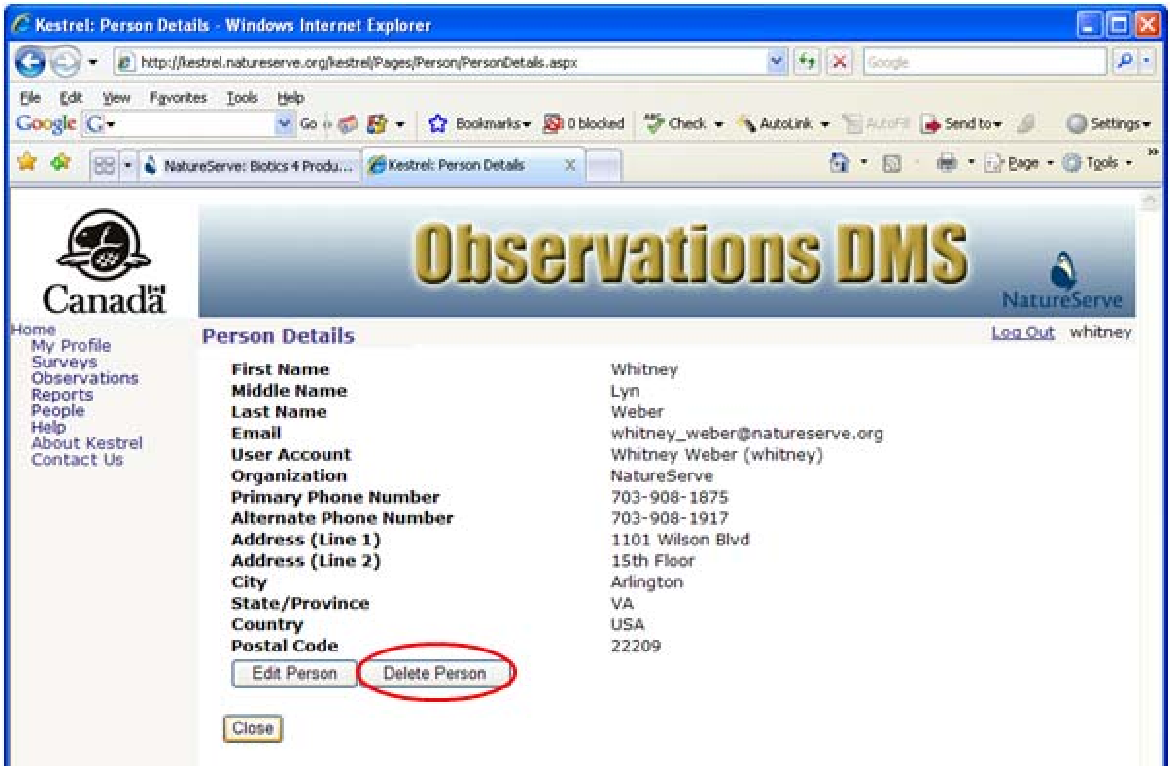
1. Within the *Report Criteria* page, Define Criteria & Generate Report.
2. Within the *Report Results* page, click on the observation record and select **View** from the dropdown list.



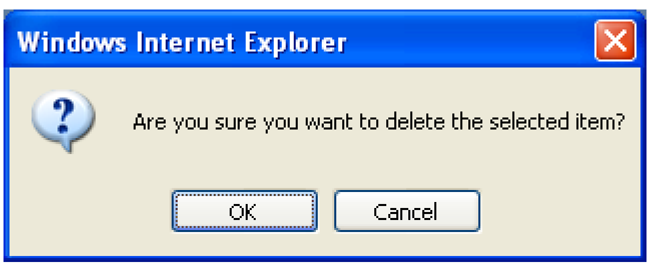
3. From within the Observation Details section, click the Primary Observer link to navigate to the *Person Details* page.



4. Within the *Person Details* page, choose to **Delete Person**.



5. A popup window will prompt you as to whether you truly want to delete the Person. Click **OK** to delete the person or **Cancel** the deletion process.

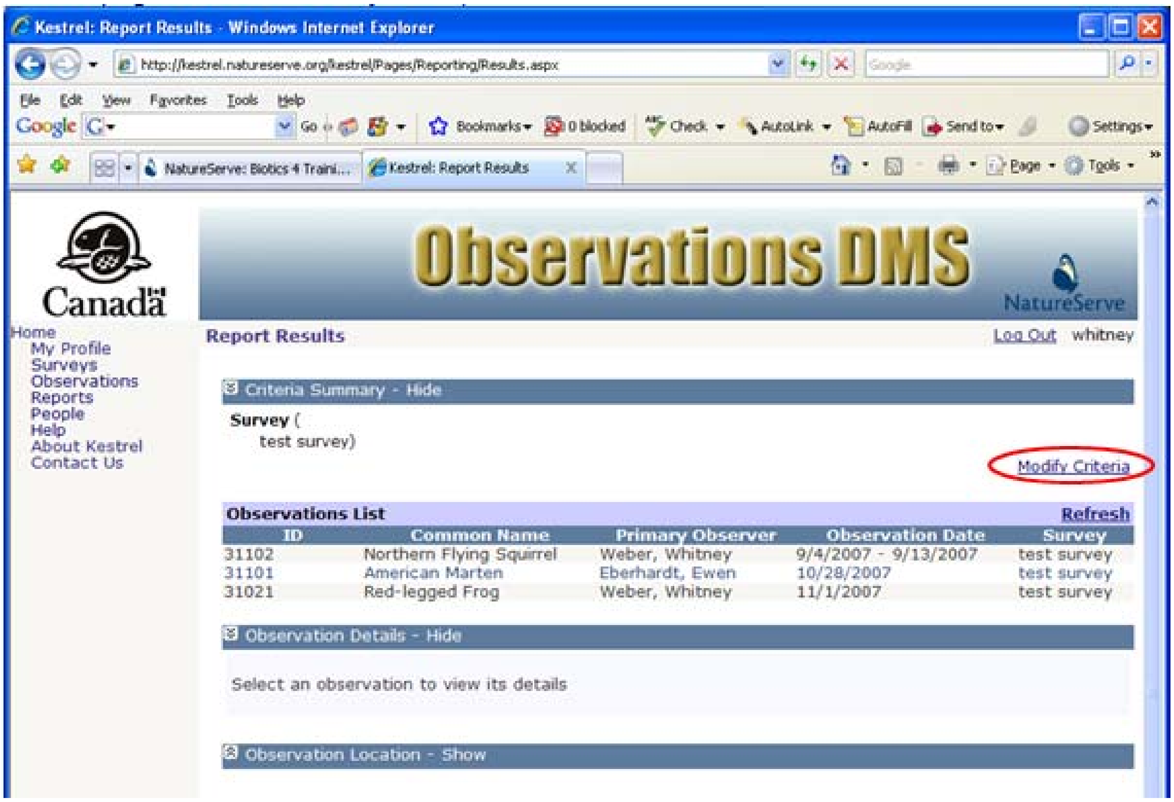


Related Tasks:

- Edit Person

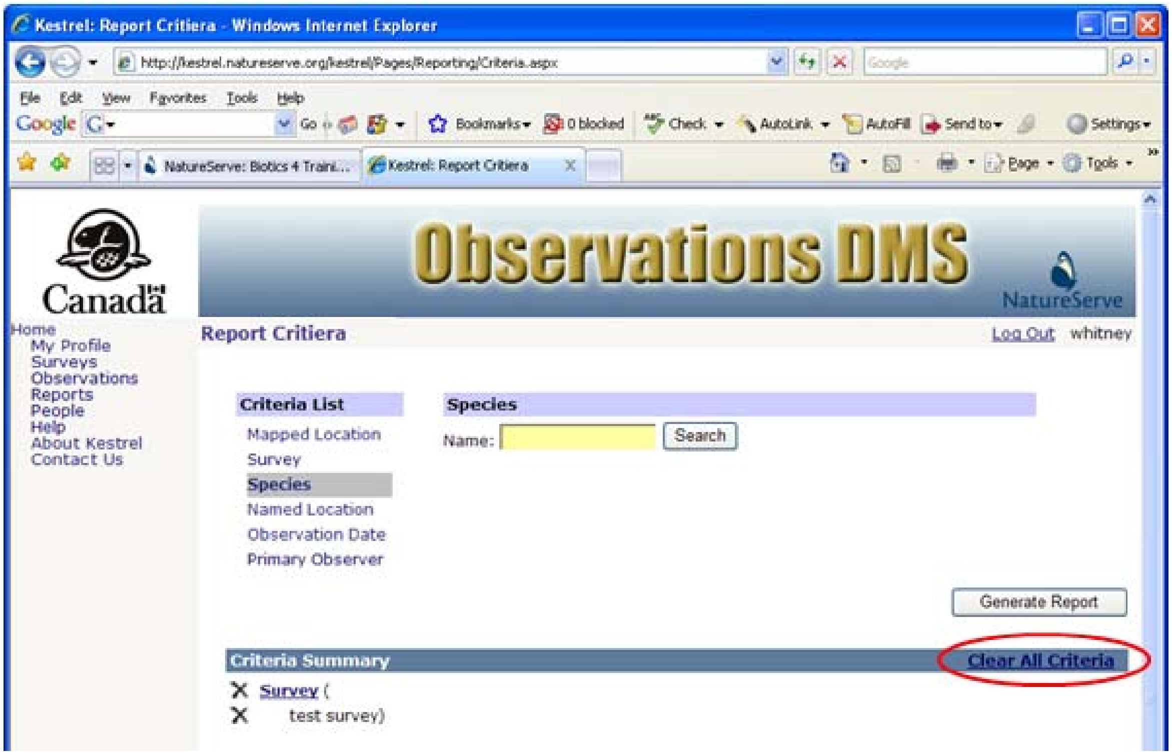
Modify Criteria

1. Within the *Report Criteria* page, [Define Criteria & Generate Report](#).
2. Within the *Report Results* page, click **Modify Criteria**, which will return you to the *Report Criteria* page to further modify the report criteria.

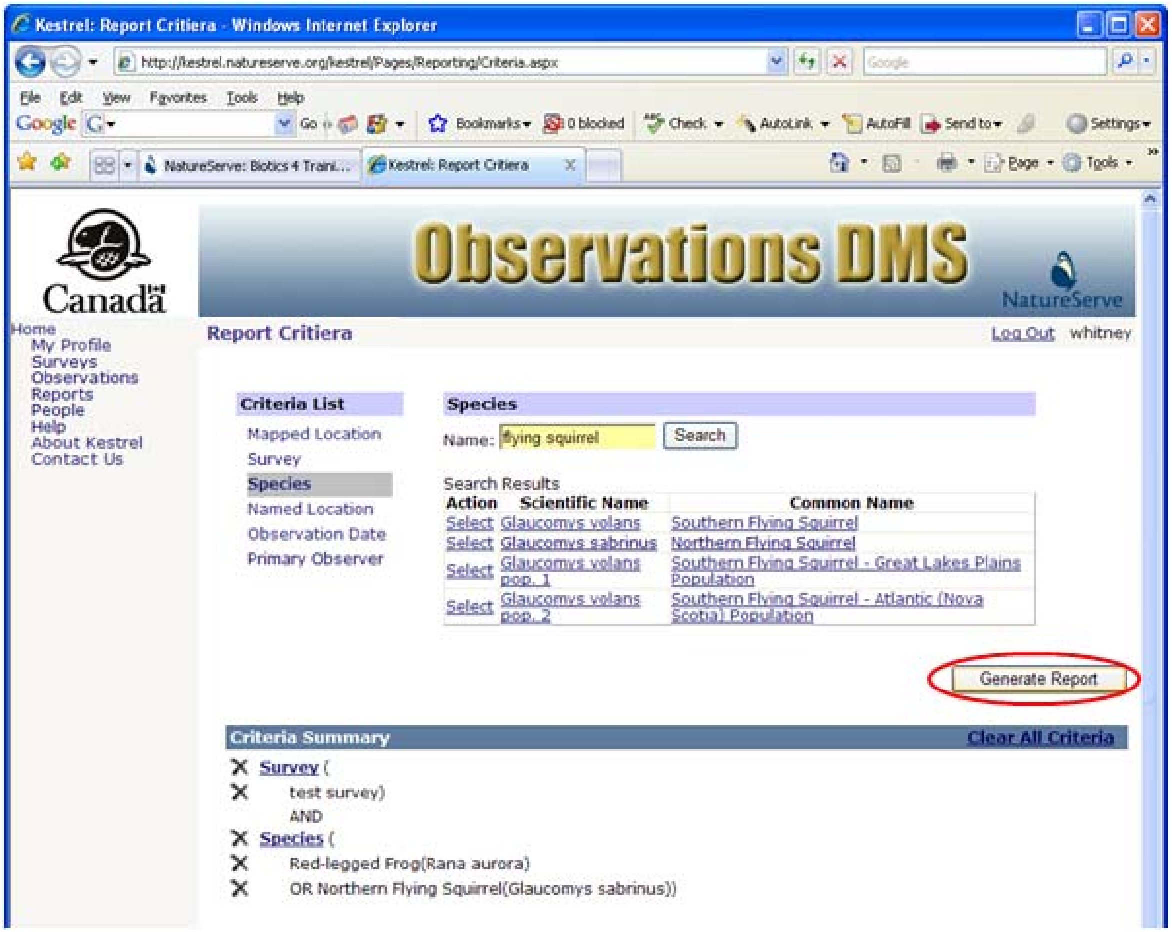


p

3. Within the *Report Criteria* page, as appropriate, [Clear Criteria](#) or add additional criteria via [Define Criteria & Generate Report](#).



4. Once the updated criteria has been defined, **Generate Report**.

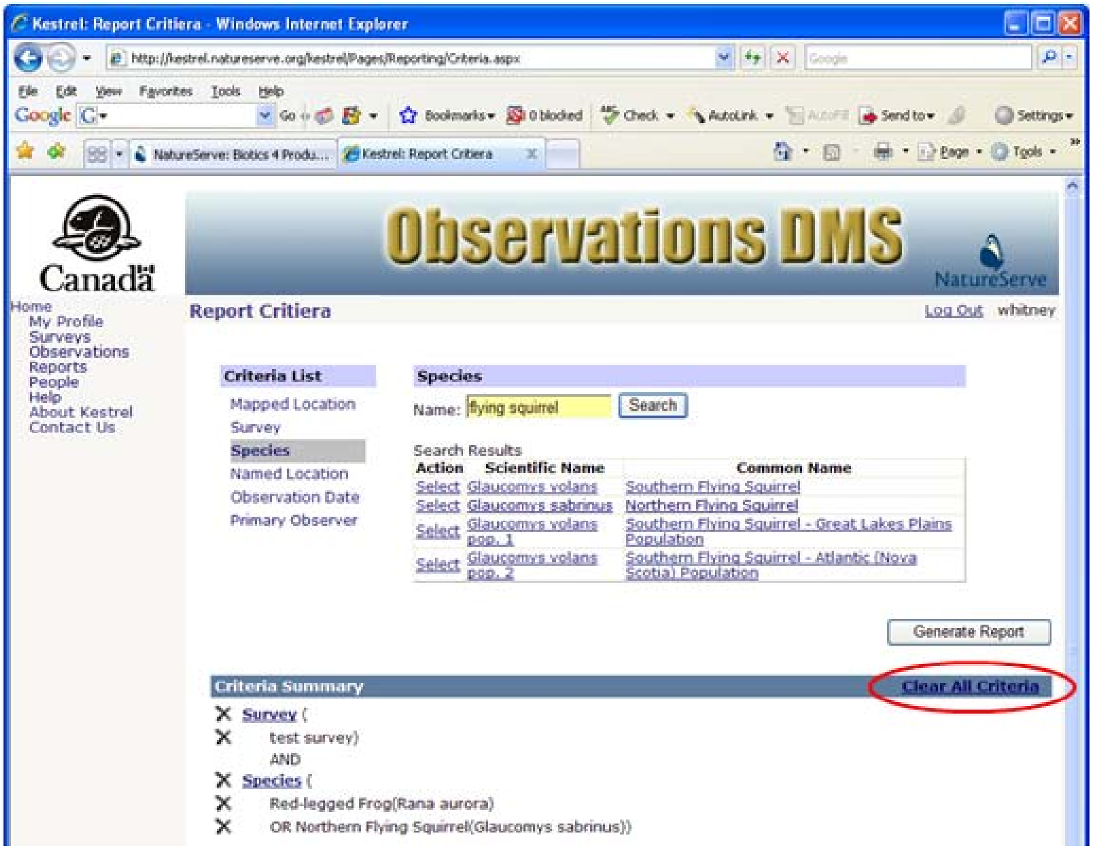


Related Tasks:

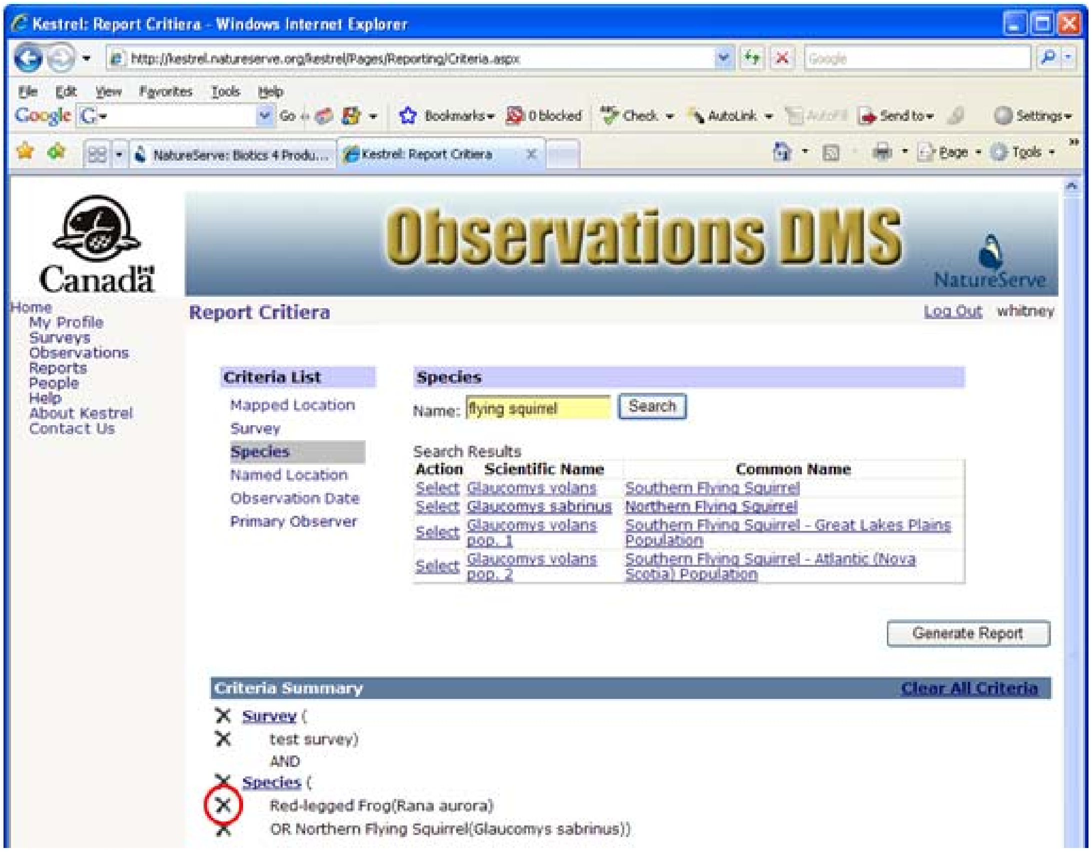
- Define Criteria & Generate Report
- Clear Criteria

Clear Criteria

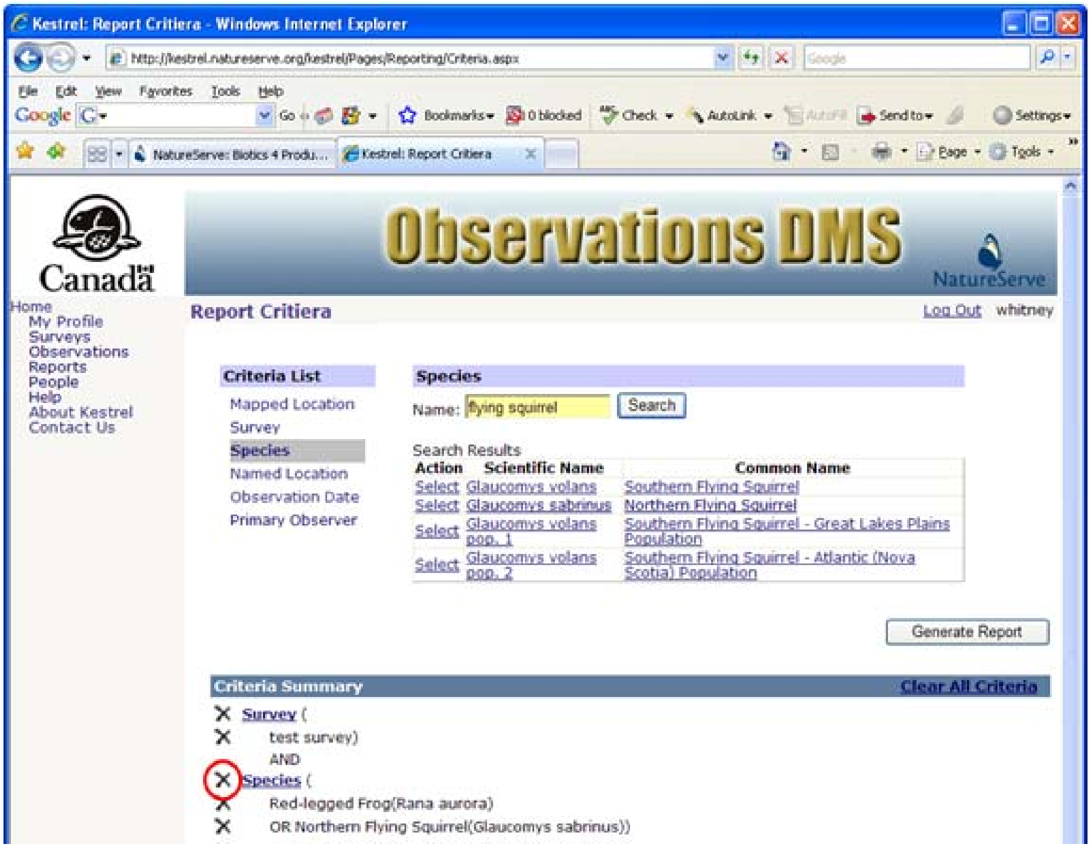
1. Within the *Report Criteria* page, either **Clear All Criteria** or individual criteria values or groups of criteria values.
   - To clear all criteria, select **Clear All Criteria**.



   - To remove a single variable (i.e., Red-legged Frog [*Rana aurora*]) from a criteria group (i.e., Species), click the ✕ next to that single variable.



- To remove a criteria group (i.e., Species), which results in removal of ALL individual criteria variables within that group (i.e., Red-legged Frog AND Northern Flying Squirrel) to be removed as criteria as well, click the next to that criteria group (i.e., Species).



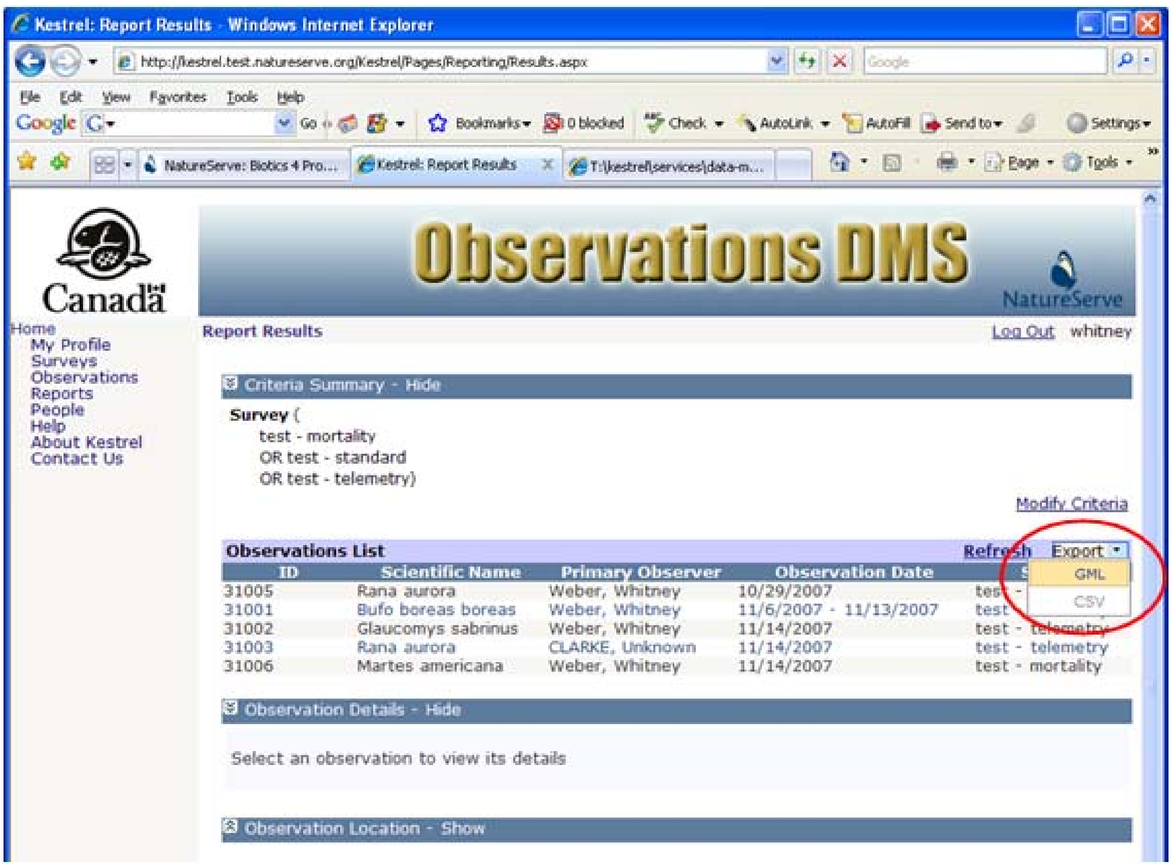
2. After removing the unwanted criteria, either add additional criteria (Define Criteria & Generate Report) or **Generate Report** with the current criteria settings.

Related Tasks:

- Define Criteria & Generate Report

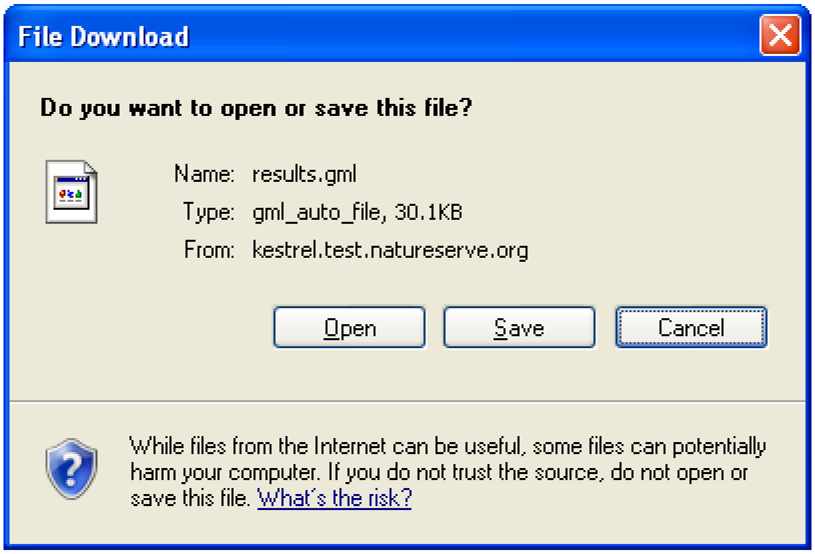
Export Results

1. Within the *Report Criteria* page, Define Criteria & Generate Report.
2. Within the *Report* Results page, click **Export** and select the preferred format (**GML** or **CSV**) from the dropdown list.
    - **GML** - includes tabular and geographic data; can be imported into ArcCatalog to be included in map documents
    - **CSV** - tabular data only; can be imported into a number of applications, including Microsoft Excel and Microsoft Access



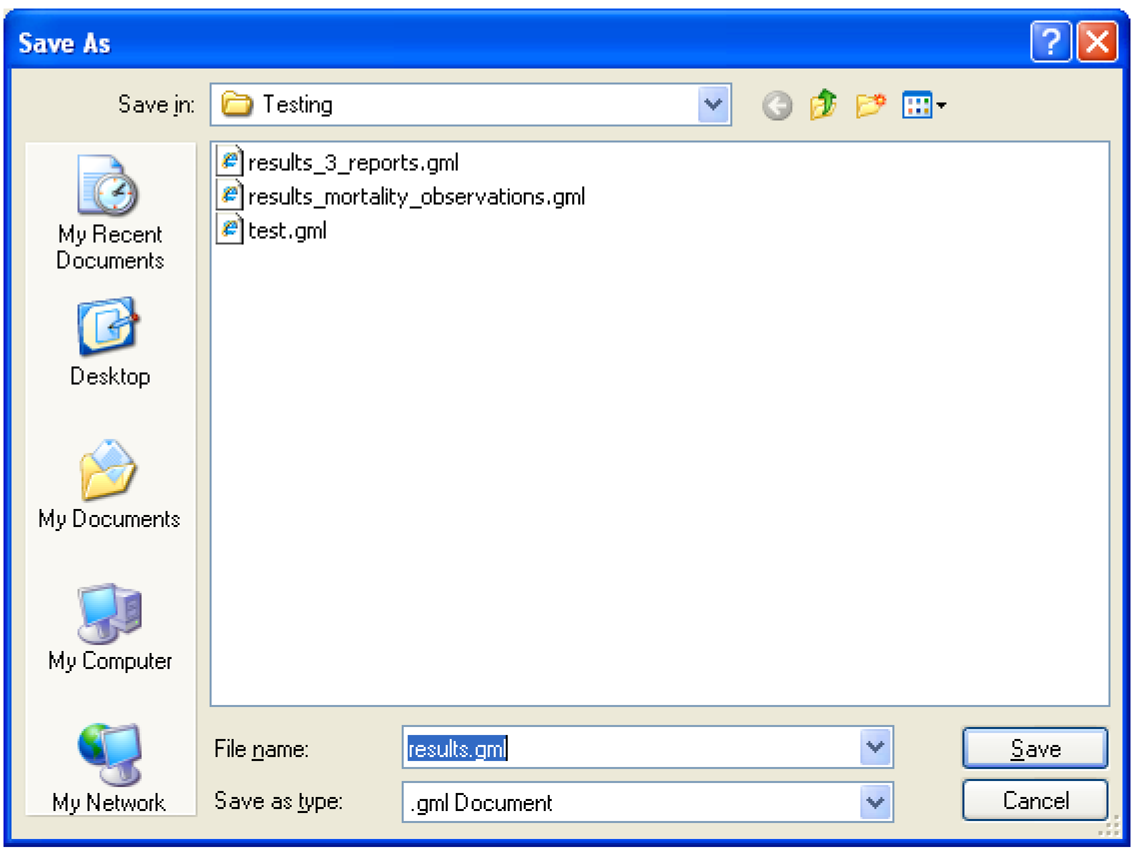
NOTE: Depending on the amount of data, the export process can take a number of minutes.

3. In the *File Download* dialog, **Save** the file.



4. In the *Save As* dialog, navigate to where you would like to save the file.

   NOTE: If ArcMap is not installed on your computer, the **Save as type** will default to a file type of .xml rather than .gml. To save the file with a .gml extension, rename the file by putting quotes around the name (ie. "filename.gml"). Doing so will result in the XML extension being dropped and the file being named filename.gml as expected.

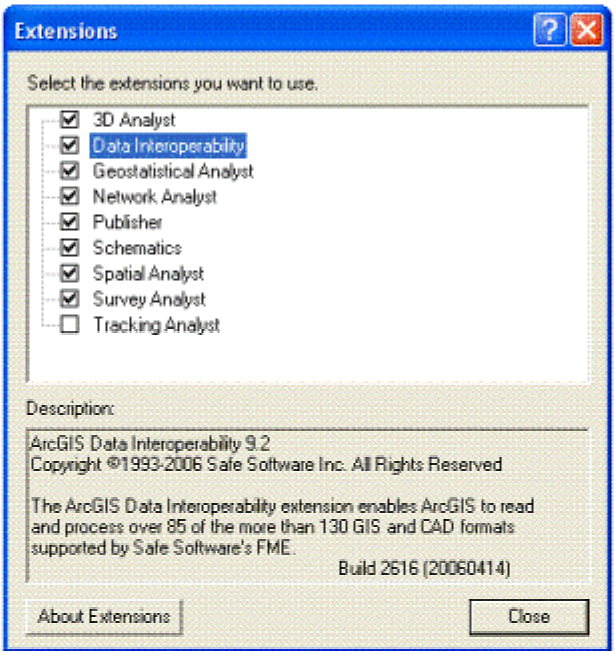


Related Tasks:

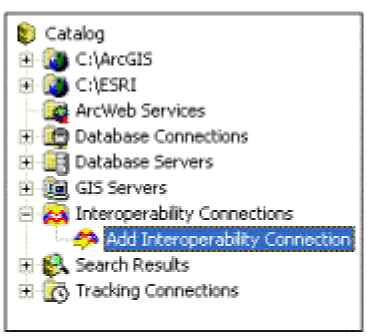
- Define Criteria & Generate Report
- Import GML to ArcCatalog

Import GML to ArcCatalog

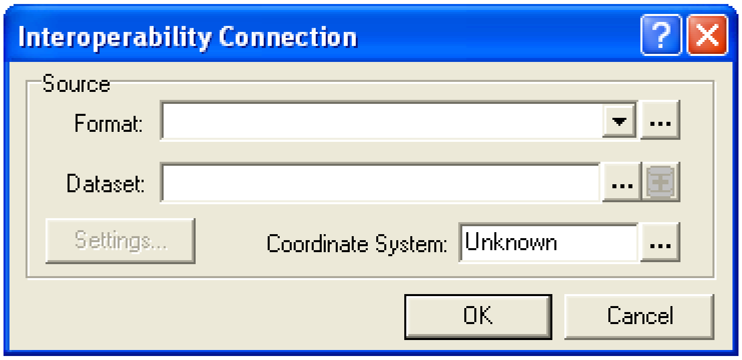
1. In ArcCatalog, enable the Data Interoperability Extension: from the Tools menu, click Extensions and ensure that you have checked Data Interoperability.



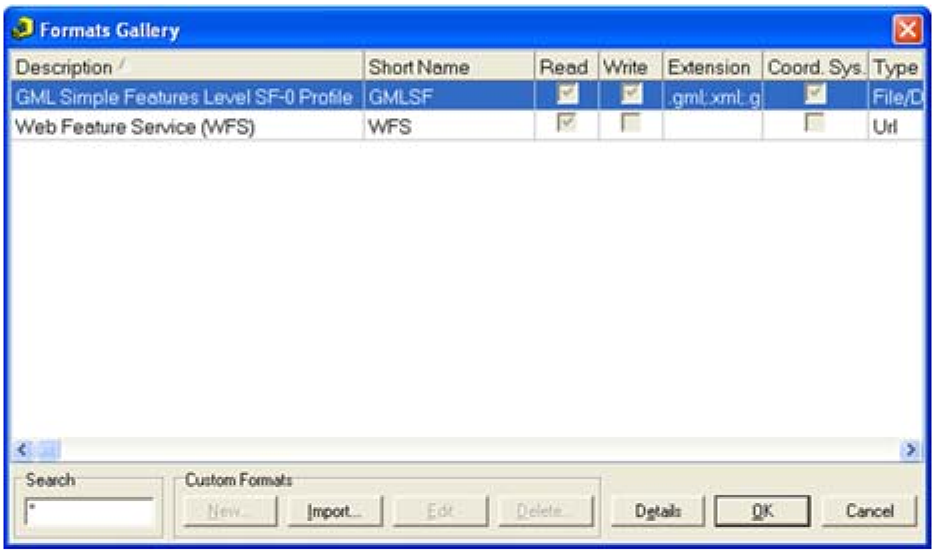
2. Add a new interoperability connection by double-clicking on "Add interoperability connection"



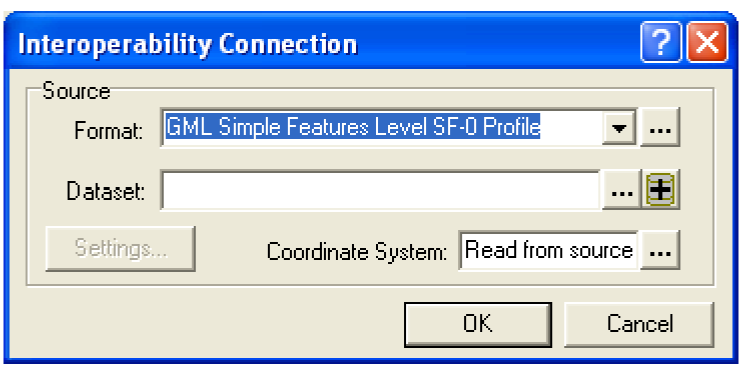
3. Click the browse.png button for Format to open the Formats Gallery.



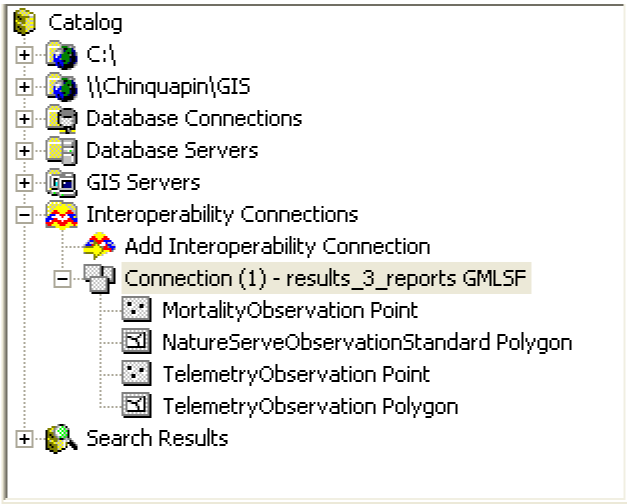
4. Within the Formats Gallery select the GML simple features specification - **GML Simple Features Level SF-0 Profile** and click **OK**.



5. Click the browse.png button for Dataset and navigate to the GML file that you downloaded.



6. Accept the default Coordinate System setting of **Read from Source**.
7. Say **OK**.
8. The dataset can be found in the *Interoperability Connection* section of ArcCatalog and can be loaded into ArcMap like any other dataset.



Related Tasks:

- Export Results

Help

Need help? Following are guidelines for finding the answer, in order of action.

1. **On-line Help**

   Your first line of support should be the Kestrel on-line Help (from the *Help* page, select *Kestrel Help*).

2. **Bridgeweb Knowledge Base**

   If you cannot find answers to your questions in the published documentation, the Bridgeweb Knowledge Base should be your next source of information. All frequently asked questions have been converted into subjects in the Bridgeweb Knowledge Base that can be browsed by all users of the system. Each time we learn something from one of your support tickets that we feel is universally useful, we add it to the Knowledge Base. You can browse the Knowledge Base by subject area or search on keywords. The Knowledge Base includes a section on "Known problems" with which each Kestrel user should become familiar.

3. **Bridgeweb Help Desk**

   All support requests made to NatureServe should originate from you by creating a ticket in the support database. The Bridgeweb Help Desk will help you:

   - Access the Knowledge Base
   - Maintain an online record of your support requests
   - Review support requests made by you as well as others in your program, increasing institutional knowledge
   - Get support as soon as it is available

   The support database helps us:

   - Easily shift support duties among support staff
   - Improve on-site training and training materials to best provide you the information you need to maintain your system

   Please follow the **Guidelines for submitting an informative support issue** below!

   Since the Kestrel support personnel work as a team to address your support issues, you are strongly encouraged to follow these procedures for initiating a support request. Support issues submitted to the Help Desk are accessible to the full support team and are assigned to the most appropriate and available person. Therefore, rather than directly contacting a support team member, we recommend that you submit an issue to the Help Desk. This will ensure that your issues are assigned to the appropriate person and that an e-mail or voicemail does not go unanswered because someone is out of the office or working on another project.

Guidelines for submitting an informative support issue

When you encounter a problem using any of the Kestrel applications, please review the following questions **before** opening an issue in the Help Desk support database. Having this kind of information included in your product support item will help us to understand your problem without having to pester you for more details. You may even be able to solve your own problem!

General information to include:

- The exact error message that you get
- Any screen shots that you can provide
- The chain of events that led up to the unexpected result.
- Specific information about the records that are affected, such as ids, names, locations, values in affected fields, etc.
- Any other thoughts or ideas you might have as to what might be causing the problem. Your observations are helpful and often put us on the right path to solving it.

Did the system crash, send an error message, or do something unexpected? If so, please provide the following information:

- Does this happen every time I do this same transaction or just intermittently?
- Does this happen to any kind of record (Survey, Observation, Person, etc.) or just a specific type of record?
- Does this happen with every record of this record type (every EO, every EST, every MA, etc.) or just with one or a few specific records?
- Does this happen with every field in that record or is it just a particular field that is causing the error? Example: updates to the survey name field causes an error, but other fields are okay.
- If it's just a few specific records, what could be special about these records? Note the record ids.
    - Were they newly created?
    - Were they newly updated?
    - Is there anything that these records could have in common
- What actions did I perform just before this result happened? The exact workflow that led up to the problem is one of the most important pieces of information we can have (e.g., I clicked the Edit Observation button in the Observation Details section, I edited field xxx, I saved the record using, etc.)
- Am I following the correct procedure for what I'm trying to accomplish? Check the online Help if you're not sure.