

Kestrel Help v1017

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About This Help

This help was created by NatureServe to accompany the Kestrel data management system.

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Kestrel version 1.0.17

Kestrel Help 2010-03-15

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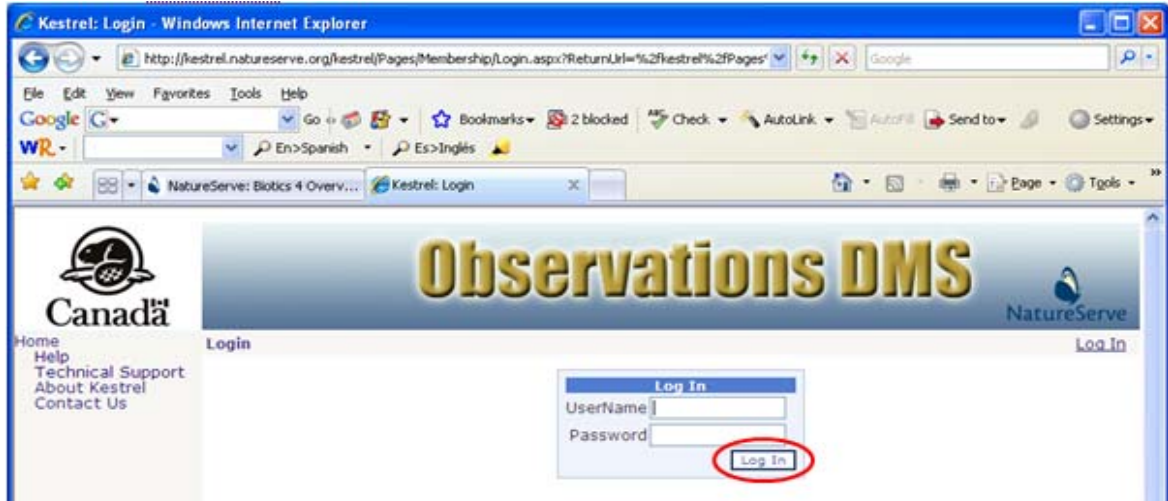
Tutorial

- [Log In](#)
- [Create New Observation](#)
 - [Select a Species](#)
 - [Create New Location](#)
 - [Use Mapping Tools](#)
 - [Select Primary Observer](#)
- [View Observation](#) that you created
- [Edit Observation](#) that you created
- [Export Observations](#)
- [Create New Survey](#)
 - [Configure Survey Options](#)
 - [Download Spreadsheet Template](#)
 - [Import Observations from Spreadsheet](#)
 - [Download Processed Spreadsheet](#)
 - [Download Geodatabase Template](#)
 - [Import Observations from Geodatabase Recordset](#)
 - [Download Processed Geodatabase XML Workset](#)
- [Define Report Criteria & Generate Report](#)
- [View Observation](#) for one of the observations in the report
- [Modify Criteria](#) of the report and then [Generate Report](#)
- [Export Results](#) of the report
- [Get technical support or submit an error/bug/request](#)
 - What Knowledge Base article # contains information on Kestrel Administrators?

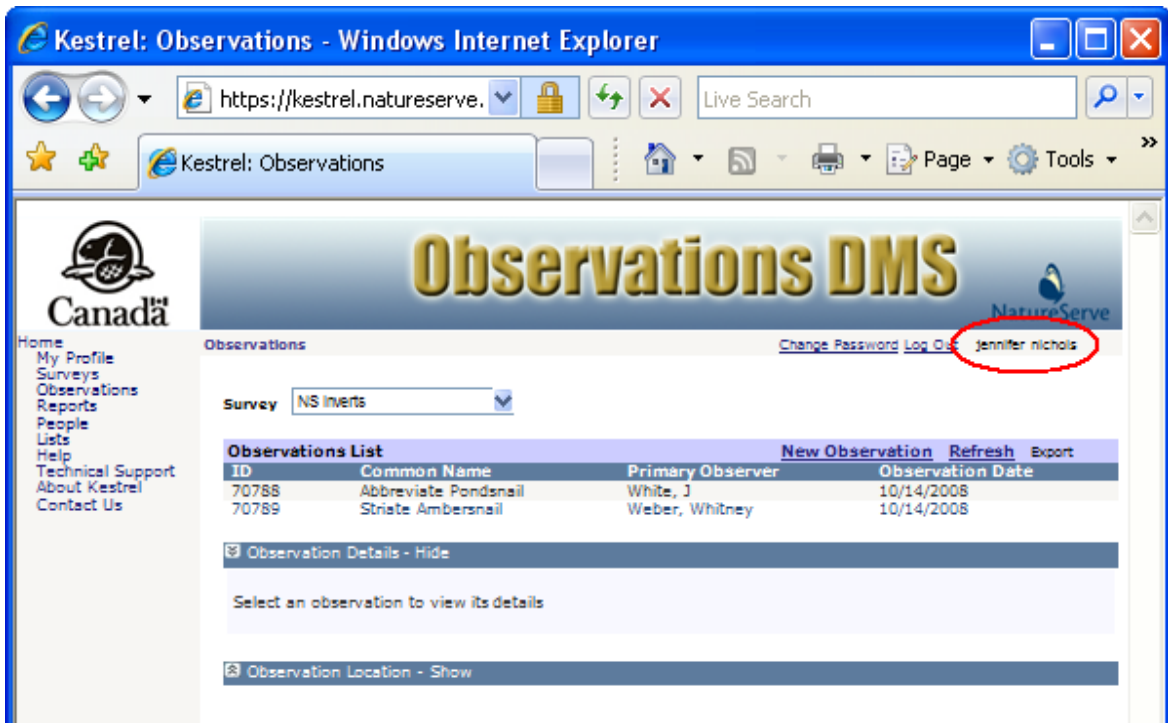
Log In

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:

- [Create New Person](#)
- [Create User Account](#)
- [Edit Person](#)
- [Change Password](#)
- [Log Out](#)

Log Out

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

Observations

Change Password **Log Out** Jennifer nichols

Survey: NS Inverts

ID	Common Name	Primary Observer	Observation Date
70788	Abbreviate Pondsnail	White, J	10/14/2008
70789	Striate Ambersnail	Weber, Whitney	10/14/2008

Observation Details - Hide

Select an observation to view its details

Observation Location - Show

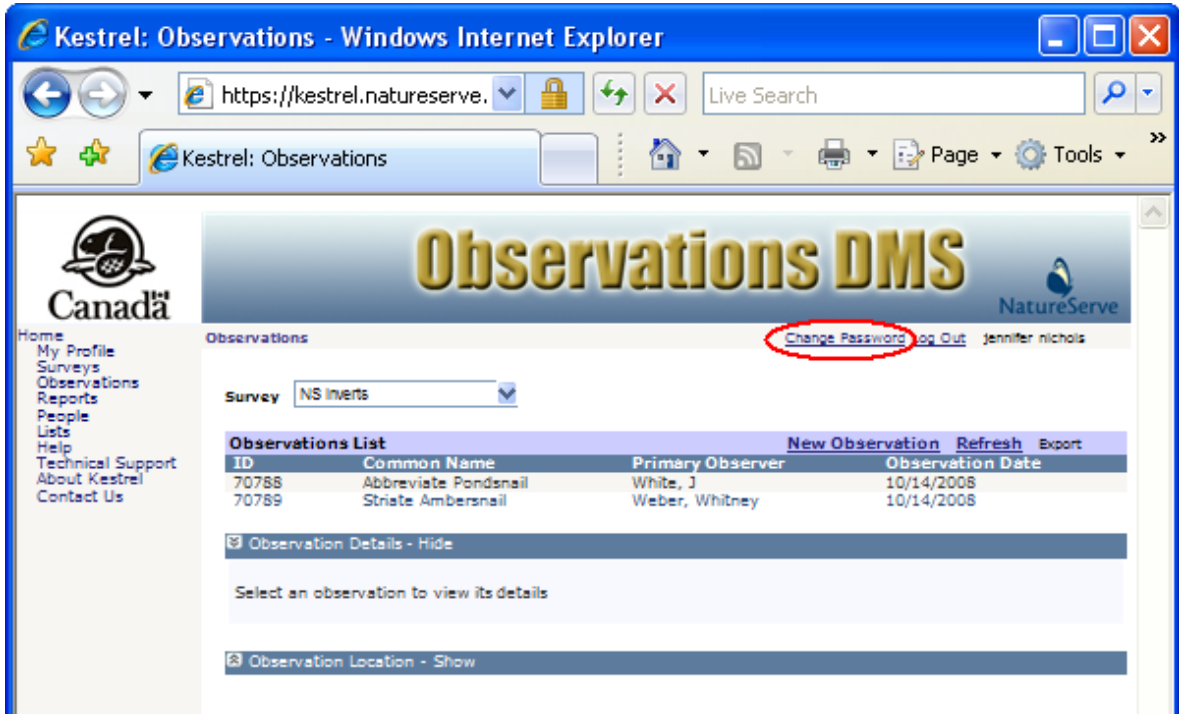
Related Tasks:

- [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.

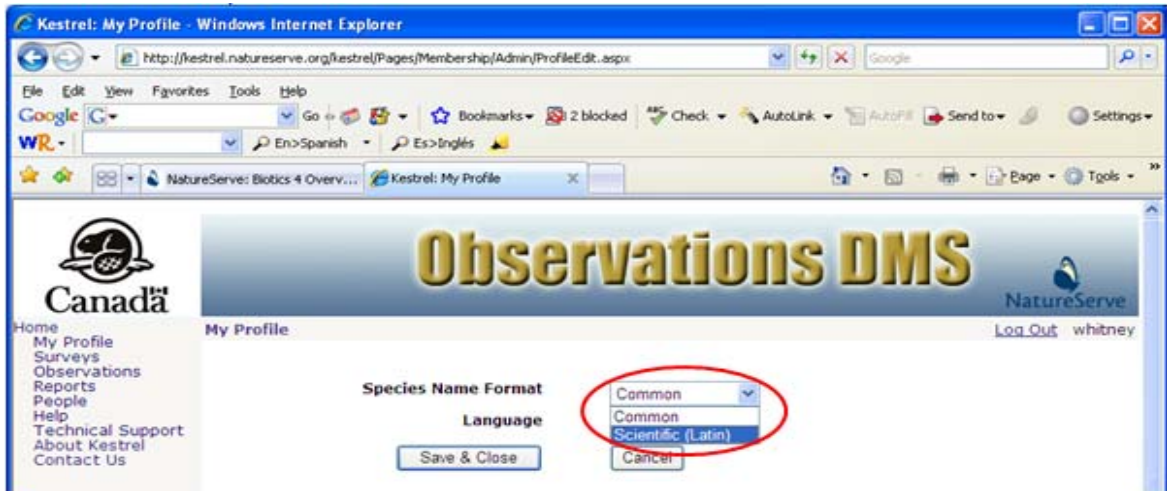
Tasks:

- [Set Species Name Format](#)
- [Set Language Preference](#)
- [Set Survey Preference](#)

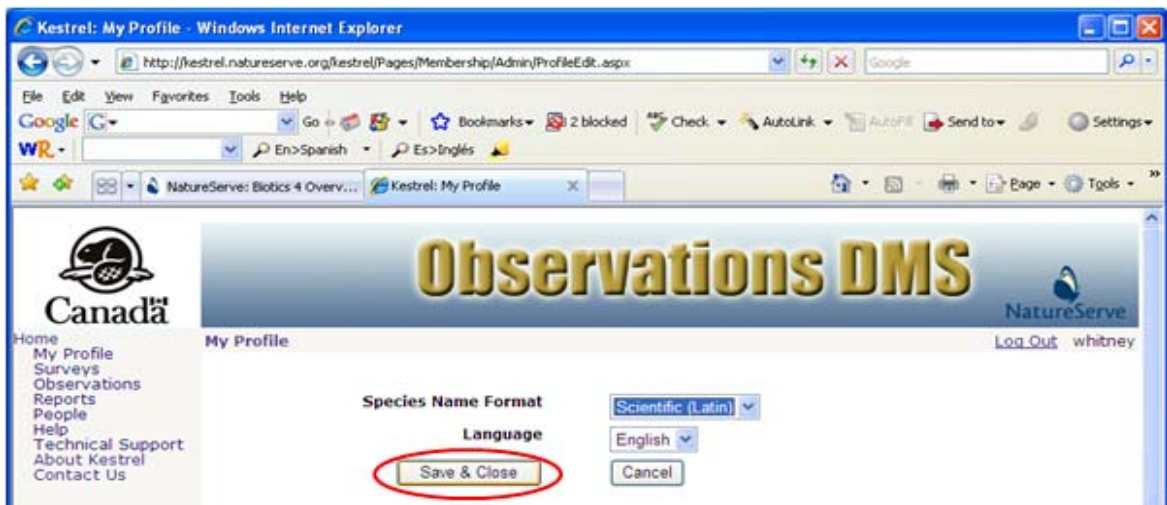
Tasks

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.

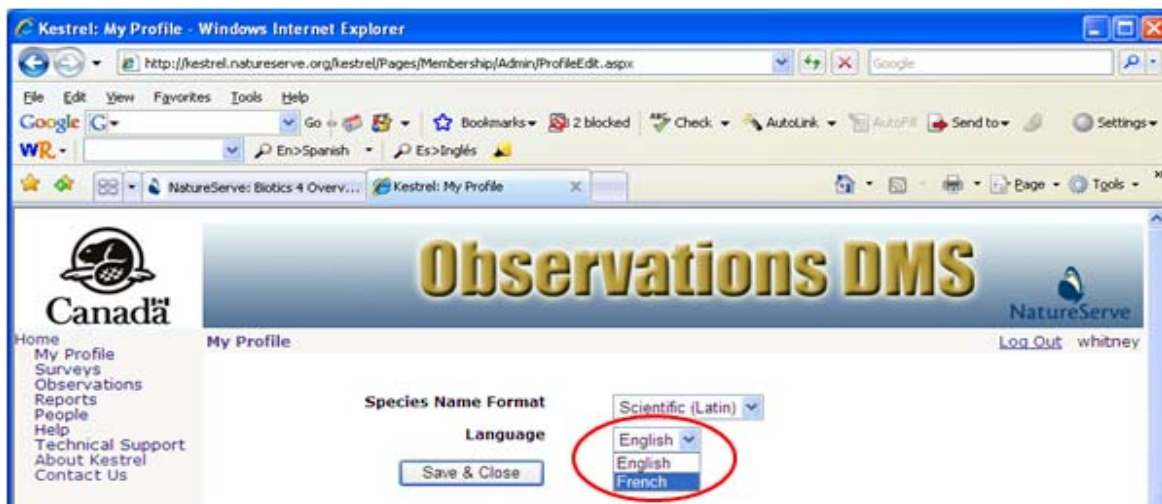


Related Tasks:

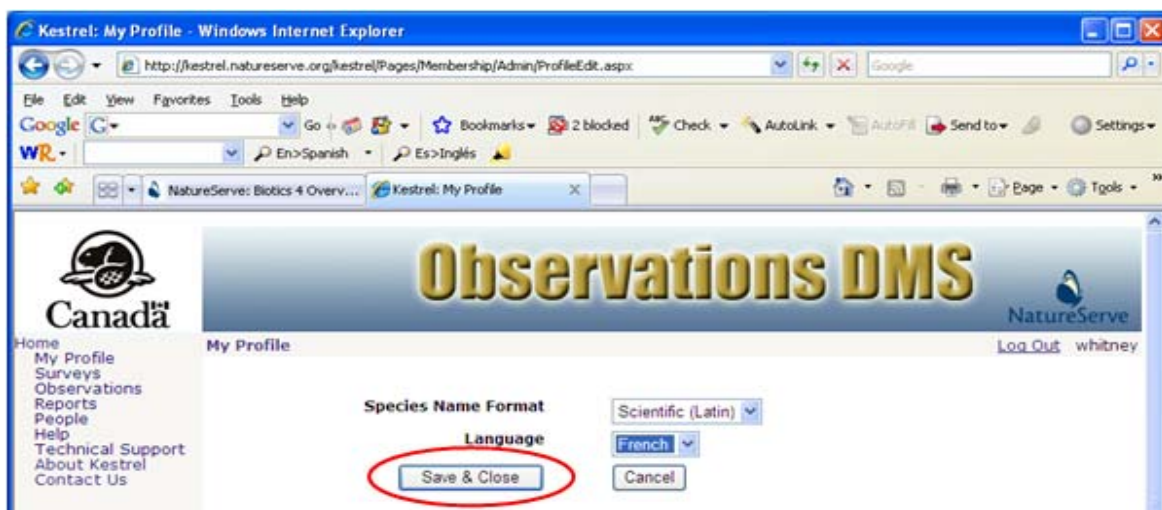
- [Set Language Preference](#)
- [Set Survey Preference](#)

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

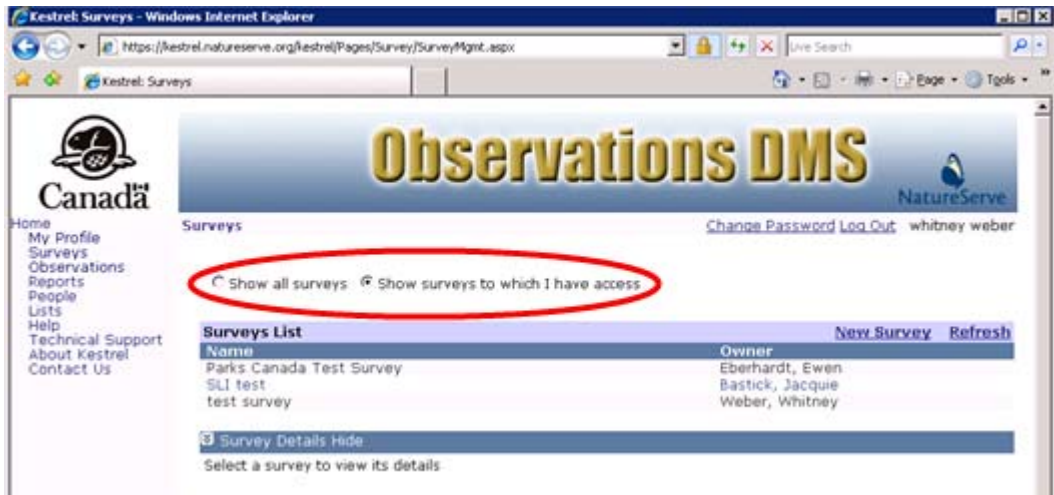
Tasks:

- [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](#)

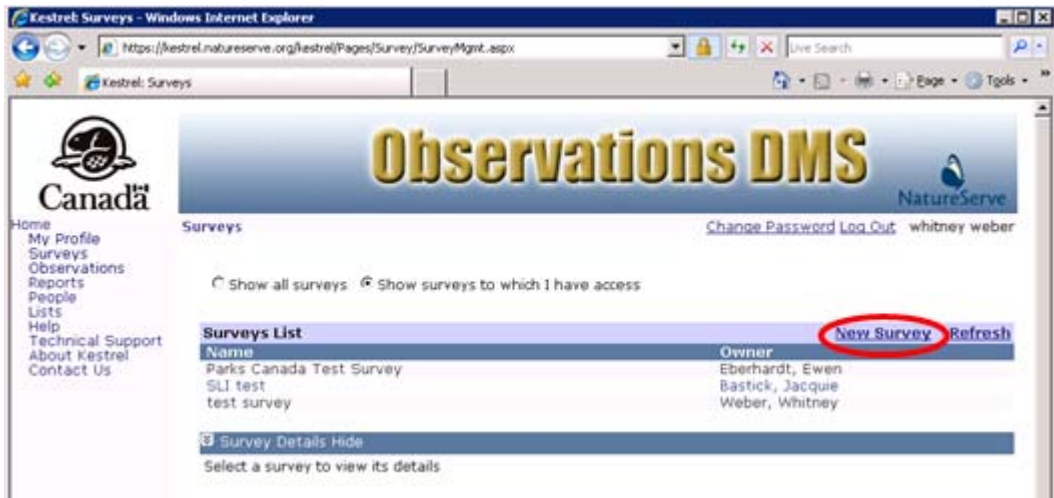
Methods of Navigation:

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

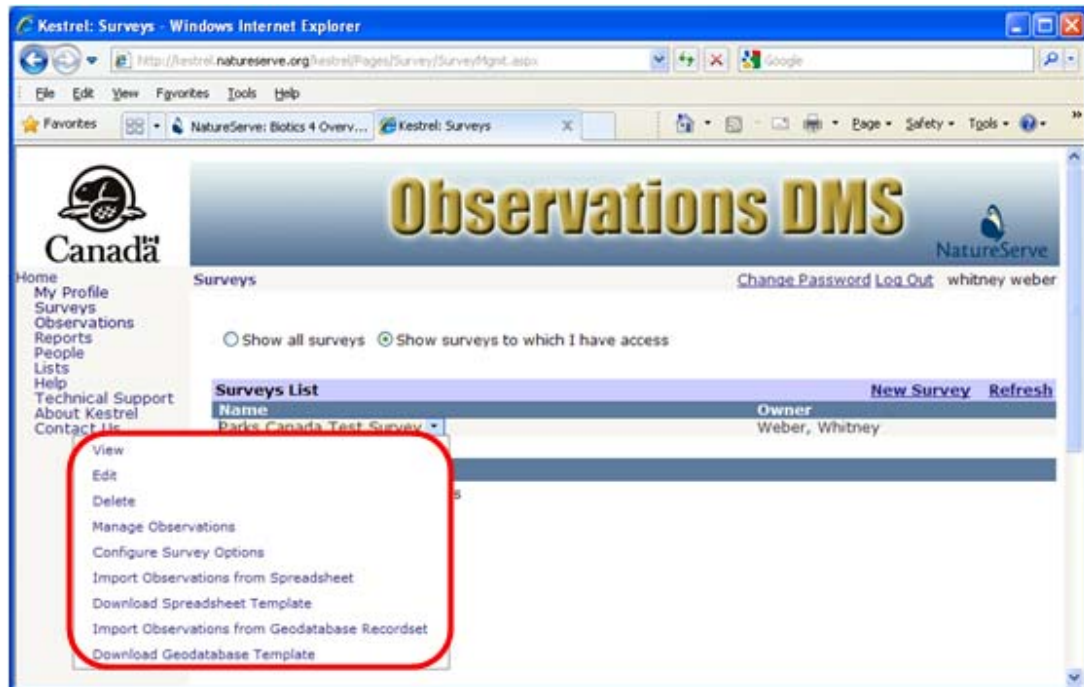
- Whether all surveys are displayed by default within the *Surveys* page, or just those to which you have been granted privileges, depends on your [Survey Preference](#) within *My Profile*. Click the **Show all surveys** radio button to see all surveys or **Show surveys to which I have access** to filter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

Kestrel: Surveys - Windows Internet Explorer

http://kestrel.natureserve.org/kestrel/Pages/Survey/SurveyMgmt.aspx

File Edit View Favorites Tools Help

Home My Profile Surveys Observations Reports People Lists Help Technical Support About Kestrel Contact Us

Observations DMS

Change Password Log Out whitney weber

Surveys

Show all surveys Show surveys to which I have access

Surveys List		New Survey	Refresh
Name	Owner		
Parks Canada Test Survey	Weber, Whitney		

Survey Details Hide

Survey Name Parks Canada Test Survey

Survey Owner [Weber, Whitney](#)

Created By Whitney Weber (whitney weber)

Date Created 3/10/2010

Last Modified By Whitney Weber (whitney weber)

Last Modified 3/10/2010

Species Values: **Auto-Generated**

Location Values: **Auto-Generated**

Primary Observer Values: **Auto-Generated**

Observation Template Nat (ht

[Edit Survey](#) [Delete Survey](#) [More Options](#)

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

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

The screenshot shows the 'Edit Survey' interface for 'Parks Canada Test Survey'. The page includes a navigation menu on the left with links like Home, My Profile, Surveys, Observations, Reports, People, Lists, Help, Technical Support, About Kestrel, and Contact Us. The main content area is titled 'Survey Information' and contains the following fields:

- 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:** NatureServe Observation Standard
- Authorized Users:** A list including Allen, Dizan; Allen, Martha; Ashley, Paul; Austin, Deborah; and Ayles, Paul.

At the bottom, there are three buttons: 'Save & Close', 'Cancel', and 'Delete'. The 'Delete' button is highlighted with a red rectangular box.

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_I

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:

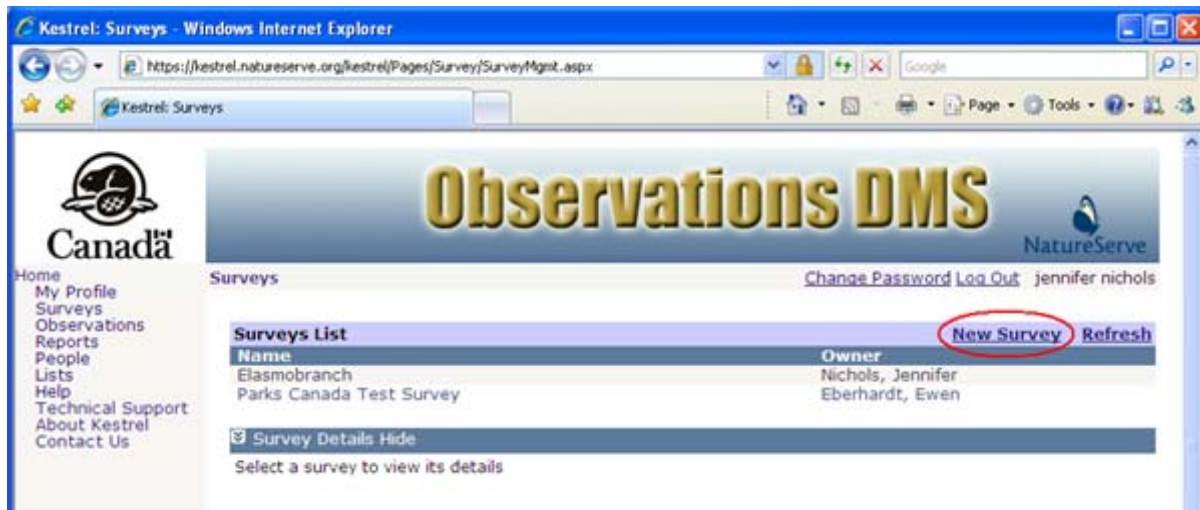
Column Name:

Display Column:

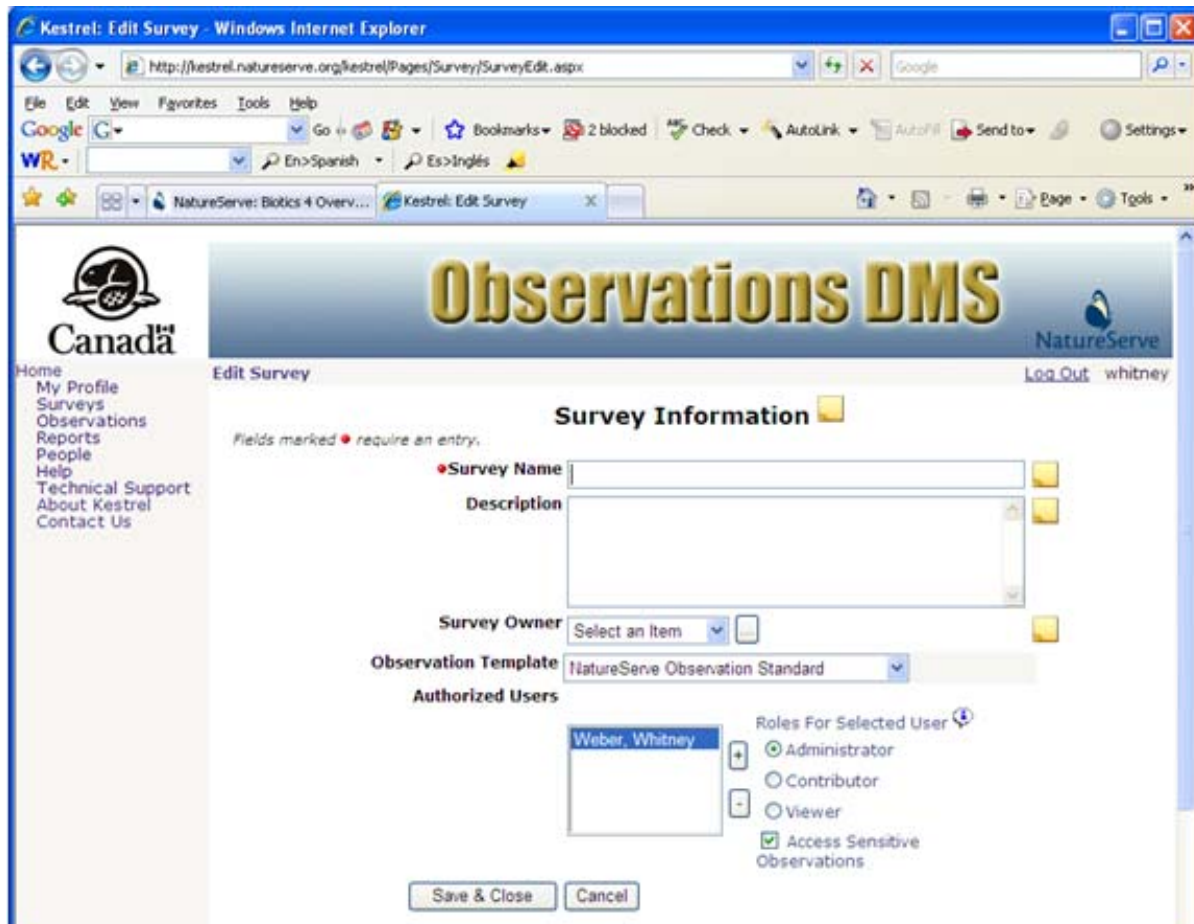
Tasks

Create New Survey

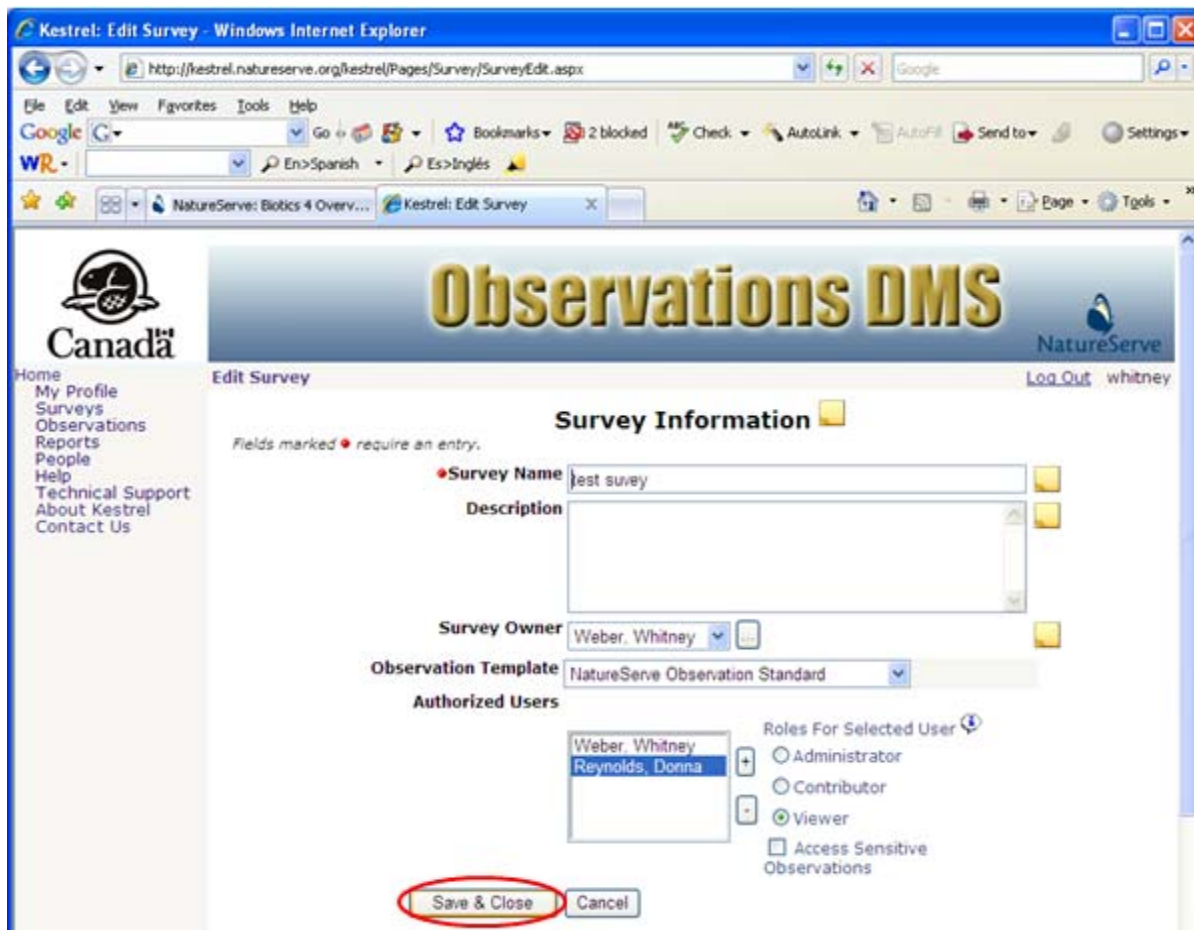
1. Within the *Surveys* page, click the **New Survey** link.



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.

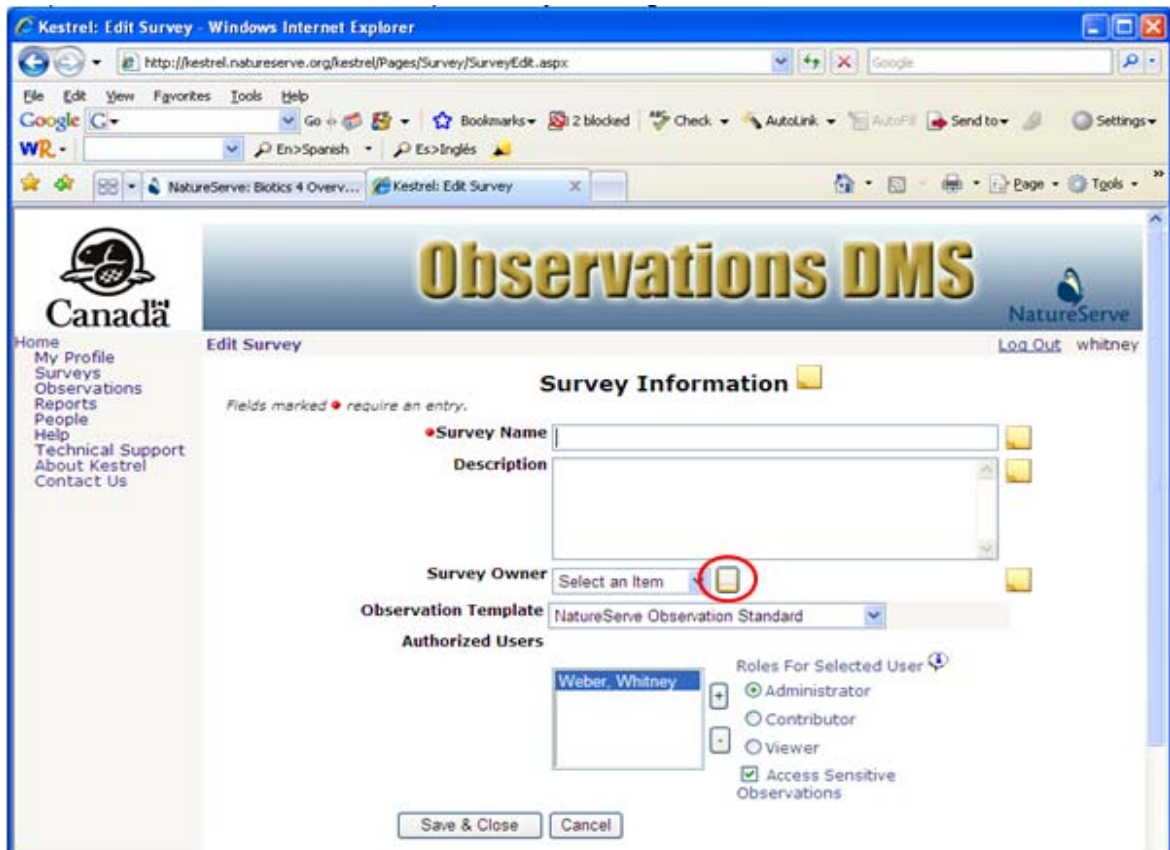


Related Tasks:

- [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.



The screenshot shows the 'Edit Survey' page in Internet Explorer. The page title is 'Observations DMS' and the URL is 'http://kestrel.natureserve.org/kestrel/Pages/Survey/SurveyEdit.aspx'. The 'Survey Information' section contains the following fields:

- Survey Name:** A text input field.
- Description:** A text area.
- Survey Owner:** A dropdown menu with 'Select an Item' and a dropdown arrow icon circled in red.
- Observation Template:** A dropdown menu with 'NatureServe Observation Standard' selected.

Below the 'Survey Owner' dropdown is a list of authorized users, with 'Weber, Whitney' selected. To the right of this list is a 'Roles For Selected User' section with the following options:

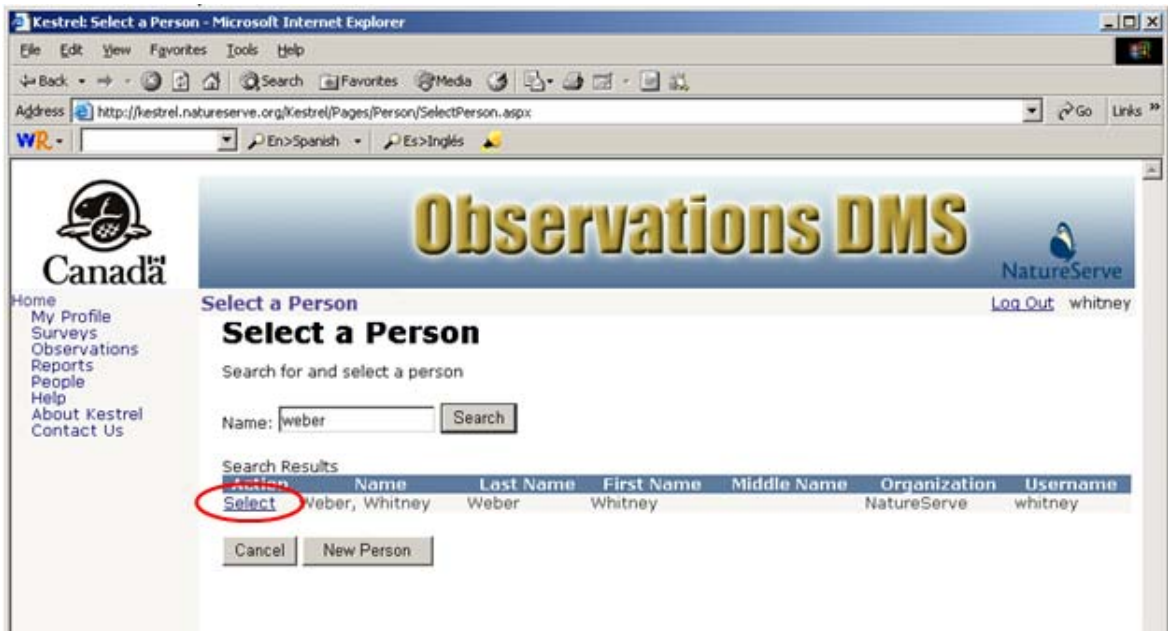
- Administrator
- Contributor
- Viewer
- Access Sensitive Observations

At the bottom of the form are 'Save & Close' and 'Cancel' buttons.

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.

Kestrel: Edit Survey - Windows Internet Explorer

http://kestrel.natureserve.org/kestrel/Pages/Survey/SurveyEdit.aspx

File Edit View Favorites Tools Help

Google

Go

Bookmarks

2 blocked

Check

AutoLink

AutoFill

Send to

Settings

WR

En>Spanish

Es>Ingles

NatureServe: Biotics 4 Overv...

Kestrel: Edit Survey

Home

My Profile

Surveys

Observations

Reports

People

Help

Technical Support

About Kestrel

Contact Us

Canada

Observations DMS

NatureServe

Log Out whitney

Edit Survey

Survey Information

Fields marked ● require an entry.

● Survey Name

Description

Survey Owner Weber, Whitney

Observation Template NatureServe Observation Standard

Authorized Users

Weber, Whitney

Roles For Selected User

Administrator

Contributor

Viewer


Access Sensitive Observations

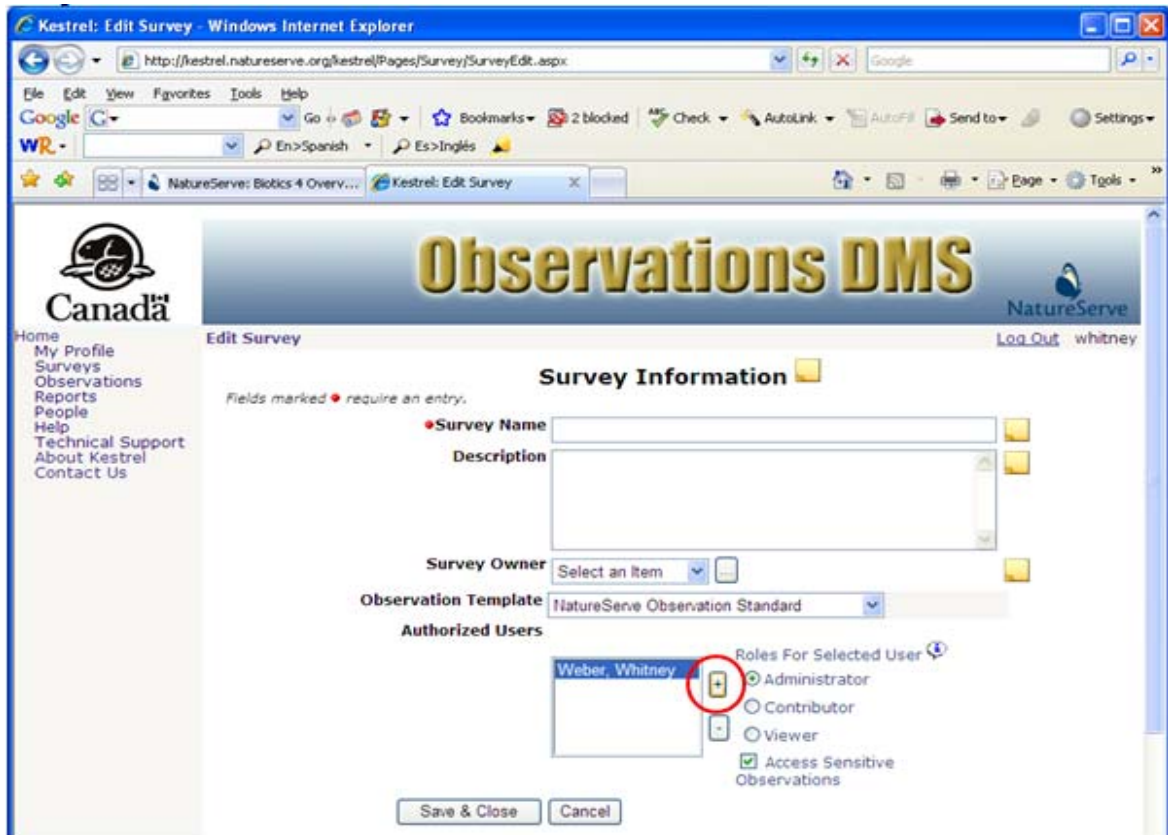
Save & Close Cancel

Related Tasks:

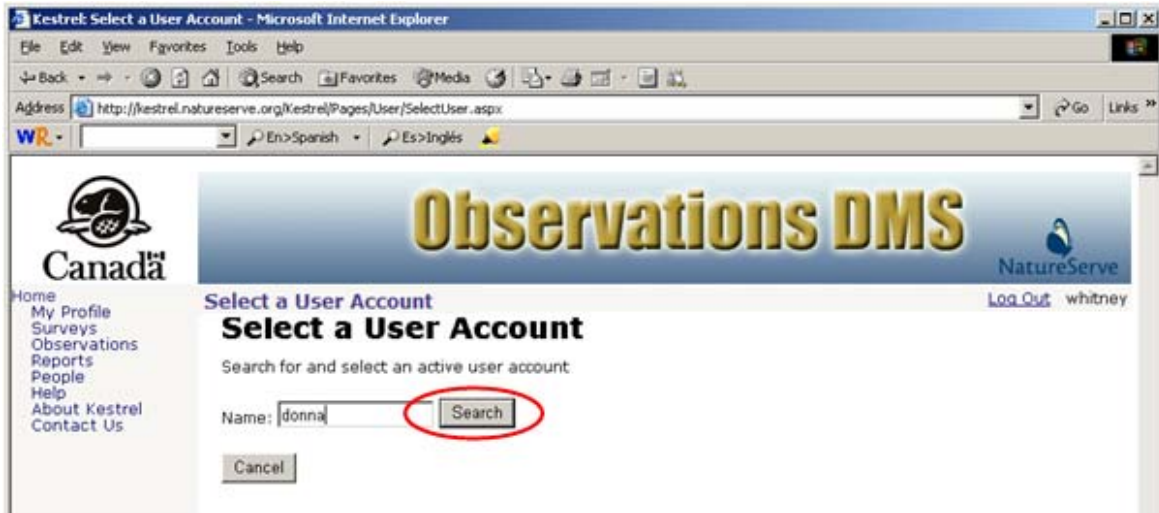
- [Create New Person](#)
- [Create New Survey](#)
- [Edit Survey](#)

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.")



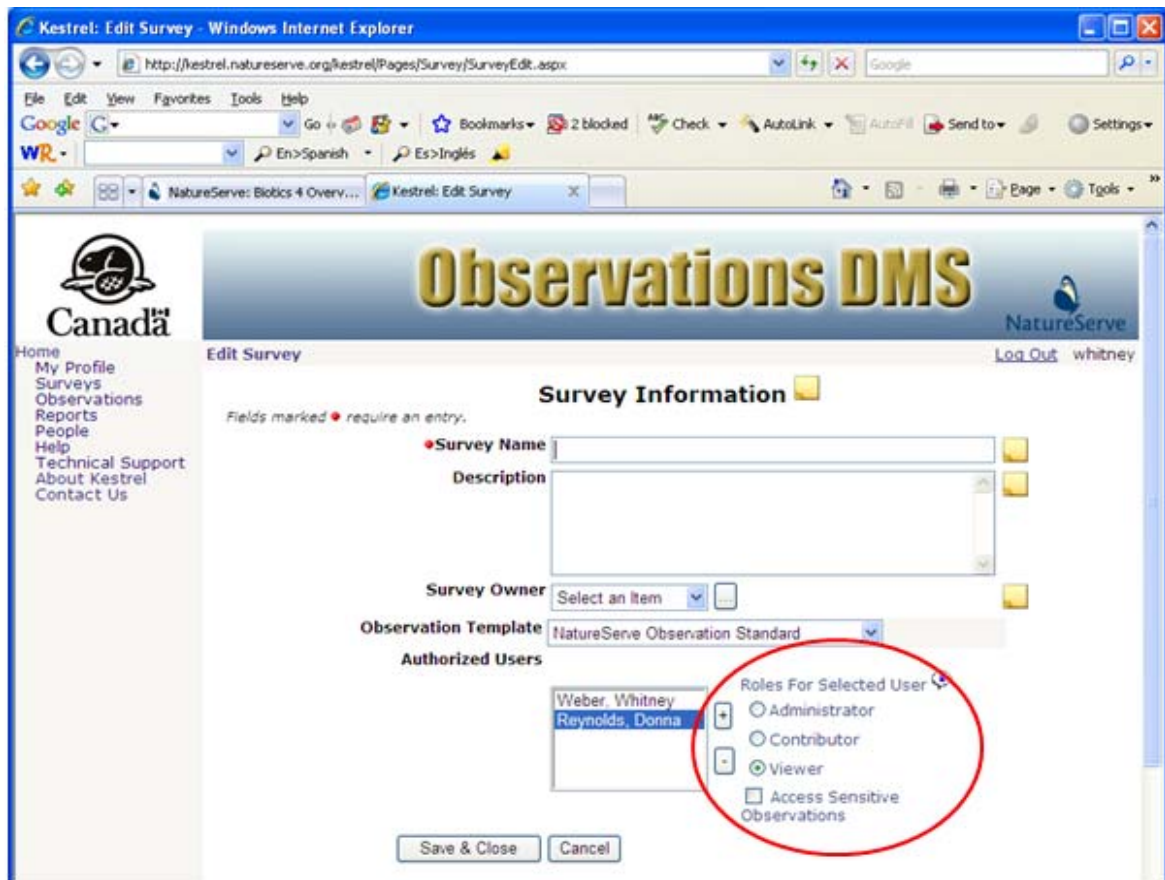
3. **Select** the appropriate user from the Search Results Section.



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;

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




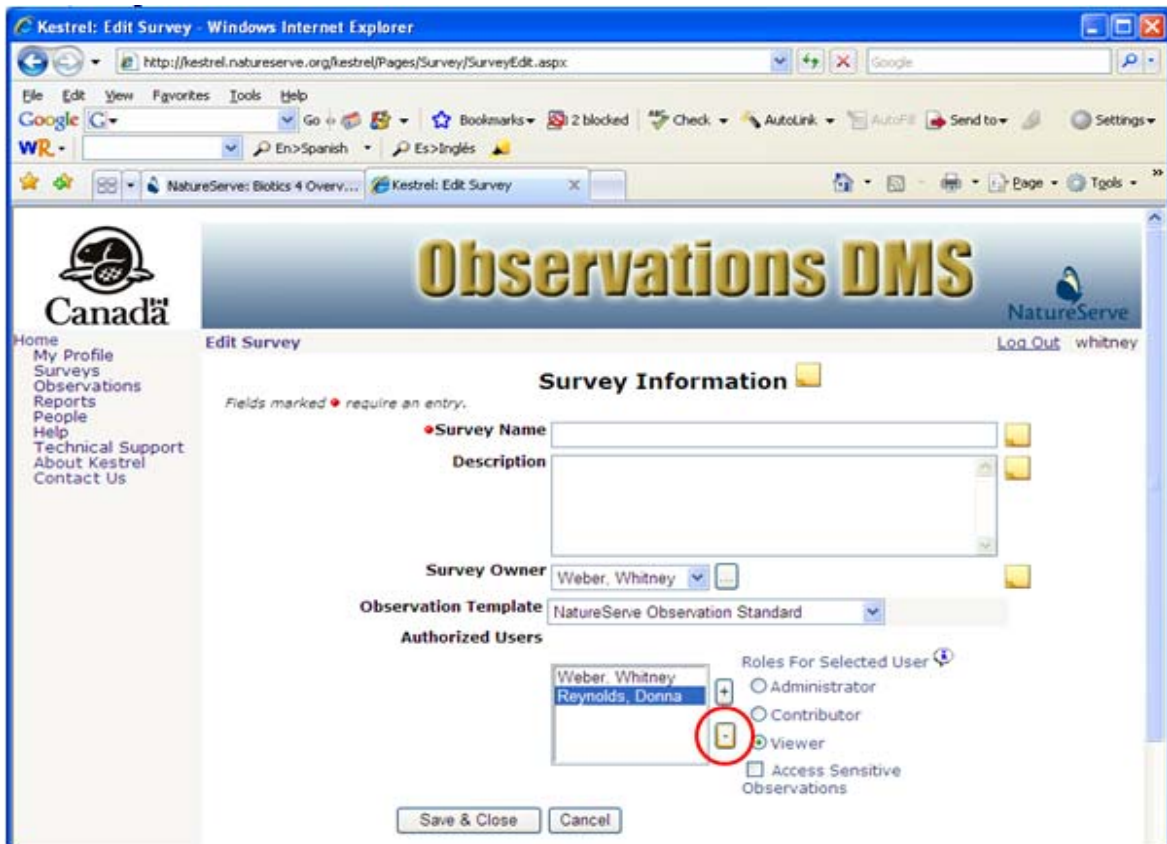
5. If the selected user should be granted access to sensitive observations within the survey, indicate such by checking the **Access Sensitive Observations** checkbox.

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.



Kestrel: Edit Survey - Windows Internet Explorer

http://kestrel.natureserve.org/kestrel/Pages/Survey/SurveyEdit.aspx

Observations DMS

Canada NatureServe

Edit Survey Log Out whitney

Fields marked ● require an entry.

● Survey Name

Description

Survey Owner Weber, Whitney

Observation Template NatureServe Observation Standard

Authorized Users

Weber, Whitney	<input type="button" value="[-]"/>	<input type="radio"/> Administrator
Reynolds, Donna	<input type="button" value="[-]"/>	<input type="radio"/> Contributor
		<input checked="" type="radio"/> Viewer

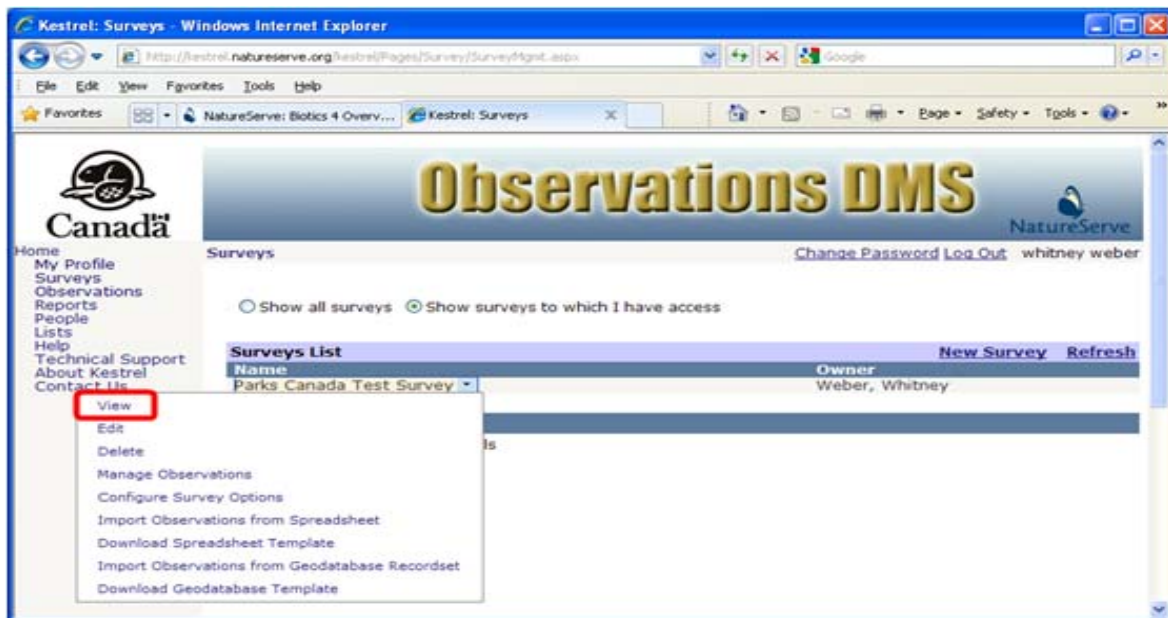
Access Sensitive Observations

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.

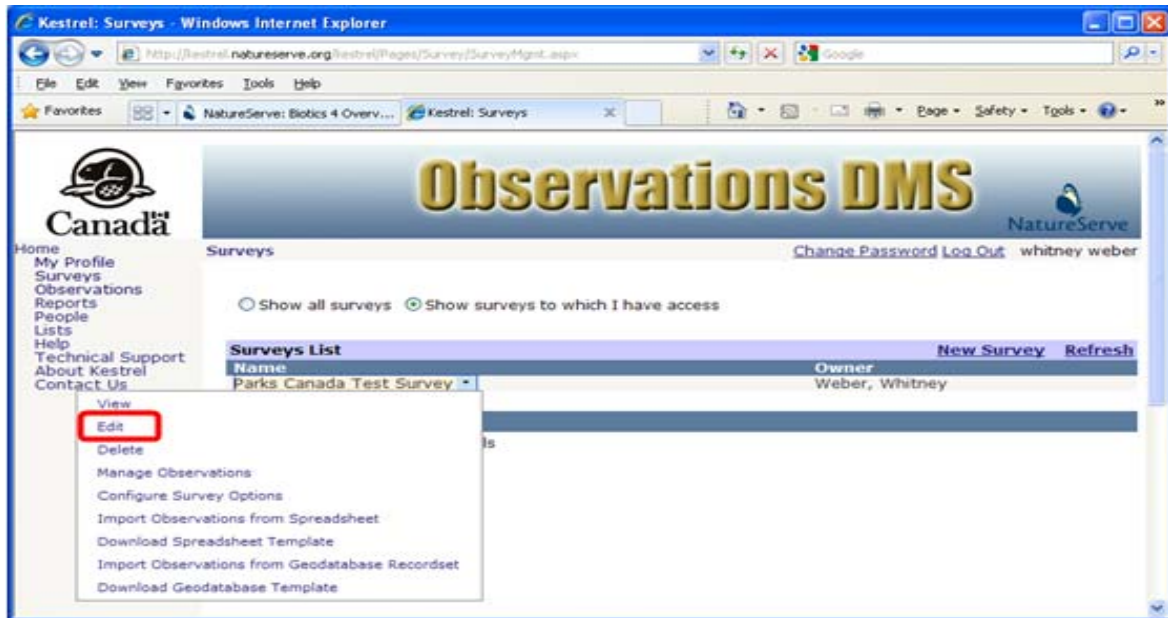


Related Tasks:

- [Edit Survey](#)
- [Delete Survey](#)
- [Manage Observations](#)
- [Configure Survey Options](#)
- [Download Spreadsheet Template](#)
- [Import Observations from Spreadsheet](#)
- [Download Geodatabase Template](#)
- [Import Observations from Geodatabase Recordset](#)

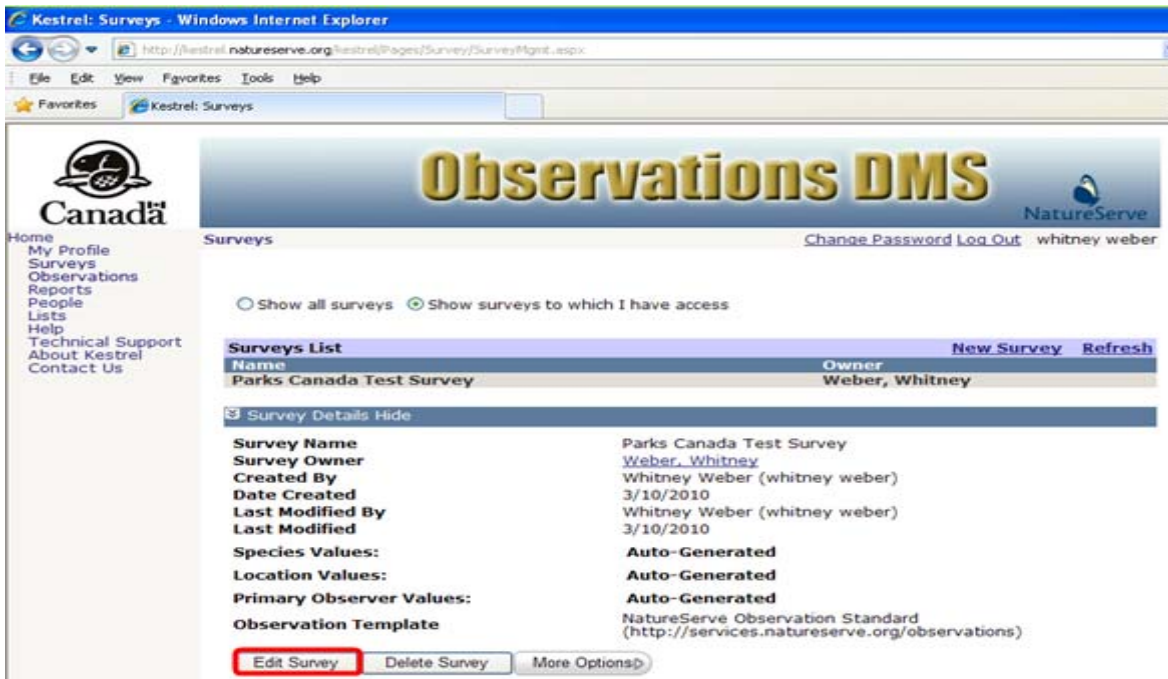
Edit Survey

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](#)

Kestrel: Edit Survey - Windows Internet Explorer

https://kestrel.natureserve.org/kestrel/Pages/Survey/SurveyEdit.aspx

Observations DMS

Canada NatureServe

Home Edit Survey Change Password Log Out jennifer nichols

My Profile
Surveys
Observations
Reports
People
Lists
Help
Technical Support
About Kestrel
Contact Us

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. Even Eberhardt is the owner and others are contributors to this survey (not to kestrel). Everyone will have sensitive

Survey Owner Eberhardt, Ewen

Observation Template NatureServe Observation Standard

Authorized Users

- Allen, Dawn
- Ashley, Paul
- Austin, Deborah
- Ayles, Paul
- Bartier, Patrick

Roles For Selected User

- Administrator
- Contributor
- Viewer

Access Sensitive Observations

Save & Close Cancel Delete

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

Kestrel: Edit Survey - Windows Internet Explorer
https://kestrel.natureserve.org/kestrel/Pages/Survey/SurveyEdit.aspx

Canada NatureServe

Home
My Profile
Surveys
Observations
Reports
People
Lists
Help
Technical Support
About Kestrel
Contact Us

Edit Survey [Change Password](#) [Log Out](#) jennifer nichols

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: NatureServe Observation Standard

Authorized Users

User	Role
Allen, Dawn	<input checked="" type="radio"/> Contributor
Ashley, Paul	<input type="radio"/> Administrator
Austin, Deborah	<input type="radio"/> Viewer
Ayles, Paul	<input type="radio"/> Administrator
Bartier, Patrick	<input type="radio"/> Viewer

Roles For Selected User:
 Administrator
 Contributor
 Viewer
 Access Sensitive Observations

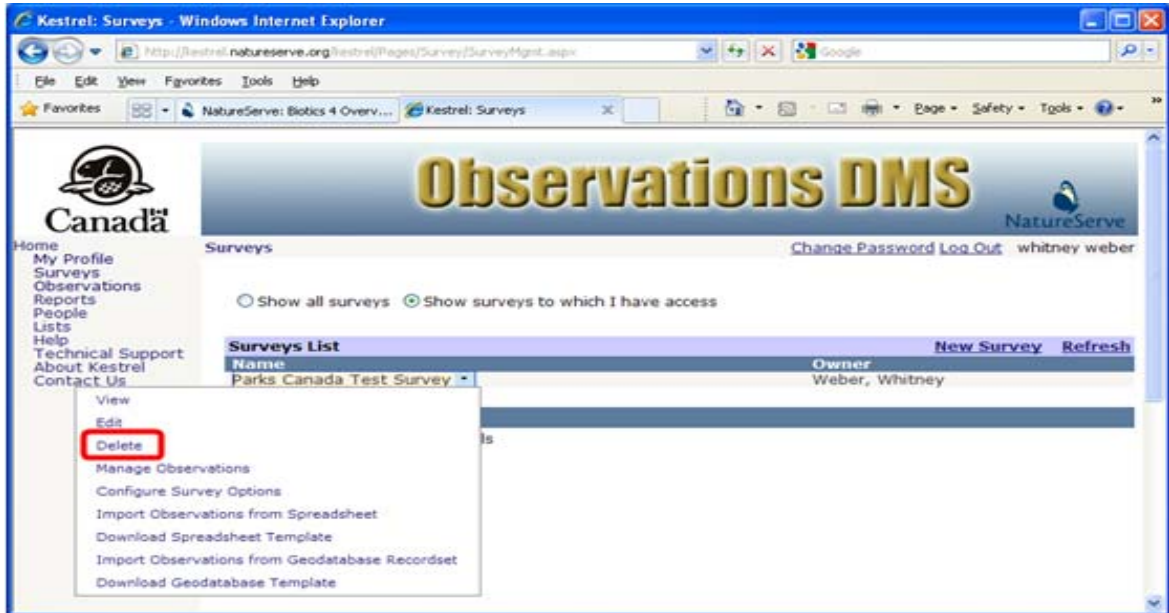
Save & Close Cancel Delete

Related Tasks:

- [Select Survey Owner](#)
- [Add Authorized User](#)
- [Delete Survey](#)

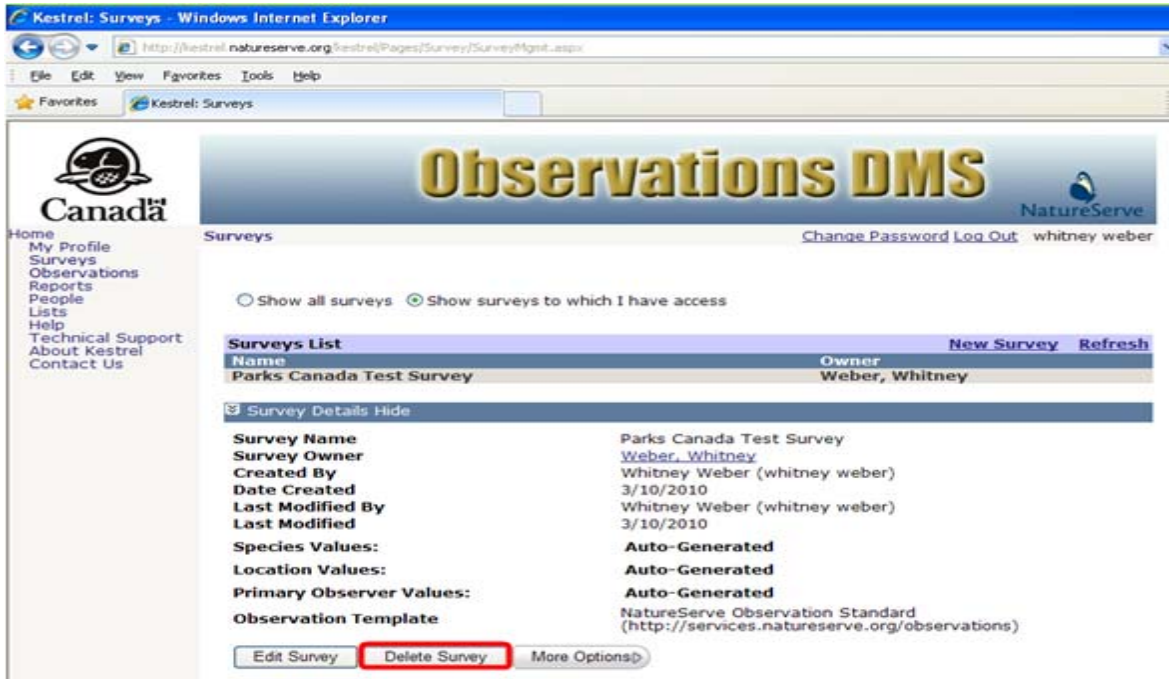
Delete Survey

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

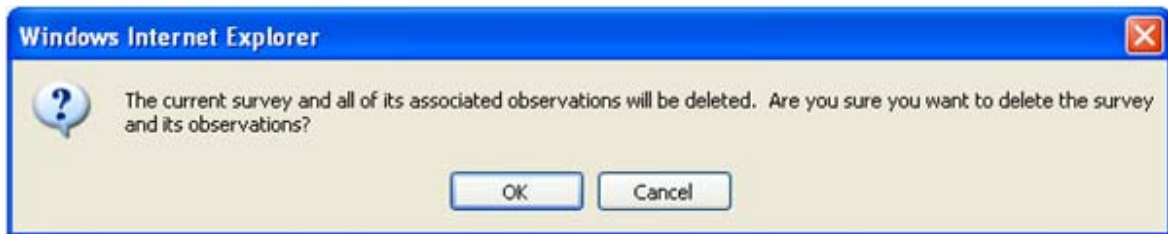


- OR -

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

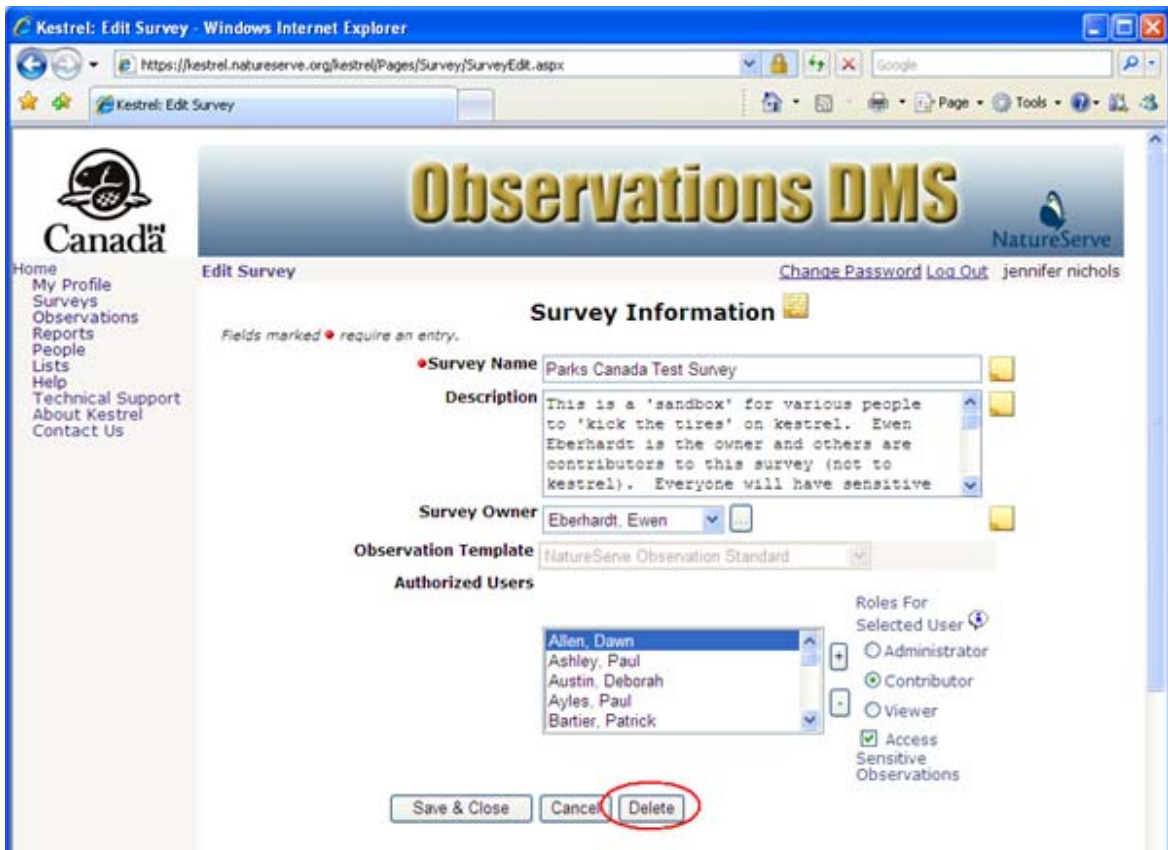


2. If a survey already contains observations, you will be warned that all observations contained within that survey will be deleted. You have the option to **CANCEL** the deletion at this point or you can proceed to delete the survey and all of its observations by selecting **OK**.

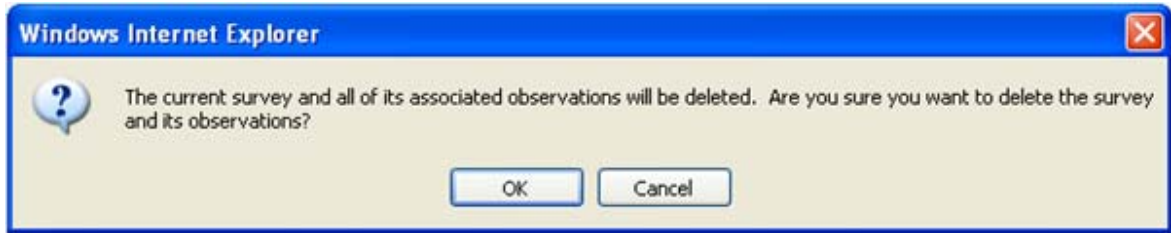


Edit Survey

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

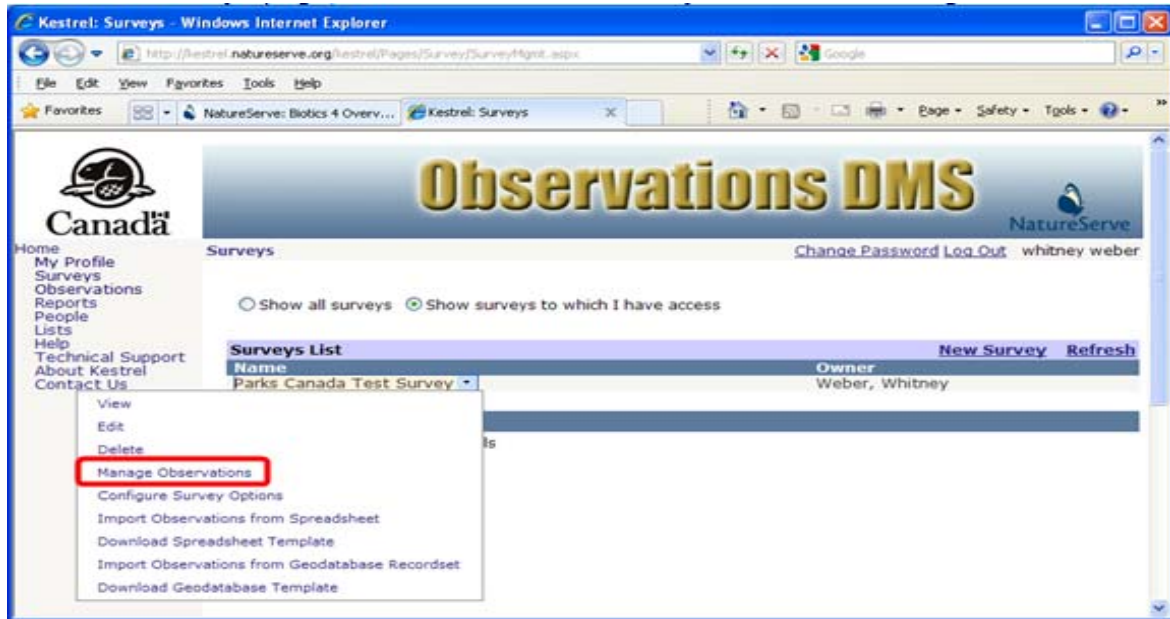


2. If a survey already contains observations, you will be warned that all observations contained within that survey will be deleted. You have the option to **CANCEL** the deletion at this point or you can proceed to delete the survey and all of its observations by selecting **OK**.



Manage Observations

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

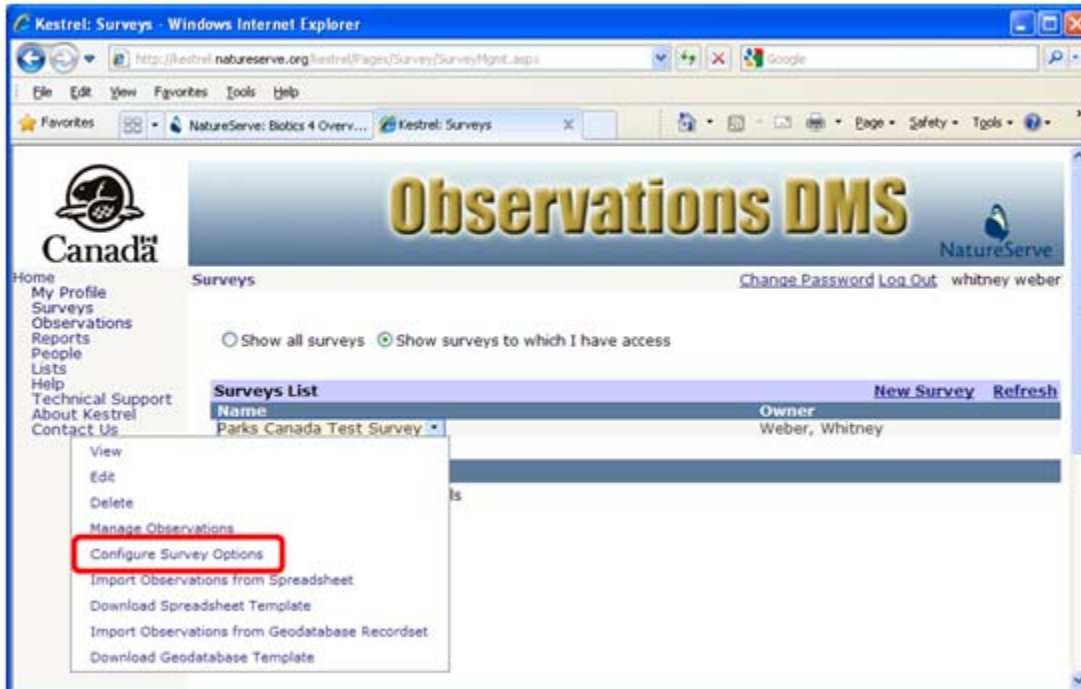


Related Tasks:

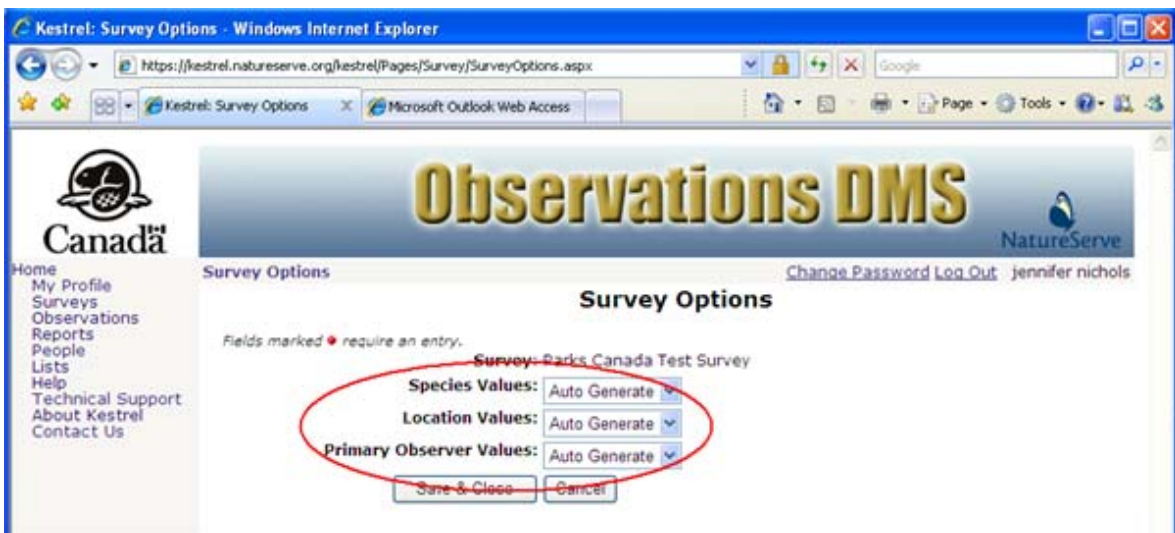
- [View Observation](#)
- [Edit Observation](#)
- [Delete Observation](#)
- [Create New Observation](#)

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 – Species Values, Location Values, and Primary Observer Values – to indicate how each field will be configured, as follows:



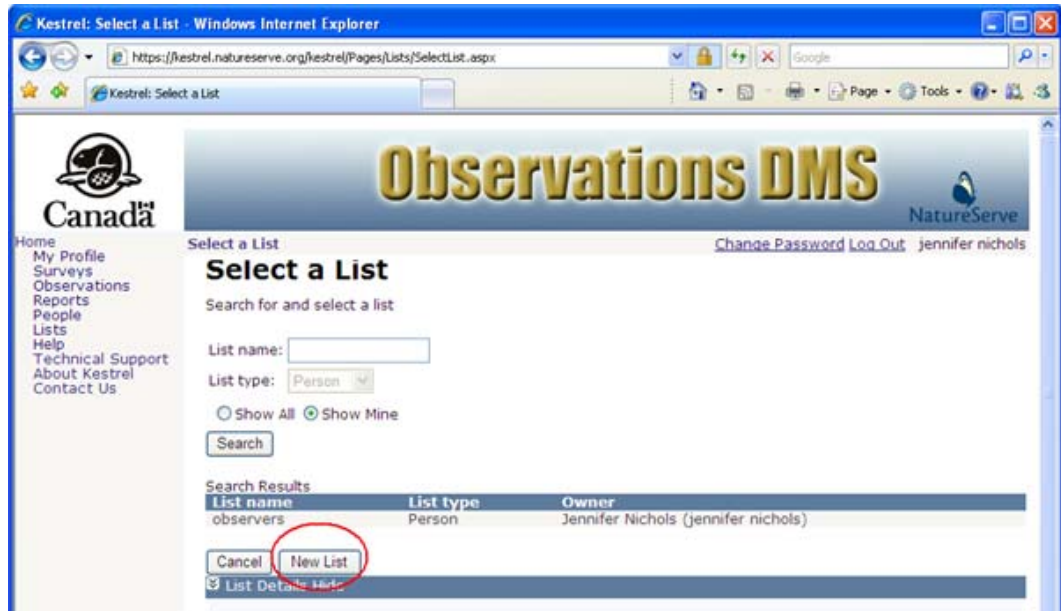
Auto Generate: By default (the default configuration) the system will automatically generate a set of values for that field consisting of the top 20 most-used values for that attribute (i.e., species, location, and primary observer) in this survey.

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.

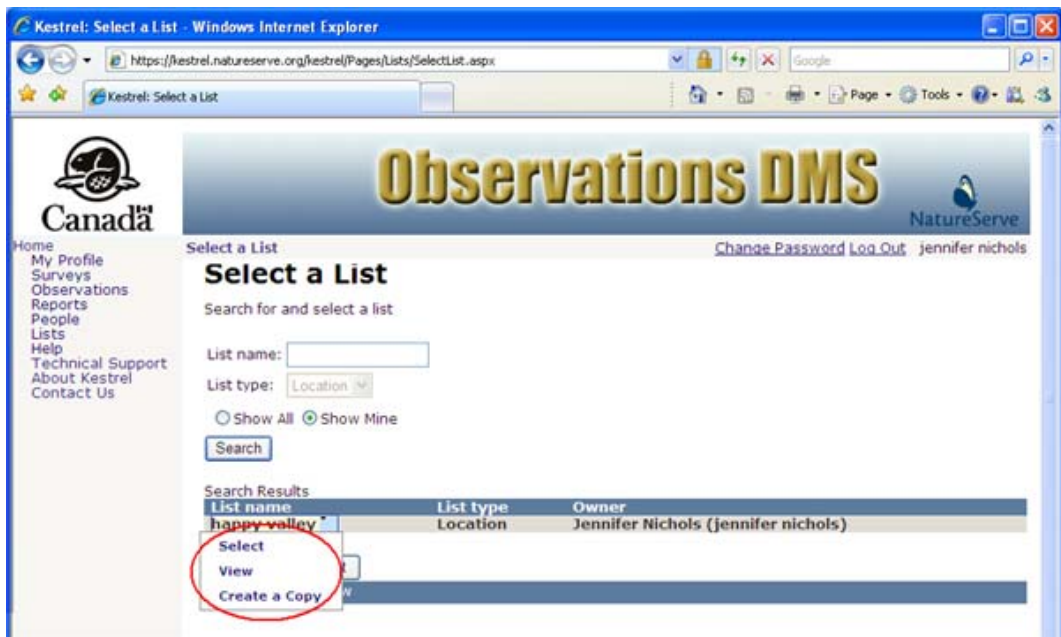
- a. Type in the name of a list of the appropriate type for the configuration field (which type is automatically indicated in the List Type field on the *Select a List* page), and click **Search**. To display the entire set of all lists of the specified type, merely click **Search**, using the radio 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**).



The screenshot shows a web browser window titled "Kestrel: Select a List - Windows Internet Explorer". The address bar shows the URL "https://kestrel.natureserve.org/kestrel/Pages/Lists/SelectList.aspx". The page header includes the "Canada" logo and "Observations DMS" in large yellow letters, with "NatureServe" on the right. A navigation menu on the left lists: Home, My Profile, Surveys, Observations, Reports, People, Lists, Help, Technical Support, About Kestrel, and Contact Us. The main content area is titled "Select a List" and contains the text "Search for and select a list". Below this is a form with a "List name:" text box, a "List type:" dropdown menu set to "Species", and two radio buttons: "Show All" (selected) and "Show Mine". A "Search" button is circled in red. At the bottom of the form are "Cancel" and "New List" buttons, and a "List Details Hide" link.

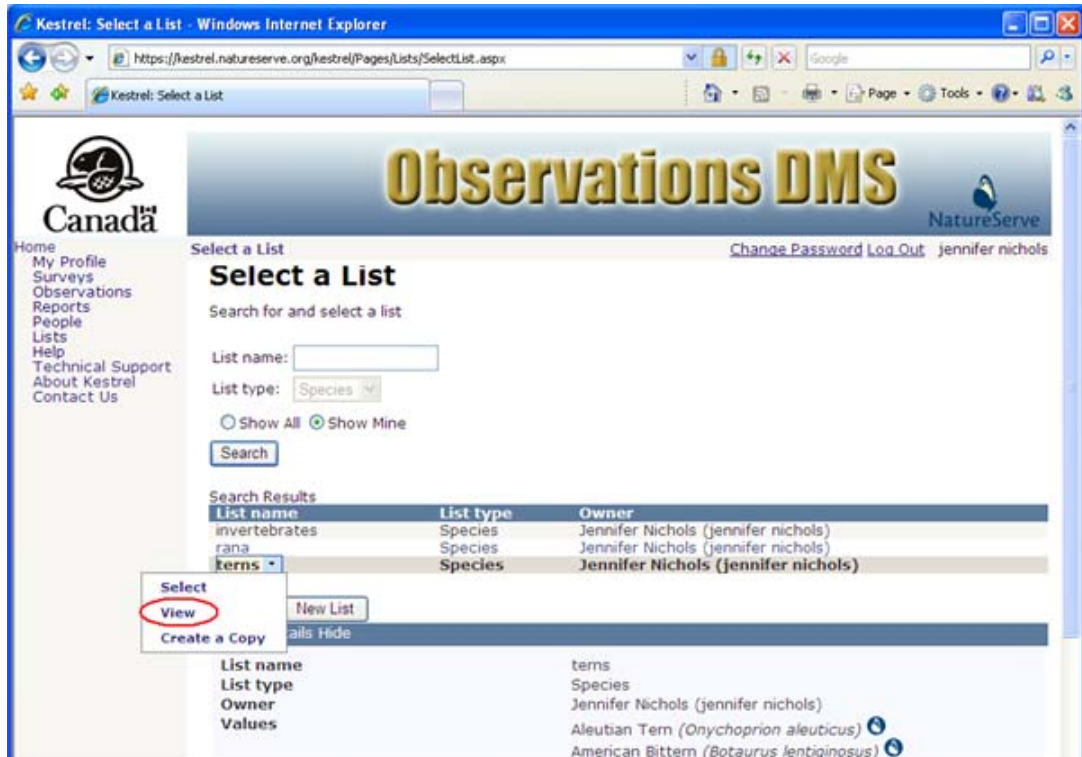
- b. If the desired list for configuring a values field has not yet been created, click the **New List** button to open the *Edit List* page to create a new list (see the Create New List topic for instructions on completing the fields on this page).



- 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.




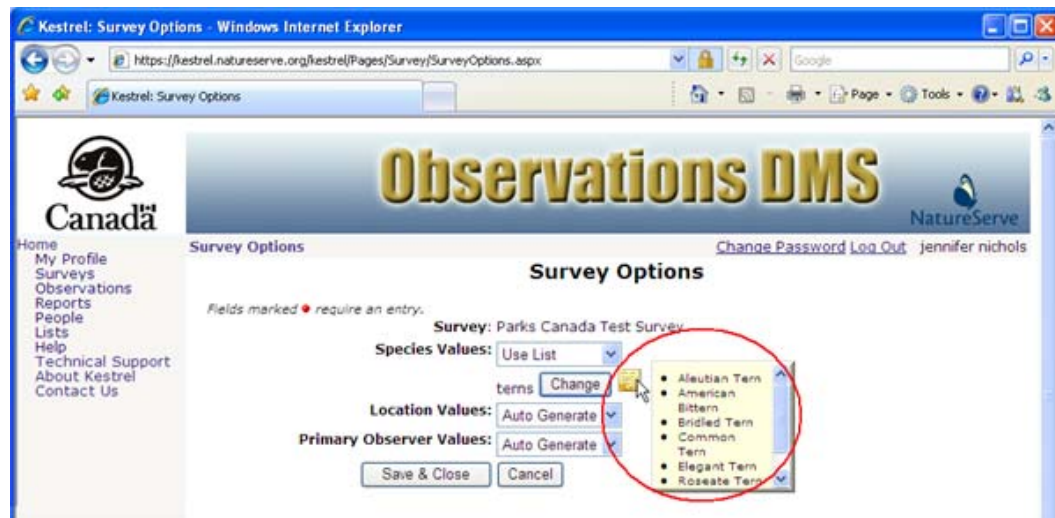
- To copy the selected list, choose **Create a Copy** from the dropdown menu. Within the *Edit List* page, enter a new name for the copied list, add/remove values from the copied set as desired, and click **Save & Close**.



- 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.

- 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](#)

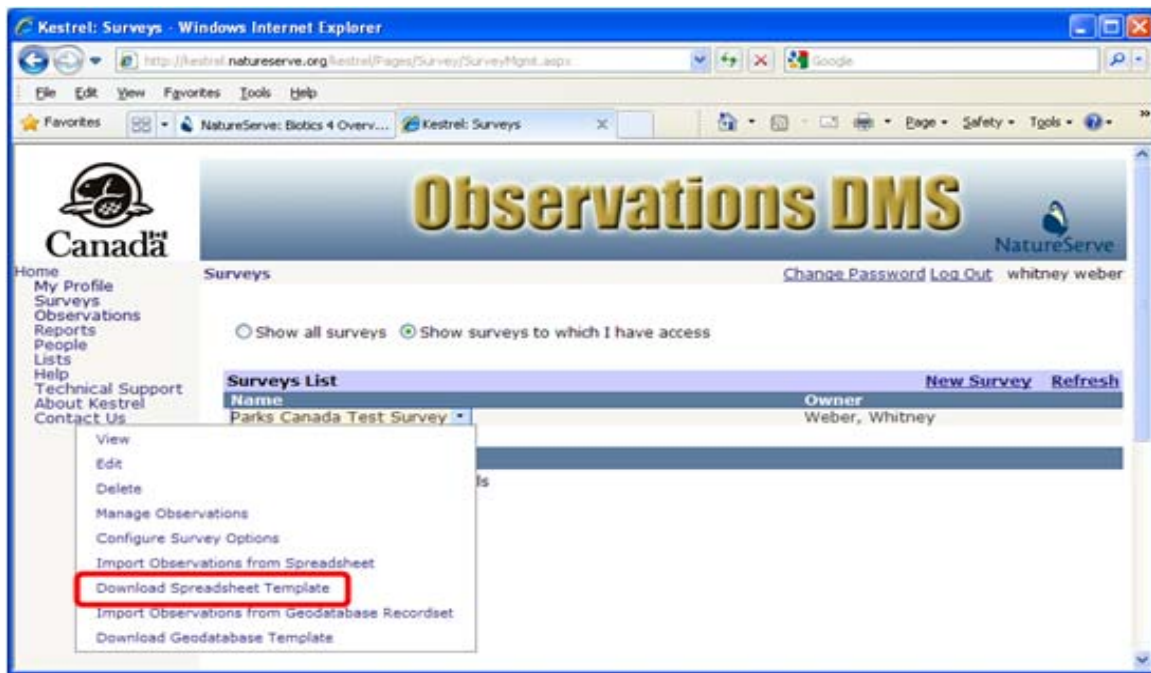
Download Spreadsheet Template

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

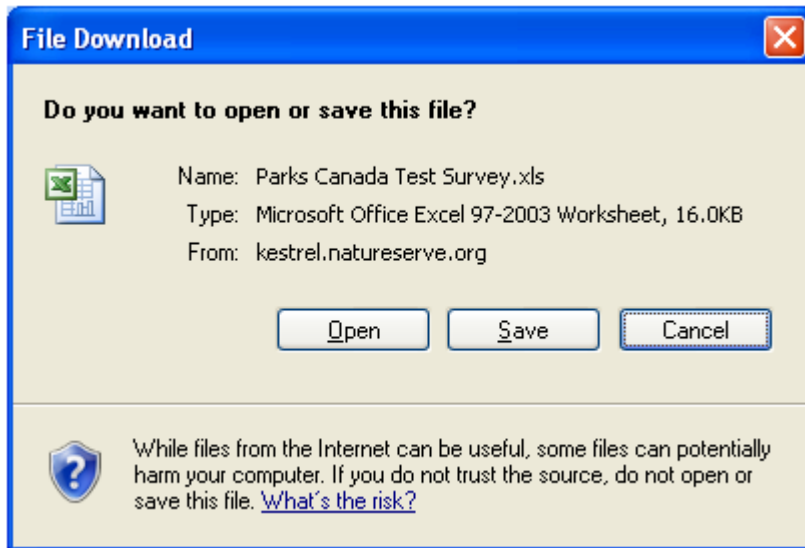
The generated spreadsheet will contain a column for each attribute in the selected survey. If an attribute supports comments, an extra column will be included for the attribute that can be used for this purpose.

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](#).

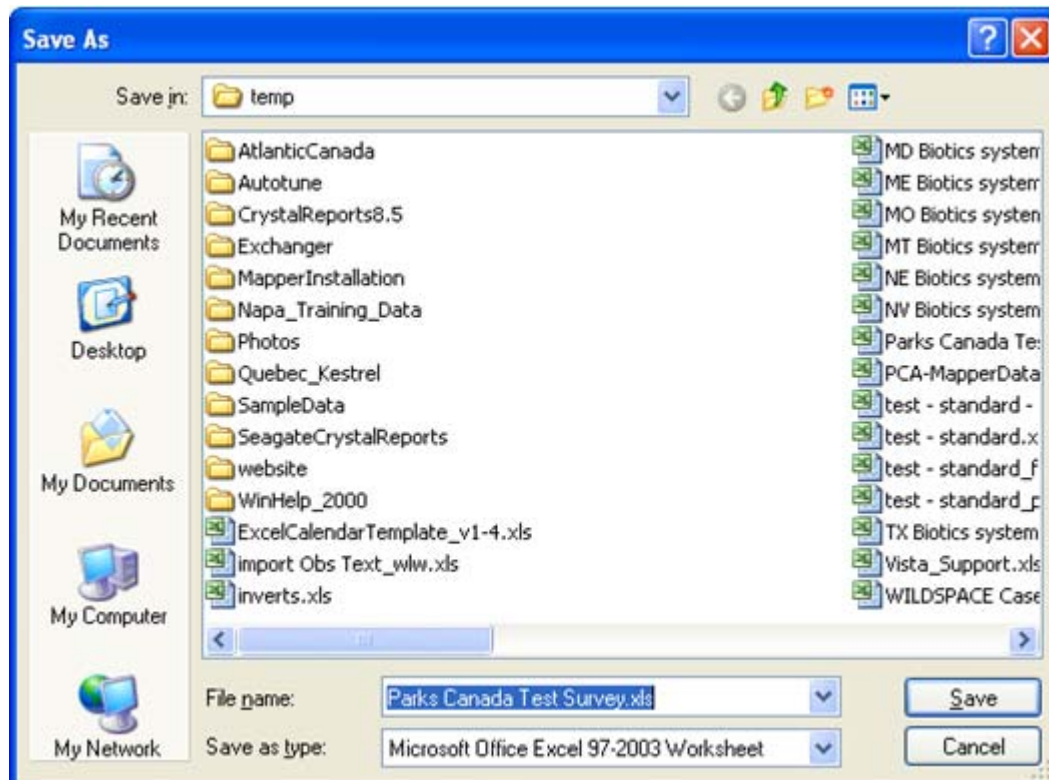
1. Within the *Surveys* page, click on the desired survey into which to import the observations and choose **Download Spreadsheet Template**.



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 location'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 be 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.

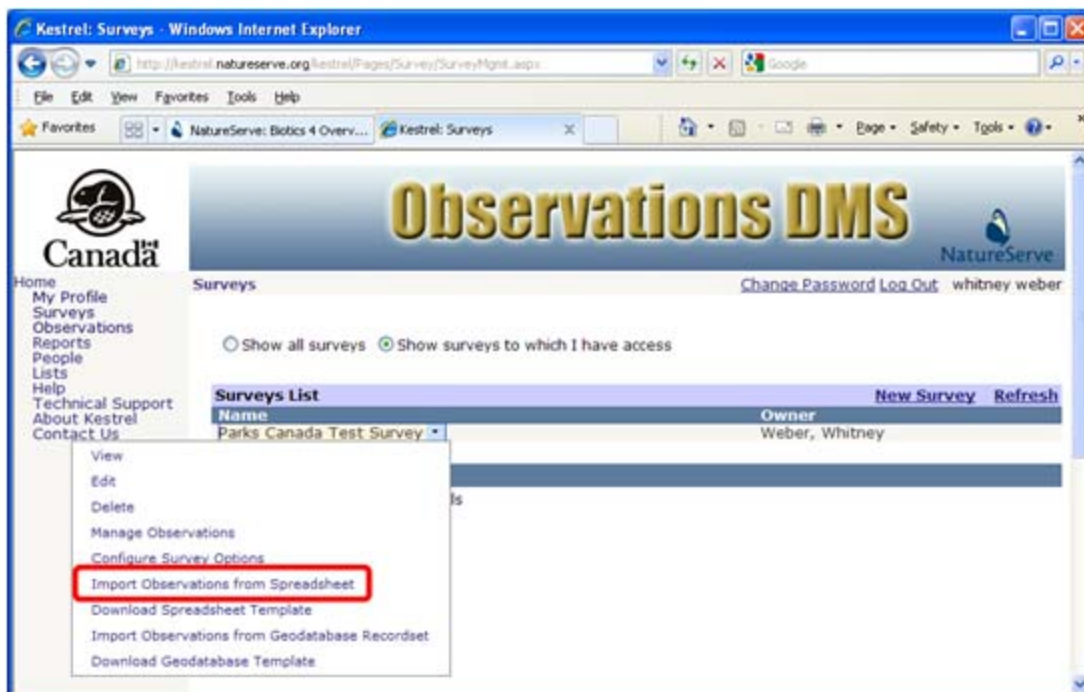
Be aware that a test will not catch all data mistakes. It will detect data format errors, search values that cannot be resolved and required attributes that are missing a value. However, certain mistakes cannot be detected until an attempt is actually made to insert an observation. This includes range 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.

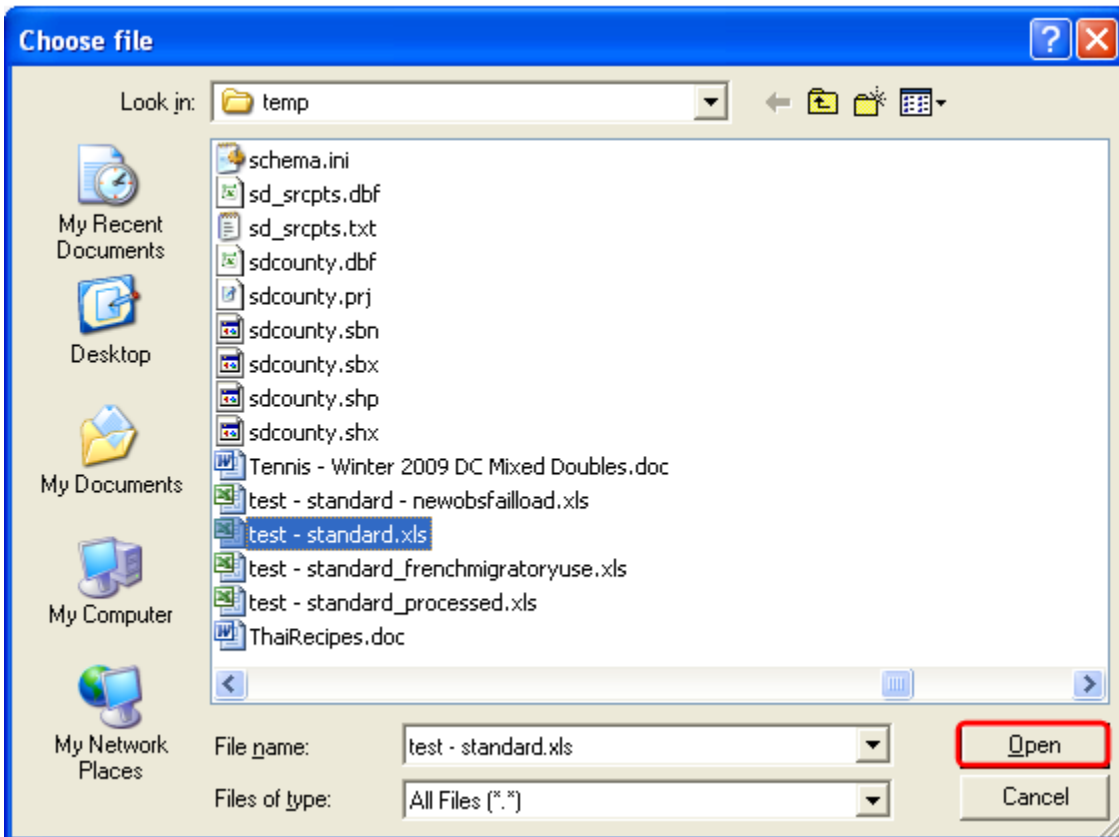
1. Within the *Surveys* page, click on the desired survey into which to import the observations and choose **Import Observations from Spreadsheet**.



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



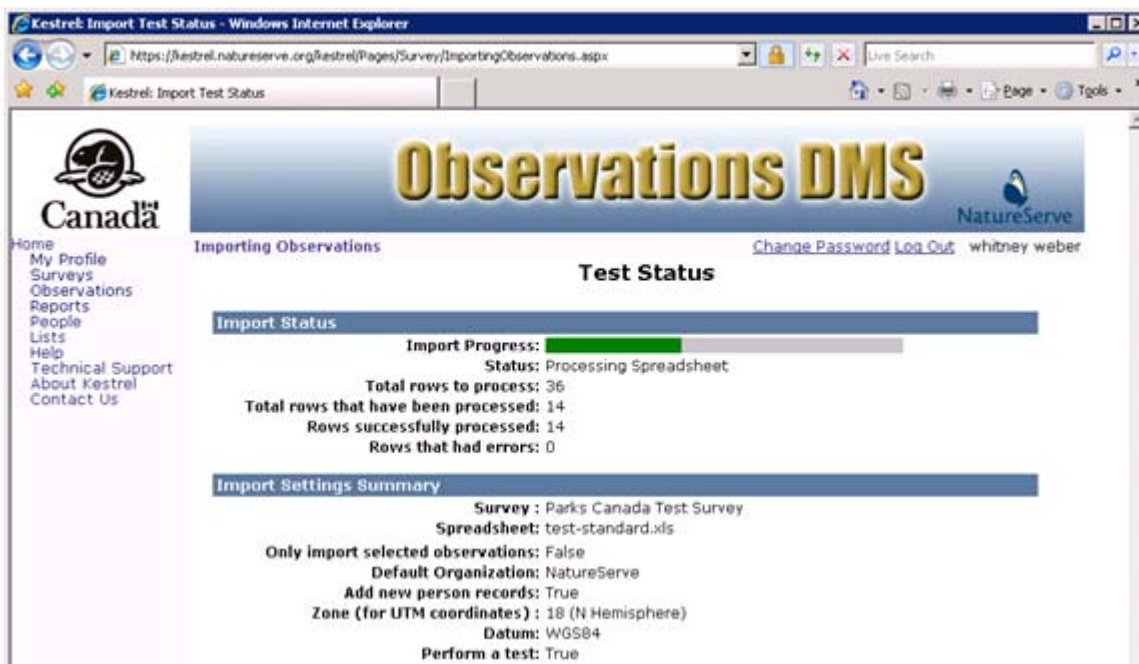
3. In the *Choose File* window, navigate to the spreadsheet from which to import the observations, select it and click **Open**.



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.

The screenshot shows the 'Import Observations' form in a web browser. The browser title is 'Kestrel: Import Observations - Windows Internet Explorer'. The address bar shows the URL: <https://kestrel.natureserve.org/kestrel/Pages/Survey/ImportObservationsForm.aspx>. The page features the Canada logo on the left and the 'Observations DMS' header. The user is logged in as 'whitney weber'. The form is titled 'Import Observations' and is for the 'Survey : Parks Canada Test Survey'. It includes a file upload field with a 'Browse' button, a checkbox for 'Only import selected observations', a 'Default Organization' dropdown set to 'NatureServe', a checked 'Add new person records' checkbox, a 'Zone (for UTM coordinates)' dropdown set to '18 (N Hemisphere)', a 'Datum' dropdown set to 'WGS84', and a checked 'Perform a test' checkbox. At the bottom, there are two buttons: 'Import Observations' (highlighted with a red box) and 'Cancel'.

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.

The screenshot shows a web browser window titled "Kestrel:Import Test Complete - Windows Internet Explorer". The address bar displays the URL: <https://kestrel.natureserve.org/kestrel/Pages/Survey/ImportObservationsFinished.aspx>. The page features the "Canada" logo on the left and the "Observations DMS" header in large yellow text. Below the header, the text "Observations Imported" and "Test Complete" are visible. A navigation menu on the left includes links for Home, My Profile, Surveys, Observations, Reports, People, Lists, Help, Technical Support, About Kestrel, and Contact Us. The main content area displays the following information:

Import Status

- Total rows processed: 36
- Rows successfully processed: 36
- Rows that had errors: 0

Import Settings Summary

- Survey : Parks Canada Test Survey
- Spreadsheet: test-standard.xls
- Only import selected observations: False
- Default Organization: NatureServe
- Add new person records: True
- Zone (for UTM coordinates) : 18 (N Hemisphere)
- Datum: WGS84
- Perform a test: True

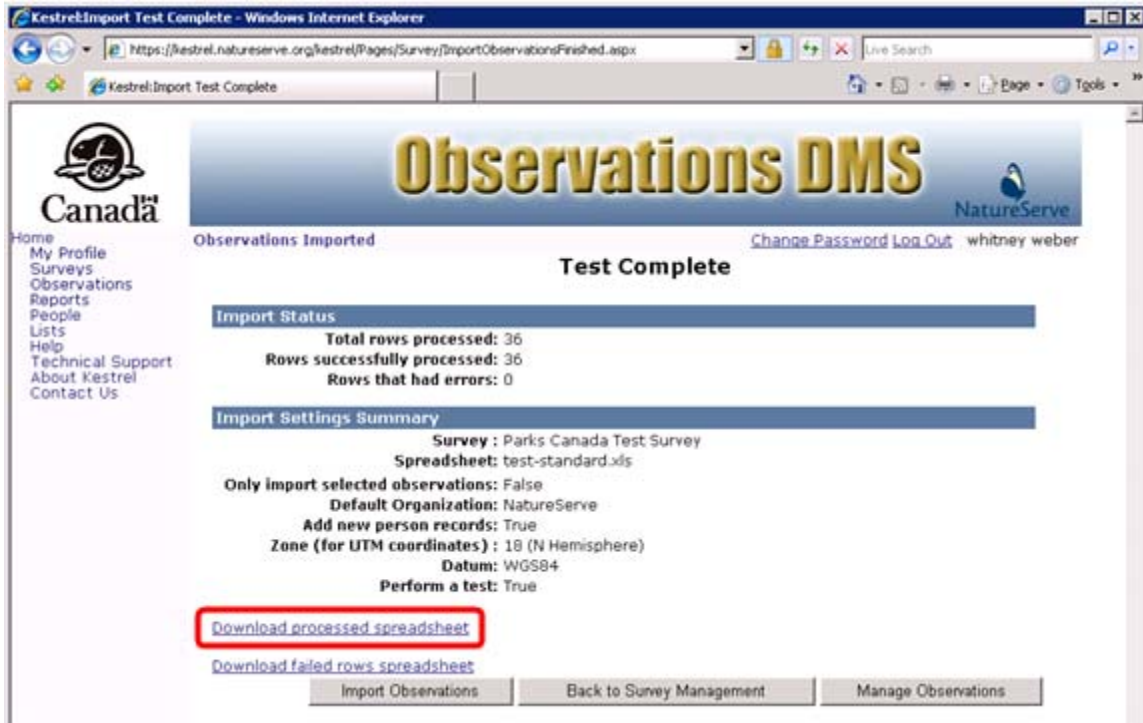
Below the summary, there are two links: [Download processed spreadsheet](#) and [Download failed rows spreadsheet](#). At the bottom of the page, there are three buttons: "Import Observations", "Back to Survey Management", and "Manage Observations".

Related Tasks:

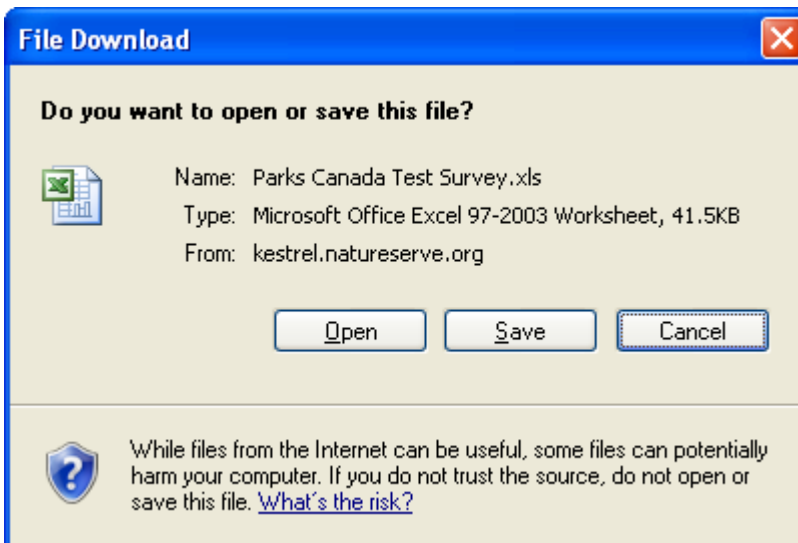
- [Manage Observations](#)
- [Download Processed Spreadsheet](#)

Download Processed Spreadsheet

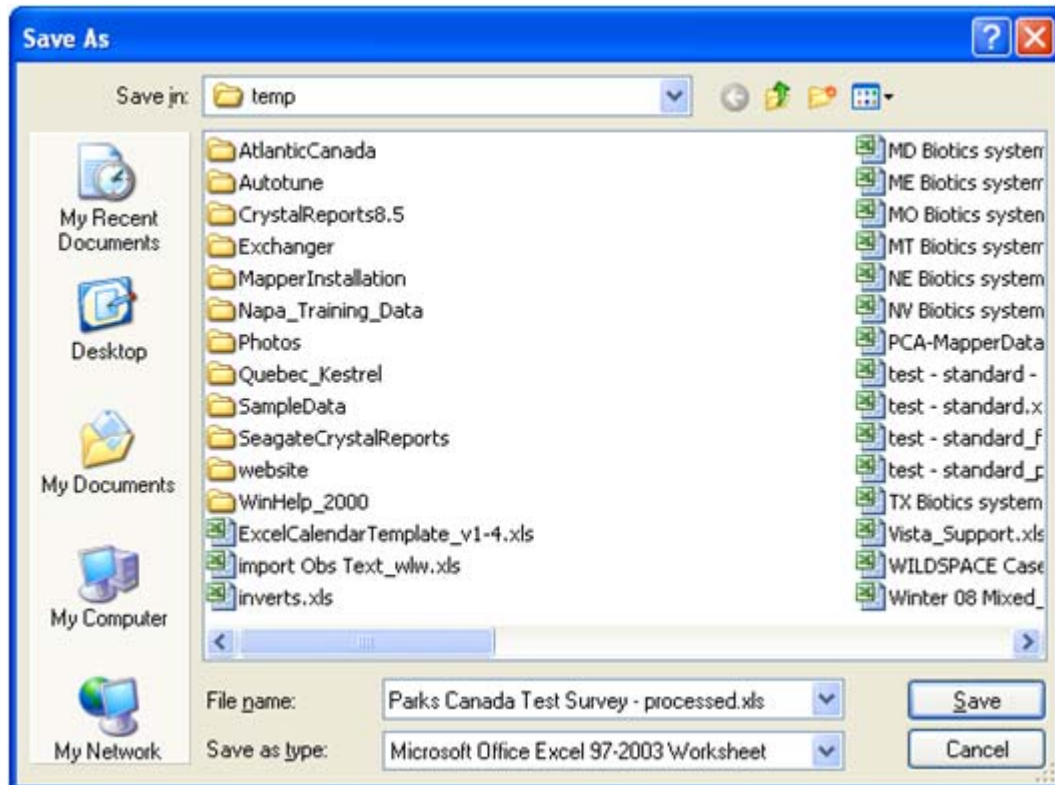
1. Within the *Import Complete* page, select to **Download processed spreadsheet** to review both imported and failed rows.



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.

1	Kestrel ID	Import Observation?	Species	Species Comments
2	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_1		Liparis green [[ELEMENT_NATIONAL 2 738277]]	
3	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_2		Lynx canadensis [[ELEMENT_NATIONAL 2 167945]]	testing comments
4			Pholidae	testing higher taxonomic search
5	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_3		Autolychnus flavidus [[ELEMENT_NATIONAL 2 730072]]	testing comments
6	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_4		Sebastes caivus [[ELEMENT_NATIONAL 2 738194]]	testing comments
7	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_5		Gobiesox maeandricus [[ELEMENT_NATIONAL 2 738157]]	
8	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_6		Gobiesox maeandricus [[ELEMENT_NATIONAL 2 738157]]	testing comments
9	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_7		Hexagrammos decagrammus [[ELEMENT_NATIONAL 2 738102]]	testing comments
10	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_8		Rana aurora [[ELEMENT_NATIONAL 2 167592]]	testing comments
11	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_9		Lynx canadensis [[ELEMENT_NATIONAL 2 167945]]	testing comments
12	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_10		Sebastes paucispinis [[ELEMENT_NATIONAL 2 637264]]	
13	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_11		Sebastes caivus [[ELEMENT_NATIONAL 2 738194]]	
14			Hexagrammos decagrammus	
15	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_12		Pholis taeta [[ELEMENT_NATIONAL 2 738282]]	
16	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_13		Anas americana [[ELEMENT_NATIONAL 2 163245]]	
17	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_14		Aythya colaris [[ELEMENT_NATIONAL 2 165598]]	
18	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_15		Aegolus acadicus [[ELEMENT_NATIONAL 2 163683]]	
19	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_16		Sebastes melanops [[ELEMENT_NATIONAL 2 738176]]	
20	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_17		Turdus migratorius [[ELEMENT_NATIONAL 2 162512]]	
21	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_18		Sialia sialis [[ELEMENT_NATIONAL 2 167134]]	
22			Eastern bluebird	testing common name search
23	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_19		Turdus migratorius [[ELEMENT_NATIONAL 2 162512]]	Original value: American robin testing common name search
24	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_20		Alicia americana [[ELEMENT_NATIONAL 2 792117]]	Original value: Moose testing single word search - higher tax
25	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_21		Alicia americana [[ELEMENT_NATIONAL 2 792117]]	
26	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_22		Aythya [[HIGHER_CLASS_UNIT 2 101141]]	Original value: Aythya sp. testing higher taxonomic search
27	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_23		Liparis green [[ELEMENT_NATIONAL 2 738277]]	
28	http://services.natureserve.org/observations/Storage/survey/7d4NEW_OBS_24		Liparis green [[ELEMENT_NATIONAL 2 738277]]	
29			Liparis green	
30			Liparis green	testing no species
31			Liparis green	
32			Lynx canadensis	
33			Pholis taeta	

Related Tasks:

- [Import Observations from Spreadsheet](#)

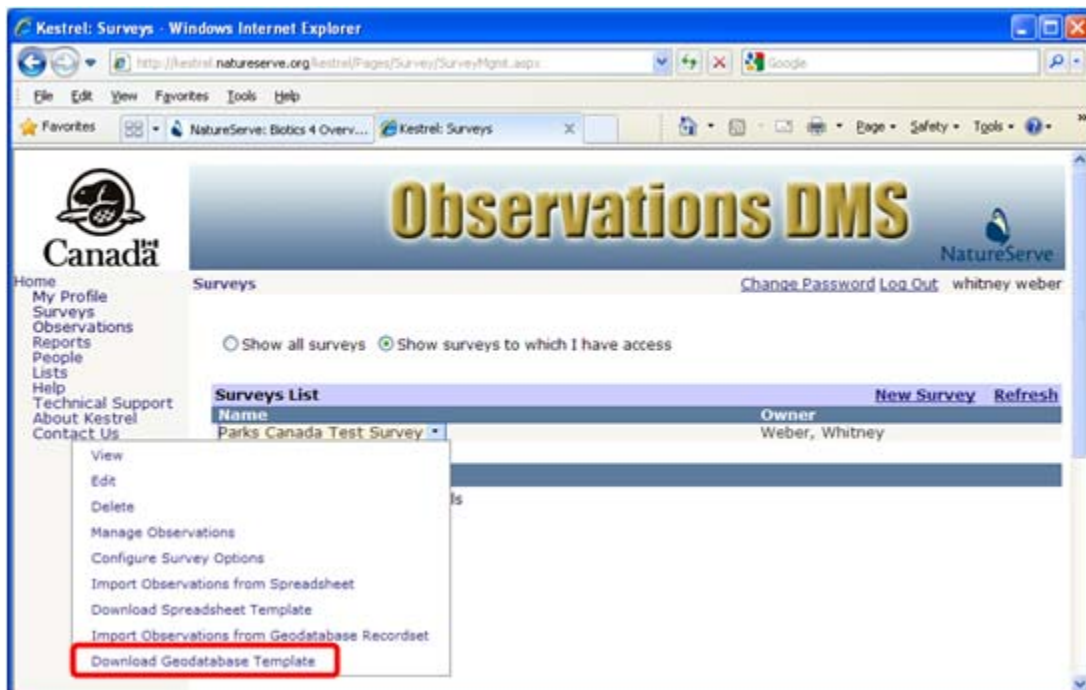
Download Geodatabase Template

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](#).

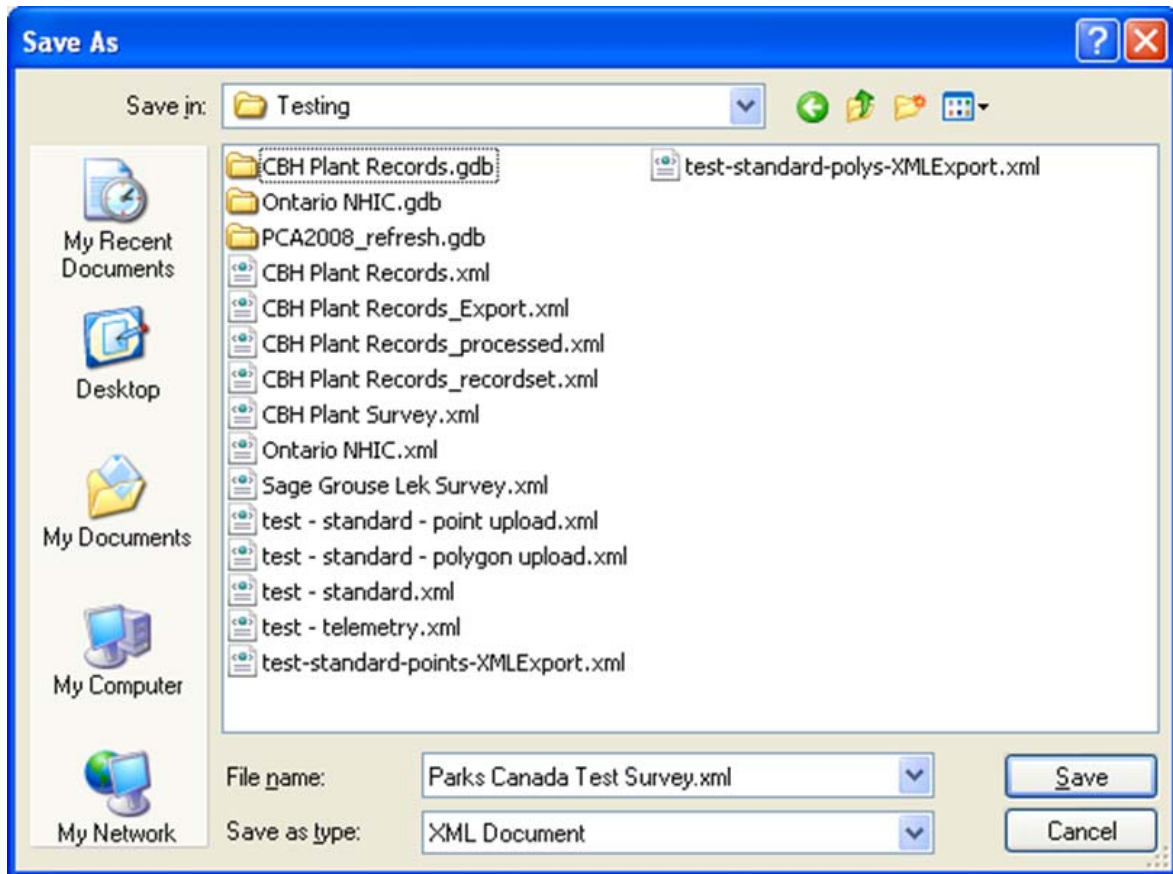
1. Within the *Surveys* page, click on the desired survey into which to import the observations and choose **Download Geodatabase Template**.



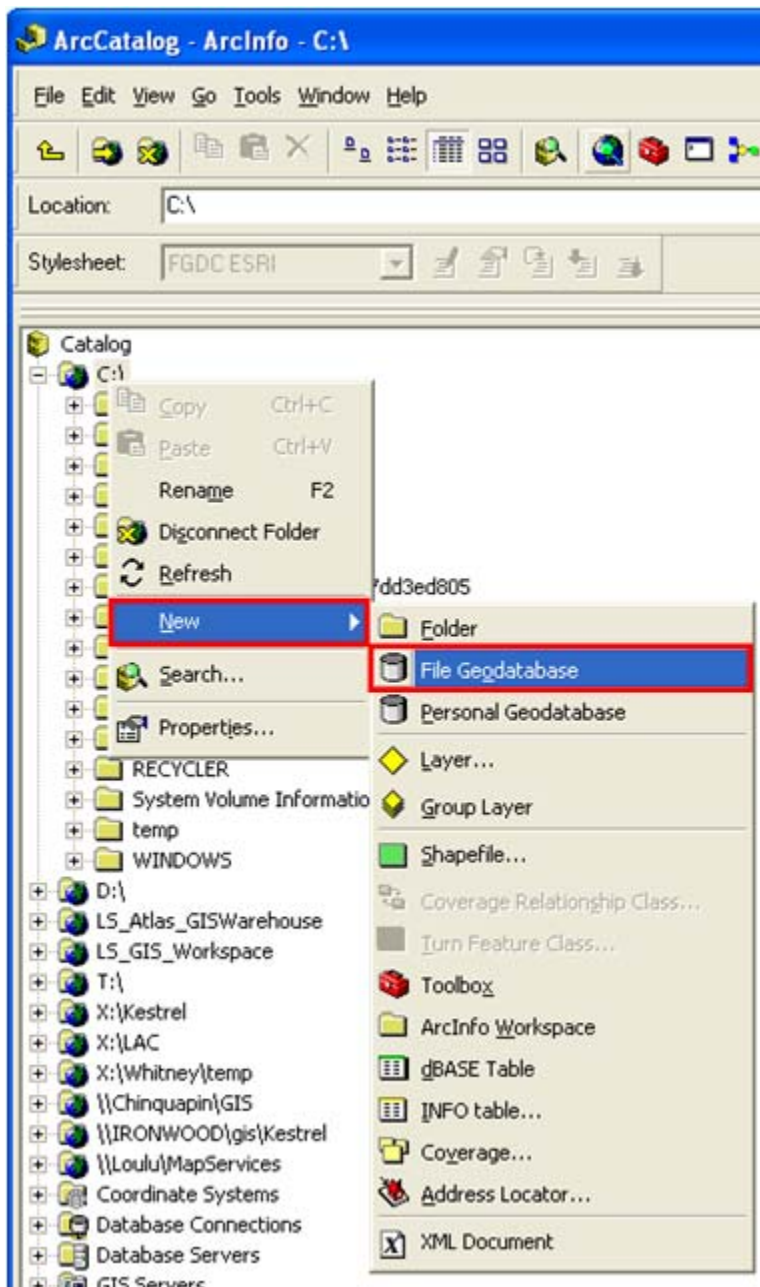
2. In the *File Download* window, choose to **Save** the data entry form.



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

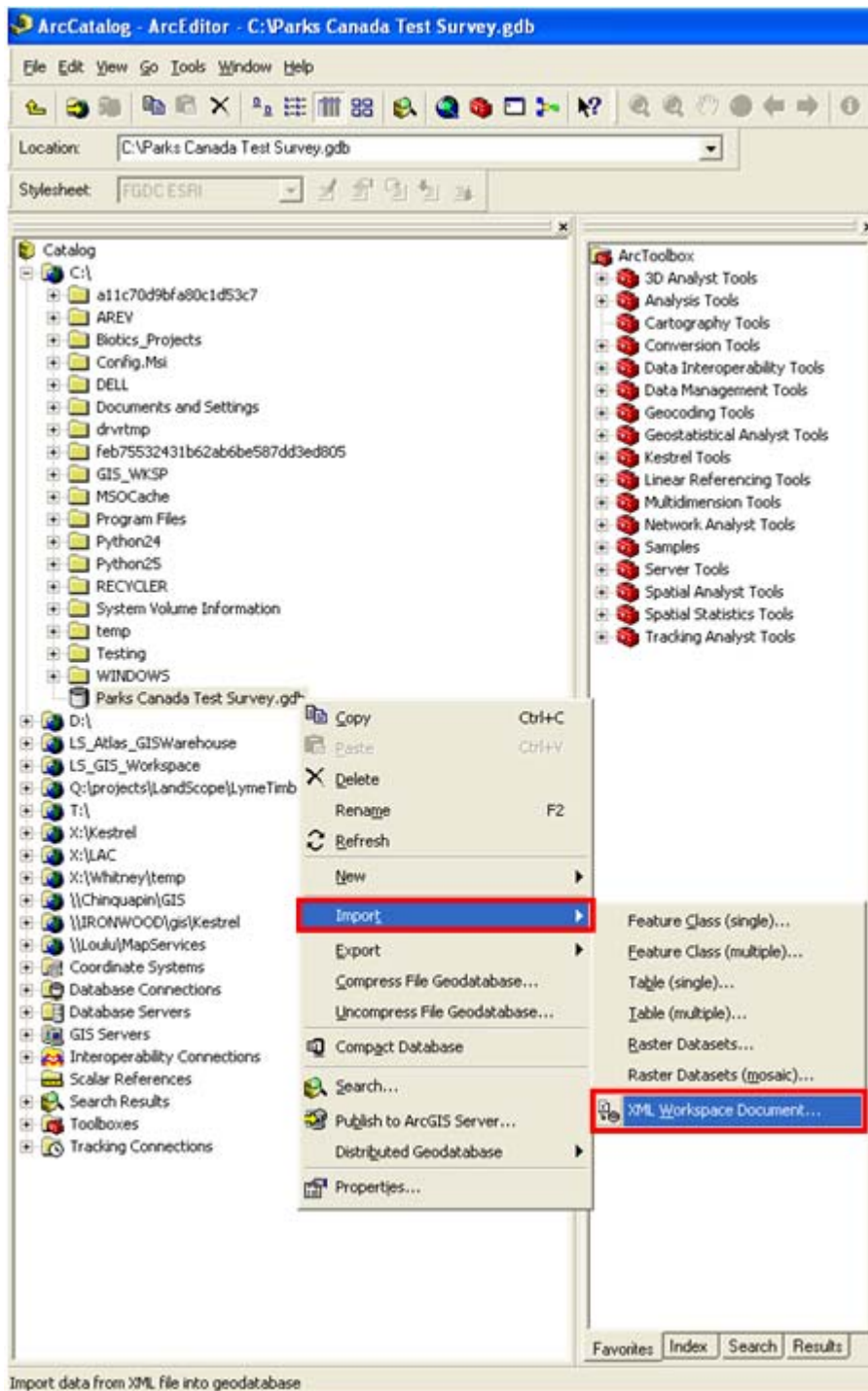


4. In ArcCatalog, right click on the directory where you would like to create the geodatabase and choose **New, File Geodatabase** (either File or Personal Geodatabase).

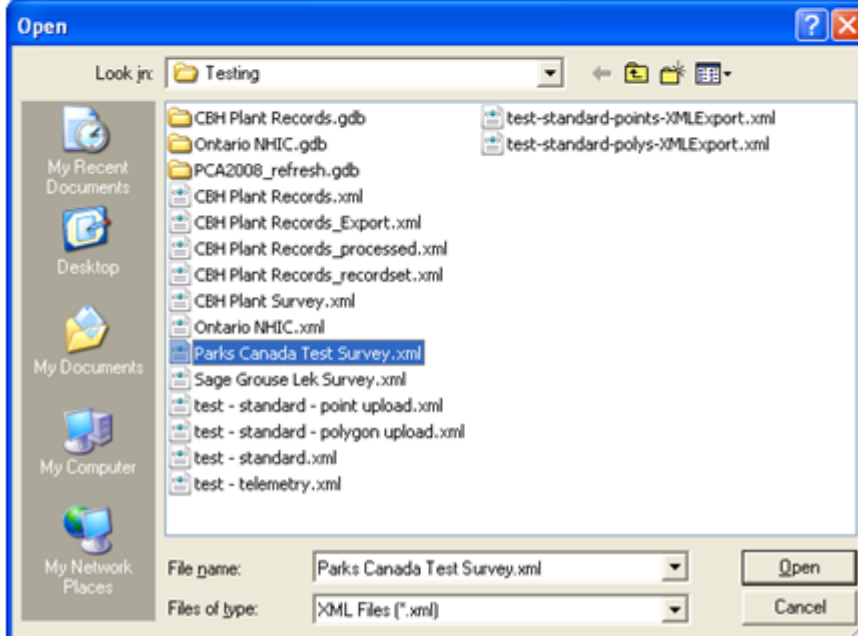
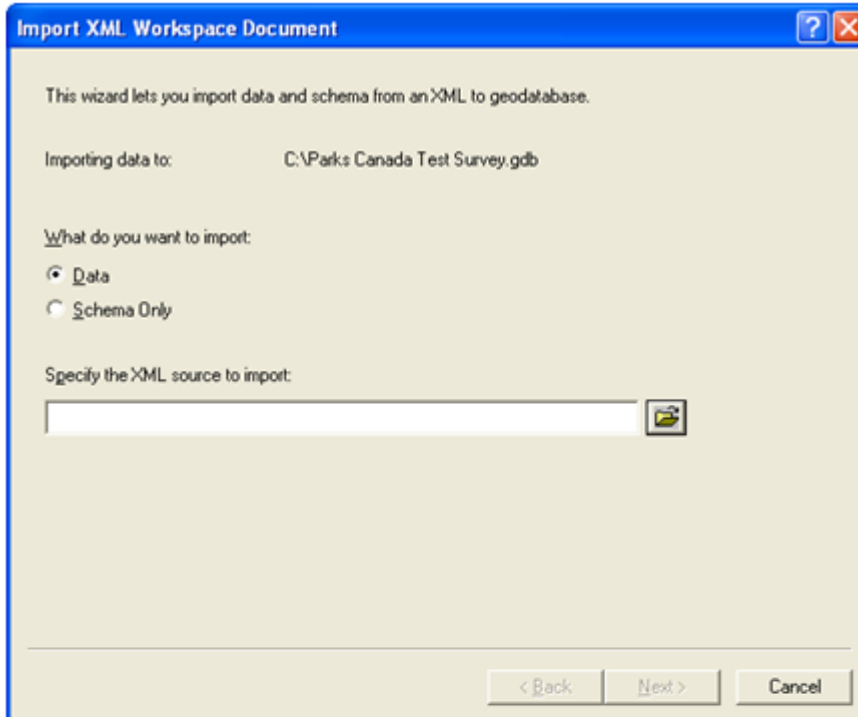


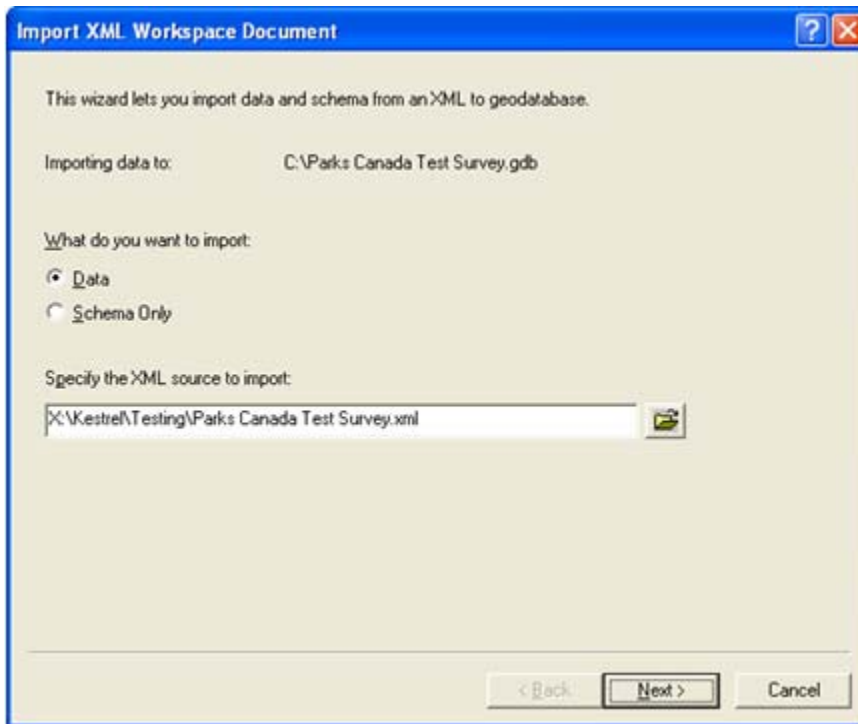
5. Rename the file as desired.
6. Right click on the newly created File/Personal Geodatabase and choose **Import, XML Workspace Document**.

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

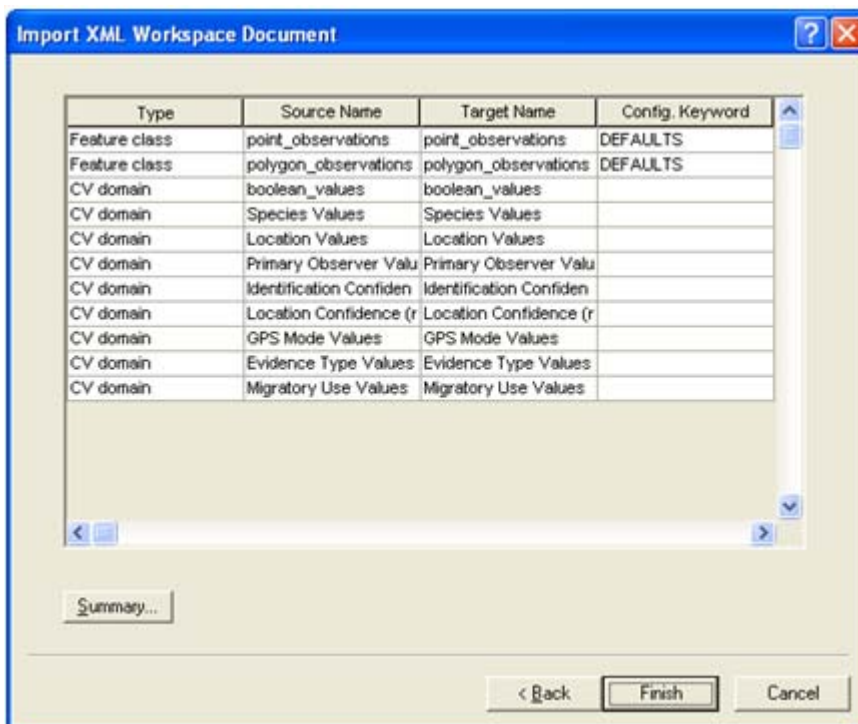


7. In the *Import XML Workspace Document* window, select **Data** and browse to where you saved the xml in Step 2 and click **Next**.

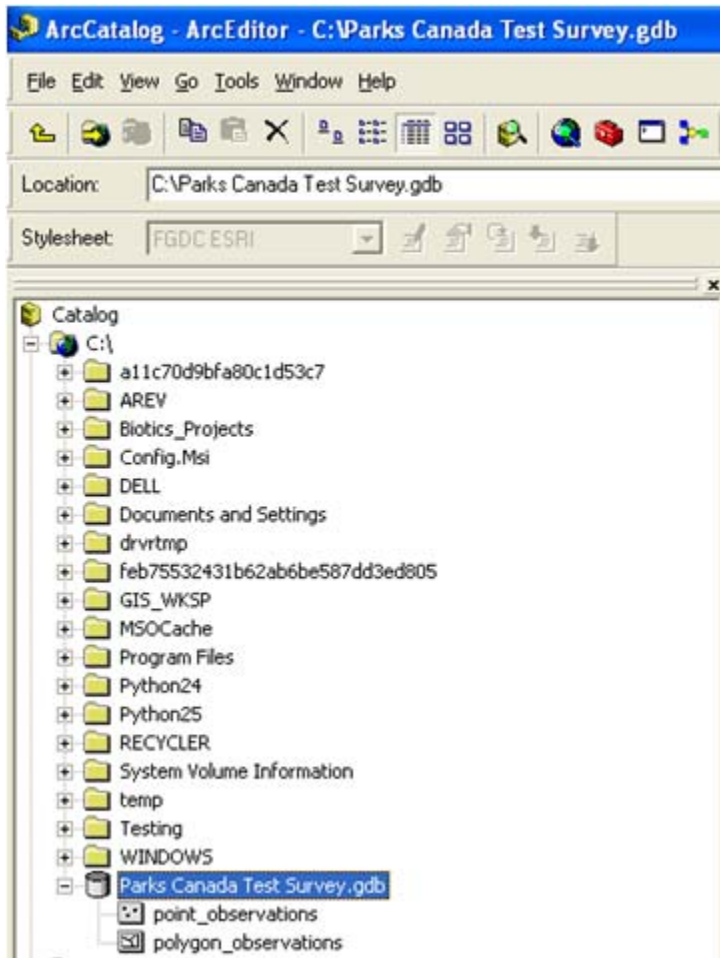




8. In the next window, choose **Finish**.



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 "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.

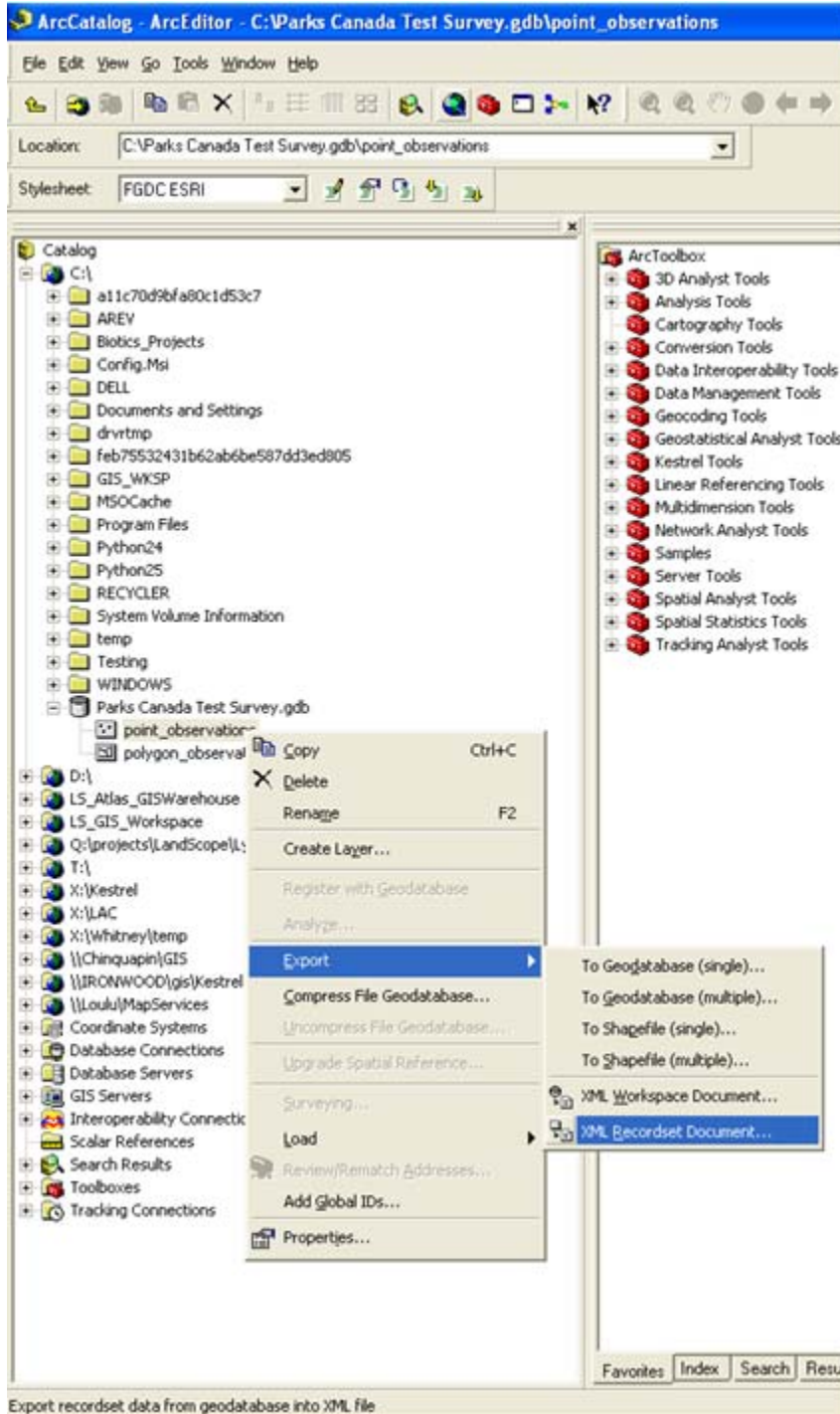
Be aware that new locations and person records are entered before an observation is saved. Therefore, new person records and locations may be added to the system even if an observation record cannot be processed.

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.

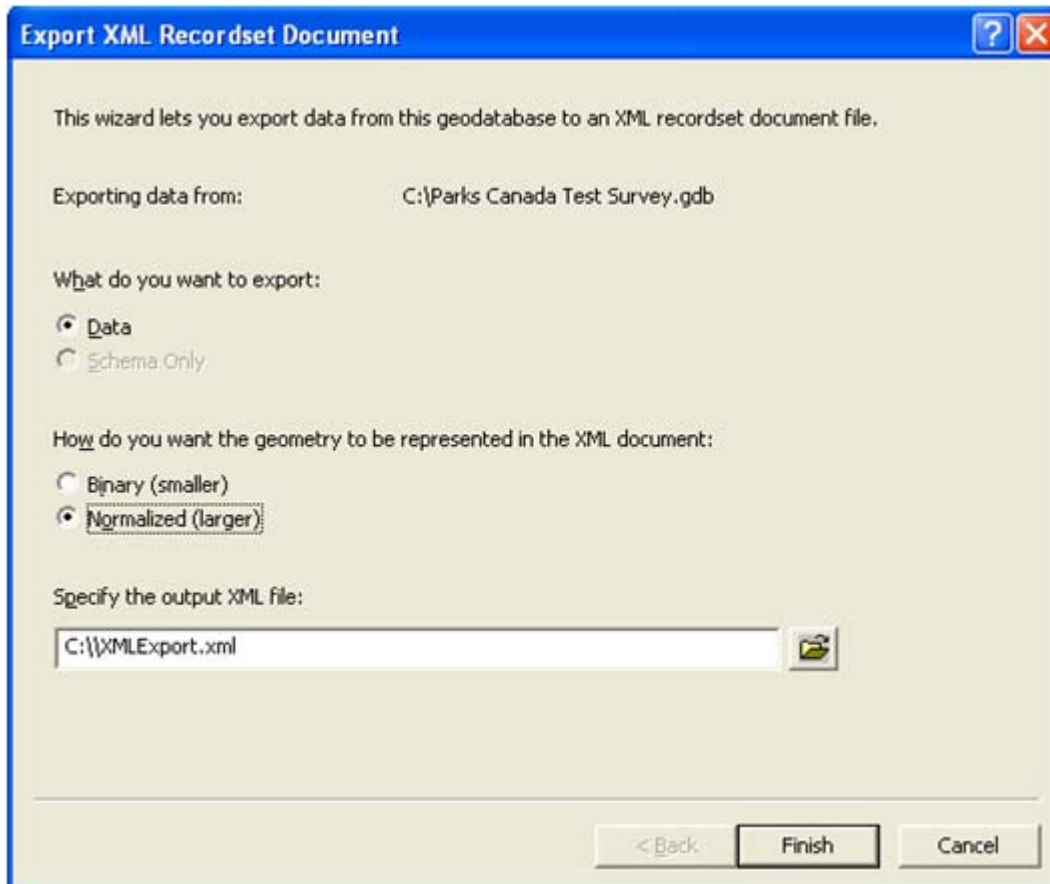


4. Within the *Export XML Recordset Document* window, select **Normalized (larger)** and browse to the location where you would like to save the output XML file. Click **Finish**.

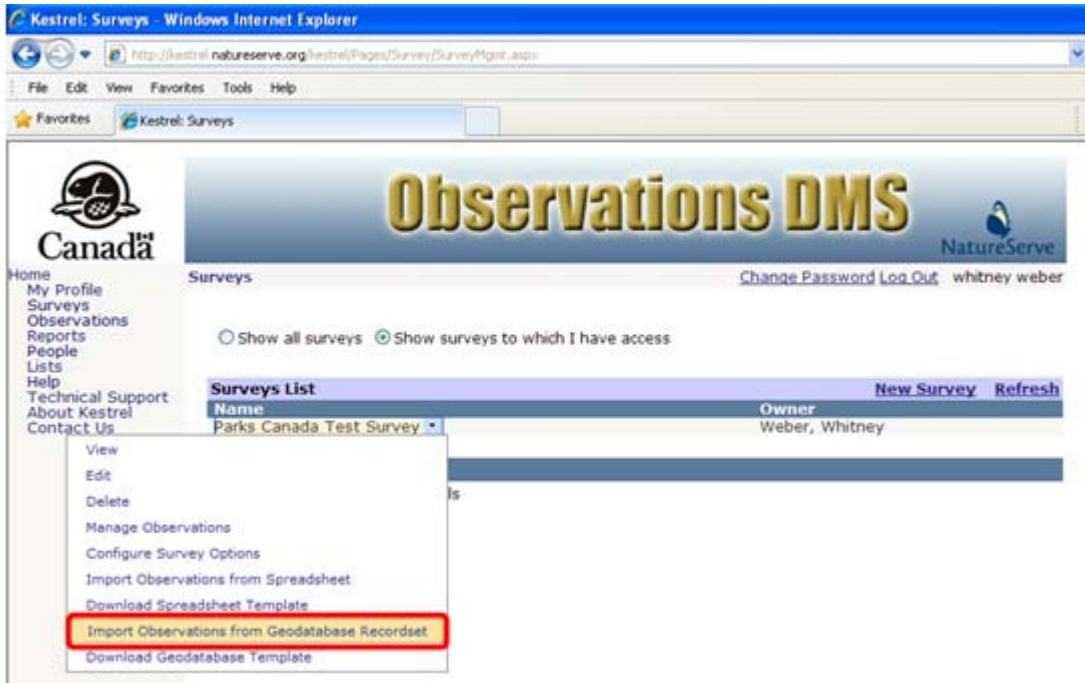
NOTE: Failing to select Normalized (larger) will result in the following error when importing the Recordset:

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.



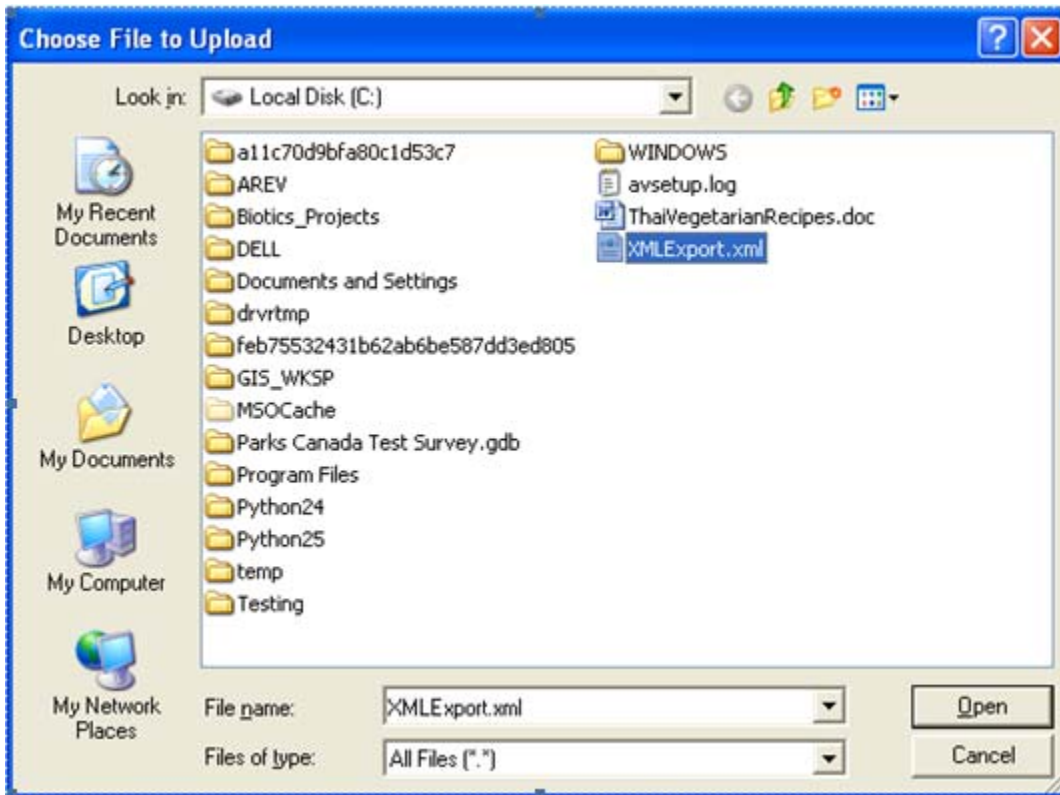
5. In Kestrel, within the *Surveys* page, click on the desired survey into which to import the observations and choose **Import Observations from Geodatabase Recordset**.



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**.



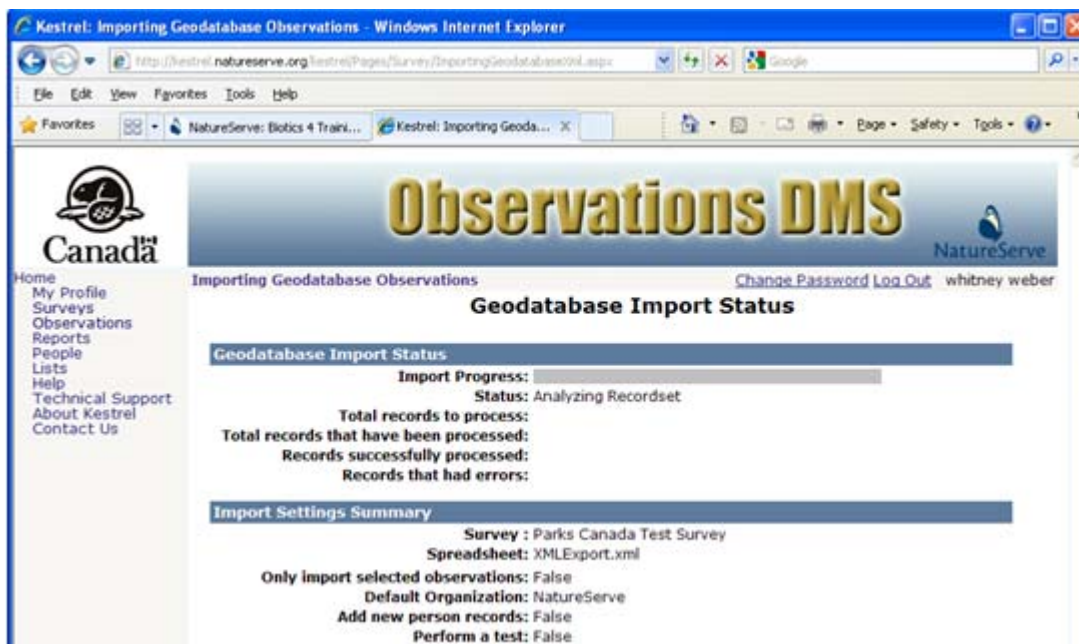
8. Complete the remaining import options, detailed below, as applicable prior to clicking **Import Observations** or **Cancel**.
- **Only import selected observations:** If checked, only observations that are specifically flagged will be imported. If unchecked, all observations without a Kestrel ID value 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.



- 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.

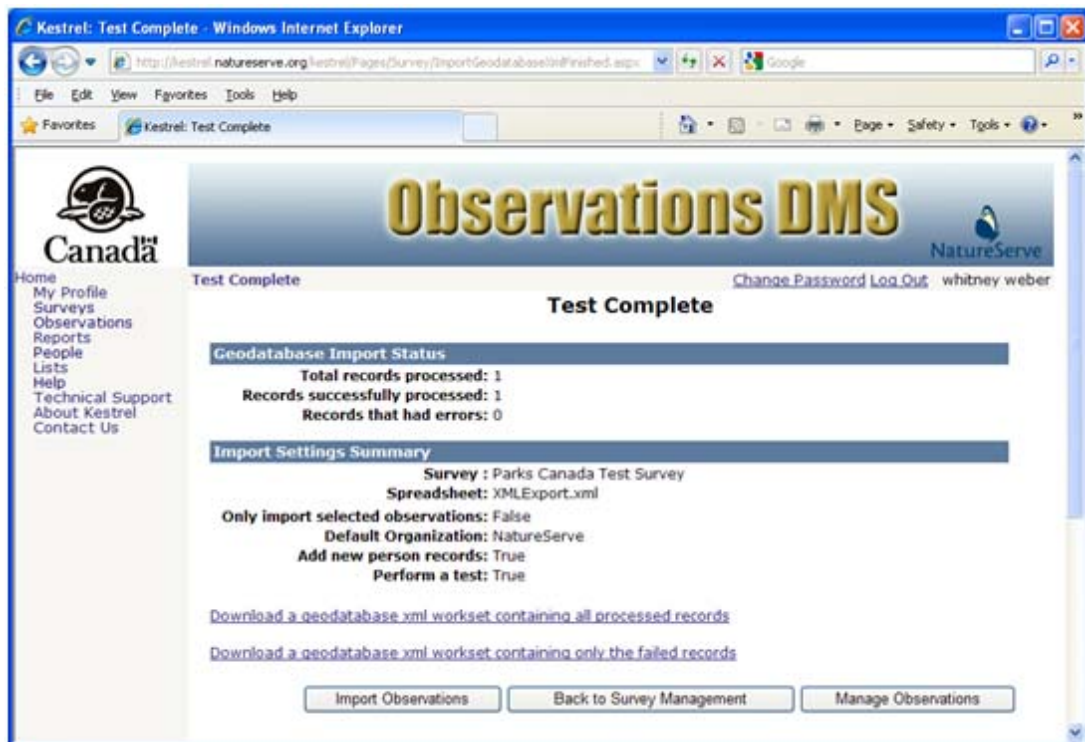
NOTE: If you failed to export the XML Recordset Document as Normalized (larger) you will receive the following error:

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.

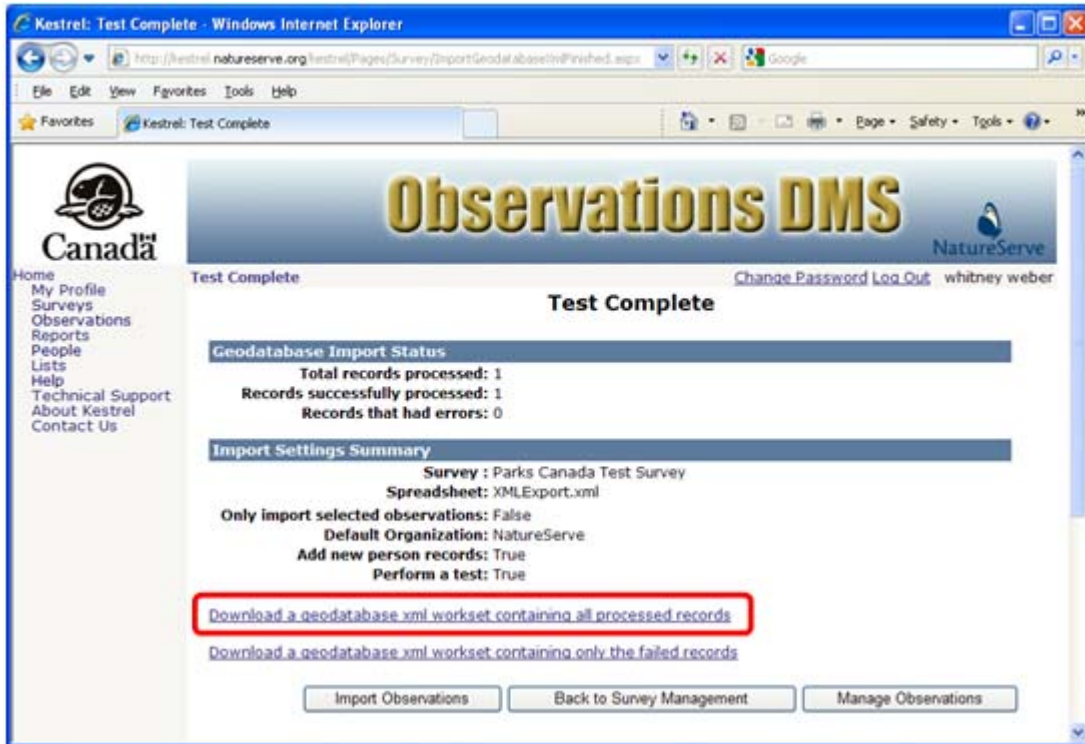


Related Tasks:

- [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

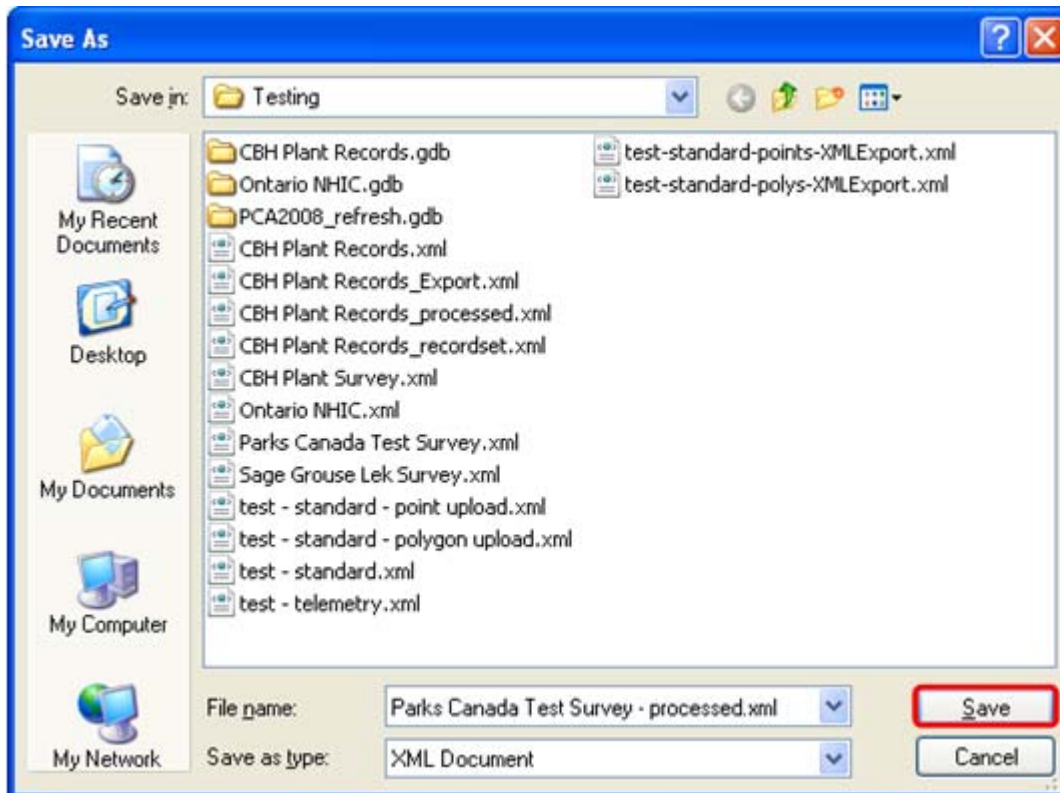
1. Within the *Test/Import Complete* page, select to **Download a geodatabase xml workset containing all processed records** to review both imported and failed rows.



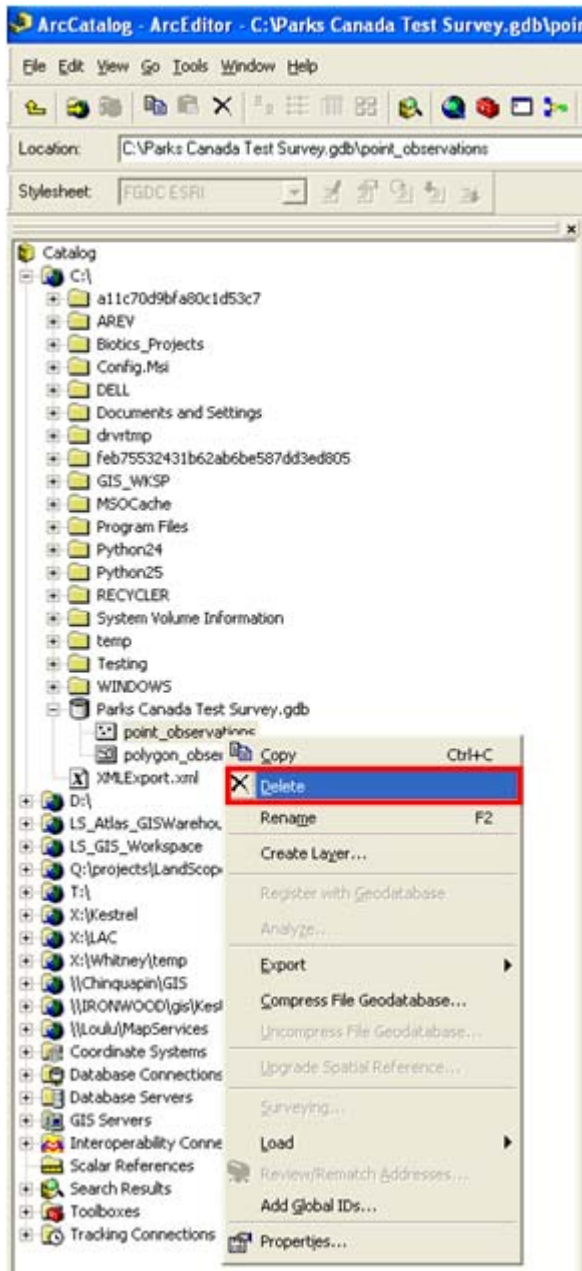
2. Choose to **Save** the file.



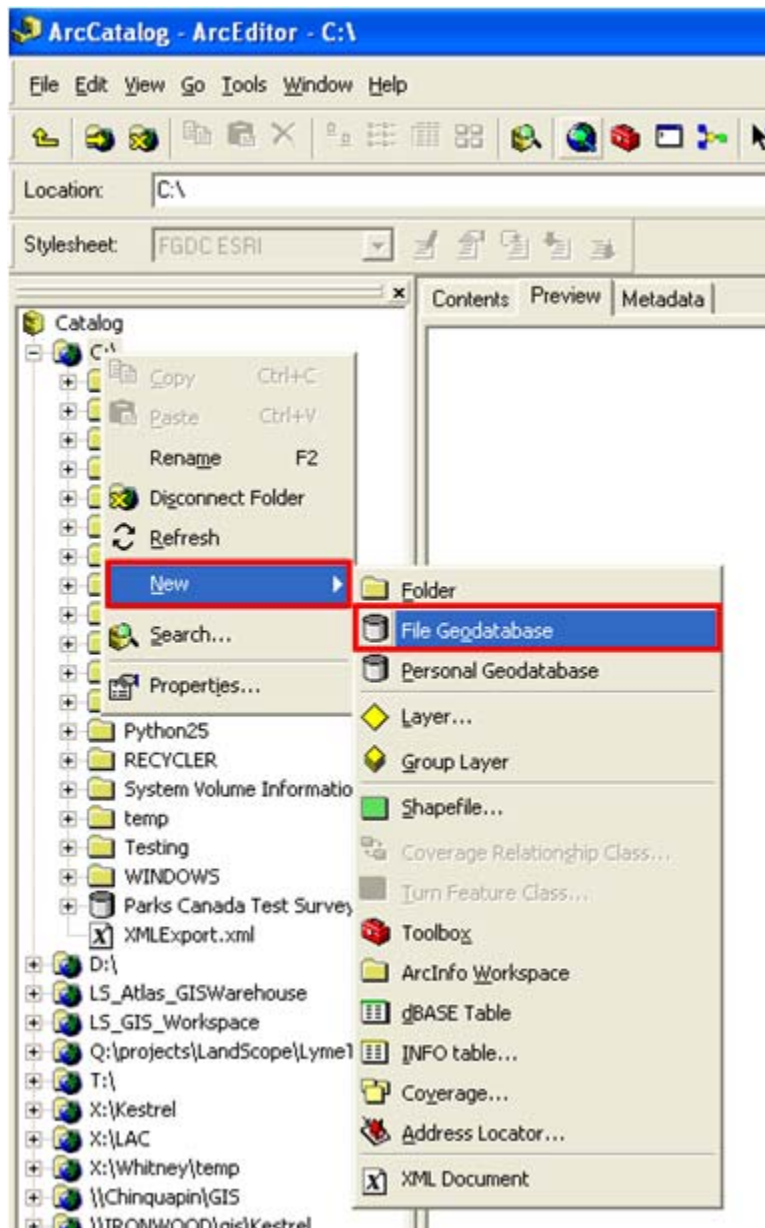
3. Within the Save As window, navigate to where you would like it saved and name it as desired.



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**.

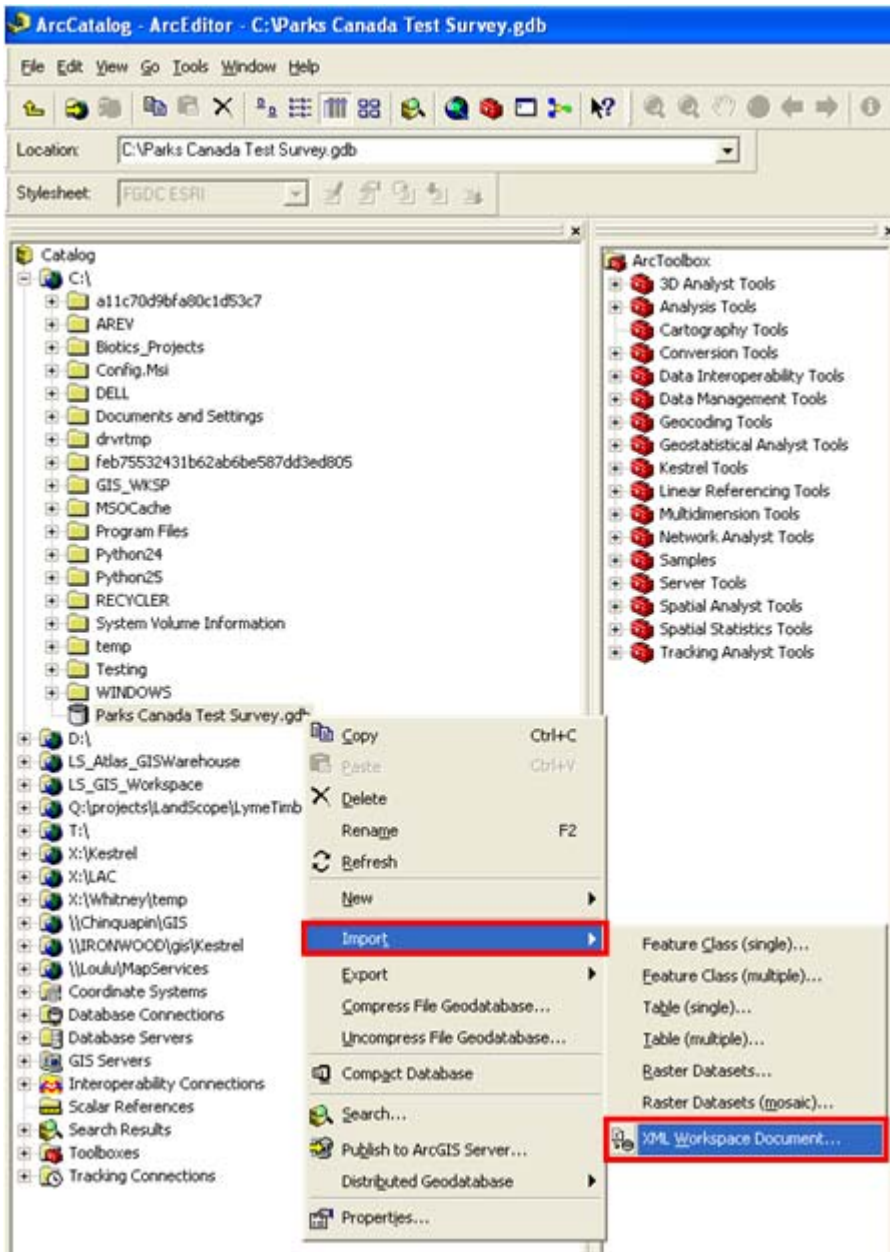


- Create a new geodatabase to hold the processed records. To do so, right click on the directory where you would like to create the new geodatabase and choose **New, File Geodatabase** (either File or Personal Geodatabase). Rename the file as desired.

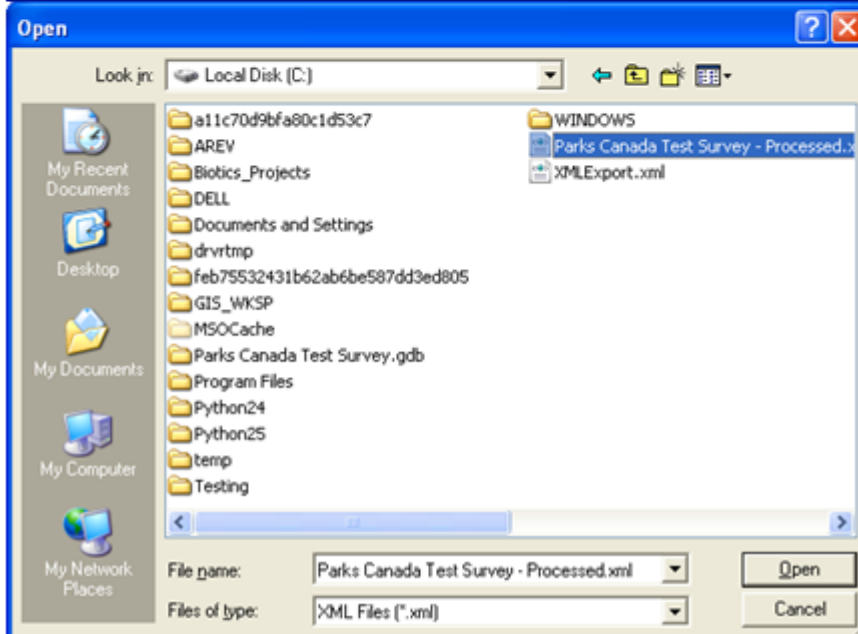
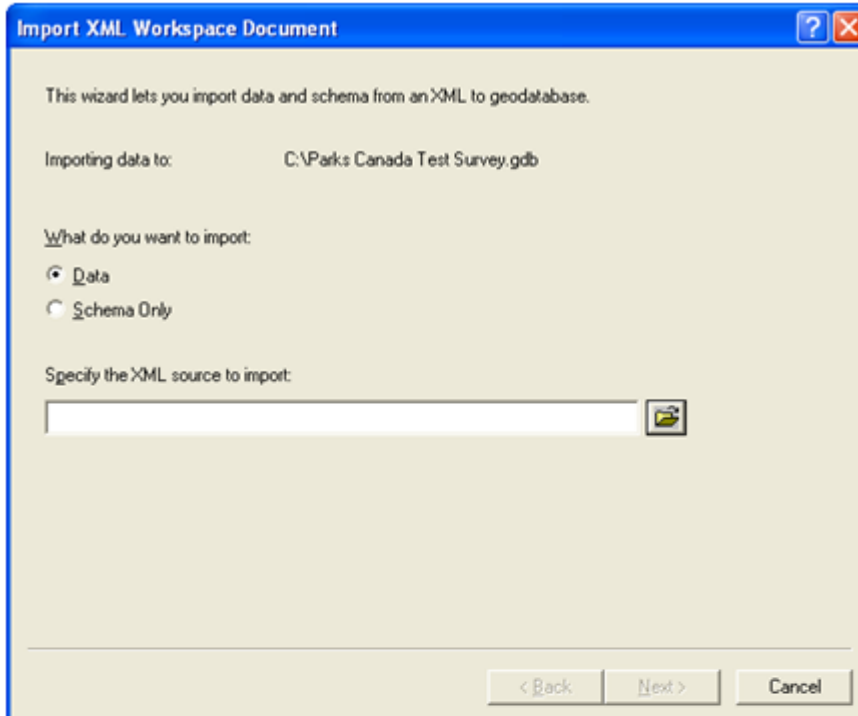


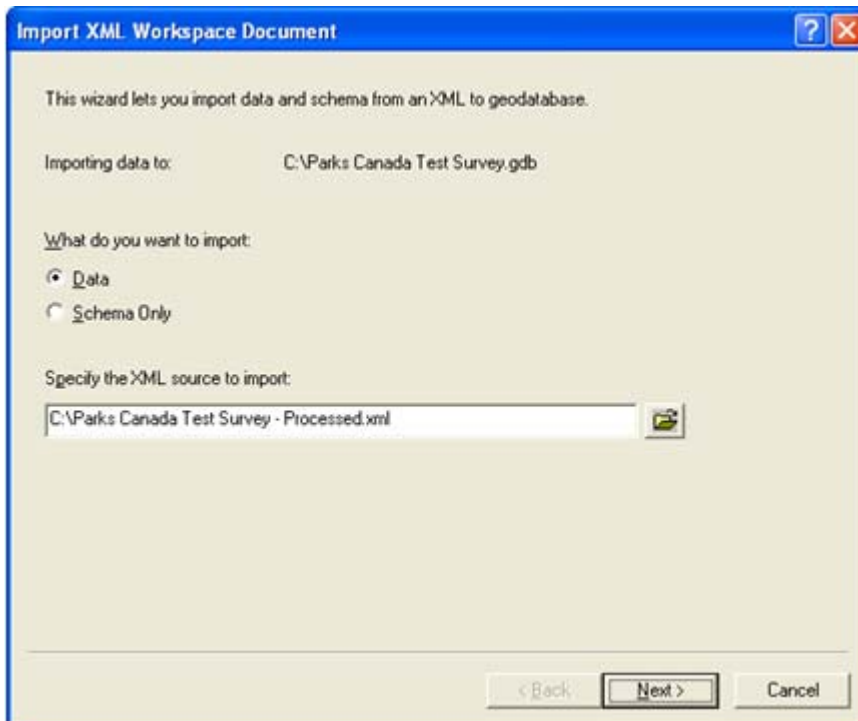
5. Right click on the geodatabase into which you will import the processed geodatabase xml workset and choose **Import, XML Workspace Document**.

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

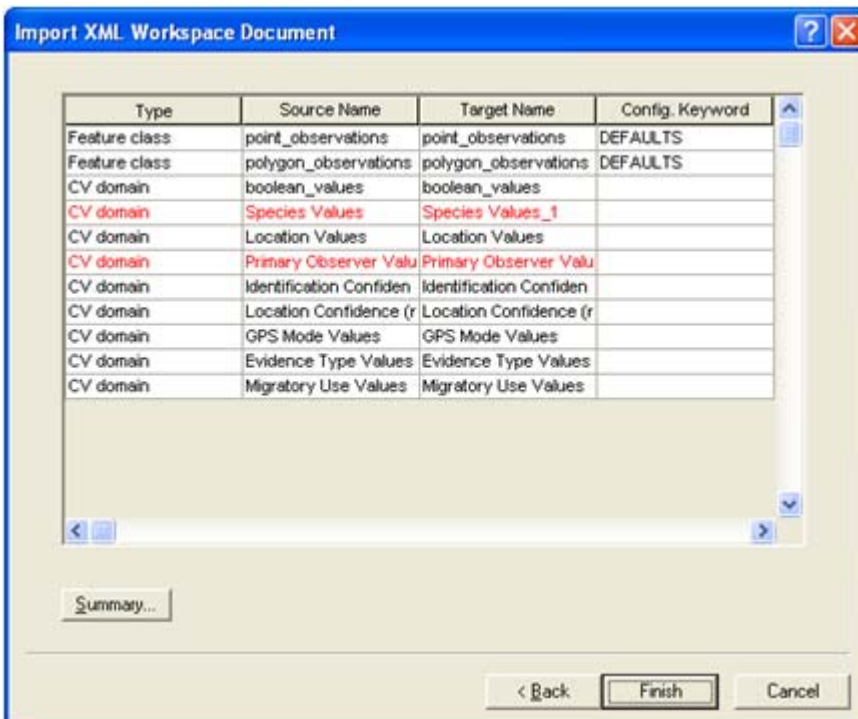


6. In the *Import XML Workspace Document* window, select **Data** and browse to where you saved the xml in Step 2 and click **Next**.

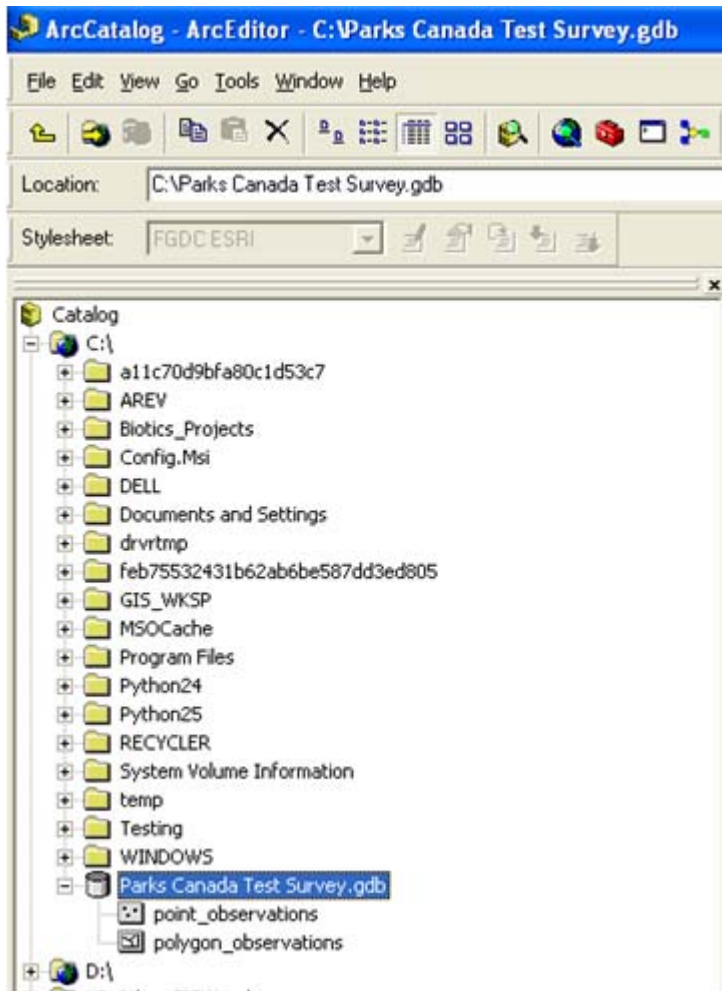




7. In the next window, choose **Finish**.



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:

The screenshot shows a table view titled 'Attributes of point_observations'. The table has the following columns: OBJECTID, SHAPE, Kestrel ID, Import Observations?, Species (REQ'D), Species Search Value, Species Comments, and Observation Date Start (REQ'D). The first row contains the following data: 1, Point, 00372, TRUE, Turus nigratus [ELEMENT_NAT/OVAL_2_16292], Turus nigratus, -Null, 3/4/1972.

OBJECTID	SHAPE	Kestrel ID	Import Observations?	Species (REQ'D)	Species Search Value	Species Comments	Observation Date Start (REQ'D)
1	Point	00372	TRUE	Turus nigratus [ELEMENT_NAT/OVAL_2_16292]	Turus nigratus	-Null	3/4/1972

- **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

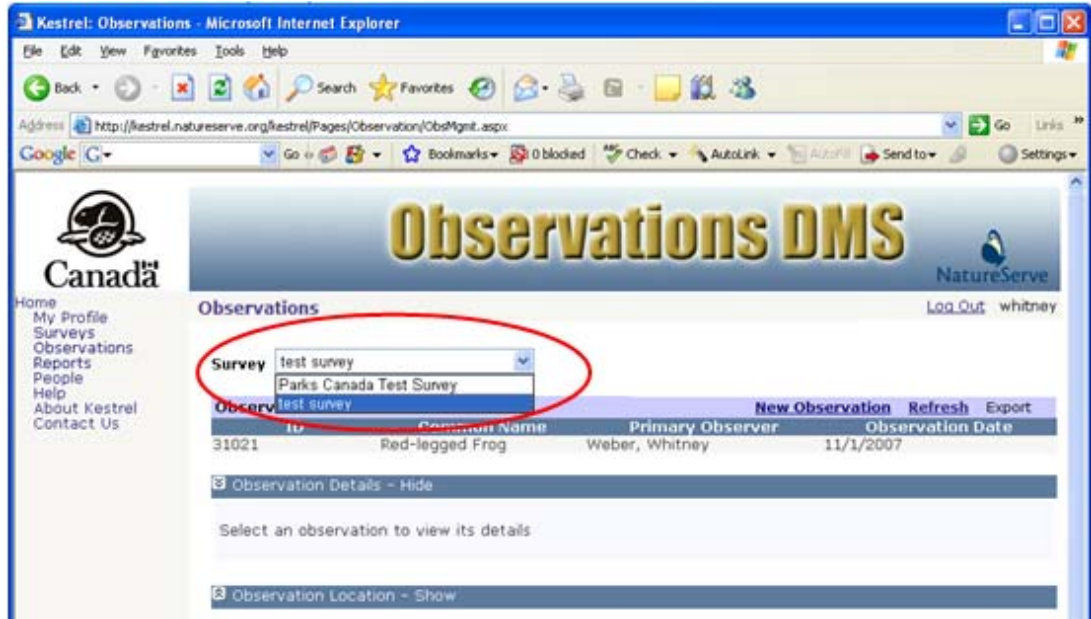
Tasks:

- [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](#)

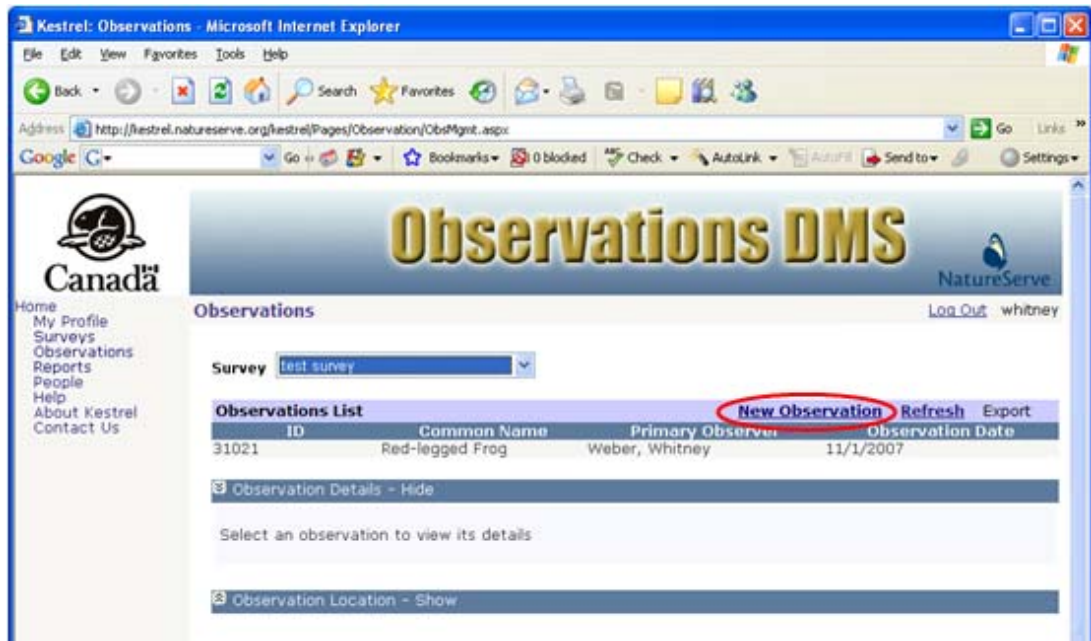
Methods of Navigation:

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.

Kestrel: Observations - Microsoft Internet Explorer

Address: http://kestrel.natureserve.org/kestrel/Pages/Observation/ObstMgmt.aspx

Canada NatureServe

Observations Log Out: whitney

Survey: test survey

ID	Common Name	Primary Observer	Observation Date
31021	Red-legged Frog	Weber, Whitney	11/1/2007

Observations List New Observation Refresh Export

View Edit Delete

Observation to view its details

Observation Location - Show

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

Kestrel: Observations - Microsoft Internet Explorer

Address: http://kestrel.natureserve.org/kestrel/Pages/Observation/ObstMgmt.aspx

Canada NatureServe

Observations Log Out: whitney

Survey: test survey

ID	Common Name	Primary Observer	Observation Date
31021	Red-legged Frog	Weber, Whitney	11/1/2007

Observations List New Observation Refresh Export

Observation Details - Hide

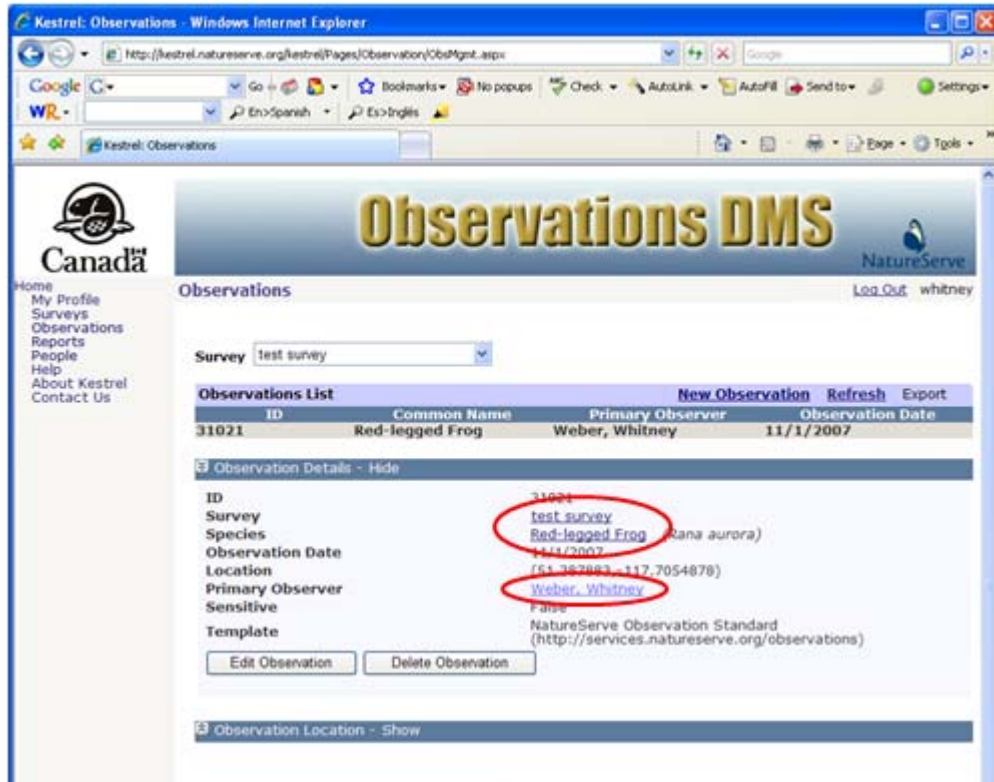
ID: 31021
 Survey: test survey
 Species: Red-legged Frog (*Rana aurora*)
 Observation Date: 11/1/2007
 Location: (51.387883, -117.7054878)
 Primary Observer: Weber, Whitney
 Sensitive: False
 Template: NatureServe Observation Standard (http://services.natureserve.org/observations)

Edit Observation Delete Observation

Observation Location - Show

- 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:

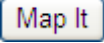
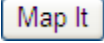
Foreign Key from:

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:

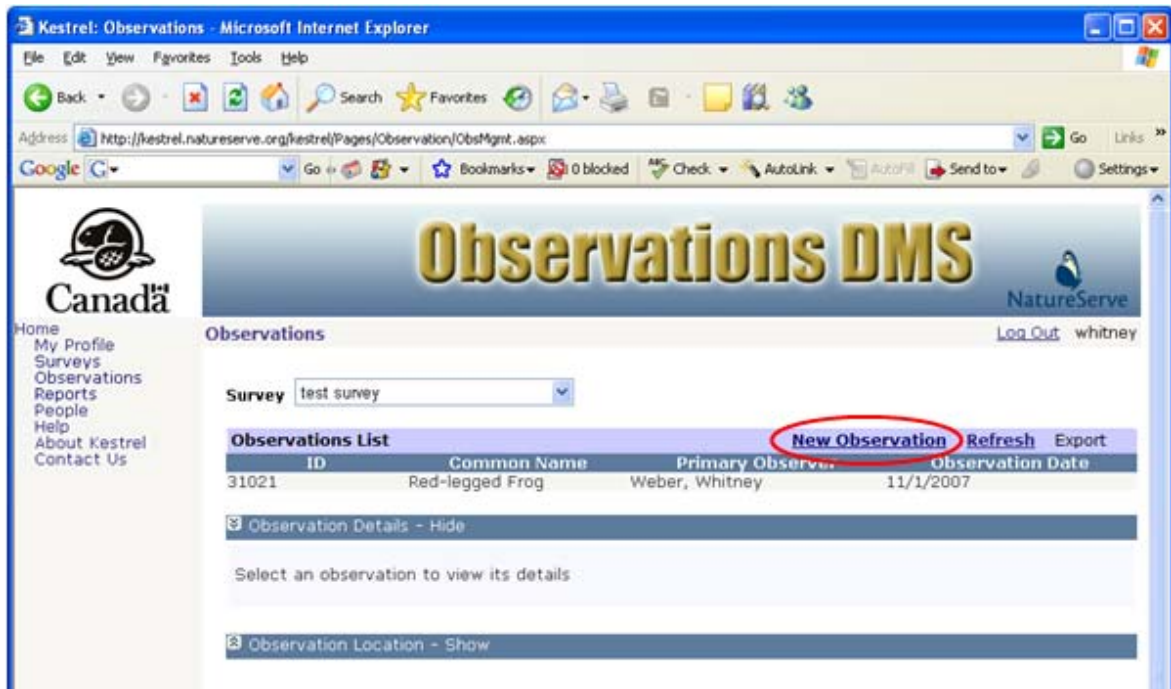
Column Name:

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.

The screenshot shows the 'Kestrel: Edit Observation' page in a Windows Internet Explorer browser. The page title is 'Observations DMS' and the user is logged in as 'jennifer nichols'. The page displays a confirmation message: 'The observation was saved.' Below this, there is a form for editing an observation. The form includes the following fields:

- Species:** American Marten (with a dropdown arrow and a small icon)
- Observation Date:** 11/6/2007 (with a calendar icon)
- Location:** Plot Survey 362 (with a dropdown arrow, a 'Map It' button, and an 'Enter Coordinates' button)
- Primary Observer:** Weber, Whitney (with a dropdown arrow and a small icon)
- Sensitive:**

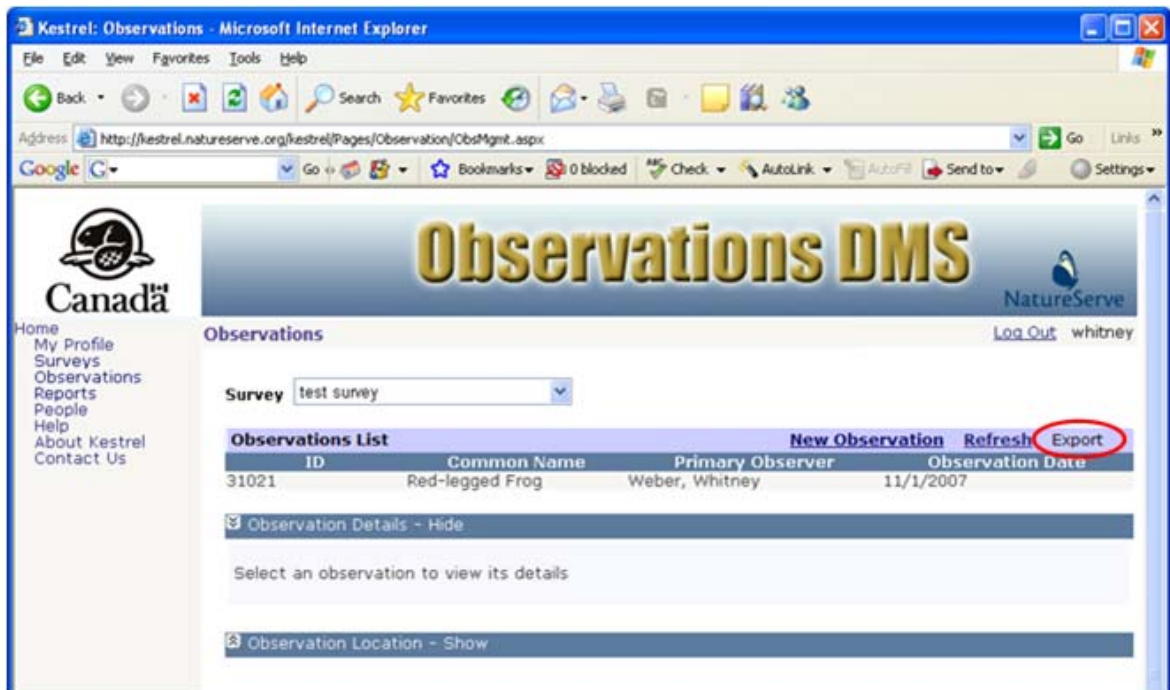
At the bottom of the form, there are four buttons: 'Save & Close', 'Save', 'Save & Copy', and 'Cancel'. The 'Save & Close' button is circled in red.

Related Tasks:

- [Select a Species](#)
- [Create Location](#)
- [Name a Location](#)
- [Edit Location](#)
- [Select Primary Observer](#)

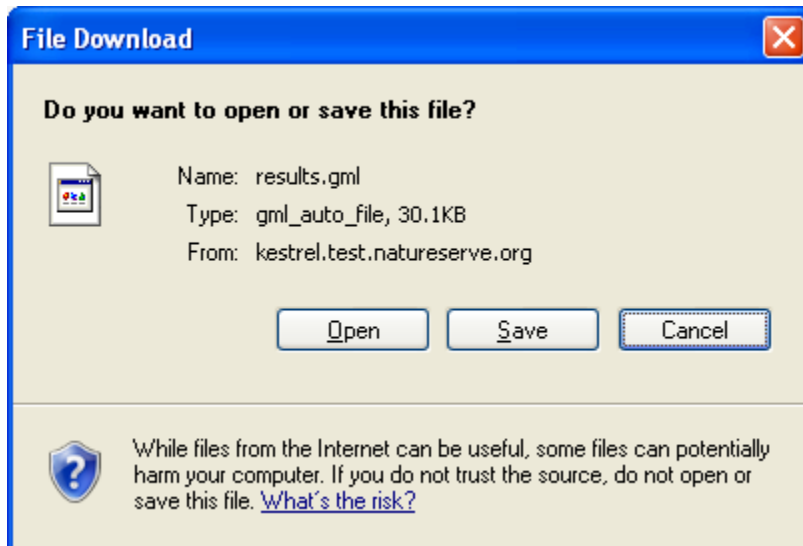
Export Observations

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



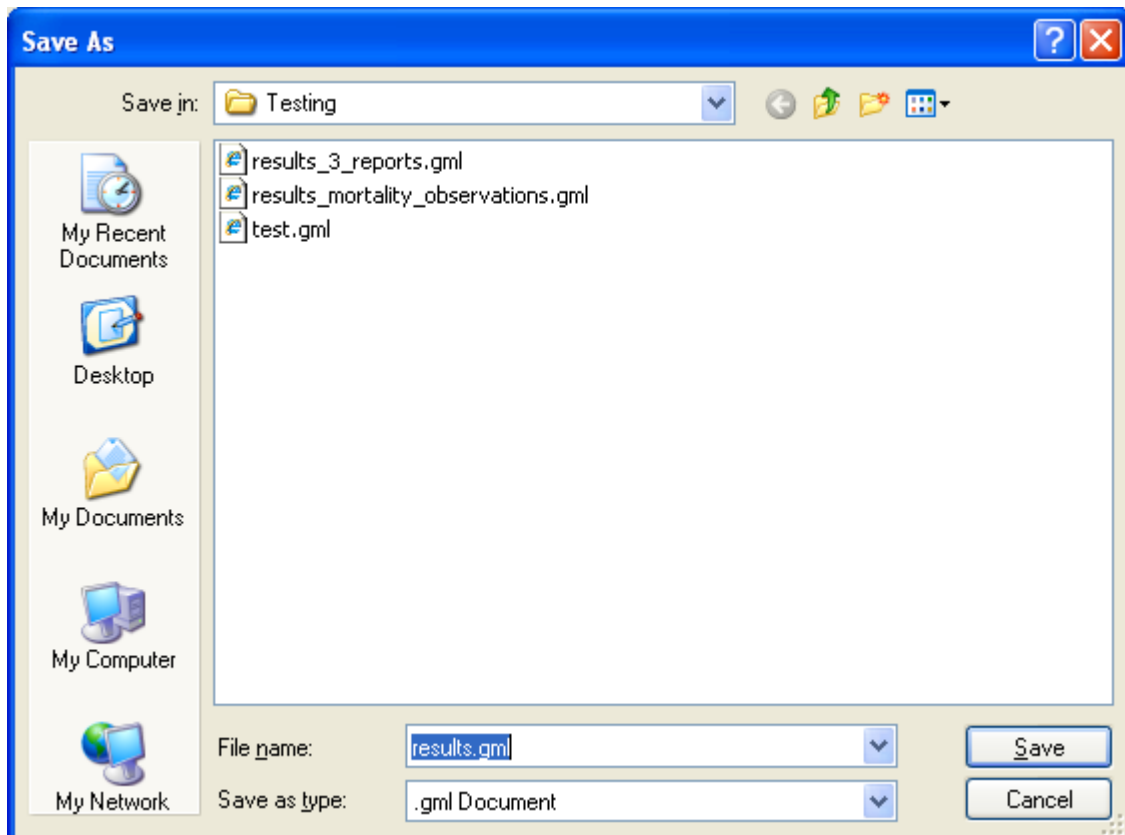
NOTE: Depending on the amount of data, the export process can take a number of minutes.

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.

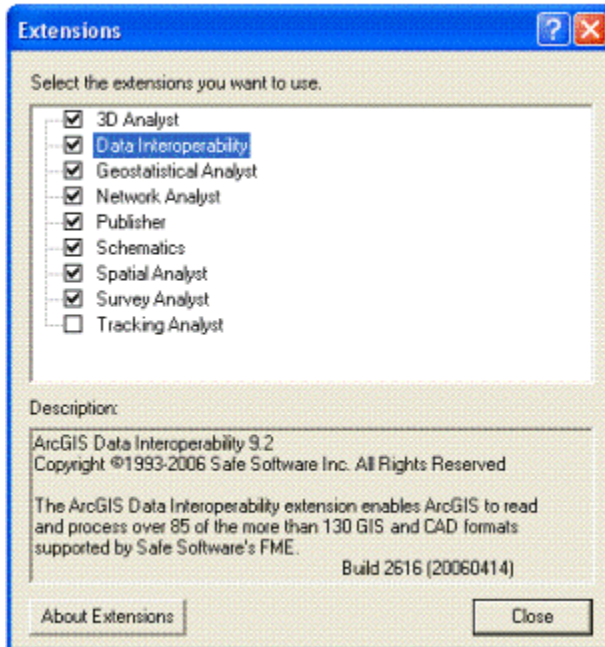


Related Tasks:

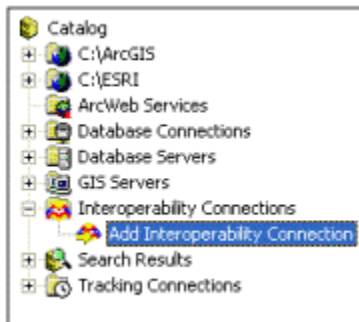
- [Import GML](#)

Import GML

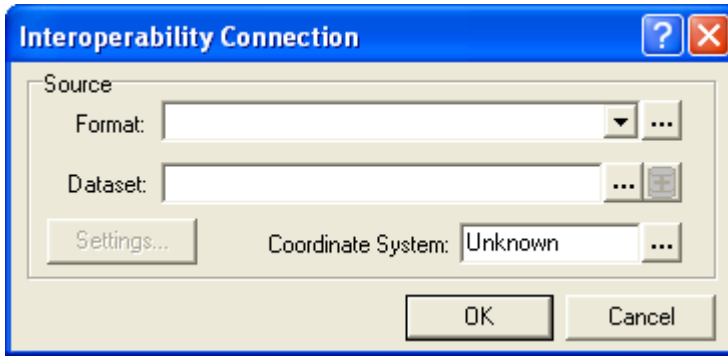
1. In ArcCatalog, enable the Data Interoperability Extension: from the Tools menu, click Extensions and ensure that you have checked on Data Interoperability.



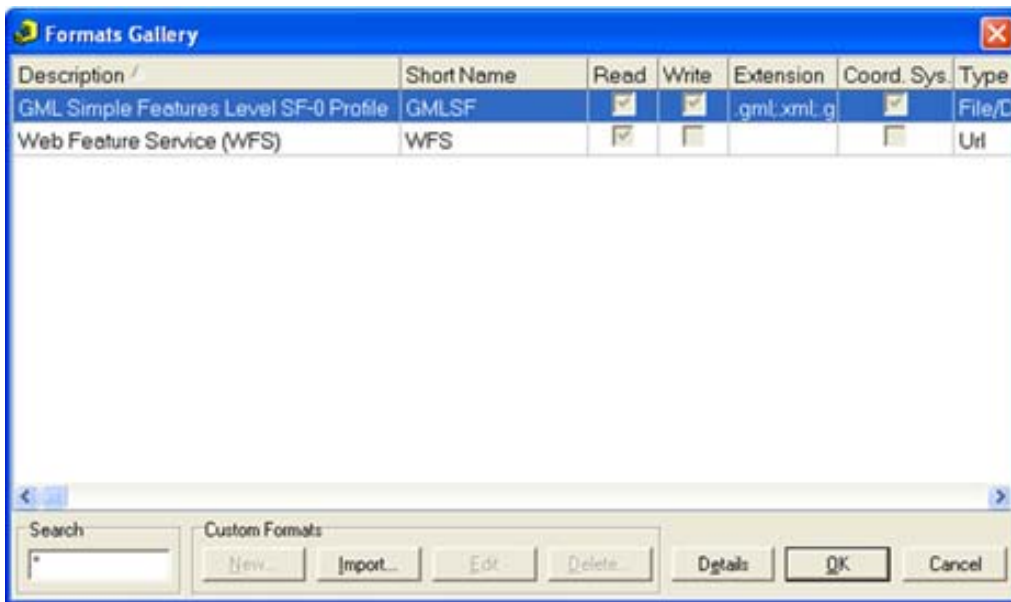
2. Add a new interoperability connection by double-clicking on "Add interoperability connection."



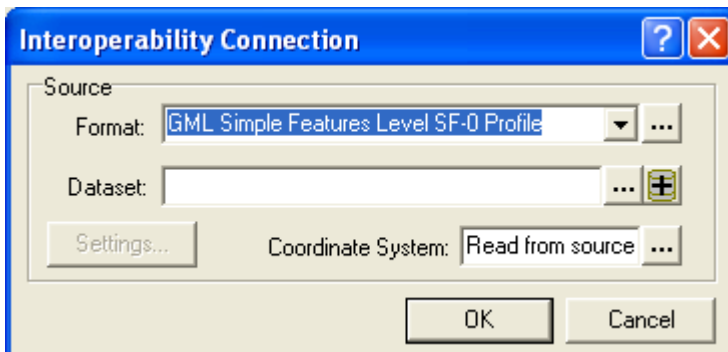
3. Click the browse.png button for Format to open the Formats Gallery.



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

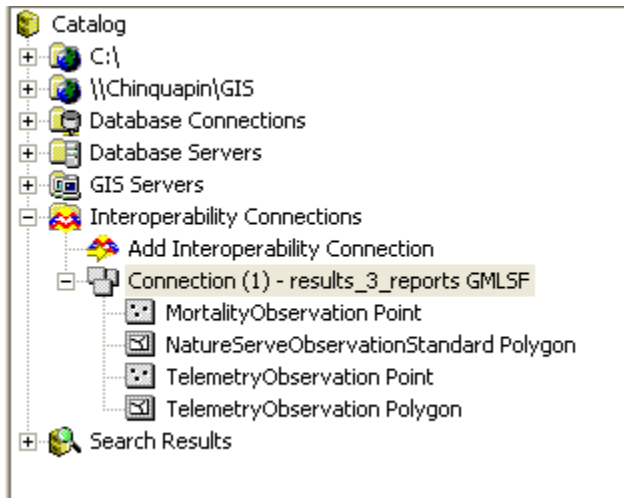


5. Click the  button for Dataset and navigate to the GML file that you downloaded.



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


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

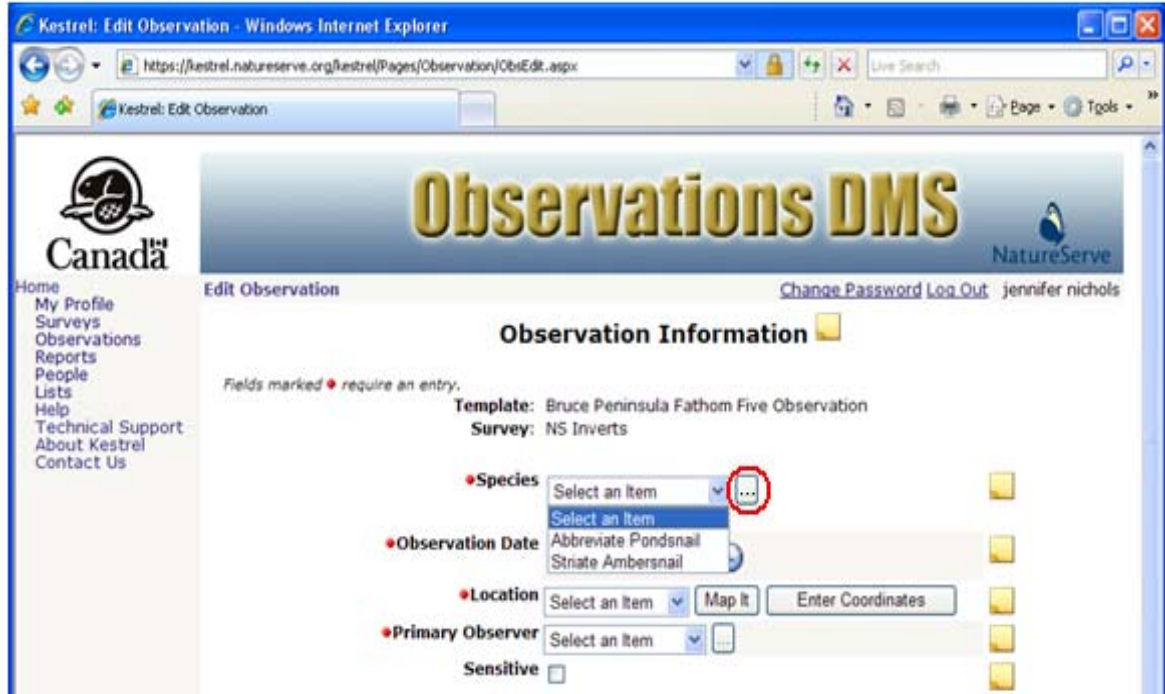


Related Tasks:

- [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.

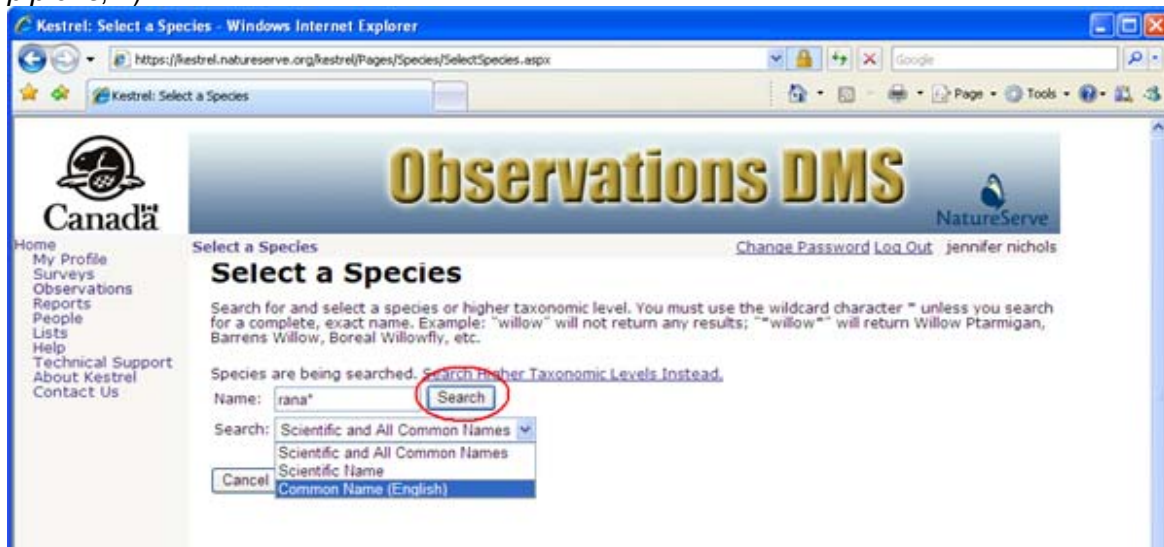


2. A species can be searched in one of two ways:
 - Use common or scientific name (at the genus and species level)
 - Use higher taxonomic levels

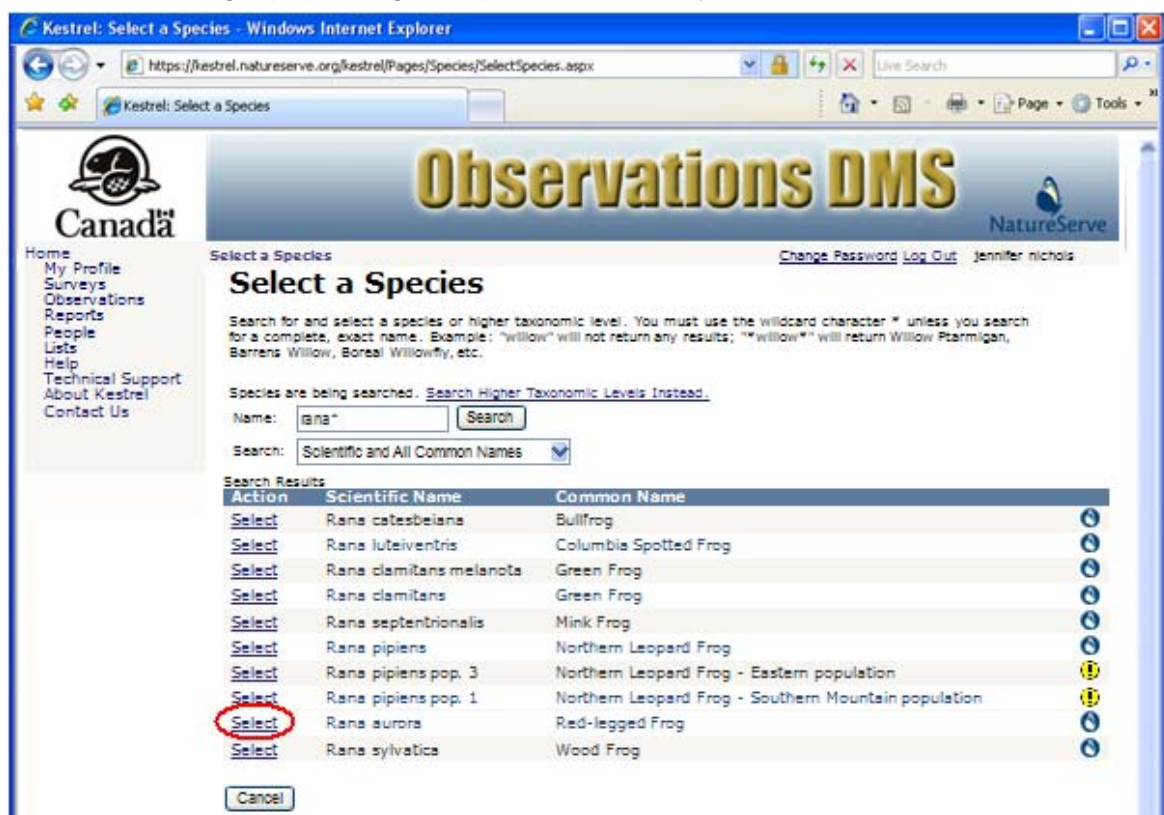
Use common or scientific name

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*,...)

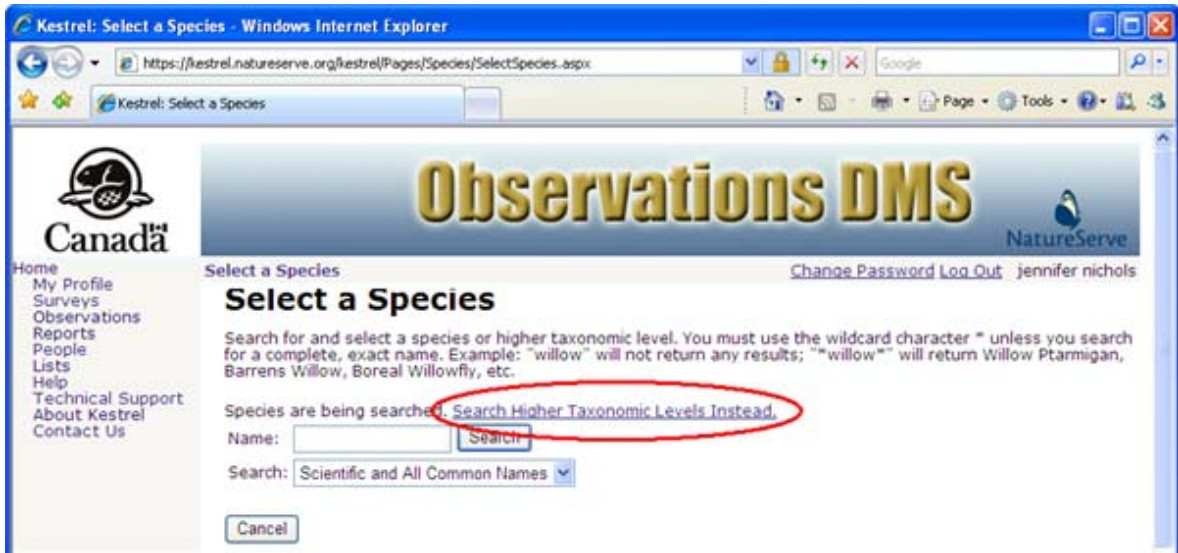


2. **Select** the appropriate species from Search Results, which will return you to the *Edit Observation* page, populating the Species field with your selection.



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.

Kestrel: Select a Species - Windows Internet Explorer

https://kestrel.natureserve.org/kestrel/Pages/Species/SelectSpecies.aspx

Kestrel: Select a Species

Canada

Observations DMS

NatureServe

Home
My Profile
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Select a Species [Change Password](#) [Log Out](#) jennifer nichols

Select a Species

Search for and select a species or higher taxonomic level. You must use the wildcard character * unless you search for a complete, exact name. Example: "willow" will not return any results; "*"willow*" will return Willow Ptarmigan, Barrens Willow, Boreal Willowfly, etc.

Higher Taxonomic Levels are being searched. [Search Species Instead.](#)

Name:

Kingdom:

Search Results

Action	Scientific Name	Common Name	
Select	Amburana	no common name	!
Select	Dicranaceae	no common name	!
Select	Dicranales	no common name	!
Select	Fletcherana	no common name	!
Select	Granatellus	no common name	!
Select	Metaporana	no common name	!
Select	Millegrana	no common name	!
Select	Phaedranassa	no common name	!
Select	Porana	no common name	!
Select	Provancherana	no common name	!
Select	Rana	no common name	!
Select	Ranalisma	no common name	!
Select	Ranatra	no common name	!
Select	Rapubarana	no common name	!
Select	Rupirana	no common name	!

1 2

Related Tasks:


- [Edit Observation](#)

Create New Location



A new location for an observation can be created by:

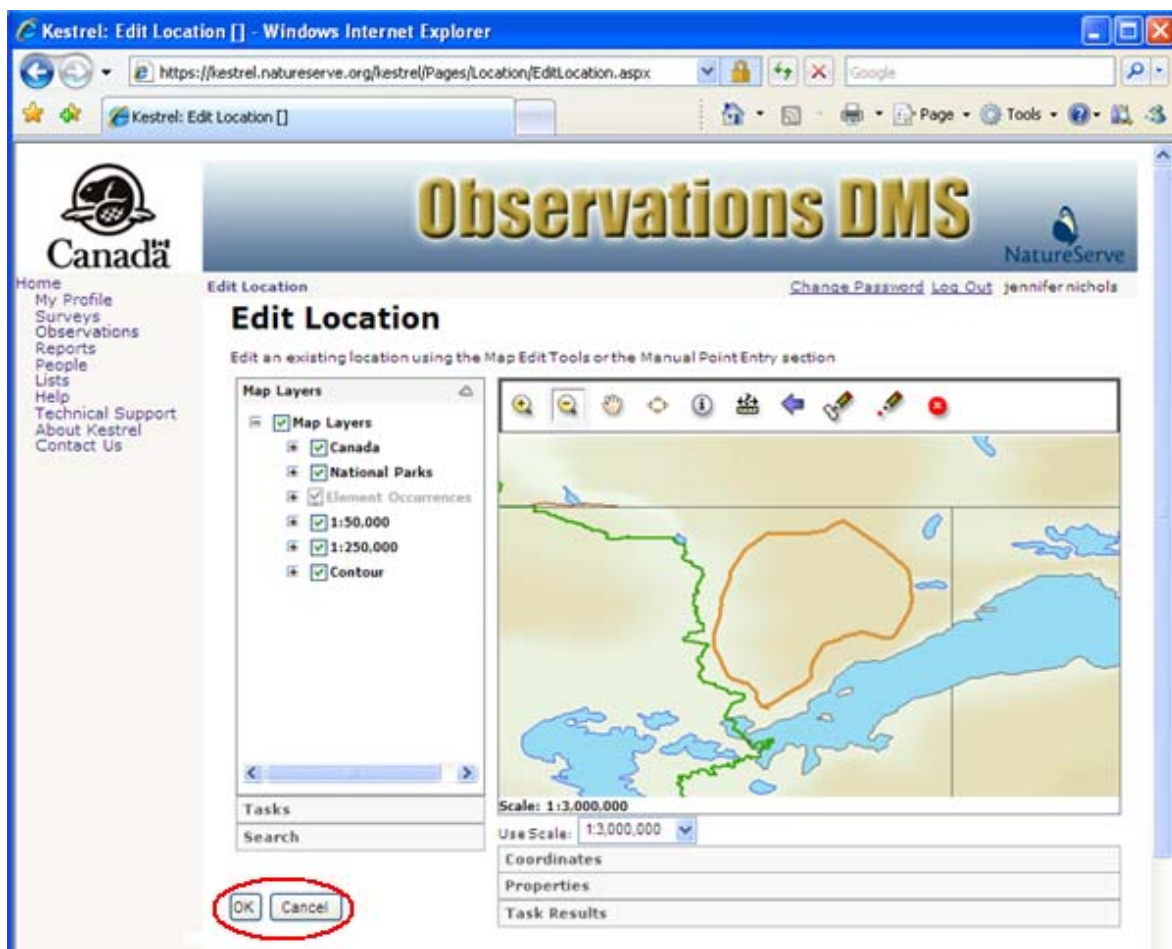
- Mapping it
- Entering coordinates

Map it

1. Within the *Edit Observation* page click the  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 "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 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**.

Kestrel: Edit Observation - Windows Internet Explorer

http://kestrel.natureserve.org/kestrel/Pages/Observation/ObsEdit.aspx

File Edit View Favorites Tools Help

Home My Profile Surveys Observations Reports People Lists Help Technical Support About Kestrel Contact Us

Observations DMS

NatureServe

Edit Observation [Change Password](#) [Log Out](#) whitney weber

Observation Information

Fields marked * require an entry.

Template: NatureServe Observation Standard
Survey: Parks Canada Test Survey

*Species: Red-legged Frog

Rana aurora

*Observation Date: 11/7/2010

*Location: Select an Item [Map It](#) [Hide Coordinates](#)

Datum: WGS84

Coordinates: Decimal Degrees UTM Coordinates

Latitude: Northing:

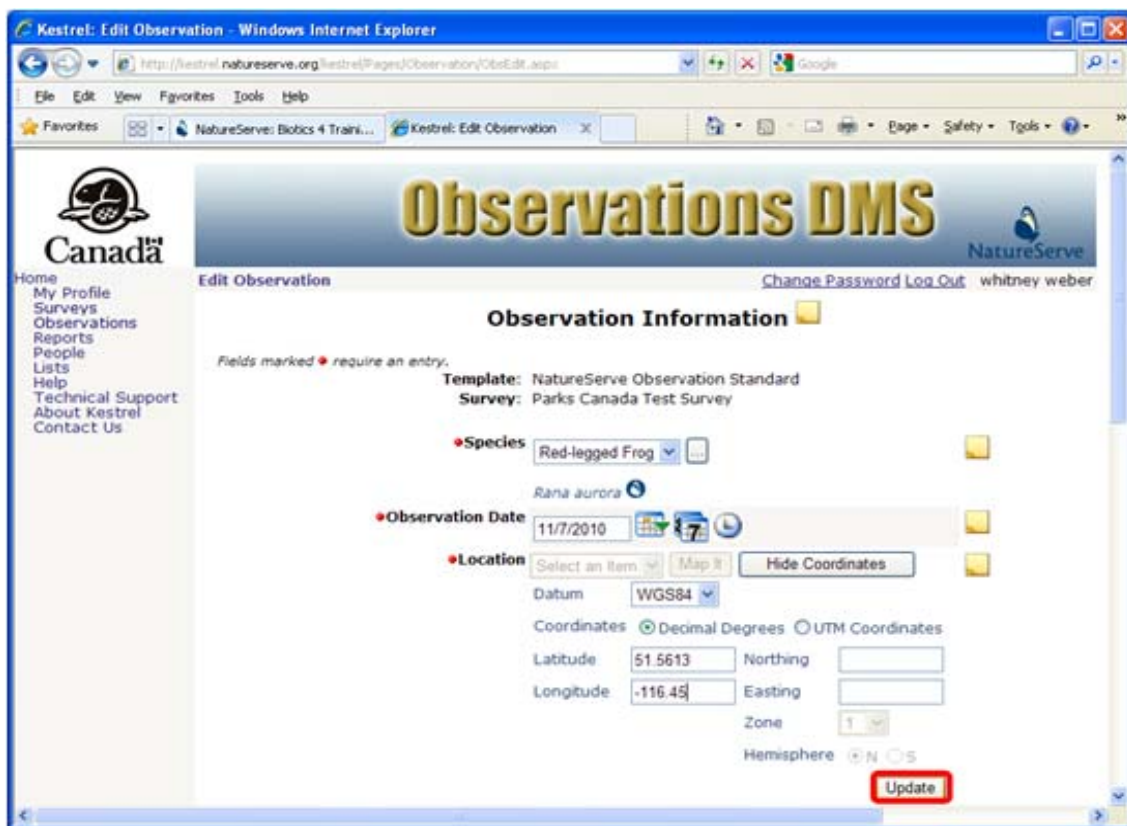
Longitude: Easting:

Zone: 1

Hemisphere: N S

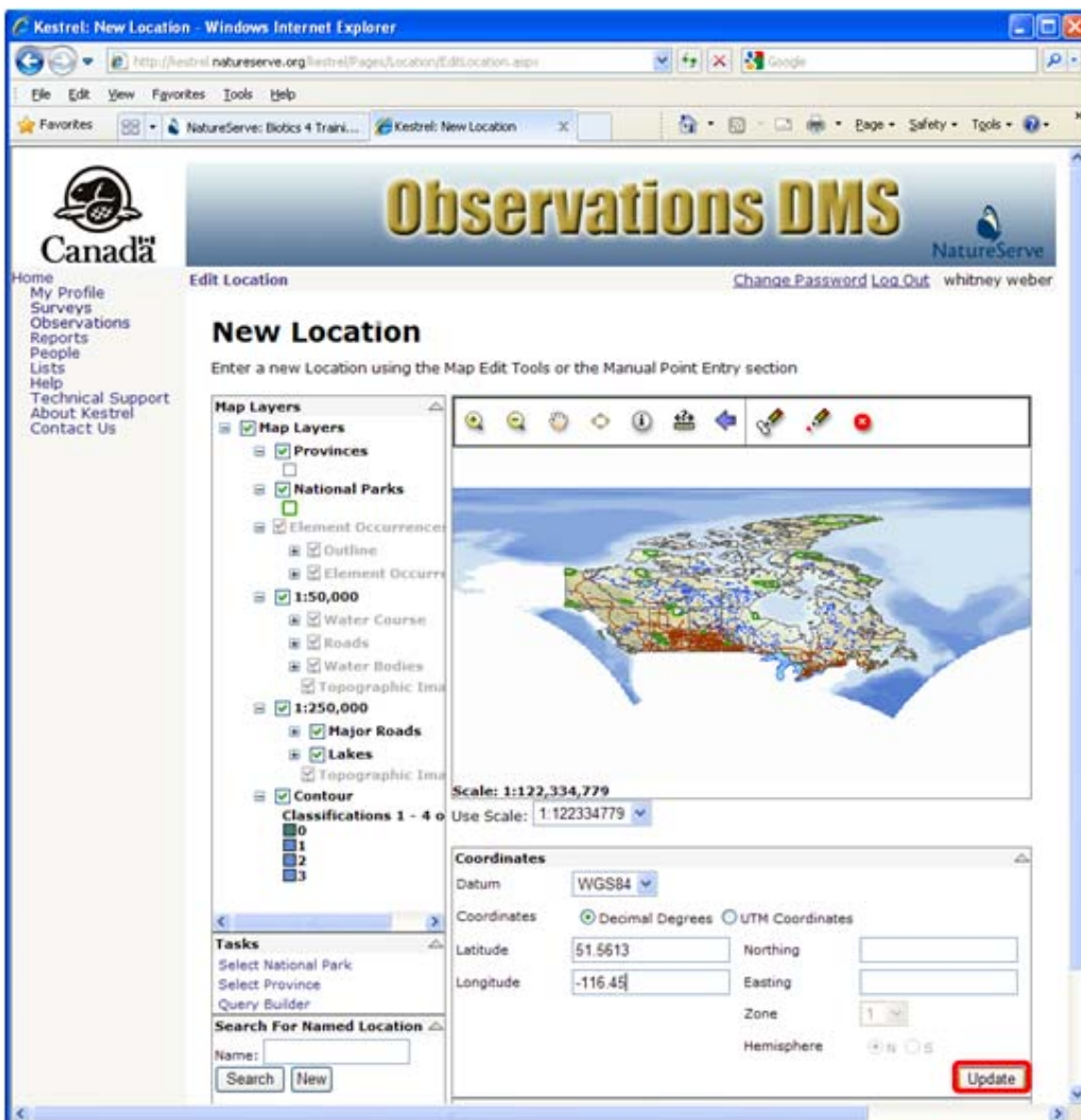
- When entering UTM Coordinates, indicate the UTM Zone, from the dropdown list, and Hemisphere, using the radio buttons, of the coordinates.

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 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, or click **CANCEL** to cancel the location creation and return to the *Edit Observation* page.




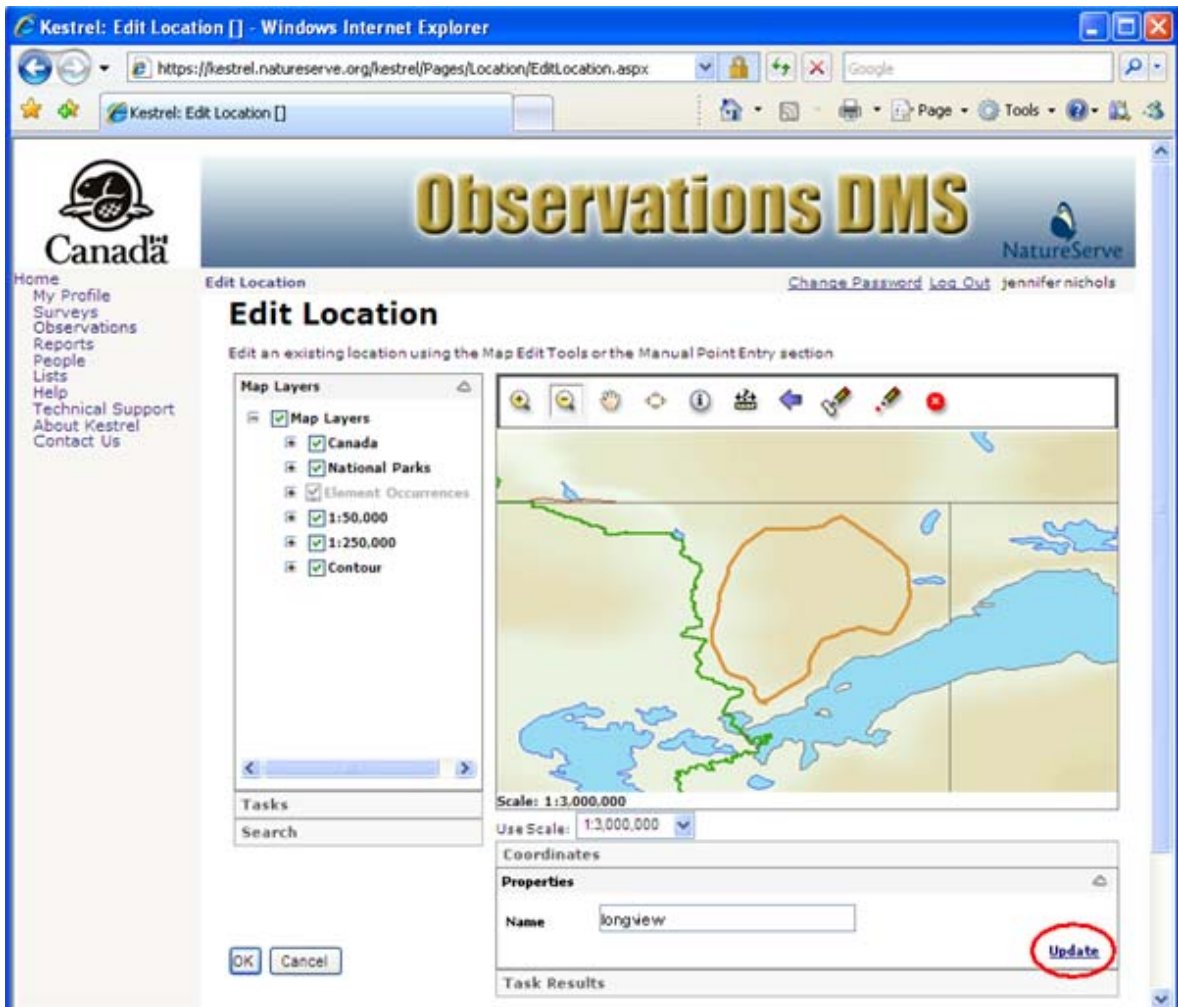
- Click **OK** to save the location and return to the *Edit Observation* page, or assign a name to the location, using instructions in the "Name a Location" section below.

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.

The screenshot shows a web browser window titled "Kestrel: Edit Location [] - Windows Internet Explorer". The address bar contains the URL "https://kestrel.natureserve.org/kestrel/Pages/Location/EditLocation.aspx". The page header features the "Canada" logo on the left and "Observations DMS" in large yellow text on the right, with the "NatureServe" logo below it. A navigation menu on the left includes links for Home, My Profile, Surveys, Observations, Reports, People, Lists, Help, Technical Support, About Kestrel, and Contact Us. The main content area is titled "Edit Location" and includes a sub-header "Edit an existing location using the Map Edit Tools or the Manual Point Entry section". Below this, there is a "Map Layers" panel with a tree view containing "Map Layers", "Canada", "National Parks", "Element Occurrences", "1:50,000", "1:250,000", and "Contour". A map of a region with a green boundary and an orange polygon is displayed. Below the map, there are controls for "Scale: 1:3,000,000" and "Use Scale: 1:3,000,000". A "Properties" section contains a "Name" field with the value "longview" and an "Update" button. At the bottom left, "OK" and "Cancel" buttons are circled in red. The browser's taskbar and address bar are also visible.

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):

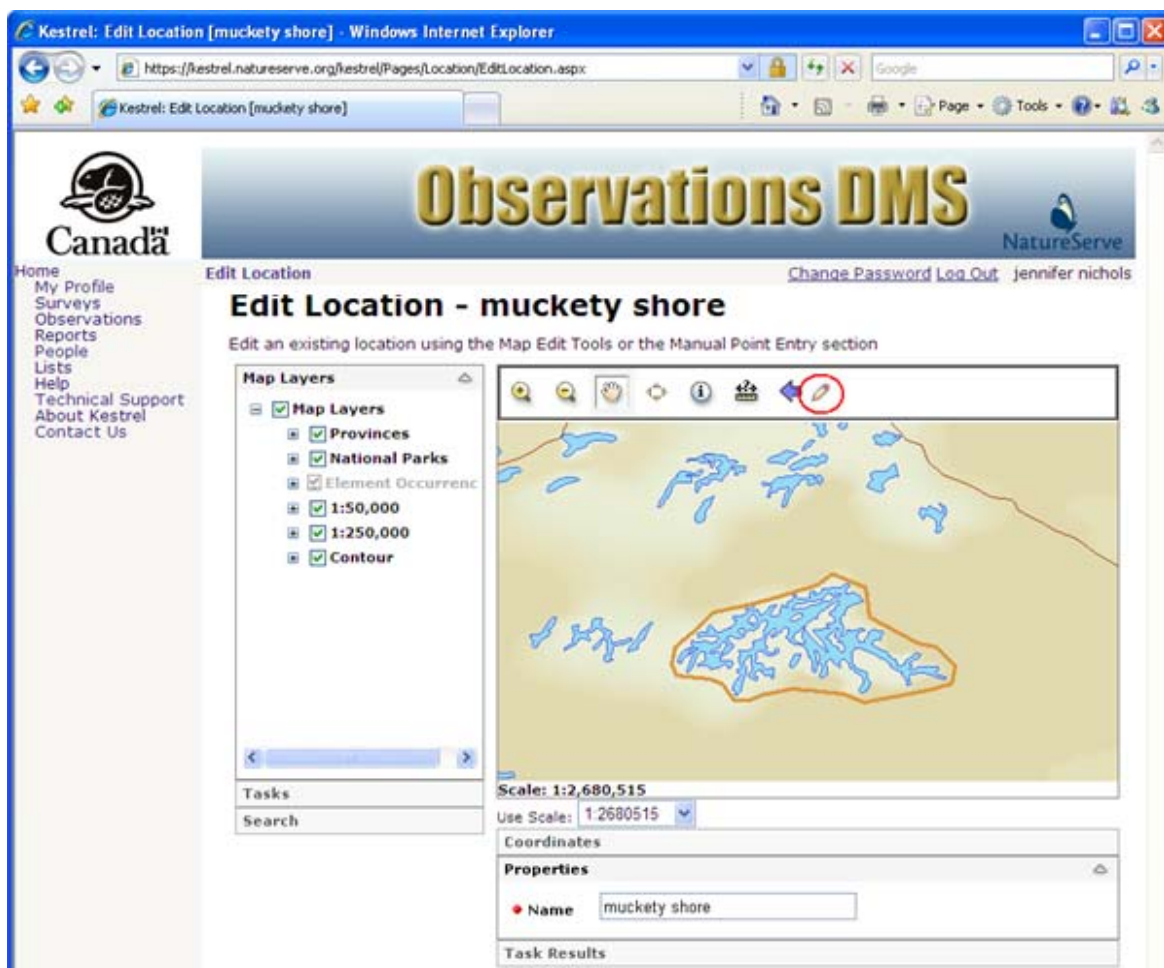
- Redraw the feature on the map
- Change the coordinates

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




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






- 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:

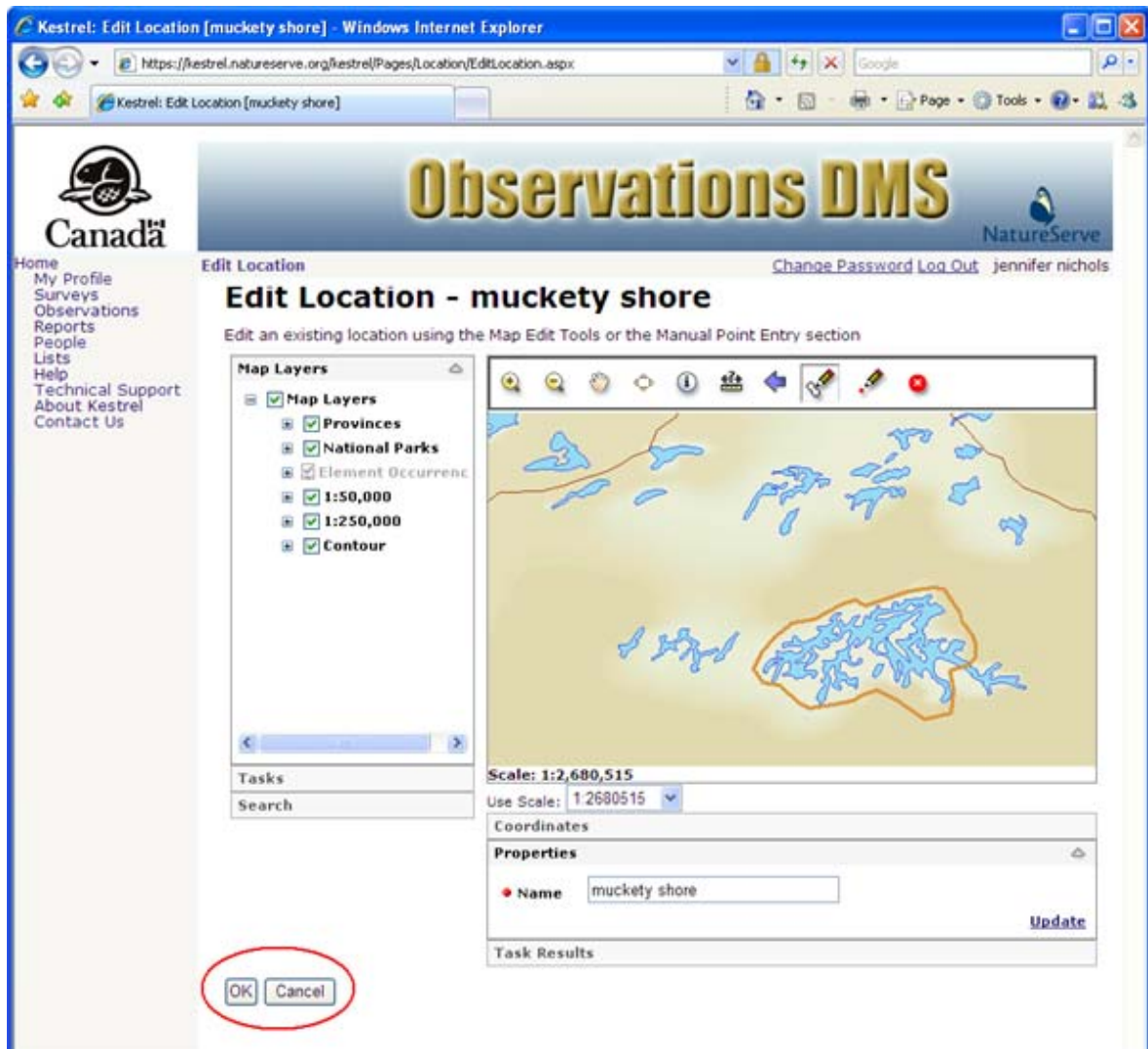
- Navigate to the desired location using the [Mapping Tools](#).
- Select the Draw Polygon tool .
- Draw the additional polygon, using a single click to place each vertex and a double click to finish the polygon.

Redraw point



- Navigate to the desired location using the [Mapping Tools](#).
- Select the Draw Point tool .
- 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  button, and expand the Coordinates section located under the map by clicking the  button.

- 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.
- Click **Update** to save the edited coordinates.

The screenshot shows the 'Edit Location' page in a Windows Internet Explorer browser. The page title is 'Kestrel: Edit Location [] - Windows Internet Explorer'. The URL is 'https://kestrel.natureserve.org/kestrel/Pages/Location/EditLocation.aspx'. The page features the 'Observations DMS' logo and the 'Canada' logo. A navigation menu on the left includes links for Home, My Profile, Surveys, Observations, Reports, People, Lists, Help, Technical Support, About Kestrel, and Contact Us. The main content area is titled 'Edit Location' and includes a sub-header 'Edit an existing location using the Map Edit Tools or the Manual Point Entry section'. A 'Map Layers' panel on the left lists 'Map Layers', 'Provinces', 'National Parks', 'Element Occurrences', '1:50,000', '1:250,000', and 'Contour'. A map of Canada is displayed with a scale of 1:7,994,825 and a 'Use Scale' of 1:1,000. The 'Coordinates' section has two radio buttons: 'Decimal Degrees' (selected) and 'UTM Coordinates'. The 'Decimal Degrees' section includes input fields for 'Latitude' (47.1792108) and 'Longitude' (-82.3866797). The 'UTM Coordinates' section includes input fields for 'Northing' (5225946.09297636), 'Easting' (398719.128399641), a 'Zone' dropdown menu (set to 17), and 'Hemisphere' radio buttons (N and S). A red circle highlights the 'Update' button. At the bottom left, there are 'OK' and 'Cancel' buttons. The 'Properties' and 'Task Results' sections are visible at the bottom of the page.


- 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.

The screenshot shows a web browser window titled "Kestrel: Edit Location [] - Windows Internet Explorer". The address bar contains the URL "https://kestrel.natureserve.org/kestrel/Pages/Location/EditLocation.aspx". The page header features the "Canada" logo on the left and "Observations DMS" in large yellow text on the right, with the "NatureServe" logo below it. A navigation menu on the left includes links for Home, My Profile, Surveys, Observations, Reports, People, Lists, Help, Technical Support, About Kestrel, and Contact Us. The main content area is titled "Edit Location" and includes a sub-header "Edit an existing location using the Map Edit Tools or the Manual Point Entry section".

The interface is divided into several sections:

- Map Layers:** A list of layers with checkboxes: Map Layers, Provinces, National Parks, Element Occurrences, 1:50,000, 1:250,000, and Contour.
- Map:** A map of a region in Canada with a green polygon highlighting a specific area. Below the map, the scale is set to "1:7,994,825" and "Use Scale" is set to "1:1,000".
- Coordinates:** A section with two radio buttons: Decimal Degrees and UTM Coordinates. It contains input fields for Latitude (47.1792108), Longitude (-82.3366797), Northing (5225946.09297636), and Easting (396719.128399641). There is also a dropdown for "Zone" (17) and radio buttons for "Hemisphere" (N and S).
- Buttons:** At the bottom left, "OK" and "Cancel" buttons are circled in red. At the bottom right of the coordinates section, there is an "Update" button.

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.



Kestrel: Edit Observation - Windows Internet Explorer

https://kestrel.natureserve.org/kestrel/Pages/Observation/ObsEdit.aspx

Canada Observations DMS NatureServe

Home Edit Observation Change Password Log Out jennifer nichols

My Profile
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Contact Us

Observation Information

Fields marked * require an entry.

Template: NatureServe Observation Standard
Survey: Parks Canada Test Survey

*Species Red-legged Frog

Rana aurora

*Observation Date 12/7/2007

*Location (45.6015166, -65.0972264) Map It

Enter Coordinates

*Primary Observer Weber, Whitney

Sensitive

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



Kestrel: Select a Person - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://kestrel.natureserve.org/kestrel/Pages/Person/SelectPerson.aspx

Canada Observations DMS NatureServe

Home Select a Person Log Out whitney

My Profile
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Contact Us

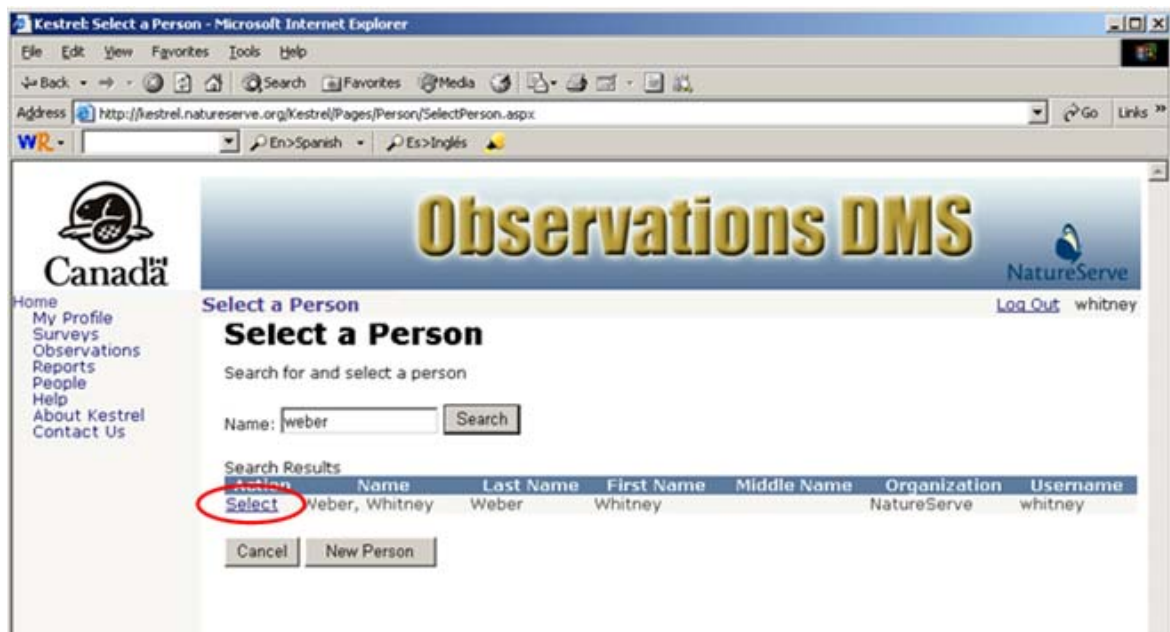
Select a Person

Search for and select a person

Name: weber Search

Cancel New Person

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.



The screenshot shows the 'Observations DMS' web application in Internet Explorer. The 'Survey' dropdown menu is open, showing 'test survey' and 'Parks Canada Test Survey'. The 'test survey' option is highlighted. Below the menu is a table of observations.

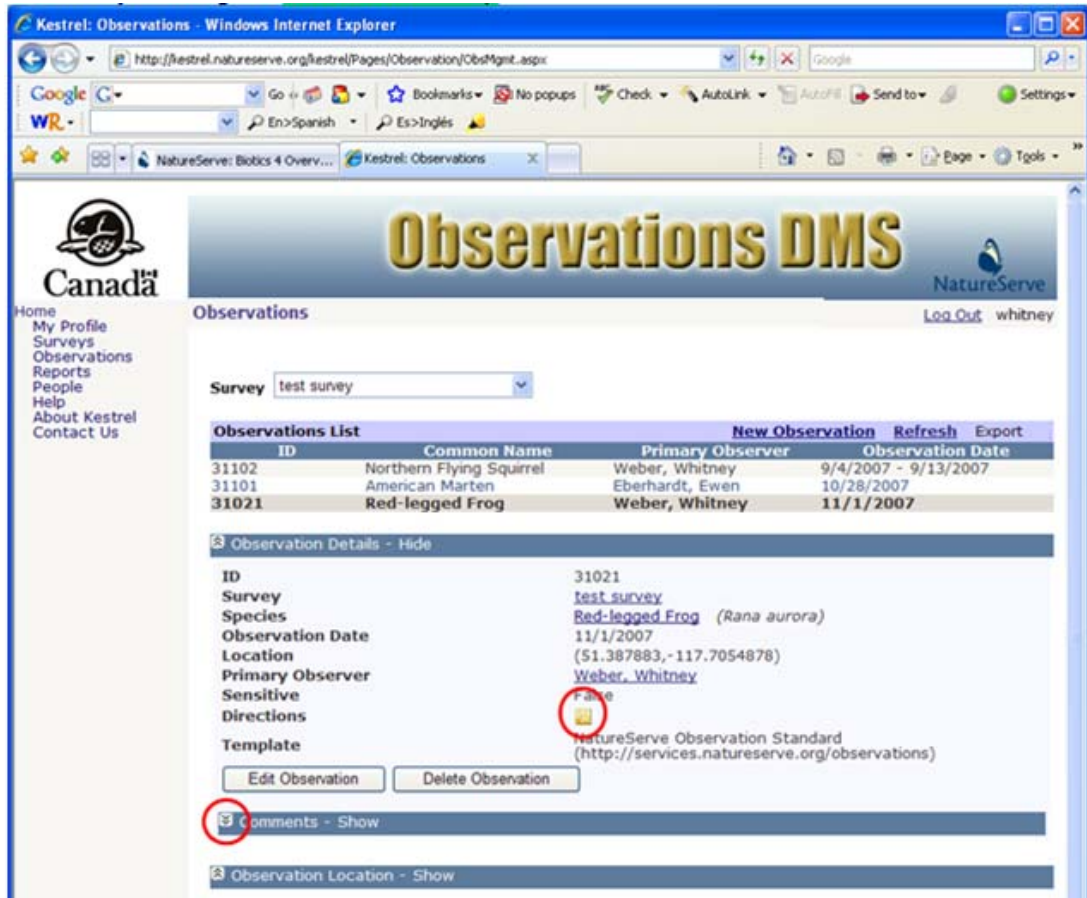
ID	Common Name	Primary Observer	Observation Date
31102	Northern Flying Squirrel	Weber, Whitney	9/4/2007 - 9/13/2007
31101	American Marten	Eberhardt, Ewen	10/28/2007
31021	Red-legged Frog	Weber, Whitney	11/1/2007

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

The screenshot shows the 'Observations DMS' web application in Microsoft Internet Explorer. The 'Survey' dropdown is set to 'test survey'. The 'Observations List' table is displayed, and the 'View' option is selected for the observation with ID 31021.


ID	Common Name	Primary Observer	Observation Date
31101	American Marten	Eberhardt, Ewen	10/28/2007
31021	Red-legged Frog	Weber, Whitney	11/1/2007


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





ID	Common Name	Primary Observer	Observation Date
31102	Northern Flying Squirrel	Weber, Whitney	9/4/2007 - 9/13/2007
31101	American Marten	Eberhardt, Ewen	10/28/2007
31021	Red-legged Frog	Weber, Whitney	11/1/2007

Observation Details - Hide

ID: 31021
Survey: [test survey](#)
Species: [Red-legged Frog](#) (*Rana aurora*)
Observation Date: 11/1/2007
Location: (51.387883, -117.7054878)
Primary Observer: [Weber, Whitney](#)
Sensitive: False
Directions: 
Template: NatureServe Observation Standard (<http://services.natureserve.org/observations>)

 [Comments - Show](#)

 [Observation Location - Show](#)

- To hide the Comments section, click the  icon.

Observations DMS

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Contact Us

Log Out whitney

Survey: test survey

ID	Common Name	Primary Observer	Observation Date
31102	Northern Flying Squirrel	Weber, Whitney	9/4/2007 - 9/13/2007
31101	American Marten	Eberhardt, Ewen	10/28/2007
31021	Red-legged Frog	Weber, Whitney	11/1/2007

Observation Details - Hide

ID: 31021
 Survey: [test survey](#)
 Species: [Red-legged Frog](#) (*Rana aurora*)
 Observation Date: 11/1/2007
 Location: (51.387883, -117.7054878)
 Primary Observer: [Weber, Whitney](#)
 Sensitive: False
 Directions:
 Template: NatureServe Observation Standard (<http://services.natureserve.org/observations>)

Comments - Hide

Directions

11/6/2007 4:34 PM Whitney Weber
 Enter any comments related to 'Directions'
 11/6/2007 4:34 PM Whitney Weber
 You can have multiple comments per field.

Observation Location - Show

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

The screenshot displays the 'Observations DMS' interface. At the top, there's a navigation menu with 'Home', 'My Profile', 'Surveys', 'Observations', 'Reports', 'People', 'Lists', 'Help', 'Technical Support', 'About Kestrel', and 'Contact Us'. The main content area shows a table of observations for the 'Parks Canada Test Survey'. The table has columns for ID, Common Name, Primary Observer, and Observation Date. The observation with ID 32750, 'Red-legged Frog', is highlighted. Below the table, there are buttons for 'New Observation', 'Refresh', and 'Export'. A map is shown below the table, displaying the location of the observation. The map includes a 'Map Layers' panel with options for 'Map Layers', 'Provinces', 'National Parks', 'Element Occurrences', '1:50,000', '1:250,000', and 'Contour'. The 'Observation Location - Hide' button is circled in red.

ID	Common Name	Primary Observer	Observation Date
32745	Cypridium planipetalum	Gravuer, Kelly	12/5/2007
32746	CARIBOU RAMS-HORN	Parent, Lynn	12/5/2007
32748	Eastern Massasauga Rattlesnake	Eberhardt, Ewen	12/5/2007
32749	Grizzly Bear	Eberhardt, Ewen	12/6/2007
32750	Red-legged Frog	Weber, Whitney	12/7/2007
32751	Red Fox	Rybock, Demian	12/7/2007
32752	NORTHERN TWO-LINED SALAMANDER	Parent, Lynn	12/7/2007
32754	Canada Lynx	Eberhardt, Ewen	12/11/2007
32756	American Beaver	sinclair, sedgwick	12/11/2007
32758	Gray Wolf	Bush, George	12/11/2007

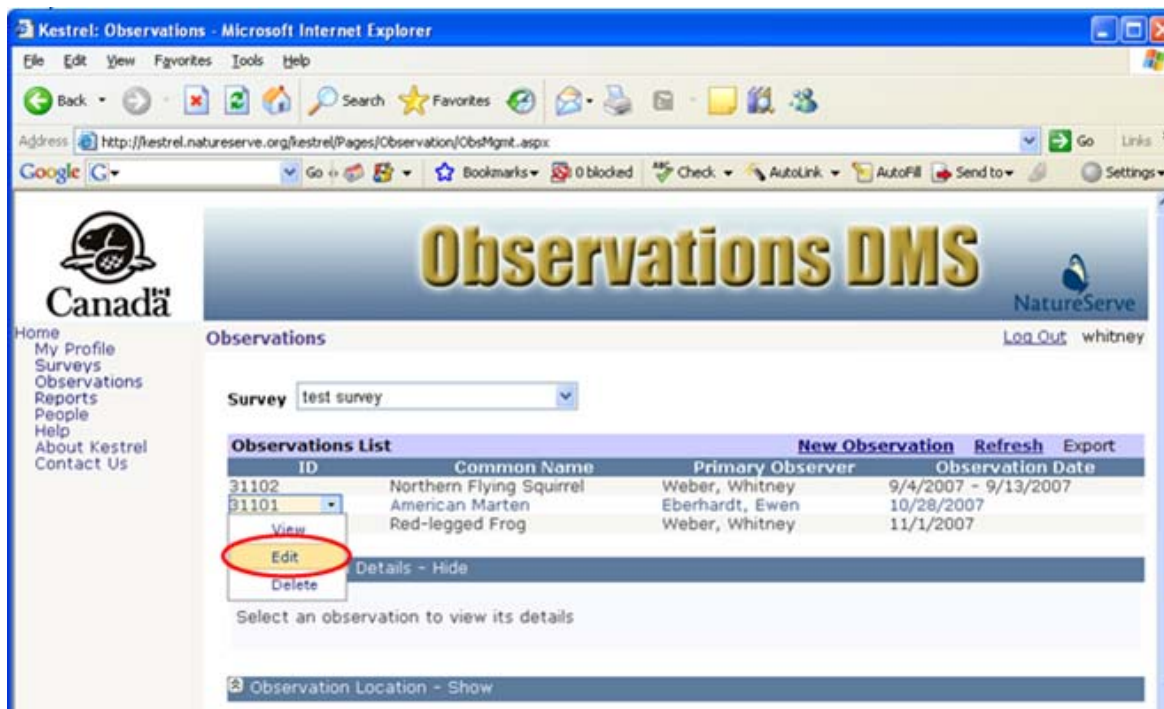
NOTE: See [Mapping Tools](#) for more information regarding using the tools associated with the mapping application.

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.

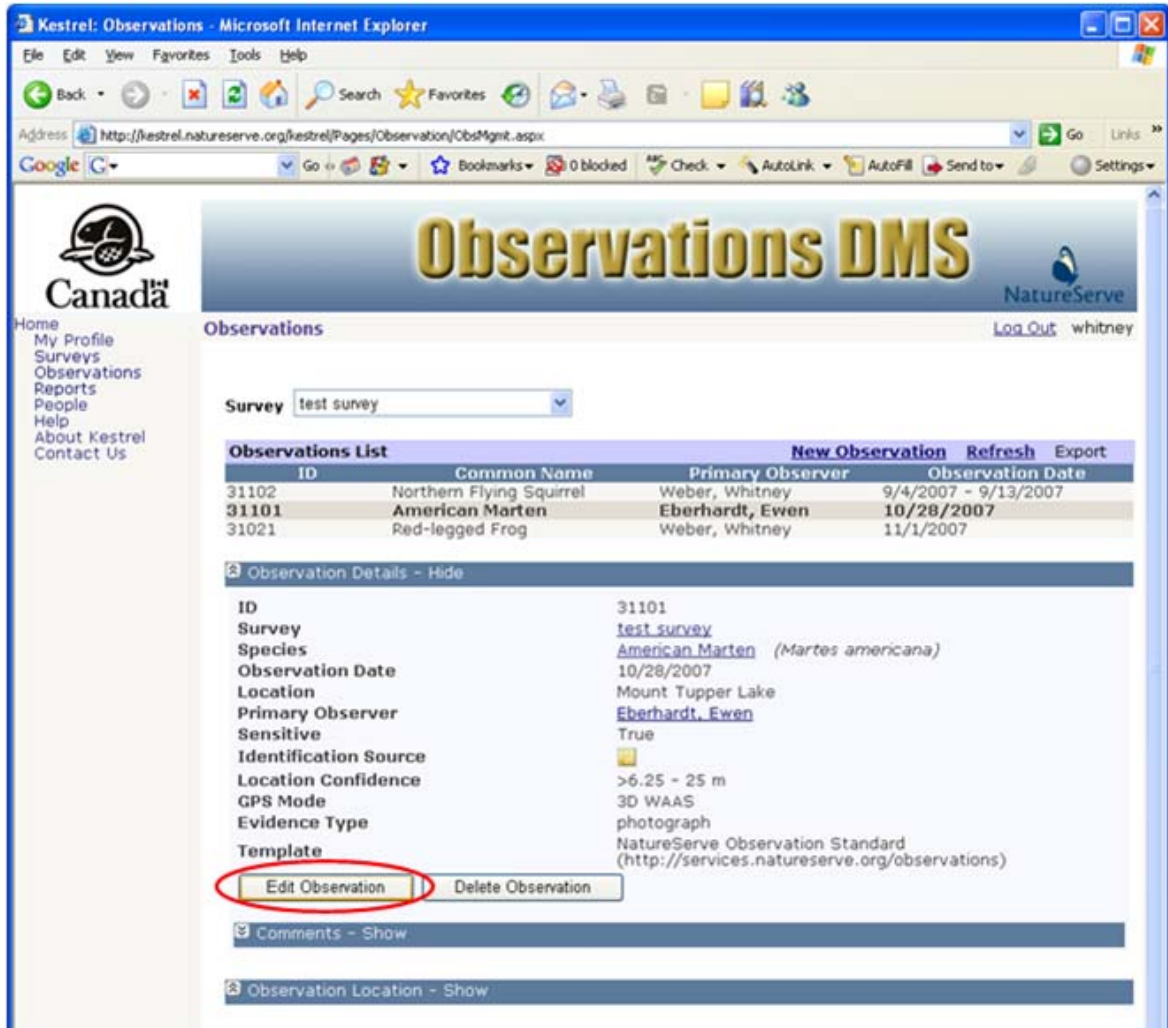


The screenshot shows the 'Observations DMS' web application. The page title is 'Observations DMS' and the user is logged out as 'whitney'. The page displays a 'Survey' dropdown menu set to 'test survey'. Below this is an 'Observations List' table with columns for ID, Common Name, Primary Observer, and Observation Date. The table contains three rows of data. A dropdown menu is open for the first row (ID 31102), showing options for 'View', 'Edit', and 'Delete'. The 'Edit' option is highlighted with a red circle. Below the table, there is a 'Details - Hide' link and a 'Select an observation to view its details' message. At the bottom, there is an 'Observation Location - Show' link.

ID	Common Name	Primary Observer	Observation Date
31102	Northern Flying Squirrel	Weber, Whitney	9/4/2007 - 9/13/2007
31101	American Marten	Eberhardt, Ewen	10/28/2007
	Red-legged Frog	Weber, Whitney	11/1/2007

- 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.

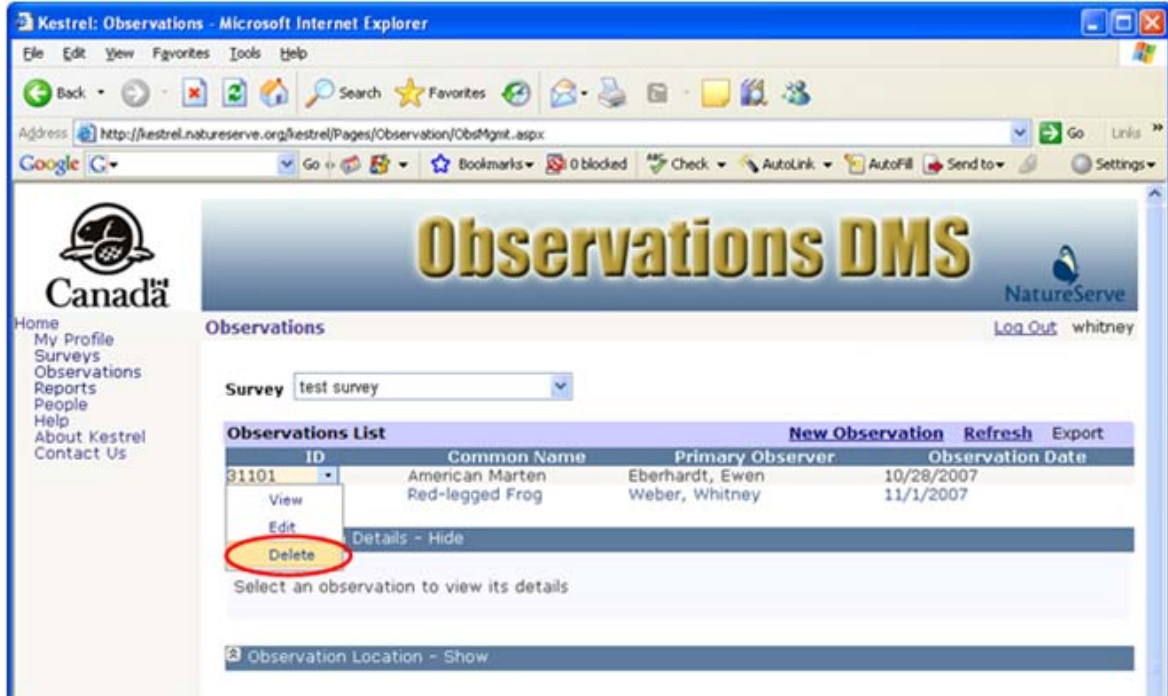
The screenshot shows a web browser window titled "Kestrel: Edit Observation - Windows Internet Explorer". The address bar shows the URL "https://kestrel.natureserve.org/kestrel/Pages/Observation/ObsEdit.aspx". The page header includes the "Canada" logo and "Observations DMS" in large yellow text, with the "NatureServe" logo to the right. Below the header, there is a navigation menu with links like "Home", "My Profile", "Surveys", "Observations", "Reports", "People", "Lists", "Help", "Technical Support", "About Kestrel", and "Contact Us". The main content area is titled "Edit Observation" and "Observation Information". It displays a message: "The observation was saved." and "Fields marked * require an entry." Below this, the form shows the following fields: "Template: NatureServe Observation Standard", "Survey: Parks Canada Test Survey", "Species: American Marten" (with a dropdown menu and a "Martes americana" label below it), "Observation Date: 10/28/2007" (with a calendar icon), "Location: Mount Tupper Lake" (with a "Map It" button and an "Enter Coordinates" input field), and "Primary Observer: Eberhardt, Ewen" (with a dropdown menu). There is also a "Sensitive" checkbox which is checked. At the bottom of the form, there are four buttons: "Save & Close" (circled in red), "Save", "Save & Copy", and "Cancel".

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.

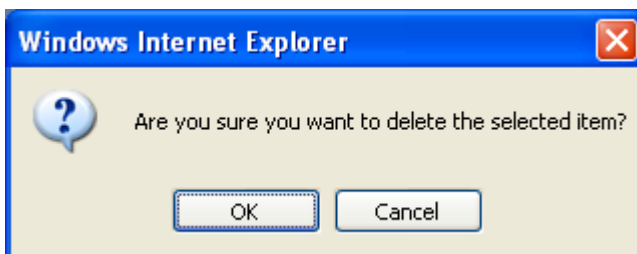


- OR -

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

The screenshot shows the 'Observations DMS' web application. The browser title is 'Kestrel: Observations - Microsoft Internet Explorer'. The address bar shows the URL: <http://kestrel.natureserve.org/kestrel/Pages/Observation/ObsMgmt.aspx>. The page features the Canada logo and the NatureServe logo. A navigation menu on the left includes links for Home, My Profile, Surveys, Observations, Reports, People, Help, About Kestrel, and Contact Us. The main content area is titled 'Observations' and includes a 'Survey' dropdown menu set to 'test survey'. Below this is an 'Observations List' table with columns for ID, Common Name, Primary Observer, and Observation Date. The table contains two rows: one for ID 31101 (American Marten) and one for ID 31021 (Red-legged Frog). Below the table is an 'Observation Details' section for ID 31101, showing fields for Survey, Species, Observation Date, Location, Primary Observer, Sensitive, Identification Source, Location Confidence, GPS Mode, Evidence Type, and Template. At the bottom of the details section are two buttons: 'Edit Observation' and 'Delete Observation', with the latter circled in red.

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

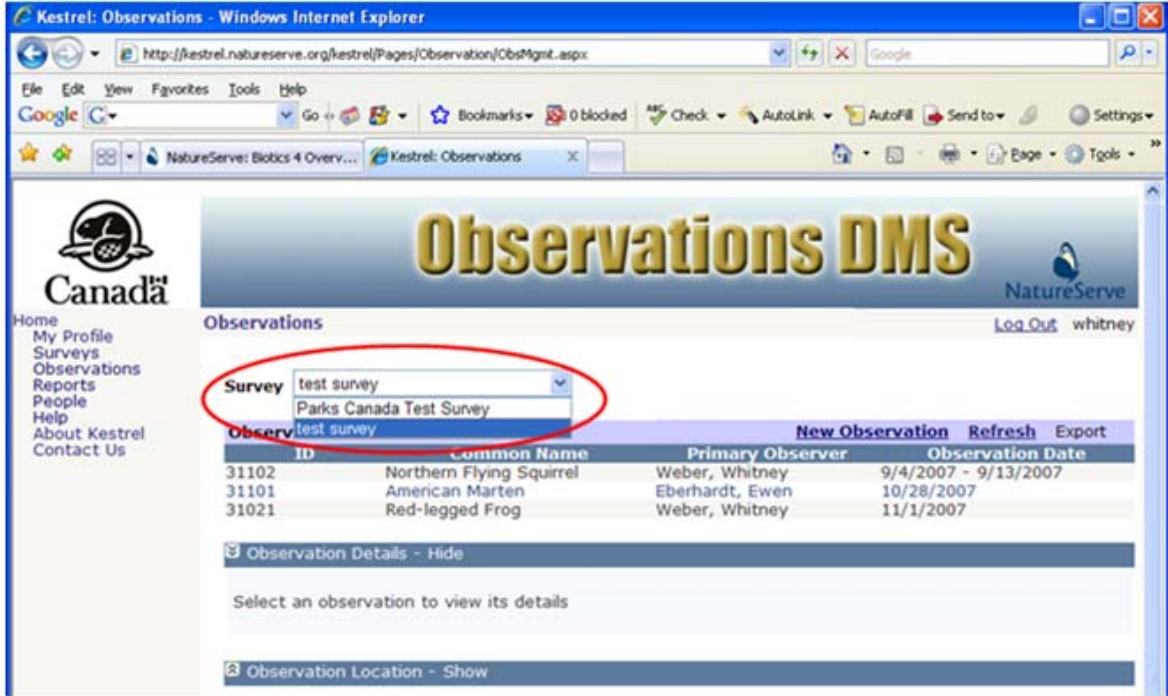


Related Tasks:

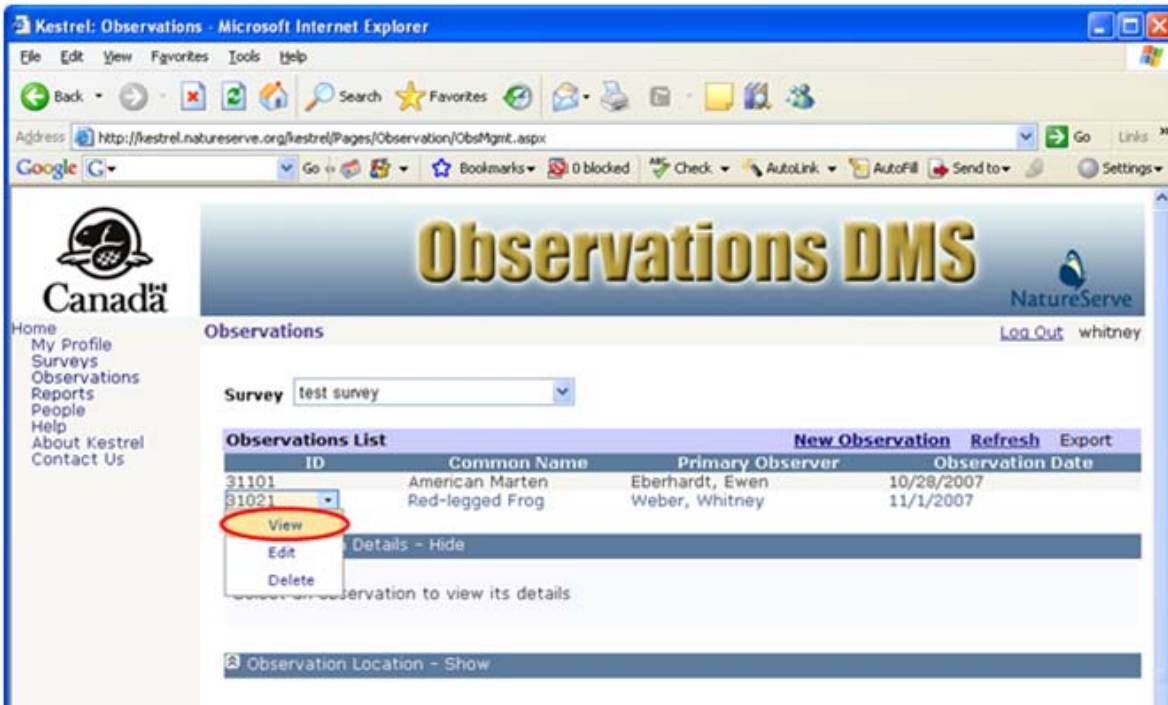
- [Create New Observation](#)
- [Edit Observation](#)

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.

The screenshot shows the 'Observations DMS' interface in Microsoft Internet Explorer. The browser address bar shows the URL: <http://kestrel.natureserve.org/Kestrel/Pages/Observation/ObsMgmt.aspx>. The page title is 'Observations DMS'. The left sidebar contains navigation links: Home, My Profile, Surveys, Observations, Reports, People, Help, About Kestrel, and Contact Us. The main content area is titled 'Observations' and includes a 'Survey' dropdown menu set to 'test survey'. Below this is an 'Observations List' table with columns for ID, Common Name, Primary Observer, and Observation Date. The table contains one row: ID 31000, Common Name Boreal Toad, Primary Observer Weber, Whitney, and Observation Date 10/25/2007. Below the table is an 'Observation Details - Hide' section with the following information: ID 31000, Survey [test survey](#) (circled in red), Species [Boreal Toad](#) (*Bufo boreas boreas*), Observation Date 10/25/2007, Location (51.3960156, -117.5637458), Primary Observer [Weber, Whitney](#), Sensitive False, and Template NatureServe Observation Standard (<http://services.natureserve.org/observations>). At the bottom of the details section are 'Edit Observation' and 'Delete Observation' buttons.

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](#).

The screenshot shows the 'Survey Details' page in Microsoft Internet Explorer. The browser address bar shows the URL: <http://kestrel.natureserve.org/Kestrel/Pages/Survey/SurveyDetails.aspx>. The page title is 'Observations DMS'. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Survey Details' and shows the following information: Survey Name test survey, Survey Owner [Weber, Whitney](#), and Observation Template NatureServe Observation Standard (<http://services.natureserve.org/observations>). Below this information are 'Edit Survey' and 'Delete Survey' buttons, which are circled in red. At the bottom of the page is a 'Close' button.

Related Tasks:

- [Edit Survey](#)
- [Delete Survey](#)

Edit Survey

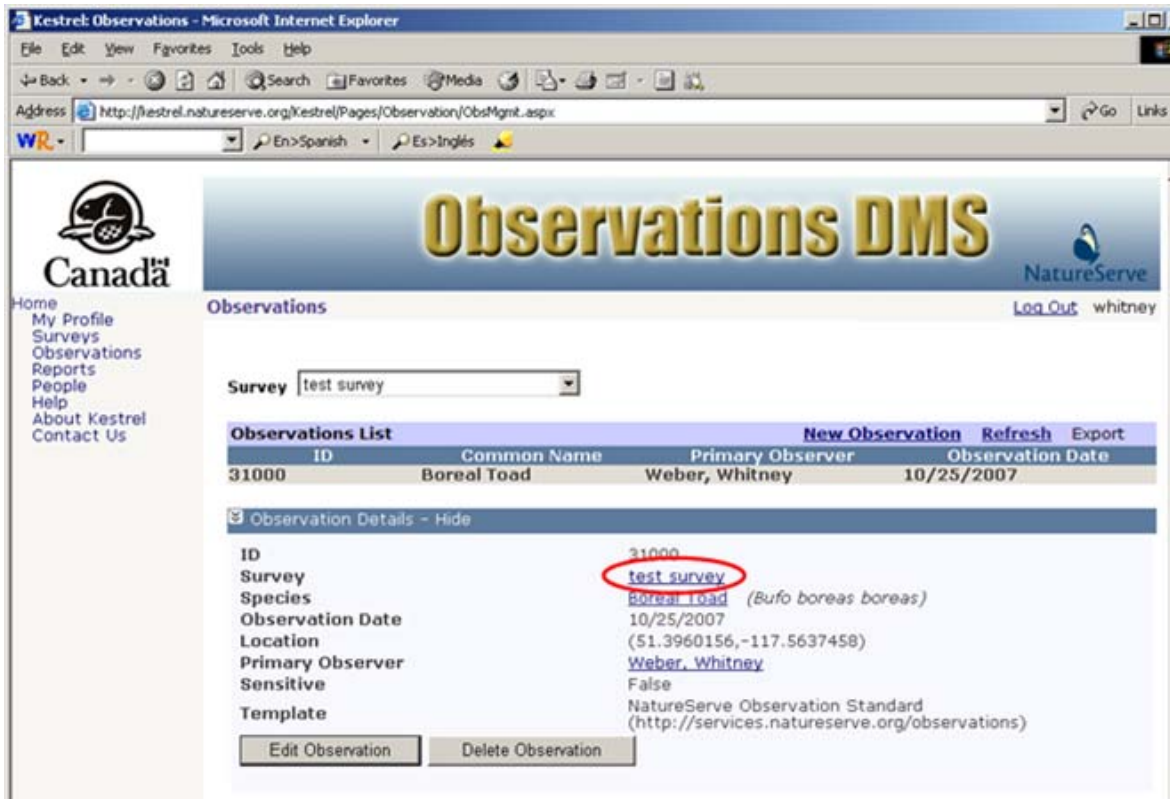
1. Within the *Observations* page, from the **Survey** dropdown list, select the survey containing the observations of interest.

Observations DMS

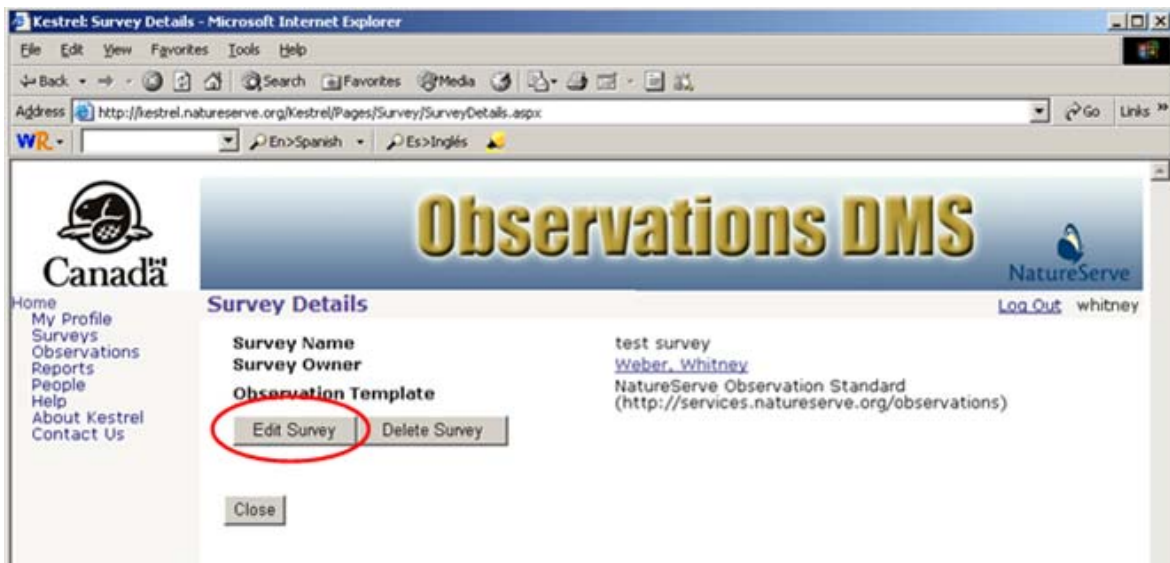
Survey: test survey (dropdown menu showing Parks Canada Test Survey)

ID	Common Name	Primary Observer	Observation Date
31102	Northern Flying Squirrel	Weber, Whitney	9/4/2007 - 9/13/2007
31101	American Marten	Eberhardt, Ewen	10/28/2007
31021	Red-legged Frog	Weber, Whitney	11/1/2007

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](#)

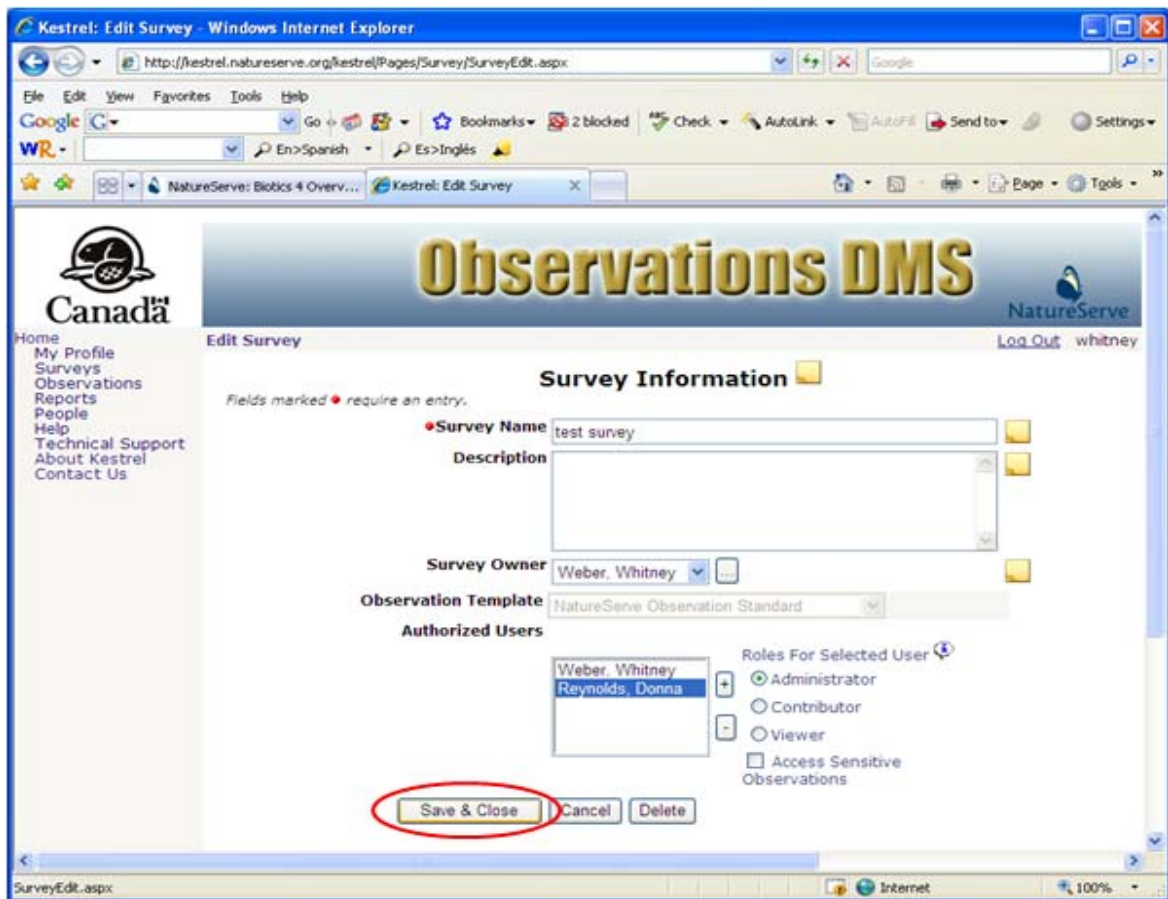
- [Survey Owner](#)
- [Observation Template](#)
- [Authorized Users](#)
- [Roles for Selected User](#)
- [Access Sensitive Observations](#)

The screenshot shows a web browser window titled "Kestrel Edit Survey - Microsoft Internet Explorer". The address bar displays "http://kestrel.natureserve.org/Kestrel/Pages/Survey/SurveyEdit.aspx". The page features the "Observations DMS" header with the Canada and NatureServe logos. A navigation menu on the left includes links for Home, My Profile, Surveys, Observations, Reports, People, Help, About Kestrel, and Contact Us. The main content area is titled "Edit Survey" and "Survey Information". A note states "Fields marked with a red dot require an entry." The form includes the following fields:

- Survey Name:** A text input field containing "test survey".
- Description:** A large text area.
- Survey Owner:** A dropdown menu showing "Weber, Whitney".
- Observation Template:** A dropdown menu showing "NatureServe Observation Standard".
- Authorized Users:** A list box containing "Reynolds, Donna" and "Weber, Whitney".
- Roles For Selected User:** Radio buttons for "Administrator" (selected), "Contributor", and "Viewer".
- Access Sensitive Observations:** An unchecked checkbox.

At the bottom of the form are three buttons: "Save Changes", "Cancel", and "Delete".

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

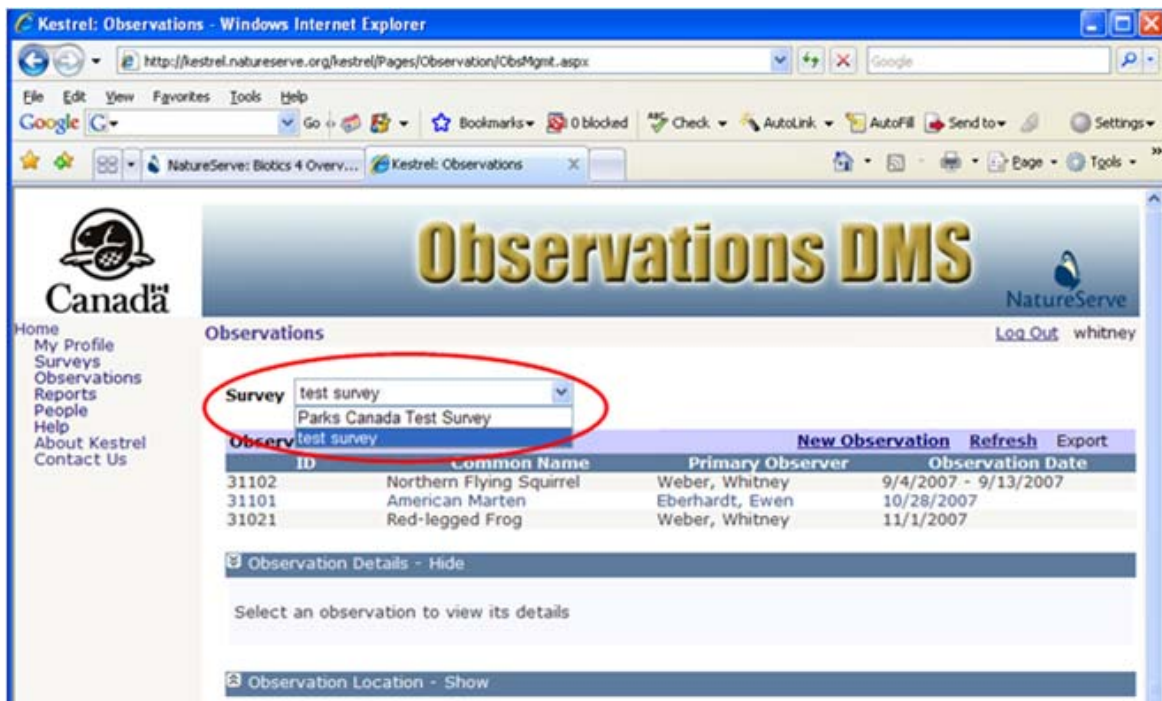


Related Tasks:

- [Select Survey Owner](#)
- [Add Authorized User](#)

Delete Survey

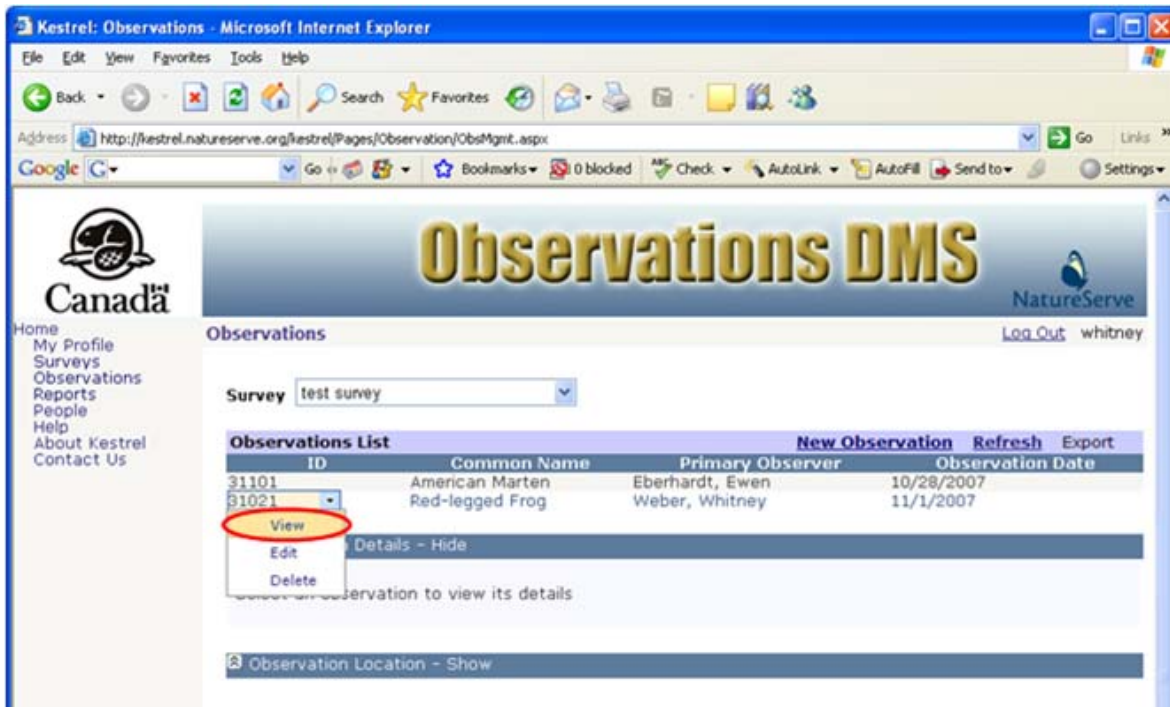
1. Within the *Observations* page, from the **Survey** dropdown list, select the survey containing the observations of interest.



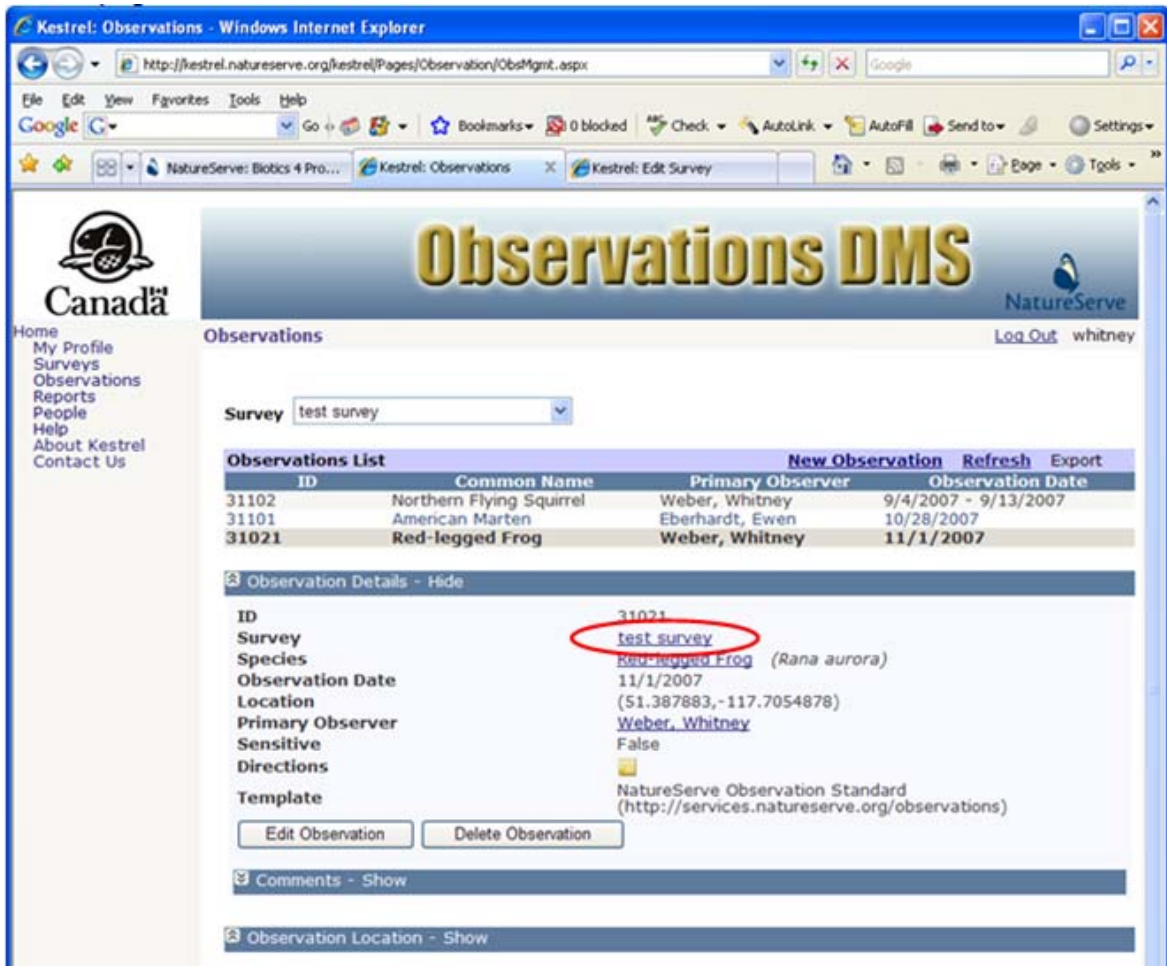
The screenshot shows the 'Observations DMS' web application interface. The browser window title is 'Kestrel: Observations - Windows Internet Explorer'. The URL is 'http://kestrel.natureserve.org/kestrel/Pages/Observation/ObsMgmt.aspx'. The page features the Canada logo on the left and the 'Observations DMS' title in large yellow letters at the top. Below the title, there is a navigation menu with options like Home, My Profile, Surveys, Observations, Reports, People, Help, About Kestrel, and Contact Us. The main content area is titled 'Observations' and includes a 'Survey' dropdown menu. The dropdown menu is open, showing three options: 'test survey', 'Parks Canada Test Survey', and 'test survey'. The first 'test survey' option is highlighted. Below the dropdown menu is a table of observations with columns for ID, Common Name, Primary Observer, and Observation Date. The table contains three rows of data. At the bottom of the page, there are two buttons: 'Observation Details - Hide' and 'Observation Location - Show'.

ID	Common Name	Primary Observer	Observation Date
31102	Northern Flying Squirrel	Weber, Whitney	9/4/2007 - 9/13/2007
31101	American Marten	Eberhardt, Ewen	10/28/2007
31021	Red-legged Frog	Weber, Whitney	11/1/2007

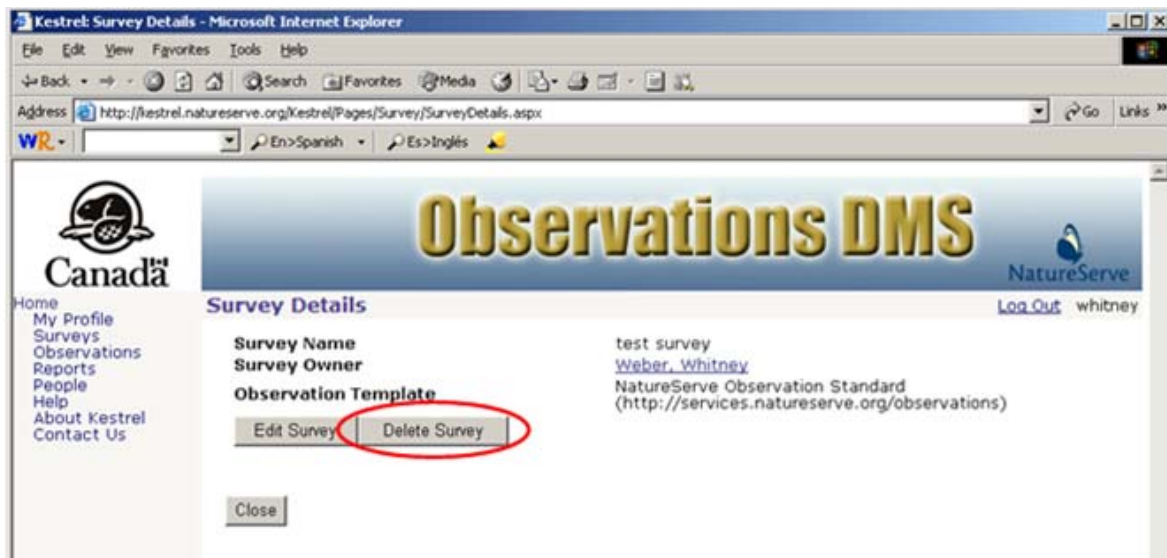
2. Within the *Observations* page, click on an observation record and from the dropdown list select to **View** the observation record.



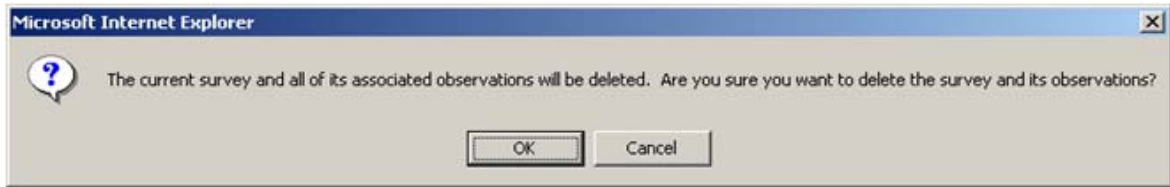
3. Within the Observation Details section, click on the survey link to navigate to the *Survey Details* page.



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



5. If a survey already contains observations, all observations 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 clicking **OK**.



View Person

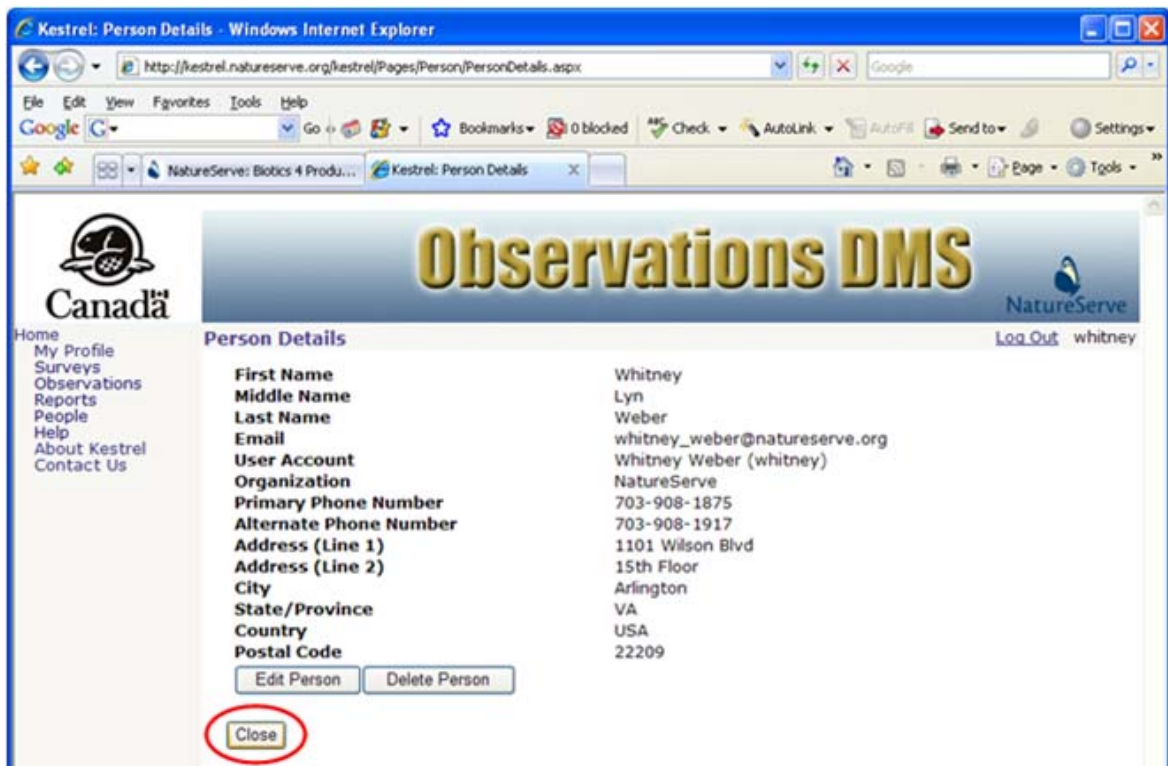
1. Within the *Observations* page, **View** an observation record.
2. Within the Observation Details section, click on the Primary Observer link to navigate to the *Person Details* page.

The screenshot shows the 'Observations DMS' interface in a Microsoft Internet Explorer browser. The page title is 'Kestrel: Observations - Microsoft Internet Explorer'. The address bar shows the URL: <http://kestrel.natureserve.org/Kestrel/Pages/Observation/ObsMgmt.aspx>. The page features the Canada logo on the left and the NatureServe logo on the right. The main content area is titled 'Observations' and includes a 'Survey' dropdown menu set to 'test survey'. Below this is an 'Observations List' table with columns for ID, Common Name, Primary Observer, and Observation Date. A single record is shown with ID 31000, Common Name Boreal Toad, Primary Observer Weber, Whitney, and Observation Date 10/25/2007. Below the table is an 'Observation Details - Hide' section with the following information:

ID	31000
Survey	test survey
Species	Boreal Toad (<i>Bufo boreas boreas</i>)
Observation Date	10/25/2007
Location	(51.3960156, -117.5637458)
Primary Observer	Weber, Whitney
Sensitive	False
Template	NatureServe Observation Standard (http://services.natureserve.org/observations)

At the bottom of the details section are two buttons: 'Edit Observation' and 'Delete Observation'. The 'Primary Observer' link 'Weber, Whitney' is circled in red in the original image.

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.

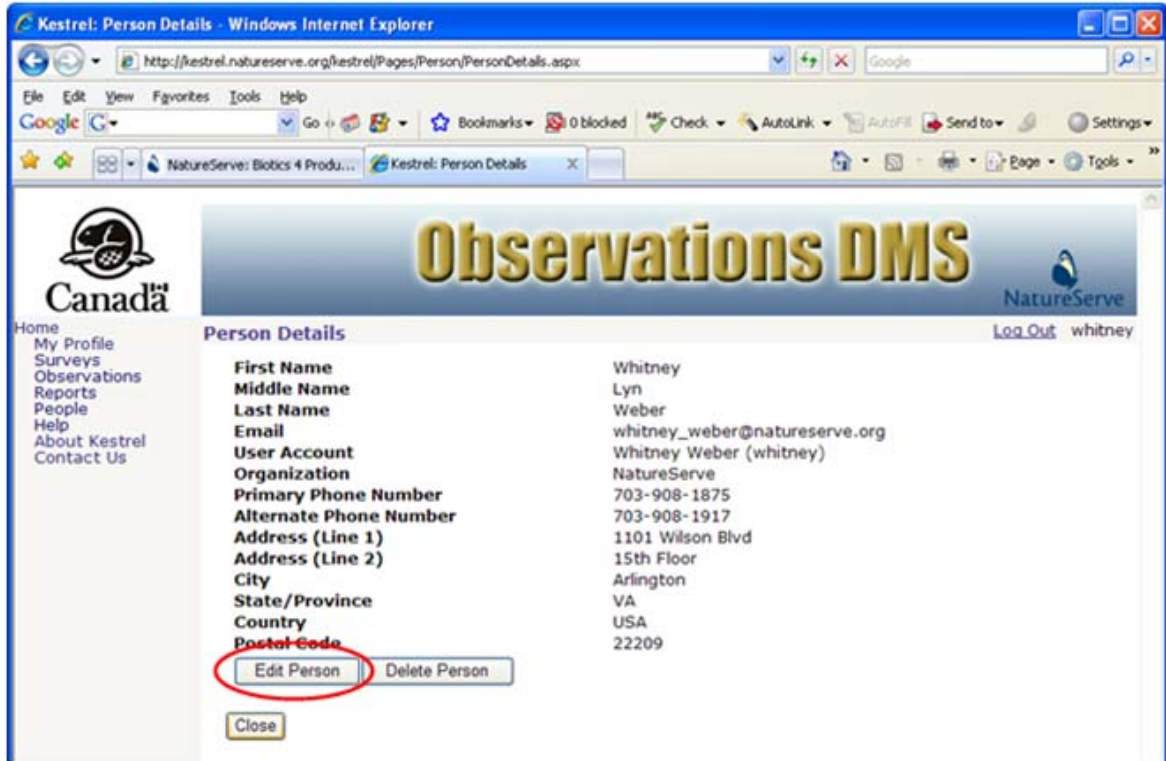
The screenshot shows the 'Observations DMS' web application. The browser title is 'Kestrel Observations - Microsoft Internet Explorer'. The address bar shows the URL: <http://kestrel.natureserve.org/Kestrel/Pages/Observation/ObsMgmt.aspx>. The page features the Canada logo on the left and the NatureServe logo on the right. The main content area is titled 'Observations' and includes a 'Survey' dropdown menu set to 'test survey'. Below this is an 'Observations List' table with columns for ID, Common Name, Primary Observer, and Observation Date. A single record is shown for ID 31000, Common Name Boreal Toad, Primary Observer Weber, Whitney, and Observation Date 10/25/2007. Below the table is an 'Observation Details' section with a 'Hide' button. The details include: ID (31000), Survey (test survey), Species (Boreal Toad (Bufo boreas boreas)), Observation Date (10/25/2007), Location (51.3960150, -117.5637458), Primary Observer (Weber, Whitney - circled in red), Sensitive (false), and Template (NatureServe Observation Standard). At the bottom of the details section are 'Edit Observation' and 'Delete Observation' buttons.

ID	Common Name	Primary Observer	Observation Date
31000	Boreal Toad	Weber, Whitney	10/25/2007

Observation Details - Hide

ID	31000
Survey	test survey
Species	Boreal Toad (Bufo boreas boreas)
Observation Date	10/25/2007
Location	(51.3960150, -117.5637458)
Primary Observer	Weber, Whitney
Sensitive	false
Template	NatureServe Observation Standard (http://services.natureserve.org/observations)

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.

Observations DMS

Canada NatureServe

Home
My Profile
Surveys
Observations
Reports
People
Help
Technical Support
About Kestrel
Contact Us

Log Out whitney

Person Information

Fields marked * require an entry.

*First Name	Whitney
Middle Name	Lyn
*Last Name	Weber
Email	whitney_weber@natureserve.org
User Account	Whitney Weber (whitney)
*Organization	NatureServe
Primary Phone Number	703-908-1875
Alternate Phone Number	703-908-1917
Address (Line 1)	1101 Wilson Blvd
Address (Line 2)	15th Floor
City	Arlington
State/Province	VA
Country	USA
Postal Code	22209

Save & Close Cancel Delete Edit User Account

Related Tasks:

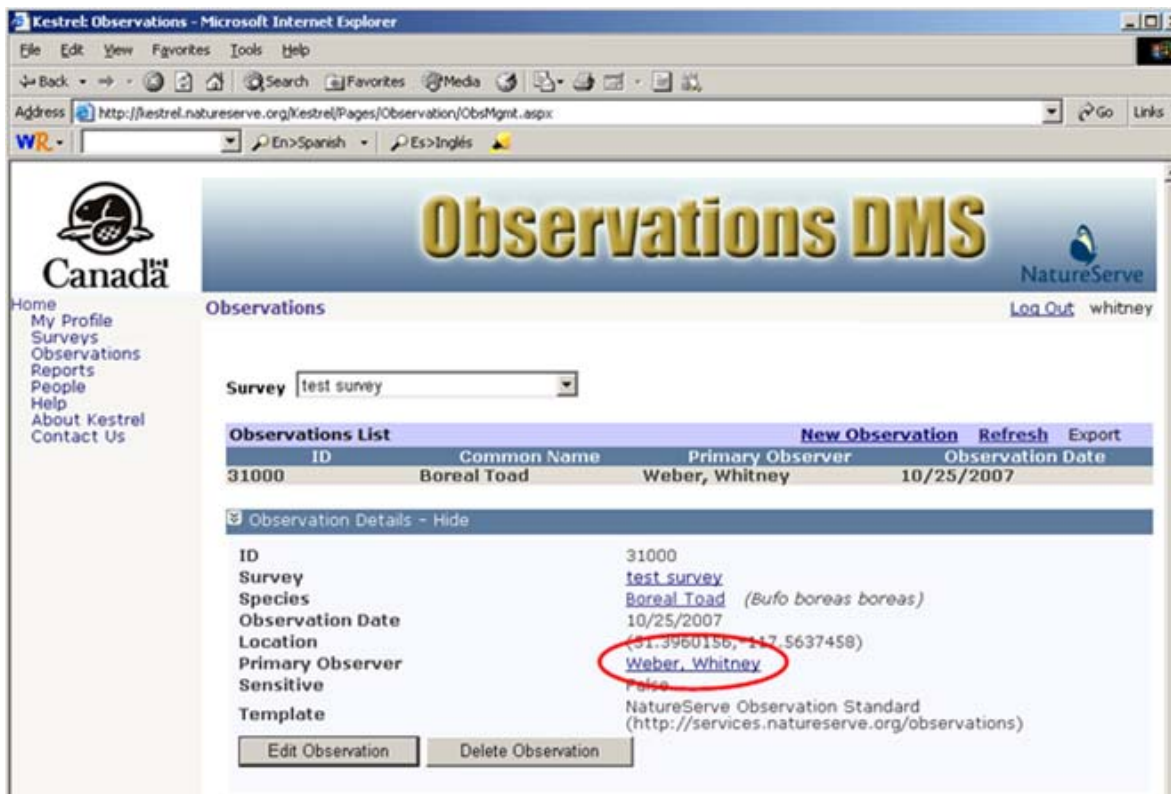
- [Edit User Account](#)
- [Delete Person](#)

Delete Person

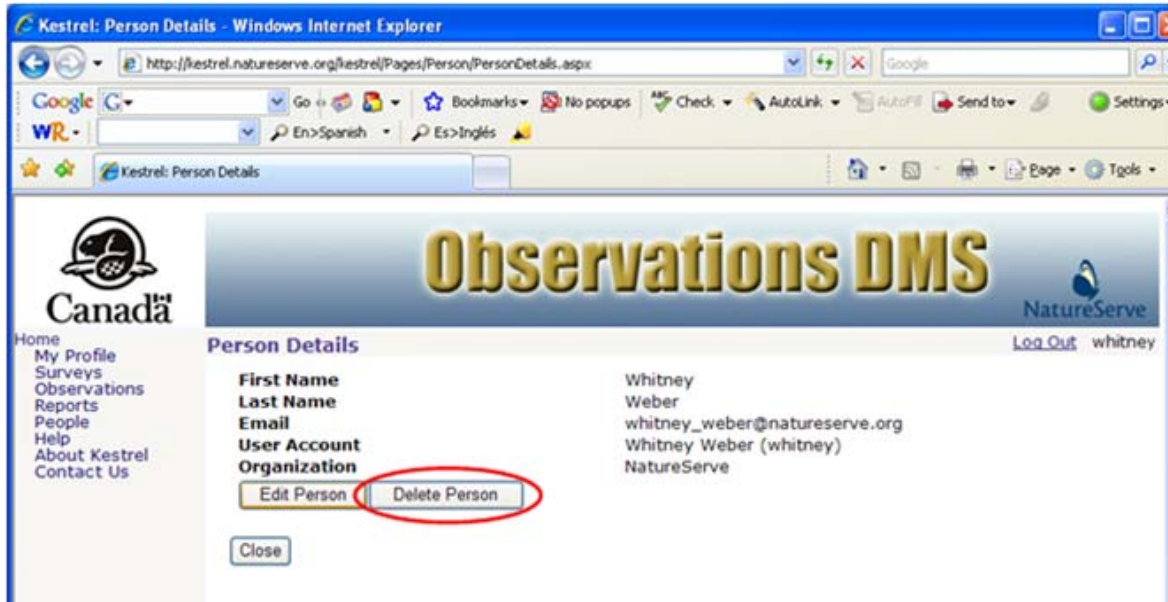
NOTE: A person record cannot be deleted if it is referenced as a Primary Observer within one or more observations or as a Survey Owner. Attempting to delete such a person record will result in the following message:



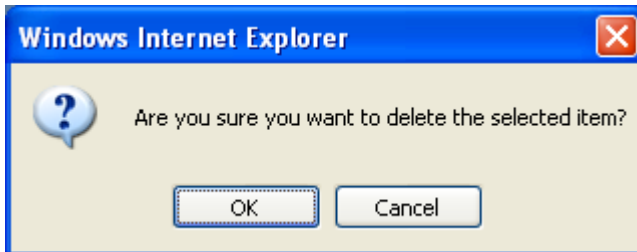
1. Within the *Observations* page, **View** an observation record.
2. Within the Observation Details section, click on the Primary Observer link to navigate to the *Person Details* page.



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.






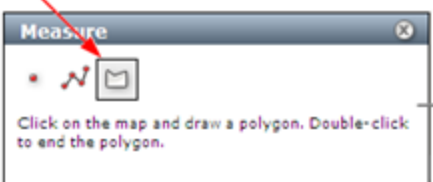
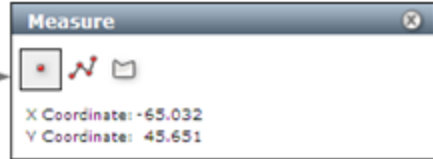

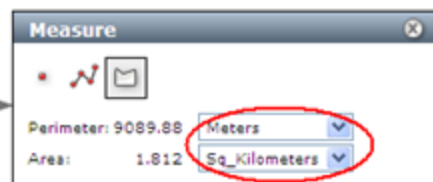
Related Tasks:

- [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

Use the Measure Tool
Click on the  button, choose whether the feature to be measured is a point, line, or polygon by selecting the appropriate button in the **Measure** box that is displayed.

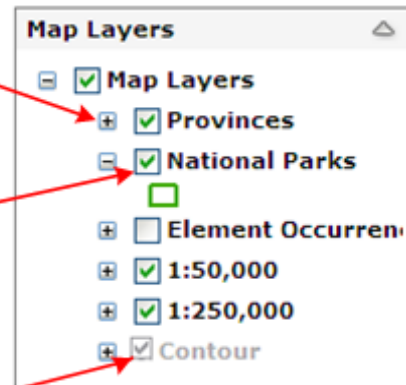
 Click on the map to return the coordinate location of the point.	 Click on the map and draw a line. Double-click to end the line.	 Click on the map and draw a polygon. Double-click to end the polygon.
		

Select Units for the Measurement
Once a line or polygon has been digitized and a value is displayed in the **Measure** box, use the appropriate dropdown list to choose the units for the measurement. Conversions of measurements to units other than the defaults are made automatically.

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.



The screenshot shows the Kestrel software interface with several panels and callouts:

- Map Layers Panel:** Contains a list of layers with checkboxes: Map Layers, Provinces, National Parks, Element Occurrence, 1:50,000, 1:250,000, and Contour.
- Tasks Panel:** Lists 'Select National Park', 'Select Province', and 'Query Builder'. These items are circled in red.
- Search Panel:** Includes a 'Name:' input field and 'Search' and 'New' buttons. The 'Search' button is circled in red.
- Coordinates Panel:** Features radio buttons for 'Decimal Degrees' (selected) and 'UTM Coordinates'. It has input fields for Latitude, Longitude, Northing, Easting, and Zone, along with a 'Hemisphere' section (N/S) and an 'Update' button.
- Properties Panel:** Includes a 'Name' input field and an 'Update' button.
- Task Results Panel:** A section for viewing task results.
- Map Area:** Displays a map of a region with various geographical features. A scale of 1:102,434,897 and a 'Use Scale: 1:1,000' dropdown are visible.

Instructional Callouts:

- Search for Named Location:** To edit 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.
- Save Changes:** Click **OK** to save the changes to the location or **CANCEL** to cancel the location creation or edition. (The **OK** and **Cancel** buttons are circled in red).

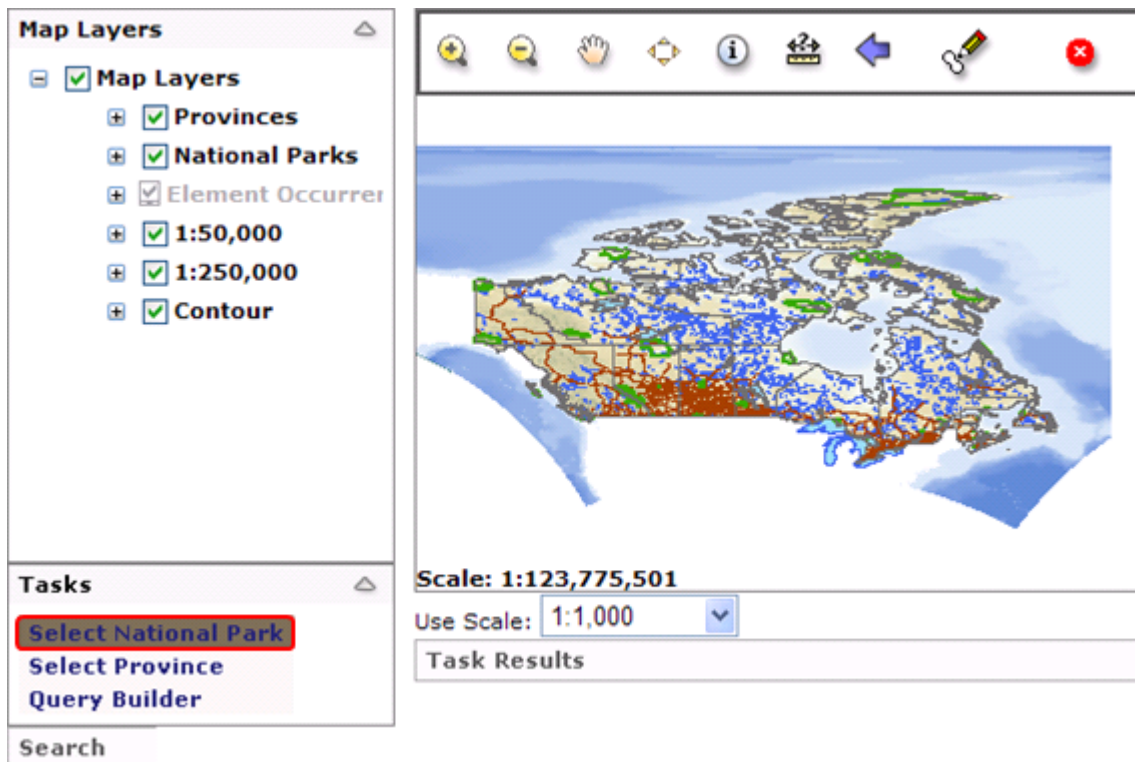
Related Tasks:

- [Create New Location](#)
- [Edit Location](#)
- [Select Tasks](#)
- [Use Query Builder](#)
- [Define Report Criteria according to Mapped Location](#)

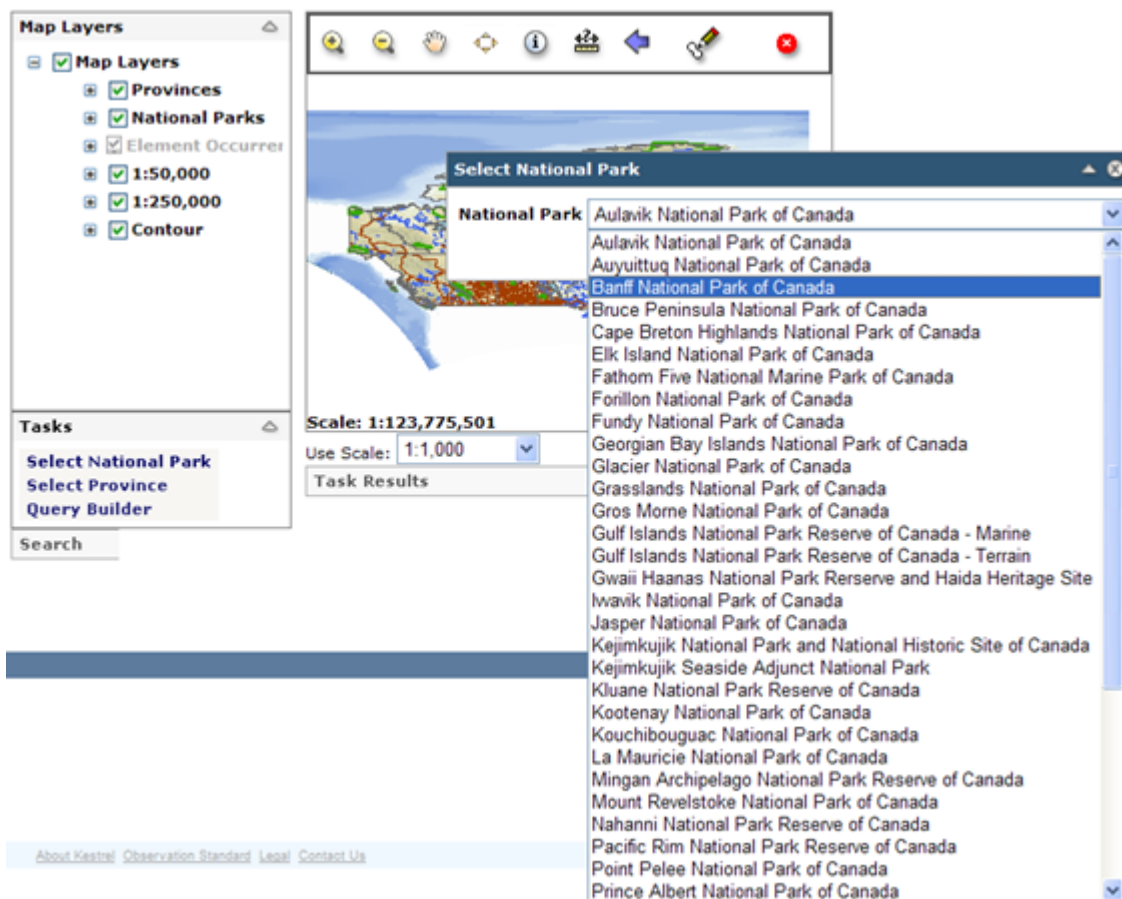
Select Tasks


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 – next to an expanded node to collapse it.

The screenshot displays the Kestrel software interface. On the left, the 'Map Layers' panel is expanded, showing a list of layers: 'Map Layers' (checked), 'Provinces' (checked), 'National Parks' (checked), 'Element Occurrence' (checked), '1:50,000' (checked), '1:250,000' (checked), and 'Contour' (checked). Below this is the 'Tasks' panel with options: 'Select National Park', 'Select Province', and 'Query Builder'. A 'Search' field is also visible.

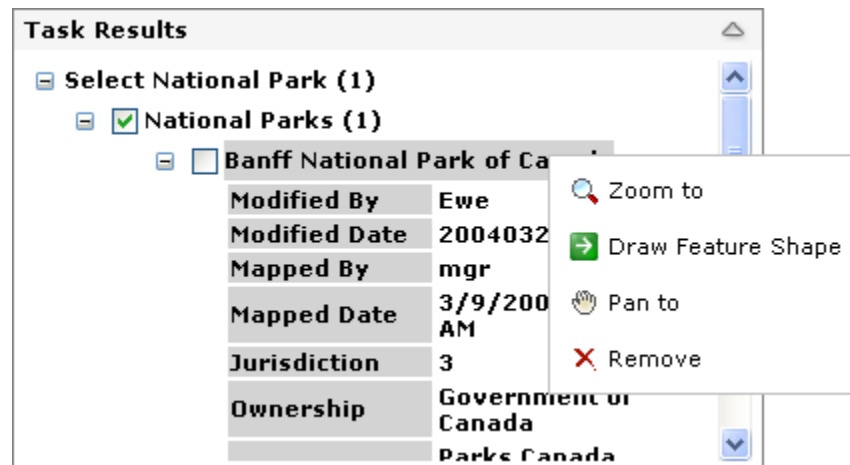
The main map area shows a map of Canada with various colored overlays. The scale is indicated as 'Scale: 1:123,775,501' and the 'Use Scale' dropdown is set to '1:1,000'. The map includes a toolbar with icons for zooming, panning, and other navigation functions.

The 'Task Results' panel is open, showing a list of results. The top entry is 'Select National Park (1)', which is expanded to show 'National Parks (1)'. Under this, 'Banff National Park of Canada' is listed with a red arrow pointing to its checkbox. To the right of the entry is a table of metadata:

Modified By	Ewe
Modified Date	20040323 10:15:35
Mapped By	mgr
Mapped Date	3/9/2004 12:00:00 AM
Jurisdiction	3
Ownership	Government of Canada
	Parks Canada

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 – 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

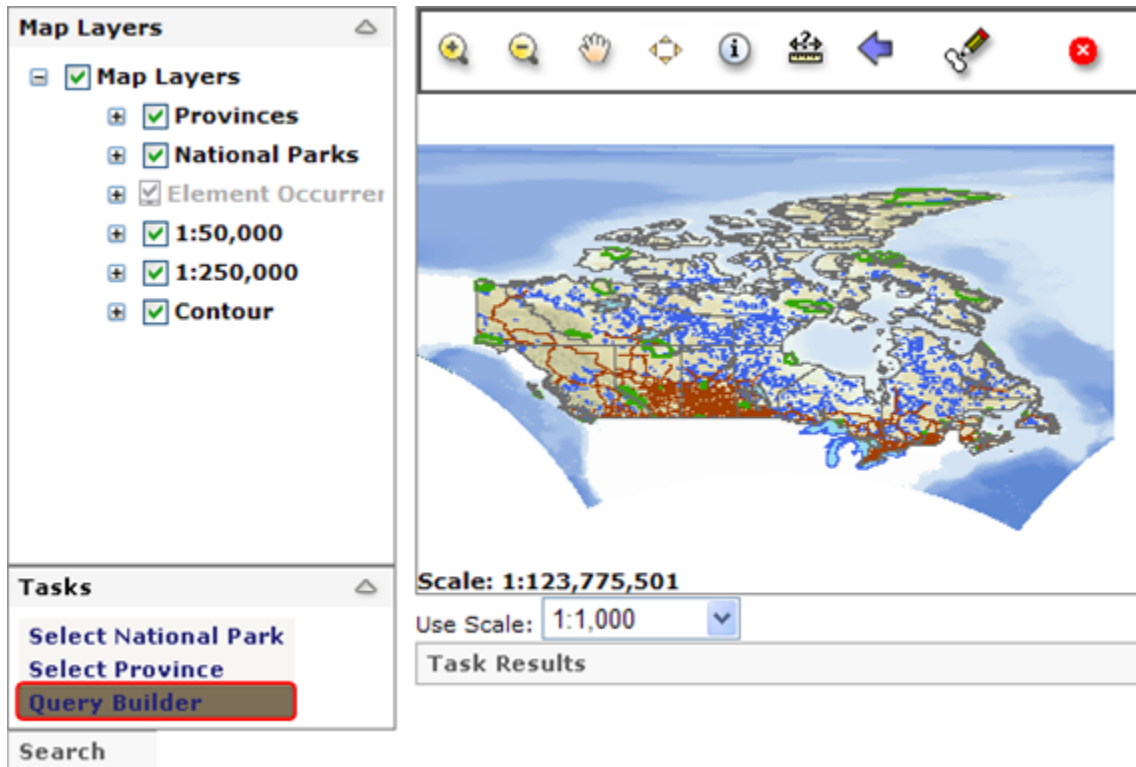
**Related Tasks:**

- [Define Report Criteria according to Mapped Location](#)

Query Builder Tool

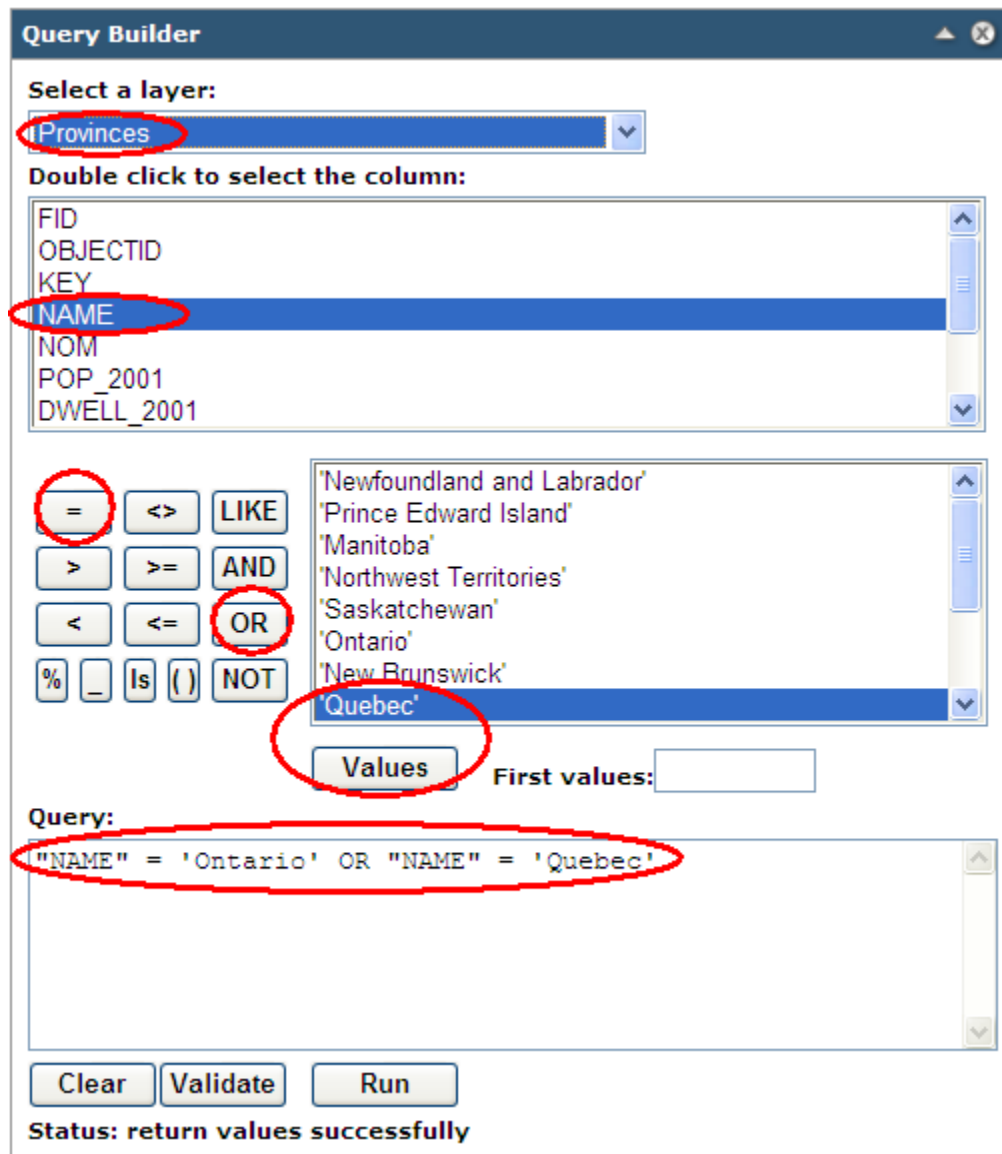
The Query Builder tool lets you select features in a layer by building a query. Below are the steps for using the tool. Note, however, that more specific details on how to develop queries (e.g., querying numbers, combining expressions, using nulls), are provided in the "Build a Query" topic.

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

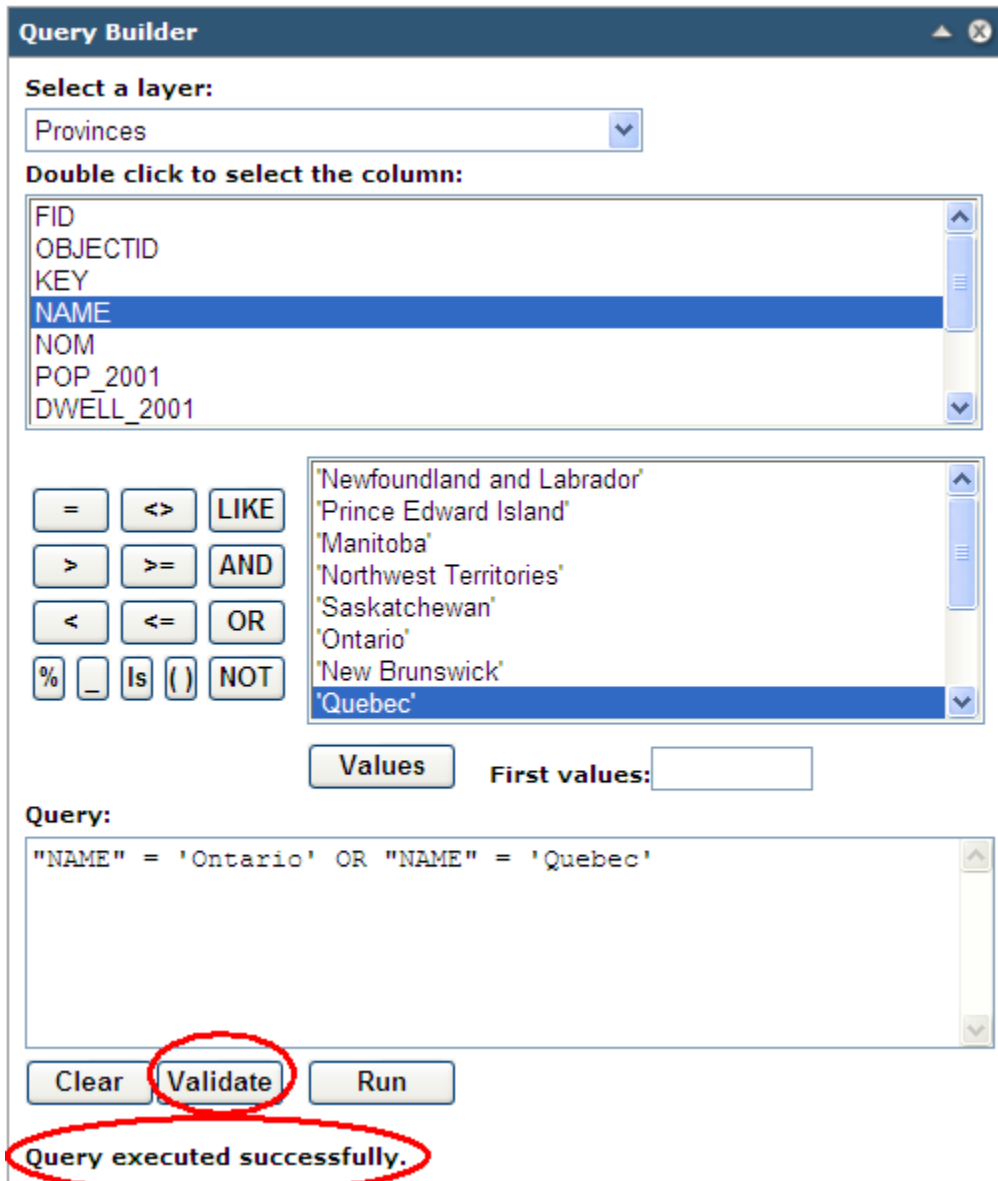


2. To create an expression using the *Query Builder* dialog:
 - Choose the layer to be used from the Select a Layer dropdown, which will cause the columns for that layer to be displayed.
 - Double-click the column you want to use in the query, and then click the **Values** button to display the domain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

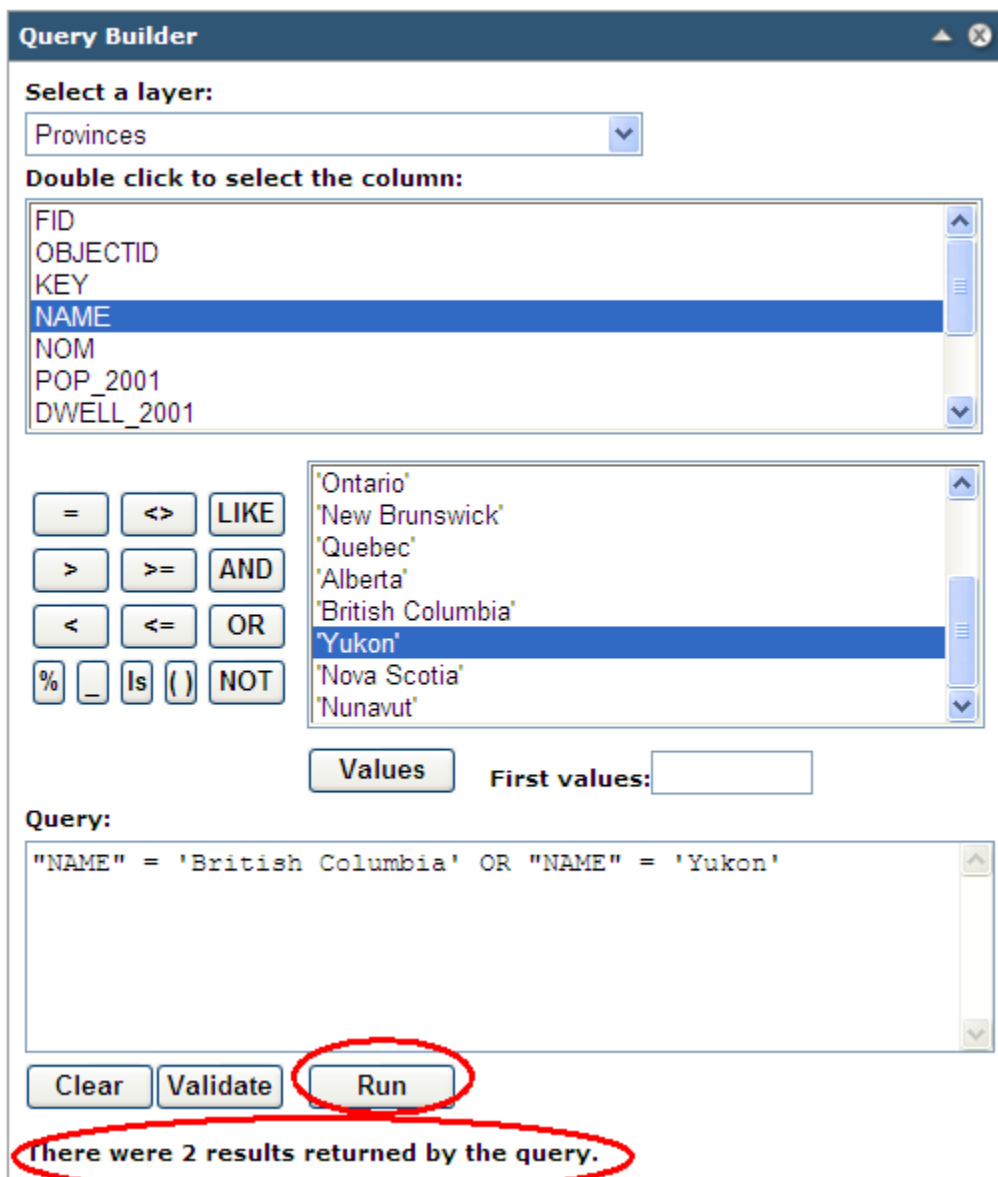





3. OPTIONAL: When the query expression has been built, click **Validate** to insure that the query is valid, that is, it will run without a problem. Once the validation process has completed, a message will be displayed in the lower left corner of the dialog indicating whether the query is valid.



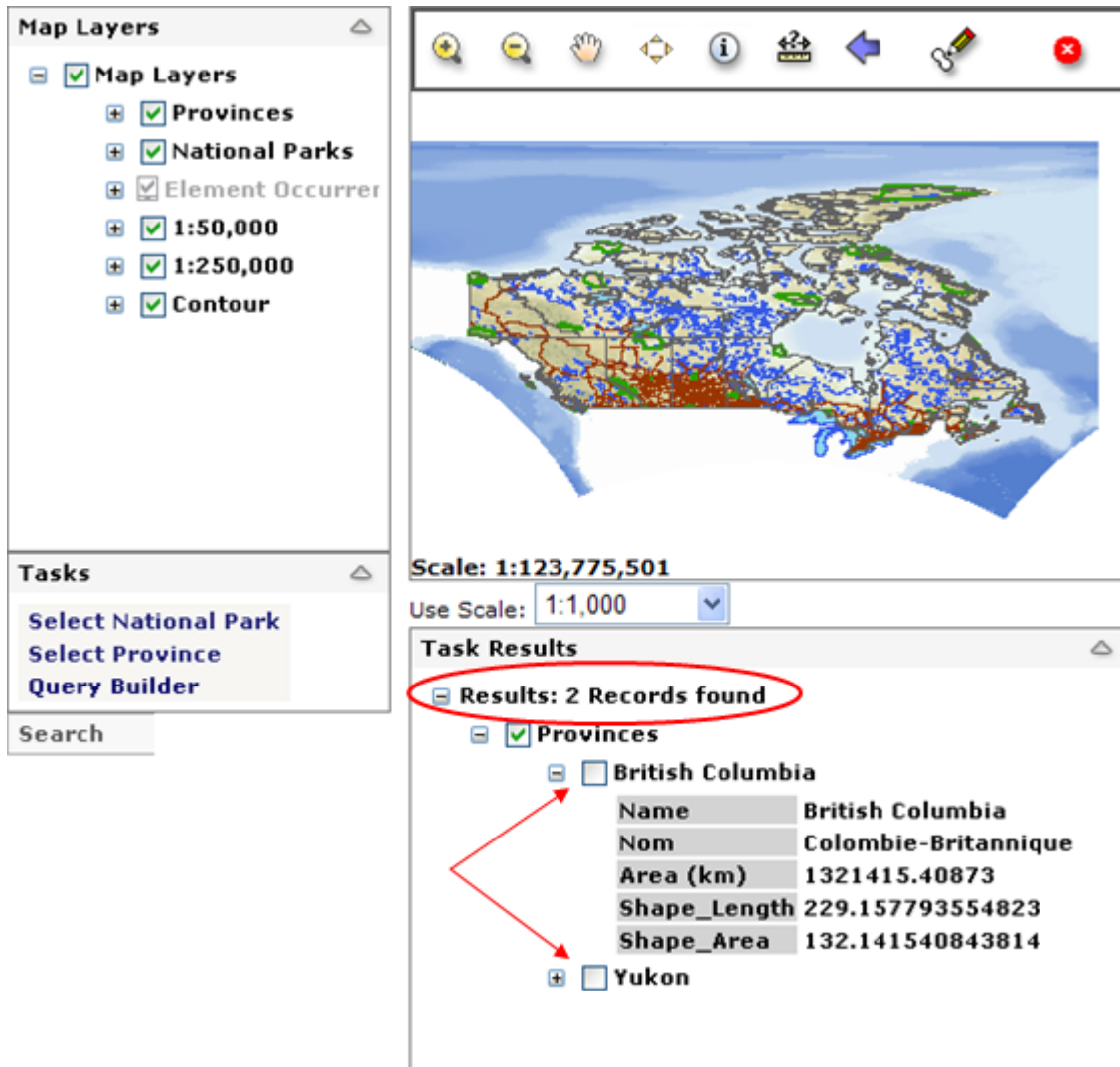
4. Once the query has been successfully validated (optional), click **Run** to generate results for the query.

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 – next to an expanded node to collapse it.

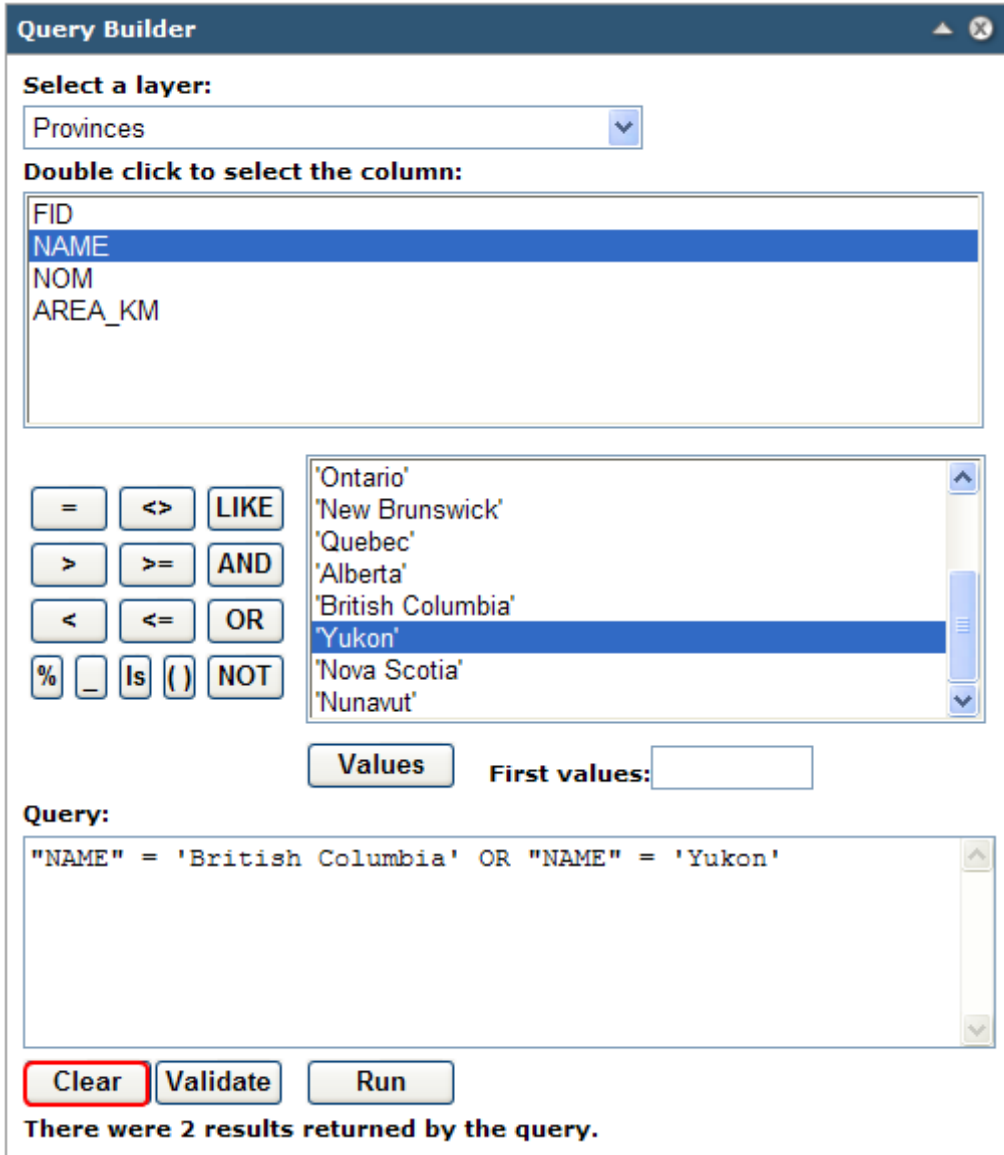
NOTE: In cases where multiple queries have been run and results not deleted following each query, the results of the most recent query are displayed at the top of the list in the Task Results section. The order of the results in the list reflects the sequence in which the queries were run, with the bottom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

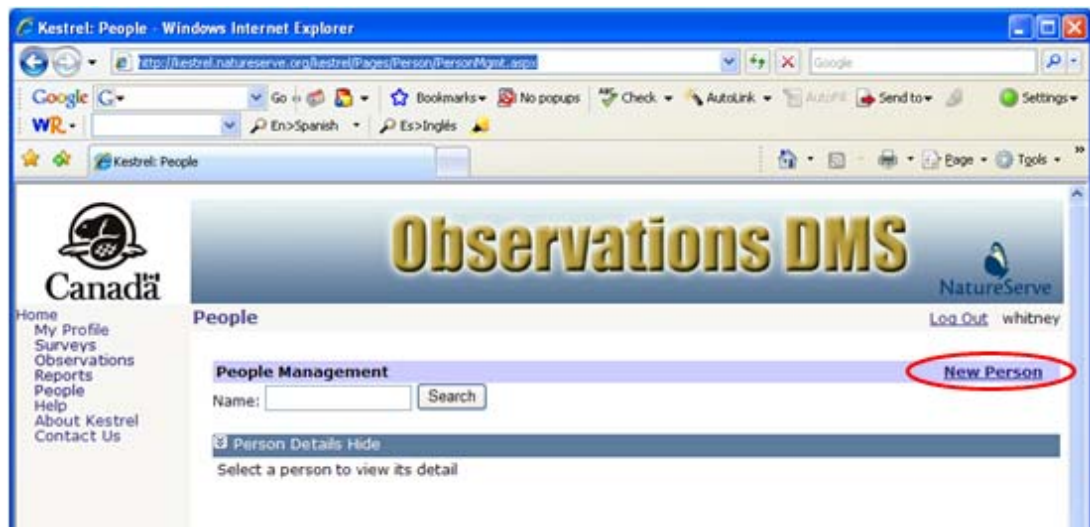
Tasks:

- [Find Person](#)
- [Create New Person](#)
- [View Person](#)
- [Edit Person](#)
- [Delete Person](#)
- [Create User Account](#)
- [Edit User Account](#)
- [Delete User Account](#)

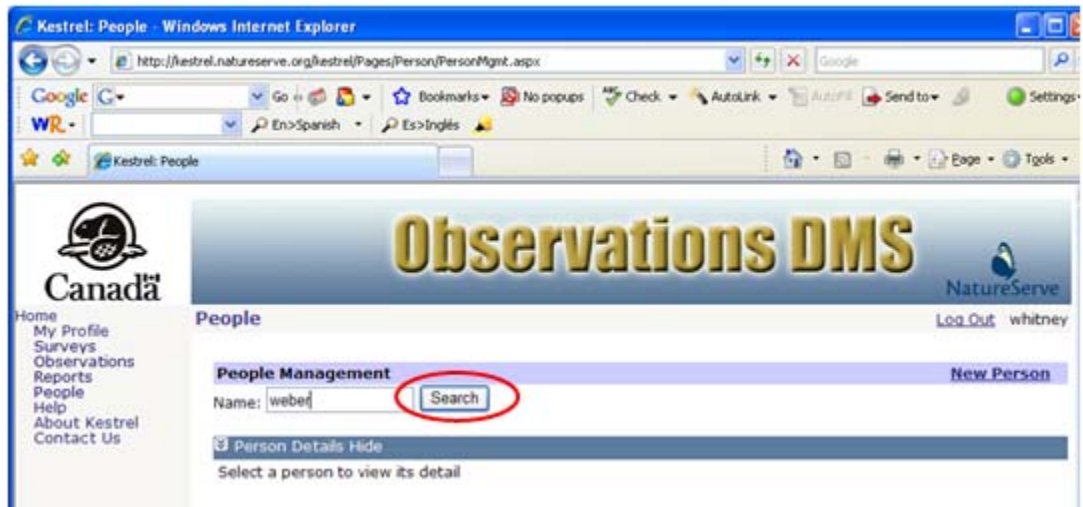
Methods of Navigation:

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

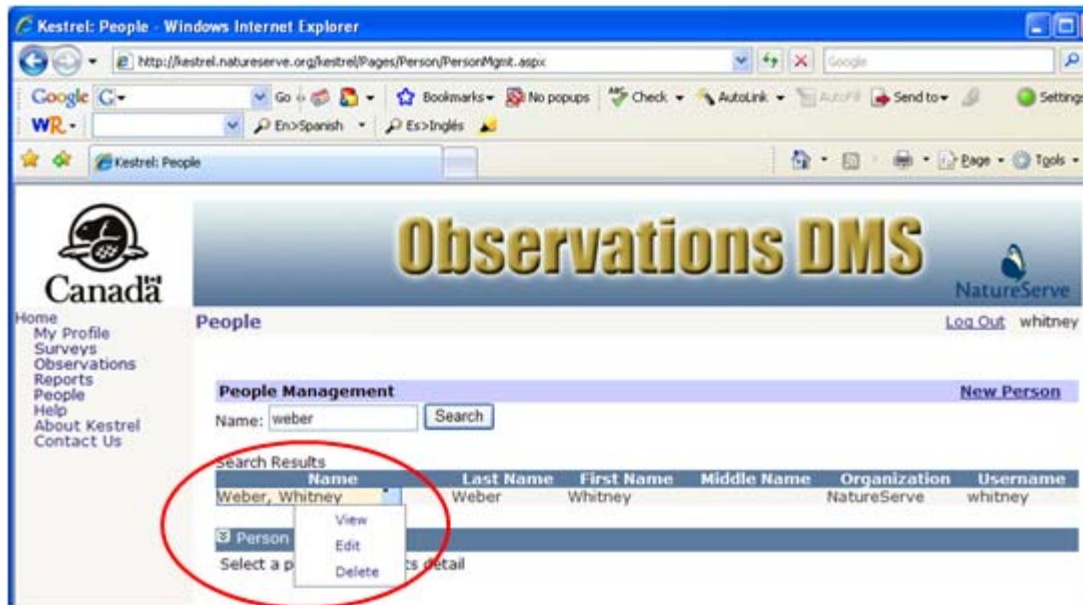
- Create a new person by clicking on the **New Person** button.



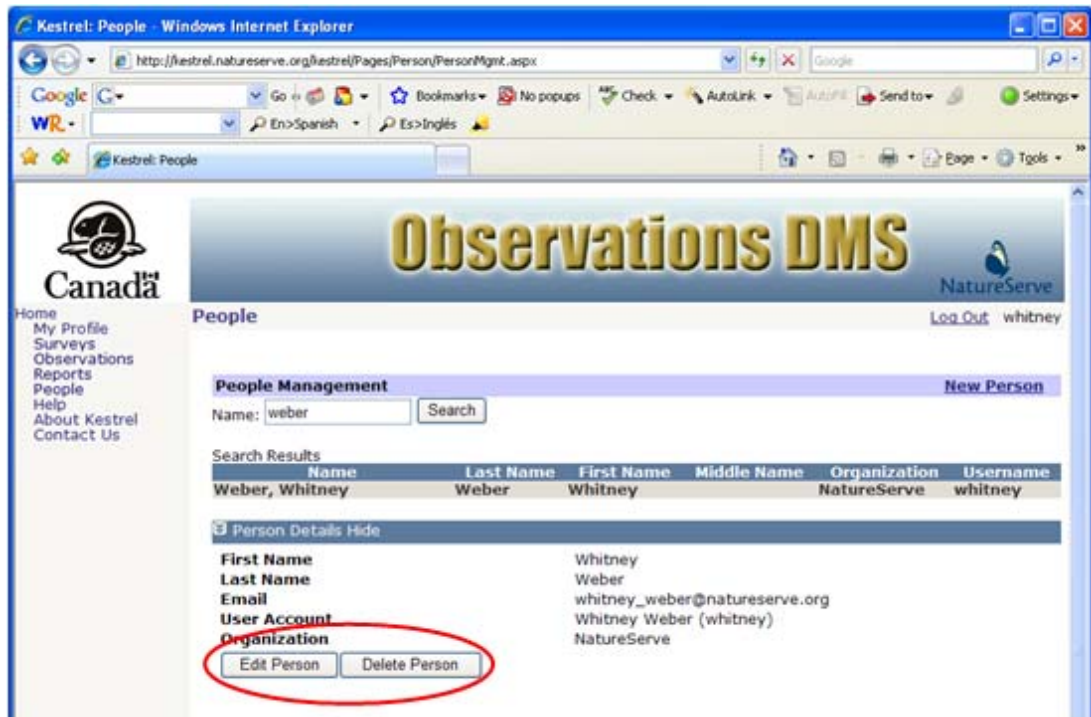
- Find a person by entering their first or last name within the Name field and click **Search**.



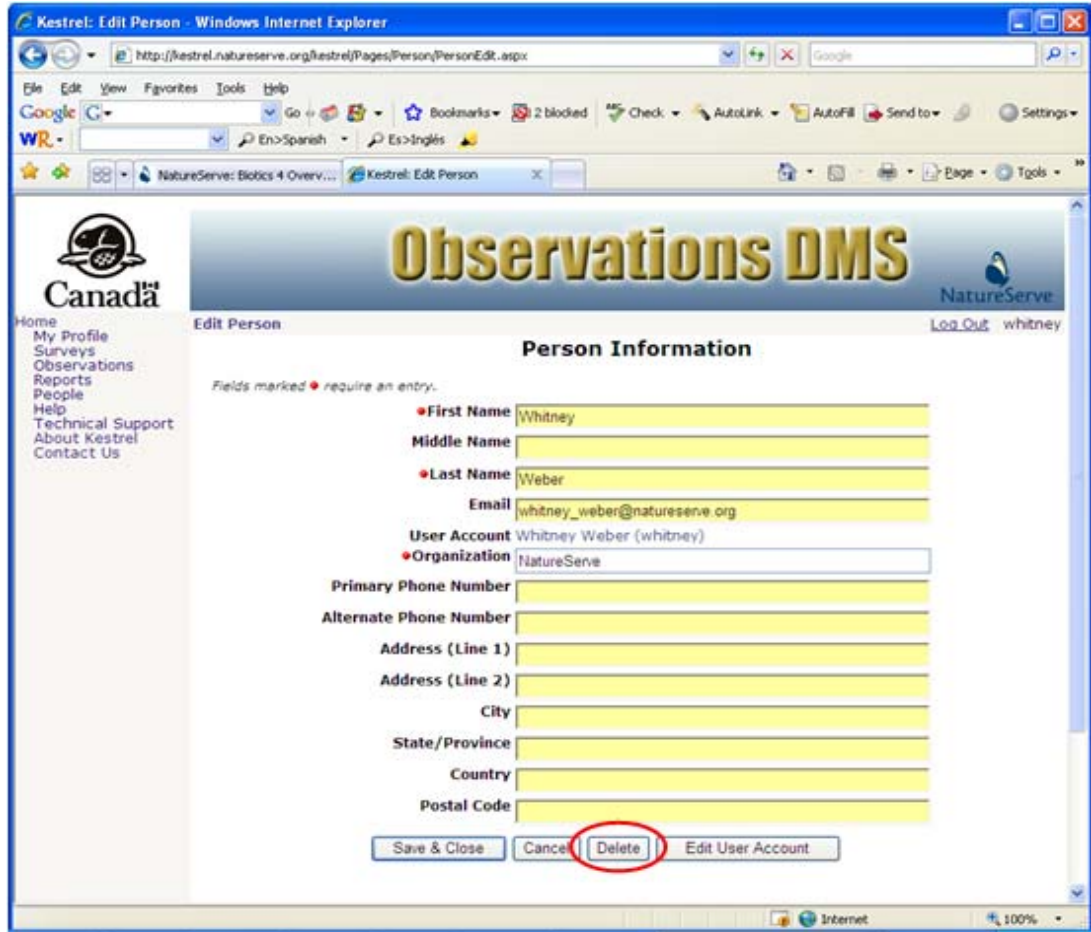
- Click on a person within the Search Results section and choose to **View**, **Edit**, or **Delete** the survey, or **Manage Observations**.



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



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



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

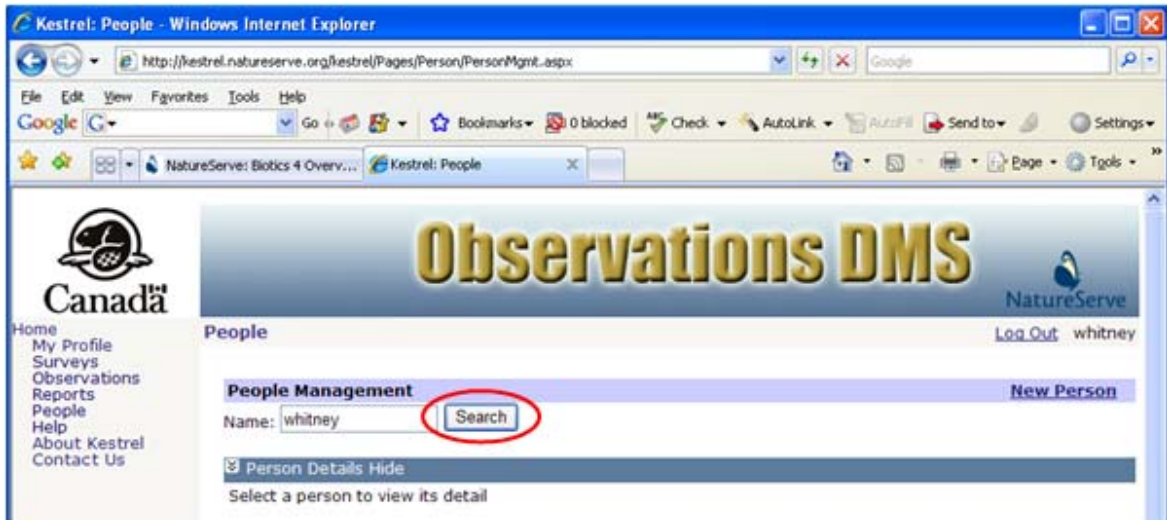
Column Name: useraccount_user_x

Display Column:

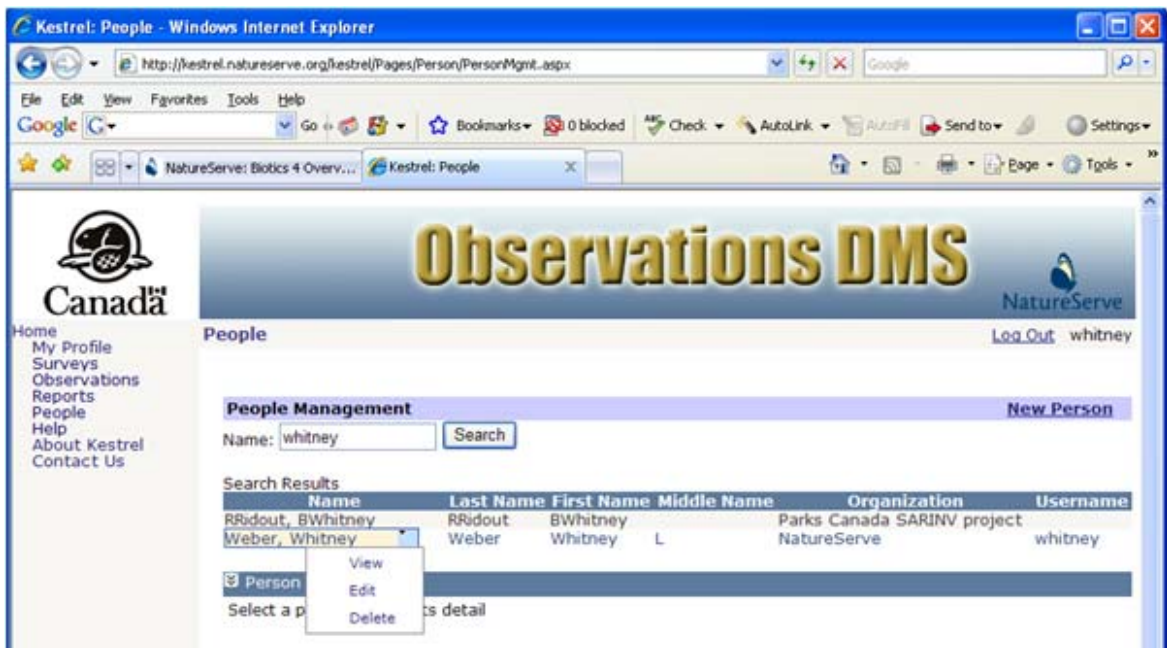
Tasks

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](#)

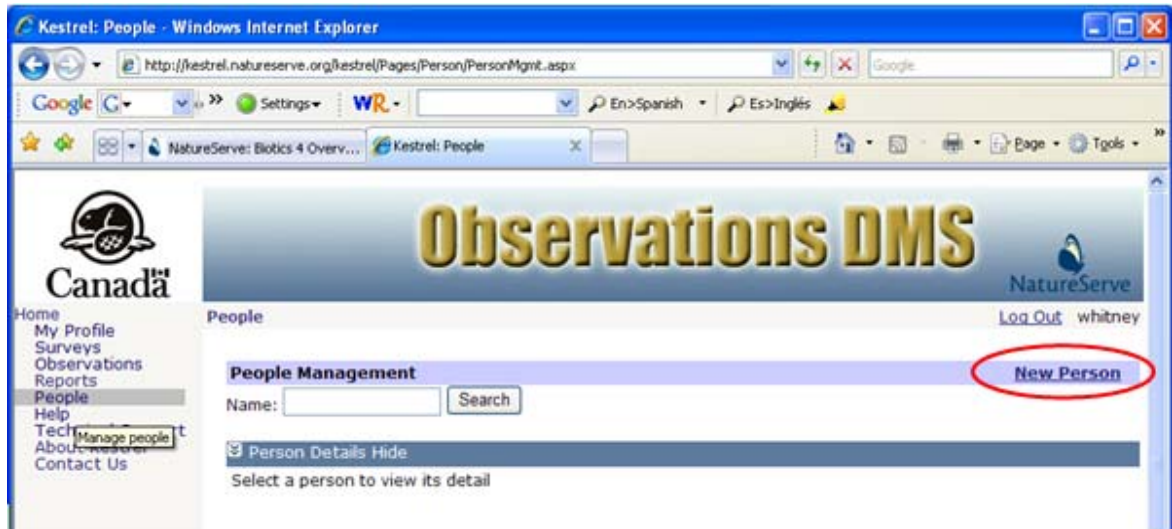
Create New Person

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.

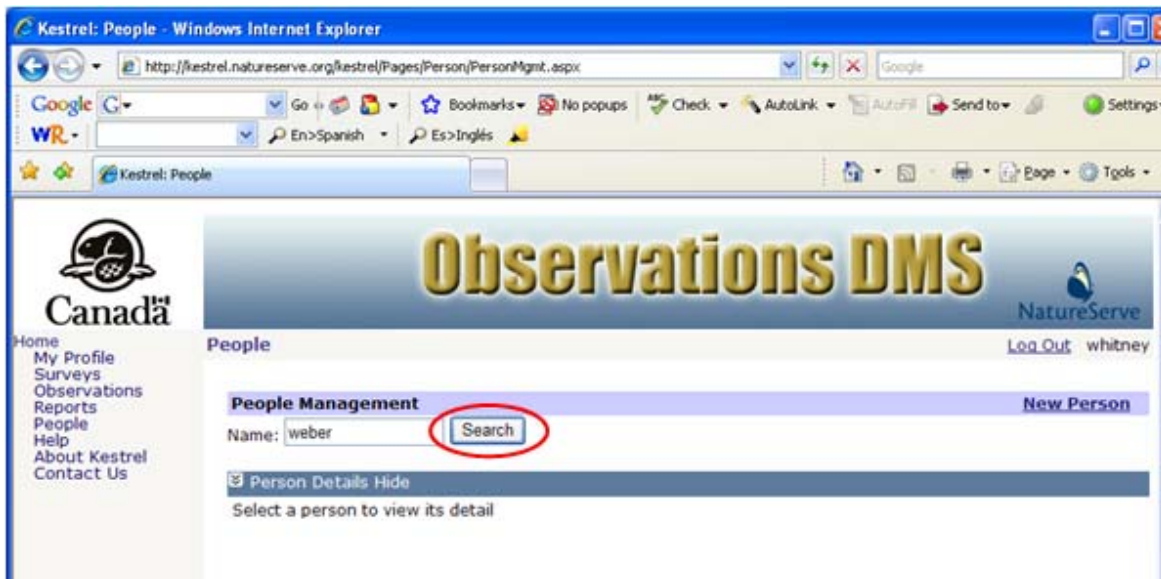
The screenshot shows a web browser window titled "Kestrel: Edit Person - Windows Internet Explorer". The address bar shows the URL "https://kestrel.natureserve.org/kestrel/Pages/Person/PersonEdit.aspx". The page header includes the "Canada" logo and "Observations DMS" with the "NatureServe" logo. A navigation menu on the left lists: Home, My Profile, Surveys, Observations, Reports, People, Lists, Help, Technical Support, About Kestrel, and Contact Us. The main content area is titled "Edit Person" and "Person Information". It includes a note: "Fields marked with a red dot require an entry." The form fields are: First Name (marked with a red dot), Middle Name, Last Name (marked with a red dot), Email, User Account, Organization (marked with a red dot), Primary Phone Number, Alternate Phone Number, Address (Line 1), Address (Line 2), City, State/Province, Country, and Postal Code. At the bottom, there are three buttons: "Save & Close" (circled in red), "Cancel", and "Create User Account".

Related Tasks:

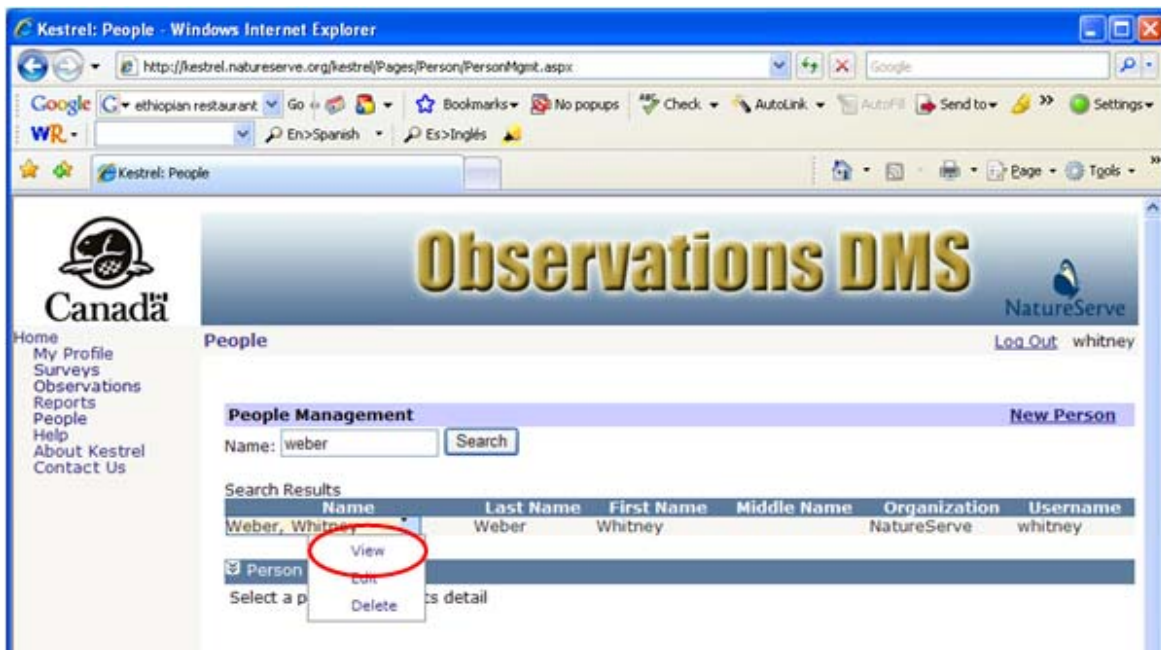
- [Create User Account](#)
- [Edit Person](#)

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:

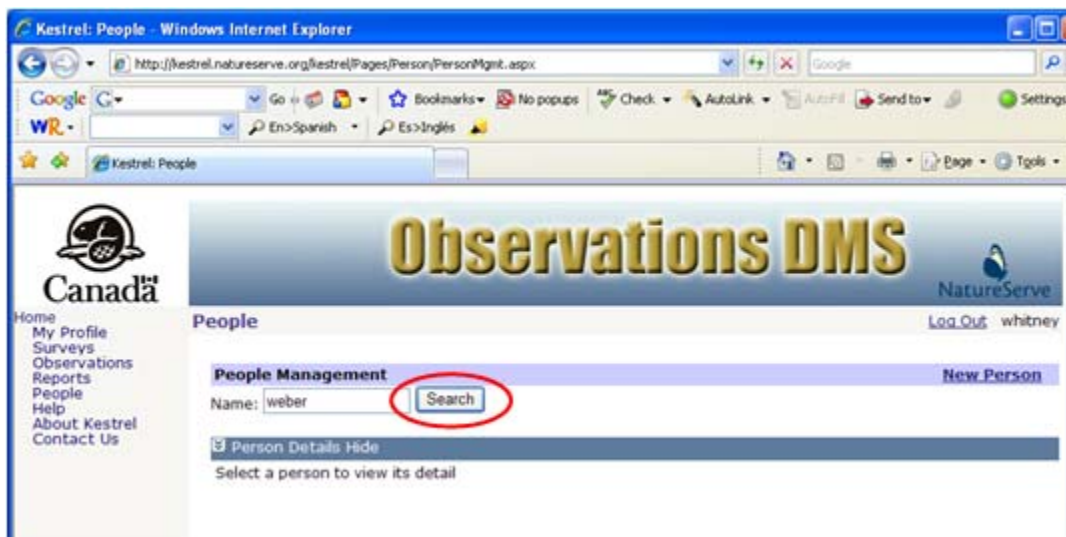
- [Edit Person](#)

- [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.

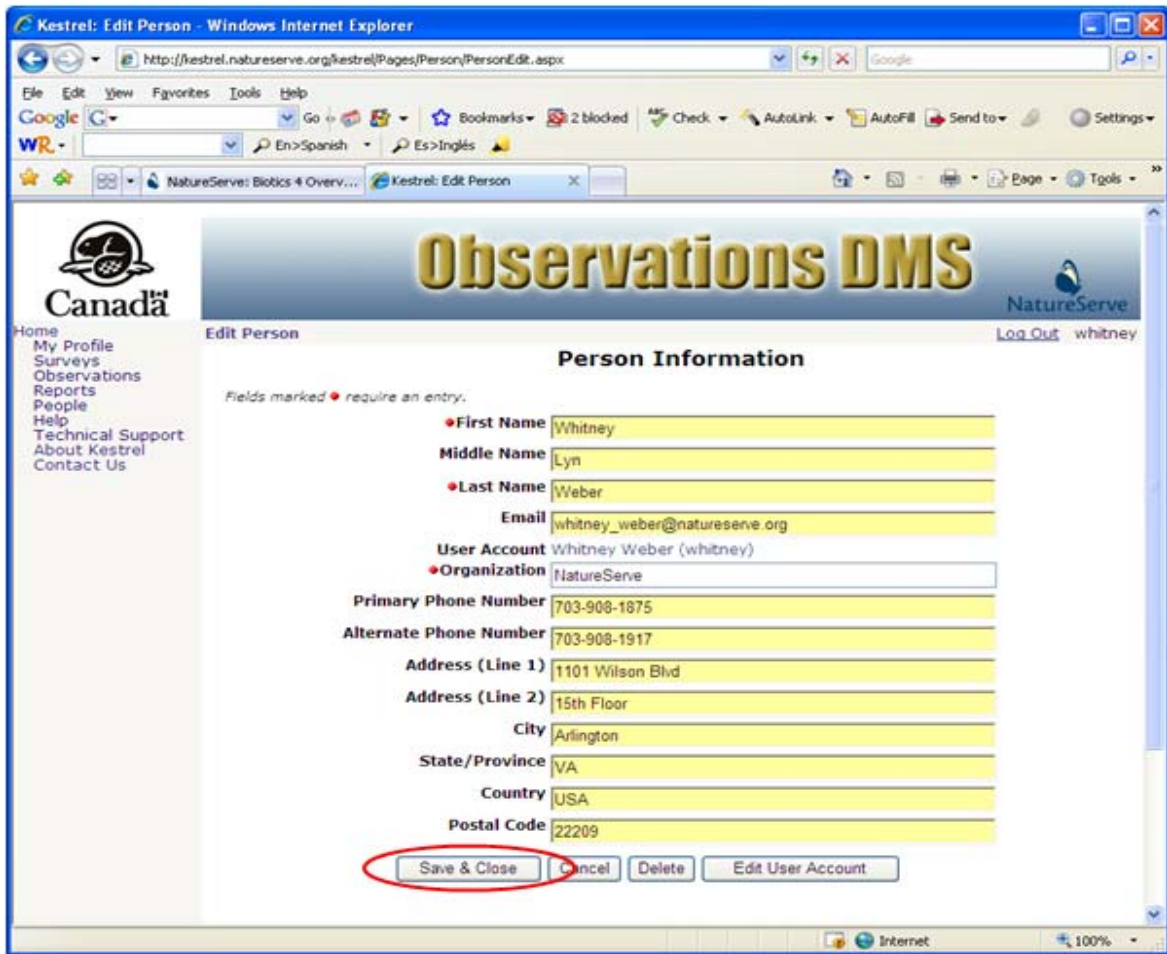
1. Within the *People* page, search for the person, by first or last name, whose record you wish to edit and choose **Search**.



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:

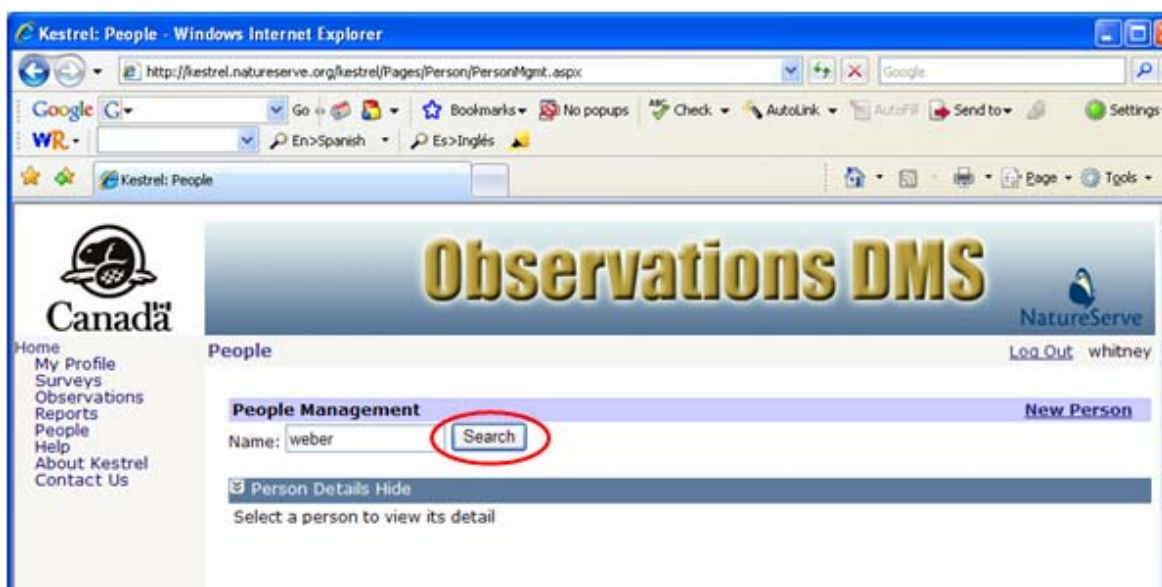
- [Edit User Account](#)
- [Create New Person](#)

Delete Person

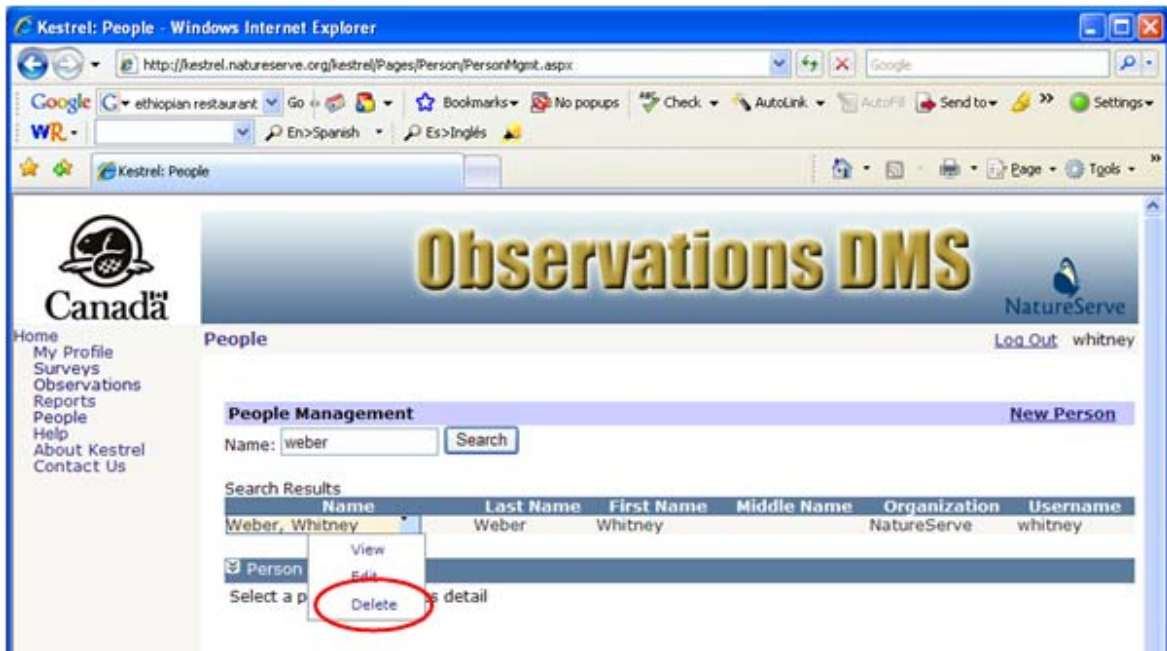
NOTE: A person record cannot be deleted if it is referenced as a Primary Observer within one or more observations or as a Survey Owner. Attempting to delete such a person record will result in the following message:



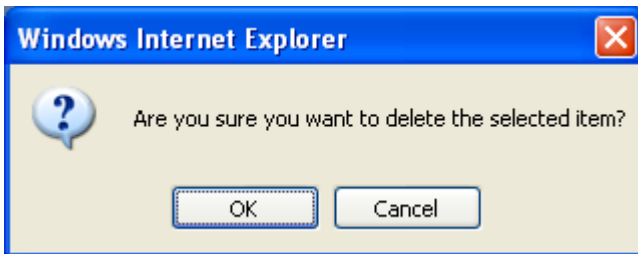
1. Within the *People* page, search for the person, by first or last name, whose record you wish to delete and choose **Search**.



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

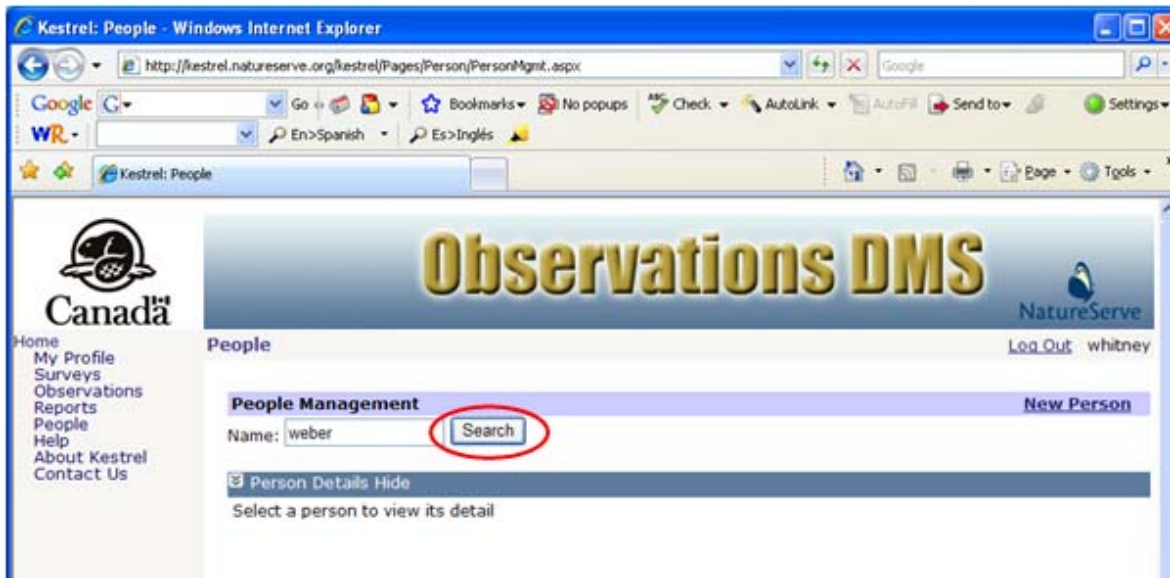


3. A popup window will prompt you as to whether you truly want to delete the Person. Click **OK** to delete the person or **Cancel** the deletion process.

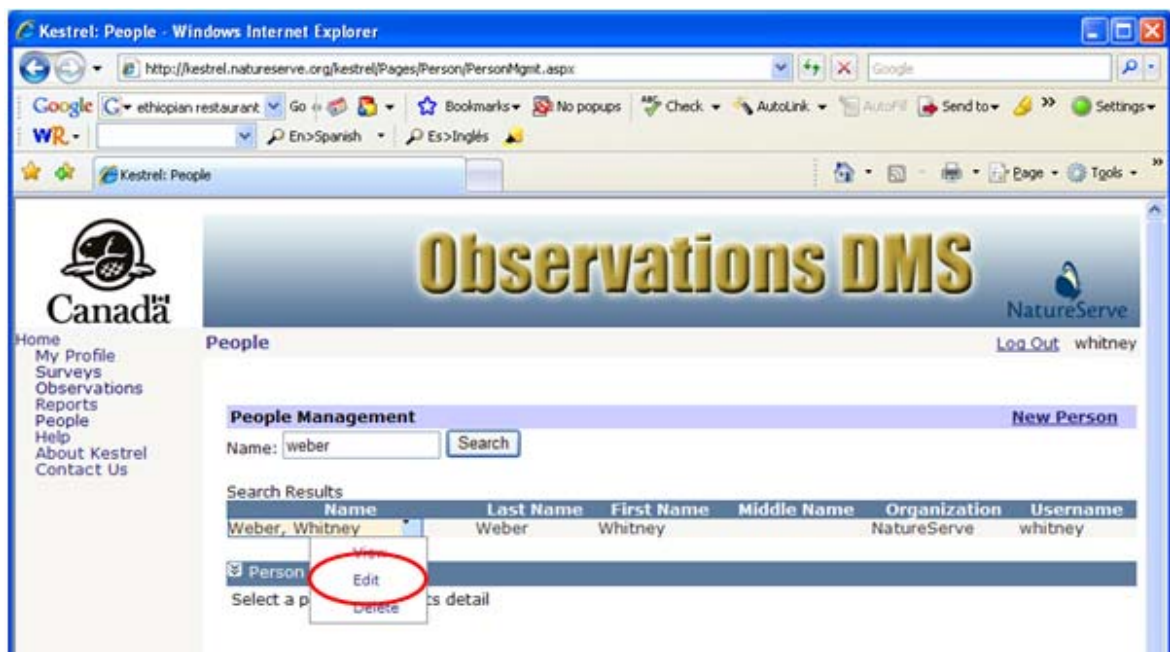


Edit Person

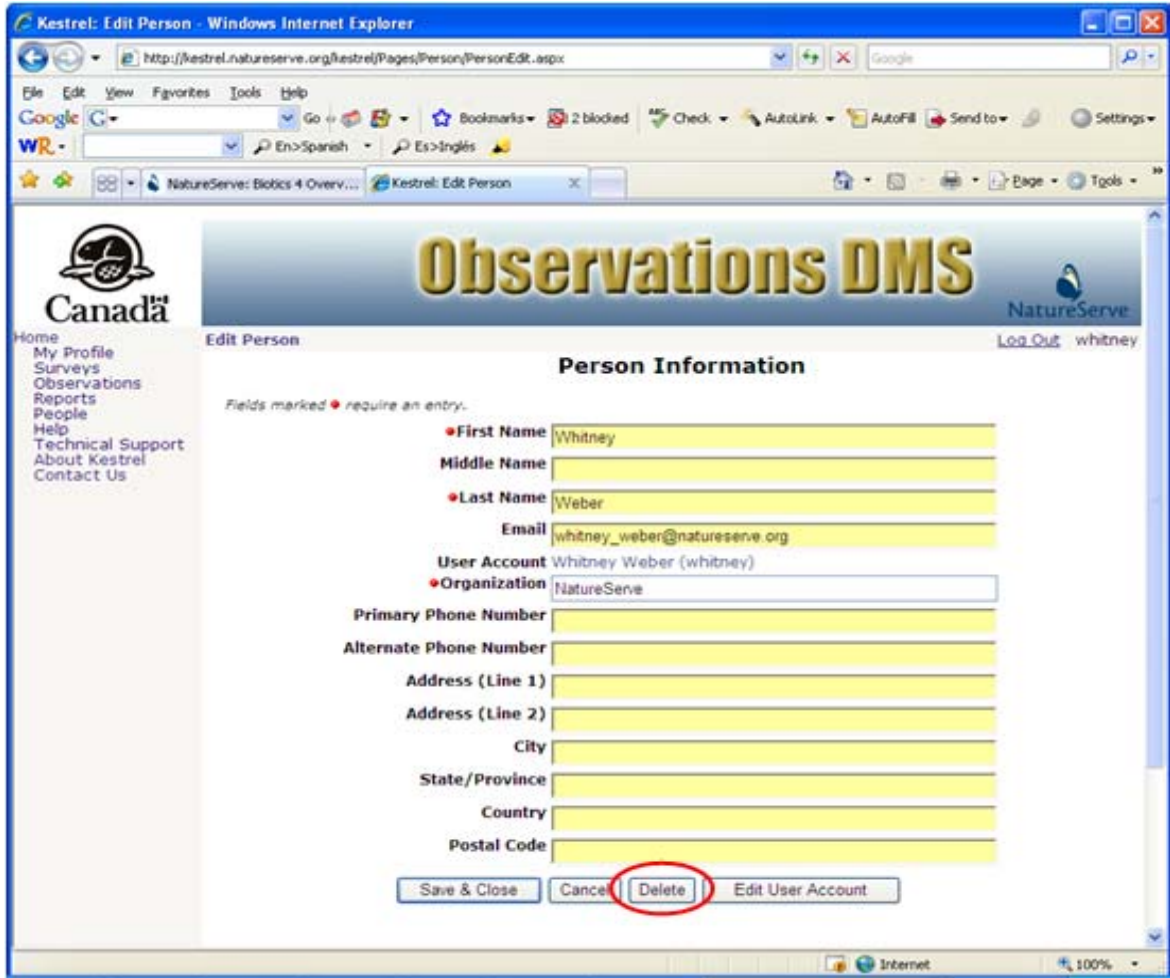
1. Within the *People* page, search for the person, by first or last name, whose record you wish to delete and choose **Search**.



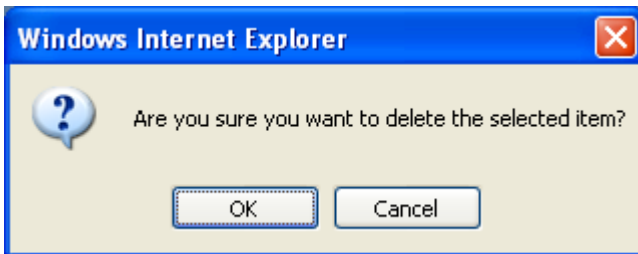
2. Click on the person's name and select **Edit** from the dropdown list.



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**.

The screenshot shows the 'Edit Person' page in Internet Explorer. The browser window title is 'Kestrel: Edit Person - Windows Internet Explorer'. The address bar shows the URL 'http://kestrel.natureserve.org/kestrel/Pages/Person/PersonEdit.aspx'. The page features the 'Observations DMS' logo and the 'Canada' logo. A navigation menu on the left includes links for Home, My Profile, Surveys, Observations, Reports, People, Help, Technical Support, About Kestrel, and Contact Us. The main content area is titled 'Person Information' and contains a form with the following fields: First Name (required), Middle Name, Last Name (required), Email, User Account, Organization, Primary Phone Number, Alternate Phone Number, Address (Line 1), Address (Line 2), City, State/Province, Country, and Postal Code. At the bottom of the form, there are three buttons: 'Save & Close', 'Cancel', and 'Create User Account'. The 'Create User Account' button is circled in red.

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**.

Kestrel: Edit Person - Windows Internet Explorer

http://kestrel.natureserve.org/kestrel/Pages/Person/PersonEdit.aspx

Google

Google C ethiopian restaurant Go No popups Check AutoLink AutoFill Send to Settings

WR

En>Spanish Es>Inglés

Kestrel: Edit Person

Canada

Observations DMS

NatureServe

Home Log Out whitney

My Profile
Surveys
Observations
Reports
People
Help
About Kestrel
Contact Us

Person Information

Fields marked • require an entry.

• First Name Whitney

Middle Name

• Last Name Weber

Email whitney_weber@natureserve

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 Changes Cancel Delete 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**.

Kestrel: Edit Person - Windows Internet Explorer

http://kestrel.natureserve.org/kestrel/Pages/Person/PersonEdit.aspx

File Edit View Favorites Tools Help

Google C- Go 2 blocked MSN Check Autolink AutoFill Send to Settings

WR- En>Spanish Es>Ingles

NatureServe: Biotics 4 Over... Kestrel: Edit Person

Canada

Home My Profile Surveys Observations Reports People Help Technical Support About Kestrel Contact Us

Observations DMS NatureServe

Edit Person Log Out whitney

Person Information

Fields marked * require an entry.

* First Name Donna

Middle Name

* Last Name Reynolds

Email donna_reynolds@natureserve.org

User Account Donna Reynolds (donna)

* 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

PersonEdit.aspx Internet 100%

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

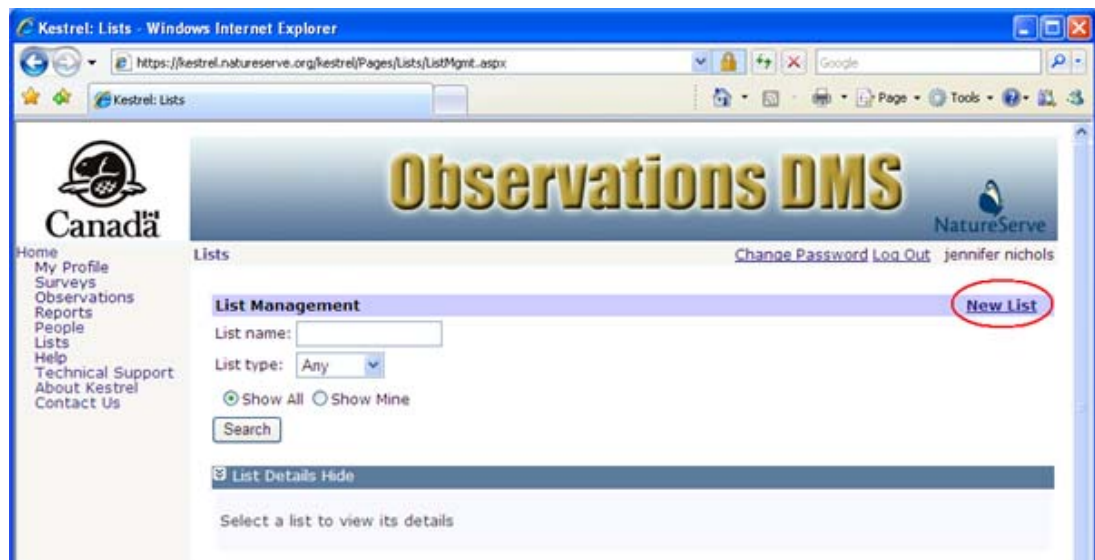
Tasks:

- [Create New List](#)
- [Select Persons](#)
- [Select Users](#)
- [Select Species](#)
- [Select Locations](#)
- [View List](#)
- [Edit List](#)
- [Delete List](#)
- [Create a Copy of a List](#)

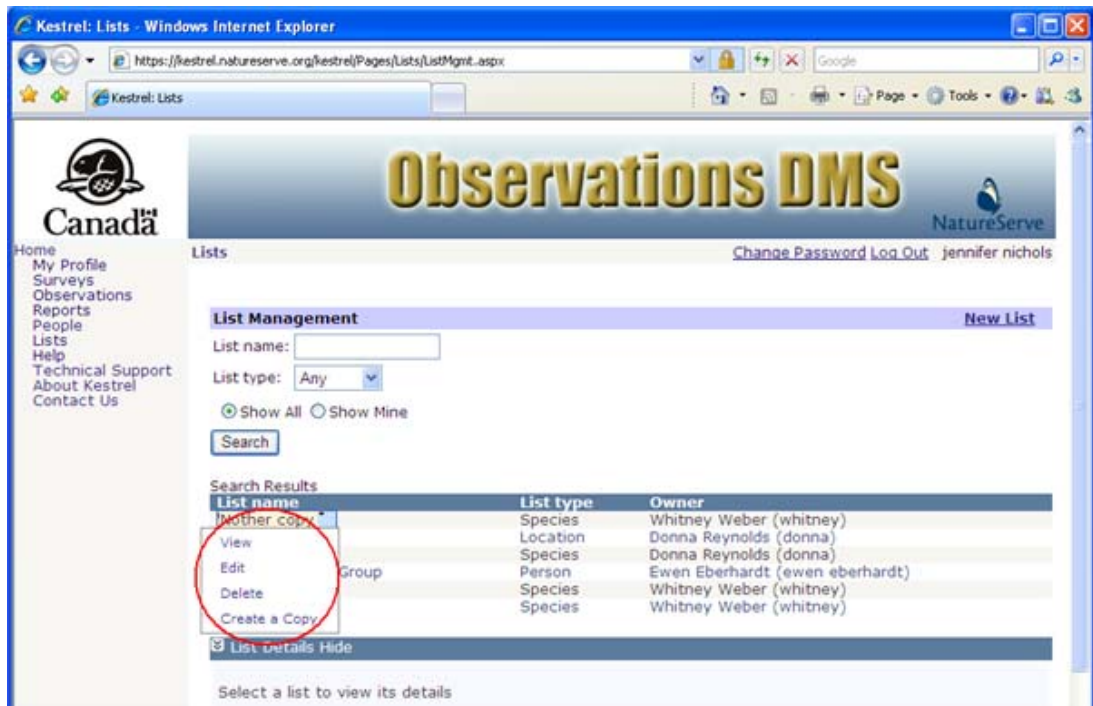
Methods of Navigation:

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

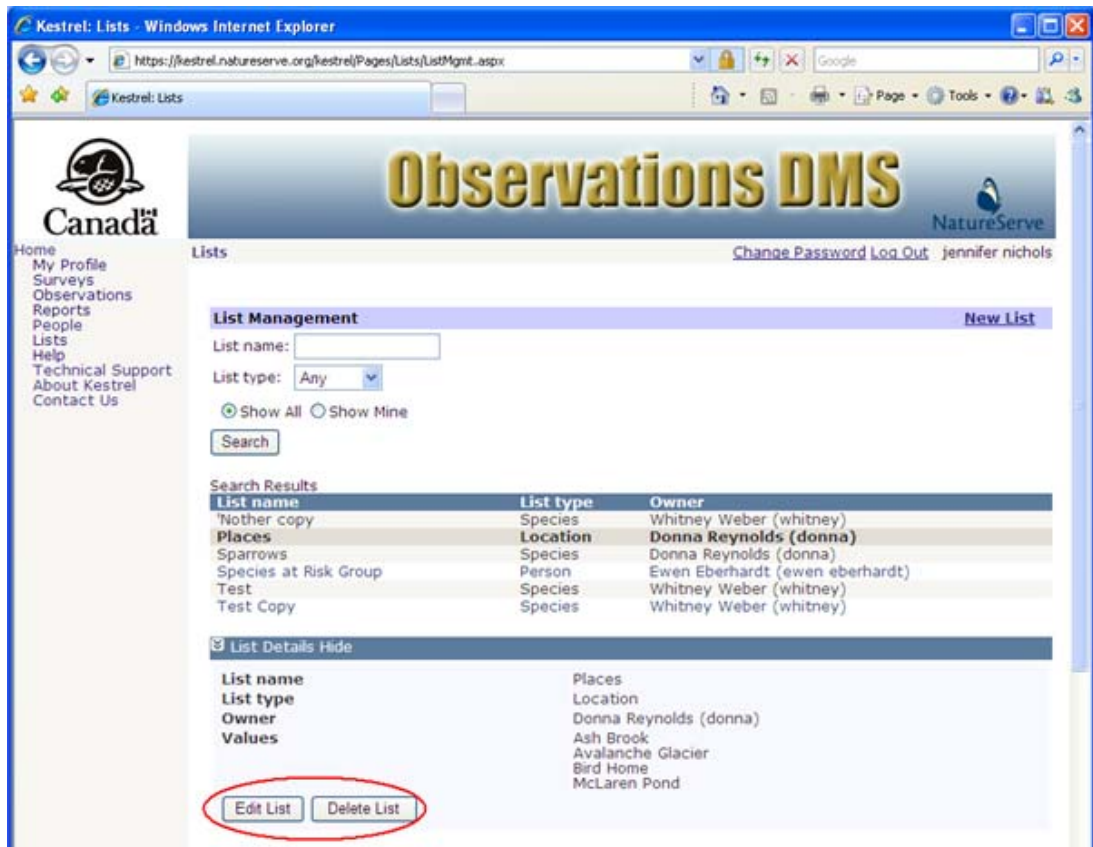
- Create a new list by clicking on the **New List** button.



- 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:

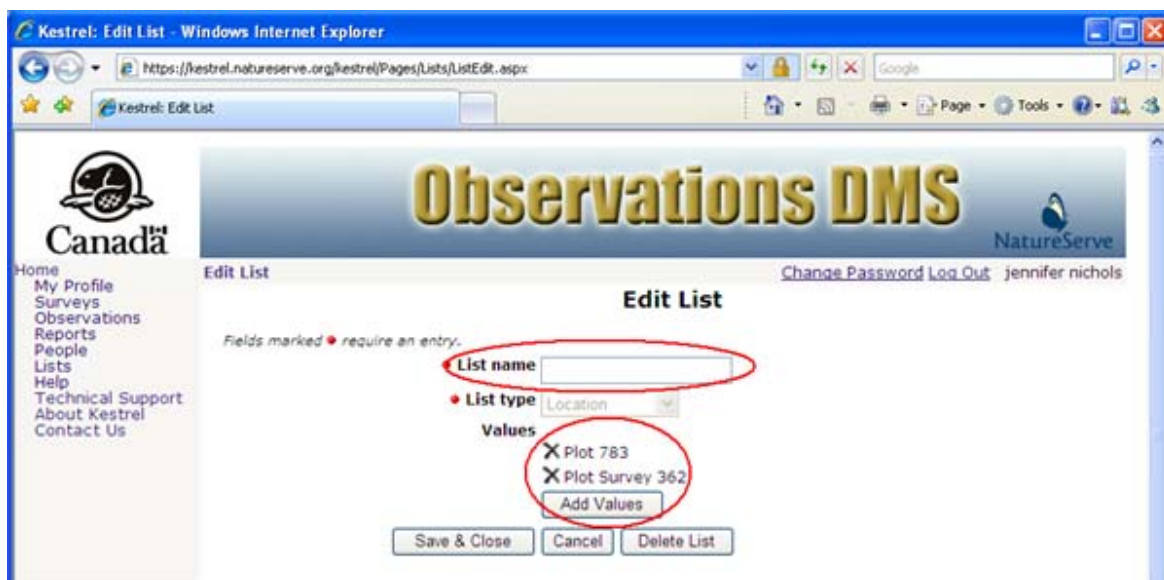
Tasks

Create a List

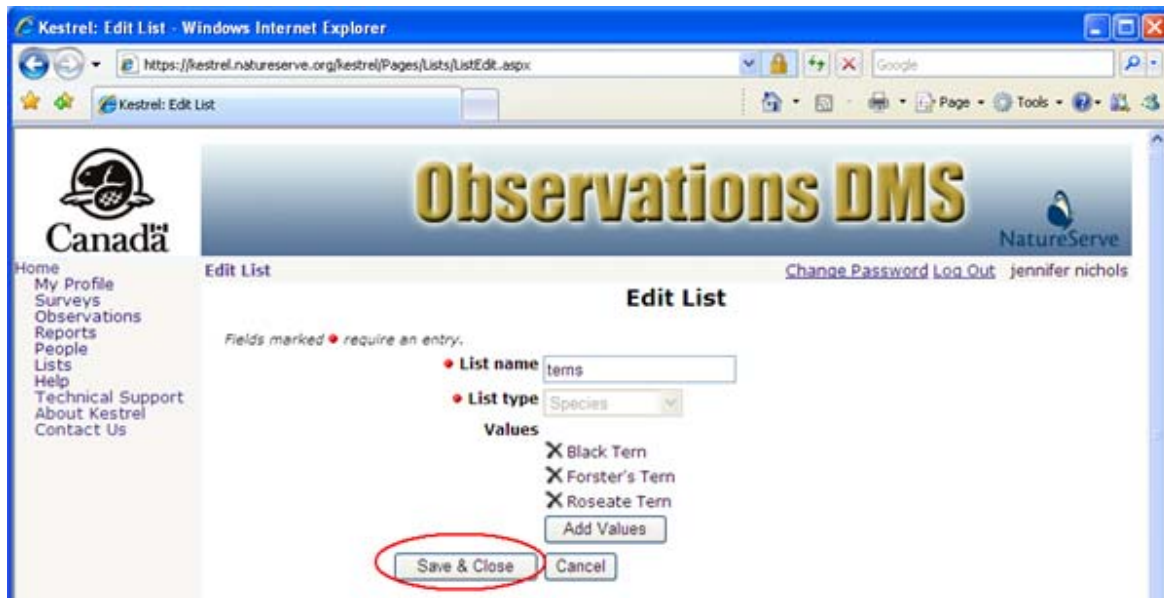
1. Within the *Lists* page, click the **New List** link.



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](#)



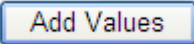
3. **Save & Close** the list.

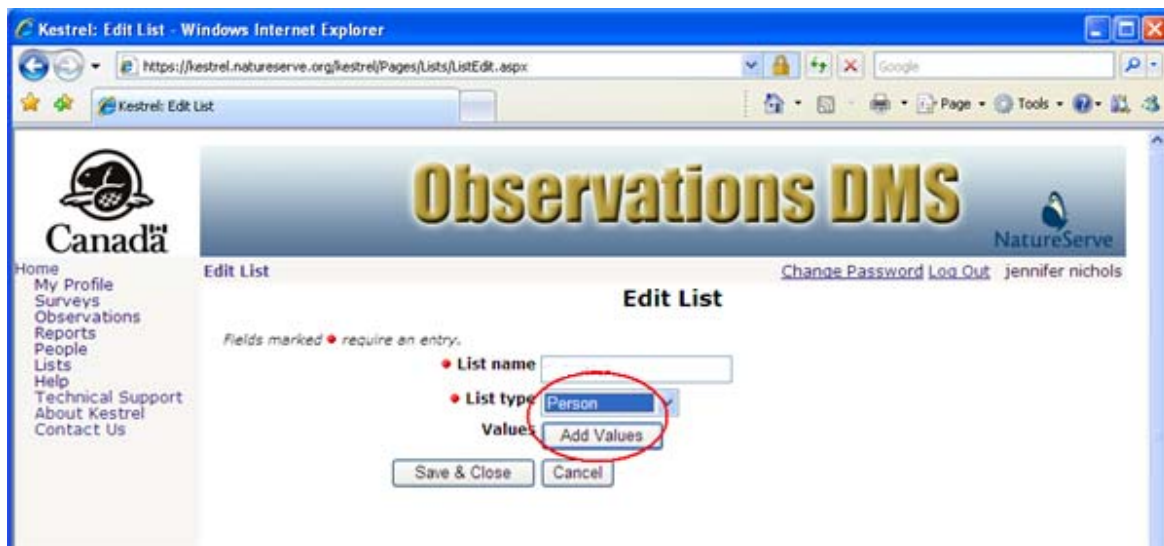


Related Tasks:

- [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.



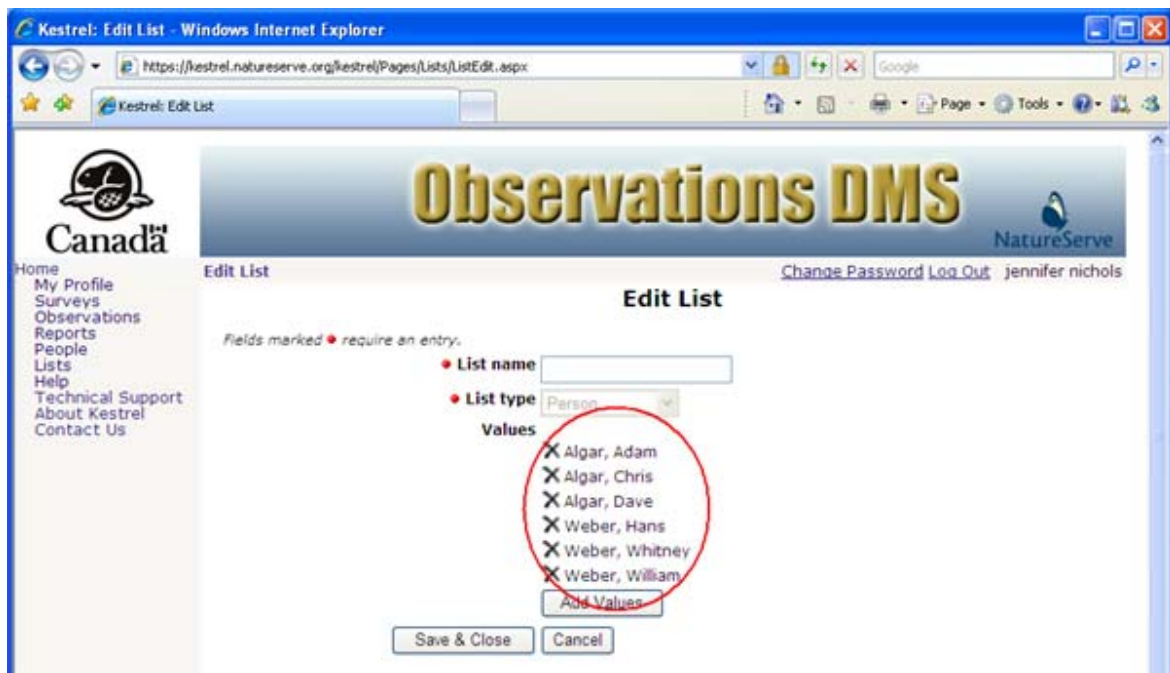
2. Within the *Select Persons* page, type in a person by first or last name and click **Search**, or to get an entire list of all person records, merely click **Search**.



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.



- 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.



- 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

Add Values



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.

Observations DMS

Select Users [Change Password](#) [Log Out](#) jennifer nichols

Search for and select one or more users

Name:

Search Results

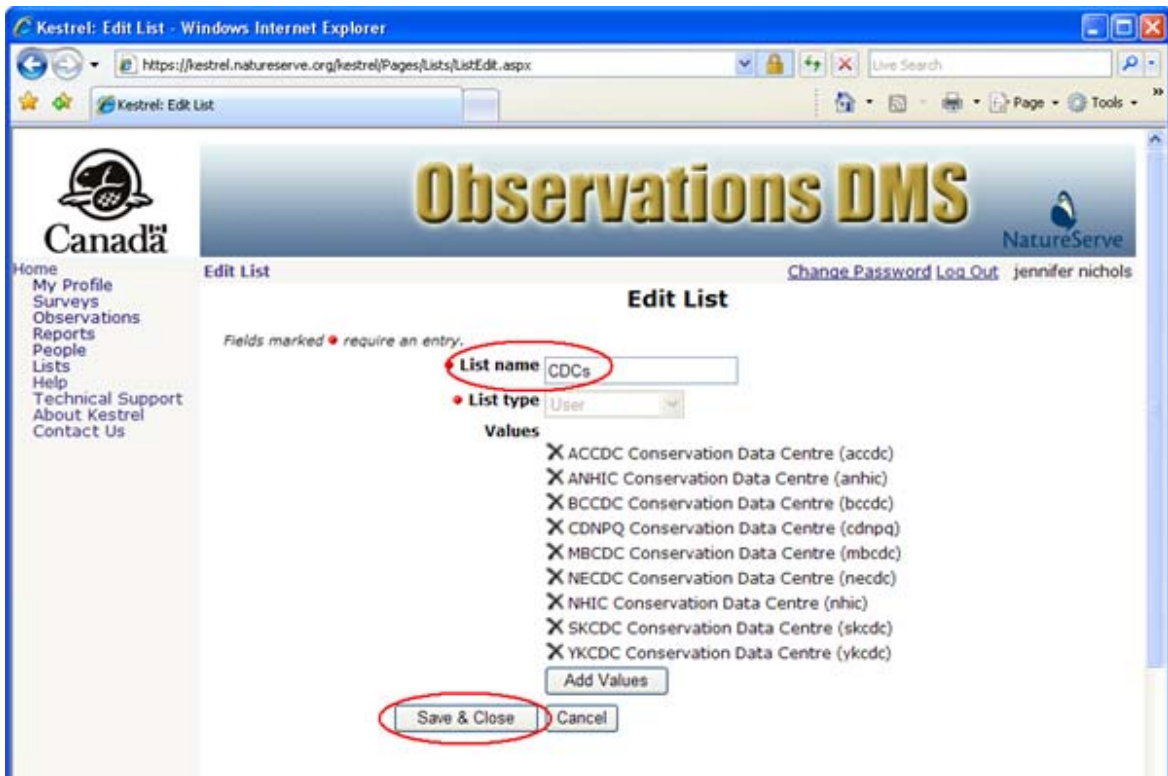
<input type="checkbox"/>	Name	Last Name	First Name	Middle Name	Organization	Username
<input checked="" type="checkbox"/>	Conservation Data Centre, ACCDC	Conservation Data Centre	ACCDC		NatureServe	accdc
<input checked="" type="checkbox"/>	Conservation Data Centre, ANHIC	Conservation Data Centre	ANHIC		NatureServe	anhic
<input checked="" type="checkbox"/>	Conservation Data Centre, BCCDC	Conservation Data Centre	BCCDC		NatureServe	bccdc
<input checked="" type="checkbox"/>	Conservation Data Centre, CDN PQ	Conservation Data Centre	CDNPQ		NatureServe	cdnpq
<input checked="" type="checkbox"/>	Conservation Data Centre, MBCDC	Conservation Data Centre	MBCDC		NatureServe	mbcdc
<input checked="" type="checkbox"/>	Conservation Data Centre, NECDC	Conservation Data Centre	NECDC		NatureServe	necdc
<input checked="" type="checkbox"/>	Conservation Data Centre, NHIC	Conservation Data Centre	NHIC		NatureServe	nhic
<input checked="" type="checkbox"/>	Conservation Data Centre, SKCDC	Conservation Data Centre	SKCDC		NatureServe	skcdc
<input checked="" type="checkbox"/>	Conservation Data Centre, YKDC	Conservation Data Centre	YKDC		NatureServe	ykcdc
<input type="checkbox"/>	curtis, steve	curtis	steve		NatureServe Canada	steve curtis
<input type="checkbox"/>	Darevic, Cathy	Darevic	Cathy		NHIC	cd
<input type="checkbox"/>	Davis, Heather	Davis	Heather		Parks Canada	heather davis
<input type="checkbox"/>	Dibb, Alain	Dibb	Alain		Parks Canada : lake louise, yoho, kootenay	alain dibb
<input type="checkbox"/>	Dionne, Suzan	Dionne	Suzan		Parks Canada	suzan dionne
<input type="checkbox"/>	Dixon, Paul	Dixon	Paul		PCA	paul dixon

1 2 3 4 5 6 7 8 9 10

- 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 **X** next to that value.



- 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

Add Values



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

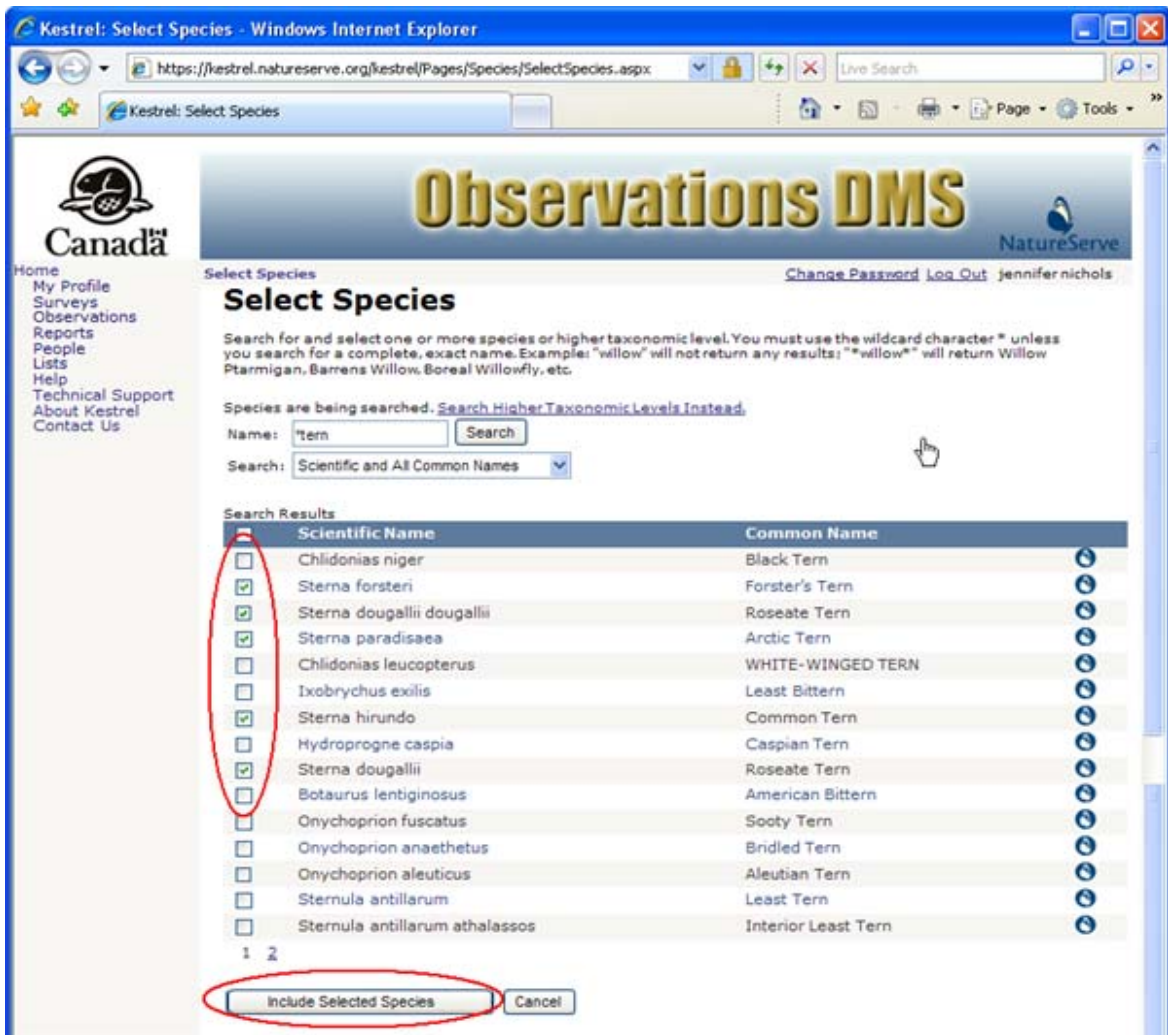
Use common or scientific name

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...)

The screenshot shows a web browser window titled "Kestrel: Select Species - Windows Internet Explorer". The address bar shows the URL "https://kestrel.natureserve.org/kestrel/Pages/Species/SelectSpecies.aspx". The page features the "Canada" logo on the left and the "Observations DMS" header in large yellow letters. Below the header, there is a navigation menu with links like "Home", "My Profile", "Surveys", "Observations", "Reports", "People", "Lists", "Help", "Technical Support", "About Kestrel", and "Contact Us". The main content area is titled "Select Species" and includes a search form. The search form has a "Name:" label, a text input field containing "tern", a "Search" button (circled in red), and a "Search:" dropdown menu set to "Scientific and All Common Names". Below the search form are two buttons: "Include Selected Species" and "Cancel". A message above the search form states: "Species are being searched. [Search Higher Taxonomic Levels Instead.](#)"

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.



- 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 **X** next to that value.

Kestrel: Edit List - Windows Internet Explorer

https://kestrel.natureserve.org/kestrel/Pages/Lists/ListEdit.aspx

Observations DMS

Canada NatureServe

Edit List

Fields marked ● require an entry.

● list name

● list type Species

Values

- Arctic Tern
- Common Tern
- Forster's Tern
- Roseate Tern
- Roseate Tern

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.

Kestrel: Edit List - Windows Internet Explorer

https://kestrel.natureserve.org/kestrel/Pages/Lists/ListEdit.aspx

Observations DMS

Canada NatureServe

Edit List

Fields marked ● require an entry.

● list name terns

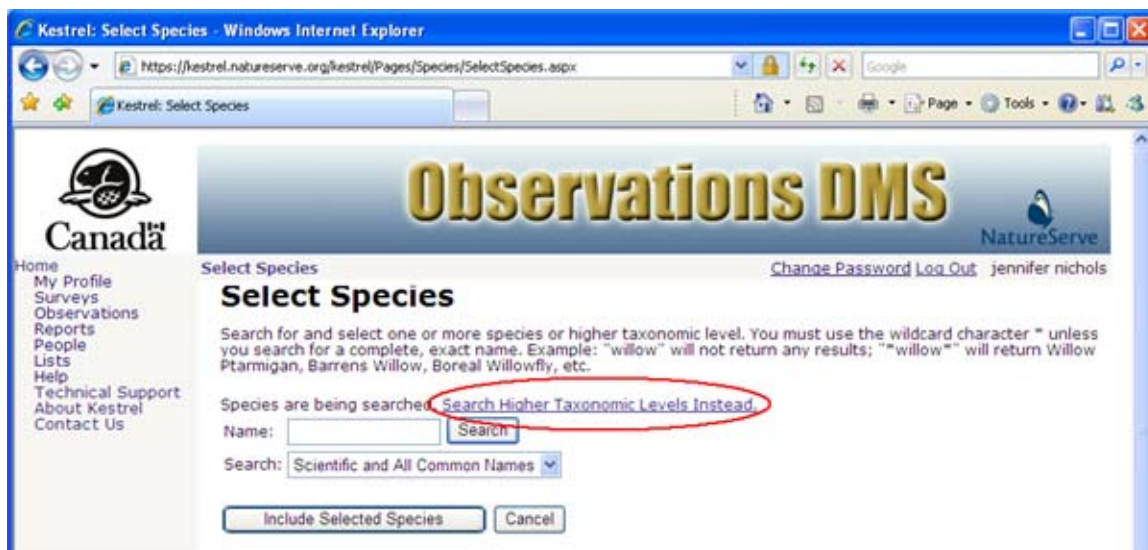
● list type Species

Values

- Arctic Tern
- Common Tern
- Forster's Tern
- Roseate Tern
- Roseate Tern

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).

Observations DMS

Select Species [Change Password](#) [Log Out](#) jennifer nichols

Select Species

Search for and select one or more species or higher taxonomic level. You must use the wildcard character * unless you search for a complete, exact name. Example: "willow" will not return any results; "willow*" will return Willow Ptarmigan, Barrens Willow, Boreal Willowfly, etc.

Higher Taxonomic Levels are being searched. [Search Species Instead.](#)

Name:

Kingdom:

Search Results

<input type="checkbox"/>	Scientific Name	Common Name	
<input type="checkbox"/>	Amburana	no common name	!
<input checked="" type="checkbox"/>	Dicranaceae	no common name	!
<input checked="" type="checkbox"/>	Dicranales	no common name	!
<input type="checkbox"/>	Fletcherana	no common name	!
<input type="checkbox"/>	Granatellus	no common name	!
<input type="checkbox"/>	Metaporana	no common name	!
<input type="checkbox"/>	Millegrana	no common name	!
<input type="checkbox"/>	Phaedranassa	no common name	!
<input type="checkbox"/>	Porana	no common name	!
<input type="checkbox"/>	Provancherana	no common name	!
<input type="checkbox"/>	Rana	no common name	!
<input type="checkbox"/>	Ranalisma	no common name	!
<input type="checkbox"/>	Ranatra	no common name	!
<input type="checkbox"/>	Rapubiarana	no common name	!
<input type="checkbox"/>	Rupirana	no common name	!

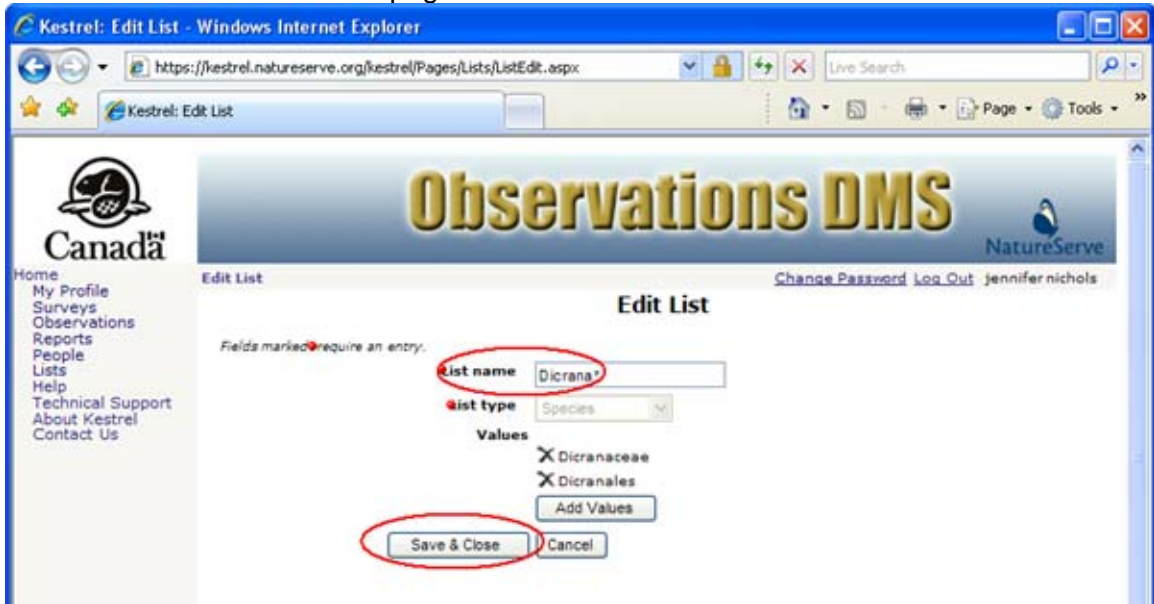
1 2

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 **X** next to that value.



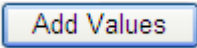
5. When all selections for the list have been made, enter a name for the list and click **Save & Close** to return to the *Lists* page.



Related Tasks:

- [Create New List](#)
- [Edit List](#)

Select Locations

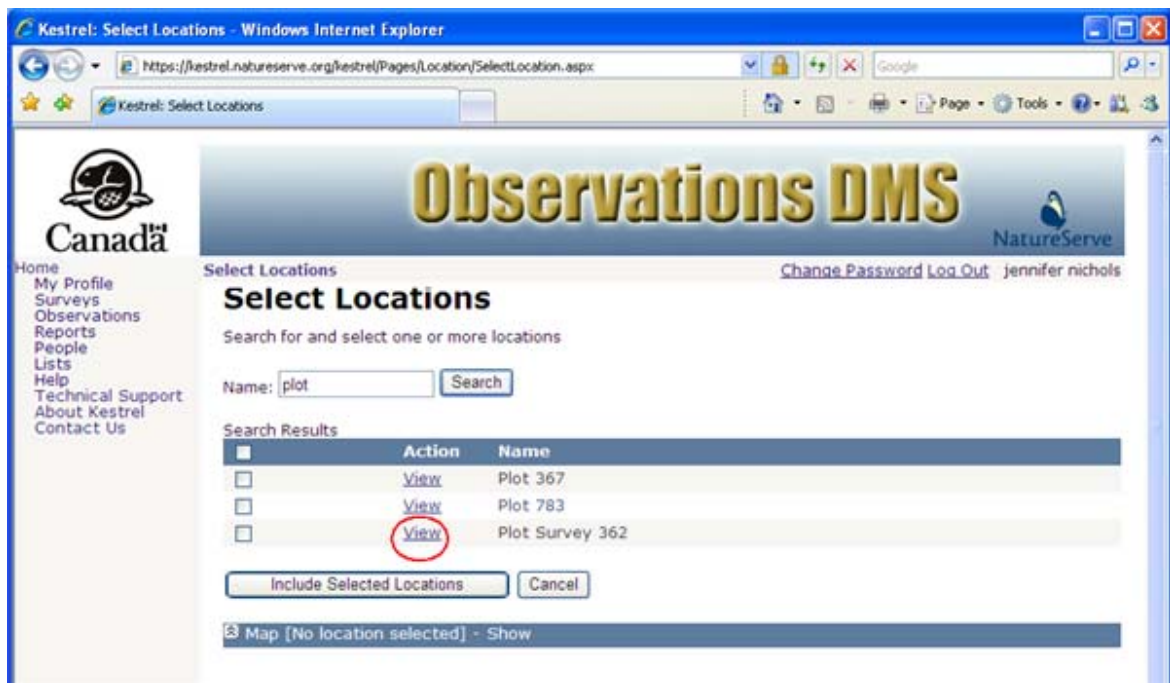
1. Within the *Edit List* page, select Location as the List Type, and click the  button to select the values for the list.



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.

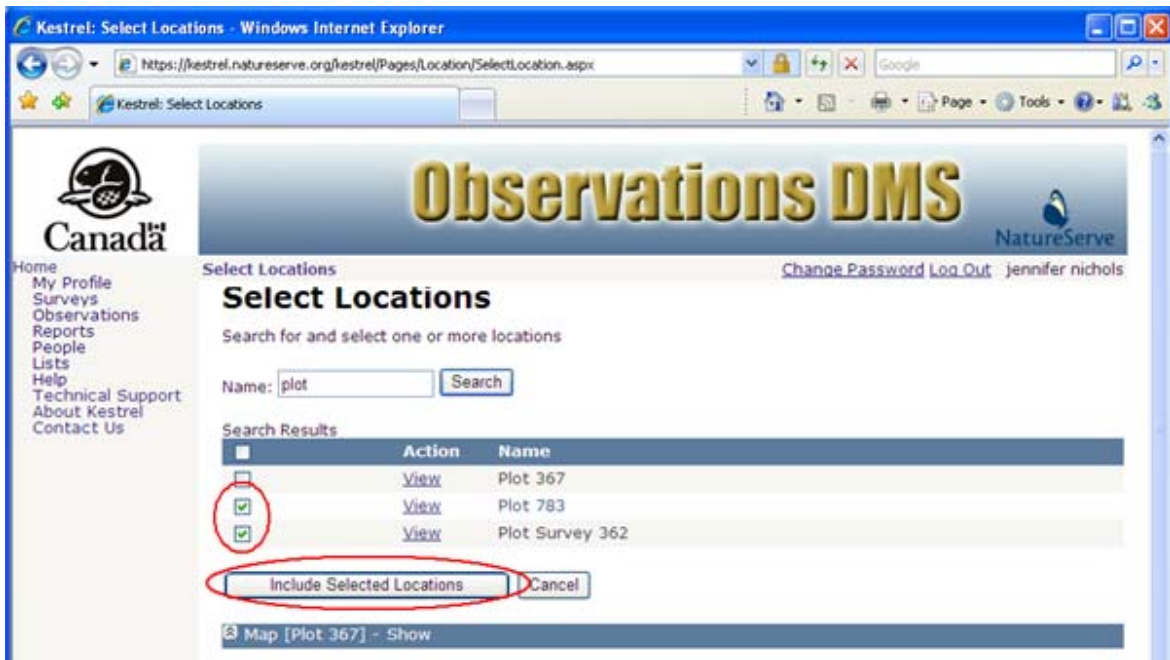
The screenshot shows the 'Observations DMS' web application in Internet Explorer. The page title is 'Select Locations'. The search bar contains the text 'plot'. The search results table is as follows:

<input type="checkbox"/>	Action	Name
<input type="checkbox"/>	View	Plot 367
<input type="checkbox"/>	View	Plot 783
<input type="checkbox"/>	View	Plot Survey 362

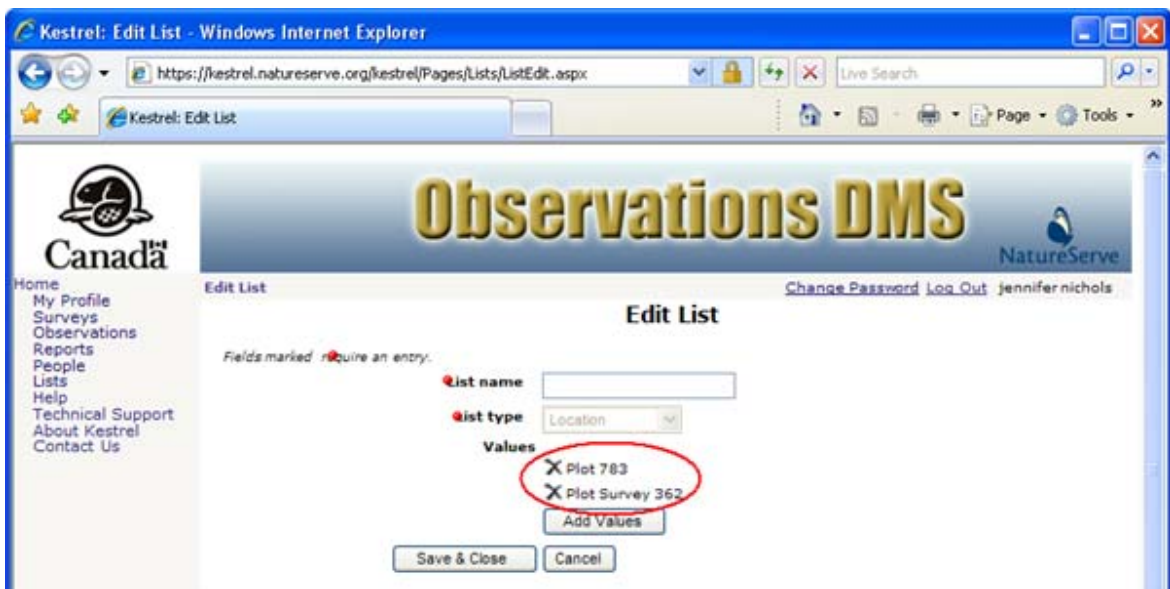
Below the table are buttons for 'Include Selected Locations' and 'Cancel'. A red circle highlights the 'Map [Plot Survey 362] - Hide' link. The map view shows a topographic map with various mountain peaks labeled, including Mt. Shaughnessy, Mount Rogers, Mount Sifton, Grizzly Mtn, and Mount Macdonald. The 'Map Layers' panel on the left is expanded, showing checked boxes for 'Map Layers', 'Provinces', 'National Parks', '1:50,000', '1:250,000', and 'Contour'.

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.



- 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 **X** next to that value.



- 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.

Kestrel: Edit List - Windows Internet Explorer

https://kestrel.natureserve.org/kestrel/Pages/Lists/ListEdit.aspx

Kestrel: Edit List

Canada

Home
My Profile
Surveys
Observations
Reports
People
Lists
Help
Technical Support
About Kestrel
Contact Us

Observations DMS

NatureServe

Edit List

Change Password Log Out jennifer.nichols

Edit List

Fields marked * require an entry.

* List name Happy Valley

* List type Location

Values

Plot 783

Plot Survey 362

Add Values

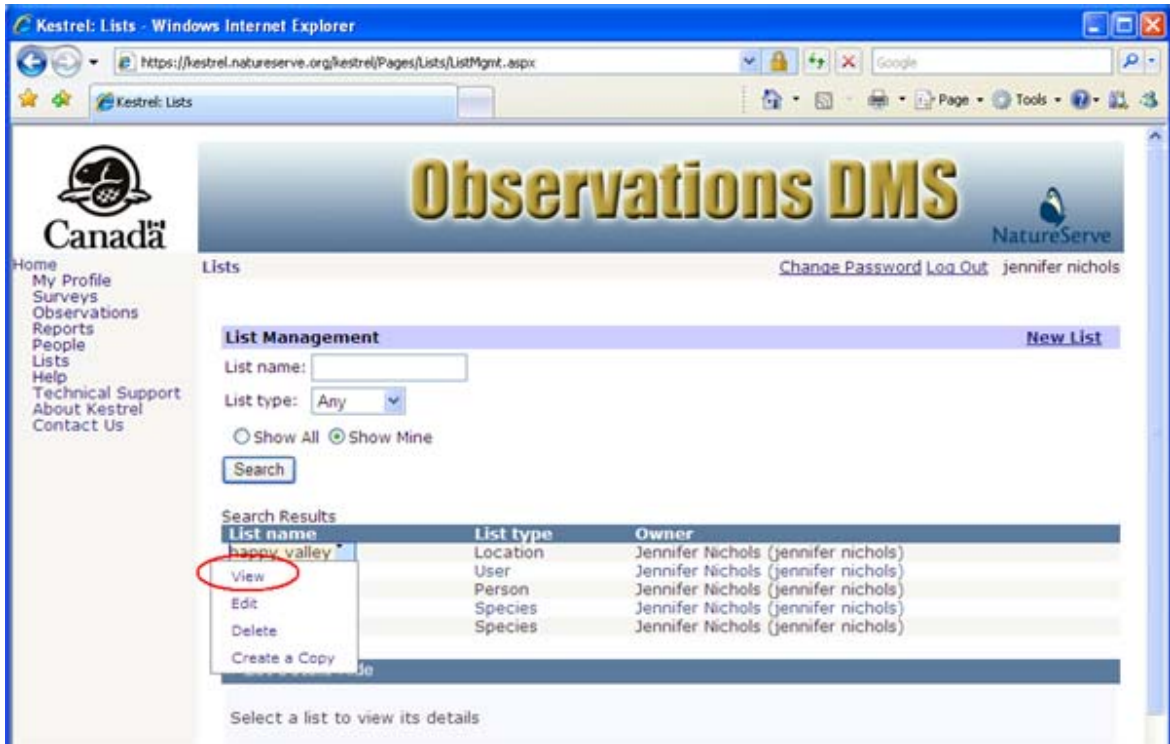
Save & Close Cancel

Related Tasks:

- [Create New List](#)
- [Edit List](#)

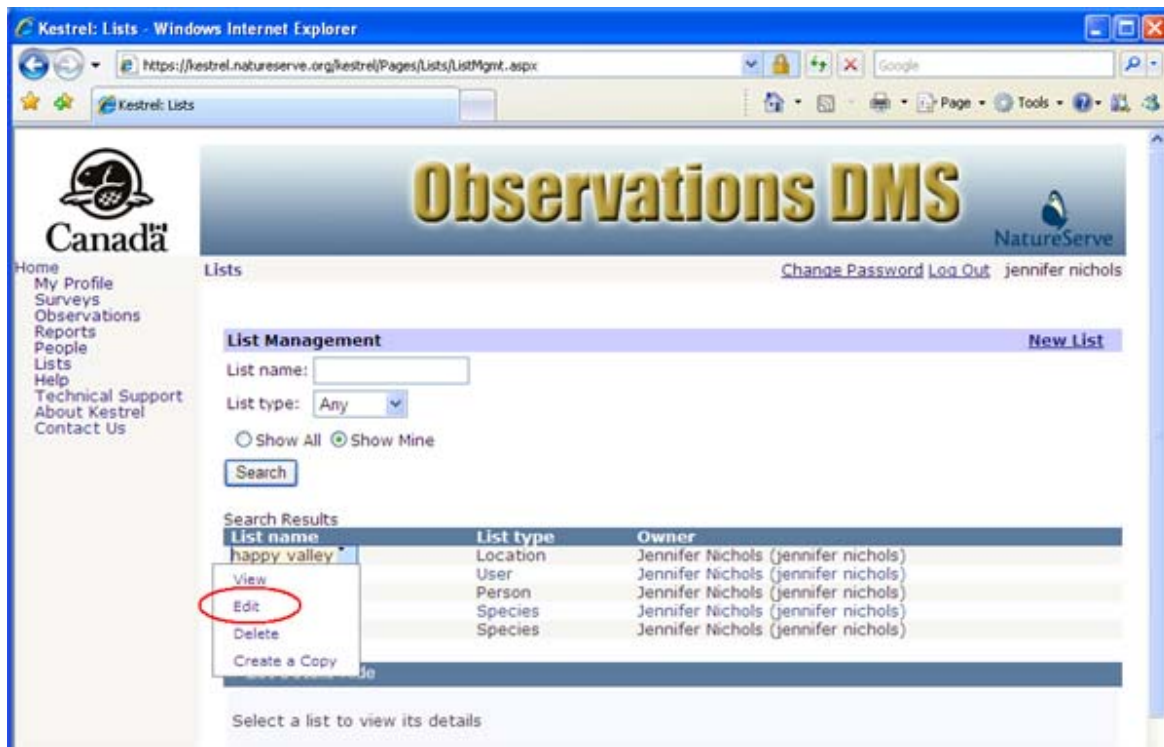
View List

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.

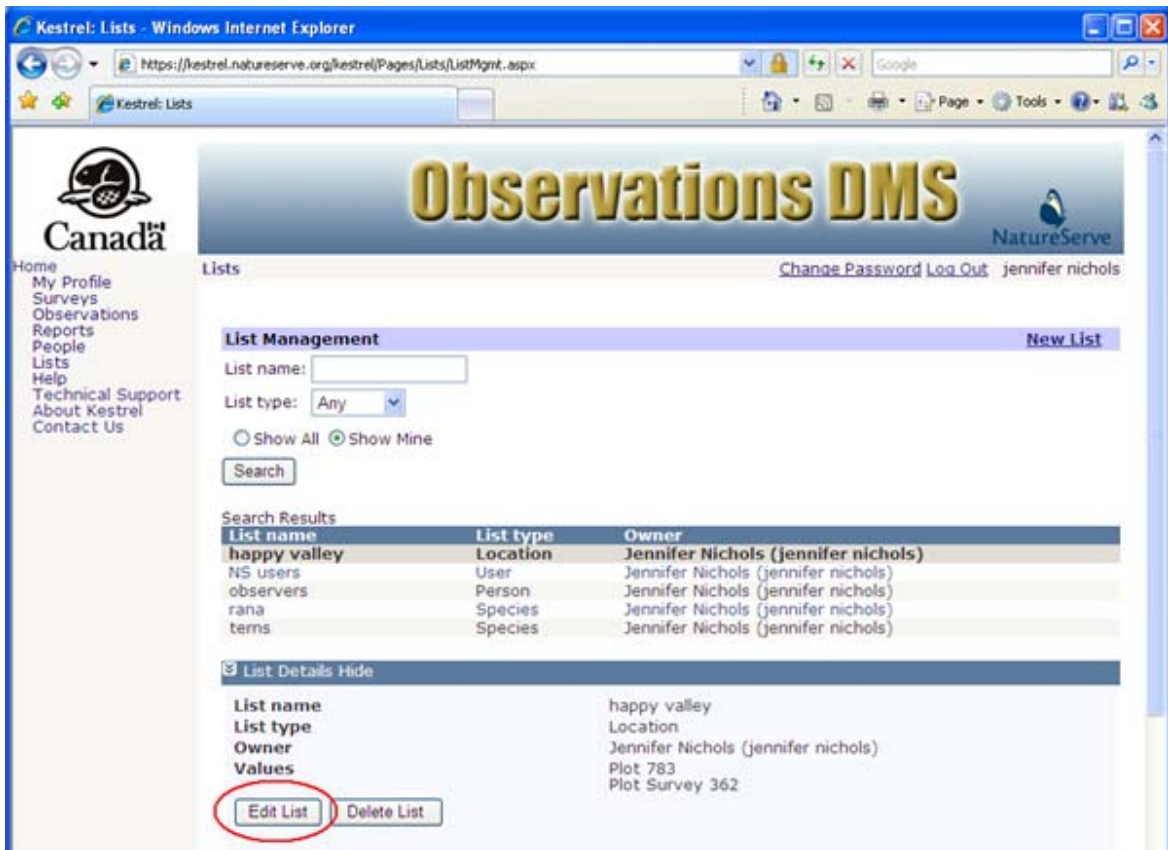


The screenshot shows the 'Observations DMS' interface in Internet Explorer. The browser address bar displays 'https://kestrel.natureserve.org/kestrel/Pages/Lists/ListMgmt.aspx'. The page header includes the 'Canada' logo and 'NatureServe' branding. A navigation menu on the left lists options like 'Home', 'My Profile', 'Surveys', 'Observations', 'Reports', 'People', 'Lists', 'Help', 'Technical Support', 'About Kestrel', and 'Contact Us'. The main content area is titled 'List Management' and includes a 'New List' button. Below this, there are search filters for 'List name', 'List type', and 'Show All/Show Mine'. A search button is present. The search results table has columns for 'List name', 'List type', and 'Owner'. The first row is 'happy valley' with a dropdown menu open over it, showing options: 'View', 'Edit', 'Delete', and 'Create a Copy'. The 'Edit' option is circled in red. Below the table, there is a prompt: 'Select a list to view its details'.

List name	List type	Owner
happy valley	Location	Jennifer Nichols (jennifer nichols)
	User	Jennifer Nichols (jennifer nichols)
	Person	Jennifer Nichols (jennifer nichols)
	Species	Jennifer Nichols (jennifer nichols)
	Species	Jennifer Nichols (jennifer nichols)

- OR -

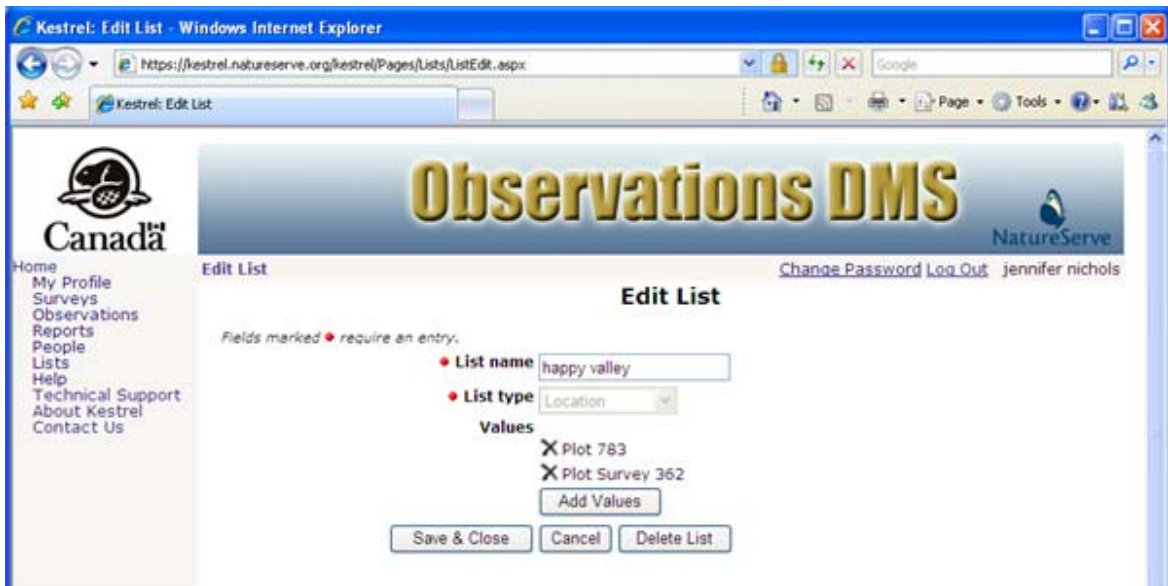
Alternatively, if you have already chosen to View the list, within the List Details section select Edit List.



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.

The screenshot shows a web browser window titled "Kestrel: Edit List - Windows Internet Explorer". The address bar shows the URL "https://kestrel.natureserve.org/kestrel/Pages/Lists/ListEdit.aspx". The page features the "Canada" logo on the left and "Observations DMS" in large yellow letters at the top. Below the title, there is a navigation menu with links like "Home", "My Profile", "Surveys", "Observations", "Reports", "People", "Lists", "Help", "Technical Support", "About Kestrel", and "Contact Us". The main content area is titled "Edit List" and contains a form with the following fields:

- List name:** happy valley
- List type:** Location
- Values:** A list of values with checkboxes: "Plot 763" and "Plot Survey 362".

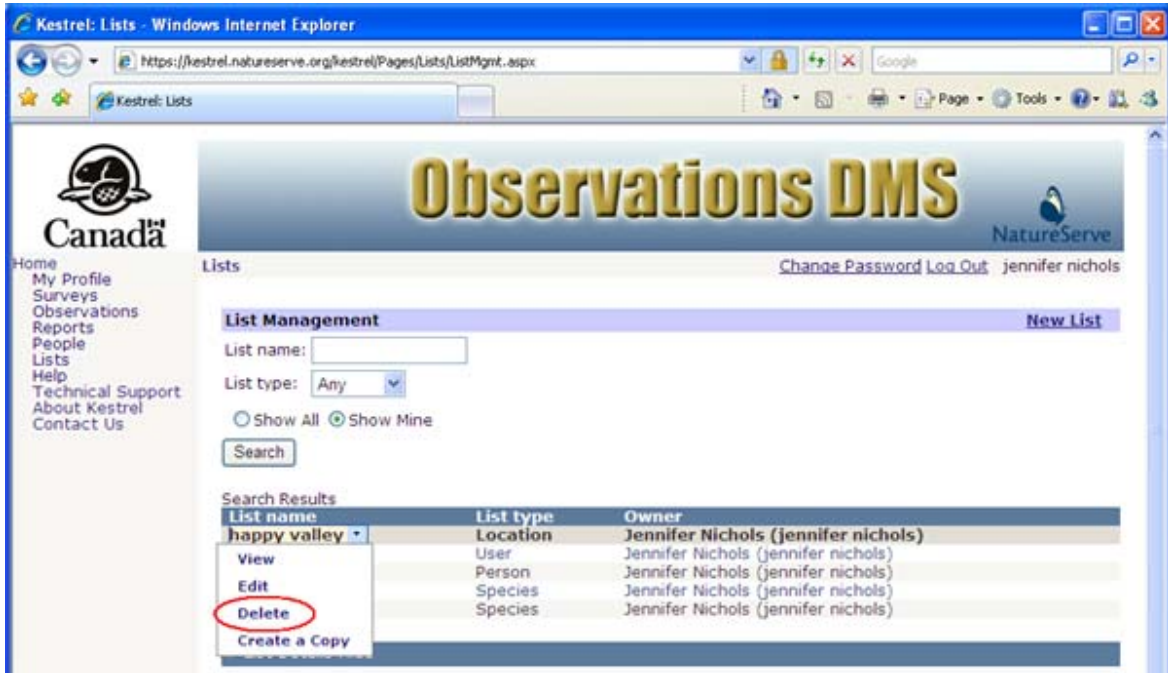
At the bottom of the form, there are three buttons: "Save & Close" (circled in red), "Cancel", and "Delete List".

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 -

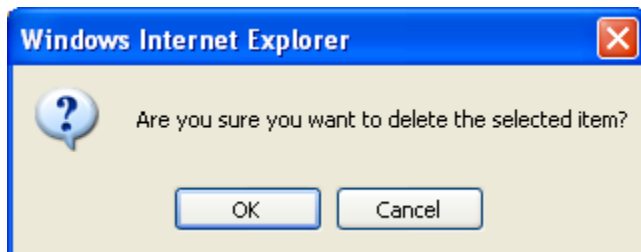
Alternatively, if you have already chosen to View the list, within the List Details section select Delete List.

The screenshot shows the 'Observations DMS' web application interface. The page title is 'List Management' and it includes a 'New List' link. There is a search form with fields for 'List name' and 'List type' (set to 'Any'), and radio buttons for 'Show All' and 'Show Mine'. Below the search form is a table of search results:

List name	List type	Owner
happy valley	Location	Jennifer Nichols (jennifer nichols)
NS users	User	Jennifer Nichols (jennifer nichols)
observers	Person	Jennifer Nichols (jennifer nichols)
rana	Species	Jennifer Nichols (jennifer nichols)
terns	Species	Jennifer Nichols (jennifer nichols)

Below the table is a 'List Details' section for the selected 'happy valley' list, showing its type as 'Location' and owner as 'Jennifer Nichols (jennifer nichols)'. At the bottom of this section are 'Edit List' and 'Delete List' buttons, with the 'Delete List' button circled in red.

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

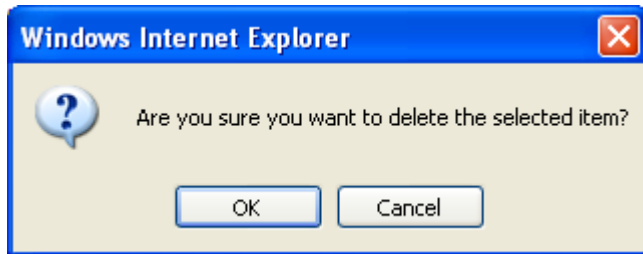


Edit List

- 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.

The screenshot shows the 'List Management' interface. The search results table is as follows:

List name	List type	Owner
happy valley	Location	Jennifer Nichols (jennifer nichols)
	User	Jennifer Nichols (jennifer nichols)
	Person	Jennifer Nichols (jennifer nichols)
	Species	Jennifer Nichols (jennifer nichols)
	Species	Jennifer Nichols (jennifer nichols)

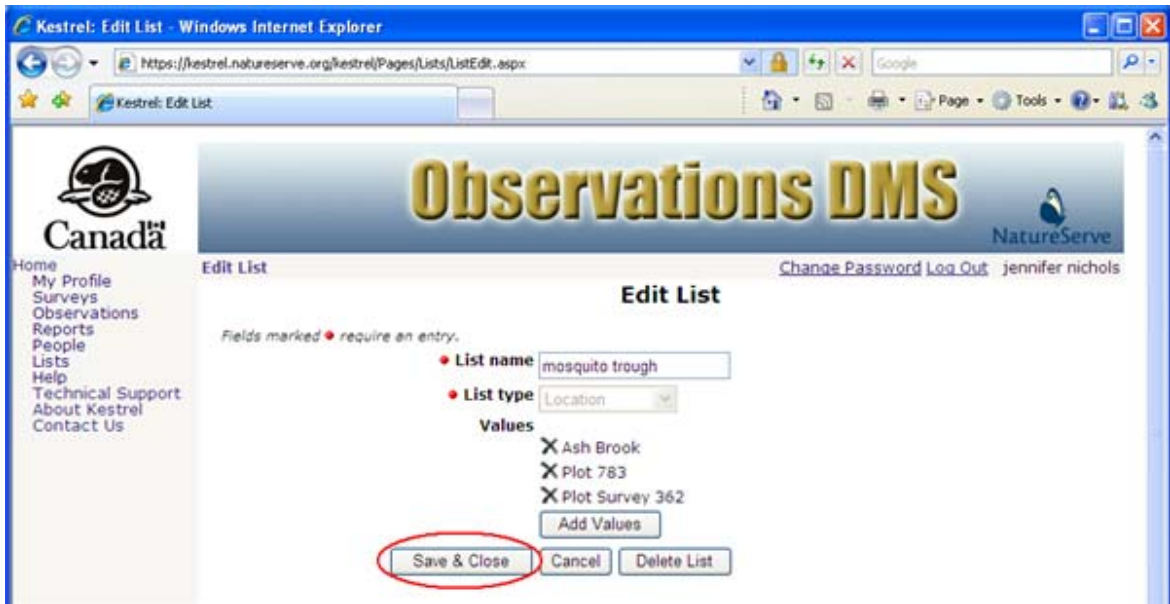
Below the table, the details for the selected list are shown:

List name	happy valley
List type	Location
Owner	Jennifer Nichols (jennifer nichols)
Values	Plot 783 Plot Survey 362

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.

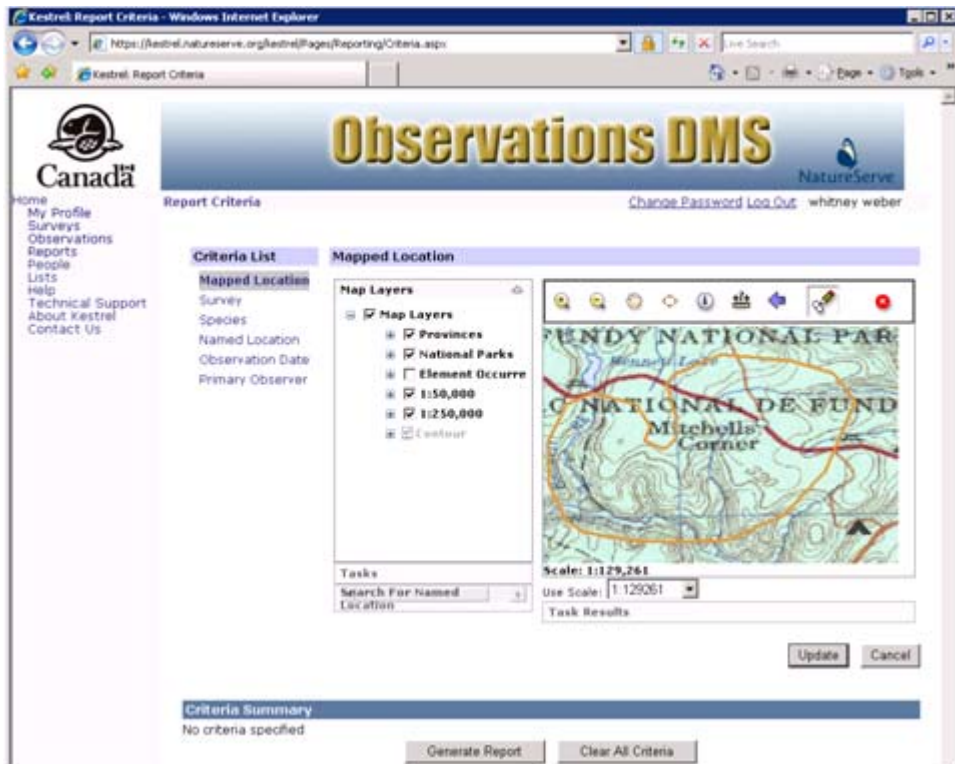
- [Mapped Location](#)
- [Survey](#)
- [Species](#)
- [Named Location](#)
- [Observation Date](#)
- [Primary Observer](#)

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

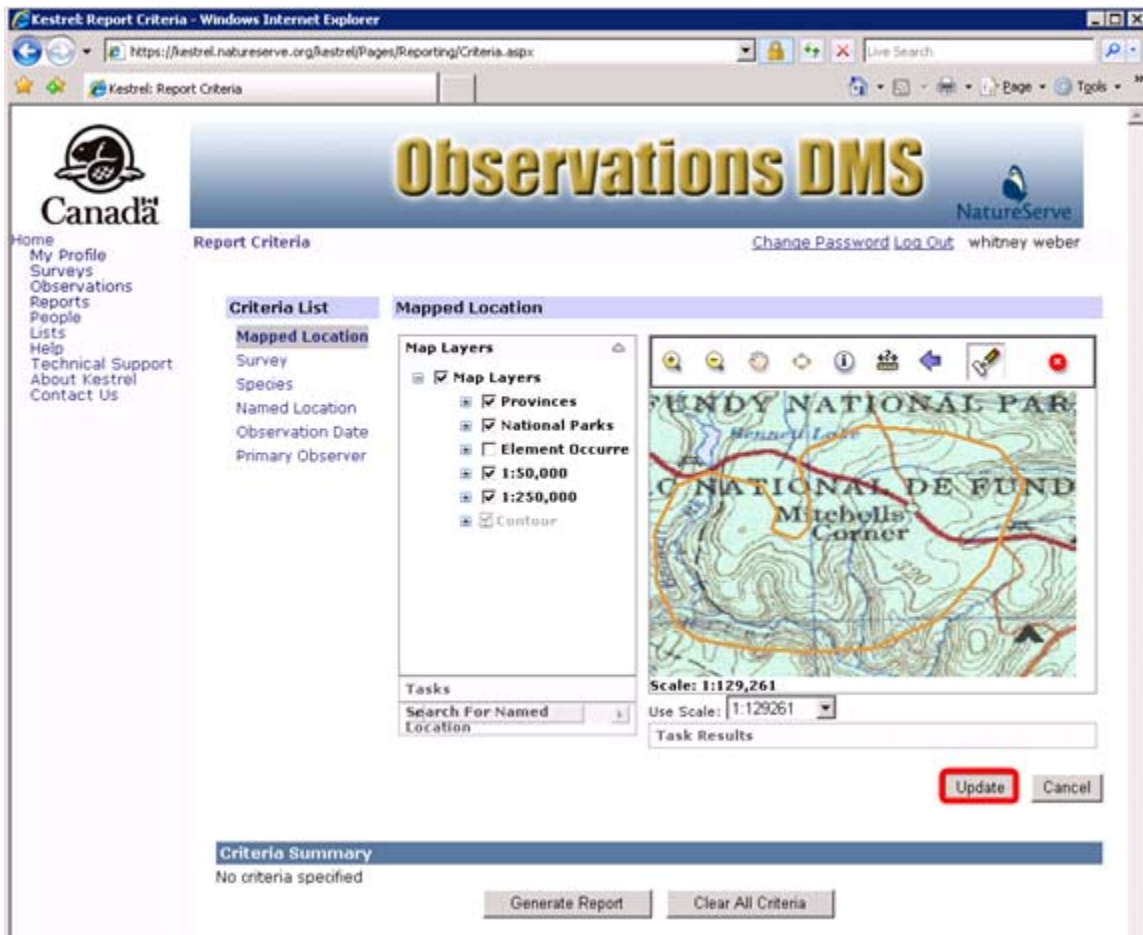
The screenshot shows the 'Observations DMS' web application interface. At the top, there is a navigation menu with 'Home', 'My Profile', 'Surveys', 'Observations', 'Reports', 'People', 'Lists', 'Help', 'Technical Support', 'About Kestrel', and 'Contact Us'. The main header displays 'Observations DMS' and 'NatureServe'. Below the header, the 'Report Criteria' section is active, showing a 'Criteria List' on the left and a 'Mapped Location' map on the right. The 'Criteria List' is a vertical menu with 'Mapped Location' highlighted in a red box. The 'Mapped Location' section includes a 'Map Layers' panel with checkboxes for 'Provinces', 'National Parks', 'Element Occurer', '1:50,000', '1:250,000', and 'Contour'. A map of Canada is displayed with various colored overlays. Below the map, there is a 'Scale' section with a dropdown menu set to '1:1,000' and a 'Task Results' section. At the bottom, there is a 'Criteria Summary' section with the text 'No criteria specified' and two buttons: 'Generate Report' and 'Clear All Criteria'.

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**.

Kestrel Report Criteria - Windows Internet Explorer
https://kestrel.natureserve.org/kestrel/Pages/Reporting/Criteria.aspx
Kestrel: Report Criteria
Change Password Log Out whitney weber

Observations DMS

Report Criteria

Criteria List

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

Mapped Location

Map Layers

- Map Layers
- Provinces
- National Parks
- Element Occurrence
- 1:50,000
- 1:250,000
- Contour

Tasks
Search For Named Location

Scale: 1:263,325
Use Scale: 1:1,000
Task Results

Update Cancel

Criteria Summary

- X Mapped Location (Custom Shape)

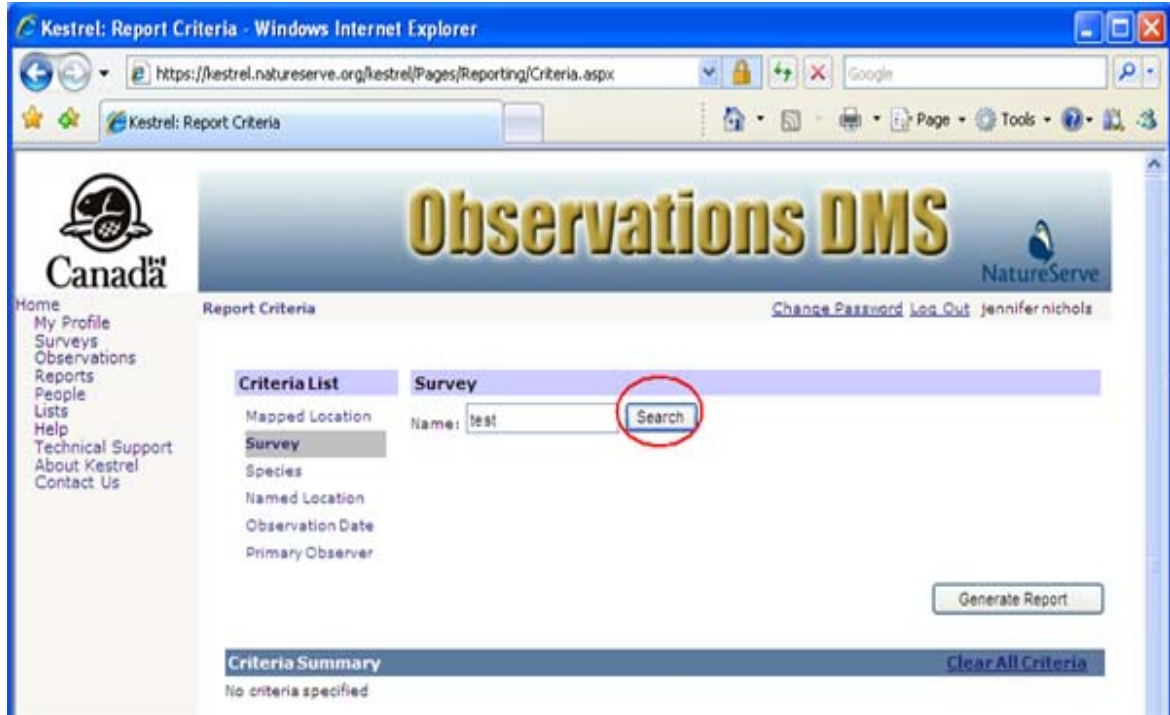
Generate Report Clear All Criteria

Related Tasks:

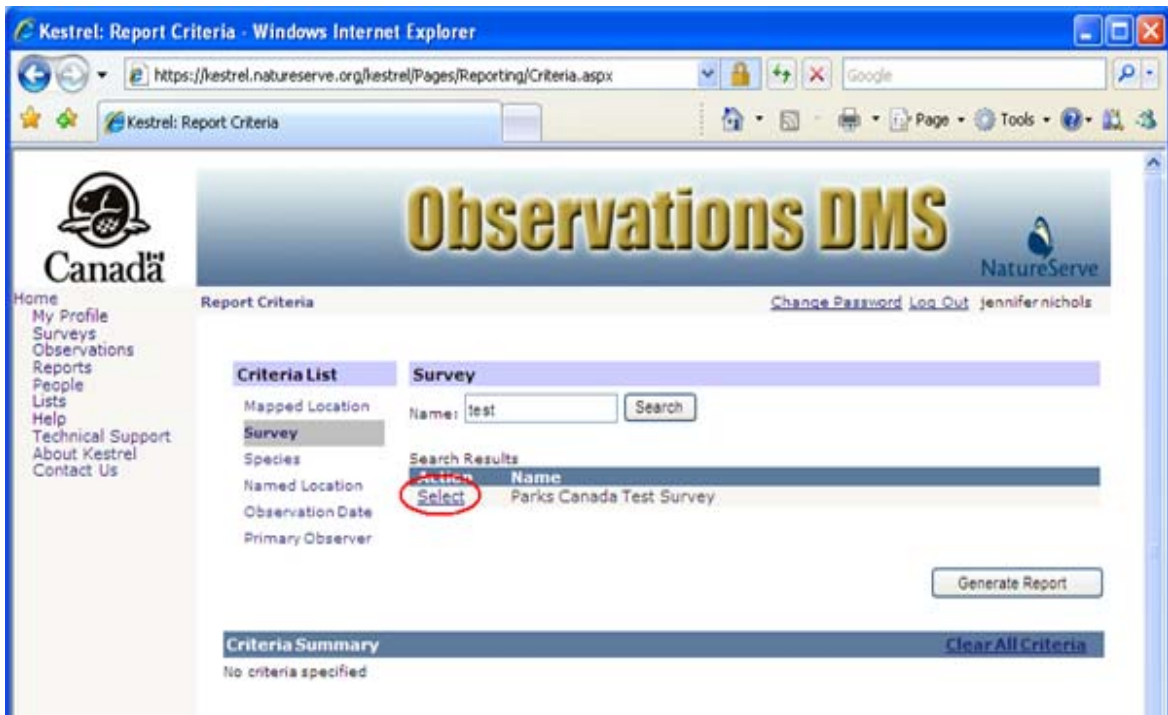
- [Select Tasks](#)
- [Query Builder](#)
- [Clear Criteria](#)
- Define Report Criteria according to
 - [Survey](#)
 - [Species](#)
 - [Named Location](#)
 - [Observation Date](#)
 - [Primary Observer](#)

Survey

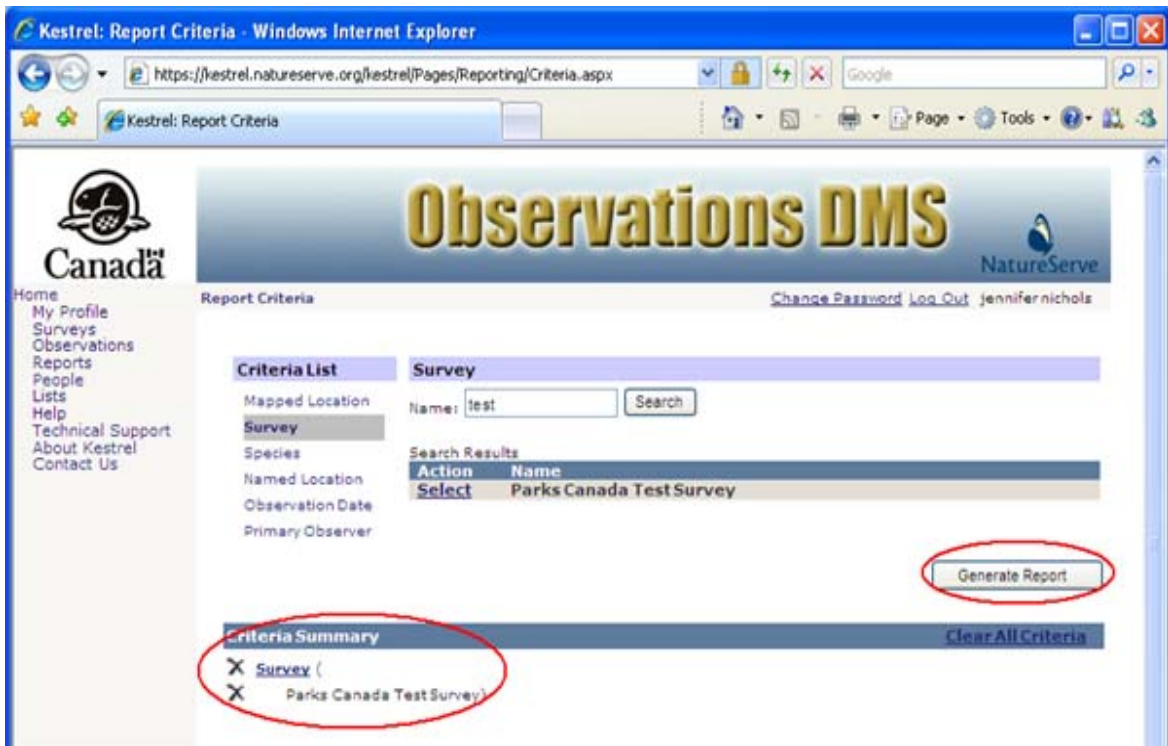
1. Within the *Report Criteria* page, select **Survey** from the Criteria List section.
2. Type in any part of the survey name, and choose **Search**. The more specific the search criteria, the faster the search.



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](#)

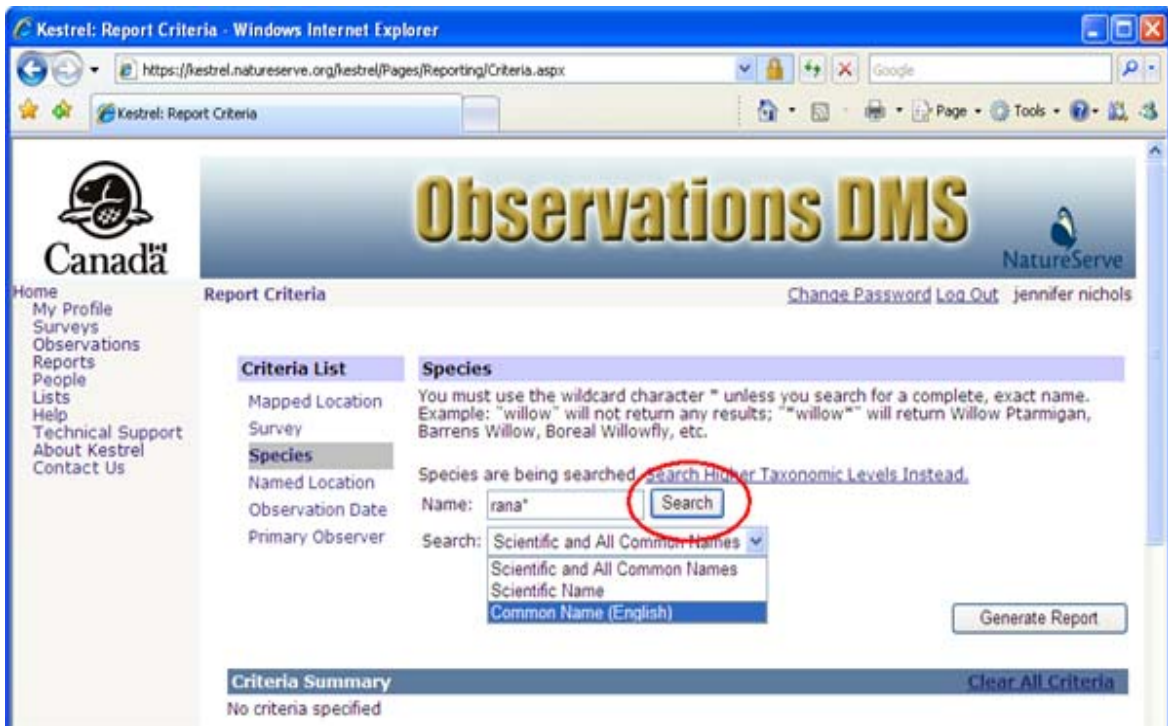
Species

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.

The screenshot shows the 'Observations DMS' web application interface. The browser title is 'Kestrel: Report Criteria - Windows Internet Explorer'. The URL is 'https://kestrel.natureserve.org/kestrel/Pages/Reporting/Criteria.aspx'. The page features a navigation menu on the left with options like 'Home', 'My Profile', 'Surveys', 'Observations', 'Reports', 'People', 'Lists', 'Help', 'Technical Support', 'About Kestrel', and 'Contact Us'. The main content area is titled 'Report Criteria' and includes a 'Criteria List' with options like 'Mapped Location', 'Survey', 'Species', 'Named Location', 'Observation Date', and 'Primary Observer'. The 'Species' section is active, showing search instructions and a search box with 'rana*' entered. Below the search box, a table of search results is displayed, with the 'Select' link for 'Rana aurora' circled in red.

Action	Scientific Name	Common Name
Select	Rana catesbeiana	Bullfrog
Select	Rana luteiventris	Columbia Spotted Frog
Select	Rana clamitans melanota	Green Frog
Select	Rana clamitans	Green Frog
Select	Rana septentrionalis	Mink Frog
Select	Rana pipiens	Northern Leopard Frog
Select	Rana pipiens pop. 3	Northern Leopard Frog - Eastern population
Select	Rana pipiens pop. 1	Northern Leopard Frog - Southern Mountain population
Select	Rana pipiens pop. 2	Northern Leopard Frog - Western Boreal/Prairie populations
Select	Rana pretiosa	Oregon Spotted Frog
Select	Rana palustris	Pickereel Frog
Select	Rana aurora	Red-legged Frog
Select	Rana sylvatica	Wood Frog

- 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**.

The screenshot shows the 'Observations DMS' web application interface. At the top, there is a navigation menu with 'Home', 'My Profile', 'Surveys', 'Observations', 'Reports', 'People', 'Lists', 'Help', 'Technical Support', 'About Kestrel', and 'Contact Us'. The main content area is titled 'Observations DMS' and includes a 'Report Criteria' section. Under 'Criteria List', the 'Species' tab is selected. The search criteria include 'Mapped Location', 'Survey', 'Named Location', 'Observation Date', and 'Primary Observer'. The search results table lists various frog species with their scientific and common names. A 'Generate Report' button is circled in red. Below the search results, a 'Criteria Summary' section is also circled in red, showing 'Species (X Rana aurora (Red-legged Frog))'.

Criteria List

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

Species

You must use the wildcard character "*" unless you search for a complete, exact name. Example: "willow" will not return any results; "willow*" will return Willow Ptarmigan, Barrens Willow, Boreal Willowfly, etc.

Species are being searched. [Search Higher Taxonomic Levels Instead.](#)

Name:

Search:

Search Results

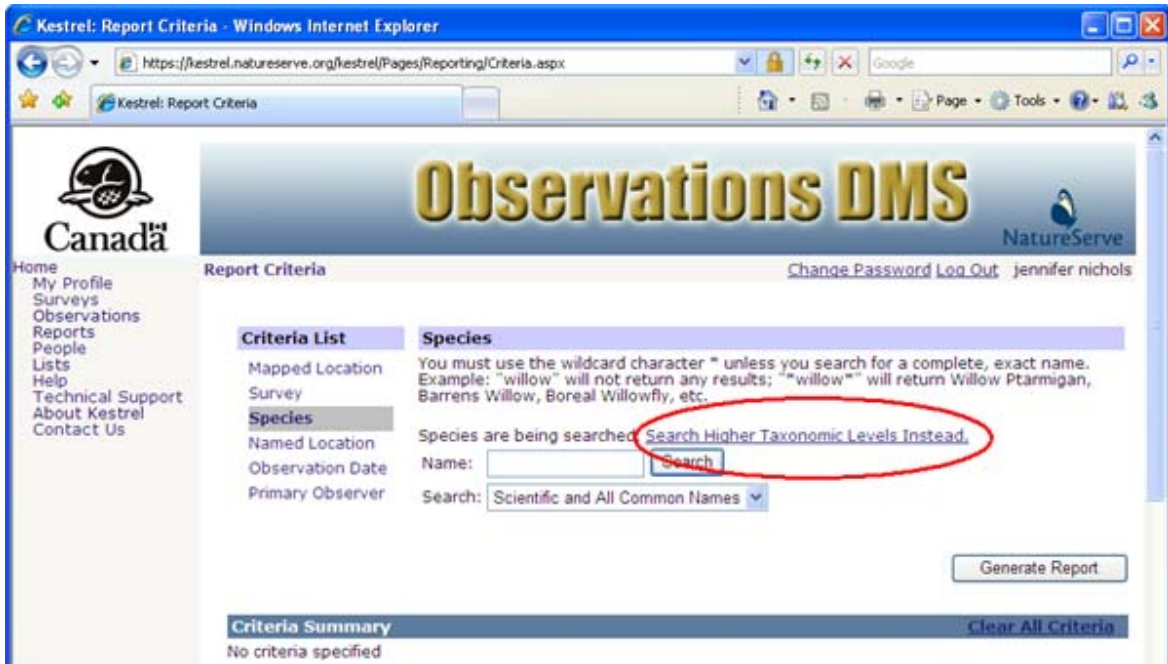
Action	Scientific Name	Common Name
Select	Rana catesbeiana	Bullfrog
Select	Rana luteiventris	Columbia Spotted Frog
Select	Rana clamitans melanota	Green Frog
Select	Rana clamitans	Green Frog
Select	Rana septentrionalis	Mink Frog
Select	Rana pipiens	Northern Leopard Frog
Select	Rana pipiens pop. 3	Northern Leopard Frog - Eastern population
Select	Rana pipiens pop. 1	Northern Leopard Frog - Southern Mountain population
Select	Rana pipiens pop. 2	Northern Leopard Frog - Western Boreal/Prairie populations
Select	Rana pretiosa	Oregon Spotted Frog
Select	Rana palustris	Pickerel Frog
Select	Rana aurora	Red-legged Frog
Select	Rana sylvatica	Wood Frog

Criteria Summary

- X Species (
- X Rana aurora (Red-legged Frog)

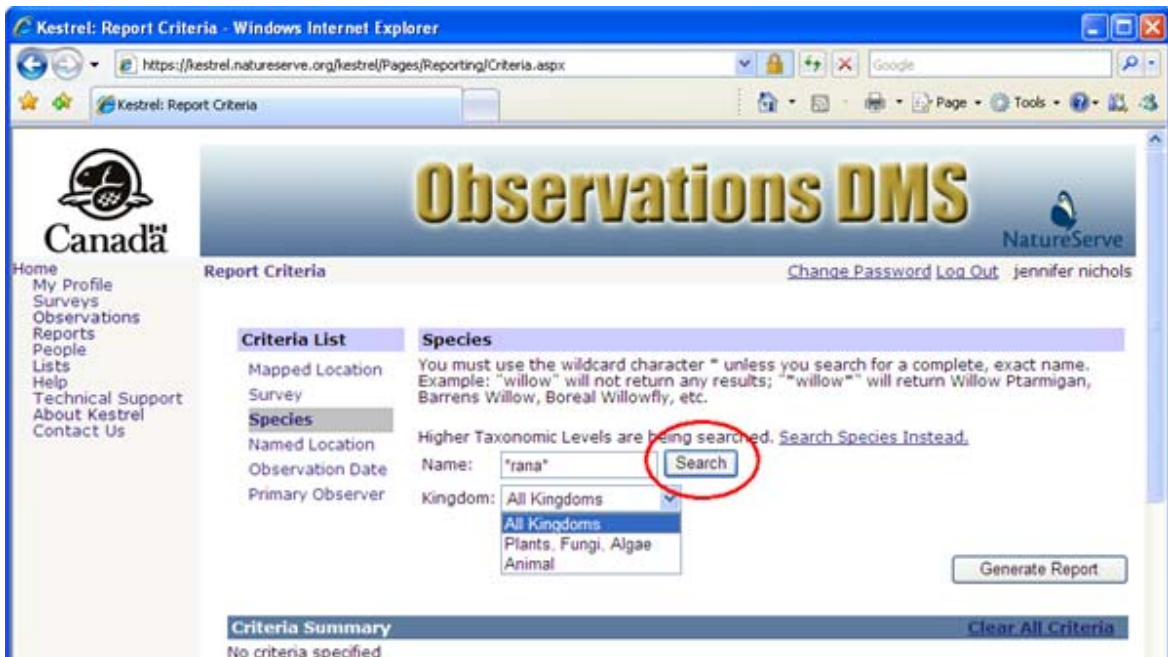
Use higher taxonomic levels

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.

The screenshot shows the 'Observations DMS' web application interface. The browser window title is 'Kestrel: Report Criteria - Windows Internet Explorer'. The URL is 'https://kestrel.natureserve.org/kestrel/Pages/Reporting/Criteria.aspx'. The page features the 'Canada' logo on the left and the 'Observations DMS' title in large yellow letters at the top. Below the title, there are navigation links for 'Home', 'My Profile', 'Surveys', 'Observations', 'Reports', 'People', 'Lists', 'Help', 'Technical Support', 'About Kestrel', and 'Contact Us'. The main content area is titled 'Report Criteria' and includes a 'Criteria List' on the left and a 'Species' search section on the right. The 'Species' section contains a search form with a 'Name' field containing 'rana', a 'Search' button, and a 'Kingdom' dropdown menu set to 'All Kingdoms'. Below the search form, a 'Search Results' table is displayed with columns for 'Action', 'Scientific Name', and 'Common Name'. The table lists various species, including 'Rana', which is highlighted with a red circle around its 'Select' link. The table also includes a 'Common Name' column with 'no common name' for all entries and a yellow warning icon in the final column. The page footer shows '1 2' indicating pagination.

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**.

Observations DMS

Report Criteria [Change Password](#) [Log Out](#) Jennifer nichols

Criteria List

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

Species

You must use the wildcard character * unless you search for a complete, exact name. Example: "willow" will not return any results; "willow*" will return Willow Ptarmigan, Barrens Willow, Boreal Willowfly, etc.

Higher Taxonomic Levels are being searched. [Search Species Instead.](#)

Name:

Kingdom:

Search Results

Action	Scientific Name	Common Name
Select	Amburana	no common name
Select	Dicranaceae	no common name
Select	Dicranales	no common name
Select	Fletcherana	no common name
Select	Granatellus	no common name
Select	Metaporana	no common name
Select	Millegrana	no common name
Select	Phaedranassa	no common name
Select	Porana	no common name
Select	Provancherana	no common name
Select	Rana	no common name
Select	Ranalisma	no common name
Select	Ranatra	no common name
Select	Rapubarana	no common name
Select	Rupirana	no common name

1 2

Criteria Summary [Clear All Criteria](#)

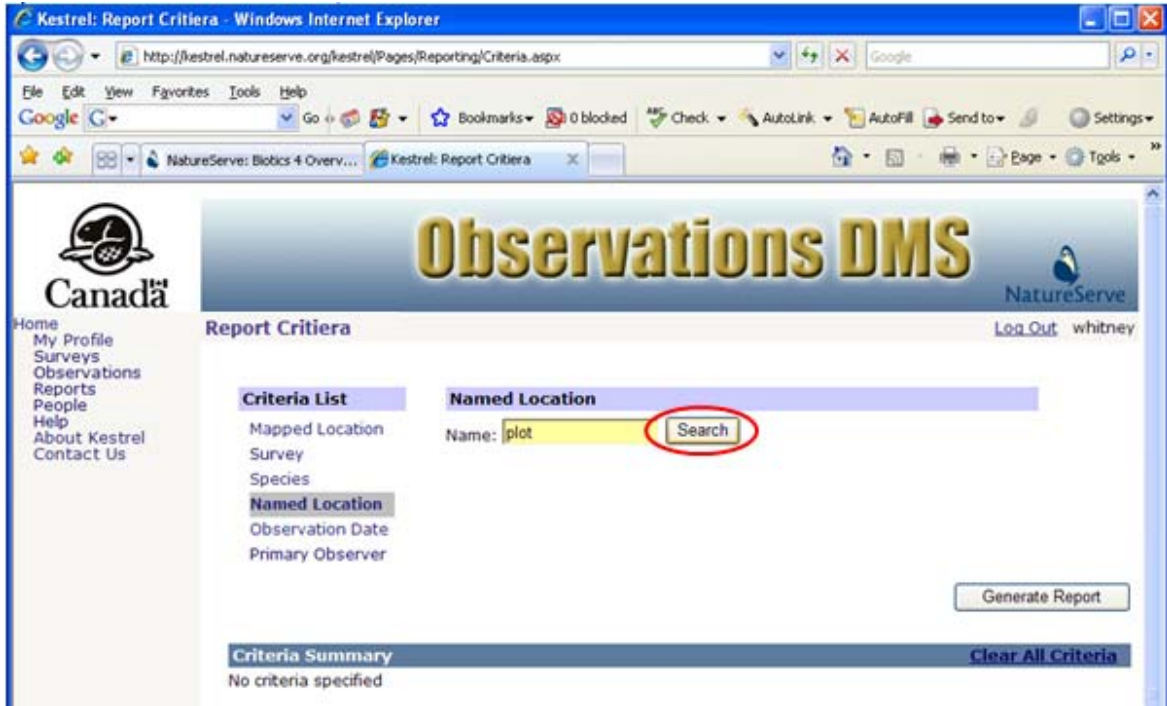
- X Species (
- X Ranatra(no common name))

Related Tasks:

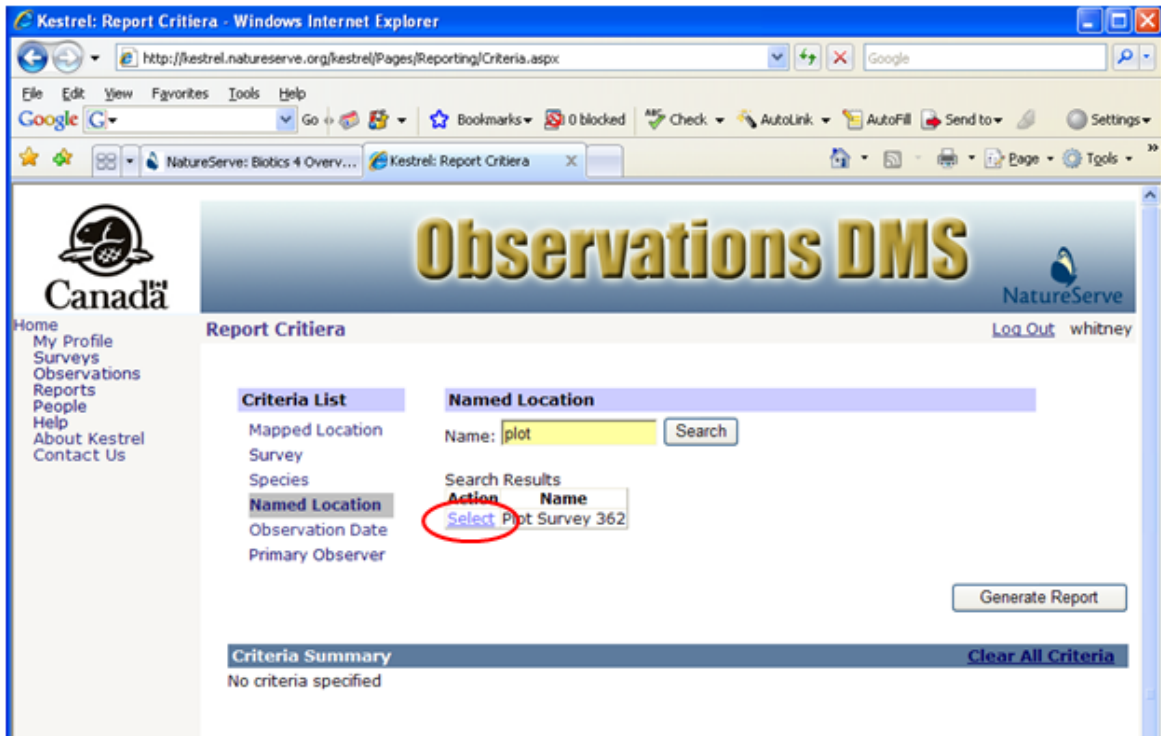
- [Clear Criteria](#)
- Define Report Criteria according to
 - [Mapped Location](#)
 - [Survey](#)
 - [Named Location](#)
 - [Observation Date](#)
 - [Primary Observer](#)

Named Location

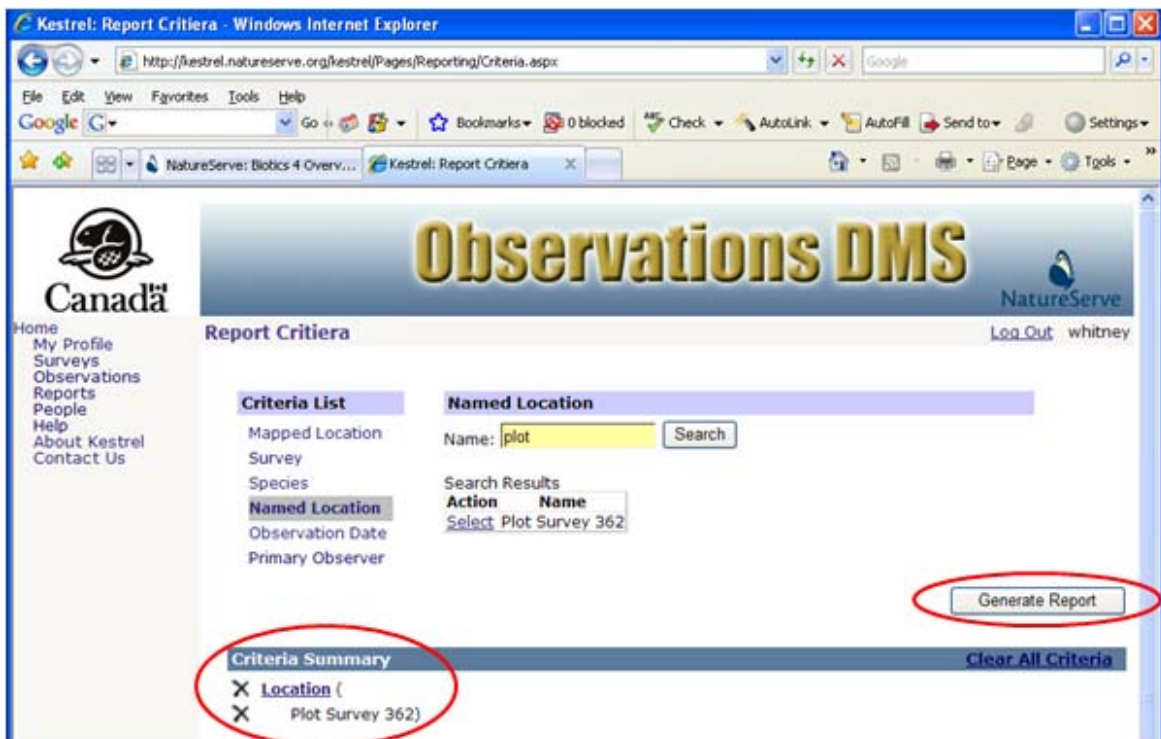
1. Within the *Report Criteria* page, select **Named Location** from the Criteria List section.
2. Type in any part of the named location, and choose **Search**. The more specific the search criteria, the faster the search.



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**.

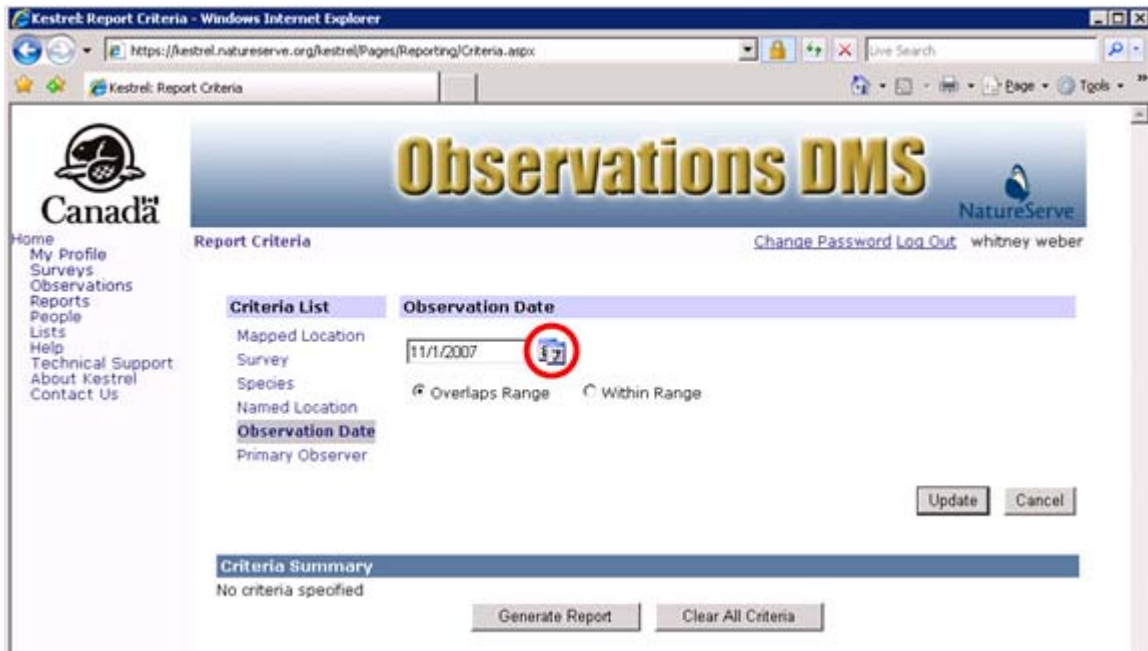




Related Tasks:

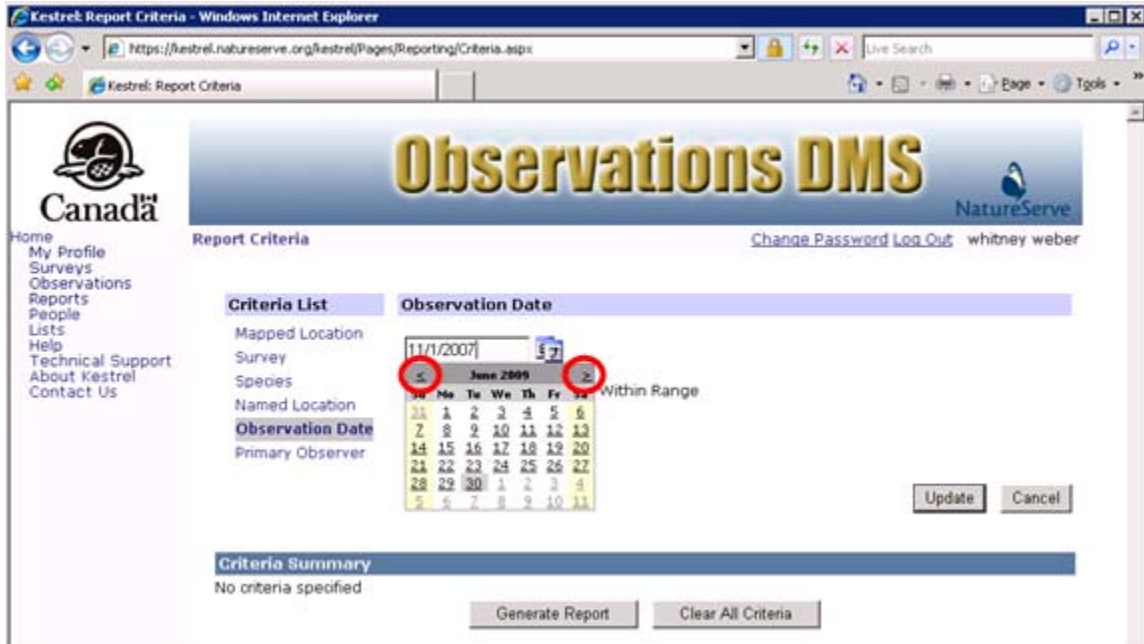
- [Clear Criteria](#)
- Define Report Criteria according to
 - [Mapped Location](#)
 - [Survey](#)
 - [Species](#)
 - [Observation Date](#)
 - [Primary Observer](#)

Observation Date

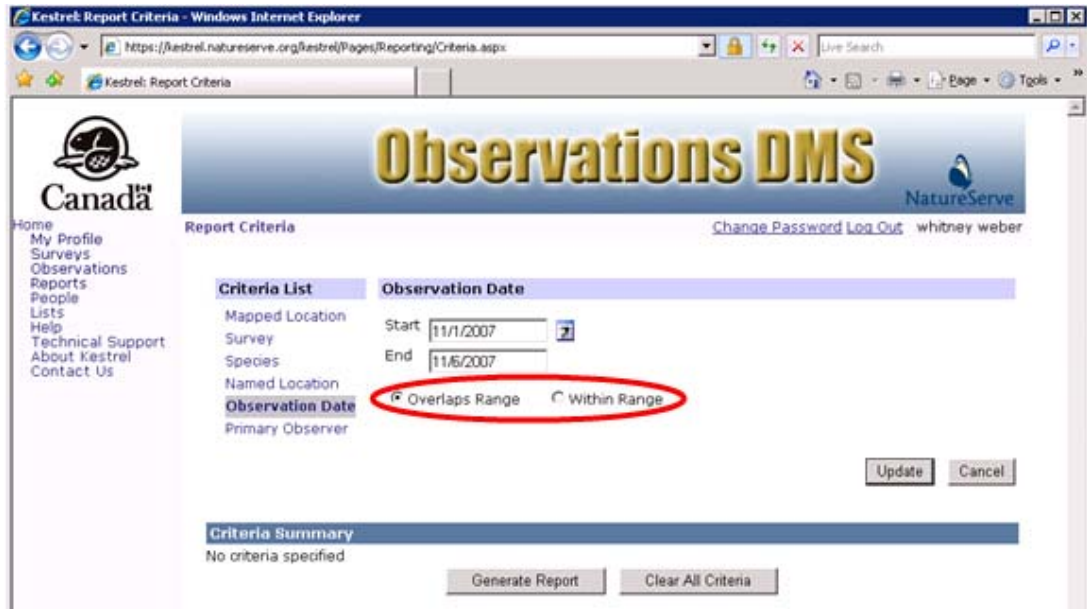
1. Within the *Report Criteria* page, select **Observation Date** from the Criteria List section.
2. The observation date criteria can be defined by a single date or a date range. To indicate a date range, click the  icon, which will allow you to specify the start and end date of the date range. To return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



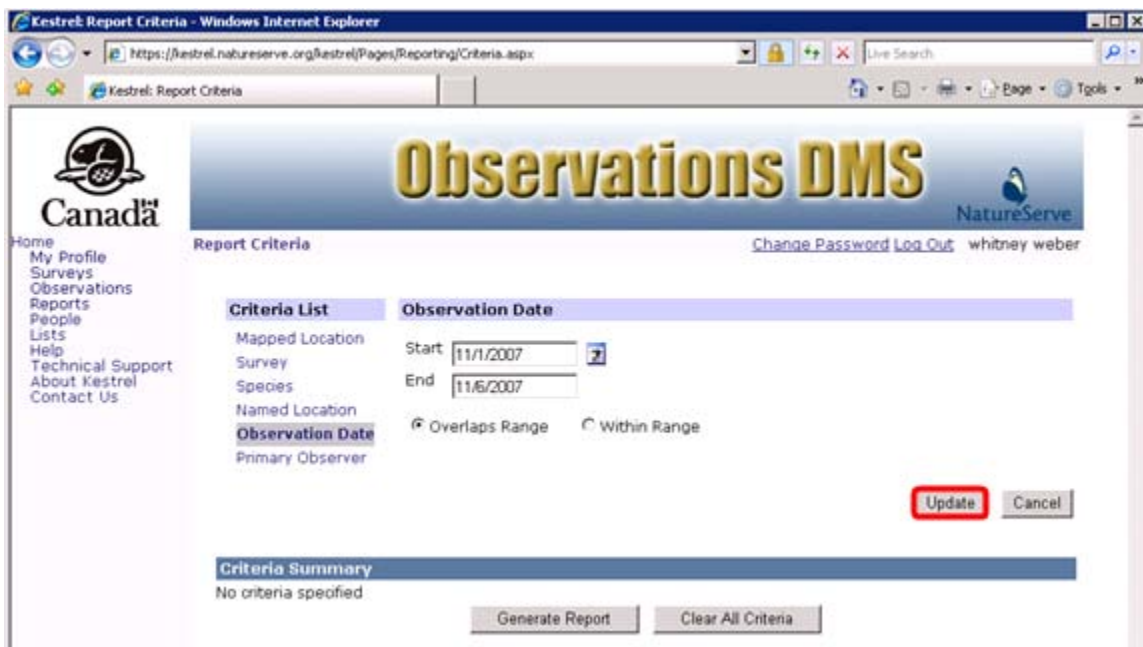
3. Click within the date textbox to either manually enter the desired date or to select the date from the calendar that appears when the field is clicked. Both the textbox and the calendar initialize to the current date. Click the  icon on the calendar to navigate to the previous month or the  icon to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



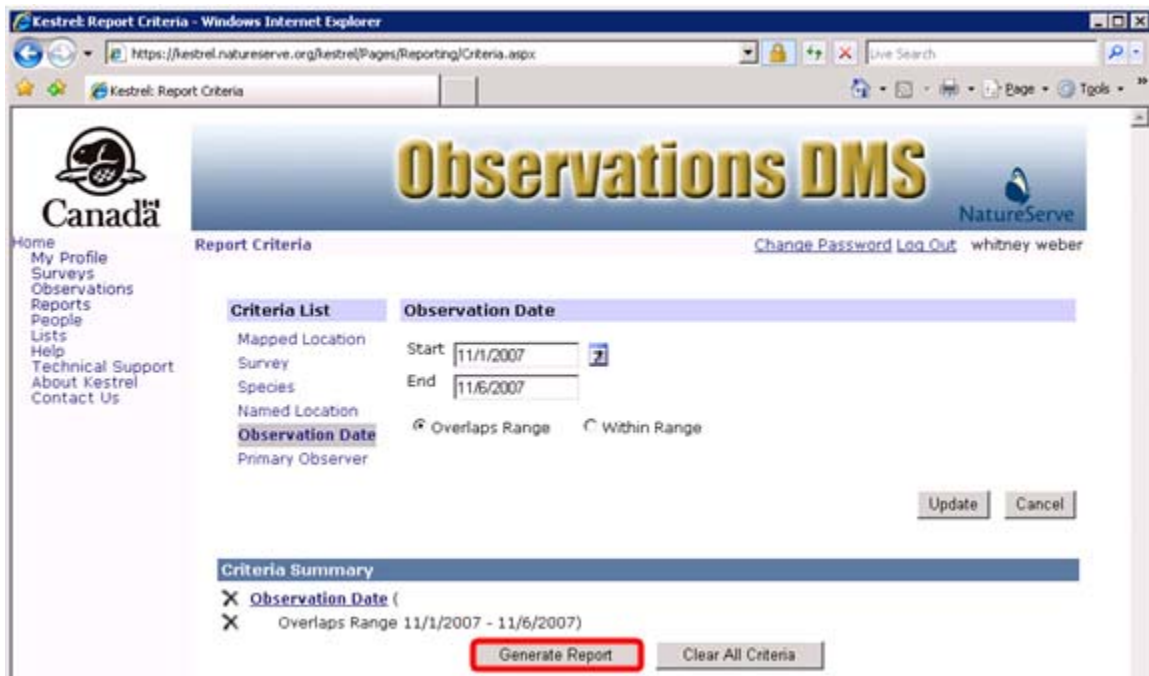
4. If you have entered a date range, use the radio buttons to indicate whether you want your search to return results in which the observation date range **Overlaps** the **Range** or is **Within** the **Range** of the dates specified.
 - **Overlaps Range:** if the dates specified within the search criteria 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 – 5).



5. After defining the observation date(s) and search type, click **Update** to add the observation date as a search criteria 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**.

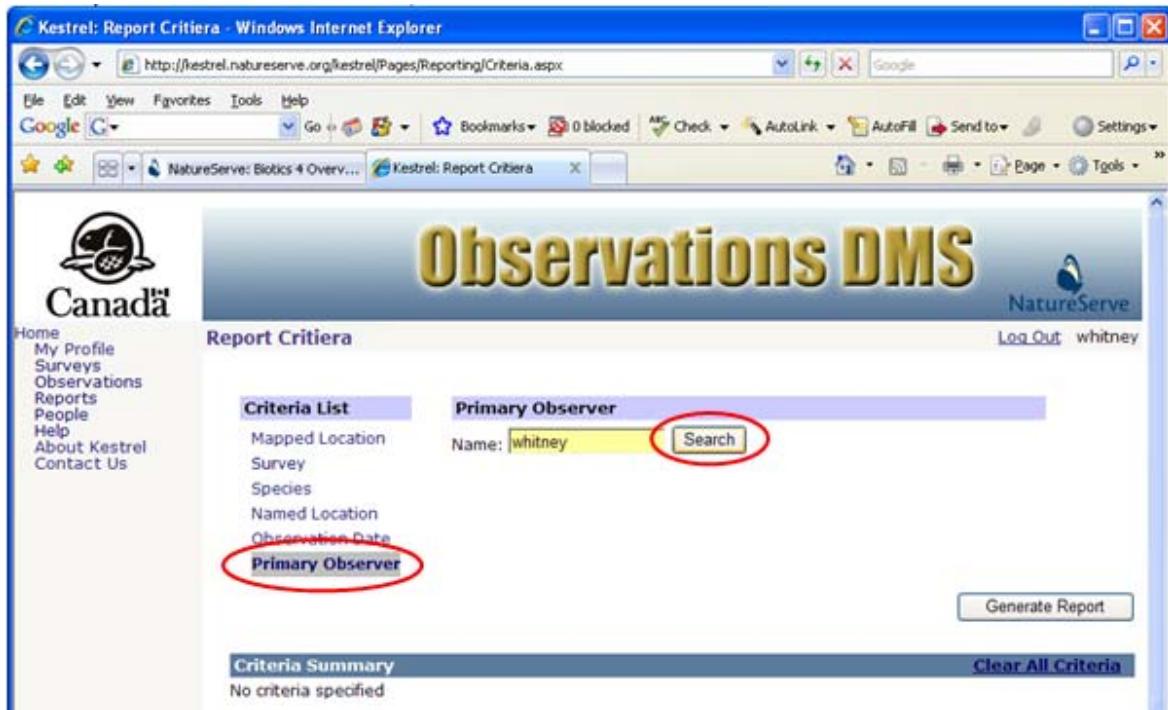


Related Tasks:

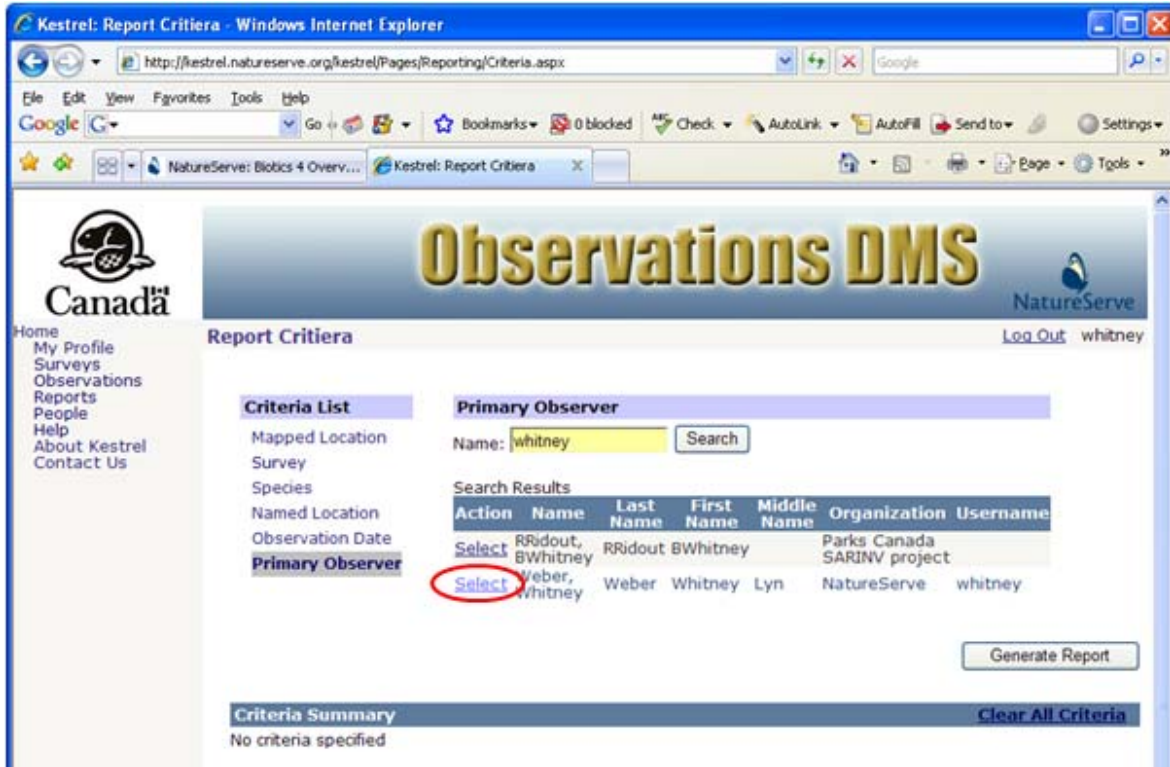
- [Clear Criteria](#)
- Define Report Criteria according to
 - [Mapped Location](#)
 - [Species](#)
 - [Survey](#)
 - [Named Location](#)
 - [Primary Observer](#)

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**.

The screenshot shows the 'Observations DMS' web application. The browser title is 'Kestrel: Report Criteria - Windows Internet Explorer'. The URL is 'http://kestrel.natureserve.org/kestrel/Pages/Reporting/Criteria.aspx'. The page features a navigation menu on the left with links like 'Home', 'My Profile', 'Surveys', 'Observations', 'Reports', 'People', 'Help', 'About Kestrel', and 'Contact Us'. The main content area is titled 'Report Criteria' and includes a 'Criteria List' with options like 'Mapped Location', 'Survey', 'Species', 'Named Location', and 'Observation Date'. The 'Primary Observer' section has a search bar with 'whitney' entered and a 'Search' button. Below this is a 'Search Results' table:

Action	Name	Last Name	First Name	Middle Name	Organization	Username
Select	RRidout, BWhitney	RRidout	BWhitney		Parks Canada SARINV project	
Select	Weber, Whitney	Weber	Whitney	Lyn	NatureServe	whitney

At the bottom of the page, there is a 'Criteria Summary' section with a red circle around it, showing:

- X Primary Observer (
- X Weber, Whitney)

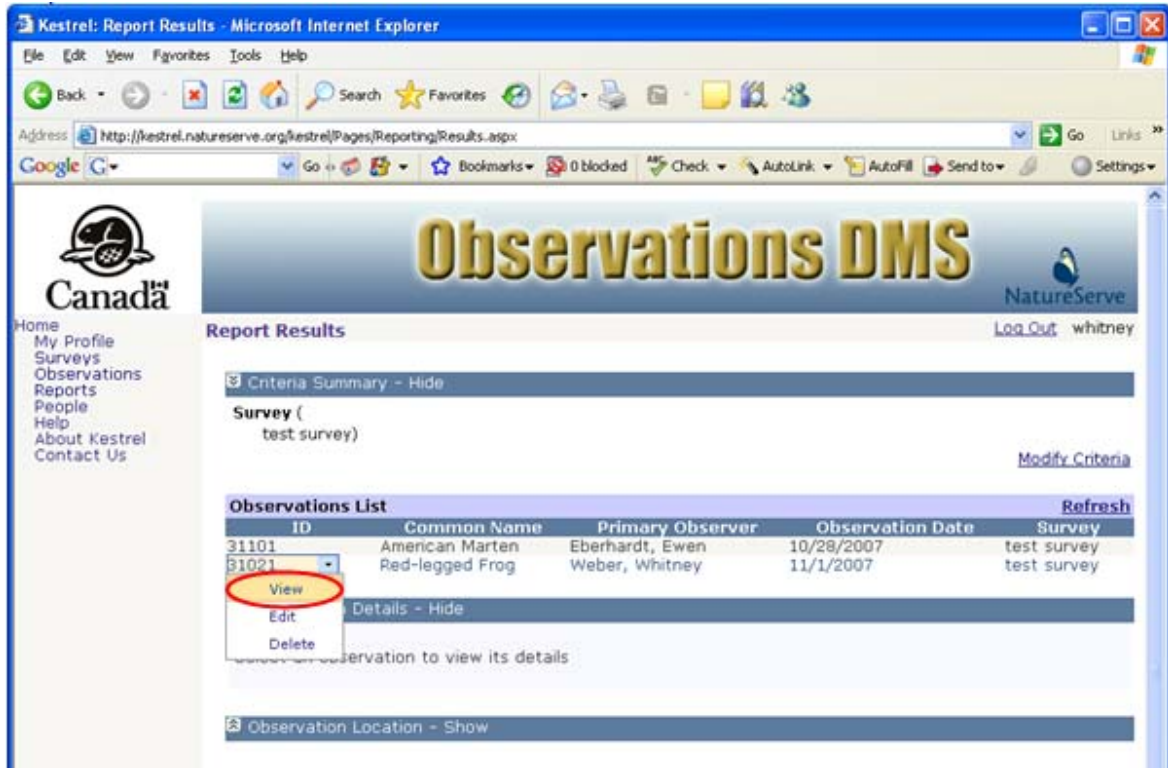
Other elements include a 'Generate Report' button (circled in red), a 'Clear All Criteria' button, and a 'Log Out whitney' link.

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](#).

Observations DMS

Report Results

Criteria Summary - Hide

Survey (test survey) [Modify Criteria](#)



ID	Common Name	Primary Observer	Observation Date	Survey
31102	Northern Flying Squirrel	Weber, Whitney	9/4/2007 - 9/13/2007	test survey
31101	American Marten	Eberhardt, Ewen	10/28/2007	test survey
31021	Red-legged Frog	Weber, Whitney	11/1/2007	test survey

Observation Details - Hide

ID: 31021
 Survey: [test survey](#)
 Species: [Red-legged Frog \(Rana aurora\)](#)
 Observation Date: 11/1/2007
 Location: (61.387863, -117.7054878)
 Primary Observer: [Weber, Whitney](#)
 Sensitive:
 Directions:
 Template: NatureServe Observation Standard (http://services.natureserve.org/observations)


Comments - Show

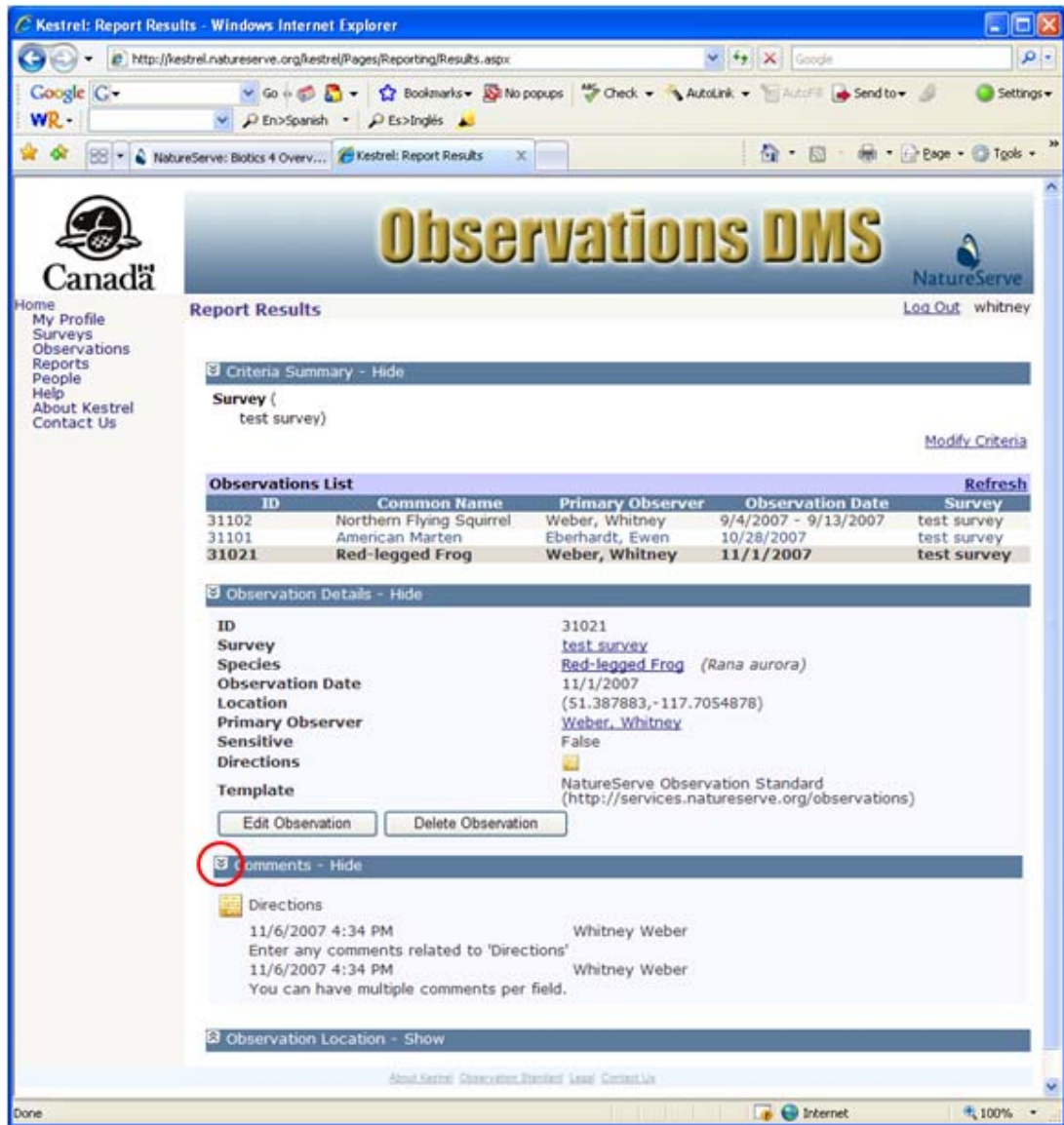
Observation Location - Show

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

The screenshot shows the 'Observations DMS' web application. The browser title is 'Kestrel: Report Results - Windows Internet Explorer'. The URL is 'http://kestrel.natureserve.org/kestrel/Pages/Reporting/Results.aspx'. The page features the Canada logo and a navigation menu on the left. The main content area is titled 'Report Results' and includes a 'Criteria Summary - Hide' section, a 'Survey (test survey)' section, and an 'Observations List' table. The table has columns for ID, Common Name, Primary Observer, Observation Date, and Survey. The third row is highlighted in yellow and shows ID 31021, Common Name 'Red-legged Frog', Primary Observer 'Weber, Whitney', and Observation Date '11/1/2007'. Below the table is an 'Observation Details - Hide' section with fields for ID, Survey, Species, Observation Date, Location, Primary Observer, Sensitive, Directions, and Template. The 'Directions' field contains a red circle icon. At the bottom of the details section are 'Edit Observation' and 'Delete Observation' buttons. Below the details is a 'Comments - Show' section, also highlighted with a red circle, and an 'Observation Location - Show' section.

ID	Common Name	Primary Observer	Observation Date	Survey
31102	Northern Flying Squirrel	Weber, Whitney	9/4/2007 - 9/13/2007	test survey
31101	American Marten	Eberhardt, Ewen	10/28/2007	test survey
31021	Red-legged Frog	Weber, Whitney	11/1/2007	test survey

- 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.

Observations DMS

Report Results Log Out whitney

Criteria Summary - Hide

Survey (test survey) [Modify Criteria](#)

ID	Common Name	Primary Observer	Observation Date	Survey
31102	Northern Flying Squirrel	Weber, Whitney	9/4/2007 - 9/13/2007	test survey
31101	American Marten	Eberhardt, Ewen	10/28/2007	test survey
31021	Red-legged Frog	Weber, Whitney	11/1/2007	test survey

Observation Details - Hide

ID: 31021
 Survey: [test survey](#)
 Species: [Red-legged Frog](#) (*Rana aurora*)
 Observation Date: 11/1/2007
 Location: (51.387883, -117.7054878)
 Primary Observer: [Weber, Whitney](#)
 Sensitive: False
 Directions:
 Template: NatureServe Observation Standard (<http://services.natureserve.org/observations>)

Comments - Show

Observation Location - Hide

Map Layers

- Map Layers
- Canada
- Parks
- 50k
- 250k
- canadacontour

Scale: 1:295,056

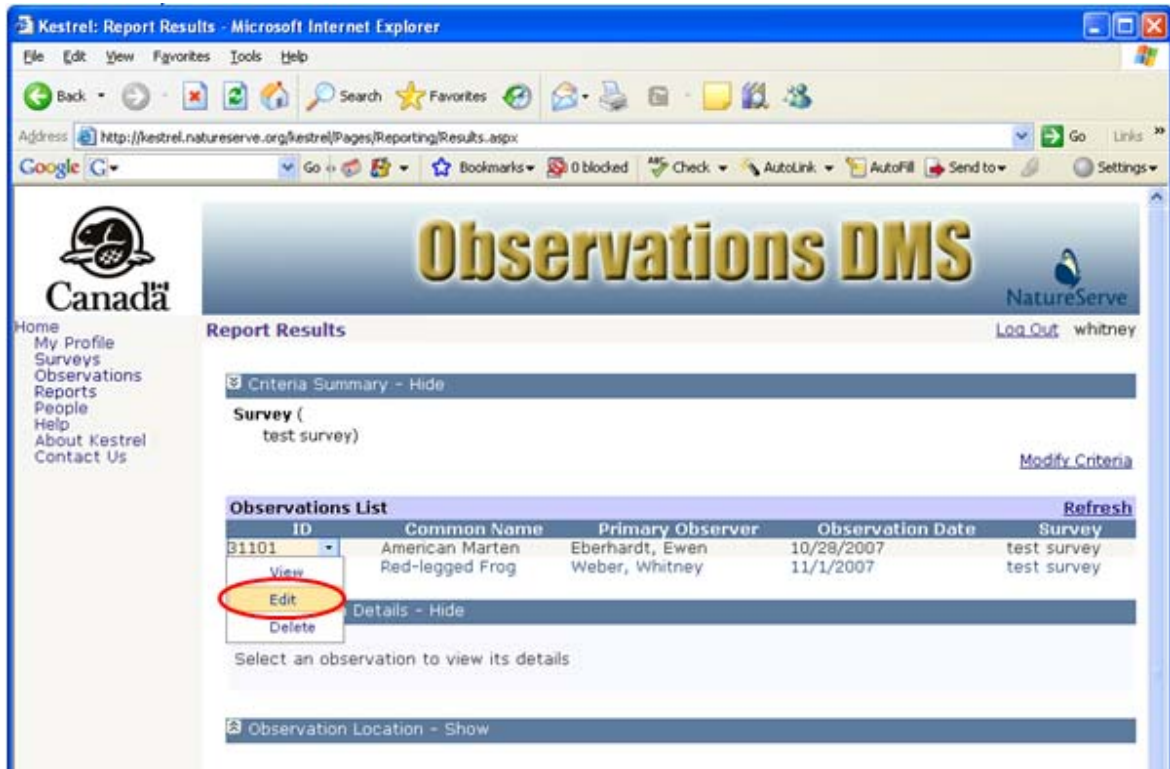
NOTE: See [Mapping Tools](#) for more information regarding using the tools associated with the mapping application.

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**.

Observations DMS

Report Results

Criteria Summary - Hide

Survey (test survey) [Modify Criteria](#)

ID	Common Name	Primary Observer	Observation Date	Survey
31102	Northern Flying Squirrel	Weber, Whitney	9/4/2007 - 9/13/2007	test survey
31101	American Marten	Eberhardt, Ewen	10/28/2007	test survey
31021	Red-legged Frog	Weber, Whitney	11/1/2007	test survey

Observation Details - Hide

ID: 31101
 Survey: [test survey](#)
 Species: [American Marten](#) (*Martes americana*)
 Observation Date: 10/28/2007
 Location: Mount Tupper Lake
 Primary Observer: [Eberhardt, Ewen](#)
 Sensitive: True
 Identification Source:
 Location Confidence: >6.25 - 25 m
 GPS Mode: 3D WAAS
 Evidence Type: photograph
 Template: NatureServe Observation Standard (<http://services.natureserve.org/observations>)

[Edit Observation](#) [Delete Observation](#)

Comments - Show

Observation Location - Show

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.

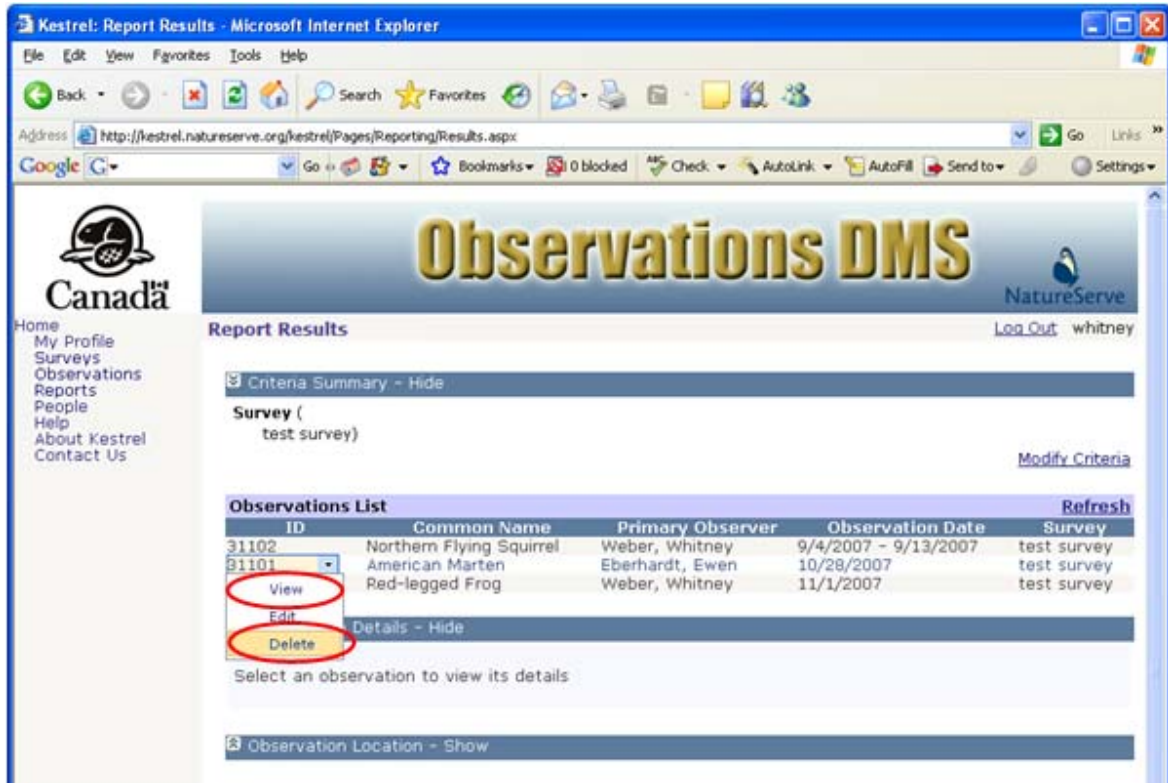


Related Tasks:

- [Select a Species](#)
- [Create New Location](#)
- [Edit Location](#)
- [Select Primary Observer](#)

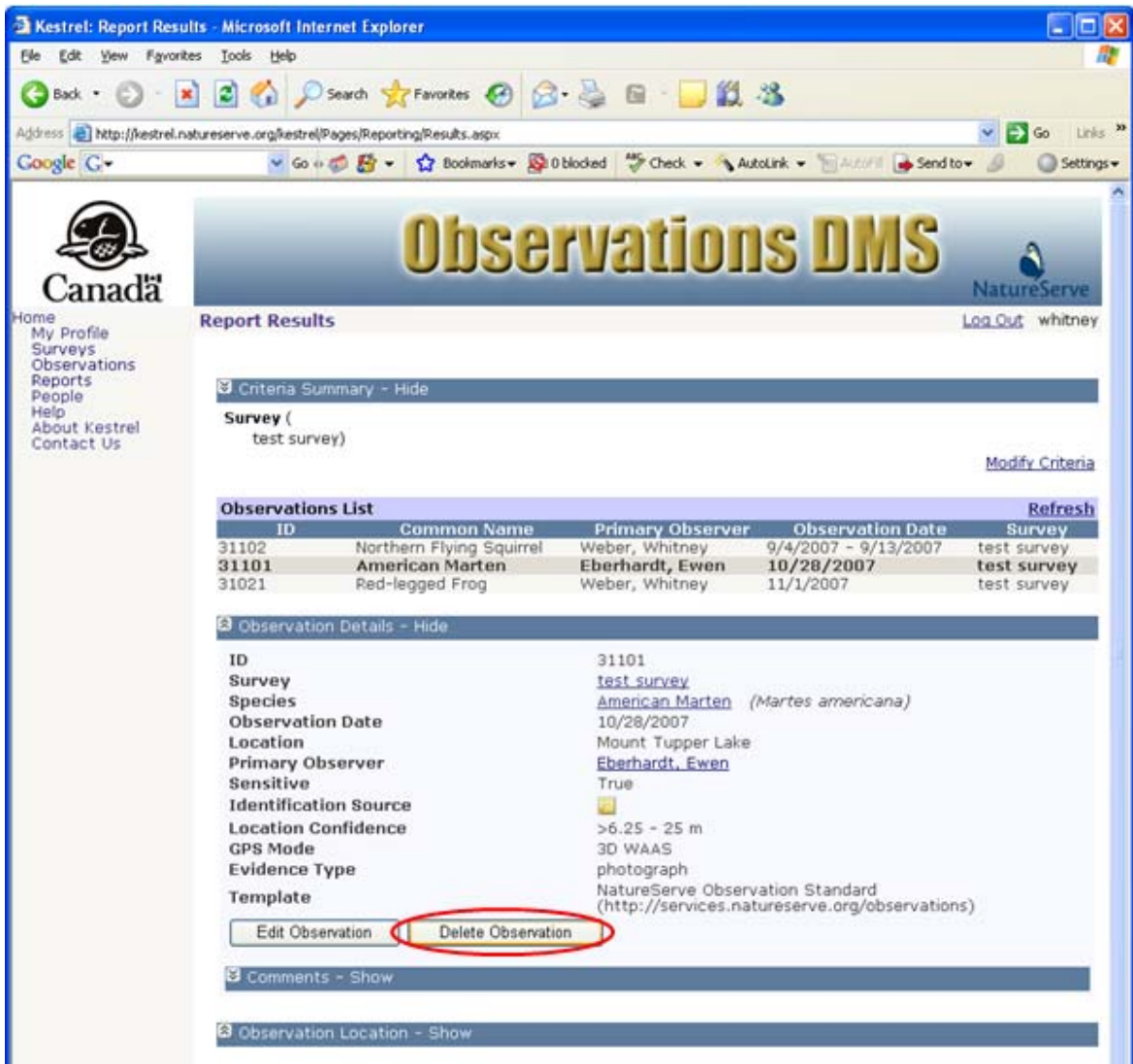
Delete Observation

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.

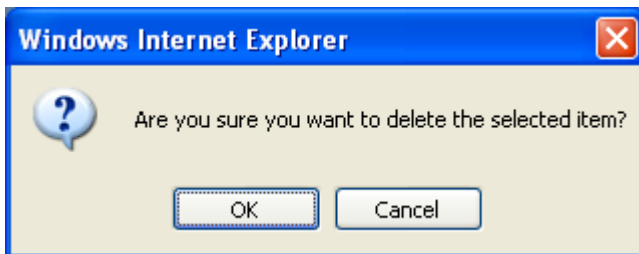


- OR -

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**.



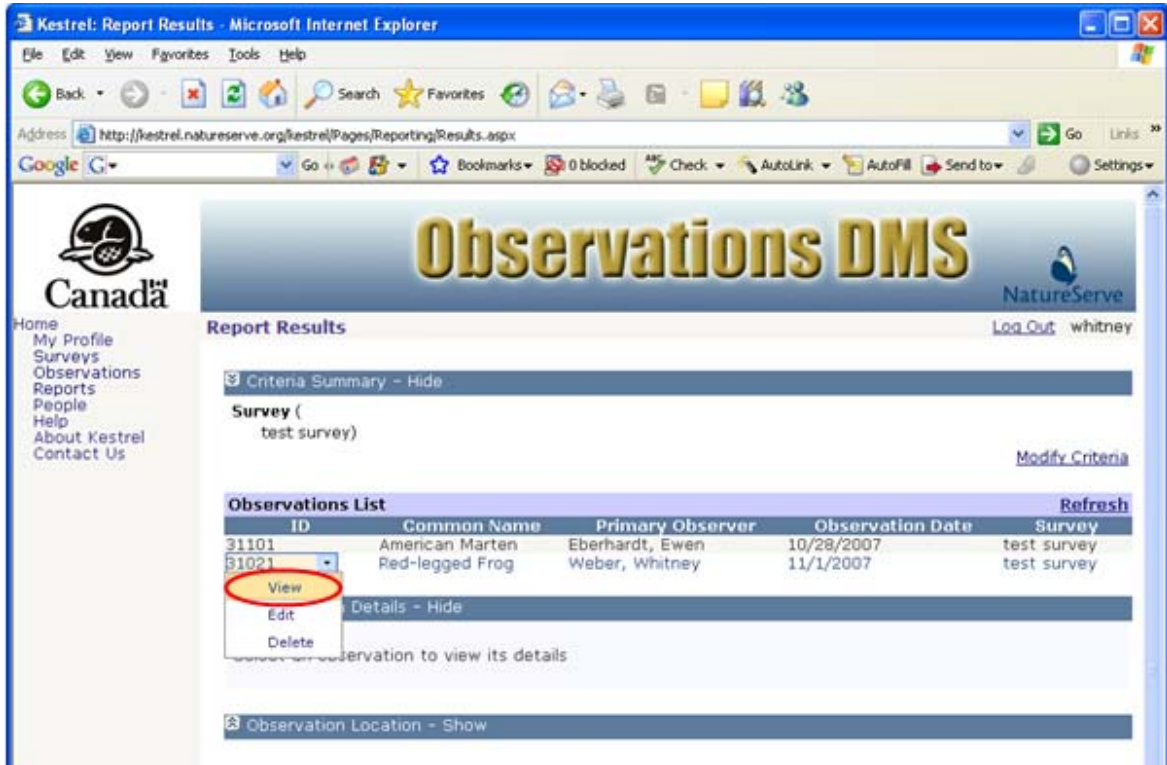
Related Tasks:

- [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.

Observations DMS

Report Results

Criteria Summary - Hide

Survey (test survey) [Modify Criteria](#)

ID	Common Name	Primary Observer	Observation Date	Survey
31102	Northern Flying Squirrel	Weber, Whitney	9/4/2007 - 9/13/2007	test survey
31101	American Marten	Eberhardt, Ewen	10/28/2007	test survey
31021	Red-legged Frog	Weber, Whitney	11/1/2007	test survey

Observation Details - Hide

ID: 31021
 Survey: [test survey](#)
 Species: [Red-legged Frog](#) (*Rana aurora*)
 Observation Date: 11/1/2007
 Location: (51.387883,-117.7054878)
 Primary Observer: [Weber, Whitney](#)
 Sensitive: False
 Directions:
 Template: NatureServe Observation Standard (<http://services.natureserve.org/observations>)

Comments - Show

Observation Location - Show

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](#).

Observations DMS

Survey Details

Survey Name: test survey
 Survey Owner: [Weber, Whitney](#)
 Observation Template: NatureServe Observation Standard (<http://services.natureserve.org/observations>)

Related Tasks:

- [Edit Survey](#)
- [Delete Survey](#)

Edit Survey

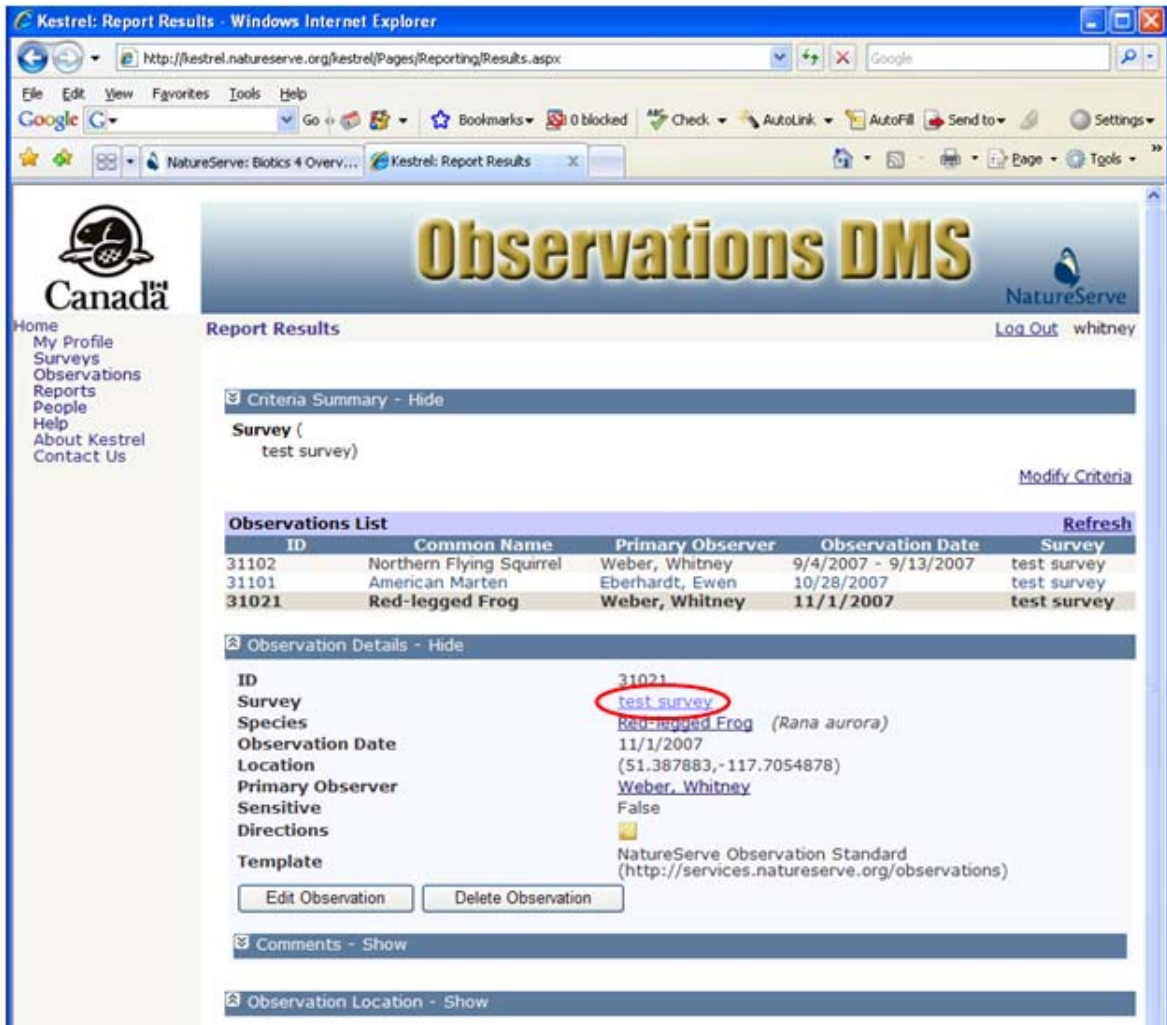
1. Within the *Report Criteria* page, [Define Criteria & Generate Report](#).
2. Within the *Report Results* page, click on the observation record and select **View** from the dropdown list.

The screenshot shows the 'Observations DMS' interface. The 'Observations List' table is as follows:

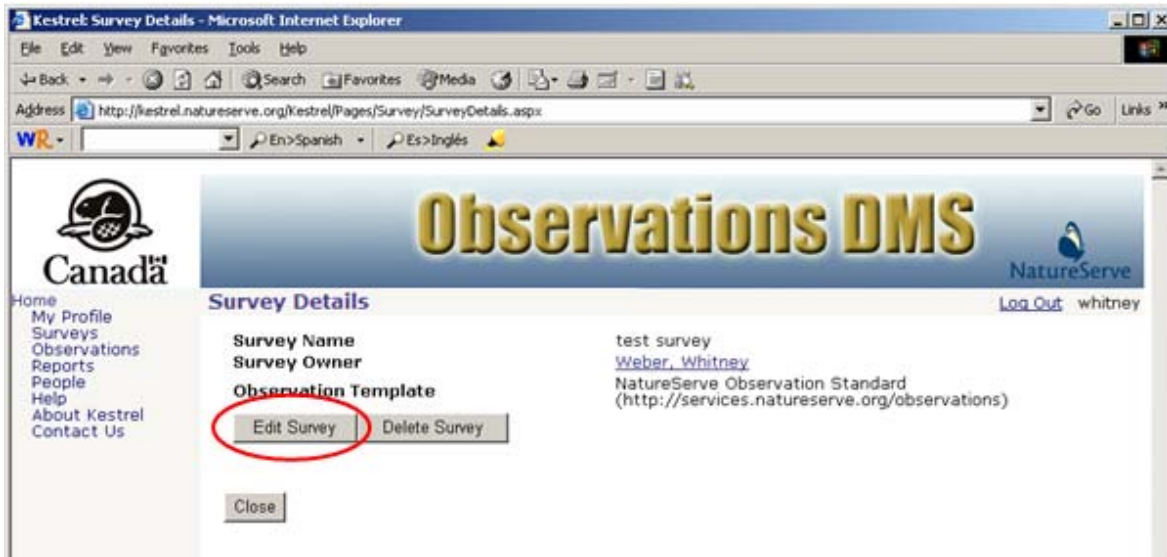
ID	Common Name	Primary Observer	Observation Date	Survey
31101	American Marten	Eberhardt, Ewen	10/28/2007	test survey
31021	Red-legged Frog	Weber, Whitney	11/1/2007	test survey

The 'View' option in the dropdown menu for the second row is highlighted in red.

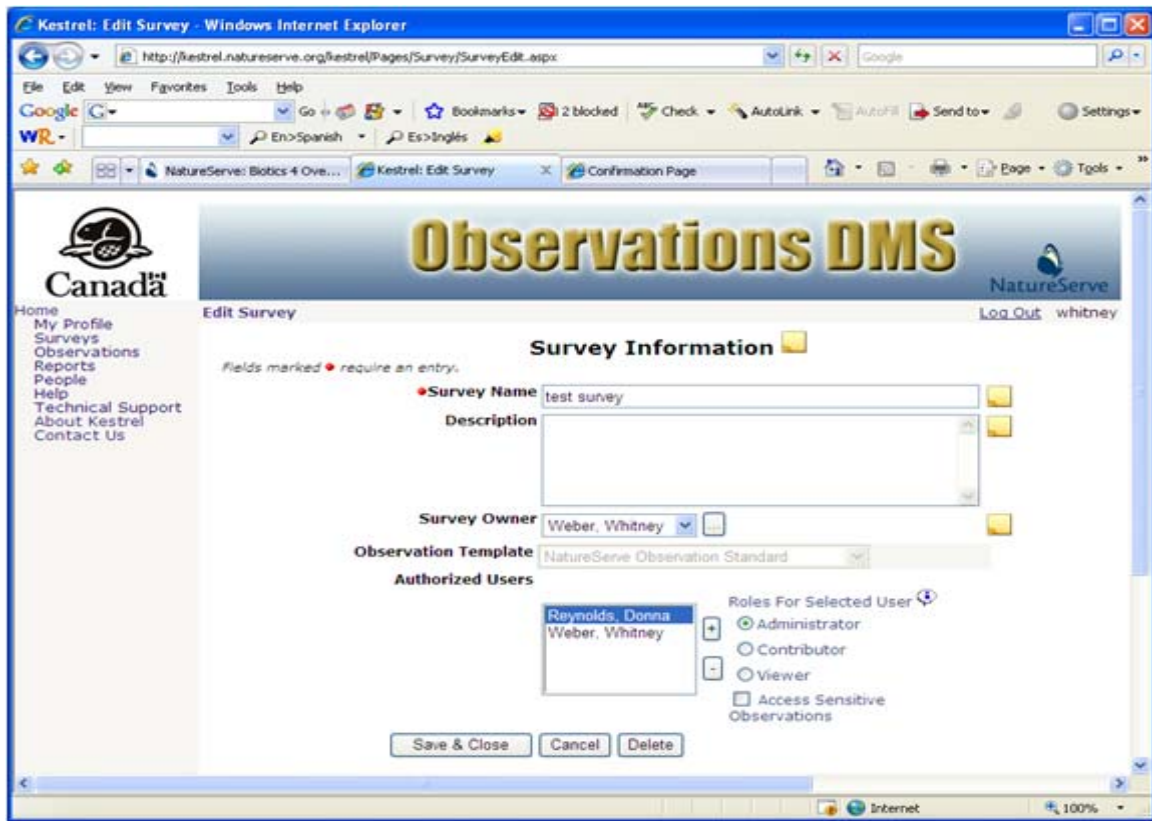
3. From within the Observation Details section, click the [Survey](#) link to navigate to the *Survey Details* page.



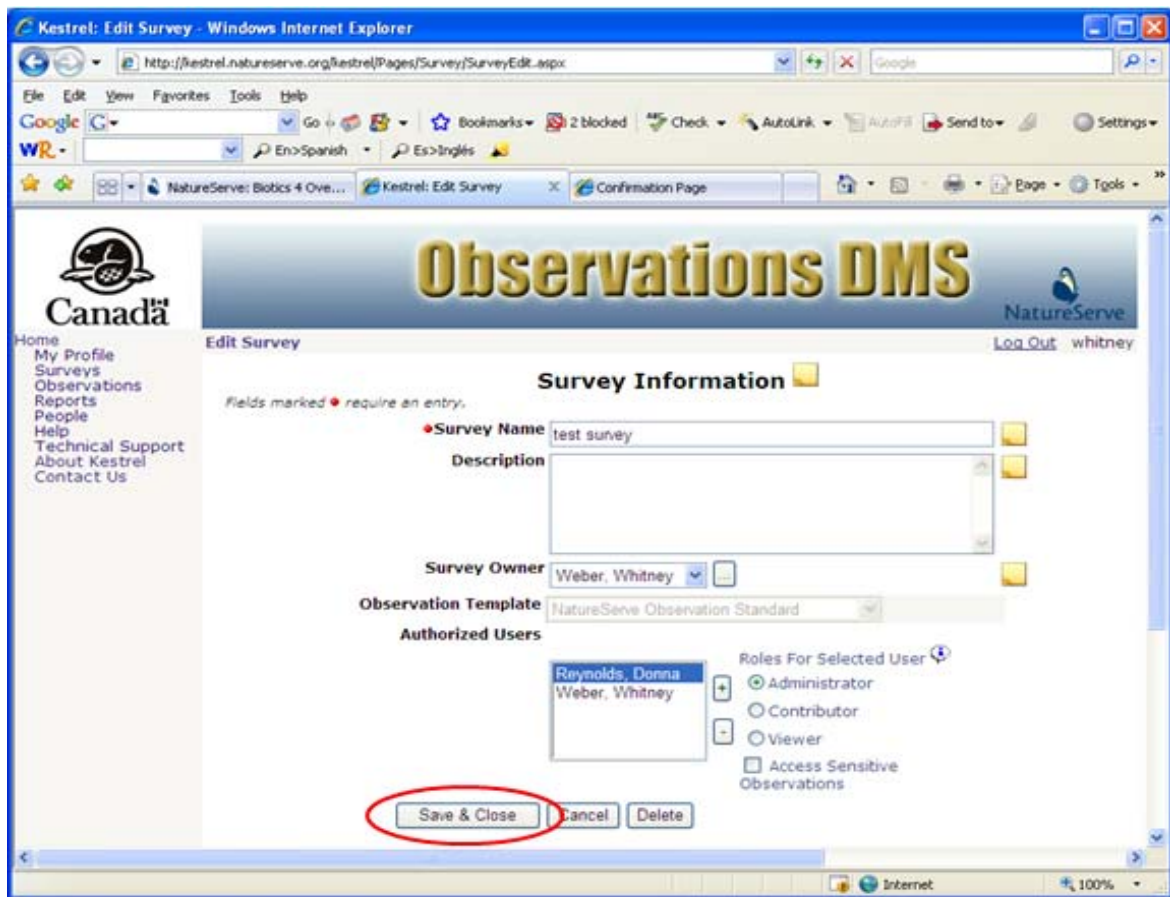
4. Within the *Survey Details* page, click **Edit Survey** which will take you to the *Edit Survey* page.



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.

Canada NatureServe

Report Results Log Out whitney

Criteria Summary - Hide

Survey (test survey) [Modify Criteria](#)

ID	Common Name	Primary Observer	Observation Date	Survey
31101	American Marten	Eberhardt, Ewen	10/28/2007	test survey
31021	Red-legged Frog	Weber, Whitney	11/1/2007	test survey

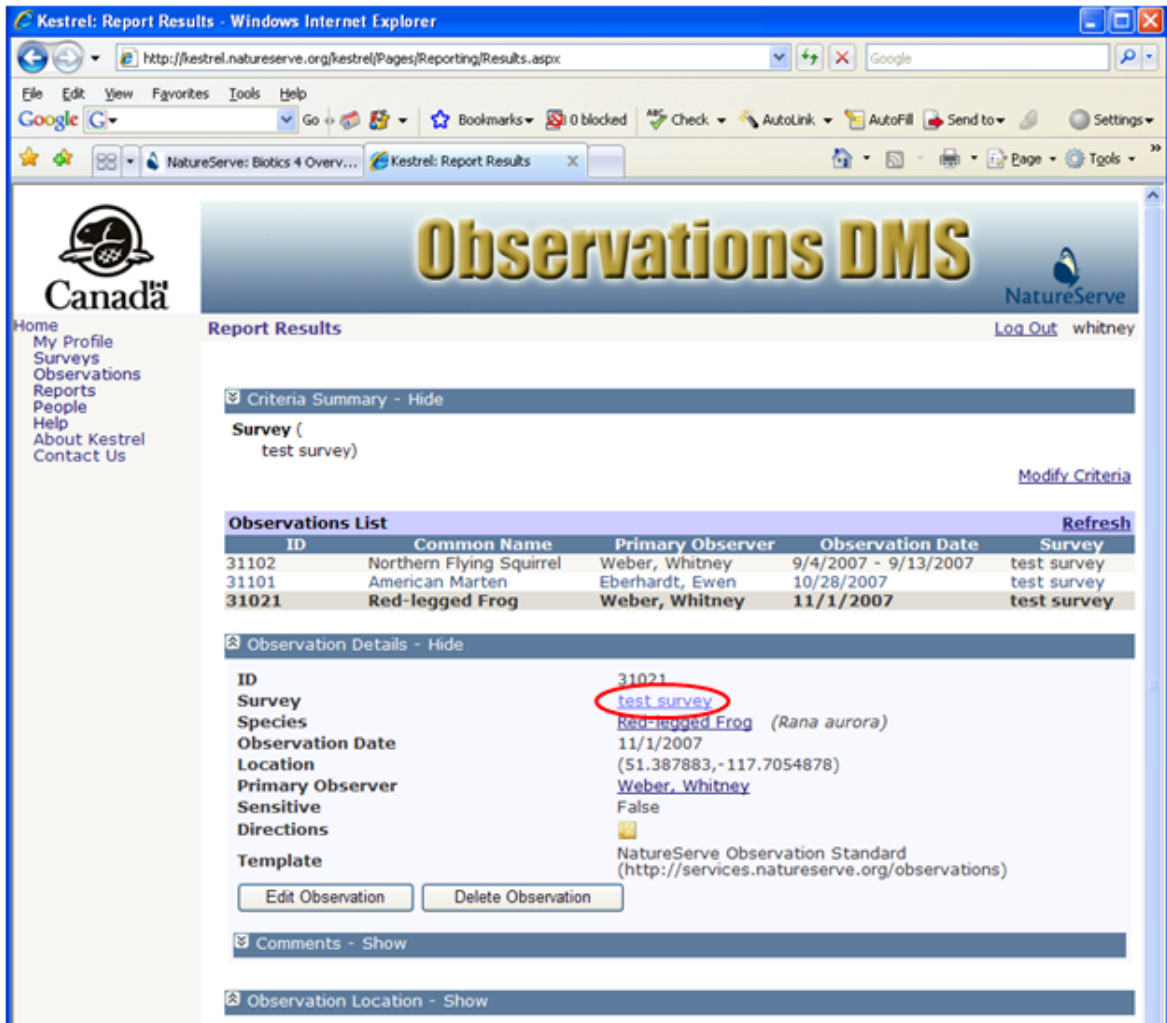
View Edit Delete

Details - Hide

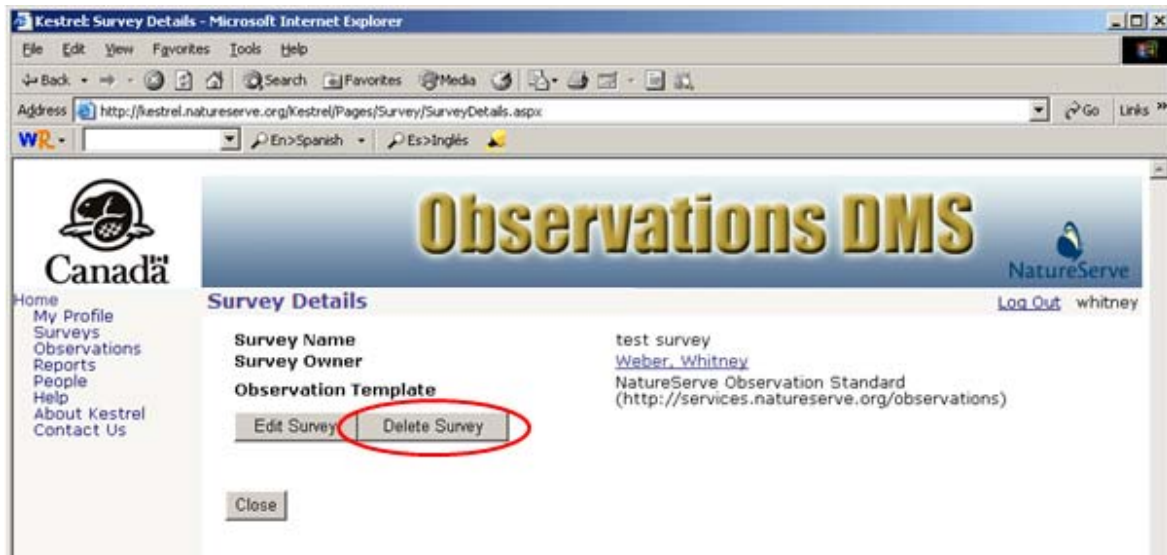
Observation to view its details

Observation Location - Show

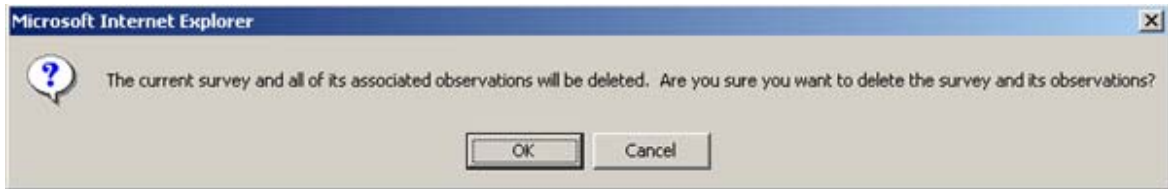
3. From within the Observation Details section, click the [Survey](#) link to navigate to the *Survey Details* page.



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

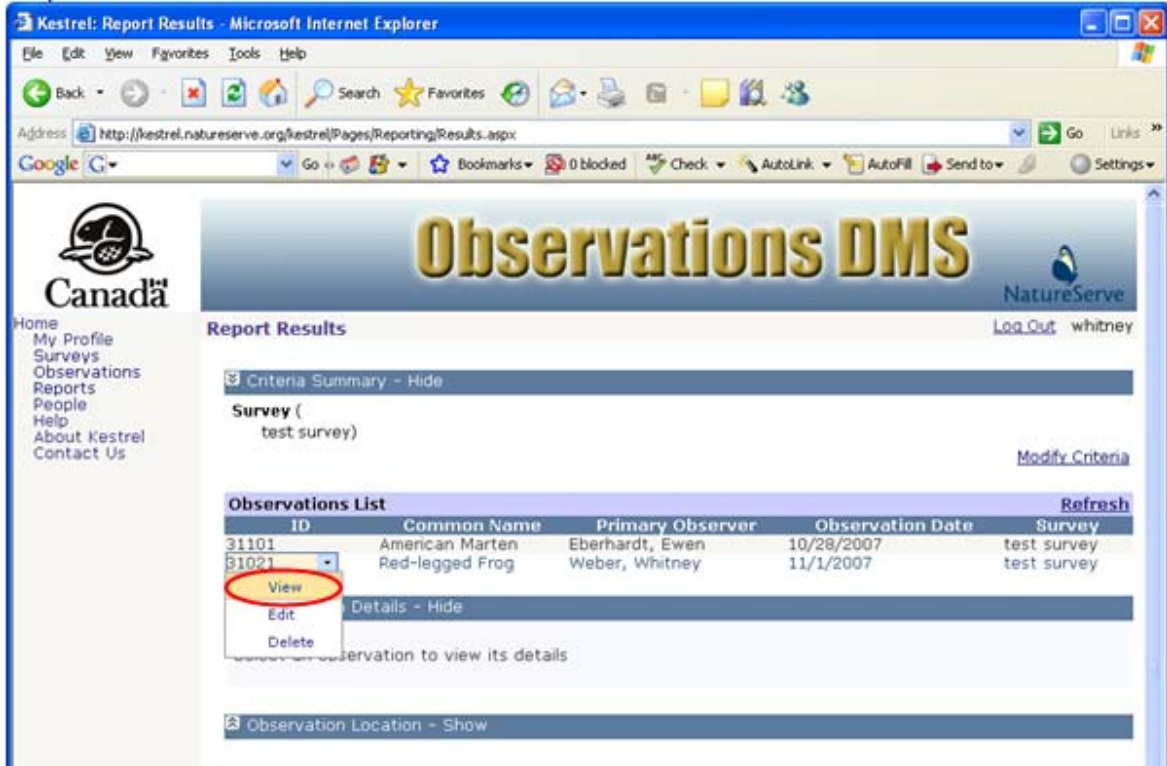


5. If a survey already contains observations, all observations contained within that survey will be deleted. You have the option to **CANCEL** the deletion at this point or you can proceed to delete the survey and all of its observations by selecting **OK**.



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.

The screenshot shows the 'Observations DMS' web application. The browser title is 'Kestrel: Report Results - Windows Internet Explorer'. The URL is 'http://kestrel.natureserve.org/kestrel/Pages/Reporting/Results.aspx'. The page features a navigation menu on the left with links like 'Home', 'My Profile', 'Surveys', 'Observations', 'Reports', 'People', 'Help', 'About Kestrel', and 'Contact Us'. The main content area is titled 'Report Results' and includes a 'Log Out whitney' link. A 'Criteria Summary - Hide' section shows 'Survey (test survey)' with a 'Modify Criteria' link. Below this is an 'Observations List' table:

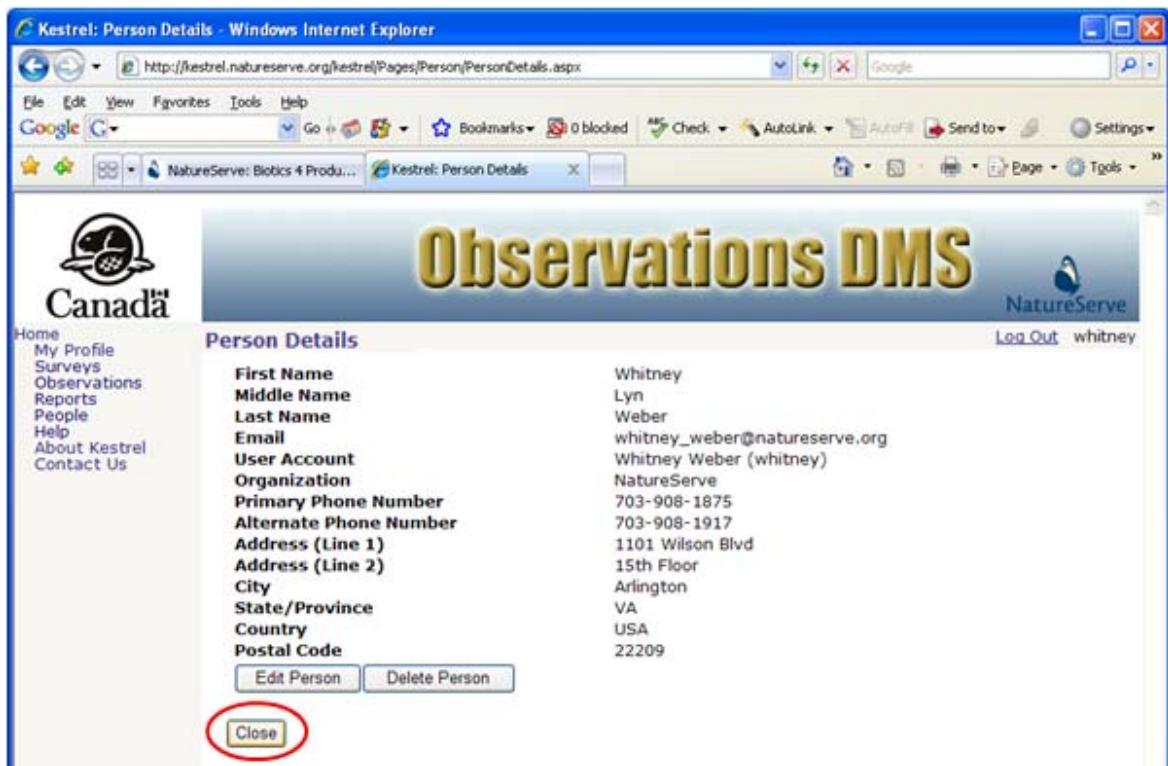
ID	Common Name	Primary Observer	Observation Date	Survey
31102	Northern Flying Squirrel	Weber, Whitney	9/4/2007 - 9/13/2007	test survey
31101	American Marten	Eberhardt, Ewen	10/28/2007	test survey
31021	Red-legged Frog	Weber, Whitney	11/1/2007	test survey

Below the table is an 'Observation Details - Hide' section for ID 31021. The details include:

- ID: 31021
- Survey: [test survey](#)
- Species: [Red-legged Frog](#) (*Rana aurora*)
- Observation Date: 11/1/2007
- Location: (51.387883 - 117.7054878)
- Primary Observer: **Weber, Whitney** (circled in red)
- Sensitive: False
- Directions:
- Template: NatureServe Observation Standard (<http://services.natureserve.org/observations>)

At the bottom of the details section are 'Edit Observation' and 'Delete Observation' buttons. There are also sections for 'Comments - Show' and 'Observation Location - Show'.

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](#).

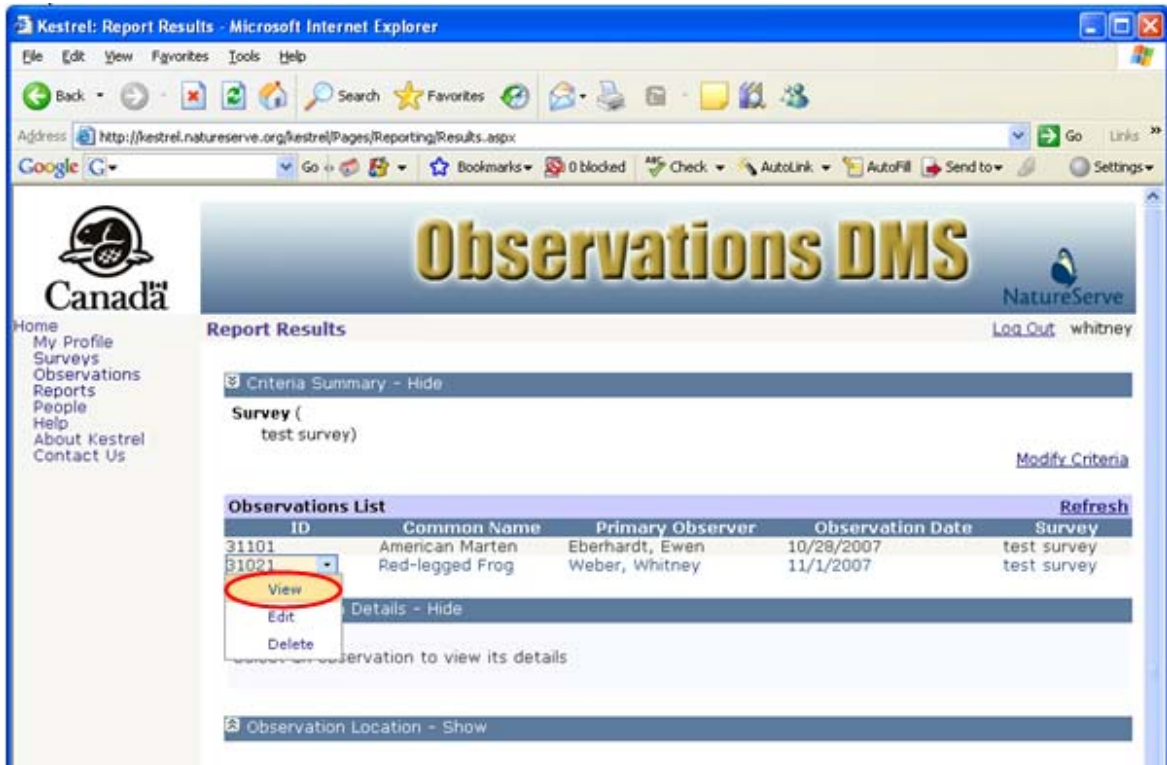


Related Tasks:

- [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.

The screenshot shows the 'Observations DMS' web application. The browser window title is 'Kestrel: Report Results - Windows Internet Explorer'. The URL is 'http://kestrel.natureserve.org/kestrel/Pages/Reporting/Results.aspx'. The page features a navigation menu on the left with links like 'Home', 'My Profile', 'Surveys', 'Observations', 'Reports', 'People', 'Help', 'About Kestrel', and 'Contact Us'. The main content area is titled 'Report Results' and includes a 'Log Out whitney' link. A 'Criteria Summary - Hide' section shows 'Survey (test survey)' with a 'Modify Criteria' link. Below this is an 'Observations List' table:

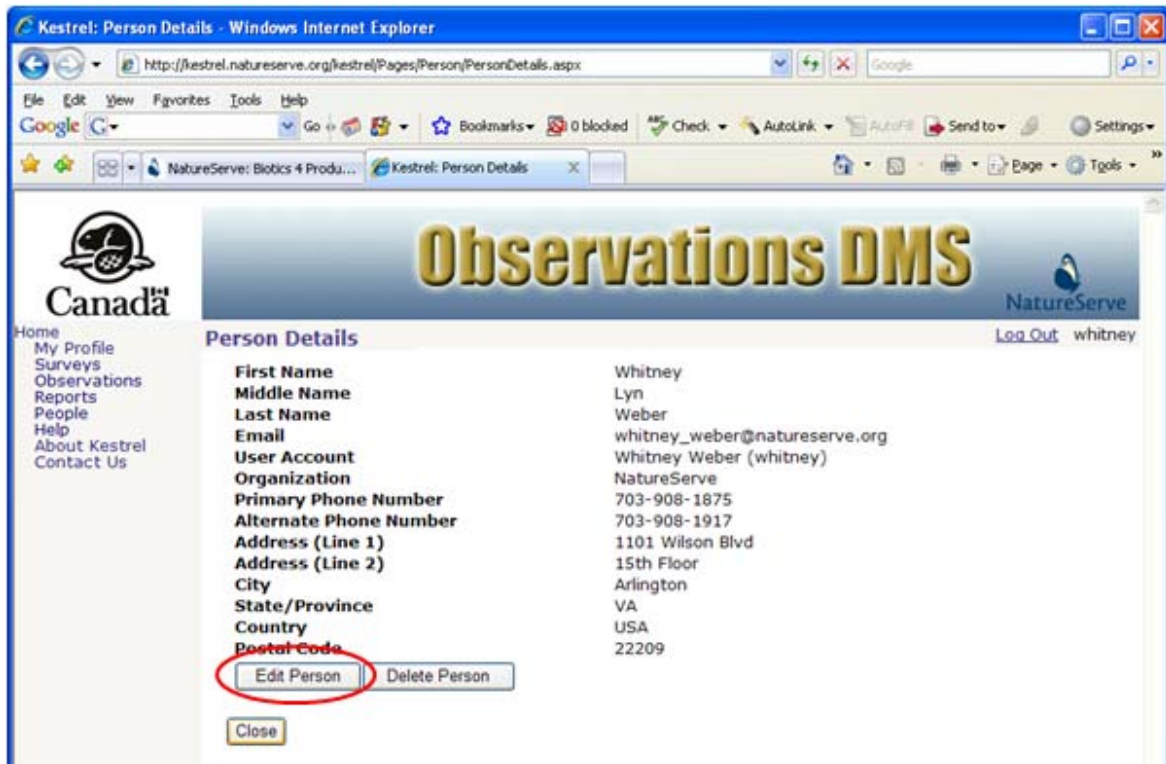
ID	Common Name	Primary Observer	Observation Date	Survey
31102	Northern Flying Squirrel	Weber, Whitney	9/4/2007 - 9/13/2007	test survey
31101	American Marten	Eberhardt, Ewen	10/28/2007	test survey
31021	Red-legged Frog	Weber, Whitney	11/1/2007	test survey

Below the table is an 'Observation Details - Hide' section for ID 31021. The details include:

- ID: 31021
- Survey: [test survey](#)
- Species: [Red-legged Frog](#) (*Rana aurora*)
- Observation Date: 11/1/2007
- Location: (51.387883 - 117.7054878)
- Primary Observer: **Weber, Whitney** (circled in red)
- Sensitive: False
- Directions:
- Template: NatureServe Observation Standard (<http://services.natureserve.org/observations>)

Buttons for 'Edit Observation' and 'Delete Observation' are visible. At the bottom, there are sections for 'Comments - Show' and 'Observation Location - Show'.

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.

Observations DMS

Canada NatureServe

Home
My Profile
Surveys
Observations
Reports
People
Help
Technical Support
About Kestrel
Contact Us

Log Out whitney

Person Information

Fields marked * require an entry.

*First Name Whitney
Middle Name Lyn
*Last Name Weber
Email whitney_weber@natureserve.org
User Account Whitney Weber (whitney)
*Organization NatureServe
Primary Phone Number 703-908-1875
Alternate Phone Number 703-908-1917
Address (Line 1) 1101 Wilson Blvd
Address (Line 2) 15th Floor
City Arlington
State/Province VA
Country USA
Postal Code 22209

Save & Close Cancel Delete Edit User Account

Related Tasks:

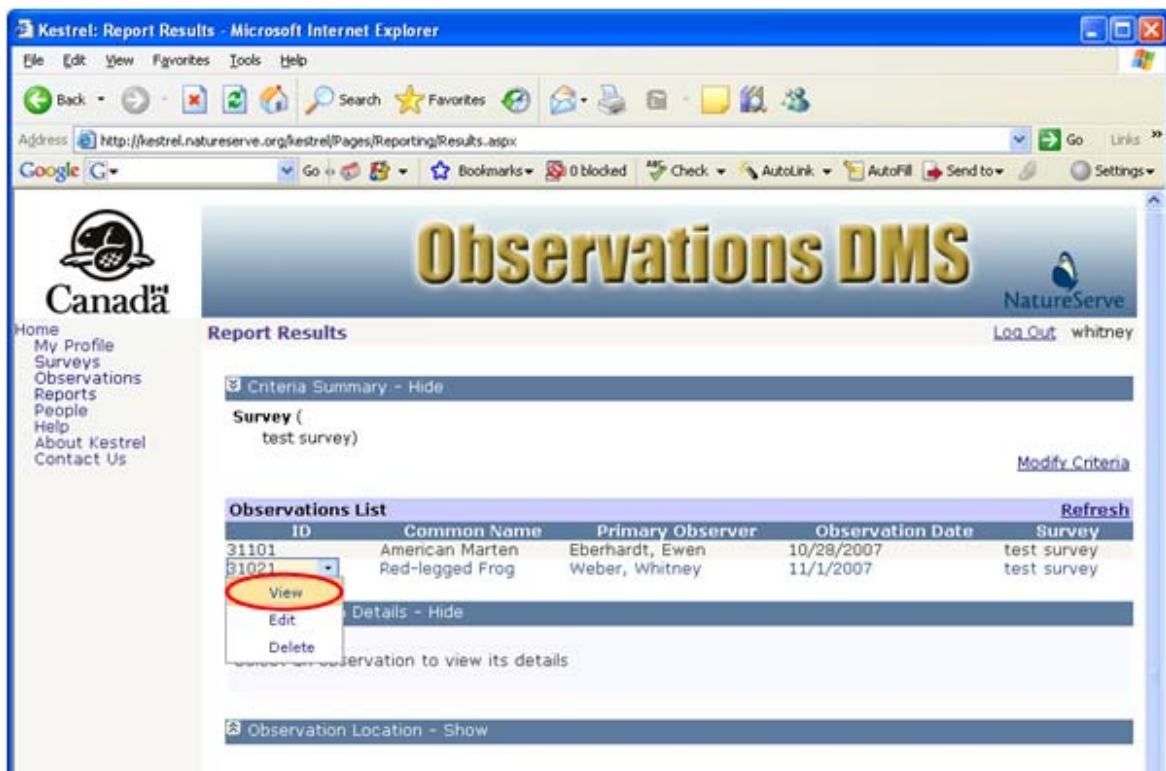
- [Edit User Account](#)
- [Delete Person](#)

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.

Observations DMS

Report Results [Log Out](#) whitney

Criteria Summary - Hide

Survey (test survey) [Modify Criteria](#)

Observations List					Refresh
ID	Common Name	Primary Observer	Observation Date	Survey	
31102	Northern Flying Squirrel	Weber, Whitney	9/4/2007 - 9/13/2007	test survey	
31101	American Marten	Eberhardt, Ewen	10/28/2007	test survey	
31021	Red-legged Frog	Weber, Whitney	11/1/2007	test survey	

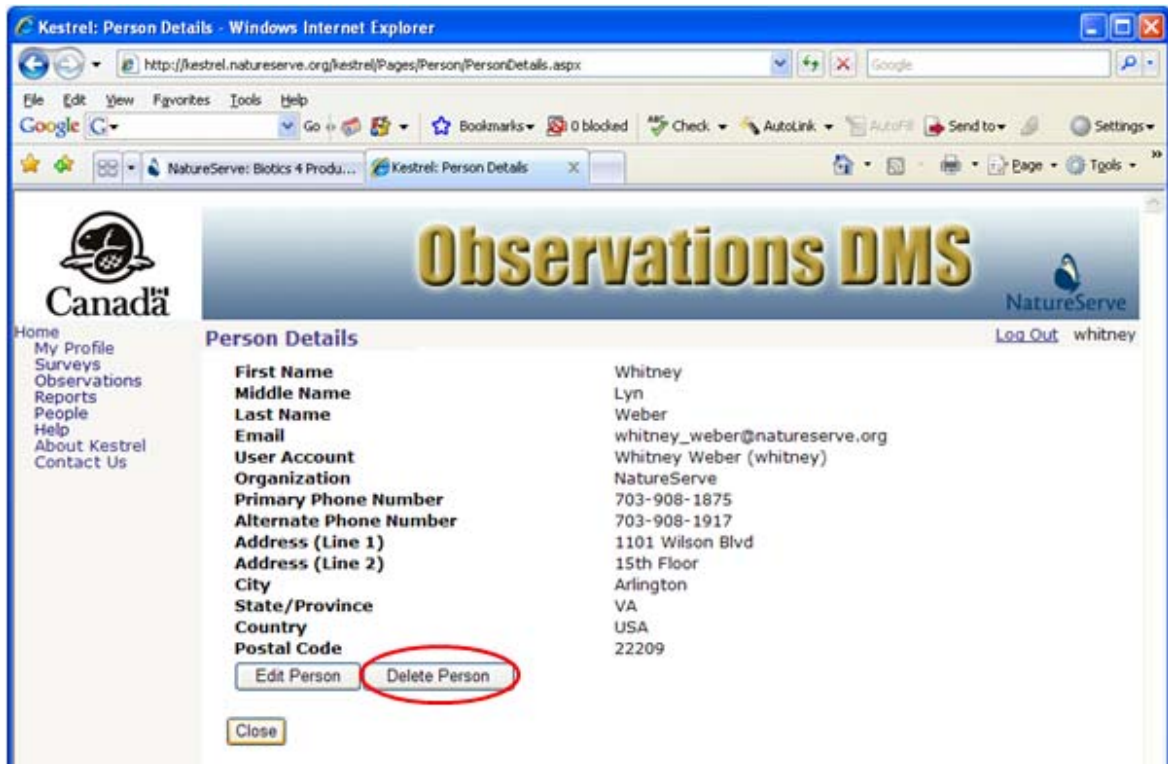
Observation Details - Hide

ID 31021
Survey [test survey](#)
Species [Red-legged Frog](#) (*Rana aurora*)
Observation Date 11/1/2007
Location (51.387883 - 117.7054878)
Primary Observer Weber, Whitney
Sensitive False
Directions
Template NatureServe Observation Standard (<http://services.natureserve.org/observations>)

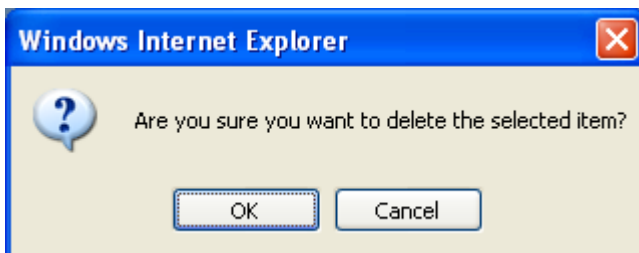
Comments - Show

Observation Location - Show

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.

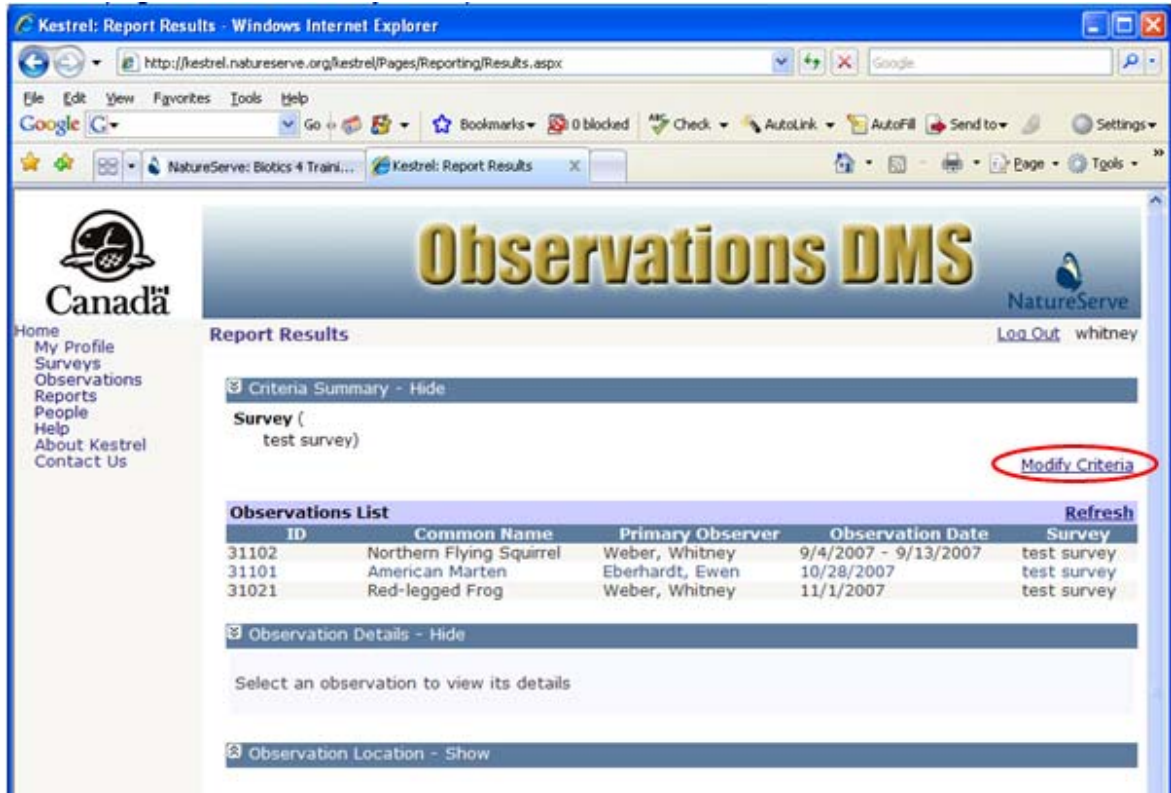


Related Tasks:

- [Edit Person](#)

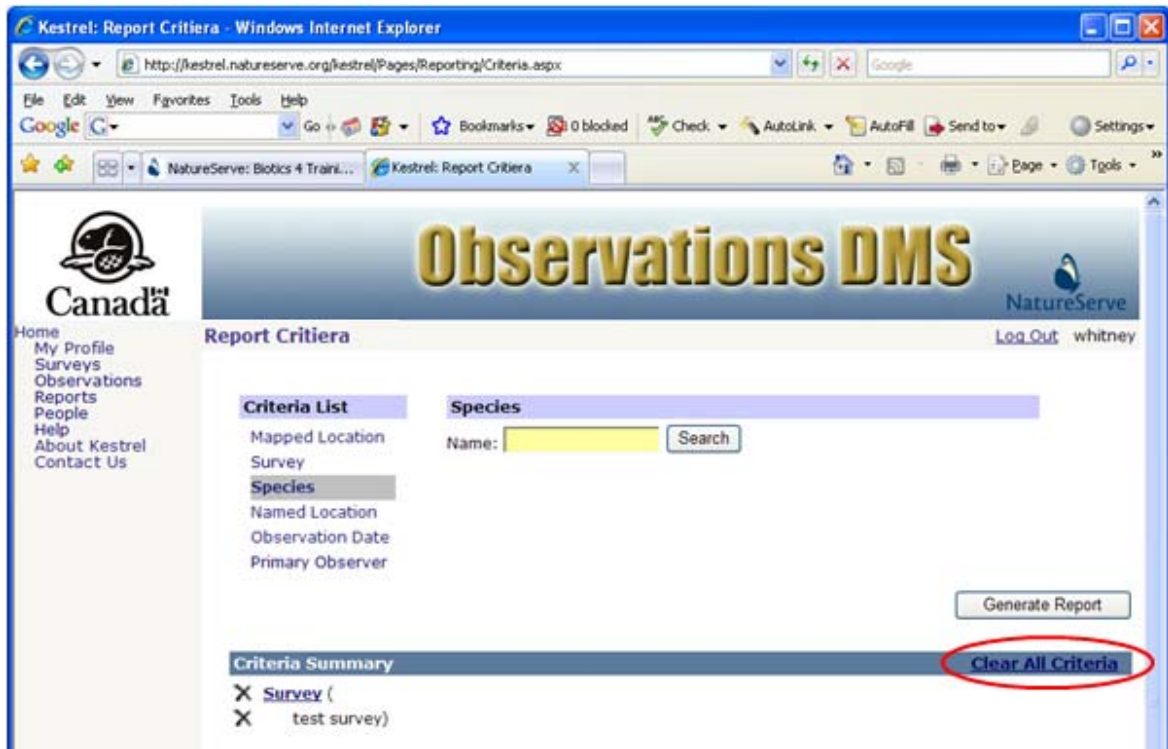
Modify Criteria

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**.

The screenshot shows the 'Kestrel: Report Criteria' page in a Windows Internet Explorer browser. The page title is 'Observations DMS' and the user is logged out as 'whitney'. The main content area is titled 'Report Criteria' and contains several sections:

- Criteria List:** A list of criteria including 'Mapped Location', 'Survey', 'Species', 'Named Location', 'Observation Date', and 'Primary Observer'. The 'Species' criterion is currently selected.
- Species:** A search box with 'flying squirrel' entered and a 'Search' button. Below it is a table of search results.
- Search Results Table:**

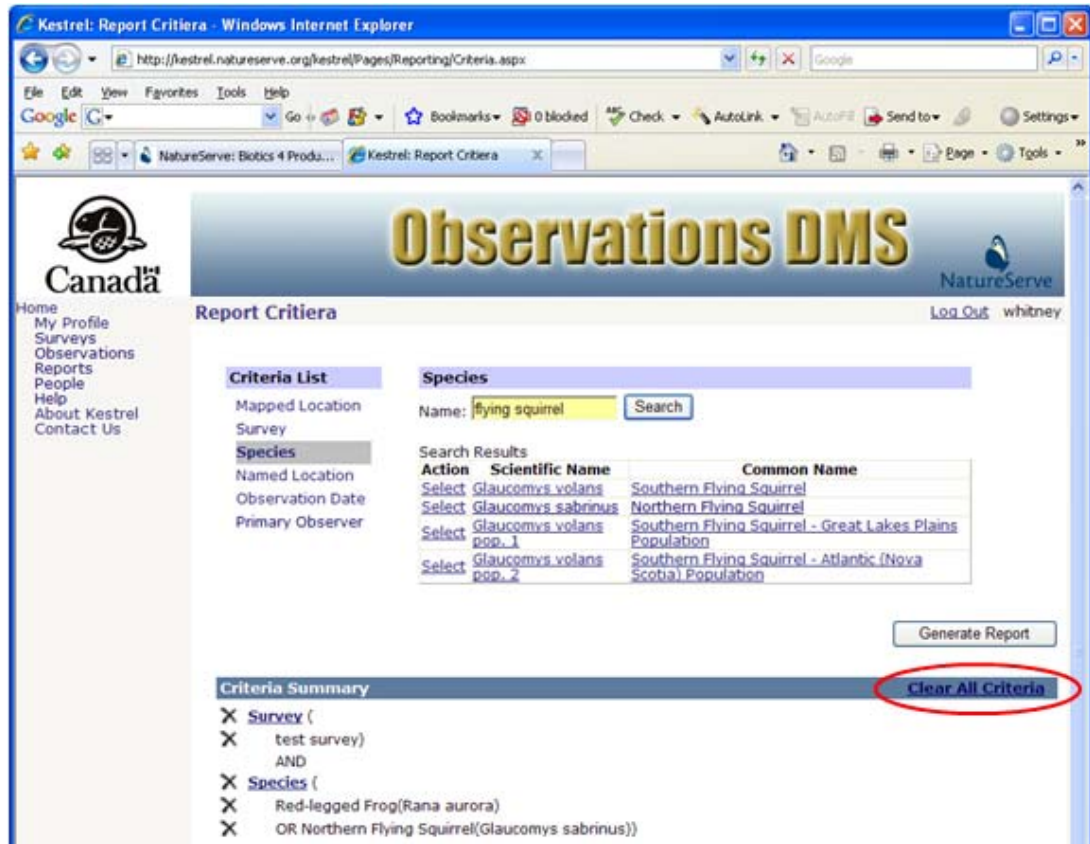
Action	Scientific Name	Common Name
Select	Glaucomys volans	Southern Flying Squirrel
Select	Glaucomys sabrinus	Northern Flying Squirrel
Select	Glaucomys volans pop. 1	Southern Flying Squirrel - Great Lakes Plains Population
Select	Glaucomys volans pop. 2	Southern Flying Squirrel - Atlantic (Nova Scotia) Population
- Criteria Summary:** A summary of the selected criteria:
 - X Survey (test survey)
 - AND
 - X Species (
 - X Red-legged Frog(Rana aurora)
 - X OR Northern Flying Squirrel(Glaucomys sabrinus)
- Buttons:** A 'Generate Report' button is circled in red, and a 'Clear All Criteria' button is located at the bottom right of the criteria summary section.

Related Tasks:

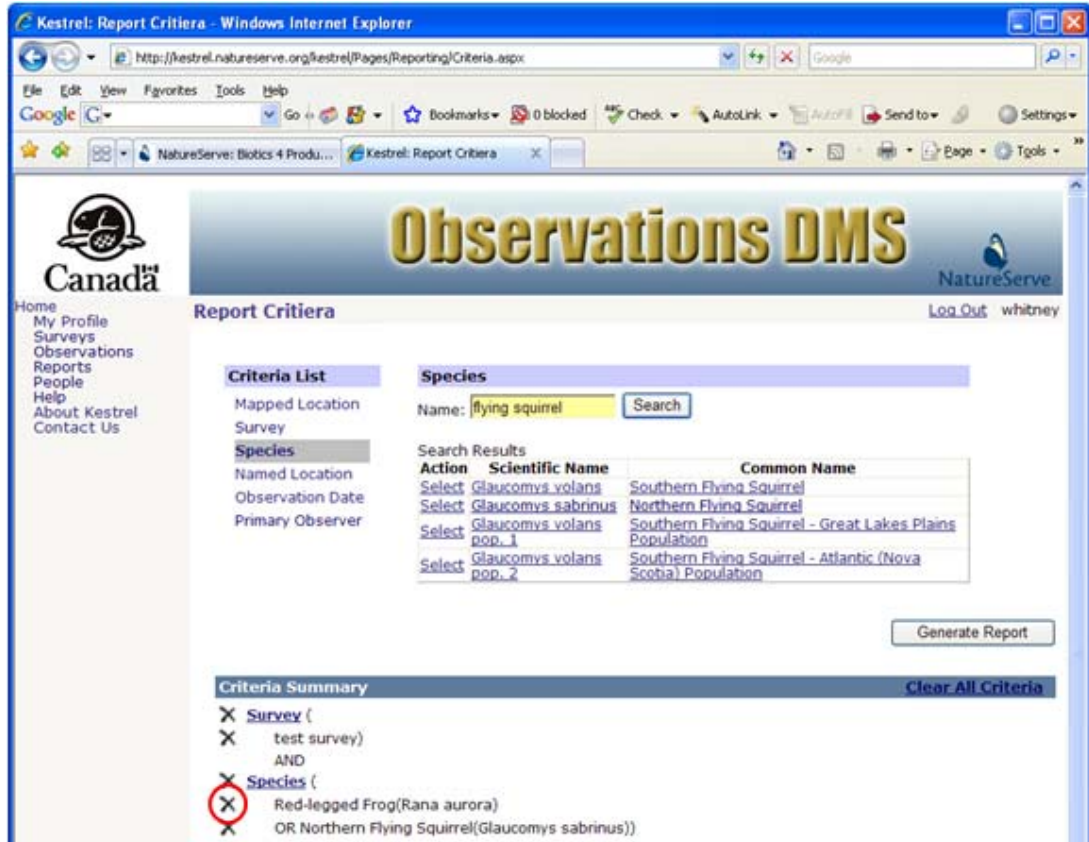
- [Define Criteria & Generate Report](#)
- [Clear Criteria](#)

Clear Criteria

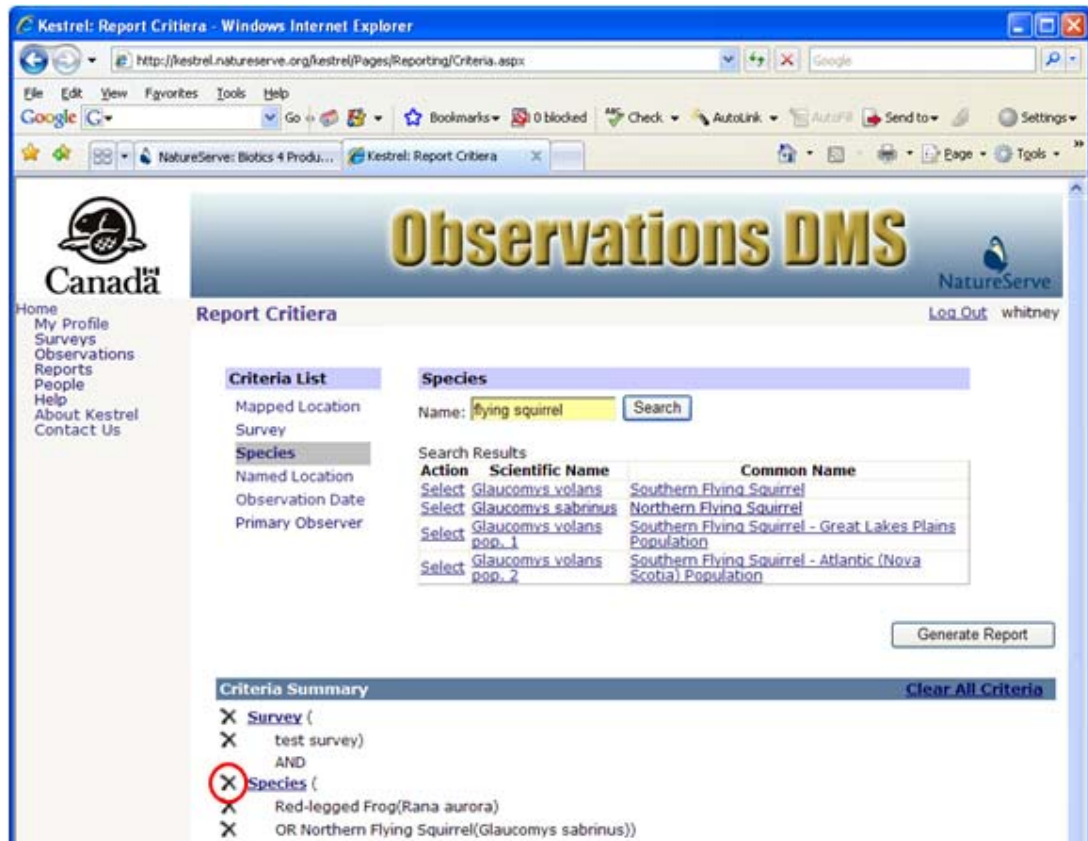
1. Within the *Report Criteria* page, either **Clear All Criteria** or individual criteria values or groups of criteria values.
 - To clear all criteria, select **Clear All Criteria**.



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



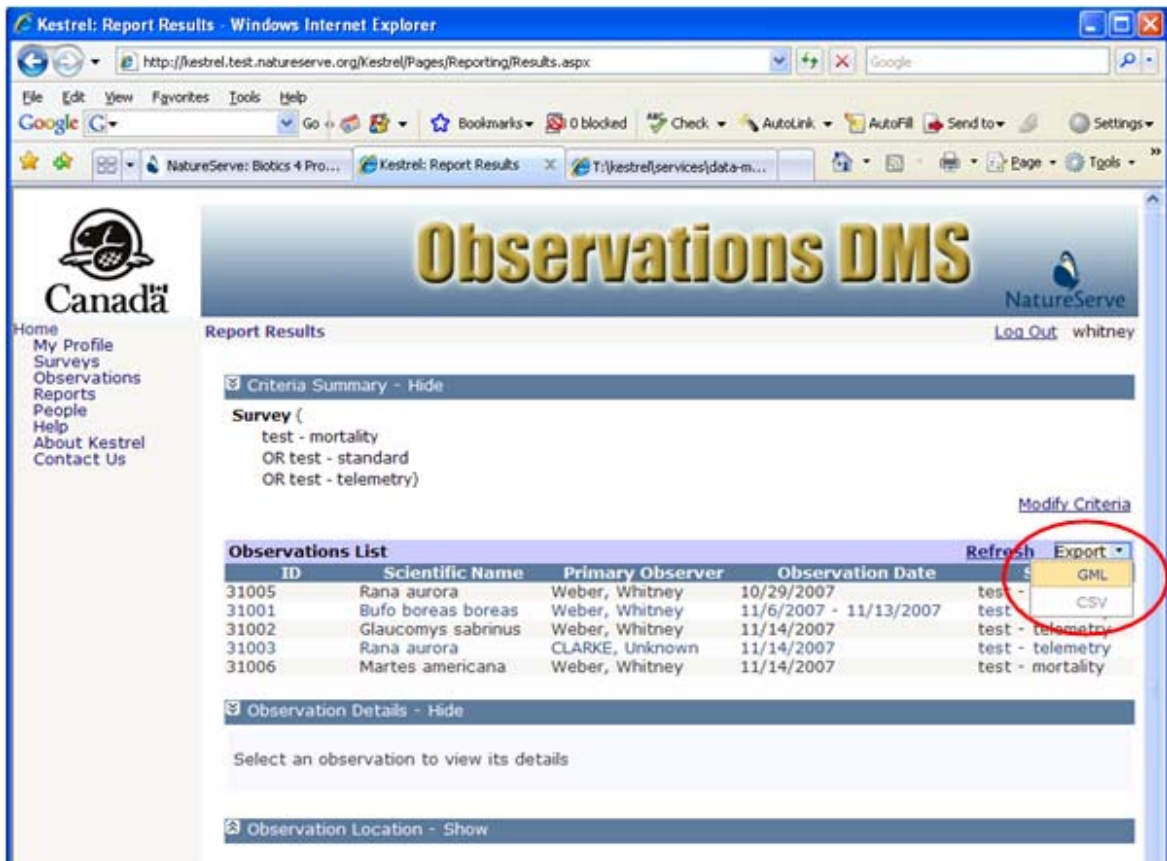
2. After removing the unwanted criteria, either add additional criteria ([Define Criteria & Generate Report](#)) or **Generate Report** with the current criteria settings.

Related Tasks:

- [Define Criteria & Generate Report](#)

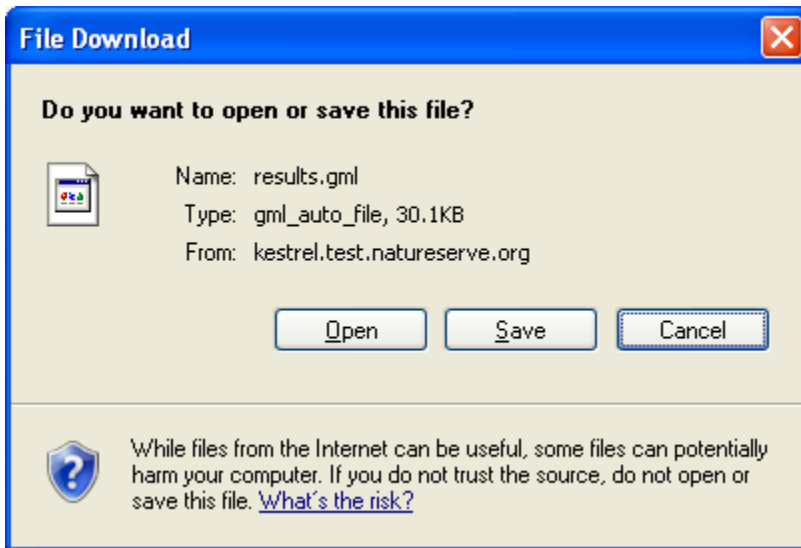
Export Results

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



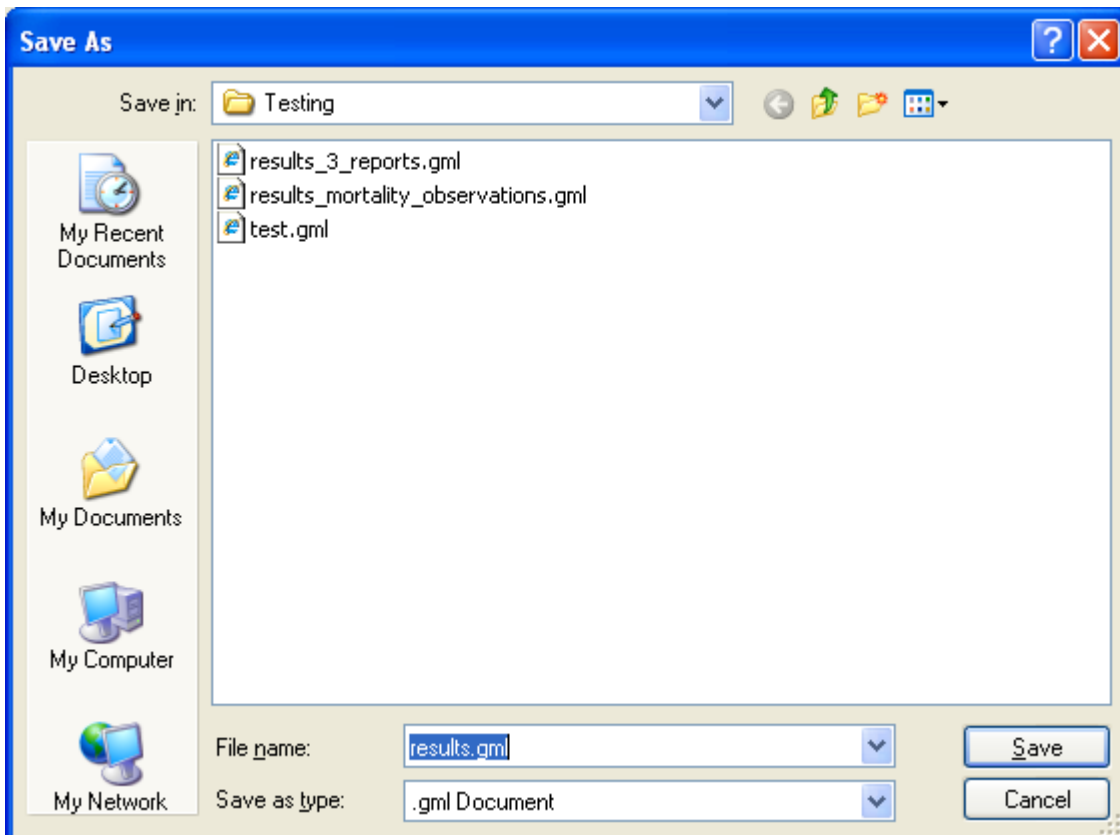
NOTE: Depending on the amount of data, the export process can take a number of minutes.

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.

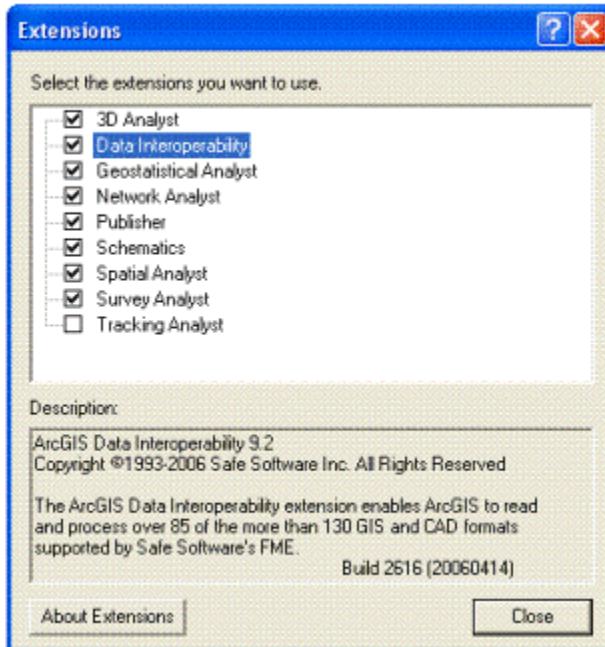


Related Tasks:

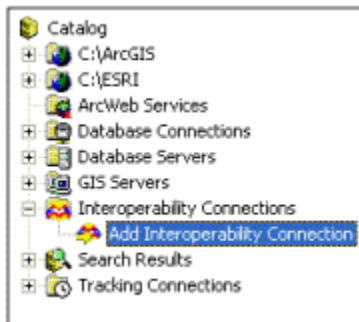
- [Define Criteria & Generate Report](#)
- [Import GML to ArcCatalog](#)

Import GML to ArcCatalog

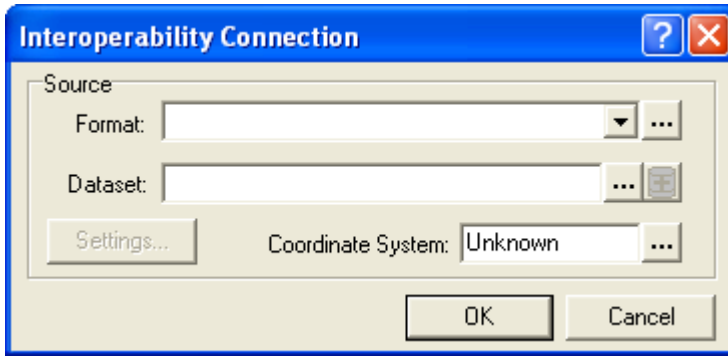
1. In ArcCatalog, enable the Data Interoperability Extension: from the Tools menu, click Extensions and ensure that you have checked Data Interoperability.



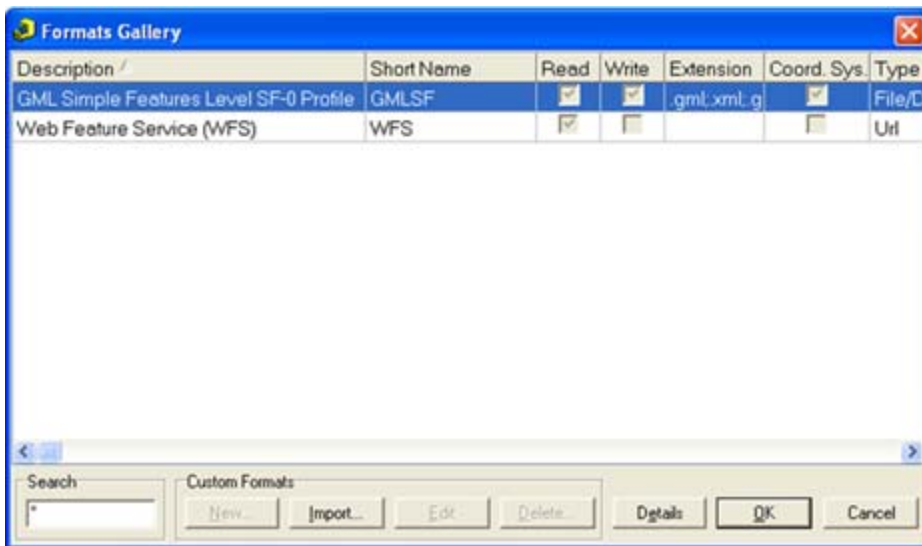
2. Add a new interoperability connection by double-clicking on "Add interoperability connection"



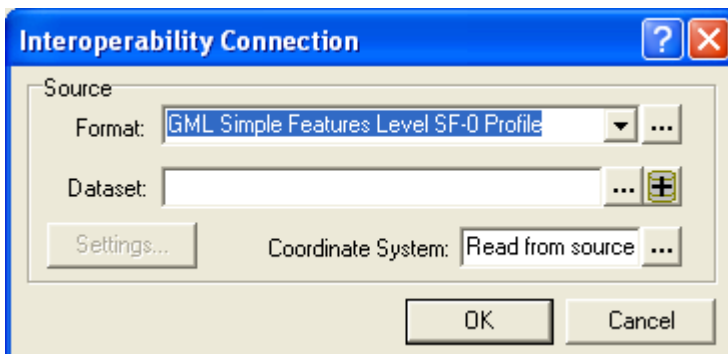
3. Click the browse.png button for Format to open the Formats Gallery.



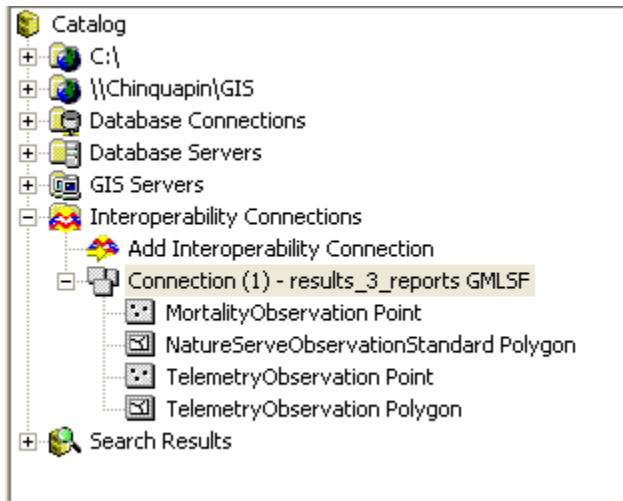
4. Within the Formats Gallery select the GML simple features specification - **GML Simple Features Level SF-0 Profile** and click **OK**.



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.