Greater Sage-grouse Conservation Efforts Database Help Document Version 1.0

A Living Document That Will Be Refined With Use

U.S. Fish and Wildlife Service

August 2014

Contents

GETTING STARTED

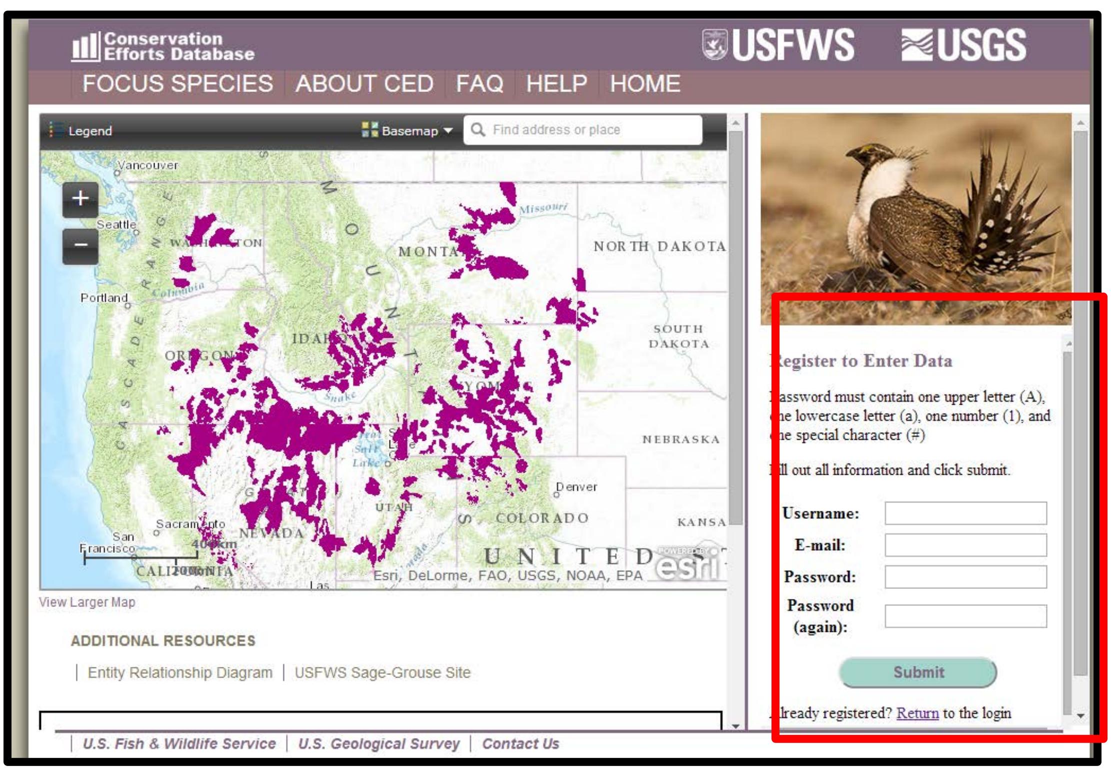
In order to use the Conservation Efforts Database (CED), agencies/organizations must first provide information on the agency/organization structure for the CED user registration process and the following security functions:

- Development of the drop down menus for the user profiles
- Identification of one or more “approving officials” or “gatekeepers” to ensure that data providers entering information on behalf of the agency/organization are actually from the agency/organization.
- Designation of one or more “approving officials” to review and approve project and plan records for public viewing and use by the Service. This step allows for quality control for agencies/organizations. .
- Determining who has permission to modify conservation efforts for the agency/organization:
    - the data provider that created the project,
    - other employees within the data provider’s office, or
    - the approving official for that project/plan.

To get started, please visit the help menu at https://conservationefforts.org and follow the instructions for submitting this information.

REGISTER FOR AN ACCOUNT

Once the agency/organization has provided information on organizational structure and approving officials, individual data providers will be able to register for an account.

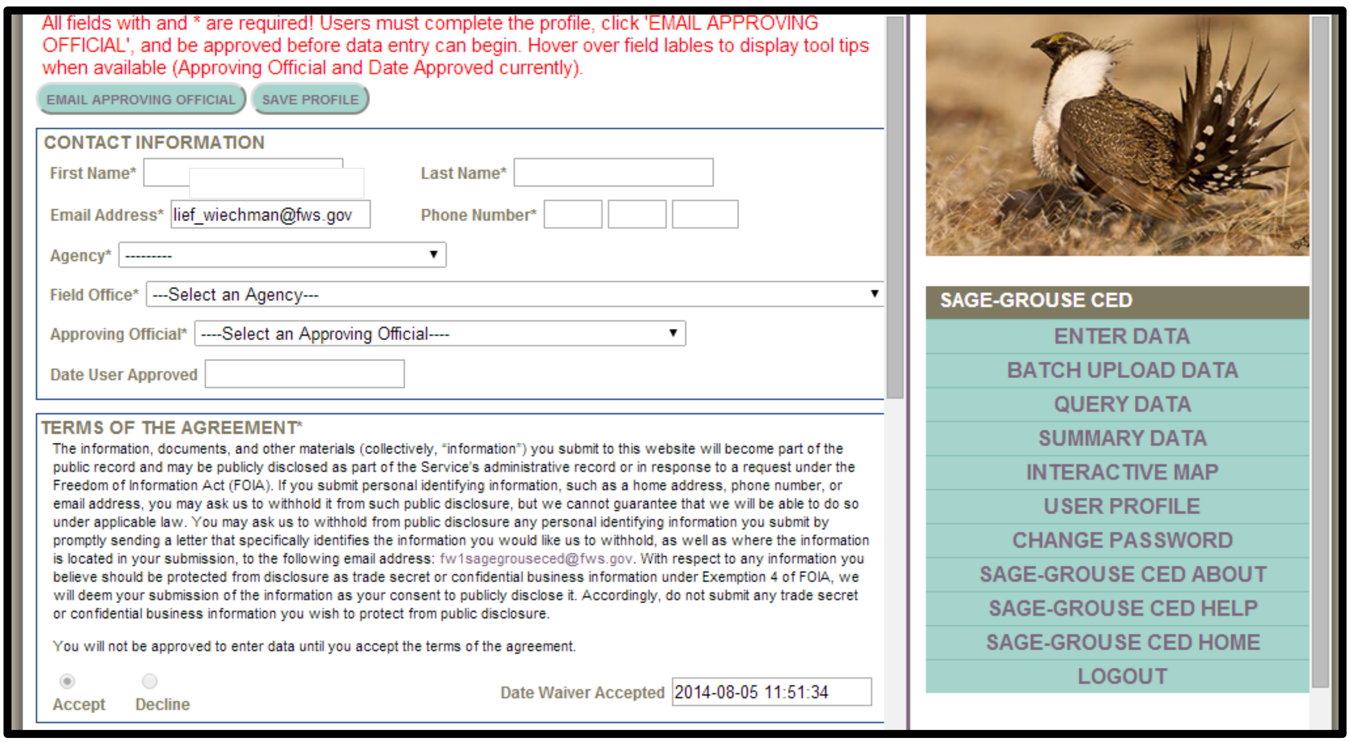


To register for an account, go to https://conservationefforts.org/sgce/accounts/register/, enter your information, and click 'Submit.' You will receive an email within several minutes, containing a link that will allow you to activate your account. Once your account has been activated, proceed to the next step to enter your profile information.

ENTER PROFILE INFORMATION

To log in and enter data, visit https://conservationefforts.org/sgce/

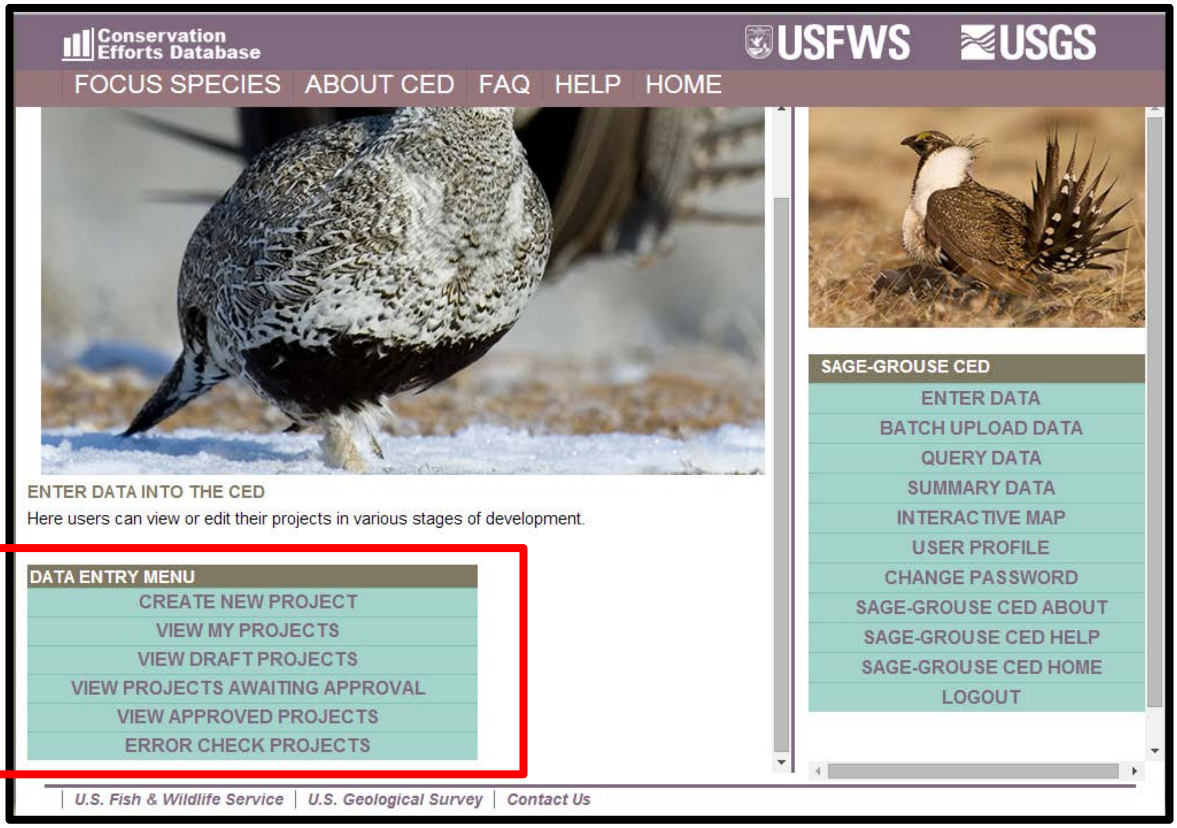
When you log in for the first time, you will automatically be directed to the 'Main Page' where you will be asked to provide your contact information. Fill out all required fields marked with an asterisk (*). Approving officials should have already been designated for your agency/organization, and will appear in a drop-down menu. If you don't see an approving official, please contact your agency lead for the CED. If you don't know who that is, contact the CED team fw1sagegrouseced@fws.gov for assistance.



All data providers must accept the terms of the agreement in order to be able to enter your conservation efforts into the CED. Click 'Email Approving Official' to request access to enter data from your agency/organization. You cannot enter data until your agency/organization's approving official has authorized you to do so. You will receive an auto-generated email when that has occurred.

CREATE A NEW PROJECT/PLAN

You must be logged in to enter data. After logging in, you will see a menu (SAGE-GROUSE CED) on the right side of your screen that will help you navigate the CED. Select 'ENTER DATA' to enter a new conservation effort (project or plan). After you have selected the link, you should be brought to the page below that provides data entry options.



VIEW AND EDIT A PROJECT/PLAN

Visit the 'View my Projects' page at https://conservationefforts.org/sgce/viewprojects/ to select a conservation effort for editing. Click the name to open the project or plan. When logged into the CED, this menu option will be on the data entry menu.

DELETE A PROJECT/PLAN

Currently, there is no method to delete an effort within the CED. In the near future the CED will be updated and will allow data provider s and approving officials to flag a project for deletion. . To permanently delete a project from the database please contact the CED team fw1sagegrouseced@fws.gov to request permanent deletion/removal from the CED.

ENTERING A CONSERVATIONPROJECT OR PLAN

Conservation Effort Name & Completion Status

Indicate the name of the conservation effort (either a plan or a project) using fewer than 50 characters.

Select an Implementation Status. “Planned” conservation efforts have not been implemented in any way. Those efforts that are “In Progress” have been only partially implemented and have not been completed. A conservation effort that would be considered “Completed” no longer requires further actions aside from general monitoring or maintenance.

The Implementing Party, Office, and Date created fields are automatically filled using information from your user profile. It is not possible to edit these fields. Any changes made will not be saved.

A unique conservation effort Project ID number will be assigned for each plan and project entered in the CED and is viewable in the leftmost column on the View Projects page at https://conservationefforts.org/sgce/viewprojects/.

Click ‘Save and Continue’ to proceed to the next page. Aside from the conservation effort name, these fields may be edited from Step 5 (see below). Once you have clicked ‘Save and Continue,’ you will no longer be able to edit the name of your conservation effort.

You may at any time review your data to ensure that all of the required fields have been properly completed by clicking the ‘Review Entry’ button near the top of the screen.

IMPORTANT NOTE: To navigate the Edit Project page, you may click any of the buttons across the top of the page to quickly go from one step to another. Any changes you make to the steps as you navigate back and forth will be automatically saved, but ONLY TEMPORARILY. You must click ‘Save and Exit’ before leaving the site to save the information you have entered (see screenshot below). Closing your browser window or using the ‘Back’ button on your browser without first clicking ‘Save and Exit’ will result in loss of entered data.

Step 1: Spatial Information

Enter the spatial information for your conservation effort. This information may be entered either manually or via shapefiles. Shapefiles must include the appropriate spatial metadata and be zipped and uploaded using the ‘Upload Shapefile’ button on the left side of the screen. Please verify that the locations that appear on the map correspond with the locations you intended to upload.

To enter the information manually, zoom to the area of the map where the conservation efforts took place or are planned to take place, select 'Draw Polygon,' 'Draw Line,' or 'Draw Point' at the top of the map, and click to enter a shape. If you are drawing a line or polygon, you can finish your shape by double clicking.

To search for a specific location, enter the name of the place into the search bar in the column on the left side of the screen. (Note that searches for cities should include just the city name and not the state; e.g., Denver instead of Denver, CO.) Double click on an item that appears in the list beneath the search bar to zoom to that specific location.

The Extents List in the column on the right side of the screen will have a list of all the points, lines, and polygons that you have uploaded or entered manually. To delete an item, select the ' – ' button. To edit the name of an item, select the 'Info' button and enter a short name.

IMPORTANT NOTE: You must click the white 'Save' button just above the map before clicking the turquoise 'Step 1 of 6: Save and Continue' button. If you click the turquoise button before white 'Save' button, all of the spatial information you have entered will be lost (see screenshot below).

If you receive an error message while trying to complete these steps, please click the link provided to re-establish a secure connect (see screenshot below).

Once you click 'Step 1 of 5: Save and Continue,' you will automatically be directed to Step 2.

Step 2: Activity Information

Select an Effort Type, Activity, and Subactivity (in that order). Choosing these fields will cause the metrics and threats fields to auto-populate.

Enter all applicable metrics and select the threats addressed by your project or plan. Refer to the User Guide to determine what information should be included in the Objectives Description and Effects Description narrative boxes.

Click 'Step 2 of 6: Continue to Step 3.' You will automatically be directed to Step 3.

Step 3: Documentation

This is your opportunity to upload supporting documentation. Supporting documents are not required but may be helpful to provide context and/or validation for the conservation effort. Documents such as progress reports, published/peer reviewed journal articles, effectiveness monitoring reports, and other written products can be useful to better explain the purpose, objective, or scope of the conservation project or plan, demonstrate effectiveness, or explain the implementation status or process.

Select files you wish to upload by clicking the 'Browse…' button. A window will pop open that will allow you to navigate to your supporting documents. Multiple files can be uploaded by using the 'Crtl' and 'Shift' commands. Once you have selected your files, click 'Open' to close the window and 'Upload' to upload the chosen files. Please wait for your files to upload and do not click the back or forward buttons. Once your files have uploaded, fill in the File Type and Document Description fields for each one. You are also able to download your files from this page.

Click 'Step 3 of 6: Continue to Step 4.' You will automatically be directed to Step 4.

If you run into an error while trying to upload documents, check to make sure you have entered spatial information through the map in Step 1. You will be unable to upload documents until Step 1 has been completed.

Step 4: Location Information

The Western Association of Fish and Wildlife Agencies (WAFWA) Sage-Grouse Management Zones (MZ), Sage-grouse Populations, States, Counties, and Hydrologic Unit Code (HUC) fields will be automatically populated based on the spatial information entered in Step 1. The process applied to automatically select the boxes in each of these fields uses GIS layers from our database. To reduce the processing time, only the parts of these zones that intersect with the historic sage-grouse range are included in our layers. If your spatial perimeter falls outside of the historic sage-grouse range, it is possible that some spatial data (e.g., a state) might be included while others (e.g., HUC 12) are missed. Please verify that all of the correct locations are checked. If some location information remains unchecked, please ensure that the spatial data you have entered is in the correct location. If the spatial data you have entered is not in error, please email the CED team at fw1sagegrouseced@fws.gov.

The 'Ownership' checklist will not be automatically populated. Select the appropriate land owners that correspond with your conservation area.

Click 'Step 4 of 6: Continue to Step 5.' You will automatically be directed to Step 5.

Step 5: Implementation Information

The first question of Part 1 is automatically completed using information you provided when you began entering the project or plan in the CED. Please verify that it is correct before continuing. Fill in your response to the second and third questions. If your conservation effort was considered effective, you will need to explain why in the text box provided.

Please read through the questions in Part 2 or 3 and select the appropriate response for your conservation effort.

Click 'Step 5 of 6: Continue to Step 6.' You will automatically be directed to Step 6.

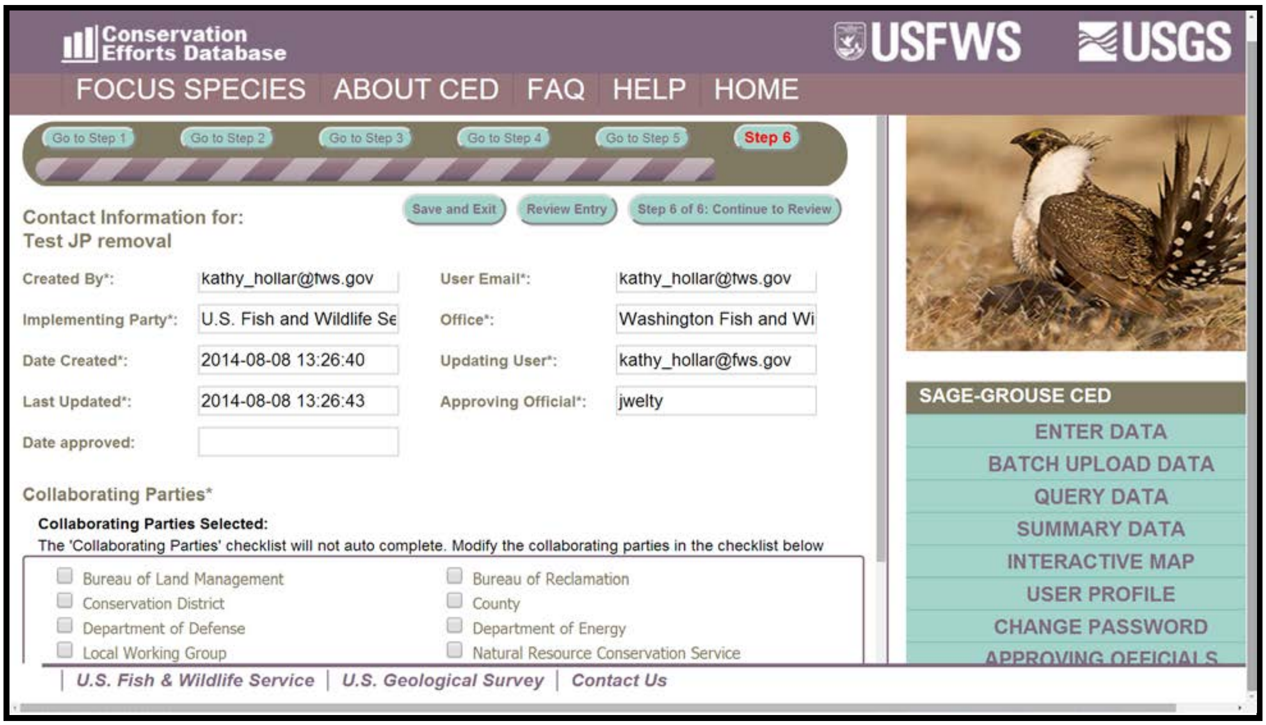
Step 6: Contact Information and Collaborating Parties

The 'Contact information' will be automatically populated based on the user registration information.

Record specific creation and modification dates will be automatically populated

The 'Date Approved' field will be automatically populated after your agency/organization's approving official approves the record.

Please select the Collaborating Parties that participated in your conservation effort. If you do not see one of your collaborating parties listed, check the box next to 'Other.' If there were no collaborating parties, check the box next to 'None.' Once you have completed this step, click 'Step 6 of 6: Continue to Review.'

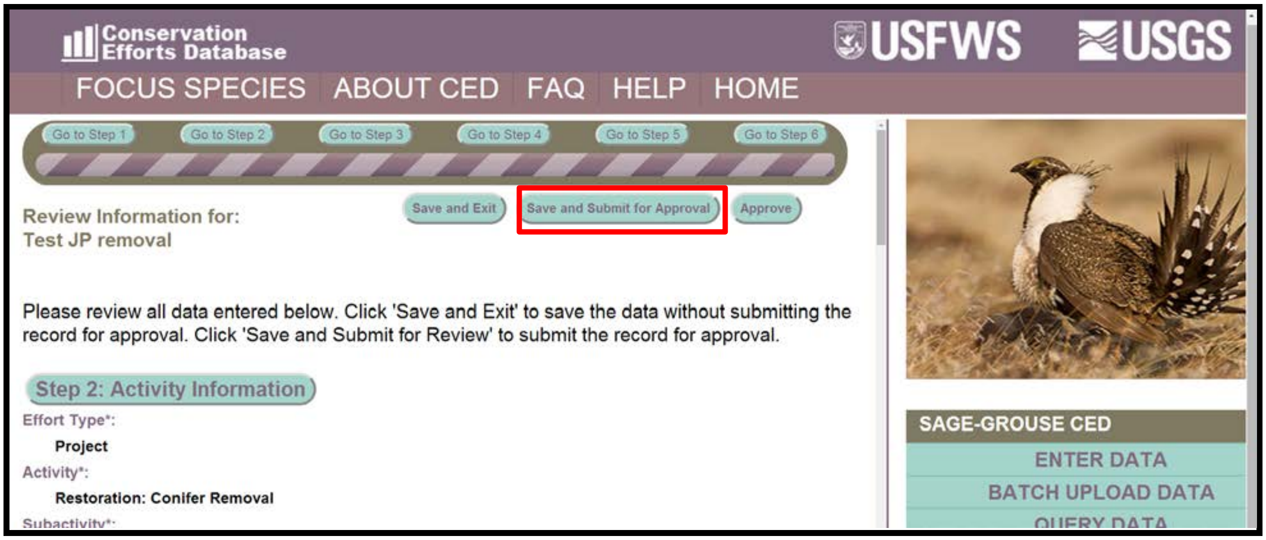


REVIEW & SUBMIT YOUR CONSERVATION EFFORT

Read through the information you've entered through the review panel and verify that all the information you've provided is correct. If you find that certain information is incorrect, click 'Go to Step _#_' and edit the incorrect field. From that Step, you can then click the 'Review Entry' button near the top of the page to return to the review panel.

Once you have verified that all the information entered is complete and correct, click 'Save and Submit for Approval' button to forward your completed project on to your agency/organization's designated

Approving Official for review. When you return to the View My Projects page at https://conservationefforts.org/sgce/viewprojects/, you will notice that the Entry Type code in the last column will be "2" for your submitted conservation effort. You will be notified via email when your project has been approved.



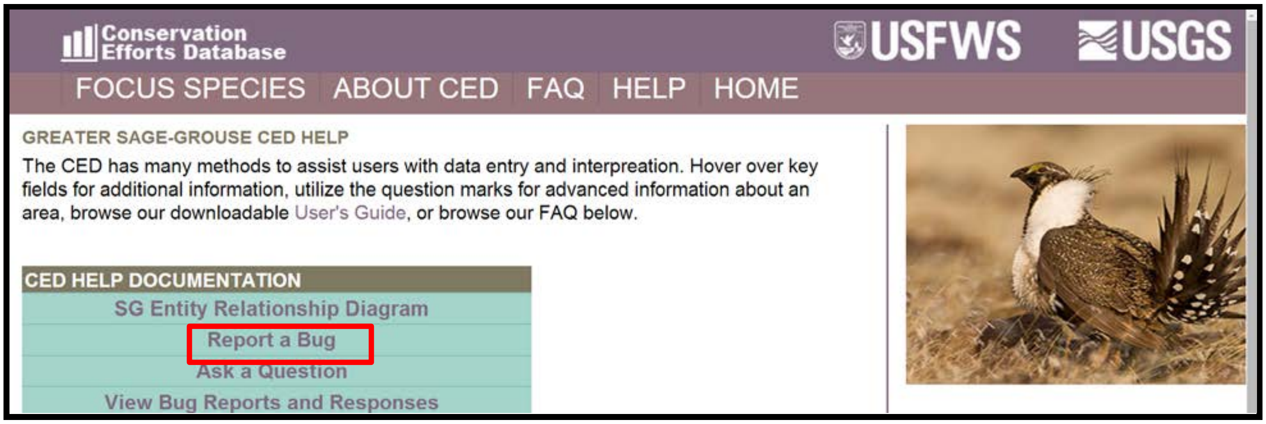
NEXT STEPS

You will receive an email when your submitted project or plan has been successfully approved. When you return to the 'View My Projects' page (https://conservationefforts.org/sgce/viewprojects/), you will notice that the 'Entry Type' code in the last column will be "3" for your approved conservation project or plan. Once you see that '3', congratulations - you've successfully submitted a conservation effort to the Sage Grouse CED!

If your project or plan was not approved, you will need to communicate and coordinate with the approving official in your respective agency/organization to make the necessary revisions, and resubmit the project or plan for approval.

SUBMIT A BUG REPORT

The CED is a new website, and as such, errors and glitches are bound to crop up during its initial implementation. Please help us by filling out a Bug Report whenever you find that something is confusing or a page is not functioning properly. Bug Reports are easy to create, take just a minute to submit, and are easily found under the HELP tab. Another option for submitting a Bug Report is by clicking the link here: https://docs.google.com/a/fws.gov/forms/d/1ugrfzbkNutUJda3LU2iyAYprvdl-Je_Ug9UGSCjfT_4/viewform



ASK A QUESTION

Do you have a question about the CED or require assistance? Please use our form to submit a question: https://docs.google.com/a/fws.gov/forms/d/1ugrfzbkNutUJda3LU2iyAYprvdl-Je_Ug9UGSCjfT_4/viewform. If you require an immediate response, you can also send an email to fw1sagegrouseced@fws.gov

BATCH UPLOAD

The CED has the ability to query from and upload existing datasets in bulk or batch format. While more efficient than single record data entry there are still steps that need to be taken.

- Contact the CED Team via email (fw1sagegrouseced@fws.gov) to request a batch upload.
- Work with the CED Team/USGS to determine which fields from your datasets will need to be transferred to the database. Once the fields have been determined, the USGS will work with data providers and/or stewards to create crosswalks for the batch upload process.
- After the data has been uploaded, each project or plan will need to be reviewed by the data provider, to identify gaps in the transferred data.

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APPENDIX A. GEOSPATIAL UPLOADING INFORMATION

Important Notes:

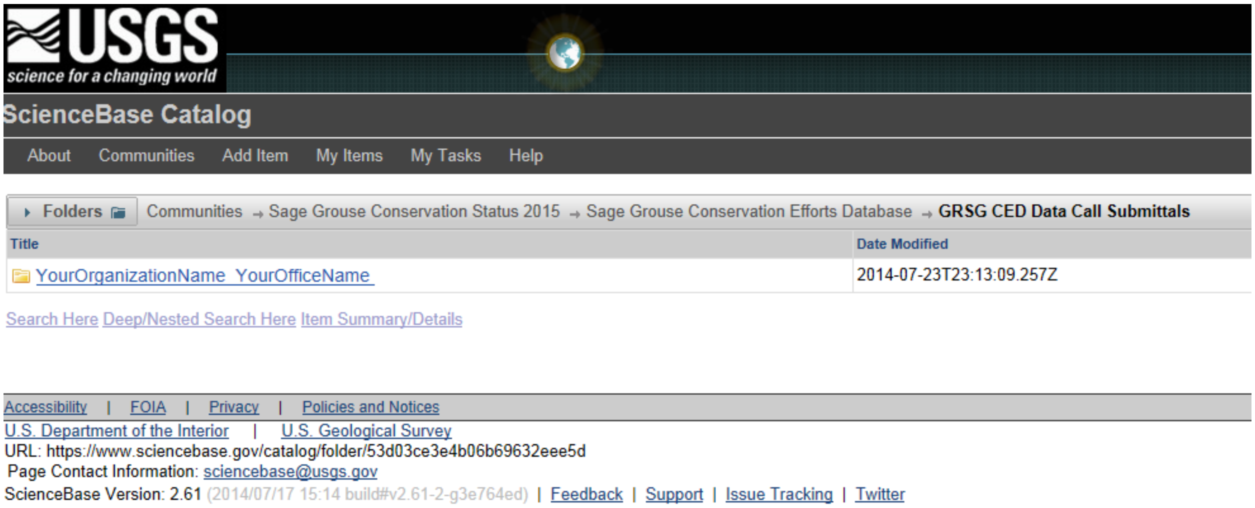
- Geospatial information is also being collected by the Service on ScienceBase for the general data call for the Greater sage-grouse. Please be sure that the conservation efforts that are meant for use as part of the CED are loaded on the GRSG CED Data Call folders and not the general data call folders.
- Before using these instructions, spatial data providers should have requested access by sending an email to CED_datacall@fws.gov with a list of email addresses that require access to the GRSG Data Call Spatial Data Submittal site, and your organization and office name. Enter “Spatial Submittals” in the email subject line. After that request is sent, an approval email will be returned login information and further instructions.

The purposes of the following instructions are to help state and other data providers upload Greater Sage-grouse CED data into ScienceBase. For assistance, questions, or comments, contact: CED_datacall@fws.gov.

1) ScienceBase folders that organizations can post their data to have been created in advance and given “read/write” access to identified individuals.

a. Navigate to the **GRSG CED Data Call Submittals** online folder at: https://www.sciencebase.gov/catalog/folder/53d03ce3e4b06b69632eee5d?_login& → log in

b. Open the folder that corresponds with your organization’s office. The GRSG CED Data Call Submittals folder will be accessible to those given access per the request email. Organization’s office folders will have been created in advance and given “read/write” access to known individuals.

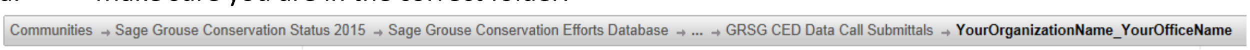


2) If the **GRSG CED Data Call Submittals** folder is not accessible, your organization's office folders is not visible, or others need access, request "read/write" access by emailing CED_datacall@fws.gov**.** In the email include your organization name, office name, and note other users (and their email addresses) that also need "read/write" access to the folder.

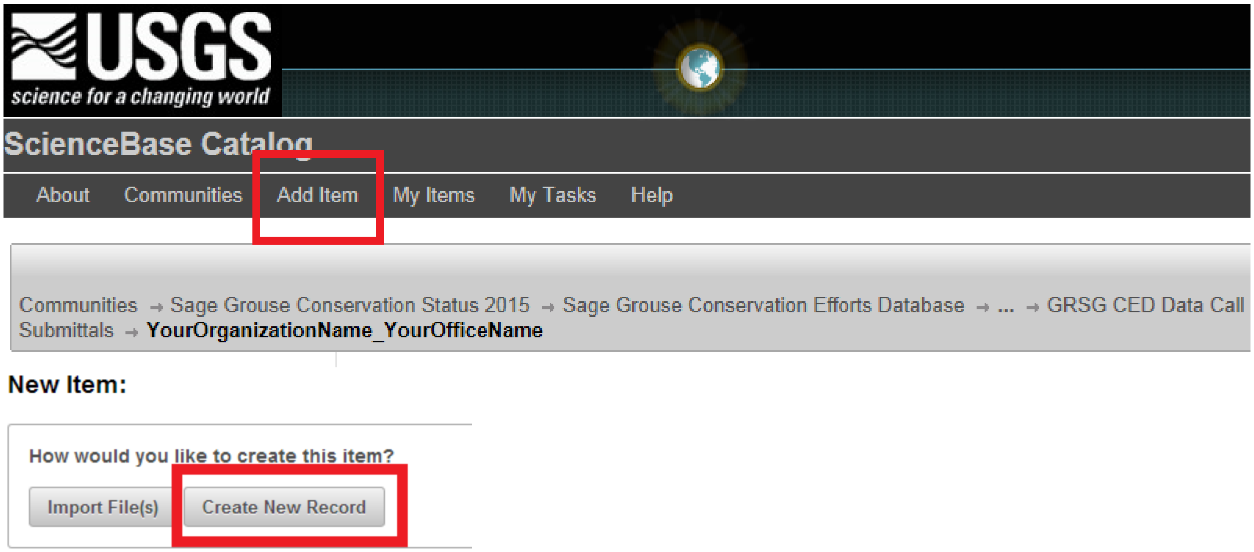
Email notification will be given when the request is fulfilled.

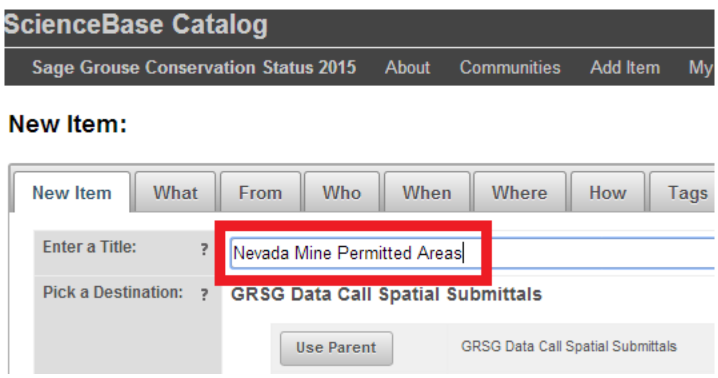
3) Create a new record for each file to be cataloged. **NOTE, if you have a Shapefile, with accompanying CSDGM (Content Standard for Digital Geospatial Metadata) metadata in the FGDC metdata XML format, go to step 12 (Shapefiles with metadata). If you have a Shapefile without metadata, or a geodatabase, continue here.**

a. Make sure you are in the correct folder:

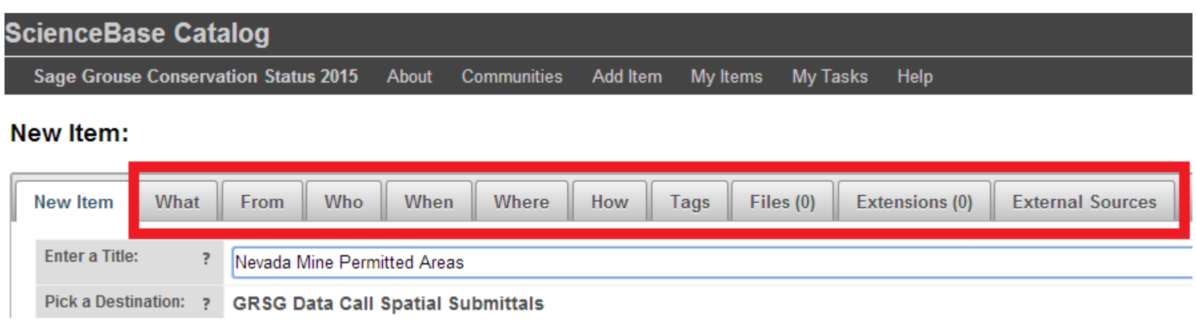


b. Click **Add Item** →click **Create New Record**, and give your data submittal a name in the **Enter a Title** text box that corresponds to the data being submitted.





4) Fill in the Item fields using the tabs across the top. See below for a description of what data should be included.



5) **What:** In the body, describe in as much detail as possible, what the spatial data you are uploading is, its intended purpose, any key points about how it was created, and any rights or credits that belong to it.

6) **From:** Where does the data derive from.

7) **Who:** Contacts for the data.

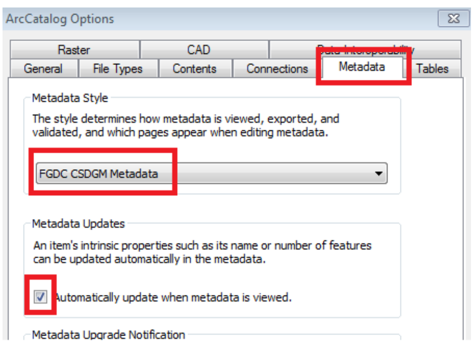
8) **When:** Temporal information for the data, NOTE, pay special attention to the formatting requirements for date data.

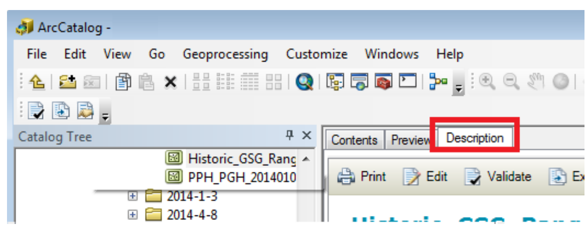
9) **Where:** How, Extensions, and External Sources tags are optional.

10) **Files:** File geodatabases must be zipped prior to upload. If you are uploading Shapefiles, select all of the files associated with the Shapefile, (shapefile corresponding files can be zipped up before upload to save repetitive loading of files, but click “Unzip” after upload).

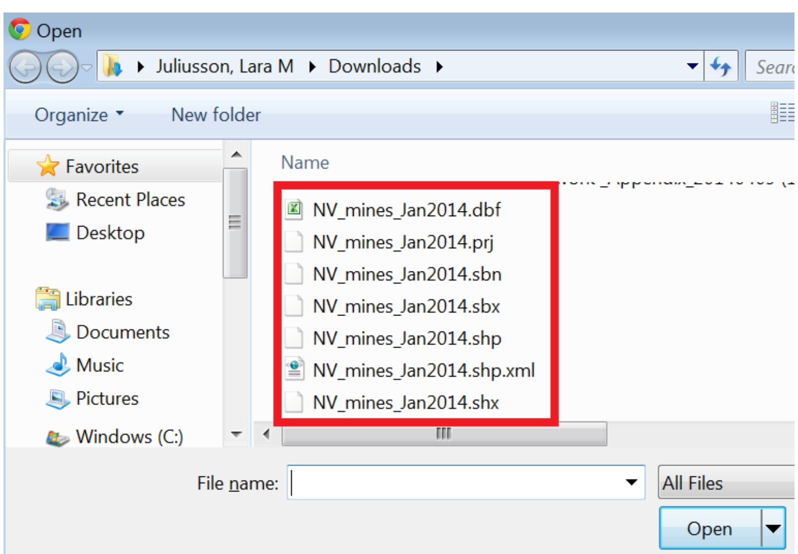
11) Click **Save** to save your record and uploaded files.

12) **Shapefiles (with metadata):** If you have shapefiles with metadata in an .XML format, you can add your files here and descriptive fields in the What, From, Who, When, Where, etc. will be autopopulated. Verification of **FGDC CSDGM Metadata** can be accomplished by ArcGIS Desktop’s Arc Catalog software. Confirm the metadata style is set to “FGDC CSDGM Metadata” and the box for “Automatically update when metadata is viewed” box is checked in the ArcCatalog Options menu (ArcCatalog →Customize →ArcCatalog Options). View the shapefile’s metadata in ArcCatalog after confirmation.

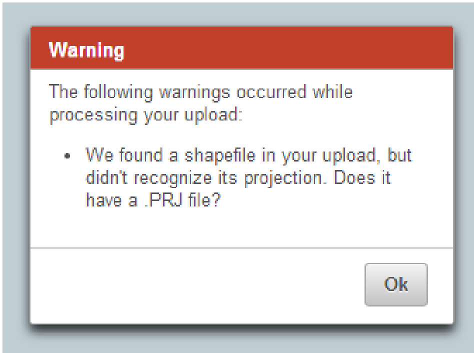




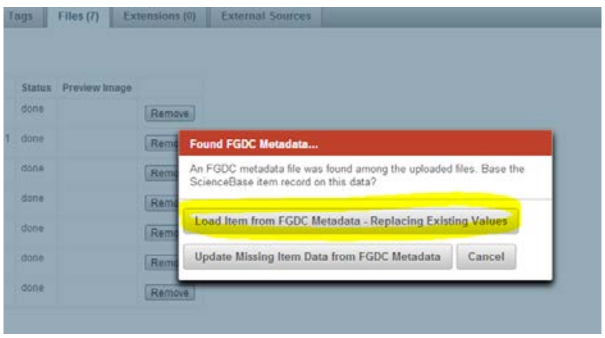
Select all of the files associated with the Shapefile, (shapefile corresponding files can be zipped up before upload to save repetitive loading of files, but click “Unzip” after upload).

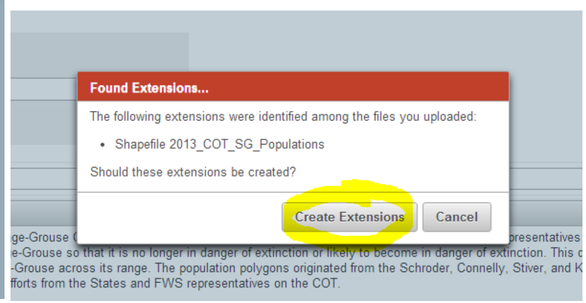


It is strongly encouraged that you include a projection file with all spatial data submissions!



If prompted, Click “Load Item from FGDC…” and If prompted, Click “Create Extensions”





13) Continue to add items until done. Note that a mixture of shapefiles and zipped files can be added. Be sure to add metadata for all files uploaded without metadata included in an .XML file using the What, From, Who, When, Where, etc. fields. Click **Done Uploading** when you are finished.