Greater Sage-grouse Conservation Efforts Database Help Document Version 1.1

A Living Document That Will Be Refined With Use

U.S. Fish and Wildlife Service
September 30, 2014

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WELCOME TO THE CED

Thank you for taking time to learn more about the CED. This help document is one of several features designed to help new CED users register for the website and enter data. Additional resources can be found within the CED Help link (https://conservationefforts.org/sgce/help/) and include an FAQ, help videos, batch upload instructions, and table structure and documentation. If you have questions or comments that cannot be answered via the help resources please do not hesitate to contact us.

GETTING STARTED

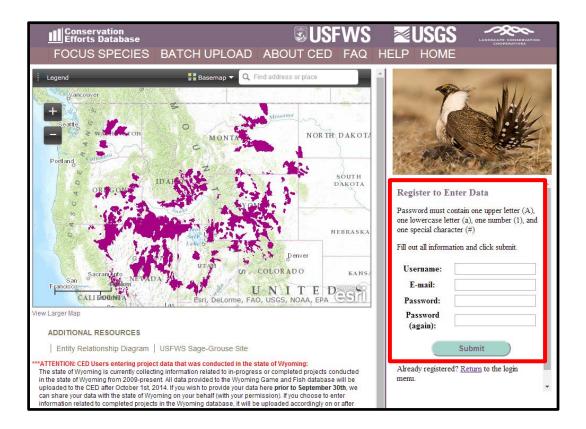
In order to enter data into the Conservation Efforts Database (CED), agencies/organizations must first provide information on their agency/organization and office structure for the CED pre-registration process. This step is necessary to ensure the security of the site and of each record entered into the CED. This pre-registration process is used to complete 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:
 - o the data provider that created the project,
 - o select employees within the data provider's office, or
 - o 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.

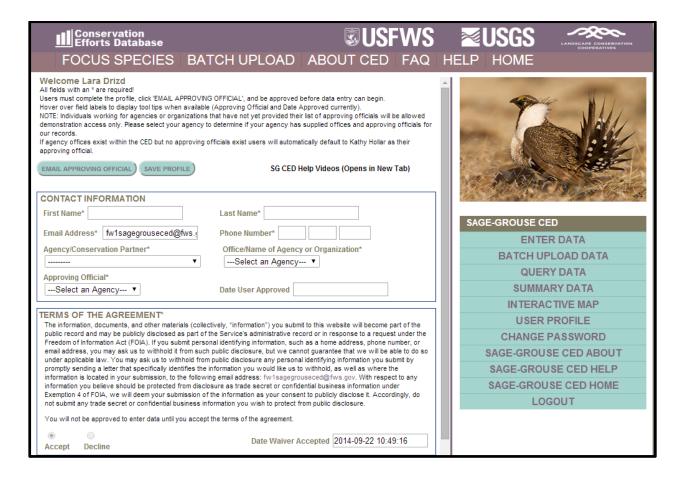


ENTER PROFILE INFORMATION

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

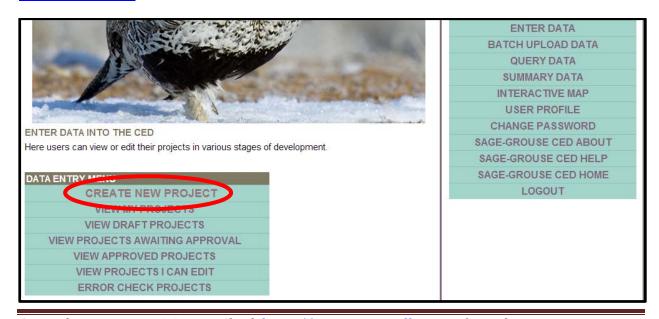
When you log in for the first time, you will automatically be directed to the 'Main Page' where you will be asked to provide your contact information (see screenshot below). Fill out all required fields marked with an asterisk (*). Approving officials should have already been designated for your agency/organization, and will appear in a drop-down menu once your agency/organization or office is selected. 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 multisagegrouseced@fws.gov for assistance. In addition, if you do not see your office within the drop down list you can select DEMONSTRATION USER ACCESS ONLY. Kathy Hollar will automatically be given as your approving official. Records entered in this test capacity can be converted from test records to real records when your profile information is updated. Please contact the CED for further assistance with this step.

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 from your approving official to enter data for 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 (*go to:* https://conservationefforts.org/sgce/). After logging in, select 'Enter Data' from the panel on the right side of your screen to access your data entry menu. To enter a new conservation effort (project or plan), select 'Create New Project.' See Entering a Conservation Effort for further instructions.



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

While entering your project data, you will notice small red text near the top of the page (on Step 2 only) that says 'Mark this Effort for Deletion.' Check the box to next to the red text and click 'Save and Exit.' An email will be sent to your approving official. The approving official can select 'Approve' to submit a CED effort to the CED administrators for final deletion.



ENTERING A CONSERVATION EFFORT

Conservation Effort Name & Completion Status

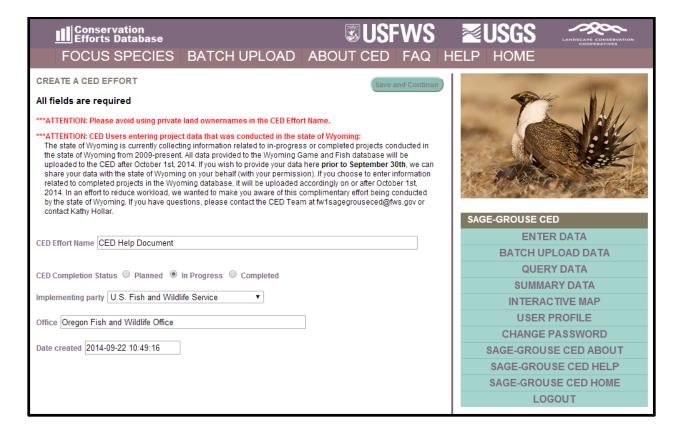
Indicate the name of the conservation effort (either a plan or a project) using fewer than 50 characters. Effort names cannot be duplicated within the CED. Useful tips for a unique name include an effort name (often a geographical landmark), the type of effort, and the year the effort began.

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. While users can edit these fields if necessary, we recommend using the default settings.

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.



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 Zipped 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. For additional instructions on working with the spatial data please see our video help files (https://conservationefforts.org/sgce/helpvideo/).

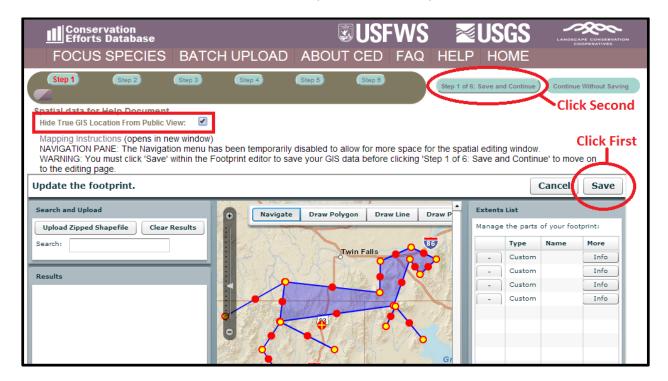
To enter the information manually, zoom to the area of the map where the conservation efforts took place or are planned to take place, select 'Draw Polygon,' 'Draw Line,' or 'Draw Point' at the top of the map, and click to enter a shape. If you are drawing a line or polygon, you can finish your shape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

To support landowner privacy and prevent the true locations from being visible to the public, click the check box next to 'Hide True GIS Location from Public View' (see screenshot below). This will offset the spatial data that you load on any publically accessible map while still allowing the USFWS to have access to the original data for modeling purposes.

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 (see screenshot below). If you click the turquoise button before the white 'Save' button, all of the spatial information you have entered will be lost.



Once you click 'Step 1 of 6: 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 display the appropriate metrics and potentially other fields that need to be completed based on your Subactivity selection.

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

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. However, for standard data entry, click 'Step 2 of 6: Continue to Step 3.' You will automatically be directed to Step 3.

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. The site will warn you of any attempt to leave the data entry page without first saving so that you can return to the page without losing any data.



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 or delete your files from this page (see screenshot below).



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

Step 4: Location Information

The Western Association of Fish and Wildlife Agencies (WAFWA) Zones, Sage-grouse Populations, States, Counties, and Hydrologic Unit Code (HUC) 12 Zone 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 as you will not be able to pass the error check without all location information fields completed.

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, implementation status, 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 question 3a.

Please read through the questions in Part 2 or 3 and select the appropriate response for your conservation effort. Part 2 is required if the effort implementation status is not "Completed". Part 3 is required if the effort is highly likely to be effective, but has not been in place long enough to determine, or if the effort is unlikely to be considered effective in Part 1 Question 3.

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

Part 2: Implementation Information ***REQUIRED***	
For actions not yet implemented, is there a high level of certainty that:	
 a. The activity will be implemented. Yes No b. The implementing party has the legal authority to conduct the activity. 	
 Yes No c. Financial, staffing, and administrative resources necessary to carry out the conservation effort are available. Yes No 	
 d. Regulatory and/or procedural mechanisms are in place to carry out the efforts. Yes No 	
e. All Federal/State/Local legal project compliance requirements have been met or are reasonably certain to be met. Yes No	
f. If voluntary participation is needed, are incentives adequate to ensure the level of participation necessary to carry out the conservation effort. Yes NO N/A	
Part 3: Effectiveness Information	
For actions that have not been deemed effective (e.g. programs/actions only recently implemented), does the action:	
 a. Describe how the conservation effort reduces the threats. Yes No 	
 b. Provide incremental objectives and dates for achieving them. Yes No 	

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.

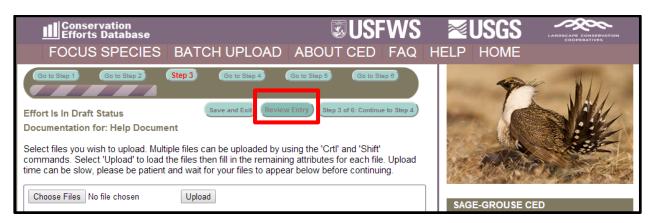
The 'Date Approved' field will be automatically populated after your agency/organization's approving official approves the record.

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.'

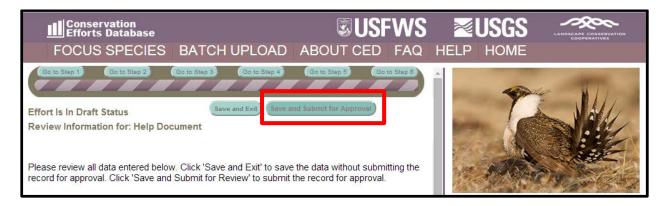


REVIEW & SUBMIT YOUR CONSERVATION EFFORT

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. In the review pane all possible fields are displayed. If the field was not visible during data entry it is not required and can be left blank.



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.



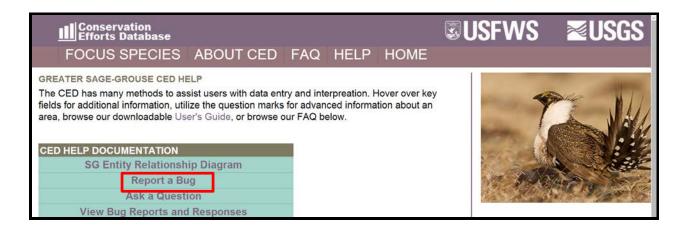
NEXT STEPS

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, require just a minute or two to complete, and are easily found under the Help tab. You may also click the link provided here: https://docs.google.com/a/fws.gov/forms/d/1ugrfzbkNutUJda3LU2iyAYprvdl-
Je Ug9UGSCifT 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.

Visit the Batch Upload page to learn more: https://conservationefforts.org/sgce/batch_upload/