

WELCOME!

Congratulations, you're a **Caterpillars Count!** Site Manager! This means that either

1. you set up a **Caterpillars Count!** site yourself,
2. you have been added as a manager to help oversee participation at the site,
3. you have inherited the **Caterpillars Count!** site from someone else, perhaps someone who is no longer associated with the site.

Regardless of which scenario applies to you, this guide is designed to familiarize you with the core responsibilities and capabilities of a Site Manager.

If you haven't already, please [sign up](#) for a **Caterpillars Count!** account. If you are being added as a new manager of an existing site, an existing manager will need to follow the instructions at the end of this document.

SURVEY BRANCHES and TAGS

The project involves participants (visitors, staff members, interns, students, etc.) conducting arthropod surveys on tagged branches.

One responsibility of a Site Manager at the beginning of a season (i.e. late spring) is to **ensure that all survey branches are still tagged**.

If **tags have fallen off**, or are no longer legible, you can print new ones from the [Manage My Sites](#) > *Print Tags* page. Laminating the tags or folding them in packing tape can help them weather the elements for longer.

If a **survey branch is missing** (perhaps a tree fell), or if you can't find a branch, you can simply select a new survey branch in the vicinity, ideally of the same plant species. Go to [Manage My Sites](#) > *Edit Survey Plants*, and select the code for the branch you are reassigning. Re-enter the species name and check the box that says "I am moving this code to identify a more suitable tree." Print a new tag. General tips for branch selection can be found [here](#).



BQB

Plant Species:

American mountain-ash

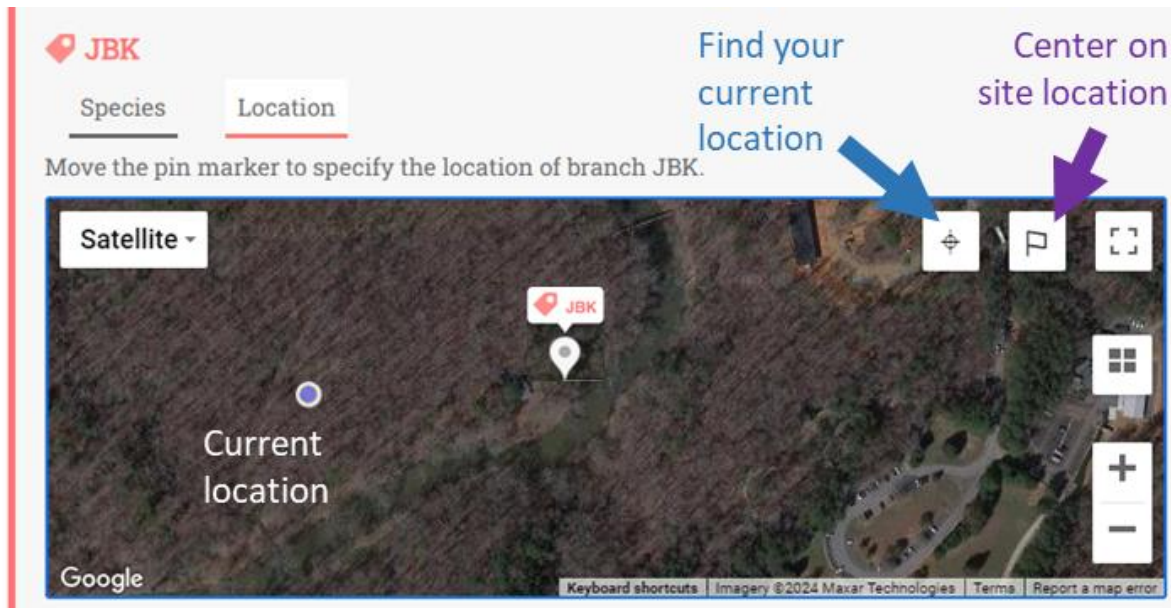
☐ This plant is coniferous. ?

Location change:

☐ I am moving this code to identify a more suitable tree. ?

Add the location of your survey trees. Go to the [Manage My Sites](#) page of the website, and then go to *Edit Survey Plants*. You have the ability to map your survey branches using the *Location* tab. A tag with that branch code will initially appear on the map located at the site's central coordinates. Drag the tag, or double-tap on the map, to move it to the correct map location. If you are outside standing by the actual survey branch, tap the target icon and a small blue dot will show your current location on the map based on your phone's GPS. You can then zoom in to

place the tag in the center of the blue circle for maximum precision. See the figure below and the [Site Setup](#) document for more details.



EDITING SITE INFORMATION and PASSWORD

In order for participants to submit surveys online or through the mobile app, they need to provide a **site password**.

But if you are inheriting the **Caterpillars Count!** site from someone else, you might not know it!

You can easily reset the site password to whatever you like by going to [Manage My Sites](#) > *Edit Site*. Once you've reset it, be sure to tell the new password to all volunteers and participants who plan to submit data at your site.

You can also edit the *Site Name* and *Description* here as well if necessary.

MANAGING PARTICIPANTS

If you are inheriting the **Caterpillars Count!** site, it's important to find out who was actually conducting the surveys in past years. Is there a local group of students or naturalists, was it a staff member or intern? Can you find their contact info?

These previous participants may be able to help you better understand project logistics, and also help train new participants. In some cases, the participants may self-organize, but it may be helpful to have you or a staff member coordinate assigned survey days or survey branches.

Consider holding a "Citizen Science Day" type event once a year where you advertise the project and solicit new interested participants. We have various arthropod identification and training resources [here](#) to help with such an event.

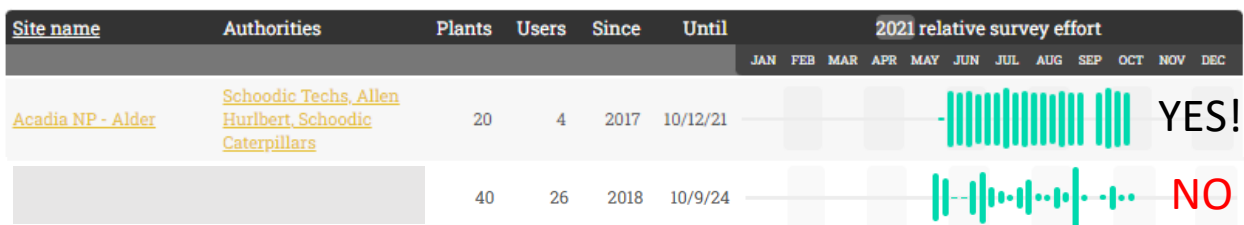
MANAGING DATA

Ensuring that submitted data is of high quality is critical for all future research and analyses that are done with the **Caterpillars Count!** dataset.

You can help in three ways:

First, ensure that the expected number of surveys are being conducted each week or month. Get a quick view of how many surveys (reflected in the height of the green bars) have been conducted each week from the [Manage My Sites](#) page. If the bars are uneven in height from week to week, check in with your participants to make sure that all branches get consistently surveyed.

REVIEW SURVEY EFFORT:



Second, every few weeks it can be helpful to scan the submitted surveys using the [Manage My Surveys](#) page to review what's been found by your participants. Some surveys may be flagged because they contain unusual values for length or abundance. To view flagged surveys, go to **Manage My Surveys** and click on the yellow **Filter Surveys** button. There, you can select the Flagged Surveys that *Need Review*. Then click the **Apply Filters** button at the bottom.

BATCH DELETE FILTER SURVEYS

USER: John Smith

ARTHROPOD GROUP: Not selected

MIN. LENGTH (MM): 0

FLAGGED SURVEYS: Show All, Needs Review, Accepted, Rejected

SITE: Not selected

DATE: Month Day Year

APPLY FILTERS

You will see a list of surveyed branches, and after clicking “Show Arthropods Found” you will see results displayed like this:

CBQ: Schuylkill Center (PA), Circle 2, Sweet crab apple 11:56am

JOSE DUENAS VISUAL 50 DRY LEAVES 7cm LEAF LENGTH LIGHT (6-10%)

1 13mm other

*Adult spotted lanternfly, which a camper promptly killed

Hide 1 Arthropod Found

As Site Manager, you have the ability to edit any of the survey data from your site. For example, in the survey displayed above a user observed a spotted lanternfly, but submitted it as “other”. By clicking on the pencil/paper icon at the top right of the survey card, you could change “other” to “leafhopper” (the correct designation in this case), or edit any of the other fields as necessary.

Third, the data visualization tools on the [Maps and Graphs](#) page can be useful for visualizing patterns in what’s being found and how that is varying from week to week. You can find a detailed guide to using these tools [here](#).

ADDING NEW MANAGERS

You can add others as Site Managers to share in the responsibility of editing site information, printing branch tags, and managing surveys. Have the new person create a **Caterpillars Count!** account [here](#). Then you may go to [Manage My Sites](#) > *Oversee Managers*. Enter the e-mail address they used for their account, and they will then receive a confirmation email.

This is especially important if you will be ending your association with the **Caterpillars Count!** site--**please identify someone else to take over as the Site Owner if you leave.**

On the *Oversee Managers* page, you would “Resign” from being the Site Manager, and will see a dialog box like the one at right.

Choose whether to resign completely (“*No Affiliation*”), or to demote yourself such that you still have managerial abilities except for adding other managers (“*Low Management*”).

Next, select who will be the new site owner.

What position would you like to assume at this site now?

☒ High Management
☐ Low Management
☐ No Affiliation

Which approved manager on your staff would you like to replace you as site owner?

☒ Grace Di Cecco
☐ Colleen Whitener
☐ Indigo Edwards

Cancel RESIGN

OTHER RESOURCES

You can find many resources for training new participants—including arthropod identification, survey protocol instructions, and tips for exploring your data—on the [Resources](#) page.

You may also find our [Frequently Asked Questions](#) page to be helpful. If you still have questions, feel free to post a query to the **Caterpillars Count!** [Google Group](#).

Thank you for being a Caterpillars Count! Site Manager and overseeing the collection of this valuable biodiversity monitoring data!

