
OBSERVATION



OBSERVATION USER MANUAL

Natural Resource Information Portal
(<https://nrinfo.nps.gov>)

APRIL 2011

OBSERVATION



Amendment History

Rev	Description	Author	Date

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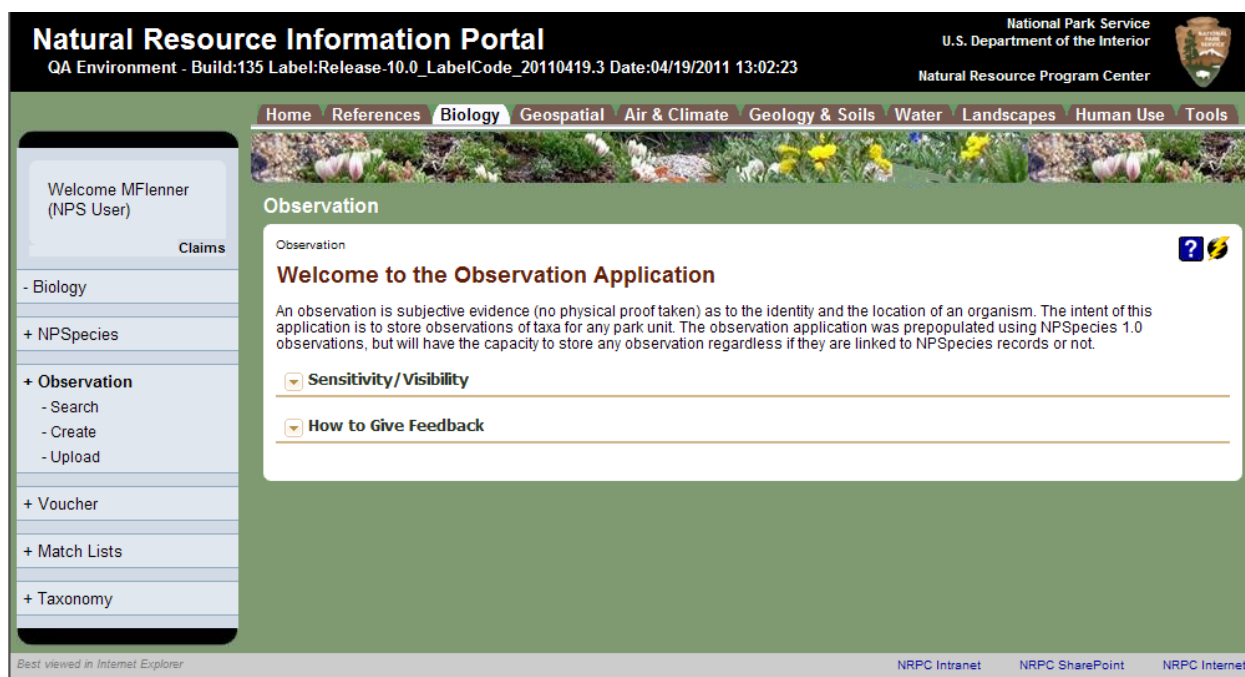
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1 Introduction

This document is the comprehensive guide to all of the functionality for the Observation Application. It will be regularly updated as new functionality is added or changed. The glossary, data dictionary, and frequently asked questions may be found in the appendices of this document.

The Observation Application can be accessed from the NRInfo Portal at <https://nrinfo.nps.gov/Home.mvc>. Once here click on the Biology tab. All the biology applications will appear on the left navigation menu. Clicking Observation on the left navigation menu will take you to the Observation Welcome page. This Welcome page provides basic descriptive information about the application.



2 Observation Application Basics

National Park Service Natural Resource Challenge established in 1999 required a baseline inventory of all vertebrates and vascular plants in all national parks with significant natural resources. As part of the data collection, species observation records were entered as supporting evidence of a species existence at a park. The observation data was initially part of the NPSpecies database and application when it was first made available in 2000. During the NPSpecies redesign the observation data and application was separated from NPSpecies and made into its own stand alone application.

2.1 What is an observation?

An observation is subjective evidence (no physical proof taken) as to the identity and the location of an organism. The intent of this application is to store observations of taxa for any park unit.

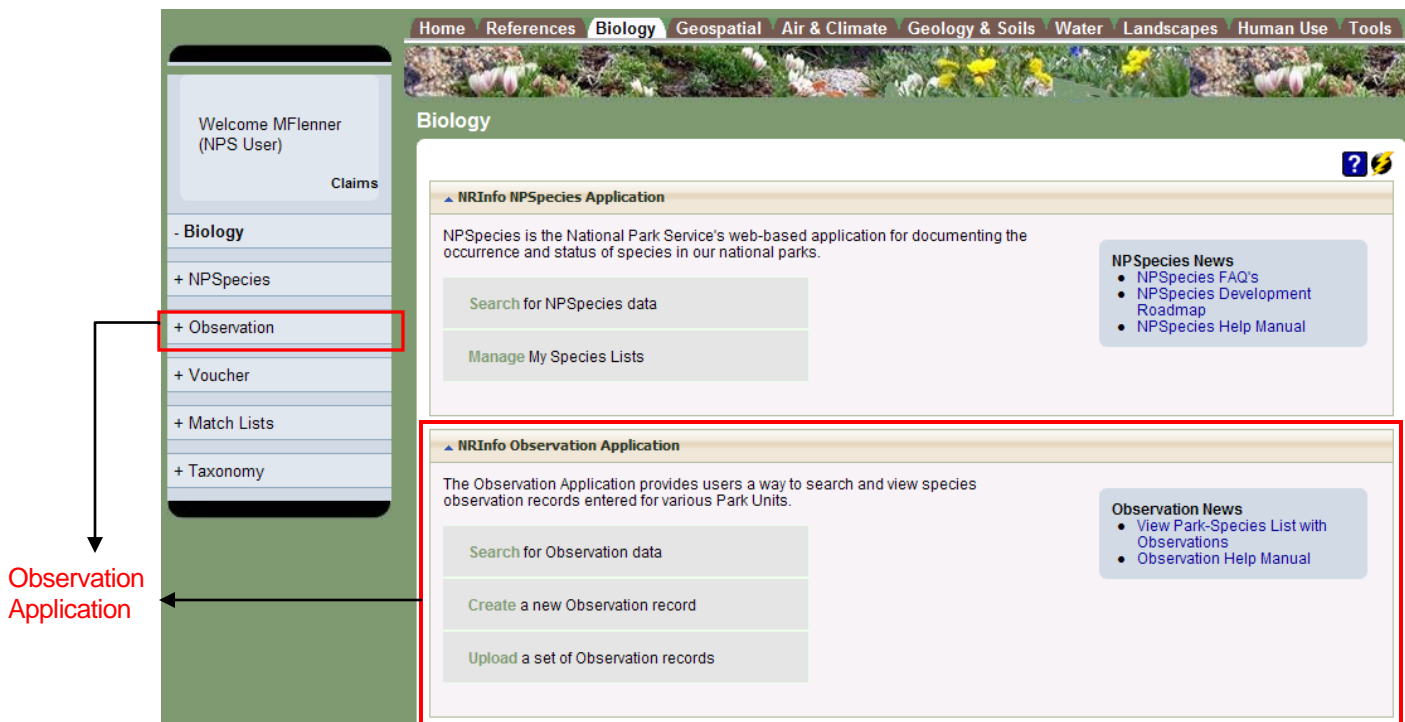
2.2 What is the Observation Application?

The observation database stores observation records of taxa for any park unit and the application makes these records searchable and accessible via the NRInfo Portal. The observation records are used as proof that a species exists at a particular park and were originally stored with the NPSpecies species list and park status

data. The data records are metadata for a recorded observation, which was made at or near the park. For those with the appropriate permissions the observation data can be added to, and edited.

2.2.1 Where do I find the Observation Application?

- 1) From the main NRInfo Portal Page (<https://nrinfo.nps.gov/Home.mvc>) click on the Biology Tab.
- 2) The Biology Tab has a number of applications listed; Observation is the second from the top, both on the left navigation bar and on the main part of the Biology page.
- 3) On the main Biology page in the Observation Application Panel there are links to search observations, create observations and upload observation. You can also access the main observation landing page by clicking on Observation on the left navigation menu.



2.3 What is the scope of the Observation Application?

Only data about observations recorded on or possibly near parks are stored. The application allows users to search, add and edit these observation records and is used by the NPSpecies application to link observation records with species records for a park.

2.4 What are the supporting applications used with the Observation Application?

The Observation Application depends upon several other independent applications:

1. Unit – stores all unit names and their relationships. Units include national park system parks, networks, regions, programs, and offices.
2. Taxonomy – stores all scientific and common names in addition to relationships between names.
3. Template and Reporting – generates all data viewed in tables and supports the download mechanism for the data displayed in those tables.
4. Identity Management – stores minimal information about users and their permission to all applications on the NRInfo Portal.

For more information about these applications see their user manuals.

In turn the observation application is one of the support applications for NPSpecies, providing records of observations that are used to prove species existence at a park.

2.5 Who manages observation data?

When observations were integrated with NPSpecies the NPSpecies Points of Contact (POCs) were stewards of the observation data along with the species data. They may not have entered the data themselves, however they do police who does data entry. For this reason POCs for NPSpecies will all continue to be POCs for the observation data as well.

For data errors found in Observation, NPSpecies or questions about a species in a specific park, please contact the appropriate POC. Click here to [locate the appropriate POC](#).

2.6 How were data entered?

Data were migrated from the original NPSpecies 1.0 database December 2010. Data within NPSpecies 1.0 were entered various ways over the years. Some data were entered as a result of data mining books, reports, and data sets from park historical records. Other data was entered as a result of targeted field inventories for particular groups of species.

Data mining historic books, reports and field data resulted in species identified with historical taxonomy used at the time of the observation. This should be kept in mind as you search the data for desired species because you may not find the species listed with the most recent taxonomic accepted name.

2.7 What is the quality of the information?

The observation records are not an exhaustive list of all observations taken at a park. In the past the only data entry requirement was to enter the park and species no other information was required, and was not always available. This means that the data is of varying qualities and completeness. Data migrated from the older NPSpecies 1.0 database was marked with a lifecycle of legacy. We ask that POCs and park personnel familiar with the data review these records. Records that are more complete and offer useful information should be moved to a lifecycle state of active. Please help us identify these data gaps and errors by contacting us by email at NRInfo_Feedback@nps.gov.

2.8 What is location identifying information?

Many observation records also have information that indicates the location that the observation was made, this includes actual x,y point location information, detailed descriptive text which may include Township, Range and Section information, and detailed habitat descriptions. Basically, any information that may make it possible for someone to find the location where an observation was made was marked as location sensitive.

2.8.1 Who can see location identifying information?

Currently, the observation application records are ONLY visible to individuals with a NPS domain login account (NPS Users). All NPS Users will be able to see the entire set of information (including location information) for all observation records designated as appropriate for NPS staff and the public. Some observation records will require a user to have further permissions before they can see the observation record. If the observation data is made viewable to the public, all location identifying information will be hidden and only records with a non-sensitive designation will be viewable to the public.

3 Searching and Viewing Observation Data

The observation data is fairly simple. There are currently only two search options and two different views of the data. The observation data search results are shown in a table view with a small set of identifying fields shown.

Detailed information for a specific observation record can be seen in the observation profile view which is accessed by clicking on a specific observation record in the search results table.

3.1 How do I search for observations?

There are two search options quick search and search by code. Observation quick search requires a scientific name and the park that the observation was seen in. Search by code requires one or a set of the observation code(s) that are the unique identifier for an observation record. The search by observation code is similar to the search by reference code in the Reference application.

3.1.1 Observation Quick Search

The screenshot shows the 'Observation Search' interface. At the top, there is a 'Search' label and a help icon. The main heading is 'Observation Search'. Below this is a 'Define Search Criteria' section with the following fields:

- Search Type: Quick
- Unit: Acadia National Park (ACAD)
- Taxonomic Category: All
- Name Type: Scientific
- Name: Buteo

A 'Search' button is located at the bottom right of the form. At the bottom of the page, there are links for 'NRPC Intranet', 'NRPC SharePoint', and 'NRPC Internet'.

To search using the observation quick search follow these steps:

- 1) Click on Search under the Observation Application Panel in the Biology Tab.
- 2) The default Search Type will be set to Quick.
- 3) Select the park Unit that you want to find an observation for.
- 4) Optionally, select a specific Taxonomic Category (this can be left as all).
- 5) Select a Name Type to search, the options are Scientific, Scientific Name with Authority and Common.
- 6) Type in a name or partial name in the Name text box. You must enter at least 2 characters in the Name text field.
- 7) Click the Search button to initiate the search.
- 8) A Refine Search table will appear with a list of taxon names that could match the name string you typed in. Any name in the Refine Search table that has observations for the park you select in step number 3 will be highlighted in blue.

Observation

Search ? ⚡

Observation Search

Define Search Criteria

Search Type: Quick

Unit: Acadia National Park (ACAD)

Taxonomic Category: All

Name Type: Scientific

Name: Search

[Refine Search](#)

Select Desired Scientific Name

Scientific Name	Common Name	Category	Rank	Classification Source	Code
Buteo jamaicensis	Red-tailed Hawk	Bird	Species	Integrated Taxonomic L...	175350
Buteo lagopus	Roughleg,Rough-legge...	Bird	Species	Integrated Taxonomic L...	175373
Buteo lineatus	Red-shouldered Hawk	Bird	Species	Integrated Taxonomic L...	175359
Buteo platypterus	Broad-winged Hawk	Bird	Species	Integrated Taxonomic L...	175365
Buteo	Buteonine Hawks	Bird	Genus	Integrated Taxonomic L...	175349
Buteo albigularis	White-tailed Hawk	Bird	Species	Integrated Taxonomic L...	175360

Page 1 of 1 Displaying results 1 - 61 of 61

Hyperlinked Names

- 1) Click on a highlighted scientific name. A results table with observation records for the taxon and the park you choose will appear.
- 2) NOTE: If there are no observation records for your particular species name of interest in a park than that name will not be highlighted. You may also not see observations for a particular species in a particular park if you do not have permission to see those observations.

3.1.2 Observation Search By Code

The screenshot shows the 'Observation Search' interface. At the top, there is a 'Search' label and a help icon. Below this is the title 'Observation Search'. A section titled 'Define Search Criteria' contains a 'Search Type' dropdown menu set to 'By Observation Code' and a 'Code' text box containing '147200, 147201'. A 'Search' button is located to the right of the text box. At the bottom of the interface, there are links for 'NRPC Intranet', 'NRPC SharePoint', and 'NRPC Internet'.

To search using the observation search by code follow these steps:

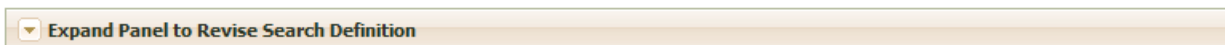
- 1) Click on Search under the Observation Application Panel in the Biology Tab.
- 2) The default Search Type will be set to Quick. Click on the Search Type pull down to change the search type to By Observation Code. The search definition options will change.
- 3) In the Code text box enter one or more observation code values you are interested in looking at. If you enter more than one code separate the codes by a comma.
- 4) Click the Search button to initiate the search.
- 5) A results table will appear with the observation record or records that you entered codes for. If there are no matches to the codes you entered or you do not have permission to see the records for the codes you entered the following screen will be shown.

The screenshot shows the 'Observation Search' interface after a search. It features a section titled 'Expand Panel to Revise Search Definition'. Below this is a 'Search Results' section with a 'Notifications' panel. The notification message reads: 'Please Note: No observation records found'. The interface also includes a 'Search' label and a help icon at the top, and links for 'NRPC Intranet', 'NRPC SharePoint', and 'NRPC Internet' at the bottom.

3.2 How do I run another search?

Once you have run a search and you are ready to run another one select the Expand Panel to Revise Search Definition at the top of the page. You do not need to click the internet browser's back button. Revise your search criteria and click the 'Search' button again.

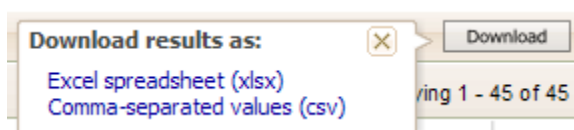
Search



3.3 How do I download a set of observation records?

The list of resulting observation records from a search does not have the complete set of fields and values that are stored for each observation record; however you can download the set of records and data that is displayed.

1. First you must execute a search and return results. See 'Observation Quick Search' or 'Observation Search By Code' as an example.
2. To access the download options click on the 'Download' button icon in the upper right corner of the results table.
3. To download the results click on one of the download options in the list that displays to save results to a file.
4. Select open or save to save this file on your computer.



3.4 How do I print an observation results table?

To print a list of observations from the results table you must first download the list into MS Excel or similar application and then print using MS Excel. It is advisable to format the file prior to printing to meet your needs, such as setting up the page orientation, adjusting column widths, wrapping disclaimer text. For more help using MS Excel, please refer to the Microsoft website.

3.5 How do I see a complete observation record?

Search results for observation quick search and search by code only show a table with a subset of fields and values that are stored for each observation record. To view an entire observation record you must go to the observation profile view.

- 1) Run a quick search or search by observation code (follow steps in sections 3.1.1 and 3.1.2)
- 2) When the results table displays, look over the table of results to find the record you would like to view in more detail.
- 3) Click on the observation code of the record you have chosen, this will open a new browser window with the observation profile view of the record you have clicked. You will be able to go back to the results table view to look for other observation records that you would like to view in more detail because the results table view is preserved in the original search browser.
- 4) The observation profile has 3 tabs of data, the Events tab, Location Tab and Record Information Tab. There is a data dictionary of all the fields for an observation record in the appendix of this document, go there for more specific information about each field.


4 Search Tips and Tricks

4.1 Enhanced Text Searching

Enhanced text searching is available for some applications in the portal as well as for some web services. With enhanced text searching, input of text as part of a search has certain default behavior. The default search behavior has these elements:

- Searches are case-insensitive.
- Searches are for whole word matches only.
- Extra white space (before, after and between words) does not affect the search results.
- All words entered will be required to be present in the field being searched (equivalent to an AND search).

The search operators (special characters) in the table below can then be used to modify the default search behavior in the portal.

Name: 

Operator	Description	What it does	Examples	Tips for portal use
*	Wildcard	Substitutes for any number of characters, including spaces, punctuation or zero characters	*alces alce* al*es	Can be used before, after, or in the middle of a search string. Search strings of few letters, beginning with the wildcard (for example, *us) may be unsuccessful because of long processing time.
?	Single character wildcard	Substitutes for exactly one single character, including a space or punctuation (but not zero characters)	al?es ?lces alce?	Can be used before, after, or in the middle of a search string.
" "	"Phrase search"	Retrieves two or more words in the order specified.	"canis lupus alces"	Wildcards may be used within quotes, but may not return intended results.
^	Field starts with	Requires that the field must start with the specified text string	^canis ^canis* ^"canis lupus"	Use of ^ directly followed by * is not recommended because results are then no longer restricted to the first word in the field (e.g. ^*ruba)
\$	Field ends with	Requires that the field must end with the specified text string	\$canadensis \$*upus \$"alces gigas"	Use of the \$ operator with a text string ending with a wildcard is not recommended because then the results are not limited to the last word of the field (e.g. \$alu*)

=	Entire field exactly matches	Requires that the field must exactly match the specified text string	=lontra ="lontra canadensis"	Do not use the wildcard or the question mark with the = operator. Must use quotes for a phrase.
-	Minus sign (NOT operator)	Excludes a word from the search results	canis -lupus canis NOT lupus	Either the minus sign or the text equivalent <i>NOT</i> may be used. The minus sign must appear immediately before the word to be excluded and be preceded by a space (otherwise it will be interpreted as a hyphen).
	Pipe character (OR operator)	Changes the default search from AND to OR	deer elk deer OR elk	Either the pipe character or the text equivalent <i>OR</i> may be used.
()	Parentheses to order the evaluation of search terms	Forces a group of terms to be evaluated together	canis (albus alces) canis (albus OR alces)	Use with the pipe character (<i>OR</i> operator)
\	Escape character	Removes the operator functionality from a special character	Tinodes provo Ross \& Merkley	Use immediately before a special character
Complex	May combine operators for a very specific search		^lontra (\$sonora \$lataxina)	Some combinations of operators may not make logical sense, so use carefully.

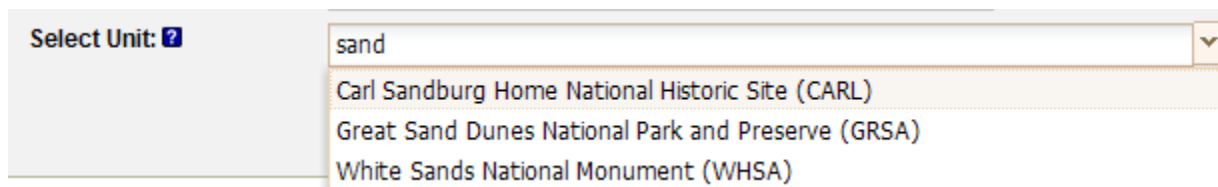
Other tips:

- Searching for common words such as 'in', 'the', or 'of' may give incorrect results. Use quotes for a text string that includes common words.
 - Example: Search for Jack in the Pulpit by entering "jack in the pulpit" – or just enter jack pulpit
 - Example: Search for Star of India by entering "star of india" – or just enter star india
- You may enter parentheses that are part of a name. Parentheses as part of the text string, without the OR operator, will be treated as regular text. However, it is not necessary to include the parentheses.
 - Example: Entering Aradus (Quilnus) will give the same results as Aradus Quilnus
- Punctuation (such as periods, commas or hyphens) does not need to be entered in the text string to get the correct results.
 - Example: Entering Abies var. will give the same results as Abies var
 - Example: Entering Alces Gray, 1821 will give the same results as Alces Gray 1821
 - Example: Entering black-footed ferret will give the same results as black footed ferret
- A possessive form of a name should be entered using the apostrophe.
 - Example: Search for Nava's wren by entering Nava's wren
- Some other special characters in the data may give incorrect results. In most cases, a search will be more efficient without the inclusion of these characters in the text string. The escape character \ as described in the table above may also be used.

- Example: Search for Tinodes provo Ross & Merkley, 1950 by simply entering Tinodes provo Ross Merkley
- Example: Search for Tinodes provo Ross & Merkley, 1950 by entering Tinodes provo Ross \& Merkley

4.2 Single Unit Selector

The single unit selector (simple drop down menu) allows you to choose a single unit to be included in a set of search criteria. You may start typing a Unit Name or Code and the drop down list will be filtered to those that match.



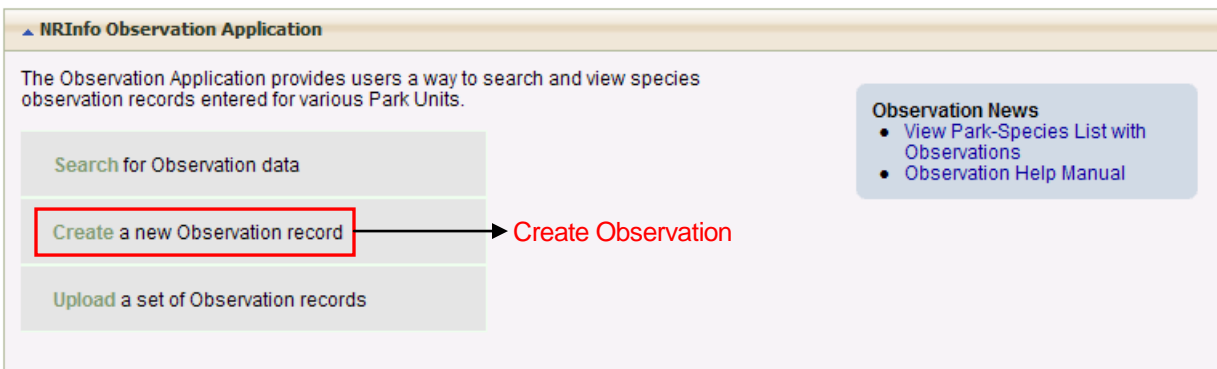
Select Unit: ▼

- Carl Sandburg Home National Historic Site (CARL)
- Great Sand Dunes National Park and Preserve (GRSA)
- White Sands National Monument (WHSA)

5 Creating and Editing Observation Data

5.1 How do I create a new observation record?

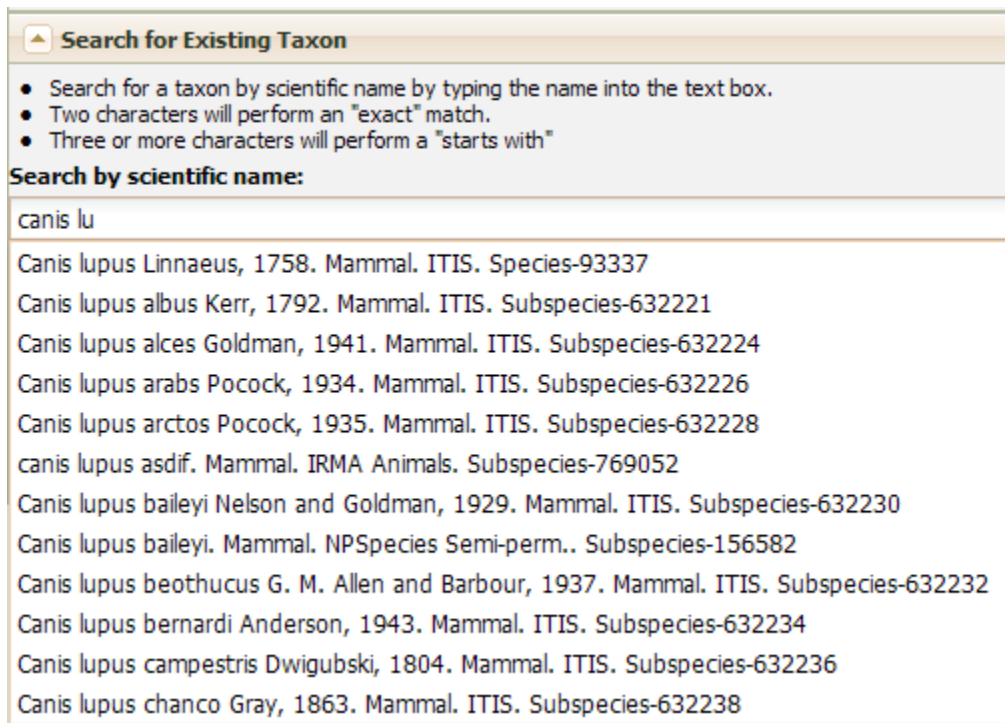
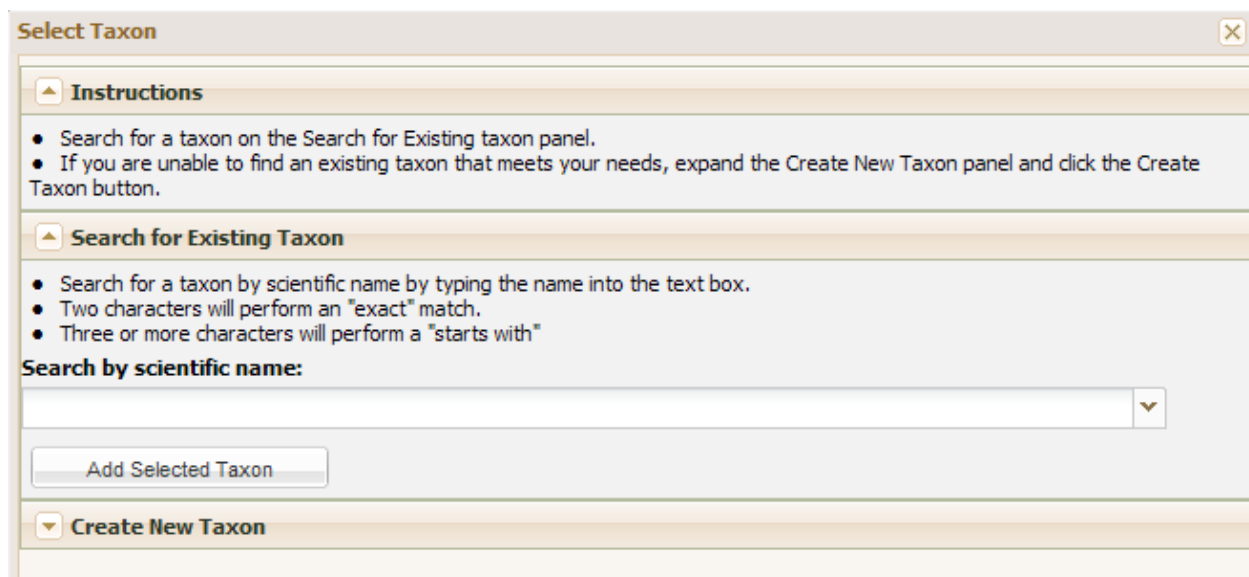
To create a new observation record, go to the Biology Tab and find the Observation Application Panel. Click on the Create link in the Observation Application Panel.



You will then be lead through choosing a species and park that the observation record will be for. The images and instructions below will describe the steps for choosing a species and park.

5.1.1 How do I choose a species for my new observation record?

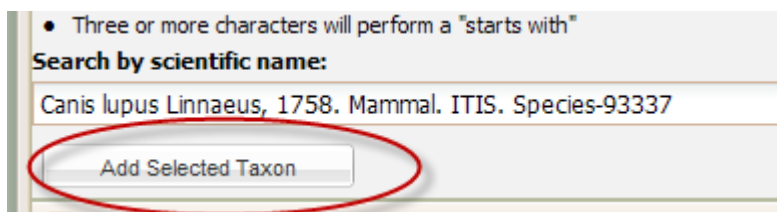
When the create observation link is clicked the first screen to appear is the Select Taxon screen (below). This screen contains three collapsible panels, with the first two being expanded. In most cases, the taxon is likely to already exist in our system. Therefore, you should always search for the taxon by scientific name to see if it already exists within our database. By typing in at least three letters, you initiate a search for names that begin with the specified text that you entered. A list of possible results is returned in the dropdown. This list will narrow as you continue to type.



If, after searching for a taxon, you discover that it does not exist, your other option is to create a new taxon. If you decide to go this route, please click the Create Taxon button in the Create New Taxon panel and see the help provided here:

<https://ninfo.nps.gov/Help.mvc/ShowPageContent?realm=Primary&domain=Biology&path=Taxonomy.Create>

Otherwise, as you can see, there will often be a number of taxa to choose from. When in doubt, add the taxon at the top on the shortlist since we have the ITIS accepted species sorting to the top.



5.1.2 When do I select a park?

The single unit selector will appear after you have chosen an existing taxon by finding the Taxon name you want from the Search by scientific name drop down and then clicked the Add Selected. The list of parks in the single unit selector will only have parks that you have permission to add or edit records for.

If you selected Create New Taxon and clicked the Create Taxon button, the single unit selector will appear. Then, after you select a park from the unit selector, the create Taxon wizard will appear and walk you through creating a new taxon.

5.2 When do I enter the rest of the observation record information?

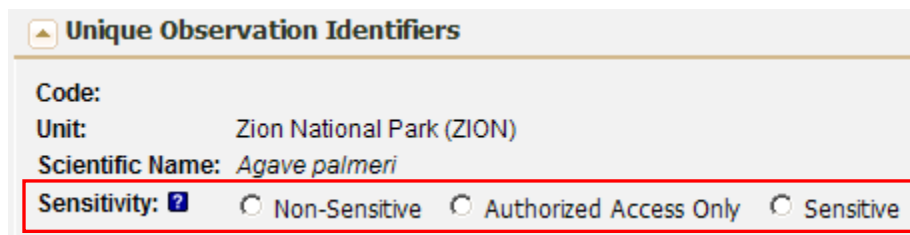
Once a species has been selected or created and a park has been selected an edit profile view appears so that the rest of the observation record information can be entered. This view looks very similar to the observation profile view, but all the information is blank and can be added.

5.2.1 What are the sensitivity values?

The only other required field (beside from species name and park) is the sensitivity field. The sensitivity value helps determine the visibility of the record to users. This value must be chosen, below are the three sensitivity values, their definitions and what users are allowed to see records with that value.

- Non-Sensitive – the record has no sensitive information and can be viewed by anyone including the public.
- Authorized Access Only – The record is visible to all NPS staff, partners, contractors and cooperators but is not visible to the general public.
- Sensitive – This record has information that is sensitive and can only be viewed by, park staff that are given sensitive reader status for the park the record is for, or are editor or POC for the park the record is for.

The sensitivity values are set at the top of the edit profile view in the Unique Identifiers panel.



5.2.2 Event Tab

The edit profile will open with the Event Tab on display. This tab is where the collection date and time can be entered, as well as the collector(s). Fields that hold other general information about the observation are displayed on this page such as the habitat the observation was seen and the physical description of the observed species.

Event Information
Location Information
Record Information

Documented Scientific Name:

Observer(s)

Legacy Observer(s):
Legacy Observer ID:

							+ Add
	First Name	Middle Name	Last Name	Suffix	Observer ID	Title	

Date/Time of Observation

Date Observed: ▼

Legacy End Date: No Data

Time Observed:

Habitat

General Habitat:

Montane/Alpine Upland Wetland
 Riparian Oceanic/Coastal Lotic (Flowing Water)
 Lentic (Standing Water) Barren Other

Specific Habitat: ▼

Habitat Comments:

Physical Description

Count:

Age:

Sex: Male Female Hermaphrodite Unknown

Observation Method:

Trapped Auditory
 Road Kill Visual with Naked Eye
 Visual with Binoculars or Scope Visual and Auditory
 Roadside Observation Animal Sign, i.e. tracks or scat
 Sign of Animal Activity, i.e. den or dam

Comments:

5.2.3 How do I enter data into a table in the observation profile?

Observer data is displayed and entered in the observer table on the events tab. Table data entry makes it possible to enter more than one value for a particular observation record, so an observation can have multiple observers associated with the observation recorded.

- 1) To add a new record to a table click on the text reading "+Add" at the top right of the table. This action creates a new row in the table for you to enter information into.
- 2) Click in each cell to enter the information you have.
- 3) To add a new record click on the "+Add" text again.

5.2.4 What is the button with the ellipsis (...) for ?

There are a number of comment or details fields in the voucher edit profile. These fields allow you to enter up to 4000 characters. In order for you to see all the text that is typed for a comment field a text box pop up was provided. Anywhere a button with an ellipsis (...) appears you can click on that ellipsis button and a larger text box pop up appears.

Habitat Comments: ...



Allowed Character Count: 4000 Current Character Count: 0

5.2.5 Location Tab

The Location Tab will be where information about the location an observation was made is entered. There is an option of entering a detailed description of the location using directions and landmark descriptions, as well as fields for entering coordinates, elevation and whether the observation occurred within or outside the park boundary.

Coordinates can only be entered in latitude, longitude at this time. In the future the location tab will have the option of entering coordinates in other projections as well as the option to click a point on a map displayed on the tab to indicate the observation point.

The screenshot shows a web application interface with three tabs: "Event Information", "Location Information" (which is selected), and "Record Information". The "Location Information" tab is divided into three sections:

- Location Description:** Contains a "Description:" text area, a "Local Location Code:" text field, an "Elevation:" text field with radio buttons for "Feet" and "Meters", an "In Park Boundary:" section with radio buttons for "Yes", "No", and "Unknown", and a "Comments:" text area.
- Geospatial Attributes:** Features a heading "Enter Only Latitude, Longitude Coordinates with Datum WGS84:" followed by "Latitude:" and "Longitude:" text input fields.
- Legacy Coordinates:** Lists several fields: "Datum:", "Latitude (DD):", "Longitude (DD):", "UTM X:", "UTM Y:", "UTM Zone:", and "Coordinate Error:".

5.2.6 Record Information Tab

The record information tab includes general comments and data source for the observation record, including who and when the record was created and last modified. Entered By and Last Modified By are completed by the system as the records are created or edited.

The screenshot shows a web-based form with three tabs: 'Event Information', 'Location Information', and 'Record Information'. The 'Record Information' tab is active. It contains two main sections: 'General Comments and Data Source' and 'Record History'. The first section has seven input fields: 'Comments', 'Data Source', 'Reference Code', 'Online Link', 'Project', 'Source Database', and 'RecordID'. Each of these fields has a small dropdown arrow to its right. The second section, 'Record History', contains four labels: 'Created By', 'Created Date', 'Last Modified By', and 'Last Modified Date', which are currently empty.

5.2.7 How do I save my new observation record?

Once you have completed entering information the record can be saved. There are a few available states that the record can be saved as:

- Active – This means the record information is completely entered and is ready to be viewed by all who have permission for see active records.
- Draft – This means that some data still needs to be entered or confirmed before all can see the record.

To save the record go to the bottom of the profile, there you will find a series of buttons, click the button with the state you want to save you voucher record to (Draft or Active). This will save the record and set the state at the same time.

The screenshot shows a horizontal row of buttons. On the left is a label 'Save Voucher and Set To:'. To its right are four buttons: 'Inactive', 'Draft', 'Active', and 'Legacy'. Below these buttons, on the right side, is a blue text link labeled 'Cancel'.

NOTICE: There is an option to cancel. Click on Cancel if you do not want to save the information you have just entered. No record will be made and you will not be able to find this record in a search, it will not exist!

5.3 How do I edit an existing observation record?

To edit an existing observation record you must first search for the record you want to edit using the observation search options. For instructions on how to use the observation search options go to sections 3.1 and 3.5.

- 1) Run an observation quick search or observation search by code to get a list of observation records in the observation results table.

- 2) Select a record from the observation results table and open up the observation profile view. If you have permission to edit the observation record you are looking at then there will be blue hyperlink text in the upper left of the profile reading [Edit Profile](#).
- 3) Click on the [Edit Profile](#) link.
- 4) The Edit Observation Profile view will load and be ready for edits.

The Edit Observation Profile view looks the same as the create voucher profile and has the same tabs for data entry. There are two main differences between create and edit. First, you will not be able change the species name or park that the observation record is for when editing an existing record. Second, when saving the record there will be different state options available to you depending the current state of the record.

There will be the option to Inactivate the record, save as Active, save as Draft (if it is currently a draft record) or save as Legacy (if it is currently a legacy record).

- Inactive – record is no longer visible to most readers, soft delete. It can still be seen if linked to an NPSpecies record.
- Legacy – this state was given to all records that were migrated from the original NPSpecies 1.0 database in Oracle. These records are visible to all who have the proper permissions but may not have complete information. POCs have the option to gradually change these records to active or keep these as legacy.
- Active – This means the record information is completely entered and is ready to be viewed by all who have permission for see active records. A complete record still may not have all the fields filled in.
- Draft – This means that some data still needs to be entered or confirmed before all can see the record. Only records currently set to Draft can be saved as draft again.

There is also the option to cancel your changes. Clicking on Cancel will take you back to the Observation Profile View and no data changes that you made while in edit will be saved.

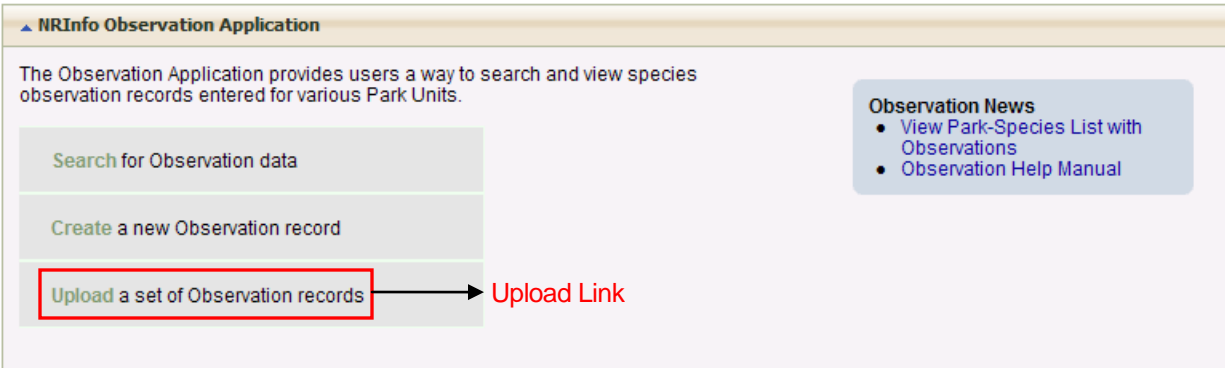
6 Uploading Data Files For Import

Observation data is often entered into an excel or MS Access database on a biologist's desktop computer. To avoid extra work of requiring entry through the create observation portal interface there is also an option to submit these files for NRPC staff to import into the observation database. Only POCs will have access to the voucher file upload page. Alison and Michelle will be notified that a file is uploaded, however if you have questions about the process or special instructions for the import, contact Alison and Michelle via email or phone after you submit the file through upload.

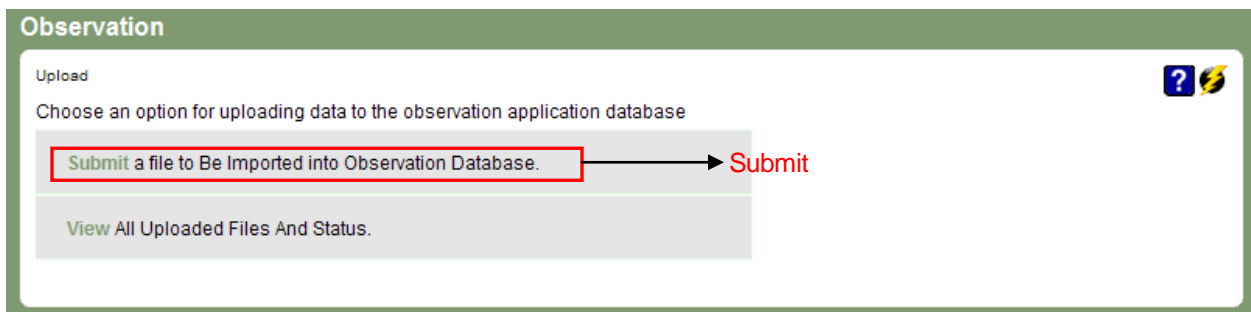
6.1 How do I upload a file for import?

First remember that only POCs will have access to the upload page.

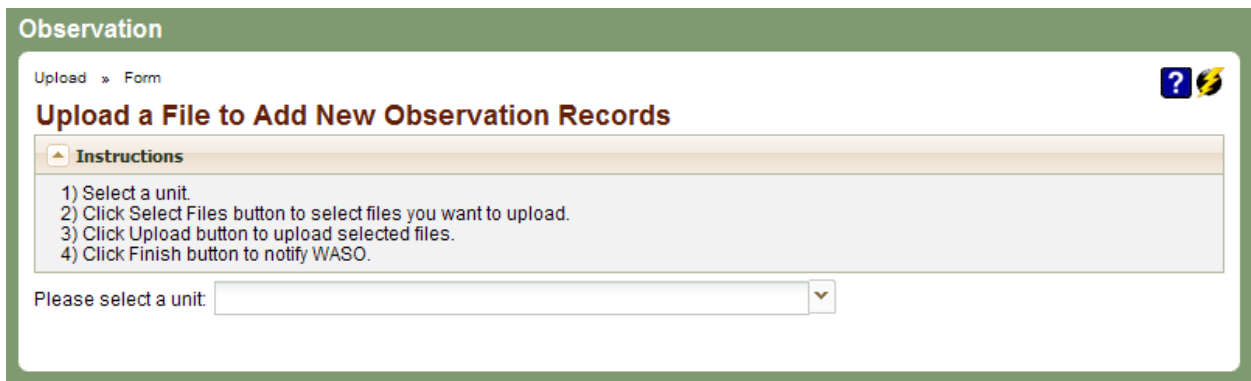
- 1) Access to upload is through the Biology Tab page. Find the Observation Application panel on the Biology page and click on the Upload link.



- 2) You will be taken to the Upload Landing page, click Submit to go to the file upload page.



- 3) You will first be prompted to enter a park unit. You must enter the park the file upload is for before uploading files.



- 4) Once a park is picked the single unit selector will be grayed out and select files for upload box will appear.
- 5) To add a file click on the Select Files button. You can upload multiple files, however keep in mind all the files will be associated with the same park that you selected in step 3.
- 6) Once you have select all the files you wish to upload for the specified park click the Upload button, the files will be uploaded to a storage area at NRPC, Fort Collins.
- 7) Finally, click on the Finish button this will log the upload so that Alison and Michelle will know there are files to import.

Observation

Upload » Form

Upload a File to Add New Observation Records

Instructions

- 1) Select a unit.
- 2) Click Select Files button to select files you want to upload.
- 3) Click Upload button to upload selected files.
- 4) Click Finish button to notify WASO.

Please select a unit:

Name	Status	Size	Progress
DEVA_DATA_20110330.MDB	Pending	29 MB	clear

Total: 1 0 KB of 29 MB

File waiting for upload.

Click to upload all files.

Click to add more files for upload.

You MUST click Finish to notify NRPC

- 8) Optionally, you can remove a single file from the upload box by clicking on the hyperlinked text [clear](#) on the line the file name appears.
- 9) To remove all files click the Clear All Rows button, this will remove all files to be uploaded and will reset the page so that a new park unit can be chosen.

6.2 What if I want to upload multiple files for multiple parks?

If you have more than one file but each file or set of files is for a different park you will have to go through the upload process for each set of files for a different park.

- 1) Follow the steps 1 through 7 in section 6.1 to upload your file(s) for one of the parks you have upload files for.
- 2) After (**AND ONLY AFTER**) you have clicked on the Finish button click the Clear All Rows button in the select files for upload box. This will clear all the previously uploaded files and clear the unit selector.
- 3) Select the next park unit you have files for in the single unit selector.
- 4) Go through steps 4 through 7 in section 6.1 again.

- 5) If you have more parks with uploads continue to click the Clear All Rows button after you have finished your previous uploads and clicked the Finish button. Then run through the upload steps for the next set of park files.

7 Visibility of Observation Data

7.1 Authenticated vs. Unauthenticated Users

Authenticated users are those that are recognized by the NRInfo Portal. Unauthenticated users are those that are not recognized by the NRInfo Portal. Authenticated users are those using an NPS computer and may have elevated permissions to take particular actions within an application on the NRInfo Portal (i.e. edit data in Voucher for ROMO).

7.2 Observations

Access to observation data was assigned based on users past access to NPSpecies 1.0 data. Users that had edit access to specified parks or networks were granted that same access in the observation application. In the past a login had to be given to a user in order for them to have access to NPSpecies and observation data, now users with NPS active directory accounts will automatically have access to the NRInfo portal and a subset of observation data by default, as long as they have logged onto a NPS computer. Below is a summary of different user access.

- Unauthenticated or Public Users – Observation records will not be visible to unauthenticated or public users at this time.
- NPS or Authenticated Users – By default all NPS Authenticated users will have access to observation records that have a sensitivity value of Non-sensitive or Authorized Access Only. Added permission will give authenticated users greater access to observation records.
 - Reader Access to Sensitive Records – This is an added permission granted to users. Users are granted read access to records designated as sensitive. This is granted based on park so users can see all records for parks they have this elevated read access to but will not see sensitive records for the rest of the parks they have not been given access to.
 - Edit Access – This is an added permission that can be assigned to a user. Users are granted edit access to all records, regardless of sensitivity value for specified parks. Users will only have the default access to records for parks that they do not have edit access to.
 - POCs – POCs have the same access as editors, also based on assigned parks, in addition POCs are also able to upload files for a batch import of observation records and will be able to add or remove user permission to the observation application, in the future.

8 Appendix A – Glossary

Category

A grouping of taxa; categories may come from the classification source that provided a taxon (i.e. USDA Plants Categories) or they may be added by a separate organization (i.e. NPSpecies Categories). An example of an NPSpecies Category is "Birds".

Classification Source

A classification source is a provider of Taxonomy records. In the current Taxonomy Application, there are three Classification Sources: the Integrated Taxonomic Information System (ITIS), NPSpecies Semi-permanent Names (Taxonomy records added by the NPSpecies system owner), and NPSpecies Temporary Names

(Taxonomy records added by the NPSpecies user community). USDA Plants will be added as a classification source in a future version of the Taxonomy application.

ITIS

See Classification source.

Kingdom

A taxonomic rank, typically recognized as the highest rank in biological taxonomy. Typically five or six kingdoms are recognized. An example of a kingdom is Plantae, the plant kingdom.

Observation

An observation is subjective evidence (no physical proof taken) as to the identity and the location of an organism. Observations are managed within the Observation application. Some observations may be linked to NPSpecies Park Species records and some may not.

POC

Point of Contact designated by each park, network, and region to be the single "gatekeeper" and coordinator for data entered into NPSpecies. POCs for each park are designated in writing by the park superintendent through Inventory & Monitoring (I&M) network Board of Directors and other mechanisms. In the majority of cases, the I&M Data Manager for an I&M Network is the POC for all parks in the network, although some large parks have designated their own POC.

Rank

An indicator of position within a taxonomic hierarchy. Common ranks in order from highest to lowest include kingdom, division or phylum, class, order, family, genus, and species. Other ranks exist between these ranks and below species, but are less commonly used.

Repository

A museum, herbarium or other designated storage area for voucher specimens.

Taxa/Taxon

A taxonomic group or entity. Each record in the Taxonomy application is considered a taxon. Taxa is the plural of taxon.

Taxa/Taxon Code

A unique identifier for a taxon in the Taxonomy application. It is in the form of a positive integer.

Taxon Display Citation

A shortened notation that describes a taxon in the following format:
CategoryName.ScientificName.ClassificationSourceName.RankName-TaxonCode[LifecycleState].

Taxonomic Hierarchy

A Taxonomic Hierarchy is a listing showing the placement of a taxon and its parentage in descending order by rank; typically all the way to kingdom for biological nomenclature.

Taxonomy

Taxonomy is the science and practice of classification, arranging taxa in hierarchies by ranks following a parent-child relationship.

Taxonomic Serial Number (TSN)

See Code.

Voucher

A voucher is physical evidence used to confirm identity and prove an organism was found in a particular location. Forms of physical evidence include a voucher specimen at a museum or herbarium (including whole or

piece of organism), photo image (i.e. digital or harpcopy), or etc. Vouchers are managed within the Voucher application. Some vouchers may be linked to NPSpecies Park Species records and some may not.

9 Appendix B - Data Dictionary

9.1 Observation Fields and Descriptions

Profile Tab	Label	Definition
Unique Observation Identifiers	Observation Code	Unique code identifying each observation record.
	Unit	The park or park unit that the observation is linked to. The observation does not need to have been collected within the park boundary but should have been collected within close proximity.
	Standard Scientific Name	The complete scientific name of a taxonomic unit. The Standard Scientific Name can be of any rank (e.g. species, genus, family, etc. - see <i>Rank</i> below). There are three sources of Standard Scientific Name, as with <i>TSNs</i> .
	Sensitivity	Security level based on the sensitivity of this particular observation record.
	Non Sensitive	No access restrictions
	Privileged	Restricted to National Park Service staff, partners, contractors and cooperators.
	Sensitive	Restricted to park staff specified in Park Code
	Lifecycle Status	The life cycle status describes the state of the observation record; a record can be Active, Inactive, Draft or Legacy.
	Active	Data entry for this record is considered complete, no more review or data checks are needed. This does not mean that the record cannot be edited if data need to be updated or corrected it just means that at this time the record is considered complete.
	Inactive	Inactive is considered a soft delete. The record is still in the database but has been removed from visibility because the record is out dated, incomplete or in accurate.
	Draft	The record data entry has not been completed, more information either needs to be entered or the record was entered by an intern and needs to be reviewed before being marked as active.
	Legacy	A legacy record is one that has been migrated from the original NPSpecies 1.0 database. This data may or may not be complete. These records can be changed to active if they are considered complete.

Event Tab	Documented Scientific Name	Scientific name that was documented when the species was observed.
	Legacy Observer(s)	Name(s) of observer(s) that were entered in the NPSpecies 1.0 application. These data are being migrated to a new database schema, so the "legacy" values were preserved to confirm correct migration.
	Legacy ObserverID	The original ID assigned to the observation by the observer at the time of observation. These data are being migrated to a new database schema, so the "legacy" values were preserved to confirm correct migration.
	Observer Name	Name of observer.
	Observer ID	The original ID assigned to the observation by the observer at the time of observation.
	Observer Title	The observers title at time of the observation (i.e. Biologist)
	Observer Affiliation	The affiliation of the observer at the time of the observation. (i.e. Yellowstone National Park).
	Date observed	Date that the observation was made. If the data was migrated from NPSpecies 1.0 the Date Observed, may be the beginning of a date range if the exact date could not be determined.
	Legacy End Date	The end date of a date-range if the exact date of the observation was unknown. This is only a legacy field and holds end dates for dates where an exact date could not be determined and so a date range was entered.
	Time	Time of observation (12-hour clock).
	General Habitat	Keyword selected to describe the general habitat the voucher was collected in.
	Specific Habitat	Keyword selected to more specifically describe the habitat the voucher was collected in.
	Habitat	Description of habitat where collection was made.
	Count	The number of individuals that were collected.
	Age	Age is individual collected, if determined.
	Sex	Sex of individual, if determined and if animal.
	Observation Method	What method was used to observe the species (i.e. Auditory, Trapped, Road Kill, Visual with Binoculars or Scope).
	Observation Method Comments	Notes associated with the type of observation method recorded.
Location Tab	Description	Concise description of observation site within the park.
	Local Location	An optional code identifying a permanent locally

	Code	recognized location where the observation was made. Can be used in lieu of coordinates when numerous records need to be added.
	Elevation	Elevation where observation was made.
	ElevationUnits	Units for elevation (feet or meters).
	InParkBoundary	Yes/No/Unkown whether the observation was seen inside the park boundary.
	In Park Boundary Details	Any comments or notes associated with the determination of whether the observation was made from within or outside the park boundary.
(Legacy Coordinates)		All the coordinates are being preserved from the migrated legacy data and can be viewed in the Legacy Coordinates Panel of the Location Tab. Coordinates will also be converted to Latitude, Longitude WGS 84 for the purposes of mapping the coordinates. All new coordinates will be stored in Latitude, Longitude as well.
	Latitude(DD)	Latitude in decimal degrees where the observation was made.
	Longitude(DD)	Longitude in decimal degrees where the observation was made.
	UTM X	UTM X coordinate (easting) where the observation was made.
	UTM Y	UTM Y coordinate (northing) where the observation was made.
	UTM Zone	UTM Zone of X and Y coordinates for the collection.
	UTM Datum	Datum for UTM coordinates (i.e. NAD27 or NAD83).
	Coordinate Error (meters)	Estimated accuracy of the location coordinates in meters.
Record Information	Comments	Any general comments about the observation and observation record.
	Data Source	The data source of the observation record, if known.
	Reference Code	This used to be BIBKeyID, but with NatureBib retired and the Reference application taking its place this field was changed to Reference Code. This field holds any reference code that may be a citation of study were the observation was made.
	Source Database	If the observation record comes from some other database than the database name can be entered here. (i.e Visitor observation database for Yellowstone).
	RecordID	This is the unique ID for the observation in the database named in the Source Database Field.
	Online Link	If there is an on line link to other information about the observation it can be inserted here.

	Project	If the observation was collected as part of a larger project the project name can be entered here.
	Created By	This information is tracked internally and filled in by the system. The user that creates the observation record will be entered here.
	Created Date	This information is tracked internally and filled in by the system. The date that the observation record is created will be saved in this field
	Last Modified By	This information is tracked internally and filled in by the system. The last user to edit the observation record will be entered in this field.
	Last Modified Date	This information is tracked internally and filled in by the system. The last date that the observation record has been edited will be entered in this field.

10 Frequently Asked Questions (FAQ)

10.1 What is the Observation Application?

The Observation Application Stores and manages observation data that was once part of NPSpecies 1.0. Observation data stored in the new Observation Application can be used as evidence for NPSpecies 3.0 species list but does not have to be.

10.2 What is the difference between NPSpecies 1.0, NPSpecies 2.x, and NPSpecies 3.x?

The NPSpecies 1.0 is the original online silo version of NPSpecies that is being rebuilt using web services. NPSpecies 2.x is a temporary transition read-only version that is accessible from the NRInfo Portal and over time will include more and more functionality as it goes through iterative software design. NPSpecies 1.0 will be decommissioned in 2010, at that time NPSpecies 3.x will take the place of NPSpecies 1.0.

10.3 How do I link my observation data to a species in a NPSpecies Park-Species List?

This is done through the NPSpecies Application.

- 1) Go to the Biology Tab and find the NPSpecies Application Panel.
- 2) Click on Search in the NPSpecies Application Panel.
- 3) Choose the following Parameters:
 - a. Search Type: Park-Species Profile
 - b. Search: Park-Species Quick Search
 - c. Layout: Park-Species Profile
 - d. Select Unit: <the park unit you are interested in>
 - e. Taxonomic Category: <either leave as All or change to the taxonomic category the species you are going to link vouchers to is in>
 - f. Name Type: <choose scientific or common depending on what species name type you will be entering in the Name field.
 - g. Name: <part or all of the species name you what to link vouchers to>
- 4) Click the Search Button, a refine search table appears with a list of species names that could be potential matches to what you typed in the Name field.
- 5) Select the name you are interested in and that park-species profile will load.
- 6) Click on the Hyperlinked text "Edit Profile" that appears under the Park_Species Profile title. This will allow you to edit the profile.
- 7) Click on the Evidence tab. This is where you can link observation records to a park-species.

10.4 Will the public be able to see observation data?

No, the observation data will only be viewable to NPS staff, partners and contractors; this means only individuals with an NPS Domain account and login.

10.5 How can I make a correction or add to my park's observation data?

The observation data will be editable on the NRInfo Portal at the beginning of May, if you have edit permissions. If you do not have permission to edit observation data for a park, please contact your park's [Point of Contact](#).

10.6 When will I be able to add or edit information on the NRInfo Portal?

May 1st, 2011

10.7 Where can I find field definitions?

The field definitions for observation data are located in [Appendix B](#) of this document. (Section 9)