Quick Help 8: Reviewing and Promoting IWMM Data

Objective: Users with IWMM data in the Avian Knowledge Network Data Management System (AKN) will learn how to review an existing survey record, make any necessary edits, and promote their data to a higher sharing level.

Audience: Current, registered IWMM users with *Biologist* and/or *Project Leader* access to a project in the AKN.

Step 1. Logging in to the IWMM Portal

IWMM participants that have registered for an account in the AKN and have been assigned to a project may review, edit, and promote/share their data all within the IWMM portal. If you have *Biologist* level permissions you may review all data and promote it to sharing level 'Clean', indicating that the data has gone through an initial proofing and is ready to promote further. From here, users with *Project Leader* permissions are encouraged to promote data to 'Level 5', but should promote data to 'Level 2' at a minimum. More information on AKN sharing levels can be found on the AKN website at http://www.avianknowledge.net/index.php?page=data-access.

If you have not yet registered for an account in the AKN, please register by going to https://data.prbo.org/apps/public/index.php?page=new-user-registration.

After you have logged in, select your site from the **Select Site (Project)** drop down menu.

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Step 2. Reviewing and Promoting Data Survey-by-Survey

This option is useful for users with few surveys to review, or for users that are interested in reviewing and promoting a specific survey, or small set of surveys for specific locations and/or dates.

2.1 Reviewing survey data

With your project selected, hover over the **Data Entry** tab located at the top of the **Project Dashboard**. Select the type of survey you are interested in reviewing, for example **Bird Survey.**
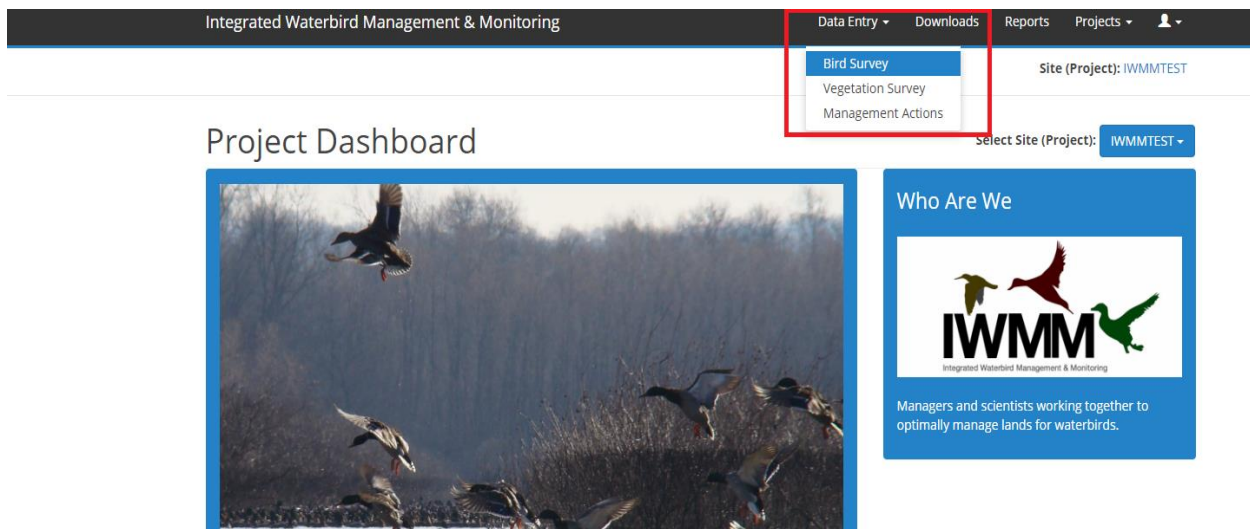
On the next screen, you will see a list of all survey units associated with your project. Click on the unit corresponding to where the bird survey data was collected.

Scroll down to the **Review/edit an existing visit** section. Here you will see a table, listing all surveys associated with that unit by date. The table also displays basic metadata about that survey to help you with locating the survey you are interested in. You may filter items within the table by clicking on the column header for the column you wish to filter. Once you've found a survey of interest, click on the

Date to view the survey in more detail. Before promoting your data, you will need to review the survey to confirm the data matches what you collected on the original data form and is free from errors.

✏ Review / edit an existing visit

Review and edit an existing visit below by selecting the date.

ℹ *Quick Tips >>*

Select the correct date   You can also download the `369 rows`
table to search   ⊕ Download CSV

Date ℹ	Visit ℹ	Count ℹ	Start Time ℹ	End Time ℹ	Protocol ℹ	Status ℹ
2018-07-05		0	08:24	08:27	IWMM_GroundSurvey	RAW
2018-06-21		5	15:10	15:14	IWMM_GroundSurvey	RAW
2018-06-18		7	07:22	07:58	IWMM_GroundSurvey	RAW
2018-06-07		20	07:37	08:13	IWMM_GroundSurvey	CLEAN
2018-06-07		0	09:07	09:10	IWMM_GroundSurvey	CLEAN
2018-05-30		1	09:53	09:57	IWMM_GroundSurvey	RAW
2018-05-23		3	07:40	08:12	IWMM_GroundSurvey	CLEAN
2018-05-23		1	14:13	14:23	IWMM_GroundSurvey	RAW
2018-05-15		826	09:10	09:33	IWMM_GroundSurvey	CLEAN
2018-05-09		16	06:53	07:42	IWMM_GroundSurvey	CLEAN
2018-05-08		1	13:24	13:30	IWMM_GroundSurvey	RAW
2018-04-30		2	09:57	10:06	IWMM_GroundSurvey	RAW
2018-04-24		4	13:25	13:35	IWMM_GroundSurvey	RAW
2018-04-23		40	06:48	07:44	IWMM_GroundSurvey	CLEAN
2018-04-16		8	09:04	09:11	IWMM_GroundSurvey	CLEAN
2018-04-08		0	08:15	14:24	IWMM_GroundSurvey	CLEAN

⇒ scroll to view more surveys

When reviewing survey data, pay attention to the following:

- **Overview** – Date, Visit number, and Observer
- **Site Conditions** – Location, Time, Site Condition Protocol, and actual site conditions
  - All IWMM data should follow the 'IWMM_SurveySiteConditions' protocol.
- **Observations** – Species, Count, Note (optional)
  - In the event you need to delete an observation, click on the red x to remove that record from the survey.
  - Click on the **+Add more** button to add more observations if needed.
- **Species List** – Verify the species counts are as expected
  - If not, return to the observations section to re-verify your species entries.

For more detailed guidance on common errors to look for when reviewing IWMM data, please see *Key Issues to Look for When Reviewing IWMM Data in the AKN Data Management System*, located in ServCat.

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2.2 Promoting survey data

By default, all new surveys in the database are given a sharing level of 'Raw'. The first step in promoting survey data is to mark the survey as 'Clean' indicating it has been reviewed and checked for errors. Note that while users with either *Biologist* or *Project Leader* permissions are able to promote records to 'Clean', only users with *Project Leader* access are able to promote surveys further. To promote a survey to 'Clean' click on the **Proofing completed** button.

Data status is currently RAW. When you have finished proofing and reviewing this visit, click:

✔ Proofing completed

After you have thoroughly reviewed your data and promoted it to 'Clean', locate the **Data Sharing Level** field underneath the **Overview** section. Double-click on the blue line to expand the drop down menu. From here, select the appropriate sharing level for the survey. Your changes will be saved automatically. In the event you need to demote a survey (i.e. if the survey was promoted by accident or still contains errors) you may do so by following the process described above but selecting a lower sharing level (e.g. 'Raw').

▤ Overview

❶ *Quick Tips >>*

Project:	DUMBIO
Site:	IWMM Test Unit (01) (01-IWMMTEST)
Date ❶ :	2018-05-08
Observation Protocol:	AREASEARCH
Visit ❶ :	Click to edit
Start time ❶ :	07:55
End time ❶ :	08:05
Observer ❶ :	Johnson, Jaclyn
# of other observers ❶ :	0
Other observer names ❶ :	Click to edit
Notes ❶ :	Click to edit
Data Sharing Level ❶ :	CLEAN ▼

RAW
CLEAN
APPROVED
AVAILABLE Level 1
AVAILABLE Level 2
AVAILABLE Level 3
AVAILABLE Level 4
AVAILABLE Level 5
RESTRICTED

Delete this visit

🔭 Observations

Species observations with details, layout and t~~...~~ ~~...~~otocol.

❶ *Quick Tips >>*

☑ Scroll observations (Beta)

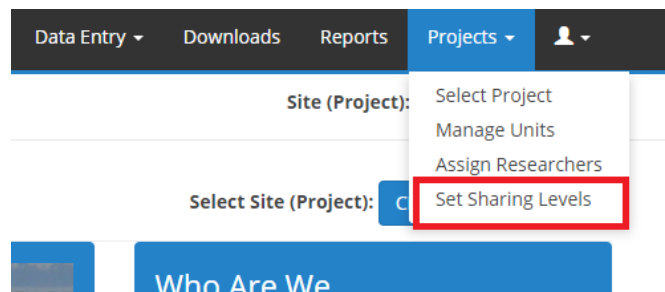## Step 3. Reviewing and Promoting Data in Bulk

This option is useful for users with a lot of surveys to review, or for users who are interested in reviewing and promoting multiple surveys at a time. Note that this option only applies to users with *Project Leader* permissions.

3.1 Reviewing survey data

Complete Step 1 to login to the IWMM portal and select your project. With your project selected, hover over the **Projects** tab located at the top of the **Project Dashboard.** Select **Set Sharing Levels** from the drop down menu.

Data Entry ▾	Downloads	Reports	Projects ▾	👤 ▾

Site (Project):

Select Site (Project):

Projects dropdown:
- Select Project
- Manage Units
- Assign Researchers
- Set Sharing Levels

Who Are We

From here you will be taken to Point Blue's **Edit Data Sharing Levels** bulk editing tool. This tool will allow you to view all surveys associated with your project, organized by date and location (Name). Basic metadata about each survey is displayed within the table. Before promoting your data, you will need to review the survey to confirm the data matches what you collected on the original data sheet and is free from errors. To view each survey in detail, click on the **open in Biologists** link. The survey you select will open up in a new tab.

When reviewing survey data, pay attention to the following:

- **Overview** – Date, Visit number, and Observer
- **Site Conditions** – Location, Time, Site Condition Protocol, and actual site conditions
    - All IWMM data should follow the 'IWMM_SurveySiteConditions' protocol.
- **Observations** – Species, Count, Note (optional)
    - In the event you need to delete an observation, click on the red x to remove that record from the survey.
    - Click on the **+Add more** button to add more observations if needed.
- **Species List** – Verify the species counts are as expected
    - If not, return to the observations section to re-verify your species entries.

For more detailed guidance on common errors to look for when reviewing IWMM data, please see *Key Issues to Look for When Reviewing IWMM Data in the AKN Data Management System*, located in ServCat.

3.2 Promoting survey data

After you have thoroughly reviewed your data, return to the bulk editing tool. From here, locate the surveys you wish to promote. You may filter your data by **Begin Date** and **End Date** or type in the criteria you are looking for in the **Search** bar. You may promote surveys one at a time, or select multiple surveys

to promote them to the same sharing level. To promote your data, select the survey or surveys you wish to promote; selected surveys will be highlighted blue. Select the sharing level from the **Data Sharing Level** drop down menu and click **Set,** then **Save.** You may also undo any action by clicking **Unset** and then **Save.** If you need to demote a survey (i.e. if the survey was promoted by accident or still contains errors) you may do so by following the process described above but selecting a lower sharing level (e.g. 'Raw').

 It is very important that you click **Save** after making any change to your data in order for it to be updated in the database.

More detailed guidance on how to use the bulk editing tool may be found within the tool under **Usage Instructions.**