



# Help Guide 1

## Getting Started in the Avian Knowledge Network

**Summary:** New users to the Avian Knowledge Network (AKN) will learn about the AKN system and its requirements, how to register for an account and request access to one or multiple projects, as well as the methods for requesting a new project. Additional help resources are also described at the end of the document.

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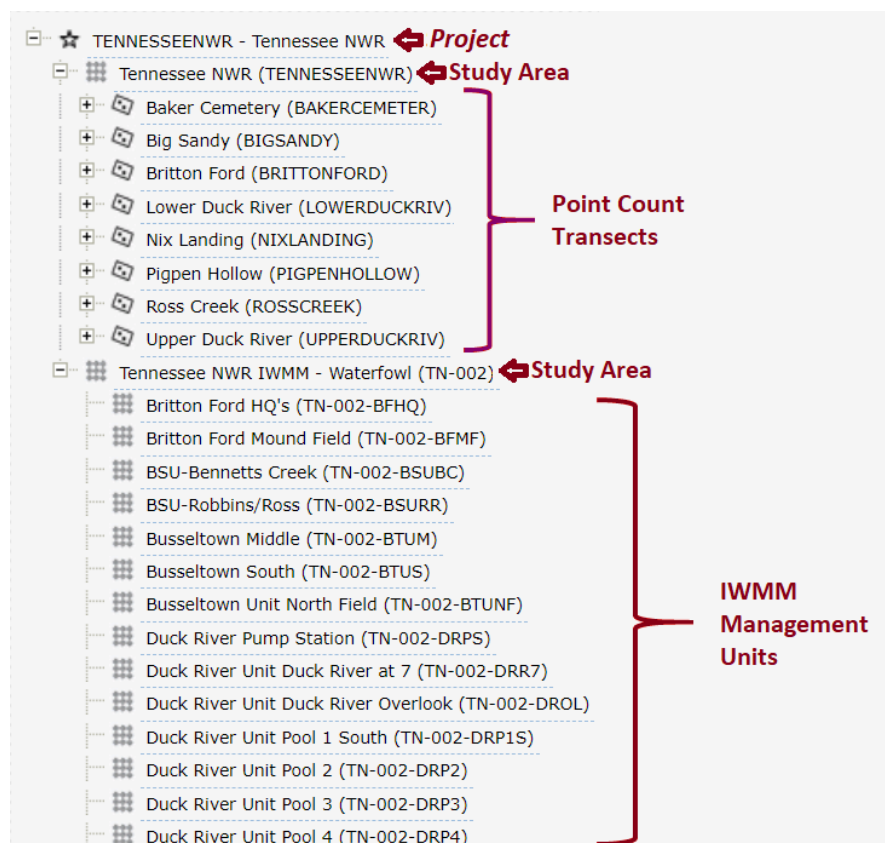
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### Conventions

When registering for an AKN account, you will use your FWS email as your login name and enter a unique password. Avoid using your Active Directory password since your AKN account is not tied to your active directory and will not change when the password change is required. If you encounter issues while registering or using the database, or if you have general questions about how to use the database, refer to the [AKN Information page](#) or contact the [Inventory and Monitoring Data Manager](#).

The AKN uses project identifiers or codes to maintain project data. For FWS national wildlife refuges, this code is the name of the refuge as one word using capital letters. For example, if you were entering data into the AKN for “Monte Vista NWR”, your project code would be MONTEVISTANWR. Data downloaded from the AKN will include this code rather than the full name of the project.

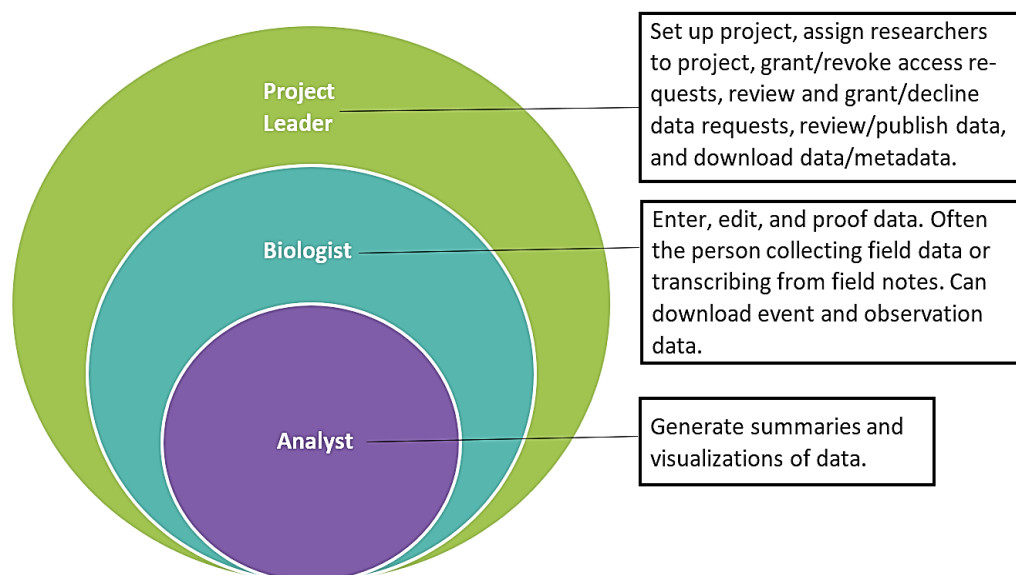
**!** All data for a refuge are to be placed in one project regardless of the type of observations (point count, marshbird, etc.). For example, the Tennessee National Wildlife Refuge contains data from point count and IWMM observations. Each type of observation is grouped within a “study area” (analogous to a folder) inside of the TENNESSEENWR project. As new studies are conducted on a refuge, the observations should be added to the same refuge project. A refuge should have only one project in the AKN. How data is organized within the project is at the discretion of the project leader(s) (e.g., A study area can refer to a small section of a refuge that has multiple types of observations with varying protocols. All observations can be placed within the study area.)



❗ When entering data manually, if no birds were observed along a transect point, enter **NONE** for the species and **0** for the count. These values are required in the AKN. If a value other than NONE (e.g., “n/a”) is used, the AKN system will reject it and not allow fields like “Observer” to be populated.

## Database User Titles

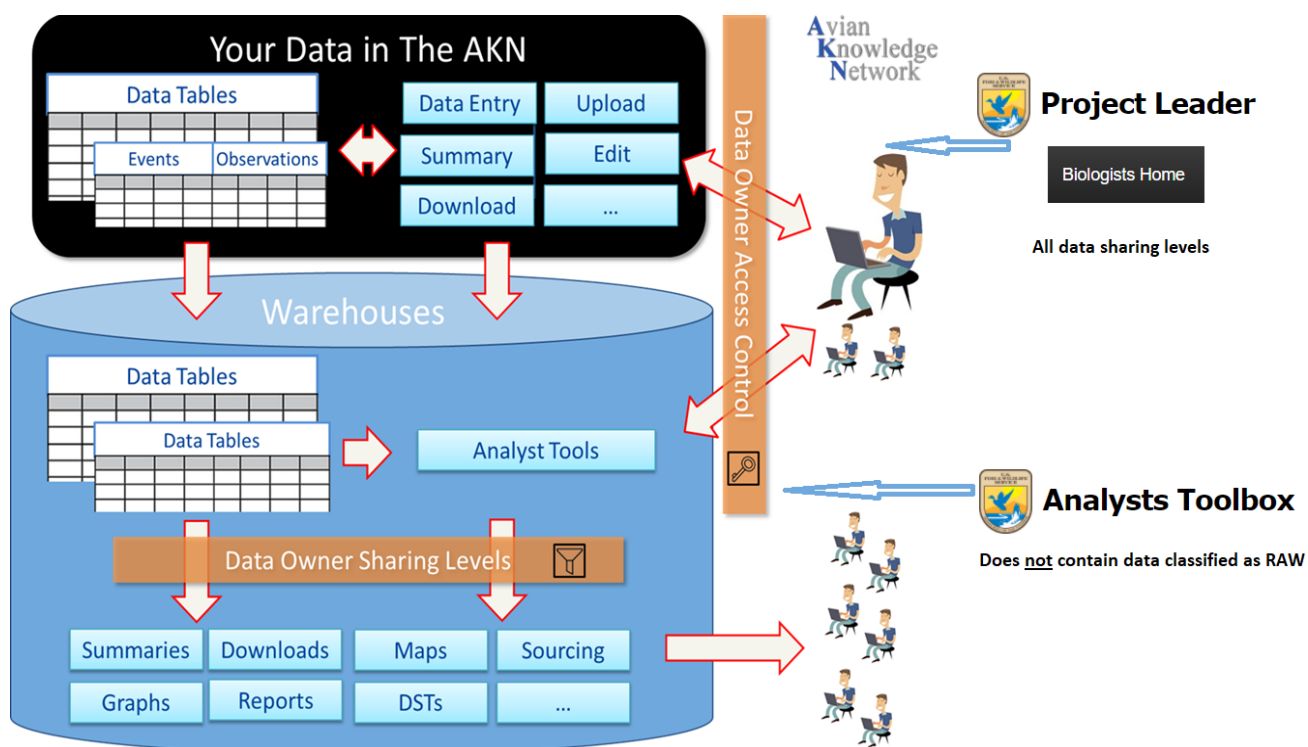
In order to ensure data security, the AKN restricts permissions depending on the user's database title. Database titles do not relate to an individual's actual job title or duties. The AKN uses three main titles (in order of highest to lowest permissions): *Project Leader*, *Biologist*, and *Analyst*. A Biologist has all of the permissions of an Analyst, plus additional access to functions within the **Biologist** application. Similarly, a Project Leader has access to all Analyst and Biologist functions, with added permissions to the **Project Leader** application. This means that a user with *Project Leader* access can also serve as the *Biologist* for their project and data if needed.



## Structure of the AKN

Projects within the AKN system are themselves individual databases. All observations with varying methods and protocols are stored within the project database. Each database contains all data at the original observation resolution. This is referred to as the “transactional” database. All data entered into the transactional database are given a sharing level of RAW. Once data has been reviewed, and the sharing level is promoted from RAW to at least CLEAN, the data is copied into the AKN Warehouse where it is incorporated with data from other projects. The data in the warehouse contains fields common to all observation methods and protocols. The data is available for download through the [AKN Data Downloader](#). *Project Leader* and *Biologists* interfaces operate on the transactional database (original data). The *Analysts* tools, including IWMM reports, utilize the AKN Data Warehouse.


! Data that has not been promoted to a sharing level higher than RAW will not be available for reports or analysis.



## New User Registration and Project Access

All new users may register by going to Point Blue's [new user registration page](#). To register, users must provide their name, email address, and the organization they are affiliated with. FWS staff need to use their @fws.gov email when creating an account. This will serve as the username when logging in. To finish registering, you will need to create a password and specify which project (a.k.a. “refuge”) you would like to join. After entering your name and email address, a dropdown list of available project codes will appear in Step 5. It is important to note that project codes only exist for projects already established within the AKN database. If your refuge or site has never participated in the AKN, or you are not sure if your project exists in the system, contact the [Inventory and Monitoring Data Manager](#) to determine if your project exists or to create a new project (please include “AKN” in the subject line). See page 4 about requirements for creating a new project.



## New User Registration

Please follow the seven (7) step process below to signup for a user account. When you see  below, click on it to get more information about that field.

**Step 1 -** Enter your name and email address. Your email address will be your user name when you log into the applications. (Point Blue personnel should NOT use this registration process, contact IT instead)

\*First Name  \*Last Name   
 \*Email Address   
 \*Reenter your Email Address

**Step 2 -** Enter a password or an OpenID for logging into your account (not both). If you don't know what an OpenID is, enter a password.

Your New Password   
 Confirm Your New Password   
 or  
 Your OpenID   OpenID icon   
[Go here](#) to find out more information about  OpenID icon OpenIDs and where to get one.

**Step 3 -** Next, provide additional information about yourself.

\*Your Organization   
 Address   
 City  State  Zip   
 Country   
 Phone Number  ext

**Step 4 -** See if the organization you work for is listed below. This will determine the visual style for your application. If your organization isn't listed below, select Default.

\*Choose your organization or Default  Select "US Fish and Wildlife Service"

**Step 5 -** Enter the project code for the project you want to join. This field is required. Contact the specific Project Leader for your project if you do not know it.

\*Project you wish to join  Textbox will convert to a dropdown list of available AKN projects.

**Step 6 -** Enter any comment that will help us in processing your request.

Additional message  If Project Leader access is required, add request in the message box.

Once your registration is submitted, an email will be sent to the Project Leader of the project you selected, prompting them to approve you with either *Biologist* or *Project Leader* access. Point Blue will then create your account with access to the approved project.

**!** Anyone requiring access to the database for the purpose of adding/editing data or managing projects MUST have a registered user account.

## Requesting Access to Multiple Projects

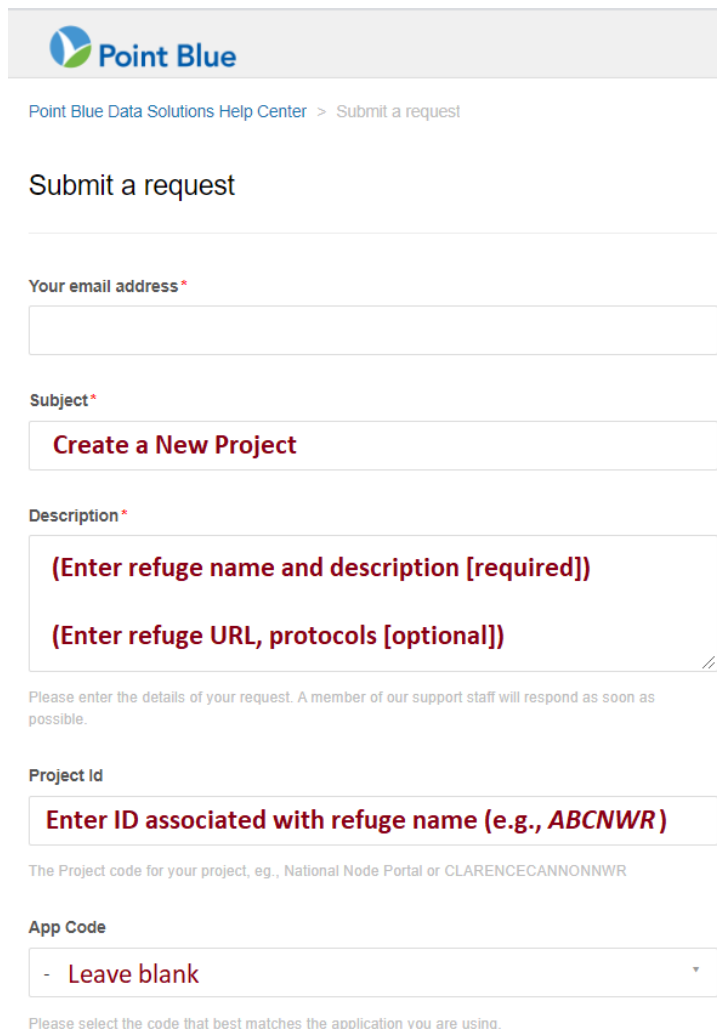
You may request access to other projects by listing the additional projects in the message box of *Step 6* on the registration page. The Project Leader(s) will receive an email stating that you wish to access their project(s). Alternatively, if you know the Project Leader, you may contact them directly to request access to their project. If you have already registered but do not know the contact information of the Project Leader, you may contact the [Inventory and Monitoring Data Manager](#) who will relay your request to the appropriate person.

## Creating a New Project

When a new project needs to be created, provide the following information to the [Inventory and Monitoring Data Manager](#) (items with \* are required):

<u>Parameter</u>	<u>Example</u>
<b>*Name of the Project (Refuge):</b>	<i>ABC National Wildlife Refuge</i>
<b>*Project Identifier:</b>	<i>ABCNWR</i>
<b>*Description:</b>	<i>Location; landscape type (sagebrush steppe, tallgrass prairie, etc); Cost Center Code, etc.</i>
(optional) Protocols:	<i>IWMM Ground Survey; Point Count (3min with unlimited distance)</i>
(optional) URL:	<i>https://www.fws.gov/refuge/ABC/</i>

Another option is to fill out the [AKN Zendesk form](#). This is the same form that appears when clicking the *Help* icon located in the bottom-right corner of the [AKN website](#). Enter “Create a New Project” in the *Subject* textbox and the required/optional parameters in the *Description* textbox.



The screenshot shows the 'Submit a request' form on the Point Blue Data Solutions Help Center. The form includes the following fields and instructions:

- Your email address \***: A text input field.
- Subject \***: A dropdown menu with 'Create a New Project' selected.
- Description \***: A large text area containing the instructions: '(Enter refuge name and description [required])' and '(Enter refuge URL, protocols [optional])'.
- Please enter the details of your request. A member of our support staff will respond as soon as possible.**: A note below the description field.
- Project Id**: A text input field with the instruction: 'Enter ID associated with refuge name (e.g., ABCNWR)'. Below this field is a note: 'The Project code for your project, eg., National Node Portal or CLARENCECANNONNWR'.
- App Code**: A dropdown menu with 'Leave blank' selected. Below this field is a note: 'Please select the code that best matches the application you are using.'

Once the project has been created it will appear in the dropdown list in Step 5 of the *Registration* page. New users will be able to select this project when they register. Also, projects can encompass a variety of observations and measurement techniques. Protocols can be added to the project at any time by the Project Leader.

## Logging into the AKN

Where you choose to login will depend on your database user title and purpose. The first option is through the *Biologists* portal at <https://data.pointblue.org/science/biologists>. Both Biologists and Project Leaders may use this portal to enter, edit, or proof data. If you are a Project Leader you may login through the *Project Leader* portal at <https://data.pointblue.org/apps/projectleaders> to set up study areas and management units, assign researchers, grant project access, review/publish data, and download data. There is also an IWMM portal at <https://data.pointblue.org/partners/iwmm/> that is an access point for all projects affiliated with the IWMM protocols. Regardless of which portal is used, the username and password (entered in the registration page) are the same.

## Biologists Application

In the [Biologists application](#), select the project in the list on the *Project Selections* page, and then specify the type of observation (e.g., Point Count Surveys, Secretive Marshbird, Site Conditions, etc.). The Projects window contains a list of projects you are affiliated with. Also, there is a separate [IWMM Portal](#) link to work with data related to the Integrated Waterbird Management & Monitoring (IWMM) protocols.

The screenshot shows the 'Biologists' application interface. At the top, it says 'Biologists' with a home icon and 'Project: HATCHIENWR (Biologist)'. Below this is a 'Welcome to AKN Biologists' message and a description: 'AKN Biologists is an application for entering and reviewing field observations in support of the Avian Knowledge Network, hosted by Point Blue Data Solutions'. The main area is divided into two columns. The left column, titled 'Projects', asks 'What project do you want to work in?' and lists several projects: DUMBIO - Test Project for trying out Biologists 2, GRANDCOTENWR - Grand Cote NWR, HATCHIENWR - Hatchie NWR (highlighted in blue), NEALSMITHNWR - Neal Smith NWR, and WINFIELD - WINFIELD. The right column, titled 'Project Observation Types', asks 'What type of observations would you like to work on?' and lists: IWMM Portal (highlighted with a red box), Point Count Surveys, and Site Conditions. Below this, there are links for 'Locations and Sampling Units' and 'Get GPS files or maps for Project'.

If you are accessing the *Biologists* application with Project Leader credentials, you will have additional links included in the *Project Management Tools*. Selecting one of these options will bring you to the *Project Leader* application to manage your project and data.

The screenshot shows the 'Biologists' application interface for a Project Leader user. At the top, it says 'Biologists' with a home icon and 'Project: WINFIELD (Project Leader)'. Below this is a 'Welcome to AKN Biologists' message and a description: 'AKN Biologists is an application for entering and reviewing field observations in support of the Avian Knowledge Network, hosted by Point Blue Data Solutions'. The main area is divided into two columns. The left column, titled 'Projects', asks 'What project do you want to work in?' and lists several projects: DUMBIO - Test Project for trying out Biologists 2, GRANDCOTENWR - Grand Cote NWR, HATCHIENWR - Hatchie NWR, NEALSMITHNWR - Neal Smith NWR, and WINFIELD - WINFIELD (highlighted in blue). The right column, titled 'Project Observation Types', asks 'What type of observations would you like to work on?' and lists: IWMM Portal and Site Conditions. Below this, there are links for 'Locations and Sampling Units' and 'Get GPS files or maps for Project'. A new section, 'Project Management Tools', is highlighted with a red box and contains several links: 'Manage Sampling Units for Project', 'Download Locations to GPS, GIS and more', 'Manage Protocols for Project', 'Protocol Research', 'Assign Researchers to Project', 'Registered User Search', 'Download Observations', 'Data Sharing Levels', and 'Analyze Observations'.



Further information about the *Biologists* interface can be found in **AKN Help Guide 6: Biologist Application**.

## Project Leader Application

Navigate to the *Project Leader* home page at <https://data.pointblue.org/apps/projectleaders/>. The *Project Leader* page provides links to various administrative management tools.



## Project Leader

Home Sampling Units Field Observations Project Definition

Today is 30-Jan-2021

### What you can do in Project Leader?

#### Sampling Units

- **Download** - Get Project and Sampling Unit reports, maps and data.
- **Create and Manage** - Create and edit Sampling Units (geographic units for collecting field observations) including drawing geometry on a map or locating using GPS data.

#### Field Observations

- **Download** - Get Project observation data in different formats.
- **Set Data Sharing Levels** - Set data sharing levels for observation data.
- **Review Point Counts** - For reviewing Point Count observations for a Project and setting level of availability.
- **Review Area Searches / Area Surveys** - For reviewing Area Search / Area Survey observations and setting level of availability.
- **Review Transect Counts** - For reviewing Linear Transect observations and setting level of availability
- **Review Marshbird and Nightbird Counts** - For reviewing Secretive Marshbird Count and Nightbird Count observations and setting level of availability
- **Review SF Bay Rail Point Counts** - For reviewing San Francisco Bay specific Rail Point Count observations and setting level of availability

#### Project Definition

- **Add Researchers** - For creating new Researcher.
- **Edit Researchers** - For updating Researchers.
- **Researcher Access** - For setting which Researchers have access to a Project, whether they are active or inactive, and whether they are a Project Leader or not.
- **Protocols Used** - For setting which Protocols can be used when adding new observation data to a Project.
- **Check User Status** - Check the status of Researcher by email address, including fixing registration problems.

The links will initially take you to a webpage containing a list of available projects within the AKN. Scroll or type the first few letters of a project ID to locate the project where you wish to perform management activities, select the project in the list, and then click **enter**.

\*Select your project

Select a project...

- ABCCONIFERNPLCC - ABC\_Conifer\_NPLCC
- ABCOAKSNPLCC - ABC\_Oaks\_NPLCC
- ABCPRAIRIENPLCC - ABC\_Prairie\_NPLCC
- ABCRIPARIANNPLCC - ABC\_Riparian\_NPLCC
- ABCSHRUBNPLCC - ABC\_Shrub\_NPLCC
- ABERDEEN\_PROVING\_GROUND - [DOD\_ARMY] Aberdeen Proving Ground
- ABSECON - Absecon
- ADM - Audubon Drought Monitoring
- ADOB - Adobe Valley

enter

You will be taken to the web interface corresponding to the administrative tool link that was initially selected.

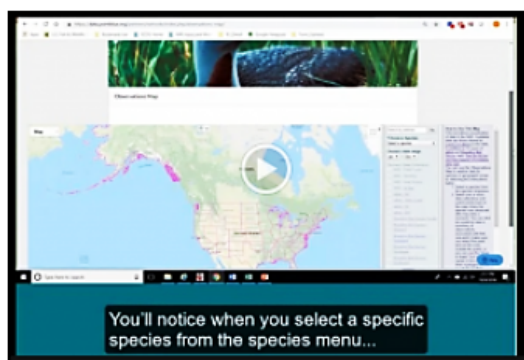
## Protocols

The AKN database uses the term ‘protocol’ to describe the various survey methodologies (i.e., observation methods) it supports. These methodologies include approved National Inventory and Monitoring Protocol Frameworks, such as the *Landbird Protocol* (Knutson 2016), as well as other survey methods. The AKN has a variety of protocols to select from that define point count, secretive marshbird, and area survey observation procedures. Project leaders can refer to the **AKN Help Guide 2: Adding Protocols to a Project**.

## Additional Help and Training

The [Avian Knowledge Network](#) website provides resources for understanding the database and available tools for managing a project and performing analysis. Additional training materials for new users can be found on the [AKN Tutorials and Guidance](#) webpage, including videos and other help documents.

### AKN Video Tutorials



- About the AKN
  - [AKN 101](#)
- Data Management
  - [Setting up a project in the AKN \(Project Leader Application\)](#)
  - [Using the AKN Biologist application to enter data](#)
  - [Managing and adjusting data sharing levels](#)
  - [Using the Bulk Uploader – Overview](#)
    - [Bulk Uploader – Preparing Data](#)
    - [Bulk Uploader – Formats and Transforms](#)
    - [Bulk Uploader – Using the Bulk Uploader Interface to Upload Your Prepared Dataset](#)
- Exploring AKN Data
  - [Analyst Tool](#)
  - [Phenology Tool](#)
  - [USFWS Information for Planning and Consultation \(IPaC\) tool](#)
  - [Observations Map](#)
  - [Data Downloader](#)
  - [Data Catalog](#)

You may also contact the [Inventory and Monitoring Data Manager](#) for further assistance.