Use of Observation.org for collecting IWC data from the observers

Introduction

This manual contains information to use Observation.org for waterbird monitoring counts. Chapter 1 gives information for the National Coordinator of the International Waterbird Census. Chapter 2 information for observers who are going to enter waterbird count data in Obervado.org. A comprehensive description of the functions is provided, but the title of essential chapters for the IWC counts or managing the site for IWC counts will be in red.

The purpose of adapting the Observation.org to the special needs of the International Waterbird Census is to help national IWC coordinators in collecting the IWC count data from their observers and to make it easier to store and quarry the data in countries without their own data management system. National IWC coordinators can use the Observation.org system for this purposes free of charge and this will not affect their relationship with Wetlands International. This means that national coordinators will remain responsible for quality control of the data sent in by the observers and will need to submit the consolidated data to Wetlands International through the IWC Online application. They remain the central focul point for Wetlands International.

Having stated this, it is important to note as well that because of the 'house rules' of Observation.org, in principle the observers themselves, can decide who can use their data according to their general agreement made in their settings (see My Observation.org / Who may use my data?). However the organization responsible for Observation.org (Stichting Natuurinformatie) have stated in their contract with Wetlands International that ' notwithstanding the permissions granted by individual observers, Stichting Natuurinformatie, shall refrain from undertaking projects or making available the data to third parties in direct or indirect competition with Wetlands International and/or its national partners represented by the local administrators appointed by Wetlands International'. This also means that despite user rights granted by individual observers, the National coordinators of the IWC decide what can be done with the Waterbird count data as collected with the IWC tool in Observation.org.

Read me before you start

To test the IWC functions on Observation.org, you can use the link to the Swaziland IWC test site only, which you can access at the following URL: http://iwc-swaziland.Observation.org/waarnemingen_all_wg3.php?groep=1

Currently, the IWC functions are not yet available for other subsites of the Observation system. Other countries will be enabled as national coordinators of the respective countries express their willingness to use the Observation.org system for collecting the data from their own observer network. In that case, the staff of Wetlands International and Observation.org will assist the national coordinators to set up the system for their country.

To test it as a national coordinator

To test the IWC functionalities as a national coordinator we suggest that you **sign in** using the following credentials:

username: iwcnc
password: wetlands

This way (i) you will be able to use local administration functions and (ii) we will be able to separate all test data and delete them from the database. (However, please note that all the observations you enter will have the name IWC NCtest.

Important!

1. **Never share this username and password with observers.**

2. **Do not change the user name or password because that would make this account unusable to other national coordinators while testing.**

3. **Never change anything that is marked as not to change in this document. Your changes will affect all other test users.**

To test it as an observer

To test the IWC functionalities as an observer, you can give the following credentials at trainings:

username: iwctest
password: iwc

This way (i) you will be able to let observers to test the system without the need of registering and (ii) we will be able to separate all test data and delete them from the database. (However, please note that all the observations you enter will have the name IWC Otest.

Important!

1. **Do not let the observers to change the user name or password because that would make this account unusable to other test users.**

If observers want to start using Observation to record their own real data, they can register using the Create account link on the top right row. **Be careful, the user name should not contain any space while the (real) name should contain at least one space.**

Chapter 1: Functions for national coordinators

All functions available for the observers will be available for national coordinators as well. Therefore, we only describe the special functions reserved for national coordinators (local administrators). Some functions, such as translations of text and adding sites are reserved to other types of administrators and will be described separately.

Localisation of the Observation.org system

Localisation means that the generic Observation.org system is adapted to the specific needs of the country. This process involves the following tasks:

(1) **Appointment of local administrators.** The region administrator should first register on the Observation.org and shall inform Wetlands International (iwc@wetlands.org) about his interest of setting up a regional working group for the IWC. Wetlands International will facilitate the link with the Observation team.

(2) **Set up the Observation.org for your working group.** This includes:

   a. Drawing the workgroup area using the Regional Admin Options\draw polygon. (This might be necessary in exceptional circumstances when the workgroup area is smaller than the country. For example, when a country has been split such as Sudan and South Sudan in the recent past or when the territory organises counts independent from the country such as it is the case for example in St Helena).

   b. Changing settings that affect the appearance and operations of their subsite using the Regional Admin Options\Region Settings, List of species groups, Edit Menu Overviews menu points (see more details in the section Regional Admin Options below).

   c. Setting up and modifying the country list. Adding species to the country list can be done using one of the following menu points: Overviews\observed species list, Overviews\All species. Species from the country list can be deleted either from any of the above mentioned menu points or from Regional Admin Options\Maintain country lists.

   d. Setting local rarity status of species. This can be adjusted through Overviews\All species menu. This alerts the regional administrators to validate observations of rare species.

   e. Defining IWC count sites. This is an essential step as observers will be only able to submit observations This can be done only in collaboration with the Team Observation (info@Observation.org).

      i. If you do not have digitised IWC site boundaries yet, use the menu My Observation.org \my Areas. Click on the link create your own areas. In case of sites that are already in the IWC database add the name of the site as it is in the IWC database and add the international IWC code between brackets. The international IWC code consists of the two letters ISO code of the

country and four digits. It can be either looked up on the IWC Online database or checked with Wetlands International (iwc@wetlands.org). Following this draw the boundaries of the site according to the instructions on the screen and send an e-mail with the name of the site as you have entered on Observation to the Team Observation requesting them to enable them for IWC data submission.

    ii. If you already do have digitised IWC site boundaries, please send the list of sites in a table listing their name, IWC code and the name of each kml files that contains the IWC site boundaries together with the actual kml files to the Team Observation (info@Observation.org) with a copy to iwc@wetlands.org.

(3) Translate Observation into local languages (if necessary). The default language of Observation is English, but there is an ever growing selection of other languages including widespread ones such as French, Russian, Spanish, Portuguese and Arabic and it is possible to easily translate it into other languages as well. First check the availability and completeness of the relevant language versions for your country and if the languages of your country are not covered, contact the Team Observation for Translator authorisation.

Regional Admin Options

Region Settings: this menu allows changing the look and feel of the regional subsite. It is possible to change the following parameters, **but do not change them in the testing stage**:

1. The name of the workgroup as shown on top of every screen
2. Do or do not use the supplied menu
3. The background colour
4. The text colour
5. Letter type
6. Delete or alter the region admins
7. If submitting of observations is allowed
8. If submitting of observations is allowed for signed in users (If No all observations will be assigned to the workgroup user)
9. If submitting of observations is allowed for NOT signed in users (If Yes all observations will be assigned to the workgroup user)
10. Start with recent rarities. If No, the link will start with sightings not with recent rarities. This needs to be set to Yes, if the regional administrators prefer to show news items on the start page. In that case, News will be shown under the recent rarities.
11. You can enter 4 extra links which will be showed in the menu.

List of species groups: The national coordinators can:

1. Select the species group for which it is possible to submit data through the subsite. Set in the first column 1 for species groups data submission is allowed, 0 for the ones data submission is not allowed. In case of IWC subsites, Birds should be set on 1 and all others on 0.
2. Determine the way list of observed species shown under the Observations menu. It is possible to change the listing method (sequential, per day, per day and ordered by area name) and to

3. Determine the order in which the species group appear under the Observations menu. In case of IWC subsites, this setting is not relevant as only Birds will be shown.

*As in case of the previous menu**, please do not change the setting in the testing phase!***

Edit Menu Overviews: allow switching on and off certain menu points on the Overview menu. E.g. national coordinators can deactivate menu points they do not want to offer for their observers. Currently, the Phenology is deactivated as it is less useful in Africa. To change the setting of a menu item, just click on it in the list and switch on or off the tick box. ***Please, do not change it at this stage!***

Draw polygon: This allows modifying the boundaries of the workgroup area. ***Please, do not use this function in the testing phase.***

Local dissenting rarity: provides an overview of the rarity status of the species in the workgroup area. It makes it possible to modify rarity status, e.g. make rare species very rare within a given time period or to delete the species from the rarity list. Species can be added to the local dissenting rarity list from the **Overviews\All species list** (see description of the procedure there).

Observation review: This menu list all observations of species that are on the local dissenting rarity list. The national coordinators can use this screen to review the observation by clicking on the **Date** of the observation. This will open another window with the details of the observation and with various validation options and a box with standard texts. The national coordinator can click on the appropriate text which will immediately appear in the comments box. When happy with the text, he can send it by clicking on OK. He can also select one of the validation options listed in the right hand column, i.e.:

- Unknown

- Not approved

- Under investigation

- Cannot be validated (yet)

- Approved very likely this species

Comment review: (Unfortunately this section is only in Dutch). Provides an overview of the reviews started by the reginal admin.

Export: Produces an export of ***all IWC counts within the defined time period*** in the format required for upload on the International Waterbird Census database in CSV format. After opening the file in Excel it can be also saved in Excel format.

News: Provides opportunity to post news such as the date of upcoming national or international counts, trainings, reporting deadlines, etc. Remember that the option Start with Recent Rarities should be set to Yes to be able to show news on the start page.

Maintain projects: It can be set what Observation projects (such as the IWC) the working group participates. This option might be used for setting up appropriate reporting forms for other special

schemes. If you wish to do so, contact the Team Observation to discuss the opportunities. ***Do not change the settings here in the testing phase***.

Maintain country list: This allows removing any species from the country list that appears on the IWC count form. This can be used to make the list shorter. Species can be added back to the list using the **Overviews\All species menu.**

Overviews

Basically, the same overviews are available to national coordinators as to the observers. As it has been mentioned above the content of this menu can be changed in the [Edit Menu Overviews](#).

However, there are some specific functions for the national coordinators both under the observed species list and under the All species menus to manage their national lists and the rarity status of each taxa. The first column following the information (ⓘ) column allows setting the **local dissenting rarity** status, while the next column allows adding or removing a taxa from the **national list.** With the ⊕ button the taxa can be added while with the ✖ it can be removed from the local dissenting rarity or from the local (i.e. in this case of IWC projects from the national) list.

Through the observed species list only species already observed in the working group area can be changed, which can be useful to access the species with actual data. Additional useful functions here are the various filters.

Through the All species menu, it is possible to access all species not only the ones already having records in the Observation.org database for the working group area. This might be more useful at the initial set up. However, even this list can be further filtered by any part of the name of the taxa, by family, by rarity status, whether they are listed on the country checklist or whether they are on the international IWC list and with the combination of these.

Regional administrators can use these functions to customise the list of taxa that will be shown on the IWC count form.

Chapter 2: Functions for observers

How to become an observer able to use Obervado.org for waterbird counts

Details for using the test logins are provided in the beginning of this manual. To create your own personal observer account:

1. Open Observation.org (http://Observation.org)

2. Create an account for yourself on Observation.org (see upper right menu on the first page: Create account). You have to choose a user name, give your name and email adres. Note that with select language you can choose the language of this page. After submitting the information you will receive your personal password through email.

3. Let your National coordinator know which site/counting unit(s) you are going to count. The national coordinator needs a map with the boundaries of the site/counting unit(s) which you are going to count. On the basis of this map the site/counting unit can be included in Observation.org.

4. You will receive an email from your national coordinator with the Url for the International Waterbird Census for your country. Put this Url in your browser and enter your user name and password (see 2 above).

Add an IWC count

There are three options to start adding an IWC count:

1. From the Add\New IWC visit,

2. From the External links\Add IWC count,

3. From the Overview\Areas menu

All will take the observer to the List of areas page. Click on the contextual add button () which will open the entry screen for a new IWC count.

On the IWC count screen, select the date of the observation either by typing in the year, the month and the date or selecting the date from the calendar and then hitting the Confirm selection button. From this point, the form should work off-line until you hit the submit checklist button.

The heading of the form contains the standard fields for recording information which is related to the count in general such as coverage, water, tide, ice, weather, disturbed, method and optics. There is also opportunity to record the name of co-observers and to add remarks concerning site conditions, threats and conservation measures. The latter is important to help explaining the results for IBA monitoring.

Following this, you can enter the numbers observed for each species. The form also makes it possible to record species which were observed, but not counted (mark them by entering -1). In addition, it is possible to indicate the quality of the count (i.e. real count, estimate, extrapolation or unknown). It is assumed that the default value is real count. Observation of escaped birds can be marked by ticking the checkbox next to the blue Esc flags.

The data form contains all waterbird taxa as specified by the national coordinator (including subspecies and multispecies categories in red). Any changes to this list need to be made by the National Coordinator. Species not on the count form but which you want to send in as well, especially important for any waterbird species which is not on the form, should be sent as casual observations (see below).

Important data entry conventions:

1. **The system also assumes that species with no entry were not observed (i.e. using the passive zero method to register absence, while requires active registration of presence but no count with -1).**

2. **If no bird were observed, either enter any birds still observed or enter Unidentified bird with 0. (Both options will create a visit with passive zero values for waterbirds).**

Once finished entering observations, hit the Submit checklist button at the bottom of the page.

The list of species already submitted for the visit will appear under the Already seen by me heading. This design allows stopping data entry and submitting the data even if the list of birds is only partially entered and continue the data entry later.

In this section, the name of species with counts larger than 1 will appear in blue. Clicking on the blue names will allow the observer to add more information on group composition. This can be especially useful to record e.g. sex ratio or number of adults and juveniles (i.e. it supports demographic monitoring).

Completing an existing IWC count

It is also possible to add additional observations to an existing IWC submission. This can be done using the My IWC counts under the My Observation.org menu. Select the observation you want to complete and click on the ⊕ button. This will open the screen with the list of species already with data entered on the left side of the page under the title Already seen by me and species without data on the right side under the heading 'Did you see these species?' It is possible to add change group composition for existing records as described in the previous paragraph, but it is not possible to change the total numbers directly from here. To do that the observer will need to find the relevant record and edit it is as described under the heading My Observations below.

Other functions for observers

Add casual sightings

If someone is registered as a user to Observation, it is also possible to record any other observations from any groups and from any countries not only the ones he is registered. Casual records can be entered through the menu Add\Sighting. After filling in the data for the record and submitting the

record, additional links for editing, adding photo, adding sound, external link or information on group composition appear. Note that through the IWC subsite it is only possible to enter bird observations. Observers who wish to record observations from other groups as well should log in to the Observation.org site (http://Observation.org/index.php) and record their observations through that.

It is also possible to use the following mobile applications:
1. ObsMapp (http://obsmapp.org/) for Android phones
2. WebObs (http://webobs.org/) all other mobile devices including iPhone and BlackBerry.

Important! Observations submitted as casual records through an IWC subsite, Observation.org or through the mobile applications will be <u>not</u> included into the exports to IWC database, but will be available for the user and in the overviews. In exports, IWC counts are marked as iwc count in the TYPE_OBSERVATION column. This is to separate IWC counts from casual records.

My Observation.org

This menu provides access to various user specific options which are useful for the observer to retrieve his own data.

My Observations: produces a list of all records entered by the observers. The data can be filtered using text search, by date, species group, rarity, certainty, approval status, etc.

- The ⓘ button at the beginning of the row opens up a screen with the details of the observation.

- Species name: Clicking on a species name from the list opens up a screen with all records of the observer for that particular species.

- Area name: Clicking on an area name the opens up a screen with all records made by the observer at that area.

- Statistics (📊): Clicking on this button opens up a screen that provides some basic statistics concerning the number of observations and number of individuals observed by month and year that meet the criteria set at the top of the screen.

- Edit (✏️): Clicking on this button allows the user to edit the record.

- Add photo (🖼️): Clicking on this allows the user to upload photo(s) at a later stage than at data entry.

- Add sound (🔊): Clicking on this button allows the user to upload sound recording(s) at a later stage than at data entry.

- Delete in batch: it is possible to delete multiple records by ticking the checkboxes next to selected records and then clicking on the delete selected observations link at the bottom left corner of the screen. This might be useful when some common settings for an entire IWC count were entered incorrectly and it would be easier to re-enter the data rather than editing all records individually (e.g. using a wrong date).

- Delete (): Clicking on this button allows deleting an individual record.

My Photos: retrieves the photos uploaded by the observer that meet criteria set in the filters at the top.

My List: Enables a user to get an overview of his own species list from a certain group, for selected years, months, provinces, in certain categories of rarities and by behaviour. The list can be presented in taxonomic order or in the order of the first observation of the species. The latter might be useful counting the new species.

My List (Compare Years): This function provides a list of species seen by the observer in the selected years and allows comparing years. This function works only on all observations of the observer and not possible to set other filters (e.g. provinces, behaviour, etc.).

My List (Months): This menu gives the opportunity get a quick overview about the months when a certain species was recorded by the observer.

Profile: Presents some details of the observer and the total number of records the observer has submitted.

New Alert: It is possible that observers set alerts either for certain rarity categories (e.g. >= rare). The observer gets an e-mail alert if a species in that rarity category or above (i.e. in this case a rare or very rare one) is observed. It is a useful function for observers interested in twitching. Alternatively, alerts can be set for a single species as well.

Important notice: As alerts can attract twitchers, it might be important to set embargo and/or obscure location in case of sensitive situations.

My Alerts: This provides a list of alerts set by the observer. (Unfortunately, currently the list of alerts will be in Dutch). Alerts can be deleted by clicking on the Verwijder button.

Export: This function enables the observer to back up or export into other systems his own observations. It is possible to export all observations, observations of a group (e.g. birds) or a certain species (unfortunately, the species list is in Dutch only). It is possible to download data in an extended or in a simple table. In both cases the export will be in CSV format that can be opened with Excel or can be exported into Google Earth, Google Map or GIS software. The settings will take effect after hitting the Refresh button. The resulting dataset can be downloaded by clicking on the blue hier word in the 'Klik hier on de download te starten" text under the Refresh button.

My IWC counts: This menu function provides access to all IWC counts submitted by the observer using the IWC form.

- Information (): Clicking on this button opens up a screen that summarises the IWC count.

- Mutate IWC count (): Clicking on this opens up the IWC count form for the given visit and enables editing the visit data (except the date) or adding new entries. (**Note that amending the numbers will be not possible from here. Records should be opened up for editing from the My observations screen).**

- Export (): Exports the IWC count in the standard format as it can be exported directly into the International Waterbird Census database. **(Note however, that national coordinators using the Observation.org to collect IWC data will be able to export all IWC data directly. Hence, there is no need to ask observers to export their data in this format)**.

My areas: This menu point allows the user to define the boundaries of his areas (max. 10). This is a useful function to collect IWC site boundaries from the observers. There are detailed instructions on the screen. The kml file of the site can be exported.

Overviews menu

This menu provides some contextual information that might be useful for observers.

Observed specieslist: This menu point provides the list of all species observed in the area covered by the Observation.org subsite, i.e. mostly in the country. The list looks the same as on My list with the difference that it uses all observations and not only the observations of only one observer.

All species: provides access to the list of all species. (In case of an IWC subsite of Observation.org only bird species will be shown as default). If a species is selected from the list, its observations from the country, their map, statistics and photos will be also available if there is any.

Statistics: basic statistics of the number of records and species observed by taxonomic groups, i.e. birds, plants, etc. In case of IWC Observation.org subsites, there will be only birds listed here.

Areas: opens a table with a list of sites listing their identification number, name, the name of state or province and country where they are located, the type of the area (i.e. area or province) and the following icons:

- Statistics (): Clicking on this icon opens a page with some basic statistics such as the number of species for a selected species group in a selected year.

- Information (): Clicking on this icon links to the information page of the site which shows the boundaries of the site with some information and provides opportunity to upload photos about the area. Overlapping areas are also listed here which can be the country, provinces or protected areas.

- Contextual add button (): On this screen, this will allow adding a new IWC count.

- Export (): Clicking on this will export a kml with the site boundaries.

Map of areas: this provides an overview of the areas, i.e. IWC sites.

Photos: all photos taken within the workgroup area. The photos can be filtered using a set of filters similar to the photos of individual observers.

Sounds: all sound recordings from the workgroup area. They be filtered using a set of filters similar to the sound recordings of individual observers.

Twitcher: this function might be interesting to observers who are interested in observing as many species as possible. Species not yet recorded by the observer in a given period can be listed. Species

within the last 7 days can be compared to the life list, year list and month list of the observer. Besides of looking for rarities, the month list function can also provide useful warnings for species that arrive in a certain period and observers can pay particular attention to finding them on their area.

Ranking: produces a list of observers in order of the number of species they observed. In addition, it allows the observer to compare his species list with anybody else's list on the list.

Trends: it produces dynamic maps of occurrences as it changes in max 15 intervals. Intervals can be weeks, days, months or years. In countries with relatively few observations, this function will be more useful using longer intervals and mainly after a couple of years. E.g. after 3 years the changes in the distribution of White-faced Whistling Ducks at IWC sites can be quiet interesting. Entering/importing historical data can further increase the usefulness of this function.

Highest ranking pictures: this function shows the most popular pictures from the workgroup area. It encourages observers to post their pictures on the website and, in turn, that helps finding photos about species or areas.

Observations

Useful overviews are accessible through this menu point. First a list of species observed appears in chronological and taxonomic order. Clicking on the name of the species opens either the details of the observation, if there is only one record, or the list of observations on the particular day if there are more records of the same species on the same day. Clicking on the name of the species on the top of the page returns a complete list of observations for the species. Clicking on the name of the area, opens a list of all observations for the area. Both the species and the site related observations can be filtered by date, province, activity and appearance.

In cases of both species and sites there are further menu options in the upper right corner of the screen, which provide useful additional overviews.

About this species

It is possible to access all the observations, information about the species, maps showing the location of the observations, statistics and photos. (The use of the compare species function requires translation from Dutch).

The **statistic** option produces summaries of observations by months and by years and can be filtered by year, month, sex, plumage and activity.

About this area

It is possible to access information on the area, observations, photos taken at the area, a species list (which can be filtered by family, rarity, date, etc.) and statistics (i.e. species number by month, which can be also filtered by year).

About this user

This appears when My observations are listed (and showing the information for the user himself) or for any other user through the Overview\users or by clicking on the name of a user on the observation list. The submenu's offer access to the profile of the user, his observations, his photos, sound recordings, external links he provided in his profile settings, phenology, statistics (i.e. number of records per species group, list, list by months, user – area statistics, day lists submitted (unless it

enabled as a project, this is not applicable) and enables creating a relation with other observers. The latter allows these to see even the observer's hidden observations.