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# VOUCHER

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# VOUCHER USER MANUAL

Integrated Resource Management Applications  
Portal

(<https://irma.nps.gov>)

**SEPTEMBER 1<sup>ST</sup>, 2011**

**Amendment History**

Rev	Description	Author	Date
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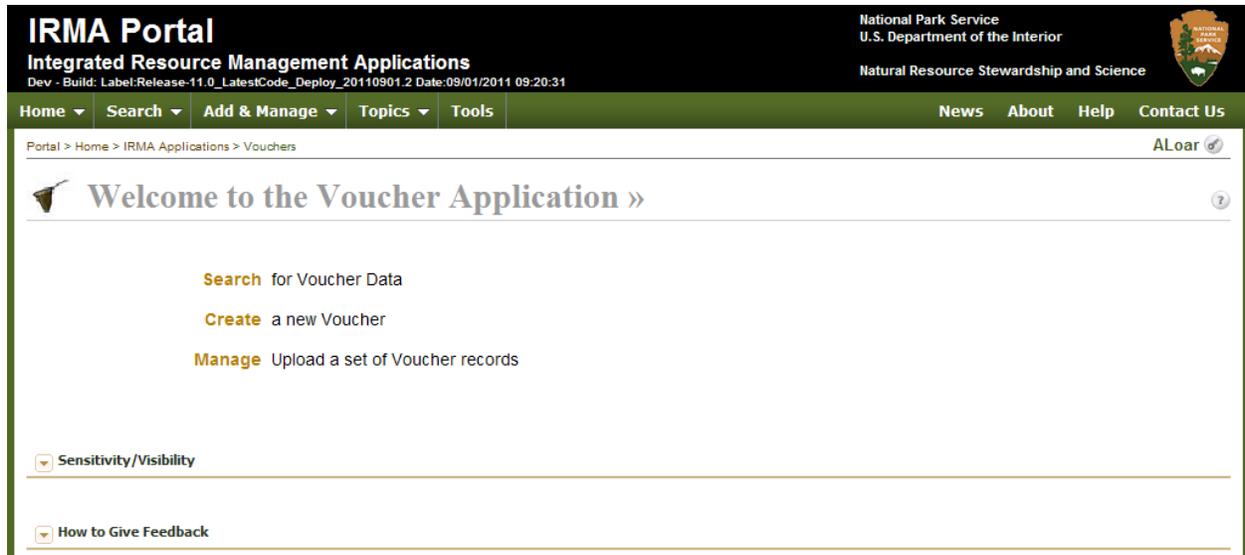
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## 1 Introduction

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This document is the comprehensive guide to all of the functionality for the Voucher 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 Voucher Application can be accessed from the Integrated Resource Management Applications (IRMA) Portal at <https://irma.nps.gov/App/Evidence/Voucher>. This Welcome page provides basic descriptive information about the application and navigation.



## 2 Voucher Application Basics

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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 voucher records were entered as supporting evidence of a species existence at a park. The voucher data was initially part of the NPSpecies database and application when it was first made available in 2000. During the NPSpecies redesign the voucher data was separated from NPSpecies and made into its own stand alone system to simplify application scope, however direct links from NPSpecies to vouchers exist.

### 2.1 What is a 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 the organism), photo image (i.e. digital or hardcopy), DNA sample or etc.

### 2.2 What is the Voucher Application?

The voucher database stores voucher records of taxa for any park unit and the application makes these records searchable and accessible via the IRMA Portal. The voucher records are used as proof that a species exists at a particular park. The records are metadata for the recorded voucher, which in most cases are physically stored in museums or herbariums. For those with the appropriate permissions the voucher data can be added to, and edited.

### 2.2.1 Where do I find the Voucher Application?

- 1) From the main IRMA Portal Page (<https://irma.nps.govApp/Portal>) click on the Home menu.
- 2) Hover your mouse over IRMA Applications and then click on Vouchers.



### 2.3 What is the scope of the Voucher Application?

Only data about vouchers collected on or possibly near parks are stored. The application allows users to search, add and edit these voucher records. These records can be used by the NPSpecies application to link voucher records to park-species profiles or may be stored here without linking to NPSpecies.

### 2.4 What are the supporting applications used with the Voucher?

The Voucher 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 IRMA Portal.

For more information about these applications see their user manuals.

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

### 2.5 Who manages voucher data?

When vouchers were integrated with NPSpecies the NPSpecies Points of Contact (POCs) were stewards of the voucher data along with the NPSpecies 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 voucher data as well.

For data errors found in Voucher, 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. Since that time records have been added and modified. 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 museum and herbarium records resulted in species identified with historical taxonomy used at the time of the specimen collection. 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 accepted taxonomic name.

## **2.7 What is the quality of the information?**

The voucher records are not an exhaustive list of all vouchers taken from 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 [irma@nps.gov](mailto:irma@nps.gov).

## **2.8 What is location identifying information?**

Many voucher records also have information that indicates the location that the voucher was collected, 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 field in the database that may contain information to make it possible for someone to find the location where a voucher was collected was designated as a location sensitive field.

### **2.8.1 Who can see location identifying information?**

Currently, the voucher 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 voucher records designated as appropriate for NPS staff and the public. Some voucher records will require a user to have further permissions before they can see the voucher record. If the voucher 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.

For more information on the visibility of observations, please refer to the section below entitled "Visibility of Voucher Data".

## **3 Searching and Viewing Voucher Data**

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There are currently only two search options and two different views of the data. The voucher data search results are shown in a table view with a small set of identifying fields displayed. Detailed information for a specific voucher record can be seen in the voucher profile view which is accessed by clicking on a specific voucher record in the search results table.

### **3.1 How do I search for vouchers?**

There are two search options quick search and search by code. Voucher quick search requires a scientific name and the park that the voucher was collected in. Search by code requires one or a set of the voucher code(s) that are the unique identifier for a voucher record. The search by voucher code is similar to the search by reference code in the Data Store.

### 3.1.1 Voucher Quick Search

Portal > Home > IRMA Applications > Vouchers > Search

ALoar

## Voucher Search

**Define Search Criteria**

Search Type: Quick

Unit: Arches National Park (ARCH)

Taxonomic Category: All

Name Type: Scientific

Name: Bromus

Search

To search using the voucher quick search follow these steps:

- 1) Select the Search Type of Quick.
- 2) Select the park Unit that you want to find a voucher for.
- 3) Optionally, select a specific Taxonomic Category (this can be left as “All”).
- 4) Select a Name Type to search, the options are Scientific, Scientific Name with Authority and Common.
- 5) Type in a name or partial name in the Name text box. You must enter at least 2 characters in the Name text field. Complex text strings can be composed using search operators (special characters), see section entitled “Enhanced Text Searching” below for more details.
- 6) Click the Search button to initiate the search.
- 7) 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 vouchers for the park you select will be hyperlinked.

Portal > Home > IRMA Applications > Vouchers > Search

ALoar

## Voucher Search

**Define Search Criteria**

Search Type: Quick

Unit: Arches National Park (ARCH)

Taxonomic Category: All

Name Type: Scientific

Name: Bromus

Search

Refine Search

Select Desired Scientific Name

Scientific Name	Common Name	Category	Rank	Classification Source	Code
<a href="#">Bromus carinatus</a>	California brome,moun...	Vascular Plant	Species	Integrated Taxonomic L...	40481
<a href="#">Bromus diandrus</a>	hopgut brome	Vascular Plant	Species	Integrated Taxonomic L...	40498
<a href="#">Bromus japonicus</a>	Japanese brome,Japa...	Vascular Plant	Species	Integrated Taxonomic L...	40479
<a href="#">Bromus tectorum</a>	cheat grass,cheatgra...	Vascular Plant	Species	Integrated Taxonomic L...	40524
<a href="#">Bromus</a>	brome,brome spp.	Vascular Plant	Genus	Integrated Taxonomic L...	40478

Page 1 of 1

Displaying results 1 - 193 of 193

- 8) Click on a hyperlinked scientific name. A results table with voucher records for the taxon and the park you choose will appear.

NOTE: If there are no voucher records for your particular species name of interest in a park then that name will not be hyperlinked. You may also not see vouchers for a particular species in a particular park if you do not have permission to see those vouchers due to their sensitivity level.

### 3.1.2 Voucher Search By Code

The screenshot shows the 'Voucher Search' page with the 'Define Search Criteria' section expanded. The 'Search Type' dropdown is set to 'By Voucher Code'. The 'Code' text box contains the values '1114570, 1114571'. A 'Search' button is located at the bottom right of the form.

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

- 1) Select the Search Type of By Voucher Code.
- 2) In the Code text box enter one or more voucher code values you are interested in looking at. If you enter more than one code separate the codes by a comma.
- 3) Click the Search button to initiate the search.
- 4) A results table will appear with the voucher record(s) 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 you will receive a message "No voucher records found".

The screenshot shows the 'Voucher Search' page with search results. A 'Disclaimer' message states: "This may not be all the vouchers for this species because all records may not be entered yet or you may not have permission to see sensitive records." Below this is a 'List of Vouchers' table with the following data:

Voucher Code	Voucher Date	Repository	Specimen ID	Collector	In Park Boundary	Sensitivity
1114570	08/28/2006	SEUG HERBARIUM CAB ARCH--Poac...	Catalog#=ARCH 3911; Accession#=ARCH-00315;	Moran	Yes	Authorized Access Only
1114571	05/02/1963	Southeast Utah Group Herbarium Cab...	Accession # = ARCH-00010; Catalog # = ARCH 584	Pitts	Yes	Authorized Access Only

At the bottom of the page, there is a pagination control showing 'Page 1 of 1' and a status bar indicating 'Displaying results 1 - 2 of 2'.

### 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.

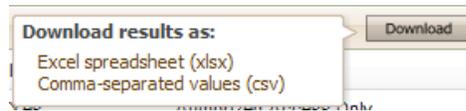
## Voucher Search

Expand Panel to Revise Search Definition

### 3.3 How do I download a set of voucher records?

The list of resulting voucher records from a search does not have the complete set of fields and values that are stored for each voucher 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 'Voucher Quick Search' or 'Voucher 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 a voucher results table?

To print a list of vouchers 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 and adjusting column widths. For more help using MS Excel, please refer to the Microsoft website.

### 3.5 How do I see a complete voucher record?

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

- 1) Run a quick search or search by voucher code (follow steps in sections 3.1.1 or 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 voucher code of the record you have chosen, this will open a new browser window with the voucher profile view of the record you have clicked. You will be able to go back to the results table view to look for other voucher records that you would like to view in more detail because the results table view is preserved in the original search browser.
- 4) The voucher profile has 4 tabs of data, the Events tab, Repository Tab, Location Tab and Record Information Tab. There is a data dictionary of all the fields for a voucher 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.

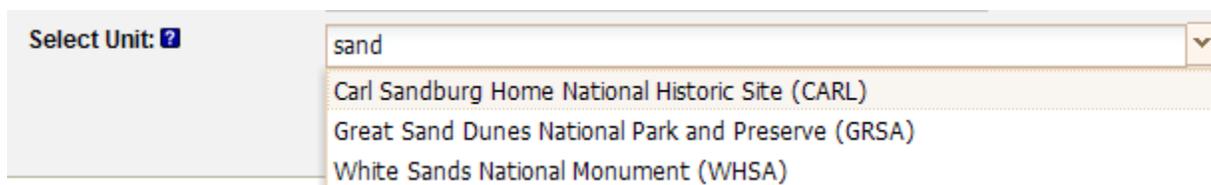
Other tips:

- 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

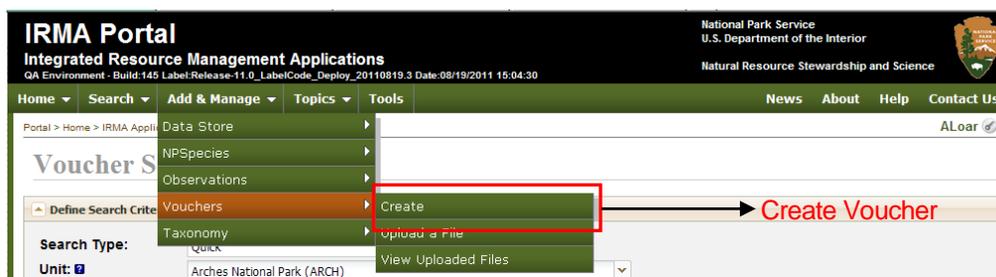
The single unit selector (simple drop down menu) allows you to choose a single unit to be included in a set of search criteria. You may start typing a Unit Name or Code and the drop down list will be filtered to those that match.



## 5 Creating and Editing Voucher Data

### 5.1 How do I create a new voucher record?

To create a new voucher record, go to the Add & Manage menu, hover over Vouchers. Click on the Create link.



You will then be lead through choosing a species and park that the voucher 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 voucher record?

When the create voucher 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.

**Select Taxon**

**Instructions**

- Search for a taxon on the Search for Existing taxon panel.
- If you are unable to find an existing taxon that meets your needs, expand the Create New Taxon panel and click the Create Taxon button.

**Search for Existing Taxon**

- Search for a taxon by scientific name by typing the name into the text box.
- Two characters will perform an "exact" match.
- Three or more characters will perform a "starts with"

**Search by scientific name:**

**Create New Taxon**

By typing in at least three letters in the Search by scientific name dropdown, you initiate a search for names that begin with the specified text that you entered. A list of possible results is returned. This list will narrow as you continue to type.

**Search for Existing Taxon**

- Search for a taxon by scientific name by typing the name into the text box.
- Two characters will perform an "exact" match.
- Three or more characters will perform a "starts with"

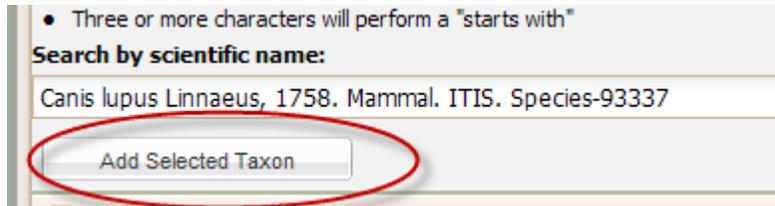
**Search by scientific name:**

canis lu

---

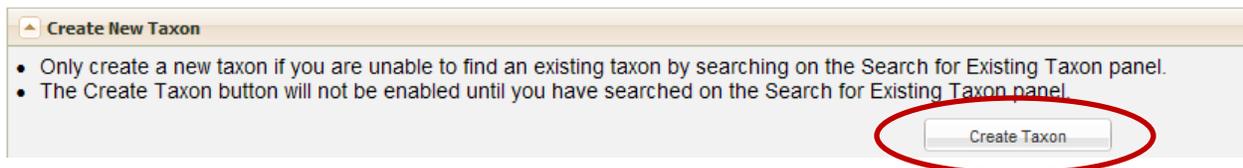
Canis lupus Linnaeus, 1758. Mammal. ITIS. Species-93337  
Canis lupus albus Kerr, 1792. Mammal. ITIS. Subspecies-632221  
Canis lupus alces Goldman, 1941. Mammal. ITIS. Subspecies-632224  
Canis lupus arabs Pocock, 1934. Mammal. ITIS. Subspecies-632226  
Canis lupus arctos Pocock, 1935. Mammal. ITIS. Subspecies-632228  
canis lupus asdif. Mammal. IRMA Animals. Subspecies-769052  
Canis lupus baileyi Nelson and Goldman, 1929. Mammal. ITIS. Subspecies-632230  
Canis lupus baileyi. Mammal. NPSpecies Semi-perm.. Subspecies-156582  
Canis lupus beothucus G. M. Allen and Barbour, 1937. Mammal. ITIS. Subspecies-632232  
Canis lupus bernardi Anderson, 1943. Mammal. ITIS. Subspecies-632234  
Canis lupus campestris Dwigubski, 1804. Mammal. ITIS. Subspecies-632236  
Canis lupus chanco Gray, 1863. Mammal. ITIS. Subspecies-632238

There will often be a number of taxa to choose from. When in doubt, it is recommended that you select name from ITIS. Click on the scientific name from the dropdown list to select it. Then click the Add Selected Taxon button to use the selected name for your new record.



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://irma.nps.gov/Content/help/Taxonomy/Create.aspx>



### 5.1.2 When do I select a park?

The single unit selector will appear after you have chosen a taxon. The list of parks in the single unit selector will only have parks that you have permission to add or edit records for.

## 5.2 When do I enter the rest of the voucher record information?

Once a species has been selected or created and a park has been selected the edit profile view appears so that the rest of the voucher record information can be entered. This view looks very similar to the voucher 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.

**Unique Voucher Identifiers**

Code:

Unit: Glen Echo Park (GLEC)

Scientific Name: *Falco sparverius*

Sensitivity:   Non-Sensitive  Authorized Access Only  Sensitive

### 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 voucher collection are displayed on this page such as the habitat the voucher was collected and the physical description of the specimen. Legacy fields may be ignored on this screen for new records; these fields should not be present in this view.

**Event Information** | Repository Information | Location Information | Record Information

Documented Scientific Name:

**Collector(s)**

Legacy Collector(s):  
Legacy Collector ID:

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

**Date/Time of Observation**

Date Collected:

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

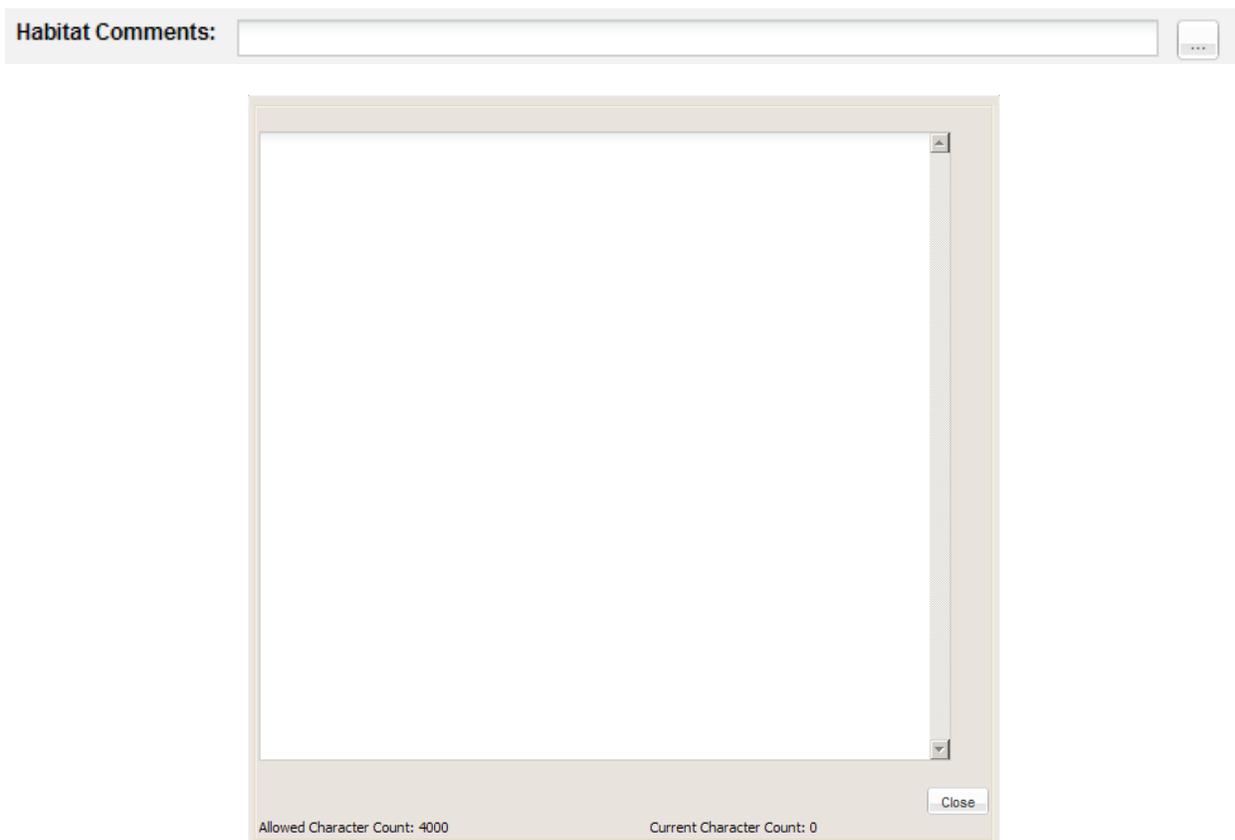
### 5.2.3 How do I enter data into a table in the voucher profile?

You will find 4 tables where you can add data to the voucher record. The collector table on the events tab and the repository, verifier and determiner tables on the Repository tab. Data entry for these tables is all the same. Table data entry makes it possible to enter more than one value for a particular voucher record, so a voucher can have multiple collectors, verifiers, determiners and be stored at more than one repository.

- 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 another 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. Note: Do not put html tags in these fields (i.e. `<html>`).



### 5.2.5 Repository Tab

The Repository Tab is for entering data associated with where the voucher is being physically stored and specifics on the voucher specimen itself, such as what type of voucher it is, details about the voucher collection

and who determined and verified the identification of the voucher. Legacy fields may be ignored on this screen for new records; these fields should not be present in this view.

There are three tables for data entry on the repository tab, for repositories, verifiers and determiners. The data entry tables work like the collector data entry table on the events tab. For more information on how to enter data in a table see section 5.2.3.

There are two extra dropdown options in the Repository field: Unknown and No Match. Use these if there is uncertainty about the physical location of the specimen. The data entry for the repositories has one other element that is not in the other tables. There is an option to enter a comment associated with each repository that is entered for a voucher record. To add a note, in the Repository table click on the large + plus sign in the row of the repository you have a comment or note for.



A pop up text box will appear allowing you to enter a note for that repository record.



### 5.2.6 What is the guidance on Vouchers for Images?

Select a Voucher Type = Image and if there is a copy of this image online add the URL to the Online Link field on the Record Information tab. Put all biological information into this IRMA Voucher record, such as habitat, physical description, and etc.

Then, optionally, create a Data Store record for the Image and store the details about the image itself there, such as quality of image, proprietary category, number of pixels, upload the digital image as a new holding location and etc. See Data Store help on creating references for images.

If you do create a Data Store record, you can then insert the Reference Code created into the voucher record on the Record Information tab, so that the voucher and the reference may be linked to each other.

The screenshot shows a web-based data entry interface with four tabs: 'Event Information', 'Repository Information' (selected), 'Location Information', and 'Record Information'. The 'Repository Information' tab is expanded to show four sections:

- Repository:** A section titled 'Legacy Repository:' with a 'Legacy Specimen ID:' label. Below is a table with columns: Notes, Repository Name, Catalog Number, Accession Number, and Storage Location. A '+ Add' button is in the top right.
- Voucher Type:** A section titled 'Voucher Type:' with radio buttons for Specimen, Image, Audio Recording, and DNA. Below are 'Details:' and 'Collection Method:' labels, each followed by a text input field and a dropdown menu icon.
- Determiner:** A section with a table for adding determiner records. Columns include: First Name, Middle Name, Last Name, Suffix, Determiner ID, and Title. A '+ Add' button is in the top right.
- Verifier:** A section with a table for adding verifier records. Columns include: First Name, Middle Name, Last Name, Suffix, Verifier ID, and Title. A '+ Add' button is in the top right.

### 5.2.7 Location Tab

The Location Tab is where information about the location a voucher was collected 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 collection 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 collection point.

Legacy fields may be ignored on this screen for new records; these fields should not be present in this view.

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 expanded to show three sections:

- Location Description:** Contains a "Description:" text field, 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 field.
- Geospatial Attributes:** Features a heading "Enter Only Latitude, Longitude Coordinates with Datum WGS84:" and three input fields for "Latitude:", "Longitude:", and "Coordinate Error:".
- Legacy Coordinates:** Lists several fields: "Datum:", "Latitude (DD):", "Longitude (DD):", "UTM X:", "UTM Y:", "UTM Zone:", "Coordinate", and "Error:".

### 5.2.8 Record Information Tab

The record information tab includes general comments and data source for the profile, 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 four tabs: 'Event Information', 'Repository Information', 'Location Information', and 'Record Information'. The 'Record Information' tab is active. Below the tabs is a section titled 'General Comments and Data Source' with a collapse icon. This section contains several 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. Below this section is another section titled 'Record History' with a collapse icon. This section contains four labels: 'Created By:', 'Created Date:', 'Last Modified By:', and 'Last Modified Date:'. Each label is followed by an empty input field.

### 5.2.9 How do I save my new voucher 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 scroll 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'. The 'Active' button is highlighted with a blue border. To the right of these buttons 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 voucher record?

To edit an existing voucher record you must first search for the record you want to edit using the voucher search options. For instructions on how to use the voucher search options go to section 3.1.

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

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

The Edit Voucher 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 to change the species name or park that the voucher record is for when editing an existing record. Second, when saving the record there will be different lifecycle 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. All information from legacy fields are correctly reflected in the new fields. 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 Voucher Profile View and no data changes that you made while in edit will be saved.

### 5.3.1 Legacy Fields

Some fields provided are from NPSpecies 1.0 and are called legacy fields. Legacy fields were used to store information in their original format so that they may be used to populate new fields. For example, Legacy Collector(s) and Legacy Collector ID were free form text fields in NPSpecies 1.0. An attempt was made in the final migration of data to parse information from these fields into the new collector(s) table.

All legacy field information will need to be checked in the new fields to ensure data migrated properly. This check can only be done using human eyes. No more automation can be programmed for this task. If the data did not migrate properly, those data will need to be correctly added/updated in the new fields.

WASO will be contacting each POC to devise a plan to help get these new fields correctly populated from the legacy fields.

## 6 Batch Importing Data

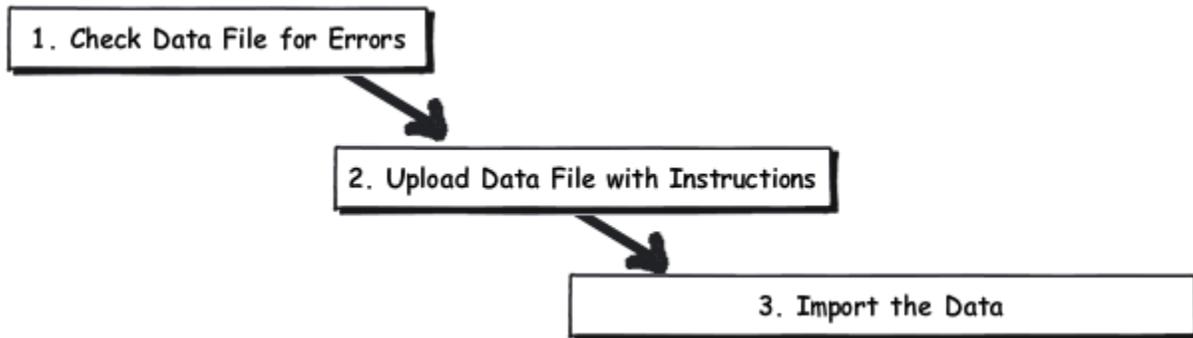
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Voucher data is often entered into an Excel spreadsheet or MS Access database on a biologist's desktop computer. To avoid extra work of requiring entry through the create voucher portal interface there is also an option to submit these files for POCs to import into the voucher database. Only POCs will have access to the voucher file upload page.

## 6.1 What is the procedure for importing data in batch?

It is highly recommended to do all data entry in the online version of the Voucher application rather than the legacy desktop version. However, you may have legacy desktop data files that need data loaded online. Follow these procedures to get those data out of the legacy desktop and into the online version the Voucher application.

To import Voucher data you must follow three basic steps 1) check the data file for errors, 2) upload a data file to holding area with importing instructions, and 3) import data from uploaded file.



POCs may upload data files for their parks and import the data into Voucher database.

## 6.2 What kind of data may be uploaded?

The import process is automated so there are some rigid requirements of data and formatting in order for the import process to work correctly. The file and format requirements are outlined below.

- 1) The data MUST include the Park Code.
- 2) The data MUST also include a field that has a clean scientific name or ITIS TSN. Clean refers to no embedded non name text other than spp. and var. for subspecies and varieties.
- 3) Please just one collector, if more need to be entered then additional collectors can be entered through the portal's edit voucher page.
  - a. The collector entered must be in the following format (First Name, Middle Name, Last Name, Suffix) with a comma between each name part to specifically identify when each name part ends (helpful for name parts with compound names i.e. Mary Jo or Van Horne).
- 4) Enter just one repository, if more need to be entered then additional repositories can be entered through the portal's edit voucher page
- 5) Coordinates will need to be entered in decimal degree Lat, Long using the datum WGS84. Use the tblObservation, tblVouchers existing lat, long fields for converted coordinates. If data are not converted the UTM coordinates will be places in the legacy UTM fields.
  - a. There is a coordinate conversion tool developed by the NRGIS Team that can be used to convert UTM coordinates to lat, long. The tool is located at:  
<http://science.nature.nps.gov/NRGIS/applications/dbaseapps/coordtransform.aspx>.

### 6.2.1 Legacy NPSpecies Working Data Structure

#### MS Access

The only data structure supported at this time is the legacy NPSpecies MS Access desktop table structure. This data file comes in MS Access 97 format and may be converted up to a newer version (up to Access 2007) for making minor edits to the data prior to uploading. The legacy NPSpecies MS Access desktop user interface is not needed for uploading data, however it may be used to make edits to the data prior to uploading the file.

The legacy NPSpecies desktop working data file structure can be found here:

<http://science.nature.nps.gov/im/apps/npspp/workingdata.cfm>

From the IRMA Voucher application, upload an MS Access 2007 file or lower (.mbd or .accdb) data file with new vouchers.

### **Excel**

Currently unsupported, must insert the data back into the MS Access NPSpecies desktop working data file prior to uploading file.

Future version – If the file is in Excel the first row MUST have column headers and the column headers must map to fields in NPSpecies desktop working data file tblVouchers or tblObservations. Only one worksheet may be populated.

### **6.2.2 New Evidence Template Structure**

Currently unsupported, available at the end of September 2011

The template can be downloaded from here:

<http://www1.nrintra.nps.gov/im/inventory/npspecies/docs/EvidenceTemplate.zip>

### **6.2.3 ICMS (ACNS+)**

Currently unsupported, however development of this functionality is scheduled for Spring 2012.

### **6.2.4 NRDT**

Currently unsupported, however development of this functionality is scheduled for Spring 2012.

## **6.3 What if the file contains data for more than one park?**

You have two options 1) select a park unit, upload the file with data for more than one park, then during the upload and import processes only data for the selected park will be used. All other data for other parks will be ignored. For the next park, upload the same data file again, and then import its data. Repeat this for each park in the data file you want to import. Or 2) split the data file into multiple legacy NPSpecies working data files using the steps below prior to uploading the data file. When using this procedure you will be uploading a file for a single park only. Repeat this process for all the parks you want to import data.

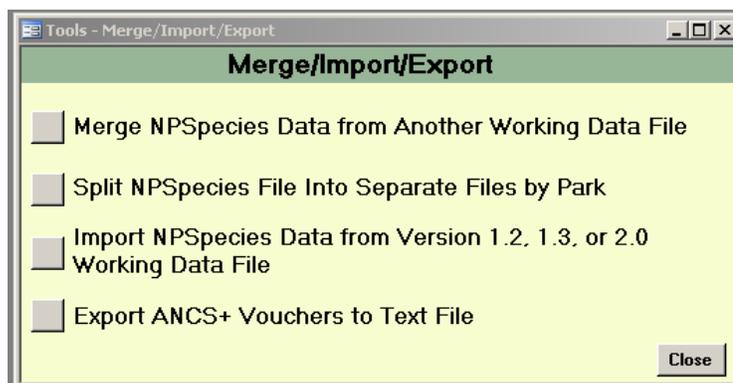
### **Splitting your legacy NPSpecies working data file by park**

Prior to uploading the file, use the Split NPSpecies File into Separate Files by Park tool in the desktop user interface. Tip: You'll need a copy of a [blank working data](#) file when you get to step 5 below.

1. To do this open the user interface for the legacy NPSpecies desktop file.
2. Click the Tools button under Utilities on the main menu.



3. Select the Merge/Import/Export option.
4. Click the button to the left of "Split NPSpecies File Into Separate Files By Park" option.



5. Follow the instructions provided by that wizard.

## 6.4 What if the file contains data for more than one taxonomic category?

If your original legacy NPSpecies MS Access working data file contains data for more than one taxonomic category that is ok, you do not need to split the data file up. Simply upload the once file and import all the data as it is.

## 6.5 How do I check the data file for errors?

### ATTENTION VERY IMPORTANT!

Prior to uploading a data file please use the helper SOP and database to check your data file for errors. The SOP instructs how to set up links to your data file from the helper database and provides a standard set of queries to assist in finding errors. Any errors should be corrected in your data file prior to uploading the data file.

The preprocessing tool can be found here:

<https://somedwhere.nps.gov>

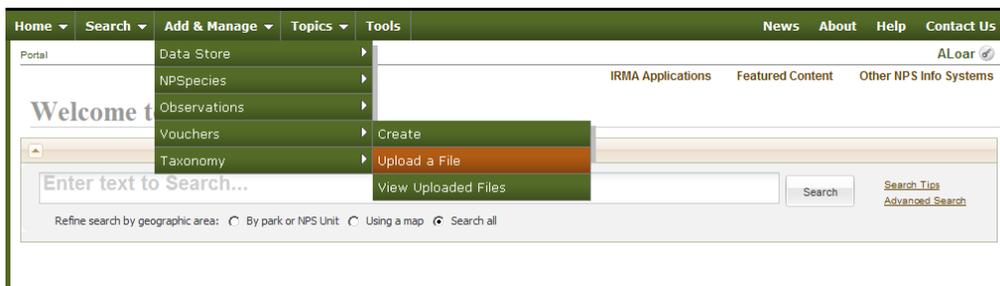
The preprocessing instructions can be found here:

<http://somedwhereelse.nps.gov>

## 6.6 How do I upload a data file for import?

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

No matter where on the IRMA portal you find yourself, you can upload a data file from the green bar at the top of the page by selecting Add & Manage, click on Vouchers, and then click the Upload a File option.



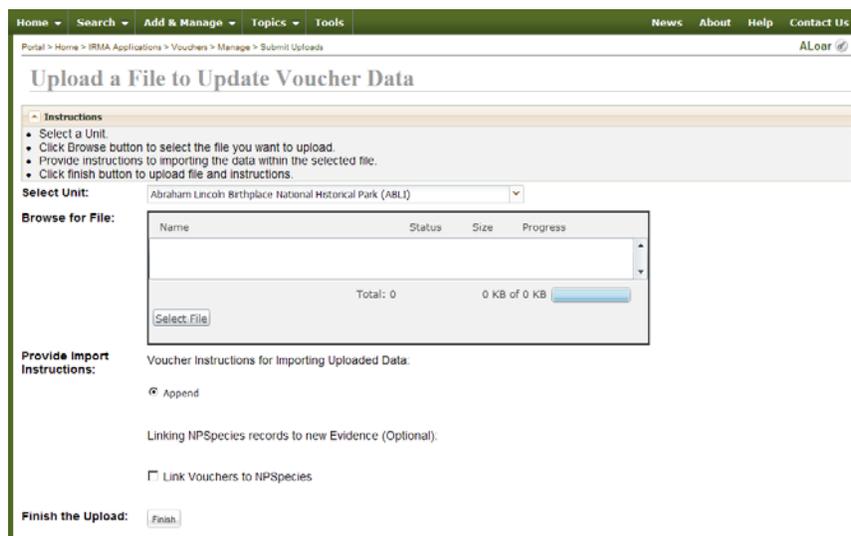
After selecting Upload a File you will come to a page where you can select the file from your computer or network location. Follow these four simple steps.

1. Select a Unit.
2. Click Select Files button to select the file you want to upload.
3. Provide instructions to importing the data within the selected file.
4. Click Finish button to upload file and instructions.

The Finish button will save your uploaded file and instructions, then will run an automated check to ensure your uploaded file meets certain structural requirements. This step is called pre-validation.

1. If this pre-validation fails due to inconsistencies between your importing instructions and the data you provided, you should change your importing instructions (i.e. request to Append Vouchers, when there are none in the uploaded file).
2. If this pre-validation fails due to problems with your uploaded file not meeting the structural requirements (i.e. file is not an MS Access NPSpecies working data file), then you will be required to you will be required to correct the data issues in the original file, and then re-upload the data file.

Once the tasks are completed successfully you'll be taken to the Manage Uploaded Files page where you may import the data into the Voucher database.



## 6.7 What are the importing options?

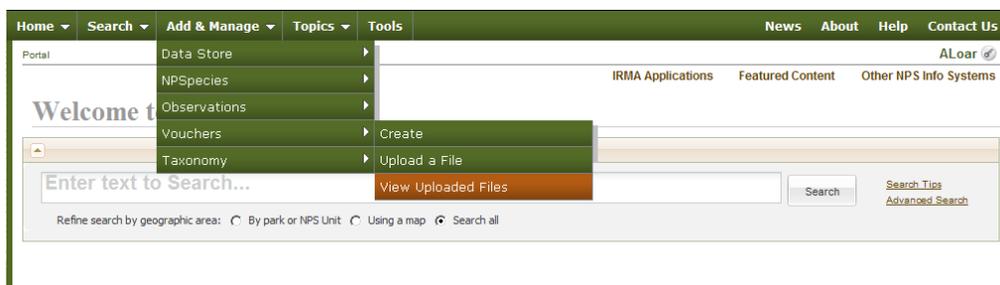
Currently, the only importing option available is to add new vouchers. Only include vouchers that have not been entered. The system has no way to identify one voucher from another and will treat all incoming vouchers as new records. A future version will enable updating the content of existing vouchers online.

### Link Vouchers to NPSpecies

If this is checked all vouchers imported will also be linked to NPSpecies Park-Species Profiles. This step will be skipped if this box is left unchecked. Leave this box unchecked ONLY if you do NOT want to associate these vouchers as evidence for your park-species profiles (this is rare). If a voucher is for a species that is not yet on the park-species list in NPSpecies this step will add it.

## 6.8 How do I view data files that have been uploaded?

No matter where on the IRMA portal you find yourself, you can view upload data files. From the green bar at the top of the page select Add & Manage, click on Vouchers, and then click the View Uploaded Files option.



From the View Uploaded files page previously uploaded files may be managed at any stage of their lifecycle from uploaded through imported.

### View Import Instructions

Clicking this link provides a popup with a summary of the import instructions.

### Validate File

This link executes a thorough data validation of the data and tables within the uploaded file and determines whether the data will cleanly import into the Voucher database.

- If the data file passes validation the import option will be enabled on the next screen.
- If the uploaded file does not pass this validation on the next screen, then the original data file must be corrected on your hard drive and re-uploaded. A detailed list of issues by table/column/row will be generated by the system that is to be used to make the necessary corrections for the data to pass validation. It is recommended that you delete the version of the uploaded file that fails this validation as the system cannot use it. See the section called Delete File below for details.

### Import File

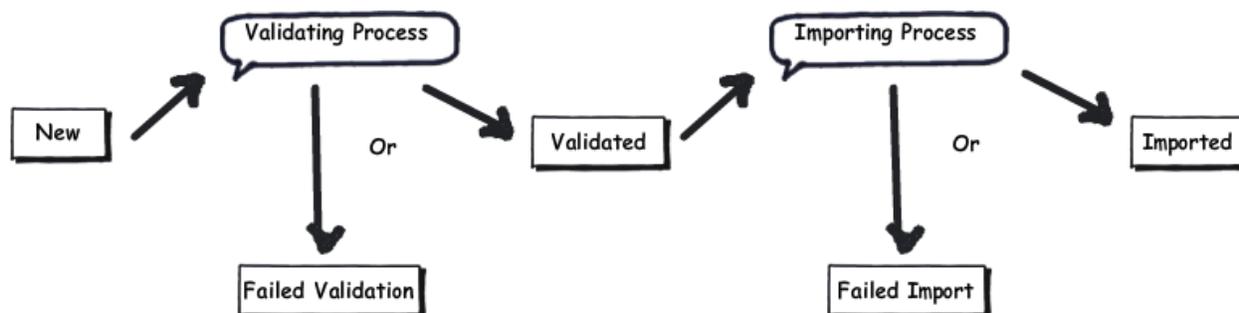
Clicking this link will execute the data validation (even if it has already been run) and then execute the import of data within the uploaded file into the Voucher database. Once the import has been completed a summary will display of what was imported.

### Delete File

This link deletes the uploaded file regardless if its data has been imported or not. A confirmation message will display.

### Status

This is the lifecycle status of the uploaded file. This diagram displays all the status values and processing that initiates the status changes.



- When a file is newly uploaded its status is “New”.
- When a file is running through its validation process it will either fail this validation or complete successfully. If the file fails this validation, then the file should be deleted as the system cannot use it for importing data. The original file on your hard drive or network share must be corrected, then re-uploaded and sent through the validation again. Failing validation usually means there is a problem with the data in the uploaded file that will prevent it from being imported.
- If this validation passes successfully the uploaded file is in a “Validated” status and is a candidate for running through the import process.
- When the file is being run through the import process it will either complete successfully or it will not. If the uploaded file does not import, the uploaded file will be in a “Failed Import” state. Failing the import process usually means that something out of your control happened during the import process such as losing your network connection. You may try to run the import process again and it should import the data just fine.
- Once the file is in an “Imported” status, you have a choice to keep the uploaded file here for tracking purposes of imported files or you can choose to delete the file as the system no longer needs it.

## 6.9 How do I import the data?

After clicking on the Import link on the View Uploaded Files page, you'll be taken to the Validating Voucher Data for Import page. A validation of the data will occur for two tables (tblVouchers and if necessary tblNegTaxUnits); each column/and row in the data file is evaluated.

If the validation passes and you have permission to import, then the Import button is enabled. Click the "Import" button to import the data within the uploaded file for the park selected. This button will be grayed out if the data validation does not pass. If there are data validation errors, then the original data file needs to be corrected on your hard drive, re-upload the file, then re-validate/import the data. If even one application does not pass the validation, then NO data are imported. The entire data file must pass the data validation for any data to be imported (it's a related package of information).

### Next Steps

Once you successfully import your vouchers and optionally link the data to park-species profiles in NPSpecies it is recommended to spot check those records. If there are any additional collectors or repositories for the new vouchers, please add those at this time. Your records were imported with a “legacy” lifecycle state because the data coming in was in an older structure.

## 7 Visibility of Voucher Data

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### 7.1 Authenticated vs. Unauthenticated Users

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

### 7.2 Vouchers

Access to voucher 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 voucher application. In the past a login had to be given to a user in order for them to have access to NPSpecies and voucher data, now users with NPS active directory accounts will automatically have access to the IRMA portal and a subset of voucher 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 – Voucher 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 voucher records that have a sensitivity value of Non-sensitive or Authorized Access Only. Added permission will give authenticated users greater access to voucher 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 able to upload files for a batch import of voucher records and will be able to add or remove user permission to the voucher application, in the future.

## 8 Appendix A – Glossary

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### 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

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### 9.1 Voucher Fields and Descriptions

Profile Tab	Label	Definition
<b>Unique Voucher Identifiers</b>	<b>Voucher Code</b>	Unique code identifying each voucher record.
	<b>Unit</b>	The park or park unit that the voucher is linked to. The voucher does not need to have been collected within the park boundary but should have been collected within close proximity.
	<b>Standard Scientific Name</b>	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> .
	<b>Sensitivity</b>	Security level based on the sensitivity of this particular voucher 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
	<b>Lifecycle Status</b>	The life cycle status describes the state of the voucher 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. All information from legacy fields are correctly reflected in the new fields. This does not mean that the record cannot be edited if data need to 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.
<b>Event Tab</b>	<b>Documented</b>	Scientific name that was documented when the species was collected (the name on the original label for the

	<b>Scientific Name</b>	voucher).
	<b>Legacy Collector(s)</b>	Name(s) of collector(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.
	<b>Legacy CollectorID</b>	The original ID assigned to the voucher by the collector at the time of collection. These data are being migrated to a new database schema, so the "legacy" values were preserved to confirm correct migration.
	<b>Collector Name</b>	Name of collector.
	<b>Collector ID</b>	The original ID assigned to the voucher by the collector at the time of collection.
	<b>Collector Title</b>	The collectors title at time of the voucher collection (i.e. Biologist)
	<b>Collector Affiliation</b>	The affiliation of the collector at the time of the voucher collection. (i.e. Yellowstone National Park). Submit additional affiliations needed to IRMA_Feedback@nps.gov
	<b>Date Collected</b>	Date that the collection was made. <ul style="list-style-type: none"> <li>When Month/Year is selected a dropdown list of month options will appear as well as a text box for providing a four digit year (YYYY).</li> <li>When Year, Winter, Spring, Summer, or Fall are selected a text box displays for providing a four digit year (YYYY).</li> <li>If the data was migrated from NPSpecies 1.0 the Date Collected may be the beginning of a date range when the exact date could not be determined.</li> </ul>
	<b>Legacy End Date</b>	The end date of a date-range if the exact date that the voucher was collected is 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.
	<b>Time</b>	Time of collection (12-hour clock). (i.e. 01:30 PM)
	<b>General Habitat</b>	Keyword selected to describe the general habitat the voucher was collected in.
	<b>Specific Habitat</b>	Keyword selected to more specifically describe the habitat the voucher was collected in.
	<b>Habitat</b>	Description of habitat where collection was made.
	<b>Count</b>	The number of individuals that were collected.
	<b>Age</b>	Age is individual collected, if determined.
	<b>Sex</b>	Sex of individual, if determined and if animal.

<b>Repository Tab</b>	<b>Legacy Repository</b>	One or list of several museums, herbariums, collections of other location where the voucher specimen is stored.
	<b>Legacy SpecimenID</b>	Identification number of voucher specimen (ID number provided by the repository, as contrasted with the collector number provided by the collector). These data are being migrated to a new database schema, so the "legacy" values were preserved to confirm correct migration.
	<b>Repository</b>	Name of the museum, herbarium, collection of other location where the voucher specimen is stored. There can be several repository records entered for one voucher, meaning that there are the potential of more than on location where the collected specimen is stored. Submit additional repositories needed to IRMA_Feedback@nps.gov.
	<b>Catalog Number</b>	A number or code assigned to a specimen, by the repository staff that uniquely identifies the specimen at that repository.
	<b>Accession Number</b>	A number assigned to the accession and links the specimen to the accession records.
	<b>Storage Location</b>	A description of where the specimen is stored at the repository (i.e. specific collection, building, bin etc.).
	<b>Repository Details</b>	Any notes associated with the repository record.
	<b>Voucher Type</b>	The type of voucher.
	Specimen	Whole or partial specimen (e.g. skin, bone, egg, blood, etc.) Specify in details.
	Image	Hardcopy or digital image.
	Audio Recording	Tape or digital audio recording
	DNA	DNA sample collected.
	<b>Voucher Type Details</b>	Notes associated with the type of voucher collected.
	<b>Collection Method</b>	Description of how the voucher was collected.
	<b>Determiner Name</b>	The name of the individual that identified of the voucher, there may be more than one.
	<b>Determiner Title</b>	The title of the individual that identified the voucher.
	<b>Determiner Affiliation</b>	The affiliation of the individual that identified the voucher. Submit additional affiliations needed to irma@nps.gov.
	<b>Determination Date</b>	That date that the identification was done.
	<b>Verifier Name</b>	The name of the individual that verified the identification of the voucher, there may be more than one.
	<b>Verifier Title</b>	The title of the individual that verified the identification of voucher.

	<b>Verifier Affiliation</b>	The affiliation of the individual that verified the identification of the voucher. Submit additional affiliations needed to irma@nps.gov
	<b>Verification Date</b>	That date that the verification of the identification was done.
<b>Location Tab</b>	<b>Description</b>	Concise description of collection site within the park, or location given on specimen label for historical specimens.
	<b>Local Location Code</b>	An optional code identifying a permanent locally recognized location where the collection was made. Can be used in lieu of coordinates when numerous records need to be added.
	<b>Elevation</b>	Elevation where collection was made.
	<b>ElevationUnits</b>	Units for elevation (feet or meters).
	<b>InParkBoundary</b>	Yes/No/Unknown whether the voucher was collected inside the park boundary.
	<b>In Park Boundary Details</b>	Any comments or notes associated with the determination of whether the voucher was collected from within or outside the park boundary. When an In Park Boundary is No or Unknown it is encouraged to have a comment explaining why.
	<b>Latitude</b>	New coordinate field. Stores data in decimal degrees (i.e. 44.02). Only two decimal places are necessary.
	<b>Longitude</b>	New coordinate field. Stores data in decimal degrees (i.e. -110.14). Only two decimal places are necessary.
	<b>Coordinate Error</b>	See coordinate error field under legacy coordinates for now. This field migrated properly from NPSpecies 1.0 and should display next to the new latitude and longitude fields, however it is a bug that it is missing and no new coordinate errors may be entered at this time.
<b>(Legacy Coordinates)</b>		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 convert to Latitude, Longitude WGS 84 for the purposes of mapping the coordinates. All new coordinates will be stored in Latitude, Longitude as well.
	<b>Latitude(DD)</b>	Latitude in decimal degrees where the collection was made.
	<b>Longitude(DD)</b>	Longitude in decimal degrees where the collection was made.
	<b>UTM X</b>	UTM X coordinate (easting) where the collection was made.
	<b>UTM Y</b>	UTM Y coordinate (northing) where the collection was made.

	<b>UTM Zone</b>	UTM Zone of X and Y coordinates for the collection.
	<b>UTM Datum</b>	Datum for UTM coordinates (i.e. NAD27 or NAD83).
	<b>Coordinate Error (meters)</b>	Estimated accuracy of the location coordinates in meters.
<b>Record Information</b>	<b>Comments</b>	Any general comments about the voucher and voucher record.
	<b>Data Source</b>	The data source of the voucher record, if known.
	<b>Reference Code</b>	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 voucher was collected.
	<b>Source Database</b>	If the voucher record comes from some other database such as ICMS than the database name can be entered here (i.e. ICMS).
	<b>RecordID</b>	This is the unique ID for the voucher in the database named in the Source Database Field. For ICMS it would be the Catalog #.
	<b>Online Link</b>	If this voucher can be found in a museum on-line search you are welcome to enter the museum search link in this field.
	<b>Project</b>	If the voucher was collected as part of a larger project the project name can be entered here.
	<b>Created By</b>	This information is tracked internally and filled in by the system. The user that creates the voucher record will be entered here.
	<b>Created Date</b>	This information is tracked internally and filled in by the system. The date that the record is created will be saved in this field
	<b>Last Modified By</b>	This information is tracked internally and filled in by the system. The last user to edit the voucher record will be entered in this field.
	<b>Last Modified Date</b>	This information is tracked internally and filled in by the system. The last date that the voucher record has been edited will be entered in this field.

## 10 Frequently Asked Questions (FAQ)

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### 10.1 What is the Voucher Application?

The Voucher Application Stores and manages voucher data that was once part of NPSpecies 1.0. Voucher data stored in the new Voucher 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 IRMA 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 voucher data to a species in a NPSpecies Park-Species List?

This is done through the NPSpecies Application.

- 1) From <https://irma.nps.gov/App/Species/Welcome>, click on "Search" in center of the screen
- 2) 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>
- 3) 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.
- 4) Select the name you are interested in and that park-species profile will load.
- 5) Click on the Hyperlinked text "Edit Profile" that appears under the Park\_Species Profile title. This will allow you to edit the profile.
- 6) Click on the Evidence tab. This is where you can link voucher records to a park-species.

### 10.4 Will the public be able to see voucher data?

No, the voucher 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 voucher data?

The voucher data will be editable on the IRMA Portal at the beginning of May, if you have edit permissions. If you do not have permission to edit voucher 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 IRMA Portal?

May 1<sup>st</sup>, 2011

### 10.7 Where can I find field definitions?

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

### **10.8 What are the Legacy fields that appear in the Voucher Profile?**

During migration of the Voucher data some data migration was more difficult to complete without heads up conversion of the data. For these fields the data that was entered in Oracle was preserved and labeled as Legacy. This is a way of checking that data has not been changed or lost as further conversions occur to the voucher data to fill in the new database schema.

All legacy field information will need to be checked in the new fields to ensure data migrated properly. This check can only be done using human eyes. No more automation can be programmed for this task. If the data did not migrate properly, those data will need to be correctly added/updated in the new fields.

WASO will be contacting each POC to devise a plan to help get these new fields correctly populated from the legacy fields.

### **10.9 Do the Legacy fields need to be filled in for a new record?**

No, and they cannot be edited, the legacy fields will only have values for the records that were migrated from the Oracle database.

### **10.10 Do all the fields need to be filled in?**

No, only fill in the information that you have, the more that can be entered the better but we do not expect all the fields to have a value. Some fields will not be relevant for all data, for example plant data will not have a value for sex.

### **10.11 What do I do if I cannot find the repository I need to enter in the list of repositories?**

Our list of repositories is not exhaustive and we hope to add new ones as we hear of repository names missing from our list however, to avoid multiple entries for one repository only administrators can add new repositories. If you cannot find the repository you need choose the value Unmatched in the repository dropdown and then in repository notes write the name of the repository you need to add. Then notify us at [irma@nps.gov](mailto:irma@nps.gov) that a new repository needs to be added and what the name is.