

# MassWildlife's Heritage Hub

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## Help Documentation

This document provides descriptions and screenshots of the functionality within the Heritage Hub application.

**Prepared by: Massachusetts Division of Fisheries and Wildlife**



MASSWILDLIFE

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### Terms of Use

In making observation reporting forms in this system available for use by the public, the NHESP does not authorize or condone the entry onto private property without the owner's knowledge and permission. The unlawful trespass onto private property may subject a trespasser to the criminal or civil sanctions available under the law. For these reasons, the NHESP strongly recommends that the permission of the landowner be obtained prior to entering private property to collect information for these forms. It is the sole responsibility of each person collecting information for these forms to ensure that their activities comply with the law.

**Please note: This is a living document; it will be updated as new features are released.**

### Internet Browsers

- Ensure you have the latest version of your web browser installed. Older versions may not support all system functionality.
- Internet Explorer is considered deprecated and therefore not a supported browser for this application.

The Heritage Hub is mobile responsive and should work with most mobile devices. The system is not/does not have an app and therefore you must have an internet connection to access the system, save data, and submit reports.

Link to application: <https://eeaonline.eea.state.ma.us/dfg/nhESP/#/home>

### Creating an account

From the Heritage Hub homepage, click on the LOGIN/REGISTER button.



You will be directed to the log in page where you can:

1. Log in with an existing account
2. Create an account
3. Request a password reset
4. Activate your user profile
5. Update profile

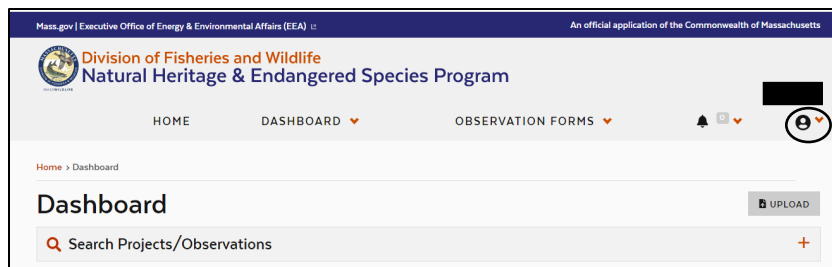
First time users should click on "Create an account". You will need to create a Username and Password and provide an email address. The system also asks for your first and last name and phone number. These are not required to create an account, however, first and last name are required to use the system. Therefore, we encourage you to enter them during account creation.

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**Note:** If you have created an account with Massachusetts's Executive Office of Energy & Environmental Affairs (EEA), your credentials are the same for this application (e.g., MEPA public comments, MDRA Apiary and Pesticide Locator (MAPL), etc.).

### Editing your Profile

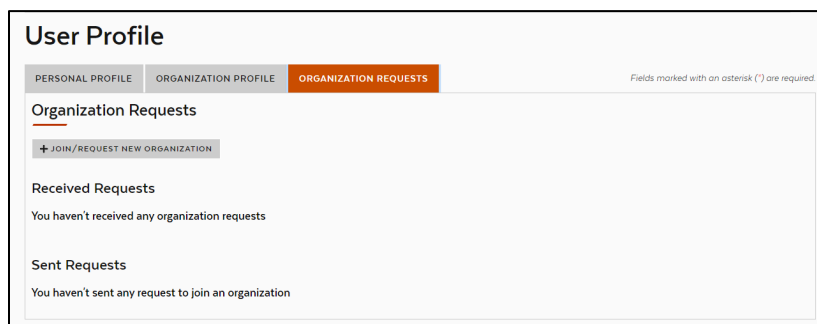
Once you are logged in you can edit your profile by clicking on the down arrow in the upper right corner. The two options presented are "User Profile" or "Logout". Click on User Profile to display and edit your personal (Name, address, phone number).



Please note that your account is linked to your email address. It may be necessary to create different accounts for personal or professional use. Please see Organization Profiles below for information on associating reporting with an organization.

### Organization Profiles

Users can request that an Organization Account be created. This functionality allows organizations and companies to create group accounts for their employees. **All forms created under an organization account belong to the organization and can be viewed and edited by the Organization's Administrator (Org Admin).** A request to create a new organization can be made from the User Profile page. Click on "Organization Requests" and then Join/Request New Organization.



Users can search for an organization and request to join or request to create a new organization. All organization requests will be reviewed by the Heritage Hub Administrator for approval. Once an Organization has been created, the Org Admin can send invitations to members. It is the Org Admin's responsibility to add and remove employees.

Being part of an Organization adds a radio button option to the top of your Dashboard. By default, you will be logged into your private account and you must choose "Organization" to see the Organization dashboard.

This set up allows Users to utilize a private email account to be associated with an Organization and have access to both Dashboards with one account. Alternatively, you may create 2 accounts if you have private observation forms you'd like to submit.

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Once an employee has been removed from an Organization their reports will remain on the Organizations' dashboard but the former employee will no longer have access to these reports or to the Organization dashboard.

### Navigating the Application



In addition to the User Profile information, the top banner of the application contains links to your Dashboard and the Observation Forms. You can use these navigation dropdowns from anywhere in the application. Notifications are also accessed via the banner (the bell icon).

### Observation Forms

The Heritage Hub contains forms for reporting Animal, Plant, and Natural Community Observations as well as a Vernal Pool Certification Form. For more information on reporting, see [www.mass.gov/heritagehub](http://www.mass.gov/heritagehub). Help tips are also built into the forms to help you along the way.

All the required fields have been front loaded to the first 2 tabs of the form. You must fill out the entire first page and save before navigating away from the form or it will be lost.

Three navigation buttons are available to move through the tabs. "Save & Continue" moves you tab by tab through the form. The "Back" and "Save & Upload" buttons become available on the Map tab (2<sup>nd</sup> tab). "Back" allows you to move to previous tabs. The "Save & Upload" button bypasses subsequent tabs and brings you to the Upload tab.




The application brings you to the Upload tab each time to remind and encourage you to upload any photos or supporting documentation you have for your observation. Once on this tab you can "Save & Review" to submit your form.

The last step is to capture your electronic signature when submitting your form. "Name" must match the name on your profile and "Date" must be today's date.

### E-Signature

**Name\*** (Name should be in the order, FirstName LastName)

**Date\***

I hereby certify under the penalties of perjury that the foregoing filing and any accompanying information are true and complete to the best of my knowledge.\*


[← BACK TO OBSERVATION](#) [SUBMIT →](#)


### Dashboard

You have 2 dashboards available to you. The Form/Observation Dashboard contains a list of all your observations form. You can save drafts here or monitor your form as it goes through the review process. The Effort Dashboard contains a list of any “Efforts” you may have created. An Effort is our way of allowing you to group observations together. If you would like to group multiple observation reports together you can tag them to the same effort.

Both dashboards include a search feature to help you search forms or efforts within your reporting history.

#### Dashboard

 UPLOAD



Projects/Observations List

Form ID	Project/Site Name	Type	Target/Species	Town(s)	Status	Actions
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There are several **Actions** associated with each form.



“Edit Observation” – this tool is available when forms are in “Draft” status or sent back to you for more information (“More Info Required”).



“Copy observation” – this is available on all forms and allows you to copy your form to a new one. For more information see [Copy Forms](#).



“Delete observation” – This is only available on draft forms. Once a form is submitted it cannot be deleted.



“View Details” – This allows you to view a submitted form. There is also an option at the bottom of the review page to view a “Copy of Record”, this option allows you to print or save a PDF of the form.



“View Messages” – Messages are linked directly to a form. Clicking the envelope button allows you to send a message to the biologist assigned to review your form. A number will appear next to the envelope indicating how many messages are associated with the form. Click on the icon to view or send.



### Notifications

The number next to the notification bell will populate and turn red with new notifications. System notifications inform you when your form has been reviewed by a biologist, including if more information is needed to help with the evaluation.

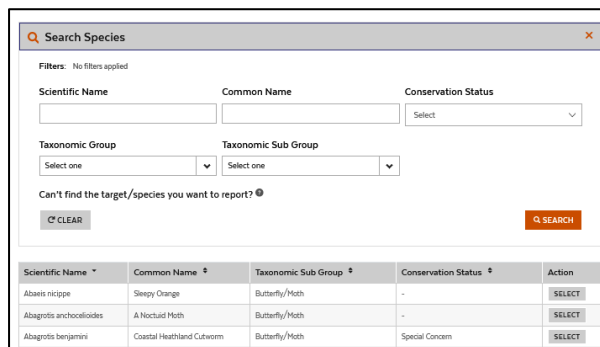
In forms sent back for more information, the requested information is also available within the form, for your convenience.



### Species/Target Reporting

When completing Plant, Animal, or Natural Community forms the first question is to indicate what you are reporting by selecting a species/target.

The Heritage Hub offers a robust list of species/targets from which to choose your selection. You can enter search options to filter the list and find the species/target you want to report.



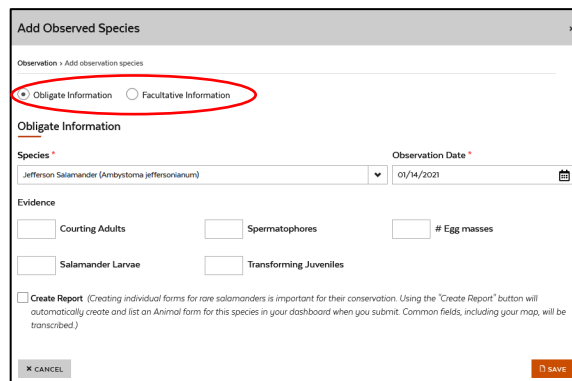
If you cannot find the species/target you wish to report, you can report the group to which it belongs, and our Biologist will update once an ID has been made. Group names can be entered into the Scientific Name field to search and include:

- Plants
- Natural Community
- Ants/Bees/Wasps
- Anuran [frog]
- Beetle
- Bird
- Butterfly/Moth
- Dragonfly/Damselfly
- Fish
- Mammal
- Mussel
- Turtle
- Salamander
- Snail
- Snake
- Crustacean
- Sponge
- Flatworm
- Segmented Worm
- Moss Animal
- Other Insect
- Other Invertebrate
- Animal Assemblage [e.g., bat hibernaculum]

When completing Vernal Pool forms, the species options are limited to Obligate and Facultative species, the associated biological evidence observed, and the date of those observations.

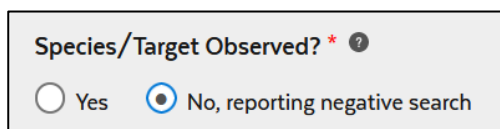
The window shown here can be completed for each unique species/date combination to be reported.

For MESA-listed salamanders, there is also an option to “Create Report”. Please see [Creating Animal Forms from a Vernal Pool Form](#) for more info.



## Reporting Negative Data

The observation forms can also be used to report negative data. After selecting your target, you can choose “No, reporting negative search” when answering Species/Target Observed?. This will truncate the form to only display question relevant to a negative search. You will still be prompted to map the site of your search and can provide survey-level detail, but many questions will be hidden.



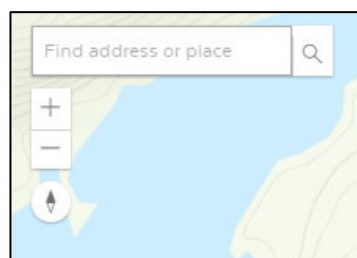
Species/Target Observed? \* ?

Yes  No, reporting negative search

## Mapping

### Find a location

The “Find address or place” field can be used to use your current location, search an address, or enter latitude and longitude to zoom to a location. When the map zooms to a provided location a point will display on the map. **This point is just a graphic and the mapping tools must still be used to draw your observation location.**



The +/- buttons can be used to zoom the map in and out. You can also click and hold on the map to drag or pan.



This tool allows you to view the map full screen. It is found in the bottom right-hand corner of the map. Click it again to exit full screen.

### Basemaps and Reference Layers

The bottom left of the map contains the following tools:



This tool allows you to select a different basemap.

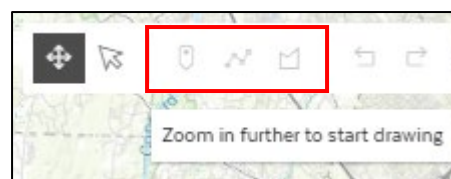


This tool allows you to turn on available reference layers (such as Town boundaries and Potential Vernal Pools).

### Draw a point, line or polygon feature

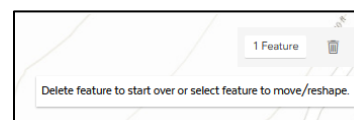
To enable editing tools, you must be zoomed in to at least the 1:600 ft scale. You can then select one of the tools provided to draw a point, line, or polygon, undo or redo edits. Double-click on the map to stop editing a feature.

Note: Only one feature can be drawn



### Deleting, moving, or reshaping a feature

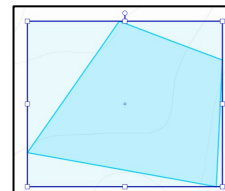
To **delete** a feature, select the feature then click the trash can icon. Only one feature can be mapped per report so you must delete an existing feature before drawing a new shape. See [Copy Forms](#) below for more information about reporting multiple locations.



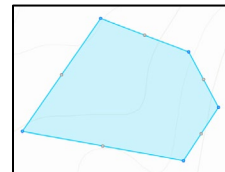


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To **move** a feature, click on the feature to select (the blue box indicates a shape has been selected) then drag it across the map to a new location.



To **reshape** a feature, double-click the feature (line or polygon) then click and drag any vertices as desired.

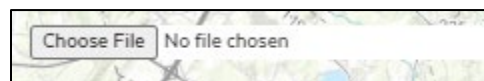


### Uploading a shapefile

The map allows you to upload a shapefile and use the shape as your location. The shapefile must contain **only the one feature (point, polyline or polygon)** you intend to use in the map.

First you must zip up all the pieces of your shapefile into a zip file. [See How to Zip a file](#). Your zipped file must include the following pieces: .dbf, .prj, .shp, .shx.

Once you have created your observation there is an option to choose or browse to a file to upload. Click on the button in the map and browse to your zipped folder.



The map will zoom to and display the shape from your file.

Confirm the shape is correct and in the right location and click the "Save & Continue" or "Save & Upload" button.

### Copy Forms



The copy observation icon can be found in the Actions column of your dashboard. Any form, in any state, may be copied to create a new form. After clicking the icon to copy a form, you will be directed to a new page which allows you to choose the type of form you would like to create and which fields you would like to copy.

Choose the type of copy

Copy as Plant     Copy as Animal     Copy as Natural Community     Copy as Vernal Pool

When copying from one form type to another (i.e. plant form copied to an animal form), only fields that are on both forms will be available to copy. Simply check fields that you want to copy to the new form and click "Copy Observation" at the bottom of the page.

Species Details *		
Question	Answer	<input type="checkbox"/>
What are you reporting?		
Species	Scientific Name: Abagrotis benjamini Common Name: Coastal Heathland Cutworm Conservation Status: Special Concern	<input type="checkbox"/>
Target Detected? *	Yes	<input checked="" type="checkbox"/>
Is this report associated with an effort?	No, I'm reporting a single observation	<input checked="" type="checkbox"/>
Effort Details	-	<input type="checkbox"/>

The new form will open, and any additional information can be entered. All fields and the map may be copied; however, any uploads will need to be attached manually and the form will need an e-signature.

### Creating Animal forms from a Vernal Pool form

When filling out a vernal pool form there is an option to “Create Report” after selecting one of the MESA-listed salamanders. Creating individual forms for rare salamanders is important for their conservation. Using the "Create Report" button will automatically create and list an Animal form for this species in your dashboard when you submit. Common fields, including your map, will be transcribed. If you check the box to create a report, once your vernal pool form has been submitted, a draft animal form for salamander selected will be created and available for editing on your dashboard.

If you found another species to report while at the vernal pool, copy your vernal pool form, with the copy observation feature, to expediate reporting.

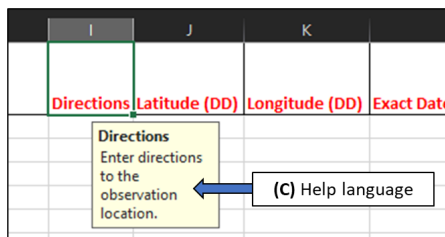
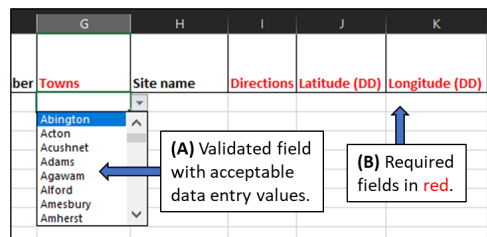
### Bulk Upload

The Heritage Hub application allows you to bulk create Plant, Animal, or Natural Community observation forms. The system will soon support a Vernal Pool bulk upload option as well.

### Upload Templates

To successfully upload your observation reports, you must use one of the preformatted template spreadsheets, available at [www.mass.gov/HeritageHub](http://www.mass.gov/HeritageHub). There is a unique spreadsheet for each form type.

The system allows you to preview your data before upload but *does not* validate your uploads and, therefore, the spreadsheet templates include (A) validated fields to only allow accepted values for data entry. Further, each template has a tab which includes all the acceptable lookup values, where applicable, and all (B) required fields for submittal are displayed in red. Last, the column header includes (C) help language on correct data entry.



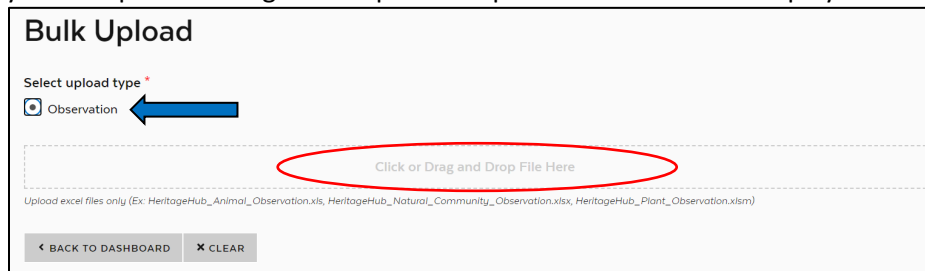
**Note:** Data validations are case sensitive so use of the lookup values provided is strongly recommended.

## How to Upload Reports

You can find the Bulk Upload button from your Observation Dashboard.



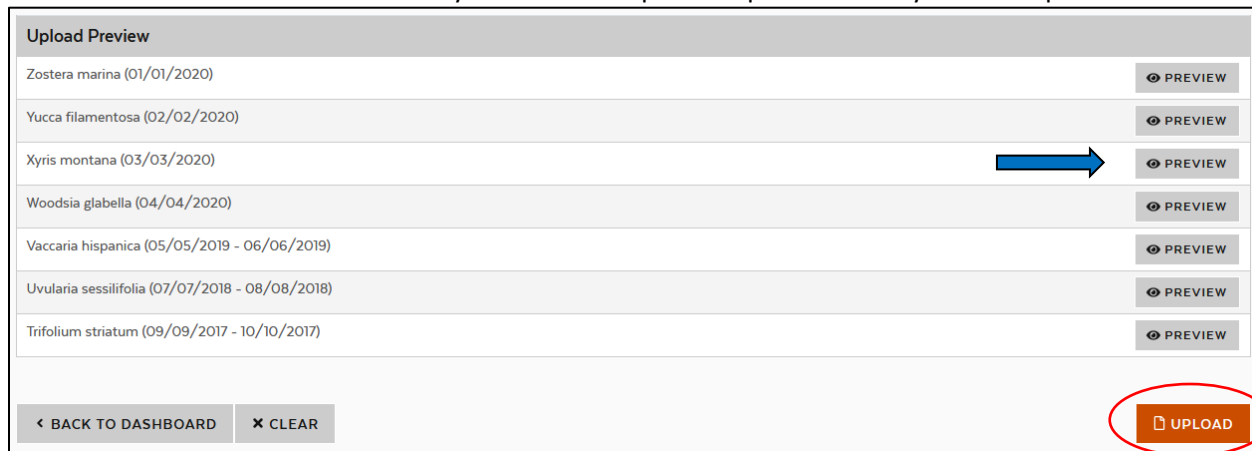
Select Observation as your type of upload then you can either click to navigate to the template saved on your computer or drag and drop the template file into the box displayed.



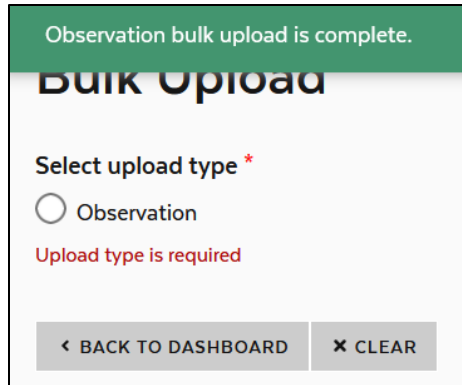
Once you have selected your template you can, click **Preview** to see the list of reports which will be uploaded, click the **trash can** and make new template selection, or click **Clear** to start over.



After the initial Preview selection, you can now click the Preview button next to any of forms and view the data as it will be loaded into the system or click Upload to proceed with your bulk upload.



The system will notify you if your upload was successful or if there were problems encountered. You can then go back to your dashboard to review and submit your draft forms.



Observation bulk upload is complete.

## Bulk Upload

Select upload type \*

Observation

Upload type is required

< BACK TO DASHBOARD    X CLEAR

### Bulk Upload Best Practices, Tips and Tricks

1. When bulk uploading reports be sure to always **start with a fresh template**.
2. **Red fields indicate a required field** to submit your form. You can upload without these values populated but you will not be able to submit your form until they are answered.
3. **Use the look ups provided** on the second tab of each template. Values are case sensitive so and failure to use the specified values may result in an unsuccessful upload.
4. **Consider numbering your reports** (e.g., in the Site Name). In the event some reports fail to upload, this will help you quickly identify which reports successfully went through.
5. If reporting Start and End times for a survey effort **use a 24-hour clock** as there is no way to indicated AM/PM (e.g., 13:00 vs 1:00).