

PROJECT LEADER TIP #1

HOW TO ADD RESEARCHERS

THIS GUIDE CONTAINS TWO USER TIPS:

1. How To Create a new researcher to CADC: this assumes the person has not registered for a myCADC account
2. How To Add a researcher to your project: this can be a registered user with a MyCADC account or a researcher you created.

TO CREATE A RESEARCHER IN CADC

1. Log-in to CADC as Project Leader
2. Click “Preferences” on the right-hand side of the screen and make sure ‘Global Reports.UseNewStyle’ is marked ‘true’ and click close.
3. Under Project Definition, select “Researchers”

Home	Sampling Units	Field Observations	Load Observations in Bulk	Project Definition
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Today is 18-Jan-2011

What you can do in Project Leader?

Sampling Units

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

Field Observations

- [Download](#) - Get Project observation data in different formats.
- [Review Point Counts](#) - For reviewing Point Count observations for a Project and setting level of availability.
- [Review Area Searches / Area Surveys](#) - For reviewing Area Search / Area Survey observations and setting level of availability.
- [Review Rail Point Counts](#) - For reviewing Rail Point Count observations and setting level of availability

Project Definition

- [Researchers](#) - For creating and updating Researchers.
- [Researcher Access](#) - For setting which Researchers have access to a Project, whether they are active or inactive, and whether they are a Project Leader or not.
- [Protocols Used](#) - For setting which Protocols can be used when adding new observation data to a Project.

4. First, search the list and make sure the person you want to add is not already in the CADC database. If they are, please skip to “**ADD RESEARCHER TO PROJECT**” instructions below
5. If the person is not already in the database, select orange “add one” button

Researchers

 **add one**

Print Copy table to: CSV HTML DOC PDF

Last Name	First Name	Email	Projects	Status
	Donna			Active
Abbaspour	Parvaneh	pabbaspour@prbo.org	PFLY02	Active
Abbott	William	billya1620@gmail.com		Active
Ackerly	David	dackerly@berkeley.edu		Active
Ackerman	Ken	PreDEJU	PFLY02	Active
Ackerman	Josh	jackerman@usgs.gov	AVIANDEMOG	Active

6. Fill-out the form. The only required fields are **Researcher, Status, Email Address**.
 - a. Select “Active – the researcher may use the system” under “*Status”.
 - b. Identify if this person can be contacted.
 - c. Provide a unique email address. If you do not have an email address you must create a fake one. Use the project code at the to crete a dummay email address. For example, for San Francscio Bay, SFSS use sfss1@sfss.com. For each observer from the same project who you don’t have an address for, create numbered emails: sfss2@... sfss3@... etc. The email address can be modified later if the person wants to create a mYCADC account.
 - d. Press orange “save” button at bottom of screen when complete. This person can now be added to your project.

Add a New Researcher

*Researcher (Last Name, First Name)

*Status

Contact Okay to contact Do not contact this person

Researcher is known unknown

Primary Country Code

Primary Phone Number Ext

Backup Country Code

Backup Phone Number Ext

*Email Address

Mailing Address

City

State

TO ADD A RESEARCHER TO YOUR PROJECT

1. Log-in as Project Leader
2. Click “Preferences” on the right-hand side of the screen and make sure ‘Global Reports.UseNewStyle’ is marked ‘true’ and click close.
3. Select “Researcher Access” under Project Definition on Home page

Home | Sampling Units | Field Observations | Load Observations in Bulk | Project Definition

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What you can do in Project Leader?

Sampling Units

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Field Observations

- **Download** - Get Project observation data in different formats.
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- **Review Rail Point Counts** - For reviewing Rail Point Count observations and setting level of availability

Project Definition

- **Researchers** - For creating and updating Researchers.
- **Researcher Access** - For setting which Researchers have access to a Project, whether they are active or inactive, and whether they are a Project Leader or not.
- **Protocols Used** - For setting which Protocols can be used when adding new observation data to a Project.

4. On the next page, select the project you want to add the researcher to and click “enter”

Home | Sampling Units | Field Observations | Load Observations in Bulk | Project Definition

Researcher Project Access - Select Project

*Select your project

Select a project...

- BHSS - Bodega Harbor Shorebird Surveys
- BLWB - Bolinas Lagoon Waterbird Censuses
- CVSS - Central Valley Shorebird Survey
- DUMST - Fallow Field Shorebird Surveys dummy project
- ESSS - Elkhorn Slough Shorebird Surveys
- FFSS - Fallow Field Shorebird Surveys
- KRSS - Kern National Wildlife Refuge
- MBSS - Morro Bay Shorebird Surveys
- PFLY01 - Pacific Flyway Project (Shorebirds)

enter

5. Press the “add one” button

The screenshot shows the 'Project Access' page for the 'CRPWS - Cosumnes River Preserve Waterbird Survey'. At the top, there are navigation tabs: Home, Sampling Units, Field Observations, Load Observations in Bulk, and Project Definition. Below the tabs, there are two buttons: 'open new project' and 'add one'. The 'add one' button is highlighted with a red rectangular box. Below the buttons is a table with the following data:

Project Leader?	Get Reg Requests?	Researcher	Email	Status
Yes	Yes	Gilbert, Michelle	mgilbert@prbo.org	Active
		Michale, Sherie	smichale@prbo.org	Active
Yes	Yes	Moody, Doug	dmoody@prbo.org	Active
Yes	Yes	Reiter, Matthew	mreiter@prbo.org	Active
Yes	Yes	Strum, Khara	kstrum@prbo.org	Active

On the right side of the page, there is a user profile for 'kstrum@prbo.org' with a 'log out' button, and links for 'Give Us Your Feedback', 'Preferences', and 'How Do I...'. A help link is also visible: '... understand the difference between Researchers and Users??'.

6. Select the Researchers you want to add (it is alphabetical by last name) to the project.
 - a. Under *Status select “active”.
 - b. For “Are they a project leader on this project?” select NO.
 - c. Press “save” when complete. This researcher should now show up in the drop-down menu during data entry as a primary observer.

The screenshot shows the 'Give a Researcher Project Access' form. At the top, there are navigation tabs: Home, Sampling Units, Field Observations, Load Observations in Bulk, and Project Definition. The form title is 'Give a Researcher Project Access'. Below the title, there is a dropdown for '*Select your project' set to 'BHSS - Bodega Harbor Shorebird Surveys'. The '*Researcher' field has a dropdown menu open, showing a list of names: Abbaspour, Parvaneh; Acosta, Sara; Ames, Elizabeth; Anderson, Michelle; Anderson, Su; Andrews, Betty; Arata, Lishka; Arcidiacono, Alicia; and Arsenault, David. The '*Status' dropdown is set to 'Active Researcher'. The '*Are they a Project Leader on this Project?' dropdown is set to 'Inactive Researcher'. The '*If Project Leader, send project registration requests?' field has radio buttons for 'yes' (selected) and 'no'. At the bottom, there is a 'save' button.