



Submitting Species for Upload to FWSpecies

Overview

This document describes the process of submitting species for upload to FWSpecies. This process assumes the following:

- The taxon (aka species) already exists in the Taxonomy database and therefore in FWSpecies.
- The taxon being added to a refuge is not already present in FWSpecies for that refuge.
- The data being submitted contains a large list of species and/or is an initial load for a refuge not already in FWSpecies.

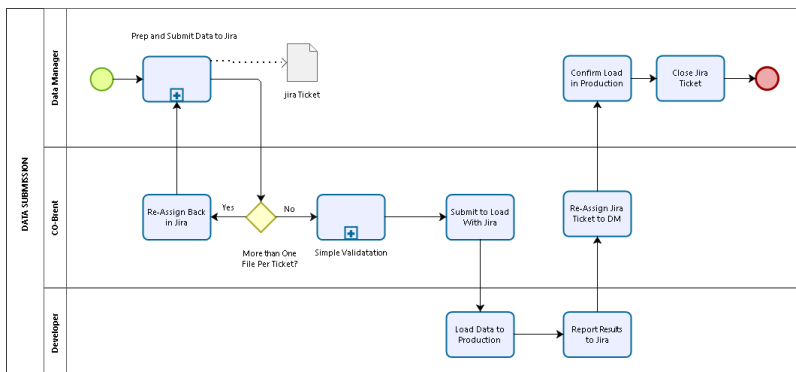
Please note that data submissions will only be supported for larger species lists and/or to accommodate an initial load of species for a refuge not already in FWSpecies. All minor additions to and edits of existing species lists should be made directly within the FWSpecies database and are at the discretion of whoever is assigned in FWSpecies as the refuge’s Editor and/or Point of Contact (POC).

For more information on roles in FWSpecies, as well as information on adding and editing refuge species records, please refer to the [FWSpecies User Guide](#).

Submission Workflow

The entire workflow will be tracked using the JIRA system (<https://ecos.fws.gov/fwsJIRA/secure/Dashboard.jspa>).

JIRA is an online tool used by USFWS to track and manage projects, data submissions and related communications pertaining to FWSpecies.



Obtain an account in JIRA

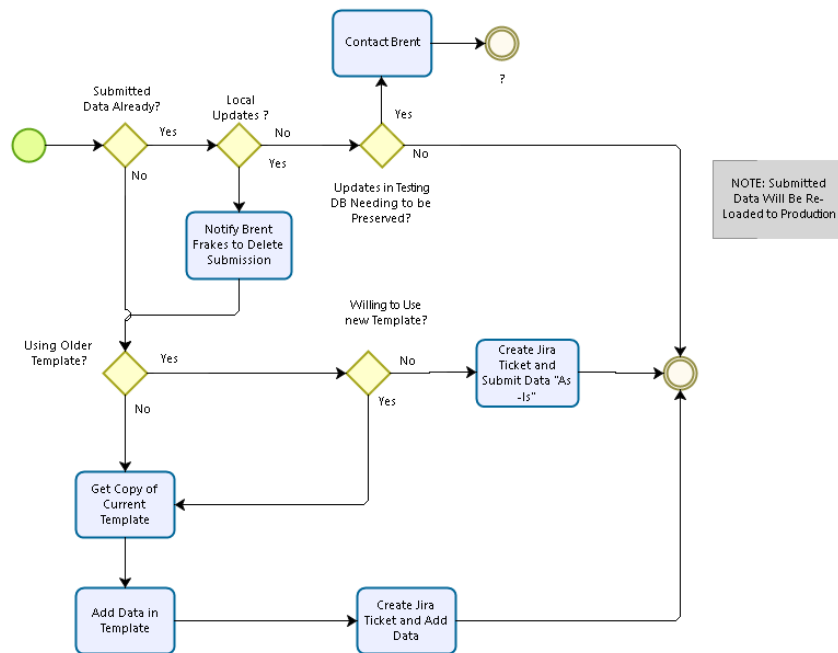
Before any user can submit data to JIRA they must have an account. It is expected that data submissions to JIRA will be primarily submitted by regional Data Managers and/or those individuals assigned as

Editors and POCs for a refuge in FWSpecies, although staff dedicated to managing a station's data for FWSpecies may also obtain an account.

To obtain an account in JIRA, please contact Jaclyn_Johnson@fws.gov with your request.

Prep and Submit Data to JIRA

Once you have an account in JIRA, the next step will be to prepare your data in the preferred template and submit it by creating a ticket and uploading the data in JIRA. We encourage data submissions to be formatted according to the current FWSpecies template. If you have questions or concerns regarding getting your data into the template, please contact the Data Manager Jaclyn_Johnson@fws.gov for guidance.

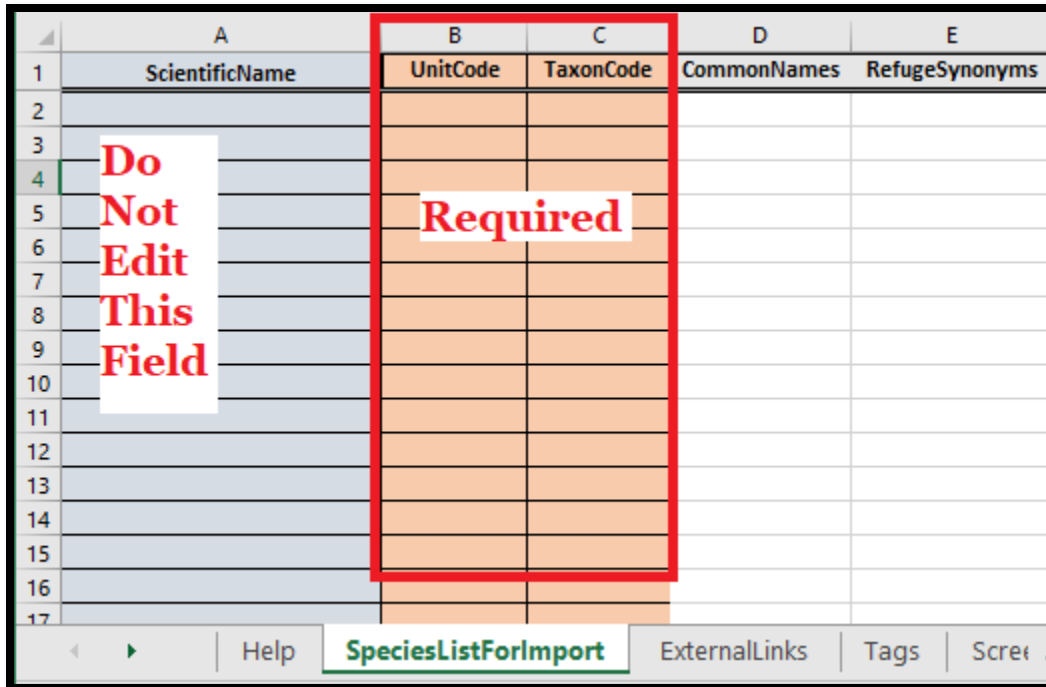


Get a copy of the Template

The current template can be found [here](#).

Add Data in the Template

First, please note the column definitions on the Help tab. These describe the columns found on the next two tabs titled "SpeciesListForImport" and "ExternalLinks", the tabs you need to complete (or mimic).



Of the 21 columns in the tab, only three are required –**UnitCode**, **TaxonCode**, and **Occurrence** (not pictured above). *Do not* fill in the **ScientificName** column as this will auto-populate based on the given values in the **TaxonCode** column. There are requirements in place regarding the data that is expected within the **TaxonCode** column (see below). All other columns are optional. In most cases, blank (aka NULL) values in the template will result in blank (aka NULL) values in the database, with the following exceptions:

Template Field	Template Value	Database Value
Record Status	Blank	Draft
Refuge Accepted	Blank	Yes
Sensitive	Blank	No

If you are unsure of the tag definitions (e.g., abundance), please refer to Chapter 2 of the [FWSpecies User Guide](#).

Notes:

- When providing taxon codes in the column called **TaxonCode**, only a single valid taxon code from the Taxonomy database will be accepted. TSN codes from ITIS are not the same as the taxon code and will not be accepted.
- You may include data for more than one **UnitCode** in a single template but all units must be within the same region.

When submitting evidence links, there are two options depending on the level of detail you wish to provide. If you only have one external link for each species record, then Option #1 is to enter the URL in the **ExternalLinks** column of the “SpeciesListForImport” tab.

	F	G
yms	ExternalLinks	Occurrence
	https://ecos.fws.gov/ServCat/Reference/Profile/83270	

If you want to add more information than just the URL or if you have multiple links per species record, you have a second option. Add the evidence information to the tab in the spreadsheet titled “ExternalLinks”. Note that you will need to re-type the unit code and taxon codes for each respective link.

	A	B	C	D
1	UnitCode	TaxonCode	ExternalLinks	dateURLVerified
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				

ExternalLinks

Date, evidence type, and comments are all entirely optional:

- **Date URL Verified** – the date the link was verified to be valid - this is not the date the species was confirmed to be present in the refuge. The assumption is that the source of the link will indicate the actual date of observation.
- **Evidence Type** – The type of evidence referred to in the link
- **Comments** - Additional notes about the evidence.

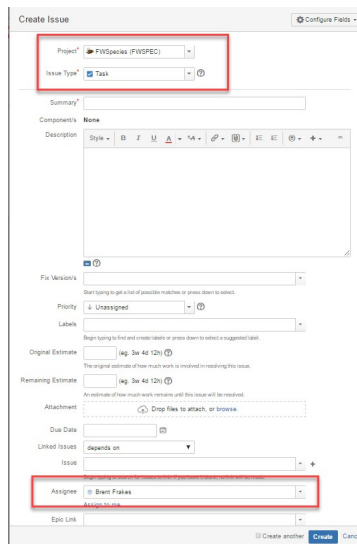
Be sure you do not have the same information on both the “ExternalLinks” and the “SpeciesListForImport” tabs for the same refuge species. All unit codes and taxa listed on the “ExternalLinks” tab must be present on the “SpeciesListForImport” tab in order to be accepted.

Note that only valid, complete URLs will be accepted as external links. URLs must include http:// or https:// in order to be recognized in the application as a valid link.

Create JIRA Ticket and Add Data

When assigning a ticket, be sure to specify the following:

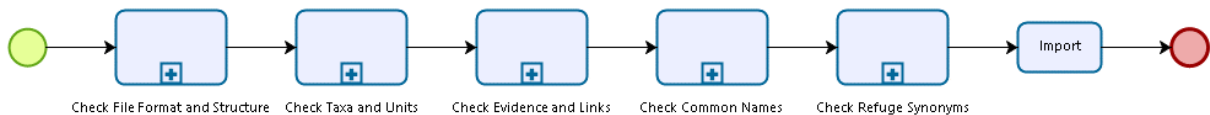
- Project = FWSpecies
- Issue Type = Task
- Assignee = Jaclyn Johnson



Attach your file to the ticket.

Import Logic

The following lays out some of the logical checks we will do and indicates whether the upload will be terminated or if we will provide a summary of errors after upload. If errors are observed these will be tracked in JIRA for the data submitter to view and address.



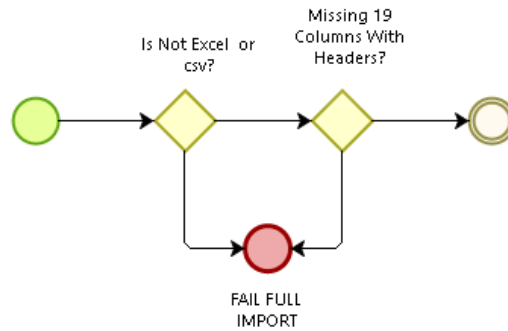
Please be aware of the following definitions when reading the tests:

- **FAIL FULL IMPORT** – None of the data will be imported until the issue is corrected
- **IGNORE RECORD AND WARN** – All of the data will be imported with the exception of the specific record that is invalid. You will be notified following import of which records failed.

- **IGNORE FIELD AND WARN** - All of the data for a specific record will be imported with the exception of the column value that is invalid. You will be notified following import of which values failed.
- **IGNORE VALUE AND WARN** – All of the data for a specific record will be imported with the exception of the delimited value that is invalid. You will be notified following import of which values failed.

Check for File Format and Structure

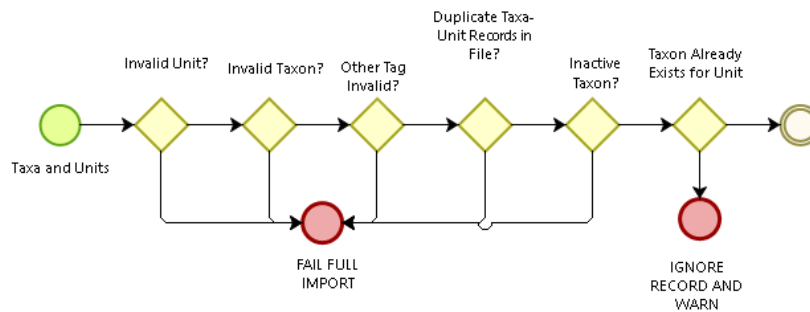
Submitting data using the preferred template will help to eliminate format and structure errors and is the most efficient and quickest way to get data into FWSpecies.



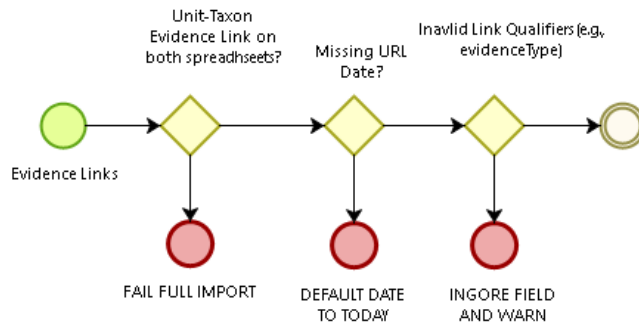
Note that we desire all 21 columns with the appropriate headers. Additional columns will be ignored.

Check Taxa and Units

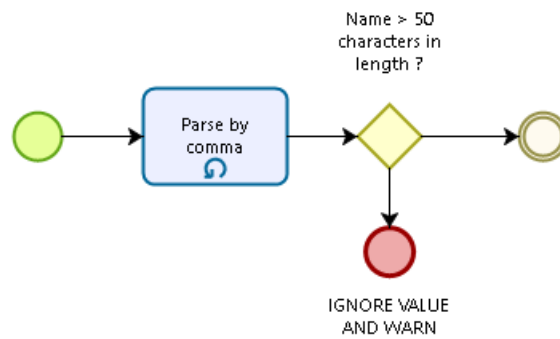
The following graphic describes some of the validation tests.



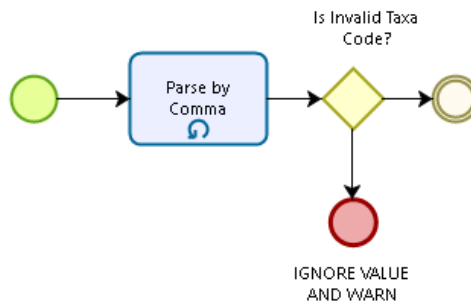
Check Evidence and Links



Check Common Names



Check Refuge Synonyms



Further Help/Questions

If you find any errors/ambiguities/omissions, have any other questions, or need assistance, please contact Jaclyn Johnson (Jaclyn_Johnson@fws.gov, 970-267-2183).