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Monitoring and Evaluation of Nature Improvement Areas: Phase 2

Online Reporting Tool User Documentation and Manual

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Version 2.0

**Collingwood
Environmental
Planning Limited**

**in partnership with
GeoData Institute and
Cascade Consulting**



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Contents

1. Introduction and Context	1
1.1 Overview	1
1.2 Indicators	3
1.3 User classes	5
1.4 Home page	5
1.5 Feedback and Support	6
1.6 Menu	7
2. Registration, Login and User Management	8
2.1 Registration	8
2.2 Login	9
2.3 Manage Requests	9
2.4 User management	10
2.5 User Profile	11
2.6 LLU registration / assignment to projects and indicators	11
3. Creating a Profile	15
4. Enter data, caveats and narrative and review	21
4.1 Creation of the features to be recorded within the Indicators	21
4.2 Caveat Entry	24
4.3 Enter Narrative	26
4.4 LLU data entry and Review	28
5. Reporting and data download	29
5.1 Reporting	29
5.2 Download	30
6. Monitoring and Evaluation Framework	32

List of figures and tables

Figure 1: M&E Framework	1
Figure 2: NIA Online Reporting Tool Home Page	1
Figure 3: Overview of the Online Reporting Tool functionality	2
Figure 4: Home page online reporting tool	5
Figure 5: Feedback form - from Home page	6
Figure 6: The menus for different levels of users	7
Figure 7: Registration panel	8
Figure 8: Registration email request to PLU	8
Figure 9: Existing user login	9
Figure 10: Manage request dialog (SLU)	10
Figure 11: Super Level User, User Management page (SLU)	10
Figure 12: Edit profile dialog	11
Figure 13: Email informing PLU of an LLU application (open in an email client)	12
Figure 14: Manage requests for the PLU to accept or reject LLU requests	12
Figure 15: Local level user home page - for registration to indicators	13
Figure 16: LLU selection of indicators page	13
Figure 17: PLU view of the LLU request to access an indicator - which the PLU Approves or Declines	14
Figure 18: Creation of Profile (choosing indicators for your project)	15
Figure 19: Select theme from the create profile sequence	16
Figure 20: Select optional sub-theme from the create profile sequence	16
Figure 21: Select sub-theme from the create profile sequence	17
Figure 22: Select indicators for each sub-theme from the create profile sequence	17
Figure 23: Adding a local indicator to the sub-theme within the create profile	18
Figure 24: Listing of the selected indicators	18

Figure 25: Breadcrumb trail used to navigate within the Create Profile pages.....	19
Figure 26: Completing the selection of core, optional and local indicators within each theme and sub-theme.	19
Figure 27: Submit the indicator profile.....	20
Figure 28: Confirmation of the intention to submit the indicator profile	20
Figure 29: Selecting species names within features by using dictionaries	21
Figure 30: Entering data / review data navigation	22
Figure 31: Enter data dialog.....	22
Figure 32: Entering the names of features within the indicator	23
Figure: 33 Enter data dialog.....	23
Figure 34: Dialog for entering additional features from the data entry page	24
Figure 35: Entering the Caveats.....	24
Figure 36: Enter caveats page.....	25
Figure 40: Submission of variables	25
Figure 38: Entering the Narrative	26
Figure 39: Narrative data entry screen.....	27
Figure 40: Review data entry access from the NIA project home page	28
Figure 41: Report view and data download.....	29
Figure 42: View report screen - showing access to the caveat and narrative records	30
Figure 43: Download dialog box - allowing you to open or save the spreadsheet created from the query	30
Figure 44: Download of the Excel spreadsheet from the query.....	31
Figure 45: Summary diagram of the indicators themes, subthemes and requirements (core, optional and local)	Error! Bookmark not defined.
Table 1: Description of the core, optional and local indicators from the M&E framework	3
Table 2: NIA indicator selection requirements	4

Abbreviations

BARS	Biodiversity Action Reporting System
BSBI	Botanical Society of Britain and Ireland (
Defra	Department for Environment, Food and Rural Affairs
HTML	HyperText Markup Language
LLU	Local Level User
M&E	Monitoring and evaluation
NHM	Natural History Museum
NIA	Nature Improvement Area
NLU	National Level User
PLU	Project Level User
PROW	Public Rights of Way
SLU	Super User
SSSI	Site of Special Scientific Interest

1. Introduction and Context

The purpose of this document is to provide an overview of the Nature Improvement Area (NIA) monitoring and evaluation reporting tool:

- *The report is focused on the initial 12 NIAs – those that received government funding and support.*
- *The tool is envisaged as being available to other, locally-determined Nature Improvement Areas.*
- *The tool is accessible to registered users for data entry and administration, but is also available to the public to query and view indicator reports.*

1.1 Overview

The NIA Monitoring and Evaluation (M&E) Phase 1 project developed a website to manage the **M&E framework** reporting. This has been further developed within Phase 2 to resolve issues identified within the Year 1 M&E reporting and to add additional functionality.

An overview of the functionality of the tool is illustrated in Figure 3 from the perspective of different classes of users (see [section 1.3](#)).

The online reporting tool is also intended for use by Defra, Natural England, NIAs and other interested organisations and individuals, who may view the: **Project Reports** (review of the data across a theme for a selected NIA); and **National Reports** (reports across all NIAs that have used a selected indicator). The site is also accessible by the public who may access reporting without the need to register.

Only registered users can enter and edit data, and then that is restricted to the NIAs to which they are assigned. There are four classes of user (described in more detail in [section 1.3](#)), the super user, project level users (PLU), local level users (LLU) and national level users (NLU).

The website is accessible at <http://nia.naturalengland.org.uk/>.

Interface

- Use the **back button** from the Menu bar to go back to the previous page. The back button is context sensitive so only occurs in some pages that are cascades.
- When entering the Profile there is a breadcrumb trail to go back to sub-theme and themes.

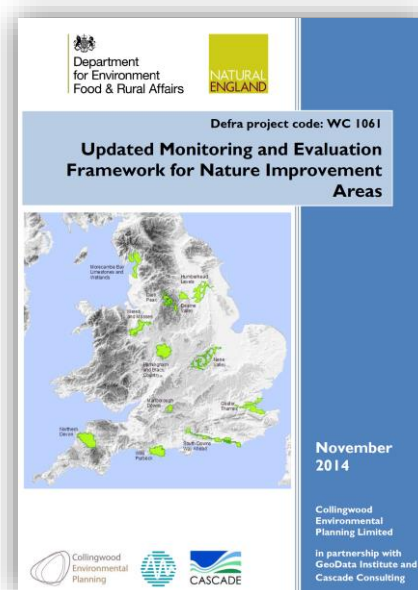


Figure 1: M&E Framework

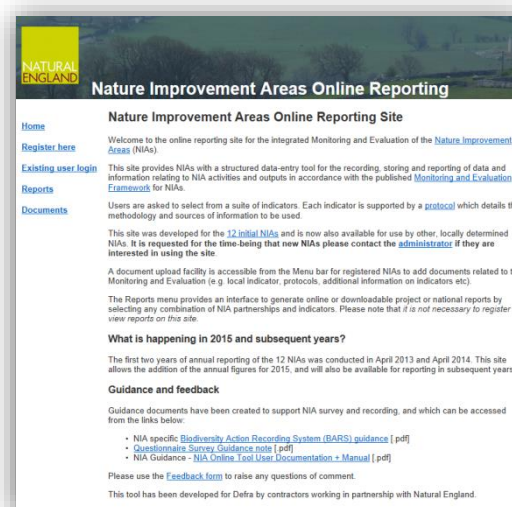


Figure 2: NIA Online Reporting Tool Home Page

10. Export of data and queried data

In addition, the system supports users through the access to guidance notes and feedback.

1.2 Indicators

Indicators are a main component of the M&E Framework.

The indicators are organised as **themes** and **sub-themes** (e.g. Biodiversity theme / Habitat sub-theme).

The user has to select indicators from each theme (i.e. Biodiversity; Ecosystem Services; Social and economic benefits and contributions to wellbeing; and Partnership working).

The user has to select a defined number of indicators from each **sub-theme**. These requirements are set out in the **M&E Framework** document.

Indicators may be **Core, Optional** or **Local**.

Table 1: Description of the core, optional and local indicators from the M&E framework

Core indicators are those indicators that all NIAs *must* select and report on. Core indicators have a protocol description which sets out **fixed data sourcing and indicator calculation methods** (i.e. all NIAs should use the same source/s of data and calculate indicator values using the same method). In recognition of the distinctive nature of each NIA, there is some flexibility to select NIA-specific features, for example in relation to habitat types or species.

Core indicators are comparable at the data level, meaning it is intended that it should be possible to combine and analyse data in a consistent manner across all NIAs.

Optional indicators Optional indicators recognise the diversity of the NIAs and the need to provide flexibility in the number and scope of the indicators. NIAs can choose those Optional indicators they feel will best help them measure progress against and report on the priorities and objectives in their own Business Plan (as long as the minimum number and different themes of Optional indicators are selected). All Optional indicators have a protocol, which describes the indicator purpose (i.e. what is being measured / indicated) and provides guidance on the data sources and calculation methods that should be used. NIAs must ensure that they record progress against the indicator purpose / outcome defined in the protocol. The protocols for Optional indicators provide guidance on methods, references and links to recommended data sources. However, there is some scope for NIAs to adapt the protocols to local circumstances.

Optional indicators are intended to be comparable across NIAs at the outcome level, meaning it is possible to report on the achievements of NIAs against a common indicator outcome (e.g. increased levels of outdoor recreation). Although standardised methods are strongly encouraged it is recognised that the available data will not necessarily be suitable for combination and analysis across all NIAs. The protocols seek to facilitate the use of common data collection and calculation methods and the aim is for data comparability where possible, particularly where it is an indicator being used by several of the NIAs.

Local indicators are indicators that are defined and developed by individual NIA partnerships. NIA partnerships may wish to develop Local indicators within particular sub-theme which are locally dependant and/or methods are not necessarily well developed, such as Ecosystem Services. Some potential local indicators already have protocols to guide the NIA partnerships and are therefore included in the indicator diagram in Appendix 1. However, the **NIA partnerships are also free to develop their own Local indicator even where the indicator diagram does not propose one using their own measures, data sourcing and calculation methods**. Local indicators reflect the research and innovation focus of the NIAs, and provide an opportunity for NIA partnerships to develop and explore their own measures to monitor their respective outcomes. The sharing of experience in developing local indicators is encouraged.

Local indicators are not intended to be comparable across NIAs as they reflect NIA-specific interests, although comparison will be possible where more than one NIA partnership collaborates to develop a local indicator. Where local indicators are used, NIA partnerships are requested to develop and submit protocols that describe the data, processing and analysis using the template protocol (see below and Appendix 2) to assist other NIA partnerships who may wish to adopt or adapt for similar indicators.

Seven Core indicators must be adopted by all the NIAs and these have standard protocols describing them to ensure for these indicators some compatible results that can be summarised nationally.

The NIAs need to monitor a selection of the Optional indicators to ensure integrated monitoring across the four themes.

A minimum of **14 indicators** in total covering all four themes should be selected by all NIAs, as detailed in Table 2.

NIAs are also encouraged to propose and use **additional Optional or Local indicators**. They are especially encouraged to do so in relation to ecosystem services, where NIAs may contribute to the development of new, practical approaches to monitoring and evaluation.

Table 2: NIA indicator selection requirements

Themes	Sub-themes	Indicator minimum selection requirements
Biodiversity	Habitat	A minimum of five indicators must be selected for this theme: <ul style="list-style-type: none"> • Three CORE habitat indicators ('Extent of habitat managed to improve its condition'; 'Extent of areas managed to restore/create habitat' and 'Total extent of priority habitat'). • One species indicator (not including invasive non-native species). • One CORE habitat connectivity indicator.
	Species	
	Connectivity	
Ecosystem Services	Cultural services	A minimum of three indicators must be selected for this theme: <ul style="list-style-type: none"> • One indicator of cultural services. • One indicator of regulating services. • One indicator of provisioning services. In addition, an indicator(s) of supporting services can be selected / developed if an NIA wishes. Ecosystem services are very location-dependent and methods for monitoring are not well-developed. NIAs therefore are encouraged to identify locally-specific issues and test approaches to examine their own local indicators.
	Supporting services	
	Regulating services	
	Provisioning services	
Social & economic benefits & contributions to wellbeing	Social impacts and wellbeing	A minimum of two indicators must be selected for this theme: <ul style="list-style-type: none"> • One CORE indicator on social impacts and well-being ('Number of volunteer hours on NIA activities'). • One indicator of economic values and impacts. Social and economic issues and priorities vary between NIAs and they may wish to explore a range of different options in this theme. NIAs may also wish to collect qualitative evidence and case studies, alongside the more quantitative data, to assist them in assessing issues and benefits such as: health; social cohesion; symbolic/spiritual/aesthetic; recreation; education and ecological knowledge; and business and investment.
	Economic values and impacts	
Partnership working	Mobilisation of resources	A minimum of four indicators must be selected for this theme: <ul style="list-style-type: none"> • Two CORE indicators of mobilisation of resources. • One indicator of efficient and effective delivery. • One indicator of leadership and influence.
	Efficient and effective delivery	
	Leadership and influence	

1.3 User classes

There are four user classes:

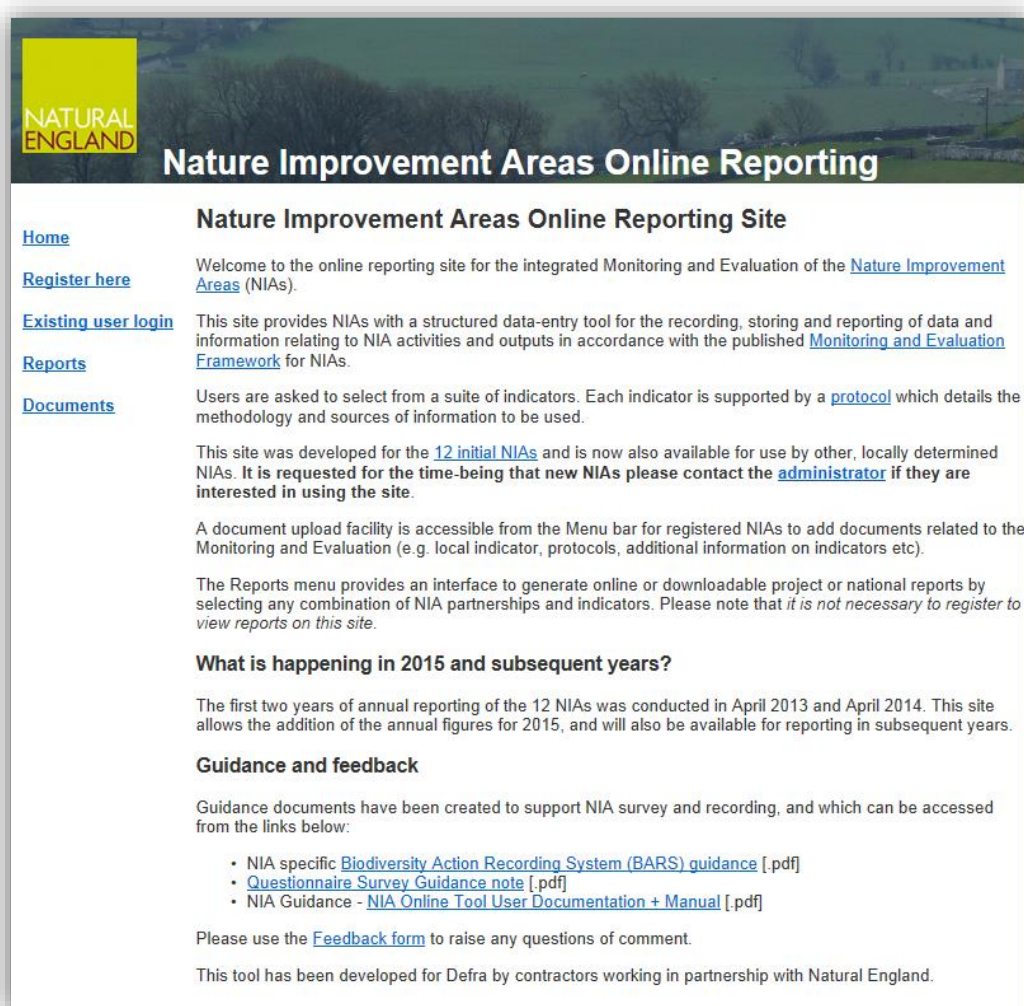
- **Project Level User (PLU)** - the PLU is the lead for the NIA project in relation to M&E. There can be only one PLU per NIA. The PLU has user management roles and accepts registrations from LLU to their NIA, accepts LLU nominations to edit individual indicators.

The PLU also establishes the Profile (the list of indicators to be entered).

If there is already a PLU assigned to an NIA it is not possible to register another and a request will be made to the SLU.

- **Local Level User (LLU)** - the LLU is typically assigned to individual indicators within a single NIA to enable the data entry caveat and narrative recording.
- **National Level User (NLU)** - the NLU is a national level data contributor. The NLU can register for one or many NIAs, and can request edit rights from the PLU of any NIA.
- **Super Level User (SLU)** - the super level user maintains the systems and registers the PLU.

1.4 Home page



The screenshot shows the home page of the Nature Improvement Areas Online Reporting Site. At the top left is the Natural England logo. The main heading is "Nature Improvement Areas Online Reporting". Below this, there is a navigation menu with links for Home, Register here, Existing user login, Reports, and Documents. The main content area is titled "Nature Improvement Areas Online Reporting Site" and contains a welcome message, a description of the site's purpose, and a list of links to guidance documents. The page also includes a section titled "What is happening in 2015 and subsequent years?" and a "Guidance and feedback" section.

Nature Improvement Areas Online Reporting Site

Welcome to the online reporting site for the integrated Monitoring and Evaluation of the [Nature Improvement Areas](#) (NIAs).

This site provides NIAs with a structured data-entry tool for the recording, storing and reporting of data and information relating to NIA activities and outputs in accordance with the published [Monitoring and Evaluation Framework](#) for NIAs.

Users are asked to select from a suite of indicators. Each indicator is supported by a [protocol](#) which details the methodology and sources of information to be used.

This site was developed for the [12 initial NIAs](#) and is now also available for use by other, locally determined NIAs. It is requested for the time-being that new NIAs please contact the [administrator](#) if they are interested in using the site.

A document upload facility is accessible from the Menu bar for registered NIAs to add documents related to the Monitoring and Evaluation (e.g. local indicator, protocols, additional information on indicators etc).

The Reports menu provides an interface to generate online or downloadable project or national reports by selecting any combination of NIA partnerships and indicators. Please note that *it is not necessary to register to view reports on this site*.

What is happening in 2015 and subsequent years?

The first two years of annual reporting of the 12 NIAs was conducted in April 2013 and April 2014. This site allows the addition of the annual figures for 2015, and will also be available for reporting in subsequent years.

Guidance and feedback

Guidance documents have been created to support NIA survey and recording, and which can be accessed from the links below:

- NIA specific [Biodiversity Action Recording System \(BARS\) guidance](#) [.pdf]
- [Questionnaire Survey Guidance note](#) [.pdf]
- NIA Guidance - [NIA Online Tool User Documentation + Manual](#) [.pdf]

Please use the [Feedback form](#) to raise any questions of comment.

This tool has been developed for Defra by contractors working in partnership with Natural England.

Figure 4: Home page online reporting tool

1.5 Feedback and Support

A **Feedback Form** allows the user to post any questions and comments.

Support is also available related to the indicators themselves, either through the feedback form or by contract with the administrator or [administrator](#), or [Rebecca Jackson-Pitt](#).

The indicator protocols are posted from the home page of the website. Each indicator falls within one of four themes. The full description of the protocols and M&E Framework are accessible on the home page and from the [Natural England NIA website](#).

Additional guidance notes which support specific indicators are also available from the home page:

- [BARS \(Biodiversity Action Recording System\)](#) – guidance on the NIA specific operation of the BARS recording and a FAQs style document for using BARS.
- [Questionnaire Survey Guidance](#) – support on the approaches to operating a questionnaire for partnership and socio-economic indicators.

The image shows a screenshot of a web browser window displaying a 'Feedback' form. The form has a title bar with 'Feedback' and a close button 'X'. The main content area starts with the text 'Please send us your feedback:'. Below this are several input fields: 'Name', 'Email', 'Telephone', and 'Organisation', each with a corresponding text box. Below these is a larger 'Comments' text area. At the bottom of the form are two buttons: 'Submit' and 'Clear'. Two orange callout boxes with lines pointing to the form provide additional information. The first callout box points to the 'Please send us your feedback:' text and contains the text: 'Anyone can provide feedback – you do not need to be registered'. The second callout box points to the 'Email' input field and contains the text: 'You must enter your email address as a minimum – you will see warning text'.

Figure 5: Feedback form - from Home page

1.6 Menu

There are separate menus for the different levels of users that reflect the functions of these groups.

SLU menu	PLU menu	Public menu	LLU menu
Home	Home	Home	Home
Project Home	Project Home	Register here	Session Home
Edit user profile	Edit user profile	Existing user login	Edit user profile
Add new project	Add new project	Reports	Assign to new project
Manage requests	Manage requests	Documents	Reports
User management	Reports		Documents
Reports	Documents		
Documents			

Figure 6: The menus for different levels of users

2. Registration, Login and User Management

2.1 Registration

As a **PLU** register for the existing NIA project.

PLUs have the option to also enter a new Project (i.e. a new Nature Improvement Area project).

New registration

[Home](#)
[Register here](#)
[Existing user login](#)
[Reports](#)

Username
Can only contain letters and numbers.

Email address

Password
Must be a minimum of seven characters.

Re-enter password :

Title

First name

Surname

Organisation

Telephone
Please do not leave spaces between digits

User level

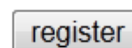
Register to existing project(s)
 Birmingham and Black Country NIA
 Test project, created by jezaustin (superadmin)
 ians test project

Figure 7: Registration panel

Entries are case sensitive.

As an **LLU** register for the existing NIA project.

Submit the registration by clicking the 'register' button.



Registration requests will be sent (by email notification) to the super user for the PLU.

Registration as a LLU will be sent to the PLU.

New registered user

NIA [staging] <root@debra12.geodata.co.uk>
Sent: Wed 02/04/2014 12:04
To: jezaustin@gmail.com; Hill C.T.; Waldock I.C.
Cc: Sadler J.D.; Sadler J.D.; Sadler J.D.

A new national-level user registration has been submitted by of .

Please login to the NIA reporting tool at <http://niadev.geodata.co.uk/project/viewrequests/> and approve or reject the request.

Figure 8: Registration email request to PLU

2.2 Login

Login to access the data management tools, by adding your Username and Password and clicking '[Login](#)'.

If you have forgotten your password click [Have you forgotten your password?](#)

Enter your Username (email address) and '[Send](#)'.

You will be sent a new secure link to re-enter a new password.

The screenshot shows a web form titled "Existing user login". On the left side, there are several navigation links: "Home", "Register here", "Existing user login", "Reports", and "< Back". The main form area contains two input fields: "User name:" and "Password:". Below these fields is a "Login" button. At the bottom of the form, there is a link that says "Have you forgotten your password?". An orange callout box with a pointer to this link contains the text: "Forgotten password? Select to be sent an email for a new password".

Figure 9: Existing user login

Once you are logged in a trail is shown on the top right hand side of the website, Click '[Logout](#)' to log out of this session.

A rectangular button with a light blue background and a thin border. The text inside the button is "[cth Logout]", where "cth" is in a smaller font and "Logout" is in a larger, bold font.

2.3 Manage Requests

PLUs and SLU can manage requests for new:

- i) Registrations
- ii) Project Access – grants access to the NIA 'project' within the online tool
- iii) Indicators – selections by LLU / NLU to be assigned to selected indicators on selected NIA projects
- iv) Project acceptance – only visible when there is a new Project assigned to a PLU
- v) SLU also gets to accept projects proposed by the PLU

Local-level and national-level users can make requests to manage individual indicators, which PLUs can approve or reject by going to '[Manage requests](#)'. These will show up in the Indicators bar.

The screenshot shows the 'Manage requests' interface. It includes a sidebar with navigation links: Home, Project Home, Edit user profile, Add new project, Manage requests, User management, and Reports. The main content area is titled 'Manage requests' and contains several sections:

- New registrations:** A table with columns: Firstname, Lastname, Role, Email, Action, Time Requested.
- Project access:** A table with columns: Project, User, Action, Time Requested. A row is shown for 'Birmingham and Black Country NIA' with user 'icw2' and actions 'Approve | Reject'.
- Indicators:** A table with columns: Project, Year, User name, Role, Action, Time Requested.
- New Projects:** A table with columns: Project title, Action, Time Requested.

Four callout boxes provide instructions:

- Top right: 'Approve or Reject for access to a project' (points to the Action column in the New registrations table).
- Middle right: 'View the requested indicators and Approve or Reject' (points to the Action column in the Project access table).
- Bottom right: 'View the requested indicators and Approve or Reject' (points to the Action column in the Indicators table).
- Bottom right: 'View the new projects (only available to the super level user)' (points to the Action column in the New Projects table).

Figure 10: Manage request dialog (SLU)

The Action column can be clicked and opens an **Indicators request** page.

PLUs can tick those requests posted by NLU or LLU to manage indicators. 'Approve selection' or 'Decline' the requests.

2.4 User management

The screenshot shows the 'Users' management page. It includes a sidebar with navigation links: Home, Project Home, Edit user profile, Add new project, Manage requests, User management, and Reports. The main content area is titled 'Users' and contains a table with the following data:

Firstname	Lastname	Role	Email	Projects	IsActive	Actions
		plu	icw@geodata.soton.ac.uk	Birmingham and Black Country NIA	Yes	Deactivate
		nlu	icw@geodata.soton.ac.uk		Yes	Deactivate
jez	austin	llu	jezaustin@gmail.com		Yes	Deactivate
est	ester	llu	jra@geodata.soton.ac.uk		Yes	Deactivate
Chris	Hill	superadmin	cth@geodata.soton.ac.uk		Yes	Deactivate
Rebecca	Jackson-Pitt	plu	rebecca.jackson-pitt@naturalengland.org.uk	Rebecca's Test Project	Yes	Deactivate

Figure 11: Super Level User, User Management page (SLU)

The super level user can 'Activate' and 'Deactivate' the users who have requested registration from the **User management** page.

2.5 User Profile

Once you are registered and logged in you can **Edit User Profile**.

This allows you to update your profile held on the database and specifically to change the password. Enter the required fields within the dialog box and Click *Change your password*.

Edit user profile	
Email address	cth@geodata.soton.ac
Current password	<input type="password"/>
New password	<input type="password"/> Your password must be a minimum of seven characters.
Confirm your new password	<input type="password"/>
<input type="button" value="Change your password"/>	

Click 'Change your password' to commit the changes

Figure 12: Edit profile dialog

2.6 LLU registration / assignment to projects and indicators

LLUs register in the same way as PLUs, they:

- Re-register as a LLU / NLU
- Enter details (please use your initials and (e.g. **username / password**)
- Select 'LLU' as the level of registrant
- Request a NIA project to register to (*choose the NIA project listed in the interface*)
- Click '**Submit**'

An email will be sent to the PLU of that NIA project (as shown below)



Figure 13: Email informing PLU of an LLU application (open in an email client)

The PLU will then go to 'Manage Users' to **accept** or **reject** the requests from the LLU.

PLU selects the options to new registrations the LLU to the project access: '*Accept*' or '*Reject*' - to grant or deny project access.

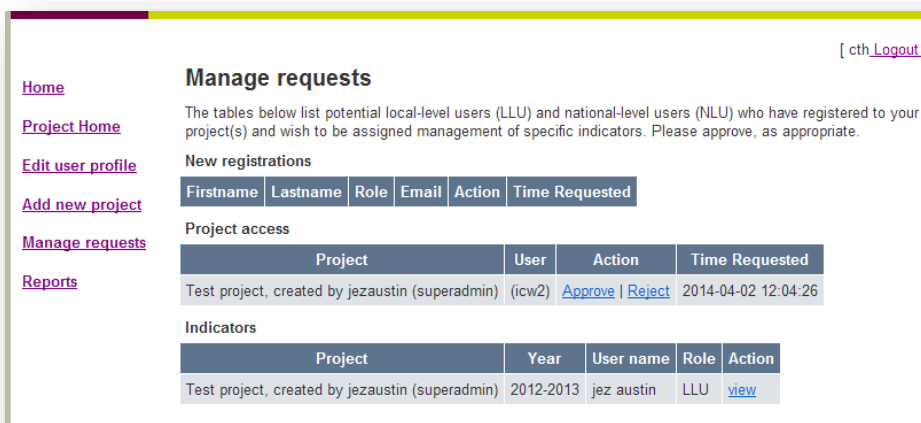


Figure 14: Manage requests for the PLU to accept or reject LLU requests

Following registration, once the LLU logs in again the home page (**Session Home**) gives them options to **Register indicators** within the projects that they are accepted onto and allows them to **Enter data**.



Figure 15: Local level user home page - for registration to indicators

The 'Register indicators' page opens to the **Indicator selection page** that allows the LLU to tick the indicators that they wish to register for. 'Submit', submits the request to the PLU who will process these requests (via and email notification).

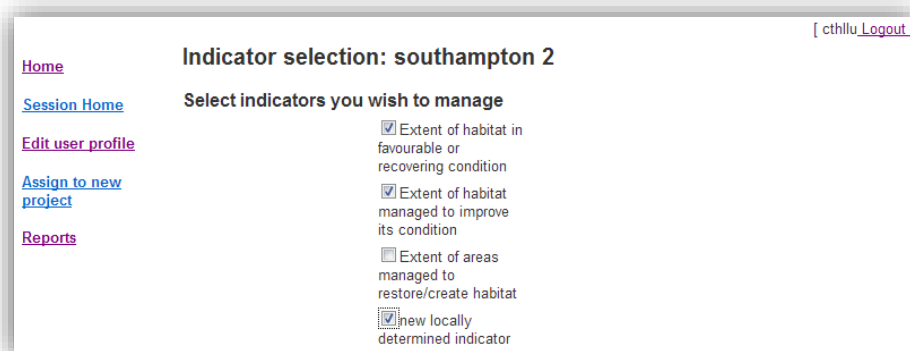


Figure 16: LLU selection of indicators page

PLU follows the context sensitive help in this dialog to 'Approve selection' or 'Decline'. More than one indicator may be requested by the LLU/NLU.

For the indicators that LLU have asked to be assigned – the PLU should click 'View'. This launches a new page that shows which indicators the LLU has requested permission from the PLU to enter the data and caveats and narrative.

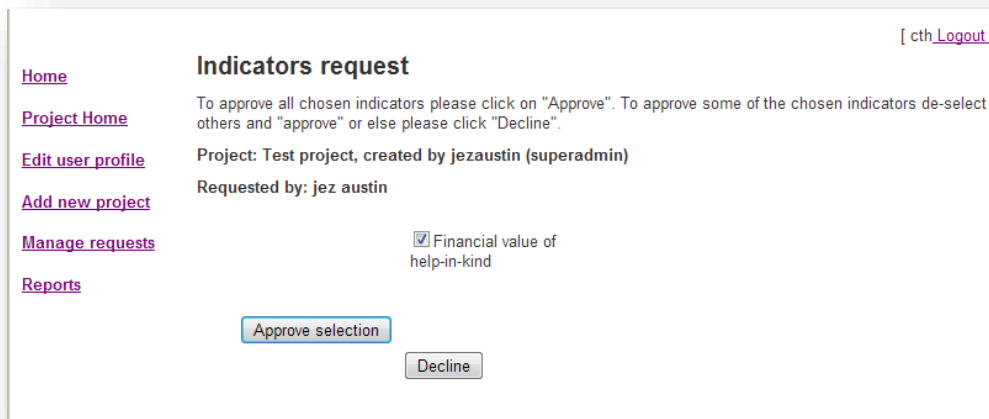


Figure 17: PLU view of the LLU request to access an indicator - which the PLU Approves or Declines

‘Tick’ or ‘untick’ the requested indicators to accept or decline the entries and click ‘*Approve selection*’ or ‘*Decline*’ accordingly.

Once these permissions are granted the LLU can login and return to the **Session Home** and select ‘*Enter data*’. The selected indicators will show, but only if the PLU has accepted these.

3. Creating a Profile

This function allows you to ascribe the indicators that your NIA project wants to fill in. The profile recognises the rules for the minimum number of indicators in each of the core and optional themes and subthemes. See Table 2 [section 1.2](#). The rules are also set out diagrammatically in section X.

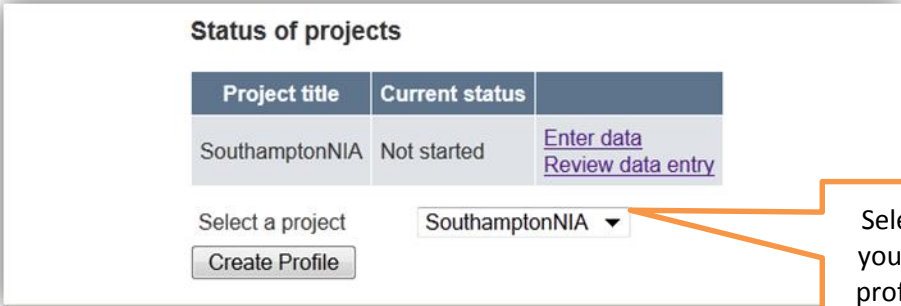
The process allows the user (PLU) to:

- Select Project
- Select a theme
- then select the sub-theme and
- then select the indicators
- create local indicators

Profiles are created by PLUs only.

- From the **Home page for Project level users** select the project from the dropdown.
- Select a project (if you have created more than one project select from the dropdown list). If there is just one project than that will be the default project for which the profile will be created.
- Click the ['Create Profile'](#).

Select Project



The screenshot shows a web interface titled "Status of projects". It contains a table with the following data:

Project title	Current status	
SouthamptonNIA	Not started	Enter data Review data entry

Below the table, there is a "Select a project" label, a dropdown menu currently showing "SouthamptonNIA", and a "Create Profile" button. An orange callout box points to the dropdown menu with the text: "Select the Project that you want to create the profile for and the click 'Create Profile'".

Figure 18: Creation of Profile (choosing indicators for your project)

- Select a theme using the radio buttons – e.g. Biodiversity
- Click ['continue'](#) you are returned to the **Theme selection** page

[Continue](#)

Select Theme

[Home](#) Project Selected:

[Project Home](#) **southampton 2**

[Edit user profile](#)

[Add new project](#)

[Manage requests](#)

[Reports](#)

Please select each theme and sub-theme in turn to choose and propose those indicators on which you wish to report in accordance with the monitoring and evaluation framework for NIAs. To return to this page at any stage during the process, please click on 'Theme selection' at the top of each page.

A green tick means that you have successfully selected all indicators required for that theme. A yellow circle highlights that you have not yet selected indicators required in relation to at least one sub-theme. A red cross indicates that you have not started your selection for a theme.

A 'Submit profile' button will appear when you have completed selection of indicators for all themes.

Please select a theme:

- Biodiversity
- Ecosystem services
- Social & economic
- Partnership working

Context sensitive help

Themes indicating that these are not completed

Figure 19: Select theme from the create profile sequence

Select a sub-theme from the next page. If the subthemes are required they are already greyed out. The optional sub-themes can be selected (e.g. invasive species in this case).

Select sub-themes

Please select optional sub-themes, as appropriate, then click 'Continue' to choose and propose those indicators on which you wish to report in accordance with the monitoring and evaluation framework for NIAs.

Core sub-themes

- Habitat
- Species
- Habitat connectivity

Select optional sub-theme

- Invasive species

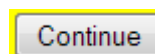
Figure 20: Select optional sub-theme from the create profile sequence

- Click 'continue', you are taken to the subtheme page. There is a breadcrumb trail at the top of the page that indicates on which page you are located. Use these links to navigate backwards. You can navigate backwards at any time.

Select Sub-theme

Figure 21: Select sub-theme from the create profile sequence

- Select a sub-theme using the radio buttons – e.g. Habitat
- Click 'continue' you are returned to the **Select indicators** page



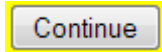
Select indicators

Figure 22: Select indicators for each sub-theme from the create profile sequence

This screen allows you to select the indicators. In this instance we selected the habitat subtheme and therefore this screen shows the two Core indicators greyed out as these are preselected. The optional

indicators can be included in the profile by clicking the tick boxes; in this instance the 'Extent of habitat in favourable or recovering condition' has been selected.

- Click 'Continue' commits the selection of the indicator
- You are returned to the **Select indicators** page where you can add a user defined indicator.



If you are creating **Local indicators you can select from a drop down** that includes the indicators that other NIAs have created – this is included so that NIAs can learn from each other and share effective indicators and protocols.

Sub theme selected

Habitat

Please enter the name of a new indicator for this sub-theme specific to your project, if you so wish. The data entry field uses a 'fuzzy search', so the names of similar indicators proposed by other projects may appear from which you can either select or continue to add your new indicator. Please follow the links at the top of the page to choose or propose more indicators for other themes or sub-themes, in accordance with the monitoring and evaluation framework for NIAs. If you have completed your selection for all themes, please return to 'Theme selection' to submit your project profile.

Add new indicator (optional)

Add indicator

Indicators selected for current subtheme

- Extent of habitat in favourable or recovering condition
- Extent of habitat managed to improve its condition
- Extent of areas managed to restore/create habitat

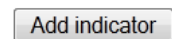
Callout 1: Allows user to input a new, local indicator name

Callout 2: List of selected optional indicators and pre-selected core indicators

Figure 23: Adding a local indicator to the sub-theme within the create profile

This shows the already selected indicators at the bottom (two core indicators and one optional). The context sensitive help indicates that there is a fuzzy search available – thus for example typing 'low' will bring up a list of indicators with the word 'low' in – e.g. lowland heathland, lowland calcareous grassland etc from which you can select. This works in all local indicator dialog boxes.

- Select an 'Add indicator' to add the locally determined indicator to the list of selected indicators that then appears at the bottom as a selected new indicator



Indicators selected for current subtheme

- Extent of habitat in favourable or recovering condition
- Extent of habitat managed to improve its condition
- Extent of areas managed to restore/create habitat
- new locally determined indicator

Callout: Newly created indicator added to the list of other selected indicators

Figure 24: Listing of the selected indicators

You can only enter a new indicator where local indicators are permitted by the M&E Framework.

Having selected all the indicators or added a local indicator you can use the breadcrumb trail to link back to add a new sub-theme.



Figure 25: Breadcrumb trail used to navigate within the Create Profile pages

The result shows that the habitat sub-theme has been completed and that the habitat sub-theme shows a green tick against it to indicate that the sub-theme indicators have all been selected. Continue the same sequence of sub-theme / indicator selection until all the sub-themes are ticked.

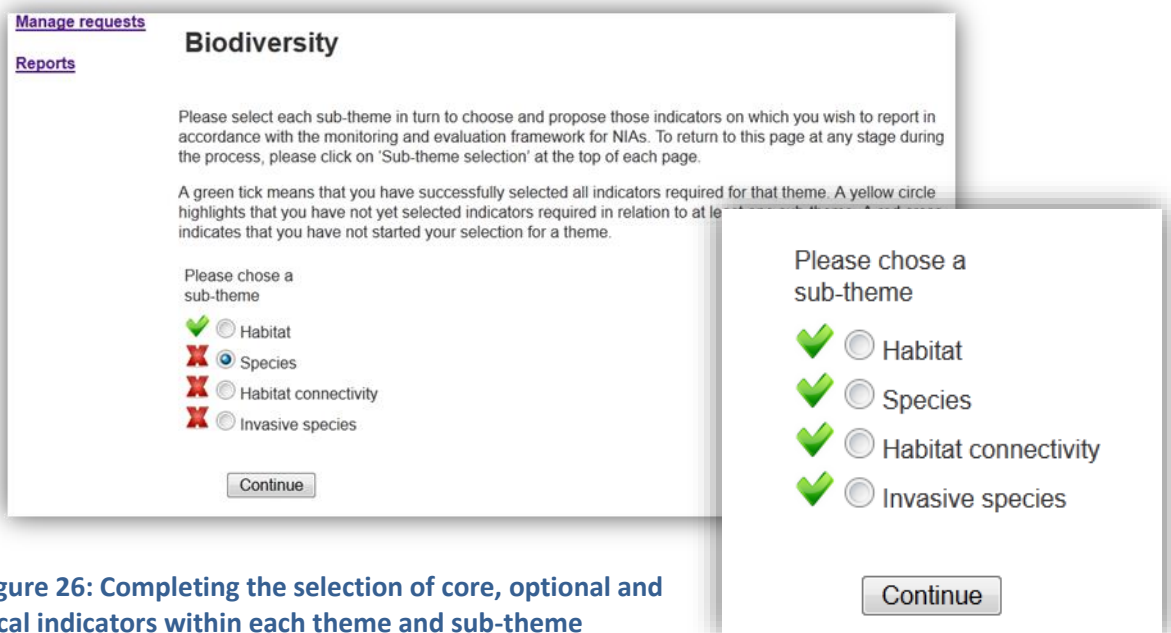
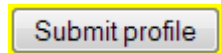


Figure 26: Completing the selection of core, optional and local indicators within each theme and sub-theme

Continue this process with each of the Themes till all the themes also have a green tick against them.

Once all the Themes are ticked select the 'Submit profile' button to save the profile.



Once you have selected an indicator you cannot select it – even before submissions, although you can add new indicators or local indicators to the sub-themes. You can also add an optional theme if you did not add this first time prior to submission.

You are not able to edit the profile once submitted.

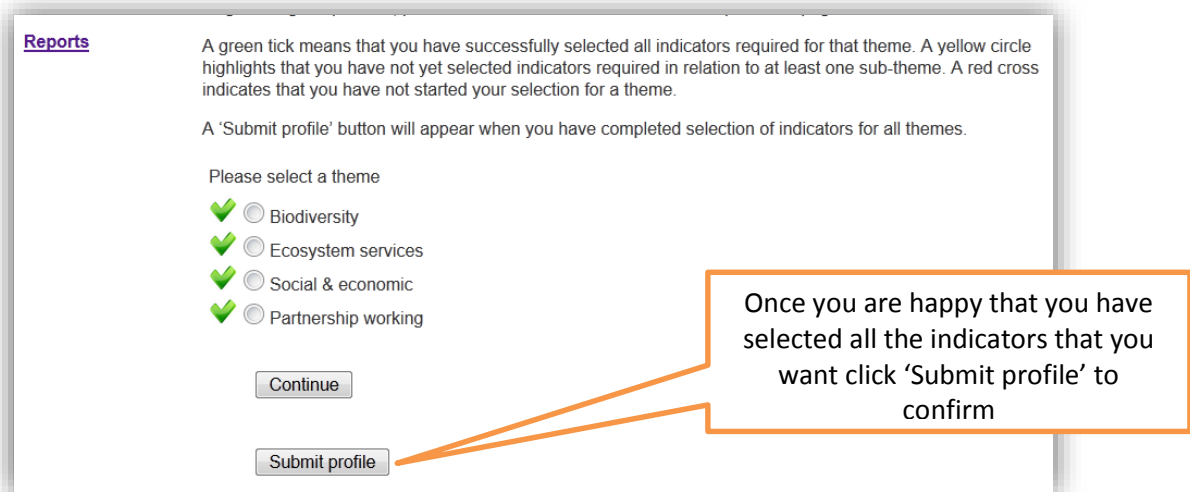


Figure 27: Submit the indicator profile

Having submitted the profile you are asked to confirm the submission.

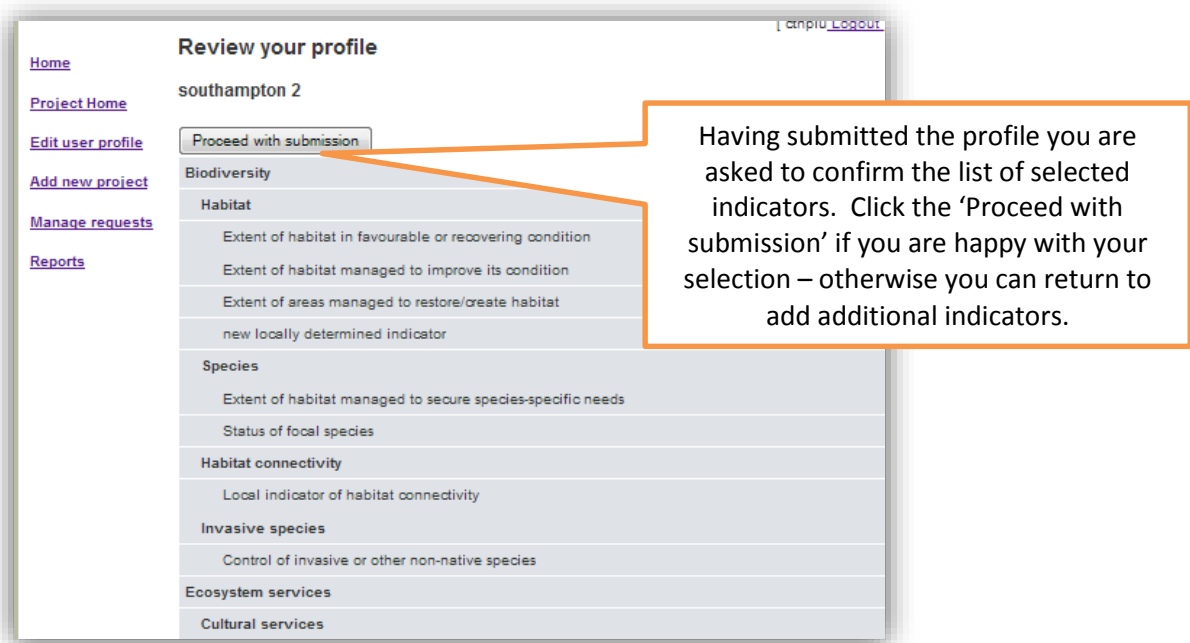


Figure 28: Confirmation of the intention to submit the indicator profile

If you need to make changes please email the administrator or enter a feedback form request.

Select the Project Home from the menu bar to start adding data to your newly created listings.

4. Enter data, caveats and narrative and review

4.1 Creation of the features to be recorded within the Indicators

Go back to the home page, **Project Home**.

Select 'Enter data' for an indicator you have created.

For Core Indicators there are pre-set (for some Core indicators) but in the case of Habitat Core indicators you get to choose the Priority Habitats that you enter data against.

For species level indicators you are asked to record the species of relevance to your NIA. You can ensure that the species names are consistent by accessing the NHM website.

Theme Biodiversity; Species sub-theme

Uses a link to the Natural History Museum ([NHM species dictionary](#)) to identify the species names from the checklists.

You can type in a name (in Latin or in English). If you don't know the name you are directed to the NHM checklists which can be used to find consistent naming. Select the most appropriate species lists for the Group that you want to record (e.g. Botanical Society of Britain and Ireland (BSBI) vascular plants and stoneworts).

For example: Theme Biodiversity; Species sub-theme

Uses a link to the [NHM species dictionary](#) to identify the species names from the checklists.

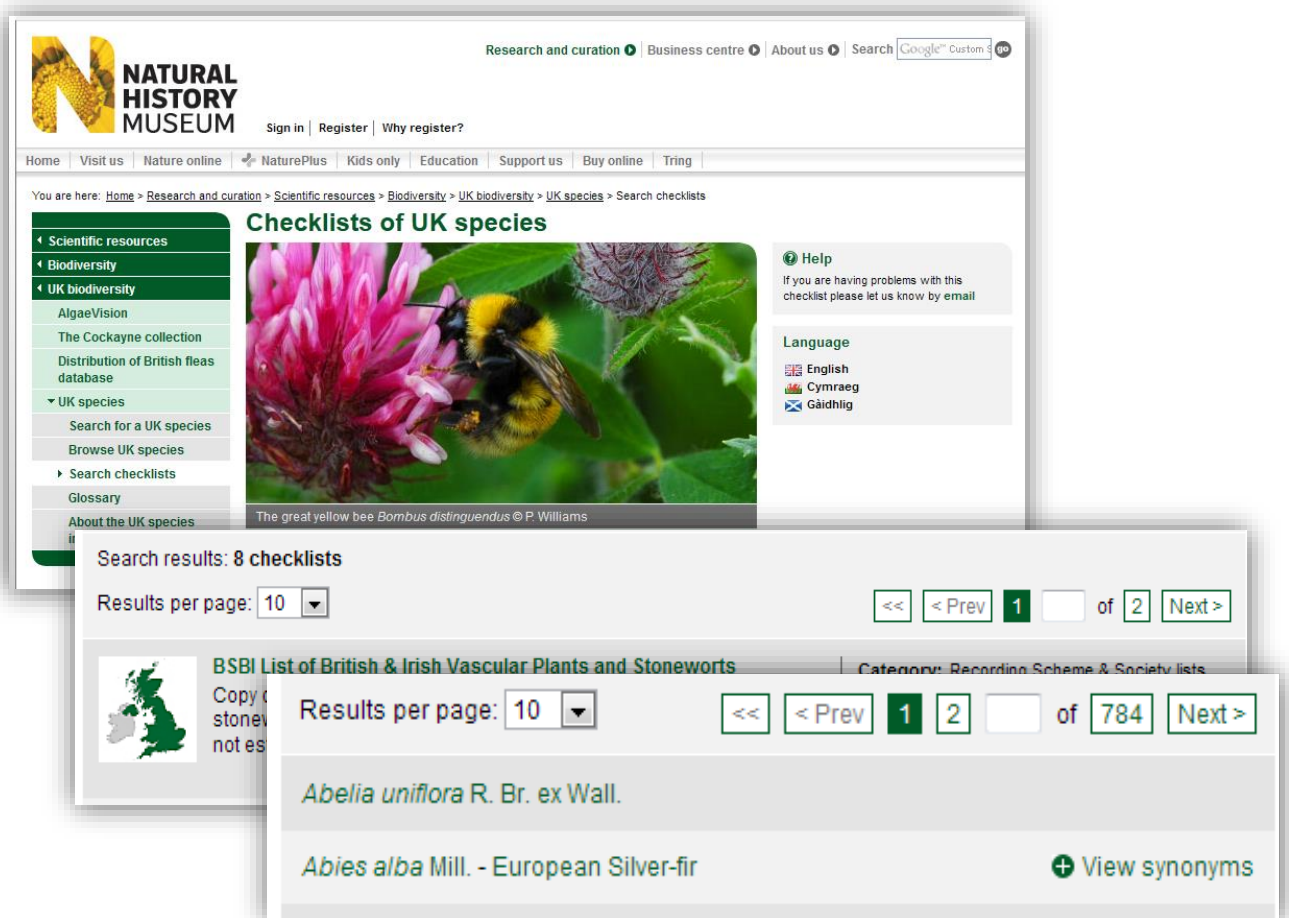


Figure 29: Selecting species names within features by using dictionaries

The PLU is assigned to all the indicators not assigned elsewhere. Enter data, caveats and narrative for each of the indicators, which PLU have not assigned to local-level or national-level users.

LLU / NLUs can only enter the records, caveats and narrative for which they have been assigned. PLUs cannot enter indicator records that they have assigned to the LLU/NLU, but can review the data entries made by these levels.

From the home page for project-level users select the *'Enter data'*

Project title	Year	Current status	
Test project, created by jezaustin (superadmin)	2012-2013	In progress	Enter data Review data entry




Figure 30: Entering data / review data navigation

This brings up the list of indicators selected by the NIA.

Here you have option to *Enter data*, *Enter caveats* or *Enter narrative*.

Project: Test project, created by jezaustin (superadmin) (2012-2013)					
Status	Assigned to	Indicator			
Submitted up to 2012-13	Unassigned	B01_H	Extent of habitat managed to improve its condition	Enter data	Enter caveats Enter narrative
Submitted up to 2012-13	Unassigned	B02_H	Extent of areas managed to restore/create habitat	Enter data	Enter caveats Enter narrative
No Features	Unassigned	B03_H	Extent of habitat in favourable or recovering condition	Enter data	Enter caveats Enter narrative



Figure 31: Enter data dialog

This interface describes:

- the Status (of submission),
- whom (LLU) assigned (by the PLU) to enter the data (i.e. where indicators are assigned to a LLU for entry)
- indicator name and the numbering

For example, enter data for the indicator with a status of No Features:

'Extent of habitat in favourable or recovering condition'

Click *'Enter Data'*

This brings up a dialog that allows you to enter priority habitat names.

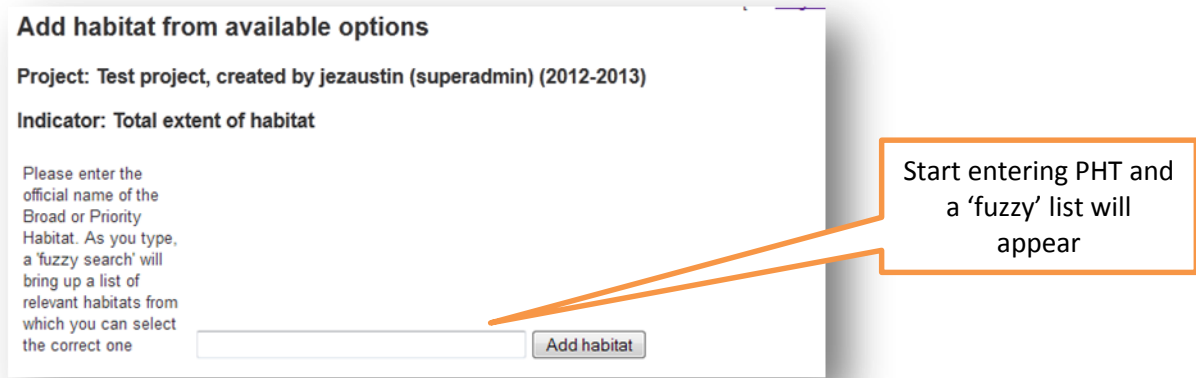


Figure 32: Entering the names of features within the indicator

A fuzzy search is available: Start typing a habitat type and this will start to list the PHTs available with those letters/words as a dropdown. Select from the dropdown. E.g. 'Lowland' brings up lowland calcareous grassland, lowland heathland etc – that allows you to then select the appropriate habitat name.

You are allowed to enter your own text if you want (i.e. if the habitat is not a PHT) – e.g. 'other habitat', but be aware that the protocol may call for the habitat to be PHT.

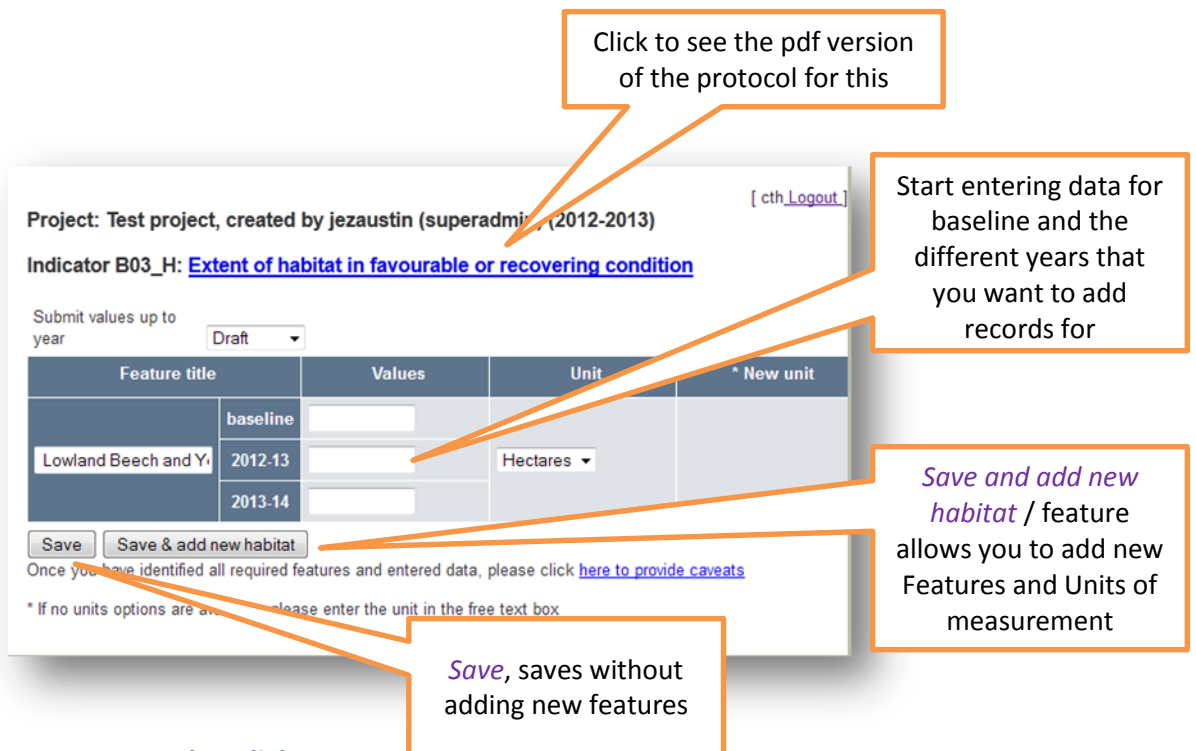


Figure: 33 Enter data dialog

At this point you either start data entry – for baseline or year on year record or you can 'Save' or 'Save & add new habitat' if there are more features to record.

For some indicators you can also select the indicator units, and can add one or more units by separating by a comma (e.g. km, metres). Use the context sensitive help to enter these values.

Some of the biodiversity indicators take an “action status”, which allows you to specify whether a data series is “planned”, “underway” or “completed.” Typically you might list a habitat three times (one for each action status), or fewer if you don’t need all of them.

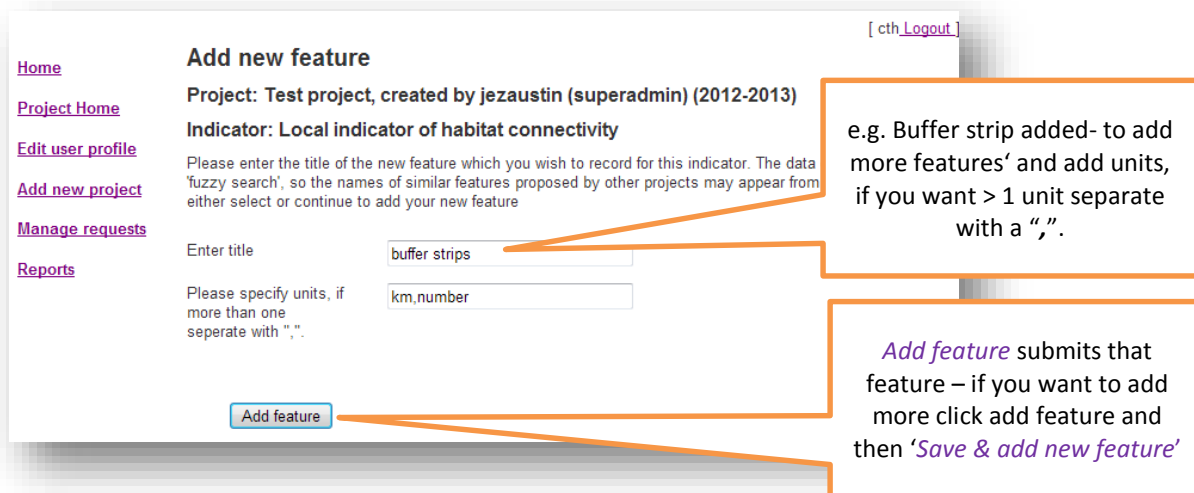


Figure 34: Dialog for entering additional features from the data entry page

Once you have entered all the features that you need enter the baseline and / or annual records.

You can select from the dropdown **Submit vales up to year from the list.** This function locks the records and submits these (in order to prevent changes to annual figures). If you leave this as draft the records are still recorded in the database.

4.2 Caveat Entry

The NIAs are encouraged to enter ‘**Caveats**’ (that describe the baseline, data and model uncertainty) and a ‘**Narrative**’ (that can be used by the NIA to describe and interpret the monitoring results and to enter qualitative indicators).

Caveat entry can be selected from the **data entry page** or at the end of entering records for an individual indicator.

Please click [here to provide caveats.](#)

Project: Test project, created by jezaustin (superadmin) (2012-2013)

Status	Assigned to	Indicator		
Submitted up to baseline	Unassigned	Length of accessible PROW and permissive paths	Enter data	Enter caveats Enter narrative

Click to ‘Enter caveat’

Figure 35: Entering the Caveats

Click 'Enter caveat'.

The screenshot shows the 'Caveat entry' form. At the top, it displays 'Project: Test project, created by jezaustin (superadmin) (2012-2013)' and 'Indicator: No. of enquiries'. A note states: 'Please note that you are limited to entering 500 characters in each of these fields.' The form has five text input fields: 'Baseline' (containing 'bb'), 'Data collection', 'Model uncertainty', and 'Other'. A dropdown menu for 'Submit values up to year' is set to 'Draft'. A 'Save' button is at the bottom left. Three callout boxes with orange borders provide instructions: the first points to the dropdown menu, the second points to the text input fields, and the third points to the 'Save' button.

Select from the dropdown the year up to which you want the values to be considered submitted, or "Draft" if none are ready for submission

Enter caveat data on the quality of data, modelling and other limitations of the indicator

Click 'SAVE' to save the record

Figure 36: Enter caveats page

Submit values up to: allows you to record that the records have been submitted up to a particular year. This does not lock the record and you can go back and enter caveats (and narrative) records year on year. There is no new Caveat record each year, but you can add to the existing record.

A close-up of the 'Submit values up to year' dropdown menu. The text 'Submit values up to year' is on the left, and the dropdown menu on the right shows 'Draft' as the selected option.

Figure 37: Submission of variables

Save the record by clicking the 'Save' button at the bottom of the page.

4.3 Enter Narrative

Select the enter narrative from the project data entry page.

Project: Test project, created by jezaustin (superadmin) (2012-2013)

Status	Assigned to	Indicator		
Submitted up to baseline	Unassigned	Length of accessible PROW and permissive paths	Enter data	Enter caveats Enter narrative

Figure 38: Entering the Narrative



Click to 'Enter narrative'

Click 'Enter narrative'

Entering records into the Narrative box creates HTML – that can go into website descriptions / reporting.

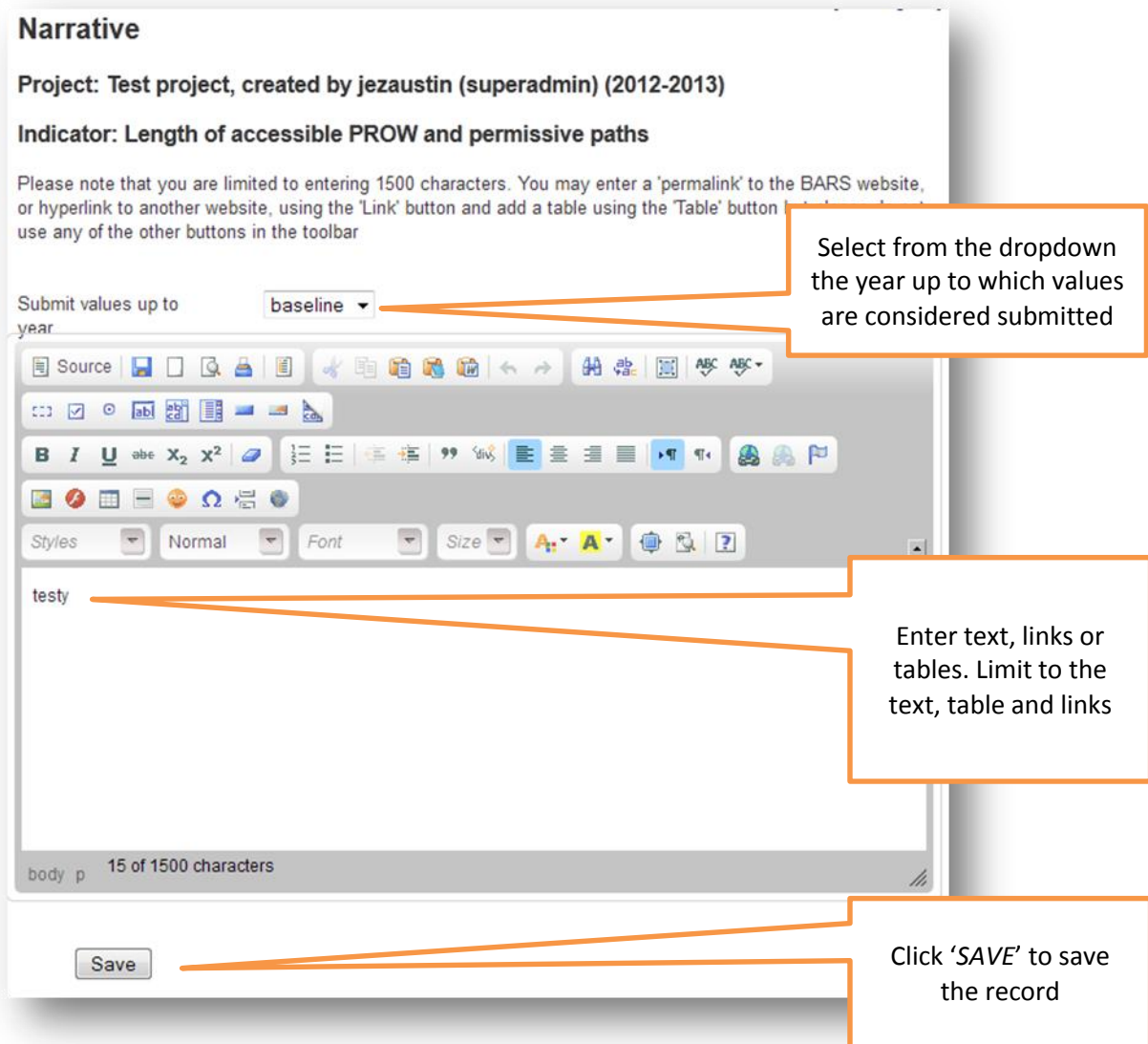
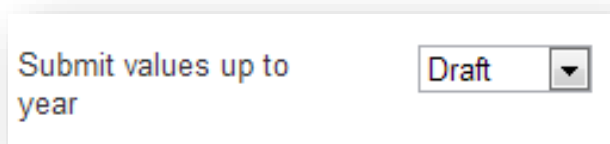


Figure 39: Narrative data entry screen

The data entry allows you to enter a record. You can enter a 'permalink' to the BARS website or hyperlink to another website, using the 'Link' button and add a table using the 'Table' button but please do not use any of the other buttons in the toolbar.

The user is limited to 1500 characters. The narrative can be updated to reflect changes from the subsequent years of data entry.



Submit values up to year: once the data entered against a given year and is considered final, the PLU should advance the "Submit values up to year" drop-down to the year in question. Values for later years will remain open to LLU edits, but earlier values are read-only (though still editable by the PLU or SLU). The dropdown is available while entering data, caveats or narrative.

'Save' the record by clicking the button at the bottom of the page.

4.4 LLU data entry and Review

Data entry by the LLU is based on the registration and acceptance of the LLU onto the NIA project, administered by the PLU.

Once the LLU has input the data the PLU can review the data. Access this from the Project home page. From the Home page for the project level user select the **Review data entry**.

The screenshot shows a web interface titled "Status of projects". It features a table with the following columns: "Project title", "Year", "Current status", and an unlabeled column for actions. The table contains one row: "Test project, created by jezaustin (superadmin)", "2012-2013", "In progress", and two links: "Enter data" and "Review data entry". Below the table is a "Select a project" dropdown menu with the same project name selected, and a "Create Profile" button. An orange callout box points to the "Review data entry" link with the text: "Review Data entry / Caveats and Narrative – reviews the data saved by the LLU".

Project title	Year	Current status	
Test project, created by jezaustin (superadmin)	2012-2013	In progress	Enter data Review data entry

Select a project: Test project, created by jezaustin (superadmin) ▼

Create Profile

Review Data entry / Caveats and Narrative – reviews the data saved by the LLU

Figure 40: Review data entry access from the NIA project home page

Review the records from the LLU entered data, caveats and narrative. You will be able to see all the indicators and their records within this view – whereas within the Enter data the PLU can only see the unassigned indicators.

5. Reporting and data download

5.1 Reporting

Users (all levels) can query the data for reporting and download – and all have access to the same functionality. Queries are based on a cascading selection and can be based on:

- Project – the Nature Improvement Area project
- Year - reporting year
- Themes – the four themes (Biodiversity; Ecosystem Services; Social and economic benefits and contributions to wellbeing; and Partnership working)
- Subthemes
- Indicators

Reporting can be for one or many projects, years, themes and subthemes but at least one indicator must be selected. Reporting will only produce a table of results if there are records within the selected indicators. You can *Select all* or *Unselect all* to include or exclude all the items.

Selecting the NIA Project will tailor the reports interface by the specific indicators selected within the Project profile. The record form is dynamic so you will only see records if records exist / have been entered for the indicator / caveat or narrative.

The report is presented as a table which is dynamically structured based on the records within the database. Thus if the baseline and Year 1 is reported with no Caveat and Narrative then the report will be limited to these records.

The screenshot shows the 'Reports' interface with the following sections and options:

- Navigation:** Home, Register here, Existing user login, Reports.
- Instructions:** Please filter the report using the controls below.
- Projects:**
 - select all | unselect all
 - Birmingham and Black Country NIA
 - ians test project
 - Test project, created by jezaustin (superadmin)
- Years:**
 - select all | unselect all
 - baseline
 - 2012-13
 - 2013-14
- Themes:**
 - select all | unselect all
 - Biodiversity
 - Ecosystem services
 - Social & economic
 - Partnership working
- Subthemes:**
 - select all | unselect all
 - Biodiversity:**
 - Habitat
 - Species
 - Habitat connectivity
 - Invasive species
- Indicators:**
 - Habitat:**
 - Extent of habitat managed to improve its condition
 - Total extent of other PHTs
 - Extent of areas managed to restore/create habitat
 - new indicator
 - Extent of habitat in favourable or recovering condition
 - test
 - Total extent of habitat
 - hhhh
- Buttons:** View report, Download

Figure 41: Report view and data download

Click **View report** to see the results of the query.

Birmingham and Black Country NIA

[Home](#)

[Project Home](#)

[Edit user profile](#)

[Add new project](#)

[Manage requests](#)

[Reports](#)

Biodiversity

Subtheme	Indicator	Feature	baseline	2012-13	
Habitat	Extent of areas managed to restore/create habitat	BAP Grassland (Hectares (ha))	56.33		
		Boundary & Linear Features	1.13		
		Broadleaved	11.59		
		Fen Marsh and Swamp	11.74	-	
		Hedgerows	0.36	-	
		Lowland Fens	-	-	
		Lowland Heathland	506.61	-	Caveat
		Lowland Mixed Deciduous Woodland	39.06	-	Narrative
		Neutral Grassland	43.18	-	
		Ponds	6	-	

Figure 42: View report screen - showing access to the caveat and narrative records

5.2 Download

Click **Download** to see the results of the query as an Excel spreadsheet.

Download – view as an Excel spreadsheet - click **Open** – to open the file or **Save** – to save to a user-defined file location.

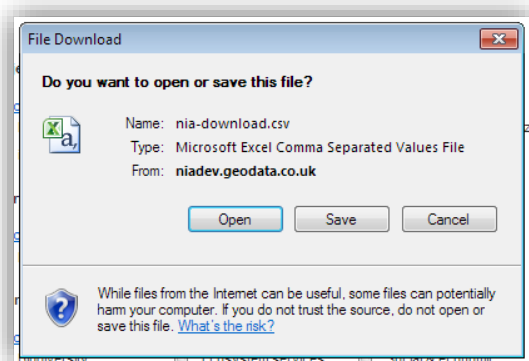


Figure 43: Download dialog box - allowing you to open or save the spreadsheet created from the query

Open opens up and Excel file – alternatively you can **Save** to store the file locally.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Project	Theme	Subtheme	Indicator	id	profile_id	indicator_status	created	assigned	last_save	submitte	project_id	financial_r	
2	Birmingham	Biodiversi	Habitat	Extent of		7	7	2 Complete	#####	1	122	0	3	2012-2013
3	Birmingham	Biodiversi	Habitat	Extent of		7	7	2 Complete	#####	1	122	0	3	2012-2013
4	Birmingham	Biodiversi	Habitat	Extent of		7	7	2 Complete	#####	1	122	0	3	2012-2013
5	Birmingham	Biodiversi	Habitat	Extent of		7	7	2 Complete	#####	1	122	0	3	2012-2013
6	Birmingham	Biodiversi	Habitat	Extent of		7	7	2 Complete	#####	1	122	0	3	2012-2013
7	Birmingham	Biodiversi	Habitat	Extent of		7	7	2 Complete	#####	1	122	0	3	2012-2013
8	Birmingham	Biodiversi	Habitat	Extent of		7	7	2 Complete	#####	1	122	0	3	2012-2013
9	Birmingham	Biodiversi	Habitat	Extent of		7	7	2 Complete	#####	1	122	0	3	2012-2013
10	Birmingham	Biodiversi	Habitat	Extent of		7	7	2 Complete	#####	1	122	0	3	2012-2013
11	Birmingham	Biodiversi	Habitat	Extent of		7	7	2 Complete	#####	1	122	0	3	2012-2013
12	Birmingham	Biodiversi	Habitat	Extent of		7	7	2 Complete	#####	1	122	0	3	2012-2013
13	Birmingham	Biodiversi	Habitat	Extent of		7	7	2 Complete	#####	1	122	0	3	2012-2013
14	Birmingham	Biodiversi	Habitat	Extent of		7	7	2 Complete	#####	1	122	0	3	2012-2013
15	Birmingham	Biodiversi	Habitat	Extent of		7	7	2 Complete	#####	1	122	0	3	2012-2013
16	Birmingham	Biodiversi	Habitat	Extent of		7	7	3 Complete	#####	0	136	0	3	2012-2013
17	Birmingham	Biodiversi	Habitat	Extent of		7	7	1 Complete	#####	1	139	0	3	2012-2013

Figure 44: Download of the Excel spreadsheet from the query

Appendix: M&E Indicator Table

Sub-theme	Indicator category	Indicator code	Indicator title
Theme: Biodiversity			
Habitat	Core	B01	Extent of existing priority habitat managed to maintain and/or improve its condition
	Core	B02	Extent of areas managed to restore / create habitat
	Optional	B03	Proportion of SSSIs in favourable or recovering condition
	Core	B04	Total extent of existing priority habitat
Species	Optional	B05	Extent of habitat managed to secure species-specific needs
	Optional	B06	Status of widespread species
	Optional	B07	Status of focal species
	Optional	B08	Control of invasive non-native species
Connectivity	Optional	B09	Optional indicator of habitat connectivity
	Core	B10	Comparative indicator of habitat connectivity
Theme: Ecosystem Services			
Cultural	Optional	ES01	Measure of extent of land managed to maintain and/or enhance landscape character
	Optional	ES02	Length of Public Rights of Way (PROW) and permissive paths created and/or improved
	Optional	ES03	Condition of historic environment features
	Optional	ES04	Access to natural greenspace and/or woodland
Supporting	Optional	ES05	Area of habitat supporting pollinators
Regulating	Optional	ES06	Contribution of water quality
	Optional	ES07	Contribution to carbon storage and sequestration
Provisioning	Optional	ES08	Area of more sustainable agricultural production
	Optional	ES09	Percentage of woodland in active management
Theme: Social and Economic			
Social impacts and well-being	Optional	S&E01	Attitudes of local communities to the natural environment and environmental behaviours
	Optional	S&E02	Number of people participating in educational visits
	Optional	S&E03	Number and social mix of visitors to NIA sites
	Optional	S&E04	Number and social mix of people attending NIA activities and events
	Optional	S&E05	Level of outdoor recreation in the local community
	Core	S&E06	Number of volunteer hours on NIA activities
Economic values and impacts	Optional	S&E07	Estimated value of visitor expenditure to the local economy
	Optional	S&E08	Number of people employed in the NIA activities
	Optional	S&E09	Estimated value of ecosystem services in the NIA
Theme: Partnership Working			
Mobilisation of resources	Core	PW01	Project income
	Core	PW02	Financial value of help in-kind
Efficient and effective delivery	Optional	PW03	Fulfilment of identified skills needs
	Optional	PW04	Attitudes of local community to NIA
	Optional	PW05	Assessment of partnership working

Sub-theme	Indicator category	Indicator code	Indicator title
Leadership and influence	Optional	PW06	Audience reach
	Optional	PW07	Level of awareness of NIA in the local community
	Optional	PW08	Number of enquiries