

Marine: how to use the lobster potting user form

Version 1.0



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Disclaimer

This document contains supporting material for the Inventory and Monitoring Toolbox, which contains DOC's biodiversity inventory and monitoring standards. It is being made available to external groups and organisations to demonstrate current departmental best practice. DOC has used its best endeavours to ensure the accuracy of the information at the date of publication. As these standards have been prepared for the use of DOC staff, other users may require authorisation or caveats may apply. Any use by members of the public is at their own risk and DOC disclaims any liability that may arise from its use. For further information, please email biodiversitymonitoring@doc.govt.nz



How to use this tool

1. Use the form

Use the form to easily enter your data. It will help you using the right format to capture all necessary data into the Excel spreadsheet.

2. Submit your data

Once you are happy with your data, go to the spreadsheet and push the 'Submit' button. Your data will be sent to a secure database. A data administrator will be notified that you submitted the data.

Note: You can only submit the data once!

3. Save your spreadsheet in DocCM

After submitting your data or when working for several days on it, save it in DocCM using the following naming structure:

MRMDATA - Lobster potting - LOCATION - yyyy_mm_dd

(Example: MRMDATA - Lobster potting - Poor Knight Islands - 2015_02_25)

4. Relax and wait

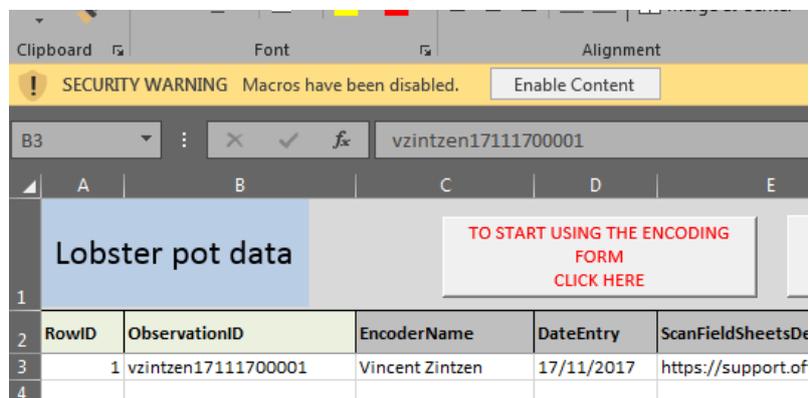
Once in the secure database, your data will be checked by a data administrator. If questions arise, you will be contacted.

Once your data have been checked, they will be incorporated into the master database with all other data collected around the country.



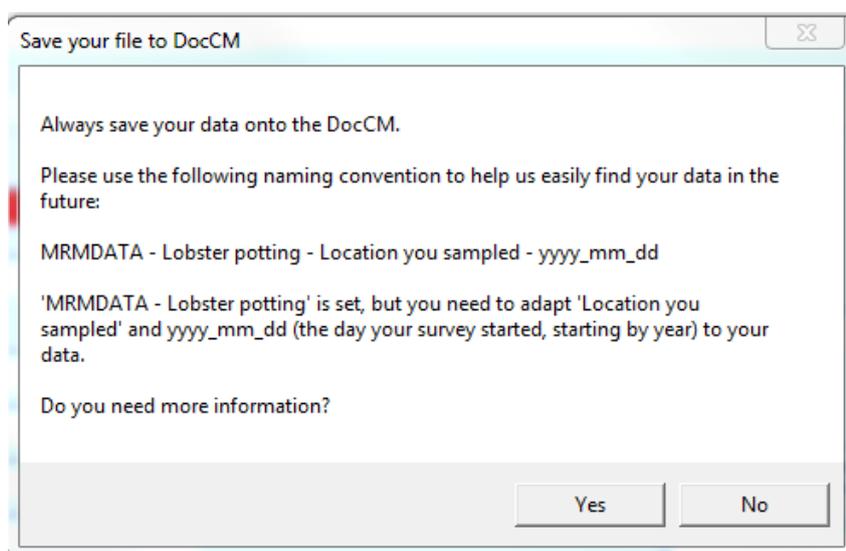
Opening the encoding form

When you first open the encoding form you will be prompted to enable macros. This allows the form to work correctly. Just click the 'Enable Content' button.



How to save data

After macros have been enabled, the form will open and you will receive the following pop-up message:



Clicking 'Yes' will open the document 'MRMDATA—file naming convention' (doccm-2606194)¹, which will provide more information on how to save the form.

Now save your document in the DocCM using the prescribed file naming convention. If you are external to DOC, this does not apply to you.

¹ <http://www.doc.govt.nz/documents/science-and-technical/inventory-monitoring/im-toolbox-marine-mrmdata-file-naming-convention.pdf>



General overview

The screenshot shows the 'Lobster potting' user form interface. It is divided into several sections: 'Encoding data', 'About the survey', and a sidebar with utility buttons. Annotations with red arrows point to specific elements:

- Your record number:** Points to the 'Record Unique Identifier' field at the top left.
- Type a rowID number to load:** Points to the 'Select RowID' button.
- Load data from a record you selected on the spreadsheet:** Points to the 'Load selected record' button.
- Load survey, site and deployment data from the last record you submitted:** Points to the 'Recall last specimen, pot, site & survey data' button.
- Navigate through the different tabs:** Points to the tabbed interface at the top, including 'Survey', 'Load GPS data', 'Site', 'Pot', 'ByCatch data', 'Upload photos', and 'Lobster results'.
- Fields to enter your data:** Points to the main form area containing fields for 'Name of encoder', 'Date of data entry', 'DocCM link(s)', 'Survey Identifier', 'Survey start date', 'Survey name', 'Survey type', 'Survey location', 'Location acronym', 'DOC Region', 'District Office', 'Key Office contact', 'Contractor', 'Contract Number', 'Link to contract', 'Survey leader name', and 'This survey is linked to the following marine protected area'.
- Clear or recall data:** Points to the 'Recall last entered data' and 'Clear this page data' buttons at the bottom.
- Find help:** Points to the 'How to use this form?' button in the sidebar.
- See what the definitions of the different fields are:** Points to the 'Field definitions' button in the sidebar.
- Get standard abbreviations for survey locations:** Points to the 'Survey locations Abbreviations standard' button in the sidebar.
- Produce a quick summary of the data you have already entered:** Points to the 'Quick stats' button in the sidebar.

Survey data

1. The first page of the form is labelled 'Survey':

The screenshot shows the 'Lobster potting' user form. At the top, there is a 'Record Unique Identifier' section with navigation arrows and buttons for 'Load selected record', 'Update this record', and 'Recall last specimen, pot, site & survey data'. Below this is a menu with options: 'Survey', 'Load GPS data', 'Site', 'Pot', 'ByCatch data', 'Upload photos', and 'Lobster results'. The main form is divided into two main sections: 'Encoding data' and 'About the survey'. The 'Encoding data' section includes fields for 'Name of encoder' (pre-filled with 'YOUR FIRST AND GIVEN NAMES'), 'Date of data entry' (pre-filled with '23/11/2017'), and several 'DocCM link(s)' fields for deployment sheets, lobster sheets, and data reports. An 'Open DocCM' button is located to the right of these fields. The 'About the survey' section includes fields for 'Survey Identifier' (pre-filled with 'POT_'), 'Survey start date', 'Survey name', 'Survey type' (pre-filled with 'Lobster potting'), 'Survey location', 'Location acronym', 'DOC Region', 'District Office', 'Key Office contact', 'Contractor', 'Contract Number', 'Link to contract', 'Survey leader name', and 'This survey is linked to the following marine protected area'. It also includes dropdown menus for 'The survey was stratified for the following variables:', 'Site selection design' (pre-filled with 'Non-random'), 'Pot deployment selection design' (pre-filled with 'Haphazard'), and 'Data rights owner' (pre-filled with 'Department of Conservation, New Zealand Government'). There is a checkbox for 'Is this survey part of a long-term monitoring programme?' and a text area for 'Survey description' with a placeholder text: 'Give an exhaustive description of the survey, including high level description of the survey design and main objectives of the survey.' At the bottom of the form are buttons for 'Recall last entered data' and 'Clear this page data'. On the right side, there is a sidebar with links for 'How to use this form?', 'Field definitions', 'Survey locations Abbreviations standard', and 'Quick stats'.

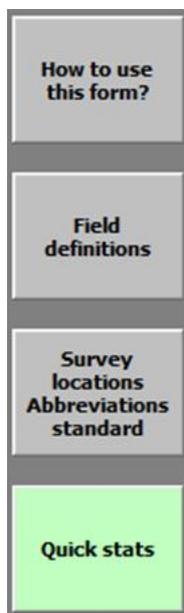
2. 'Encoding data':

In this section the person encoding the data will enter their full name and the date of data entry. In this section you can also upload the scans of the field sheets so that they are linked in with the data. You can open DocCM by clicking the 'Open DocCM' button in order to get the links—copy and paste these into the 'DocCM link(s) to the scan of the field sheet(s)' fields.



3. 'About the survey':

Use this section to enter general details about your survey. It should only be filled in once. The 'Survey Identifier' field (SurveyID) is populated automatically from values entered into 'Survey start date' and 'Survey location'.



Clicking this button opens this 'How to' document.

Clicking this button allows you to quickly see a summary of the data records you have already entered into this form.

Clicking this button opens the document 'Lobster potting—definition of data fields' (doccm-2543289)², which explains each of the fields in the form (see example below).

Clicking this button opens the document 'Marine protected area list and abbreviations' (doccm-2770061)³, which gives the official abbreviations for the different marine reserves around the country. Use these for the 'SurveyID', 'SiteID' and 'DeploymentID' fields.

| Order in form | Field in Entry Form | Tab in entry form | Field name in spreadsheet/dbase | Description | Value |
|---------------|--------------------------|-------------------|---------------------------------|---|---|
| 1 | Record Unique Identifier | Top of form | <i>RowID</i> | An incremental number starting at 1. This number is unique to the specific observation record in a survey it refers to. It is also used as primary key in the database table. | Long integer, 12 digits. System generated in the data |
| 2 | NA - Hidden field | NA - Hidden field | <i>ObservationID</i> | A unique code identifier for the observation. This code is unique to the specific record in a survey it refers to. It is also unique for the encoder and data entry date, counting records encoded by a specific user on a specific date. Made of '<LOBSTER_POTTING_> <username> <entry date> <'99999'> <username> is <first letter from EncoderName> <all letters after the first blank in EncoderName> <entry date> is <DateEntry converted to YYYYMMDD> Example: 'LOBSTER_POTTING_gkessel2016070500001' <encoder system user name> = 'gkessel' <entry date> = '20160705' <entry date record number> = '00001' | alphanumeric of maximum length 79: 16 for LOBSTER_POTTING_ maximum of 50 characters for user name, 8 for entry date, 5 for daily entry date record number |

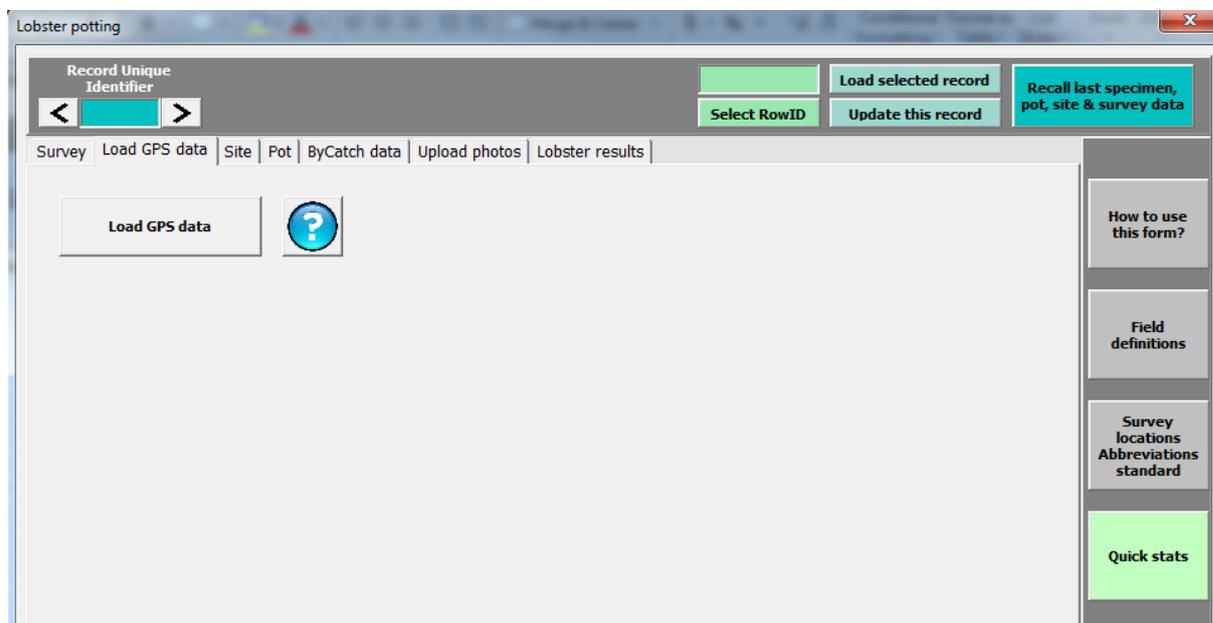
² <http://www.doc.govt.nz/documents/science-and-technical/inventory-monitoring/im-toolbox-marine-lobster-potting-definition-of-data-fields.xlsx>

³ <http://www.doc.govt.nz/documents/science-and-technical/inventory-monitoring/im-toolbox-marine-marine-protected-area-list-and-abbreviations.xlsx>



Load GPS

1. The second page is labelled 'Load GPS data':



2. If you have used a handheld GPS to record the positions of your pot deployments, this will help you load your waypoints into the spreadsheet. Click  for instructions.



Site data

1. The third page is labelled 'Site':

The screenshot shows the 'Lobster potting' application window. At the top, there's a 'Record Unique Identifier' field with navigation arrows. To the right are buttons for 'Load selected record', 'Recall last specimen, pot, site & survey data', 'Select RowID', and 'Update this record'. Below this is a tabbed interface with 'Survey', 'Load GPS data', 'Site', 'Pot', 'ByCatch data', 'Upload photos', and 'Lobster results'. The 'Site' tab is active, showing the 'Site data' section. This section contains a 'Monitoring area' dropdown menu, a blue button 'Help with locating the site your record belongs to', a 'Habitat description' text input field, and a checkbox 'Did you collect additional habitat data for this site?'. Below these are input fields for 'NZHMCS Abiotic' and 'NZHMCS Biotic', and a 'Link to NZHMCS doc' button. At the bottom of the form are 'Recall last Site data' and 'Clear site data' buttons. On the right side, there's a vertical sidebar with links: 'How to use this form?', 'Field definitions', 'Survey locations Abbreviations standard', and 'Quick stats'. At the bottom right, there's a photograph of a lobster.

2. You will have visited different sites within your survey. Enter here the data for your first site, before proceeding to the data related to your pot deployment. You will have to come back to this tab and adapt the values when you are entering data for another site.
3. First choose a monitoring area from the list, then a site location, then a site name (or site code).
4. Once you select a site name/site code, the information about that site should automatically display.



- The 'Site Identifier' is a unique name for your site made of 3 letters + '_' + 3 digits (e.g. PKI_002).
- 'Site Identifier', 'Site Code', 'Site Name' and 'Location' are all linked.
- Enter habitat description of your site if required.

Pot data

- The fourth page is labelled 'Pot':

Lobster potting

Record Unique Identifier:

Survey | Load GPS data | Site | **Pot** | ByCatch data | Upload photos | Lobster results

Information on your pot deployment

Pot Identifier:

Replicate # within site: Lunar phase: Vessel:

Date of deployment: Days since last New Moon: Skipper:

Date of retrieval:

Depth at deployment (m): Depth collection method: Has depth been tide corrected?

Depth at retrieval (m): Depth strata: e.g., 10-20m

Site coordinates (WGS84)

Accuracy of coordinates (m):

Latitude: (dd.ddd)

Longitude: (dd.ddd)

Time of sampling (24h format)

In: (hh:mm) Out: (hh:mm)

OR

Soak time (hours):

Weather

Yesterday's weather

Average wind speed (knots): Swell direction:

Wind direction: Swell height (m):

Today's weather

Average wind speed (knots): Swell direction:

Wind direction: Swell height (m):

Pot design

Pot type: Bait species: Bait amount (g):

Pot dimensions

Length: (mm) Width: (mm) Height: (mm)

Pot escape gap size

Length: (mm) Width: (mm) Pot escape gap #:

Pot mesh size

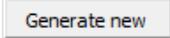
Length: (mm)

Width: (mm)

Additional notes on pot:

How to use this form? | Field definitions | Survey locations Abbreviations standard | Quick stats

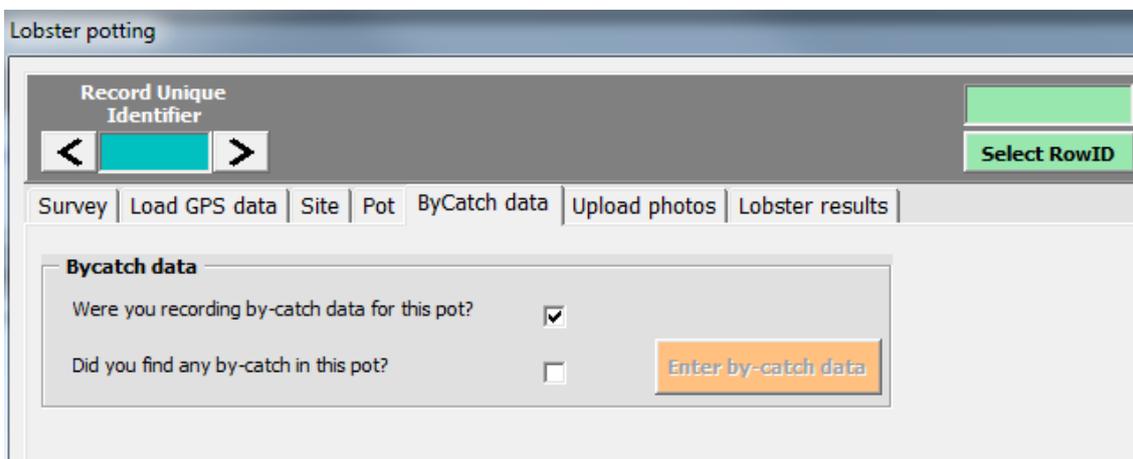
- You will have deployed at least one and probably several pots within a site. Enter here the data for your first pot. You will have to come back to this tab and adapt the values when you are entering data for a new pot (i.e. after having encoded all the data related to this specific pot).
- The 'Pot Identifier' is a unique identifier for one specific pot. It is made of the Survey Identifier (SurveyID) field + '_' + 4 digits (e.g. POT_20170512_ROM_0001).

Pressing the  button will create the next unique pot identifier automatically for you.

- The  button will ease your work for entering latitude and longitude information for your pot. This function only works if you have imported your GPS data using the 'Load GPS data' page.

Bycatch data

- The fifth page is labelled 'ByCatch data':



The screenshot shows the 'Lobster potting' application interface. At the top, there is a 'Record Unique Identifier' section with a text input field and a 'Select RowID' button. Below this is a navigation menu with tabs for 'Survey', 'Load GPS data', 'Site', 'Pot', 'ByCatch data', 'Upload photos', and 'Lobster results'. The 'ByCatch data' tab is active. The form contains two checkboxes: 'Were you recording by-catch data for this pot?' (checked) and 'Did you find any by-catch in this pot?' (unchecked). An orange 'Enter by-catch data' button is located to the right of the second checkbox.

- If you have collected bycatch data from your pot, enter these data here.
- Tick the checkbox if you have collected bycatch data. If you were collecting bycatch data for this survey but this particular pot did not have any bycatch, you should still tick the checkbox called 'Were you recording by-catch data for this pot?' (it is ticked by default). This allows you to keep track of samples that had no bycatch.
- If bycatch species were actually present in your pot, then tick 'Did you find any by-catch in this pot?' and then click  to enter information about them.

5. The bycatch form:

By catch data

Bycatch data refers to the following pot (edit in pot data form)

Pot Identifier: XXXXXXXXXX

Date entry: Encoder: Site Identifier:

Date of deployment: Location: Site name:

Date of retrieval: Site code:

Site coordinates (WGS84)

Latitude: (dd.dxxxxx)

Longitude: (dd.dxxxxx)

Time of sampling (24h format)

In: (hh:mm)

Out: (hh:mm)

Depth at deployment (m): Depth at retrieval (m):

| | Species | Count | Size (cm) | Specimen(s) dead? | If known, reason for death |
|-------------|----------------------|----------------------|----------------------|--------------------------|----------------------------|
| Bycatch 1: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | <input type="text"/> |
| Bycatch 2: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | <input type="text"/> |
| Bycatch 3: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | <input type="text"/> |
| Bycatch 4: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | <input type="text"/> |
| Bycatch 5: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | <input type="text"/> |
| Bycatch 6: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | <input type="text"/> |
| Bycatch 7: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | <input type="text"/> |
| Bycatch 8: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | <input type="text"/> |
| Bycatch 9: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | <input type="text"/> |
| Bycatch 10: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | <input type="text"/> |
| Bycatch 11: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | <input type="text"/> |
| Bycatch 12: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | <input type="text"/> |

Notes on bycatch:

SUBMIT BYCATCH DATA

Return to pot data

Recall last species

Check your species names against WORMS online database

Reset species values

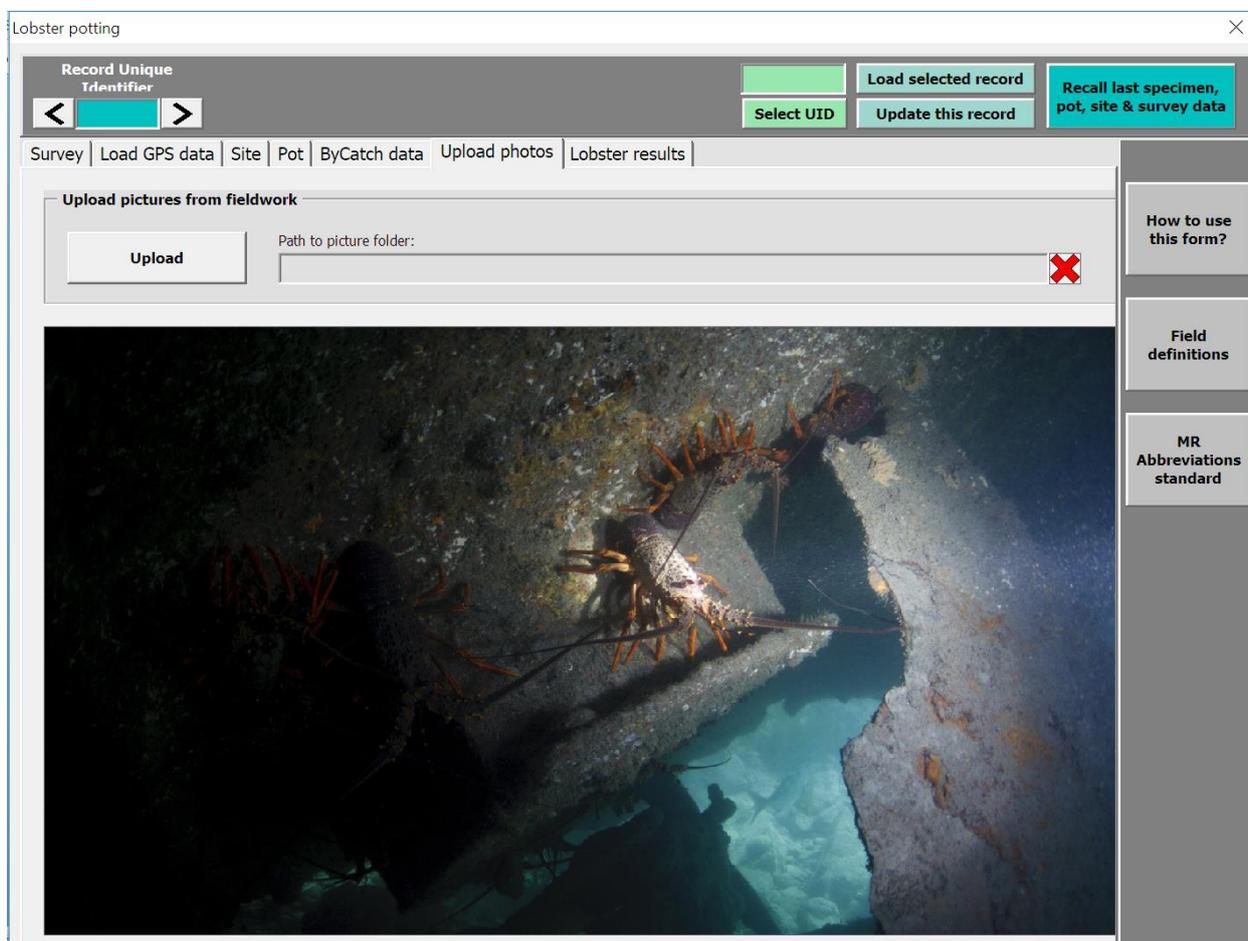
- The top section of the bycatch form is automatically populated from the 'Survey', 'Site' and 'Pot' sections of the data you have currently entered.
- Enter the scientific name for the bycatch species, as well as counts, size and reason for death if appropriate. Where there are individuals of different sizes from the same species, enter them on separate lines.
- You can check the validity of the scientific name against the World Register of Marine Species (WoRMS).⁴

⁴ <http://www.marinespecies.org/aphia.php?p=search>

9. Click **SUBMIT BYCATCH DATA** to submit these data to the spreadsheet.

Upload photos

1. The sixth page is labelled 'Upload photos':



The screenshot displays the 'Lobster potting' application window. At the top, there is a 'Record Unique Identifier' field with navigation arrows and a 'SUBMIT BYCATCH DATA' button. Below this are buttons for 'Load selected record', 'Select UID', 'Update this record', and 'Recall last specimen, pot, site & survey data'. A navigation bar includes tabs for 'Survey', 'Load GPS data', 'Site', 'Pot', 'ByCatch data', 'Upload photos', and 'Lobster results'. The 'Upload photos' tab is active, showing an 'Upload pictures from fieldwork' section with an 'Upload' button and a text input field for the 'Path to picture folder:'. Below the input field is a large image of a lobster in a pot. On the right side, there are three menu items: 'How to use this form?', 'Field definitions', and 'MR Abbreviations standard'.

2. You can upload as many photos as you want from your survey using the upload button. A path to the server where they are stored will be automatically populated.



Lobster results

1. The seventh page is labelled 'Lobster results':

2. Within each of your pots, you will have normally collected a series of lobster specimens.
3. If you did not collect any lobsters in this pot, select the check box **Is your pot empty (zero lobsters)?**. This will send a line of data to the spreadsheet to keep a record of the fact that this pot was deployed but that no lobsters were collected.



4. If you have only counted and/or sexed the lobsters in this pot, you can check

Have you only counted/sexed specimens in this pot?

. This will open a new form that will assist you with entering these data quickly:

5. If you have sexed and measured each lobster, proceed with entering the data for the first specimen.

Submit data for this specimen and reset

When done, click . The data are then sent in to the spreadsheet.

6. You can now enter data for the second lobster specimen in this pot, or change the 'Survey', 'Site' or 'Pot' data if required.

Appendix A

The following Department of Conservation documents are referred to in this guideline:

| | |
|---------------|--|
| doccm-2543289 | Lobster potting—definition of data fields |
| doccm-2606194 | MRDATA—file naming convention |
| doccm-2770061 | Marine protected area list and abbreviations |

Other related documents

| | |
|---------------|--|
| doccm-2565062 | Lobster potting—data management dashboard |
| doccm-2543532 | Lobster potting—data spreadsheet and form |
| doccm-2787556 | Lobster potting field sheet 1—pot deployments |
| doccm-2787557 | Lobster potting field sheet 2—lobster measurements |
| doccm-1547446 | Marine: potting for lobster populations |

