

4

Manage My Team - Locations

4.1 Overview

When you click on the 'Locations' option within the 'Manage My Team' section, you will be taken to a list of all the sites that you have LO access to (see Fig. 8).

Locations

From this page you can view all the locations within your region(s) and the site details including recent observations.

New users can be assigned to your locations and existing counters can have their site permission downgraded to view only permission, while users with view permission can be upgraded to counters, which will allow them to enter data for the location.

If you have identified a potential new site for WeBS, a request can be sent to the National Organiser: [Request New Site](#)

[Collapse All](#) [+ Expand All](#)

- ✓ Central Scotland (excl. Forth Estuary)
 - > ● Aberdona East Pond
 - > ● Aberdona West Pond
 - > ● Airthrey Loch
 - > ● Allan Water - Ashfield to Cambushinnie
 - > ● Allan Water - Dunblane to Ashfield
 - > Allan Water - Dunblane to Wharry Burn
 - > ● Allan Water and Netherton Marsh
 - > Allan Water at Bridge of Allan
 - > Allan Water at Netherton
 - > ● Alva Floods
 - > ● Arnprior
 - ✓ Ashfield Pools
 - Loc Label:** 84368
 - Grid Reference:** NN786035
 - Site type:** Inland
 - Boundary Accuracy:** No data available
 - Protocol:** WeBS Core Count
 - Active:** Yes

[Yearly site summary](#)

[View location map](#)

[Edit site boundary](#)

- > [Recent Counts](#)
- > [Counters](#)

WeBS Options

Locations
Counters
Count Summary

Figure 1 Locations landing page.

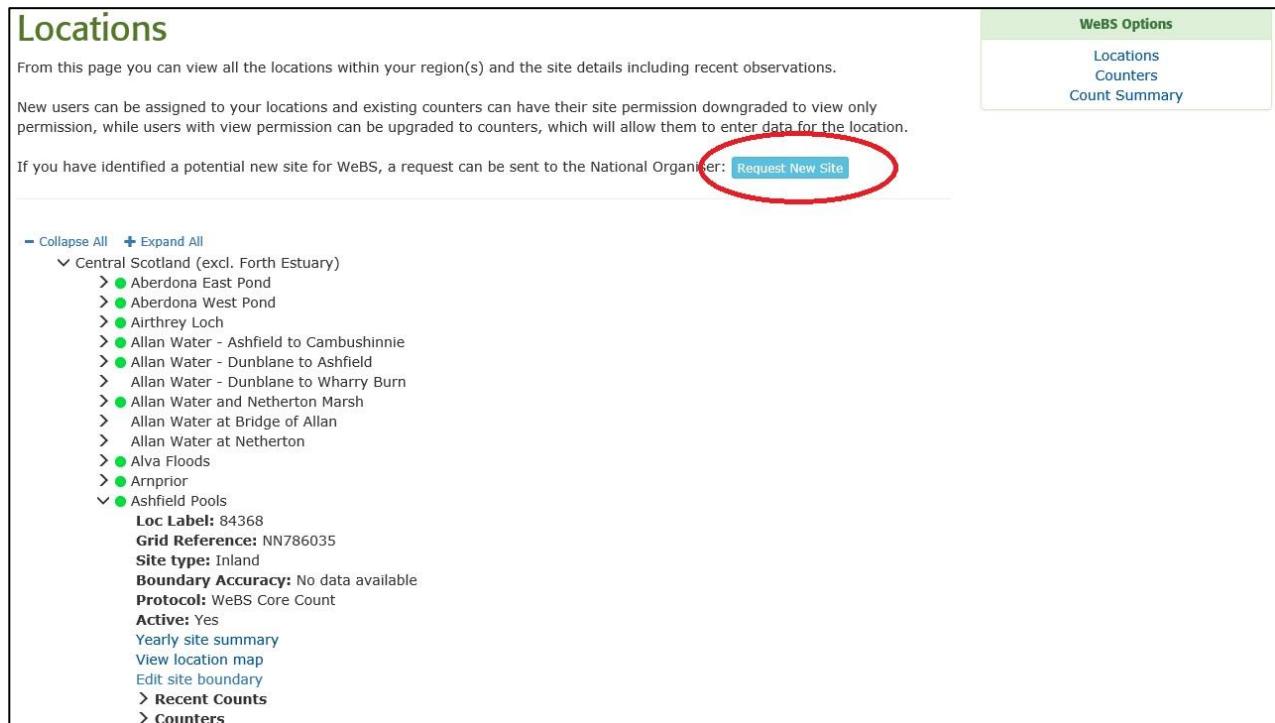
Sites with an allocated counter and are therefore 'active' have a **green spot**. Inactive sites that have potential issues (e.g. landowner has denied access; site is on MOD land etc.) have a **black spot**. Clicking on the **+ symbol** will open the site information panel and offer you more options (see page 22).

From this page you can also:

- **request a new site be set up** (see page 20);
- **view the site details** (see page 21);
- **assign; allocate and de-allocate counters to sites** (see pages 23 to 26);
- **downgrade counter access to view only** (see page 26);
- **view and edit the site boundary map** (see page 28).

4.2 Request a new site

At the top of the Locations page you will see a blue 'Request New Site' button (see Fig. 9).

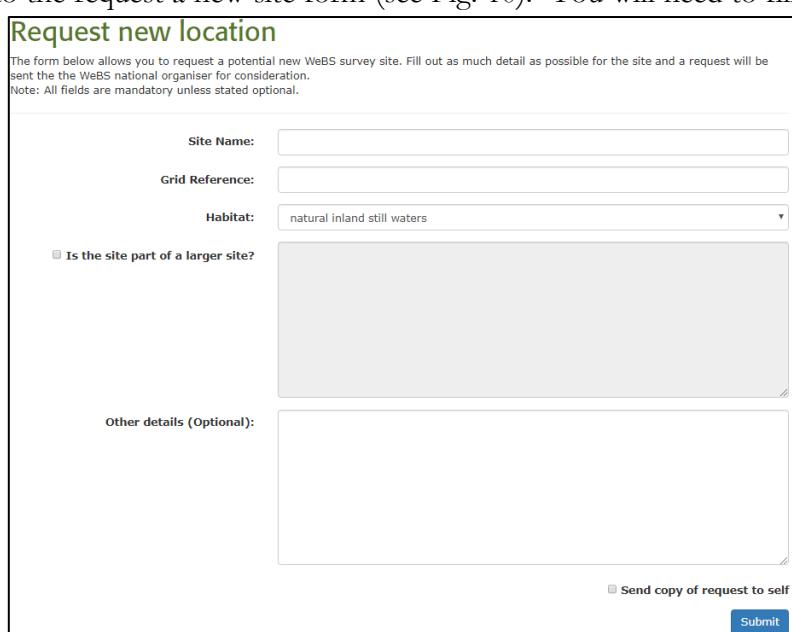


The screenshot shows the 'Locations' page of the WeBS software. At the top right is a 'WeBS Options' menu with 'Locations', 'Counters', and 'Count Summary' options. The main content area displays a list of sites under 'Central Scotland (excl. Forth Estuary)'. Each site entry includes a green circular icon and a list of details: Loc Label, Grid Reference, Site type, Boundary Accuracy, Protocol, Active status, Yearly site summary, View location map, Edit site boundary, Recent Counts, and Counters. A specific site entry for 'Ashfield Pools' is highlighted with a red oval around the 'Request New Site' button at the bottom right of its detail box.

Figure 2 Request a new site button

Clicking on this button will take you to the request a new site form (see Fig. 10). You will need to fill in the boxes with the relevant details:

- **Site Name** – the site name should be no more than 60 characters. Preferably, this should be the name of the site shown on a recent map but can be a local name for the site and can include previous names.
- **Grid Reference** – please enter a central grid reference or, where the site is a river or stretch of coast, please add a start and end grid reference.
- **Habitat** – please choose the most relevant description from



The screenshot shows the 'Request new location' form. At the top, it says 'The form below allows you to request a potential new WeBS survey site. Fill out as much detail as possible for the site and a request will be sent to the WeBS national organiser for consideration. Note: All fields are mandatory unless stated optional.' The form contains several input fields: 'Site Name' (text input), 'Grid Reference' (text input), 'Habitat' (dropdown menu set to 'natural inland still waters'), and a checkbox 'Is the site part of a larger site?' followed by a large text area for notes. Below these are sections for 'Other details (Optional)' (text area) and 'Send copy of request to self' (checkbox). At the bottom right is a 'Submit' button.

Figure 3 Request new location form.

the drop-down list. If an inland site will be affected by the tide (e.g. a tidal river) please mention this in the ‘other details’ section.

- **Is the site part of a larger site?** – if you are splitting an existing site/sector to create a new count area please tick the box and add details of the site/sector that is being split (e.g. sector name and Loc Label number – see page 22).
- **Other Details (optional)** – please enter any other information that you feel is relevant. If you include the username of the counter who will be covering this area, we will allocate it to them as the site is created.
- **Send copy of request to self** – by ticking this box a copy of the notification email will be sent to you.

Once you are happy with the information you have entered please click on the ‘Submit’ button at the bottom of the page. A pop-up box will appear to let you know that your request has been sent. A notification email will be sent to the WeBS Office, if you have ticked the ‘send copy of request to self’ a copy of that email will be sent to you.

We will notify you when your site has been created and added to your online site list.

4.3 Site/sector details

In the Locations page, you can open the details for each site/sector by clicking on the + symbol next to the name (see Fig. 11).

The screenshot shows a list of sites. 'Gardrum Moss' is expanded, showing its details. The details include:
Loc Label: 84215
Grid Reference: NN642060
Site type: Inland
Boundary Accuracy: Known to be fairly accurate
Protocol: WeBS Core Count
Active: No
Parent Site: Gart Complex (84219)
Ancestor Site: Gart Complex (84219)
Yearly site summary
View location map
Edit site boundary
Recent Counts
Counters
Assign new users

At the bottom, there are buttons for 'Volunteer, Mr A (AVOLUNTEER) INPUT Downgrade' and 'Austin, Dr Graham (GAUSTIN) VIEW Upgrade'. To the right, there is a 'Allocated Counter?' section with 'Yes' and 'No' buttons, both of which are currently unselected.

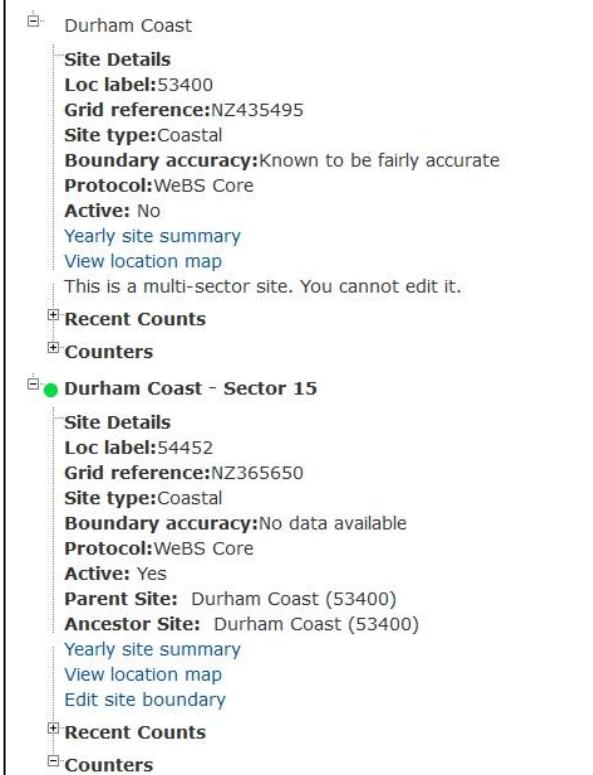
Figure 4 Site details are revealed after clicking on the + symbol next to the site/sector name.

The top half of the list includes the site/sector code (loc label); the central grid reference; site type (whether it is in inland or coastal site); and whether or not the boundary is accurate, estimated or doesn’t exist (boundary accuracy); whether it is a Core or Low Tide site (protocol). The Active flag indicates whether or not a site has an ‘allocated’ counter (for more information see page 24).

Where a sector exists as part of a multi-level or complex site (where the original site has been split into smaller sectors), you will also see the immediate parent of this site and its ultimate ancestor (see **Appendix 4** for more information on site hierarchies). We are hoping this will help with counter allocation and make it easier to follow how sites/sectors fit together. If you would like to receive a site hierarchy tree for a specific group of sites (e.g. Durham Coast) please contact the WeBS Office.

Below this, clicking on the ‘**Yearly site summary**’ will show you a table with the peak counts (taken from the primary counts) for each WeBS year (see Fig 5). Clicking on the year will show you the monthly Primary count data (see Fig 6).

Click on the ‘View location map’ to see the site/sector location on a map and a boundary outline if available. For multi-level (complex) sites boundary outlines should only exist at the lowest possible level. When viewing the location map for the top-level sites, the boundary outlines from the bottom-level sectors will be visible but unfortunately this does not currently work for mid-level sectors. We are hoping to change this in future online developments.



The screenshot shows a hierarchical site structure. The main site is 'Durham Coast', which contains a sector named 'Durham Coast - Sector 15'. Each site/sector has a 'Site Details' section with various attributes like Loc label, Grid reference, Site type, Boundary accuracy, and Protocol. Below the main site, there are 'Recent Counts' and 'Counters' sections. The sector 'Durham Coast - Sector 15' also has these sections. For the sector, the 'Edit site boundary' option is listed under the 'Counters' section, while for the main site, it is listed under the 'Site Details' section. A note states: 'This is a multi-sector site. You cannot edit it.'

Stand-alone sites and bottom-level sectors (when part of a multi-level site) have the option to edit the site boundary (see page 28). If the site you have selected is not a bottom-level sector you will not have the ‘Edit site boundary’ option (see Fig. 12).

Figure 5 Bottom-level sector boundary maps are editable.

The ‘Recent Counts’ option allows you to see counts submitted for the current calendar year. You can see who submitted the data, send a query to the counter (if they have an email address on file) and accept the count if you are happy with the data (see page 44, Reviewing data submissions).

Clicking on the + symbol next to the ‘Counters’ option opens additional information about who has access to each site/sector. From here you can assign new counters (see below); up- and downgrade people’s access and set the ‘allocated’ counter(s).



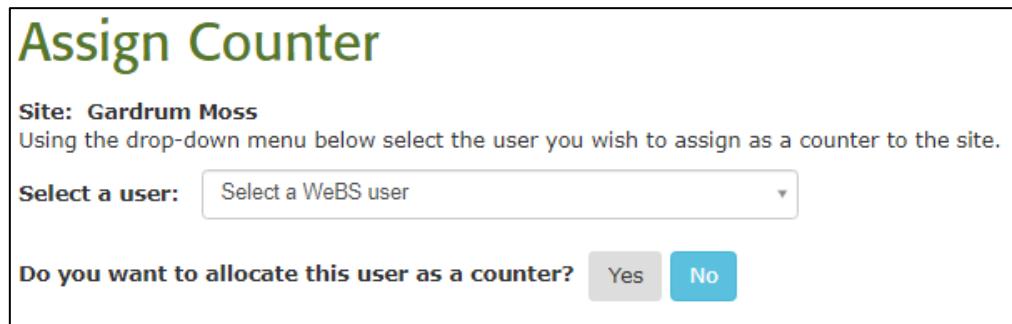
NOTE – there may be several people with VIEW only access whom you may not recognise. These may be ex-counters, people from WeBS Partner Organisations or they could be County Bird Report Editors/Recorders. There is usually nothing to worry about and they do not need to be reported unless they have INPUT rights and you do not recognise them.

4.4 Assigning counters to sites

When a volunteer offers to start counting a site for WeBS they will need to be registered for WeBS with a BTO online username (instructions on registering can be found in the section 3 'Guide to WeBS Online' of the counter handbook which is available online. Also see **Appendix 6** Troubleshooting and FAQs). You will need their online username in order to assign a site to them.

You will need to visit the '**Manage My Team**' area; select '**Locations**' from the WeBS options; find the relevant site; open the site details and then the '**Counters**' option (see Fig. 11).

Clicking on the '**Assign new users**' option will take you to the Assign Counter page (see Fig. 13).



Assign Counter

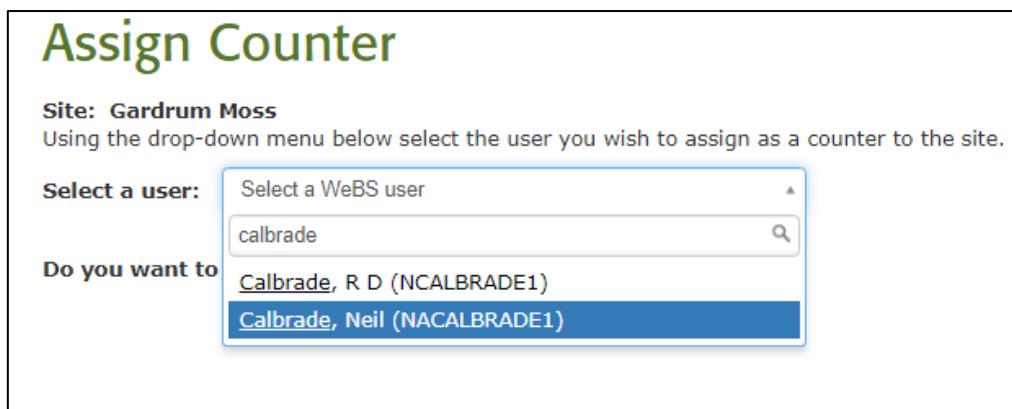
Site: Gardrum Moss
Using the drop-down menu below select the user you wish to assign as a counter to the site.

Select a user: Select a WeBS user

Do you want to allocate this user as a counter? Yes No

Figure 6 Assign Counter form.

You will be presented with a drop-down box with all WeBS counters listed. The list is alphabetical by surname and is limited to 'A'. To find your counter, click in the box and start typing their surname or username and the relevant options will be presented to you (see Fig. 14).



Assign Counter

Site: Gardrum Moss
Using the drop-down menu below select the user you wish to assign as a counter to the site.

Select a user: Select a WeBS user

Do you want to

calbrade	🔍
<u>Calbrade, R D (NCALBRADE1)</u>	
Calbrade, Neil (NACALBRADE1)	

Figure 7 Selecting your counter.

Select your counter by clicking on their name in the results list.

NOTE – It is imperative that you know the correct username for your counter, EVERYONE who has linked their online username to WeBS is included in this list, as you can see from the example in Figure 14, it is easy to select the wrong person. If your counter's username does not appear in this list it is likely that they have not yet linked their username to WeBS (please see Appendix 6 Troubleshooting and FAQs).

4.5 Allocating Counters

Now that you have selected your counter you need to decide whether or not they should be an ‘Allocated’ counter.

The ‘Allocated’ counters are the permanent Core Counters for a site. You can have more than one allocated counter when a team is covering a site together. Adding an ‘Allocated’ counter to a site will automatically mark that site as ‘**Active = yes**’ in the site details and ‘**counted/not-vacant**’ on the vacant sites page of the website.

Assign Counter

Site: Gardrum Moss
Using the drop-down menu below select the user you wish to assign as a counter to the site.

Select a user: Calbrade, Neil (NACALBRADE1)

Do you want to allocate this user as a counter? Yes No

Assign new counters

Figure 8 Making a counter the ‘Allocated’ counter.

To allocate the counter, select the ‘yes’ button as in Figure 15 (the default selection is ‘no’).

If you have a stand-in counter or someone who wishes to submit roost counts or just occasional counts but will not be the permanent Core Counter then do not make them the ‘allocated’ counter. A site without any ‘allocated’ counters will be marked as ‘**Active = no**’ in the site details and ‘**not counted/vacant**’ on the vacant sites page.

As you can see from Figure 16, Neil Calbrade is now listed as the Allocated counter and the site has been marked as ‘Active’.

Garbh Uisage - Kilmahog to Loch Lubnaig

Gardrum Moss

Loc Label: 84517
Grid Reference: NS881754
Site type: Inland
Boundary Accuracy: Known to be fairly accurate
Protocol: WeBS Core Count
Active: Yes
Yearly site summary
View location map
Edit site boundary
Recent Counts
Counters

Assign new users

Calbrade, Mr Neil (NACALBRADE1) INPUT Downgrade
Austin, Dr Graham (GAUSTIN) VIEW Upgrade

Allocated Counter? Yes No

Gart Loch

Figure 9 Allocated counters for a site.

If you are the permanent Core Counter for the site you simply need to select ‘yes’ next to your name in the Site Details/Counters section to mark you as the ‘allocated’ counter. You can do the same for anyone who already has at least inputting rights to a site. In the example above, Mr A Volunteer is the LO but not an ‘allocated’ counter.

From this panel, you can change a counter’s access from VIEW only rights to INPUT rights by clicking the **upgrade** button next to their name (see WeBS Counter Organiser in Fig. 16). When **upgrading** a counter you will be asked if you want to mark them as the allocated counter – if you do, please click on ‘ok’: this will mark the site as ‘**Active = yes**’ and ‘**counted/not-vacant**’. If

not, please click on 'cancel': the counter will now have inputting rights but the site's active status will remain as it was.

4.6 Allocating counters to multi-level sites

Allocated counters are the permanent Core Counters for a site/sector. When allocating counters to sectors that are part of a multi-level (or complex) site structure (where a site has been split into at least two or more smaller sectors) it is preferable for them to be allocated to the **lowest-level possible**. A site or sector that has an allocated counter is listed as 'Active = yes' and will appear as 'counted/not-vacant' on the vacant sites page.

Figure 17 below is an example of how a site may have been split over the years to form a multi-level site structure; the lowest levels are coloured blue. Only the lowest level sectors (with a boundary outline) will be visible on the Vacant Sites webpage (see [Appendix 5](#) for more information).

Having counters allocated to the wrong level, or at multiple levels, can have huge implications on the data and how those data are presented in our Reports.

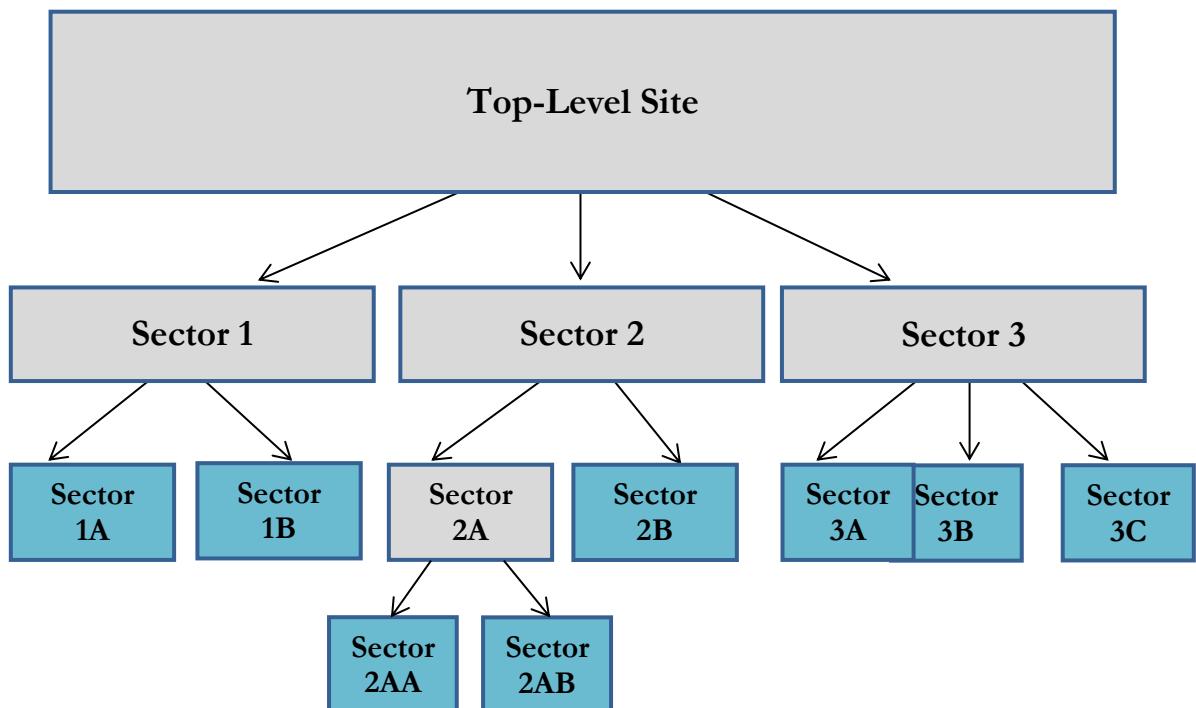


Figure 10 Example of a multi-level site with the lowest-level sectors coloured blue.

To ensure that counters are allocated to only one level within the site structure we have set up alerts to warn you if **you attempt to allocate a counter to a higher-level sector when lower-level sectors are available**. For Example, if Sectors 2AA, 2AB and Sector 2B are all vacant and you attempt to allocate a counter to Sector 2 you will see a warning box which will list these lower-level sectors. You will be given the option to cancel or continue with your allocation request.

You will also receive a warning message if **you attempt to allocate a counter to a higher-level sector when someone is already the allocated counter at a lower-level**. For example, if

sector 2AB has an allocated counter and you try to add an allocated a counter to Sector 2A, you will see a warning box which will tell you which lower-level sectors are already 'Active' (have an allocated counter). You will not be able to continue with the allocation at this level. If having an allocated counter for Sector 2AB is correct then you will only be able to allocate a counter to Sector 2AA. If, however, you have received a warning message but the allocated counter for Sector 2AB has retired etc., you will need to de-allocate them from Sector 2AB (see page 25) before you can add an allocated counter to Sector 2A.

If you have a volunteer who is submitting ONLY roost or casual (incomplete) counts for a higher-level sector then you can still add them as a counter with inputting rights but they should NOT be submitting Core Counts for that higher-level sector and therefore cannot be the 'Allocated' counter.

If you have any queries about whether to make someone the 'allocated' counter, please contact the WeBS office (webs@bto.org) for clarification.

We have tried to make it easier to identify sectors that are part of a multi-level site structure by adding the immediate parent sector and the ancestor (the original or whole site) names to the site details (see page 24 and [Appendix 4](#)). If you would like a copy of the site trees for your region, please contact the WeBS Office (webs@bto.org).

4.7 Un-assigning counters

When volunteers change sites or stop counting for WeBS altogether, you will need to change their access rights to the site(s) they are leaving.

You will need to visit the '**Manage My Team**' area; select '**Locations**' from the WeBS options; open the site details and the '**counters**' option (see Fig. 11).

You can change a counter's access from INPUT rights to VIEW only rights by clicking the **downgrade** button next to their name (see Neil Calbrade in Fig. 16). **Downgrading** an 'allocated' counter will automatically remove them as the allocated counter. If they are the last allocated counter for that site, the site will be marked as '**Active = no**' and '**not-counted/vacant**'.

If you have a permanent 'allocated' counter who has told you of their intention to retire and you would like to advertise for new counters before their official end date, you can **de-allocate** them by selecting the 'no' button next to their name (see Neil Calbrade in Fig. 16). If there are no other 'allocated' counters for that site, it will be listed as '**Active = no**' in the site details and '**not counted/vacant**' on the vacant sites page. The retiring counter will retain the INPUT rights until they fully step down and can then be downgraded to VIEW rights.



***NOTE** – you cannot fully remove counters from a site. It is WeBS policy to allow retired counters to continue to have VIEW rights to the sites they have submitted data for. If you wish to remove a counter completely, please contact the WeBS Office.*

