

<u>Urban Forestry South Expo</u> (UFS)

If you are a new user of Urban Forestry South *Expo*, you should read the other on-line user guides:

The BRCC Introduction to Urban Forestry South Expo

http://www.urbanforestrysouth.org/Resources/Library/Citation.2005-02-24.5211/file_name/

A[n Introductory] Guide to UFS

http://www.urbanforestrysouth.org/Resources/Library/TTResource.2005-01-12.2714/file/

Navigating, Browsing & Searching at Urban Forestry South Expo

http://www.urbanforestrysouth.org/Resources/Library/copy_of_Citation.2005-02-24.5211/file_name/

Creating Collections at Urban Forestry South Expo

http://www.urbanforestrysouth.org/Resources/Library/Citation.2005-04-08.0016/file_name/

The List of Topics and Sub-Topics

http://www.urbanforestrysouth.org/topics_subtopics.pdf

A Quick Search with the text "UFS Guides" (include the quotes) will list all of the current instructional guides.

Participation in Urban Forestry South Expo

In order to create and submit content for publication onto UFS, users must first "join" the website by providing a valid e-mail address. Review instructions for joining UFS in one of the two introductory guides listed above.

Login

Start by logging in to UFS by using either the **Login** link under UFS Tools or from the **User Actions** area:



Image 1: UFS Tools and the User Actions areas: Login

If you have forgotten your password, it can be retrieved from the **Login** screen:

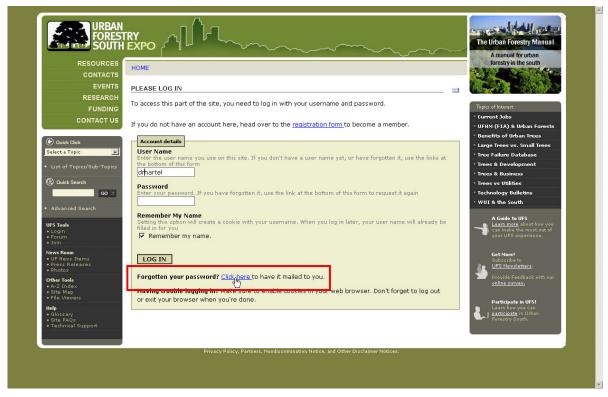


Image 2: Forgotten Password!

Your password will be e-mailed to you.

Whenever you login to UFS, a workspace (accessible from the **UFS Tools** menu) will be available for creating and managing information that you would like to submit to UFS:

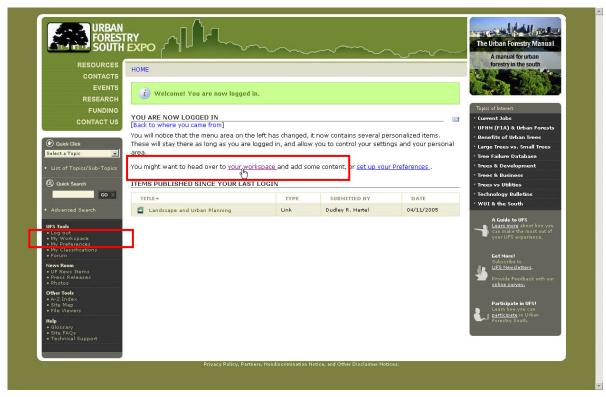
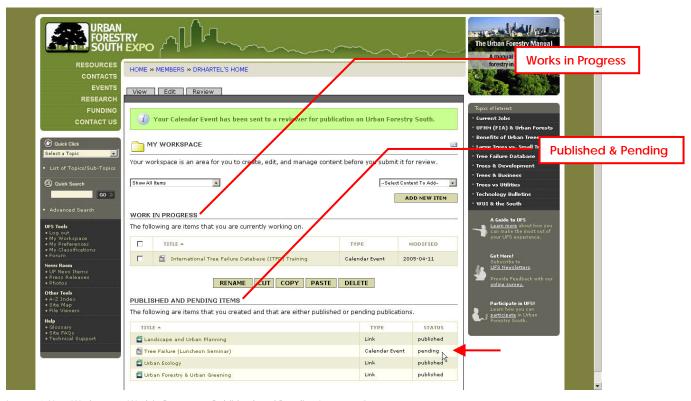


Image 3: Initial Screen after Login: Finding your Workspace

You can access your workspace at anytime from the **UFS Tools** menu in the left panel, or by 'clicking' on the link from this page after logging in.

Workspace

Your workspace is divided into two sections.



 $Image\ 4:\ Your\ Workspace:\ Work\ in\ Progress\ \&\ Published\ and\ Pending\ Items\ sections$

Your workspace will contain all of the content that you have created, but have not submitted for "publication" under the section entitled **Work In Progress**.

Once you submit content to a reviewer (instructions to follow in this guide), the content will appear under the section entitled **Published and Pending Items**. The **red** arrow indicates content submitted that has not been reviewed and 'published'.

Creating Content for UFS

The right hand drop-down menu in your workspace will allow you to select the type of content you wish to add to UFS.



Image 5: Your Workspace: Add an Item (Content)

One of the easiest types of content to add to UFS is a link to a website.

Assume you have located another website that has relevance to urban forestry and/or arboriculture.

By adding this link to UFS, you can make it easier for others to locate it by describing the website, and assigning sub-topics and keywords.

The title, description and keywords are searchable, and this capability makes UFS a powerful tool for managers, and others interested in urban forestry.

Select Link from he dropdown ad then 'click' on the Add New Item button (see Image 6).

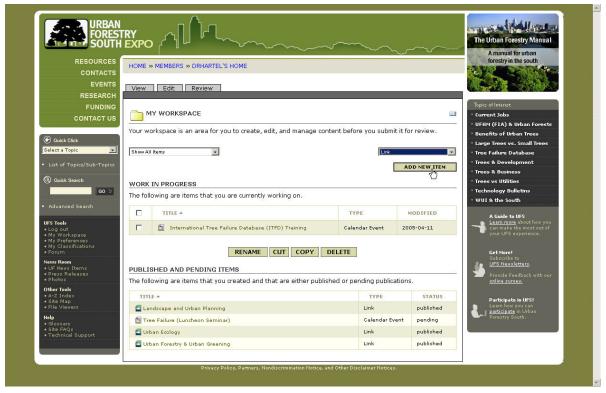


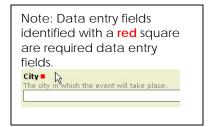
Image 6: Your Workspace: Add an Internet Link

A link Edit screen will appear.



Image 7: Link Edit Screen

Begin by entering information into fields marked with a ■; these must be entered before the first Save.



When you have entered the title field, 'click' on the **Check for Duplicates** button to determine if the title (and possibly content) you are adding was previously entered by another user.

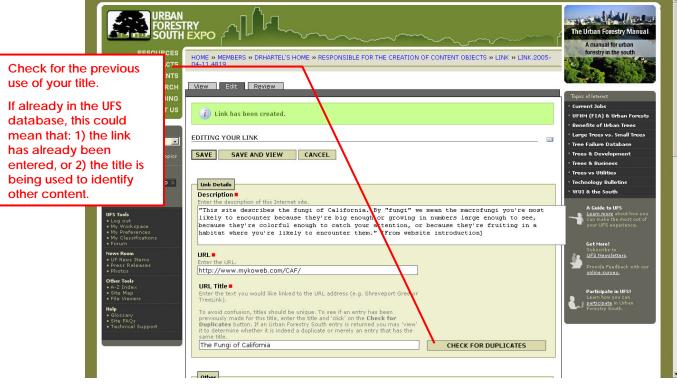


Image 8: Required Fields Completed

A popup window will indicate the results of the duplicate check. Content with the same title will be displayed in the window. Check duplicates by 'clicking' on the title(s) displayed in the window to determine whether your link has already been entered, or if the title is being used for

other related content. If the title is being used by other content, you should alter the title to avoid confusion. For example, if "The Fungi of California" were being used to describe some other content (e.g. a book), then I could change this title to read "The Fungi of California (Website)".



Once you have entered the required fields (see Image 8), 'click' on either the **Save** or **Save and View** buttons (see Image 9).

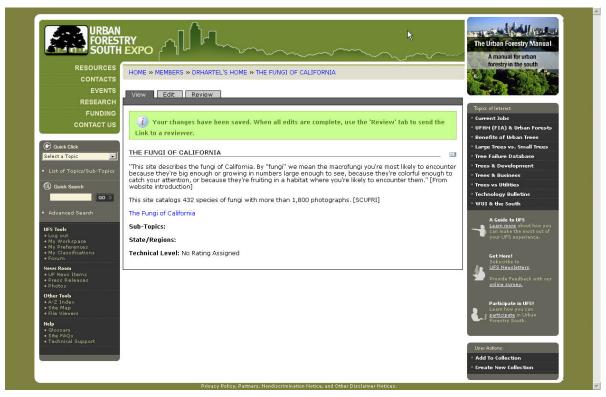


Image 9: Save and View from the Link Edit Screen

Notice that Sub-Topics, State/Regions, and Technical Level are incomplete or have a default value.

The title has become the "linkable" hypertext displayed in blue; you can test the validity of the URL you entered by 'clicking' on this hypertext link now before continuing with your edit.

This is the link View screen. To continue editing, 'click' on the Edit tab.

After testing the link, you may use your browser's back button to return to this view screen.

Once back to the edit screen, continue entering information that will become part of the browsing and searching capability at UFS.

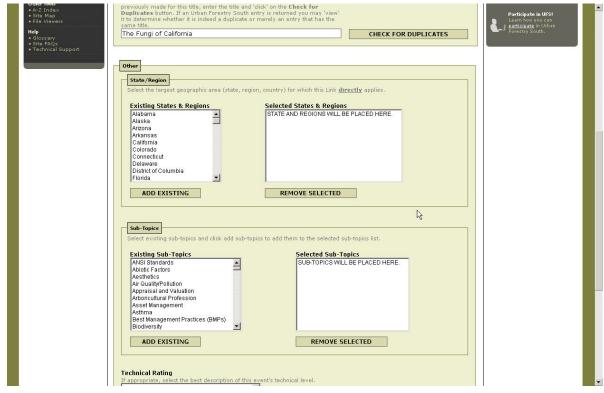


Image 10: Link Edit Screen: Additional Fields

For both **States & Regions** and **Sub-Topics**, selections are highlighted in the left-hand windows and then 'moved' to the right-hand window by 'clicking' on the **Add Existing** button. You can move multiple items across by using 'Ctrl Click' instead of 'Click'.

Continue to enter information in all the fields if possible. Non-required fields can be left 'blank' if necessary.

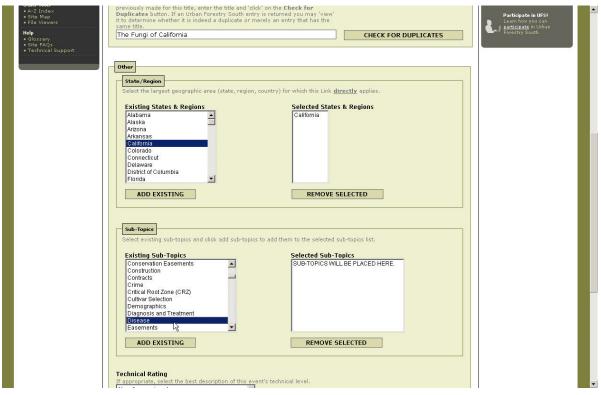


Image 11: Link Edit Screen: State/Region & Sub-Topic

In Image 11, the state/region has been selected and the user is in the process of selecting an appropriate sub-topics for this website.

A printed copy of the topic and subtopic list makes selection easier.

Technical ratings can help other users 'filter' information for level of technicality.

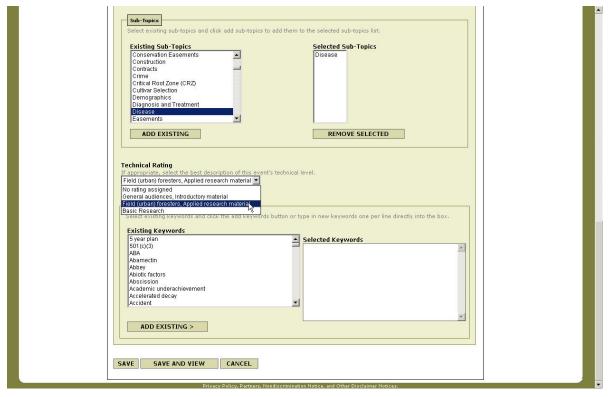


Image 12: Selecting Technical Rating

Select a technical rating for this content.

Continue editing with the entry of keywords.

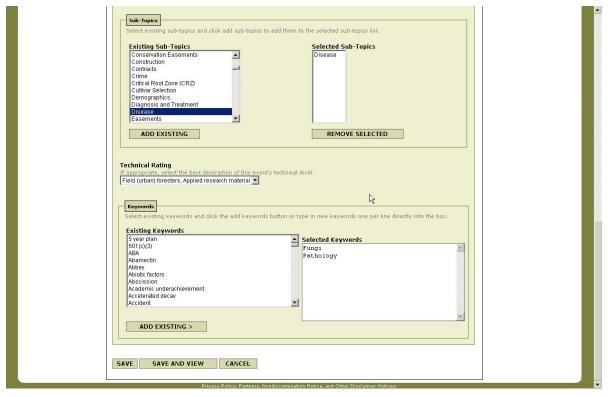


Image 13: Adding Keywords

The user enters keywords directly into the right window. Keywords can be single words or multiword phrases. Keywords are entered 1 per line (i.e. word or phrase) followed by the enter key.

See the **Keywords** section that follows in this guide for details on selecting and entering keywords.

The link View screen after a Save and View.

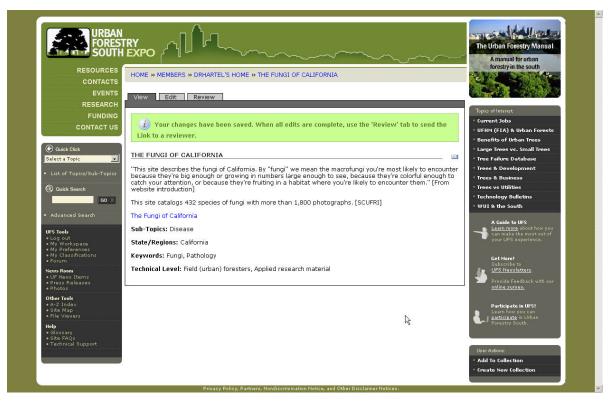


Image 14: Link View Screen: After Final Edits

You can review the final editing from either the **View** screen (Image 14) or the **Edit** screen. Changes can only be made from the **Edit** screen.

Your Workspace is where you create, edit, and manage your UFS content.

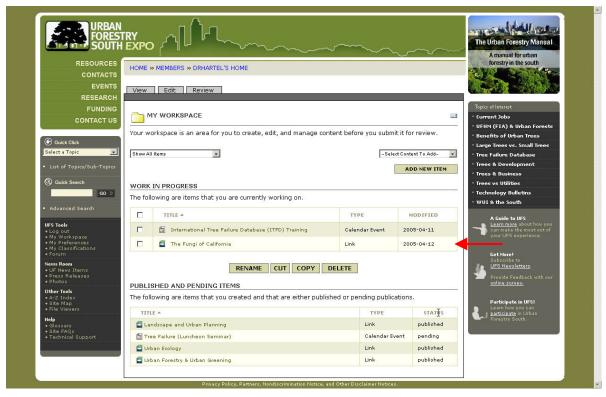


Image 15: Workspace: Works In Progress

Your workspace will hold all content not submitted in the **Works In Progress** section (see Image 15). Return to the **View** screen by 'clicking' on the title name.

Once at the View screen, you may select either the Edit or Review tabs.

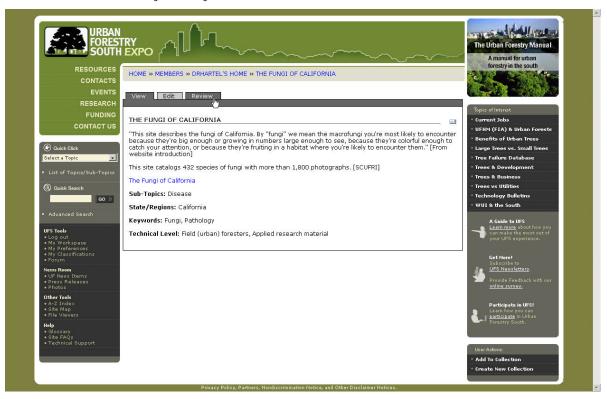


Image 16: Review Tab: Submitting Content for Review

When you have completed all edits, 'click' on the Review tab.

The Review screen is the final step in submitting content to UFS.



Image 17: Review: Send This Content to a Reviewer

Complete the addition of the web link by 'clicking' on the **Send This Content to a Reviewer** button. You will receive an e-mail confirming your submission.

Your Workspace will be updated immediately.

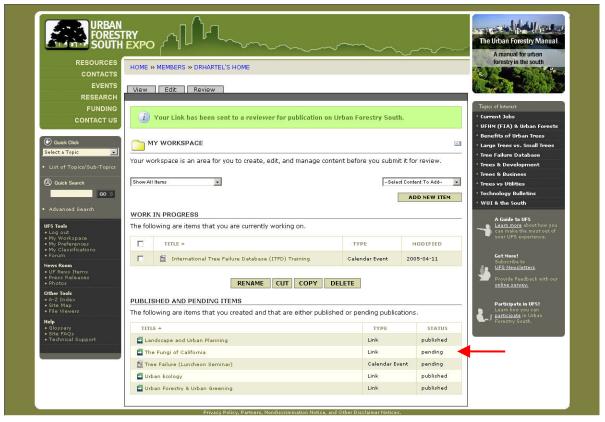


Image 18: Workspace: Pending

Content submitted for review will appear in the **Published and Pending Items** list of your **Workspace** as 'pending'. When the reviewer releases the item for 'publication' you will receive an e-mail notification and the **Status** will change to 'published'.

In order to edit an item that has been published, you may return it to your Workspace.

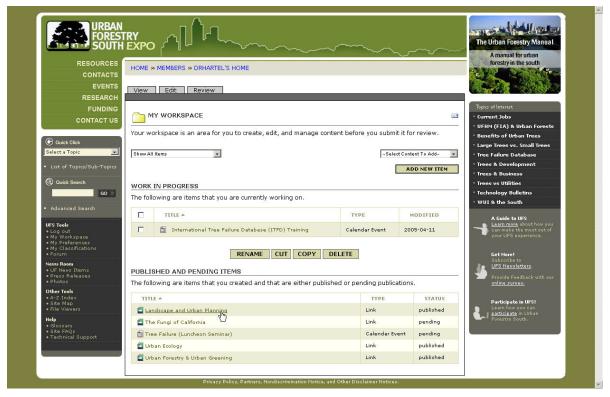


Image 19: Workspace: Published Items

Select a 'published' item by 'clicking' on the title.

Select the Review tab.

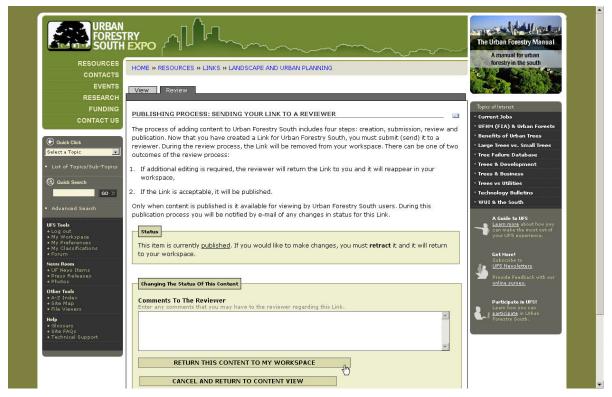


Image 20: Review: Returning Content to Your Workspace

'Click' on the **Return This Content to my Workspace** to permit editing. Once edits are complete, you must resubmit the item to a reviewer.



Guidelines for the Common Content Attributes

Regardless of the type of content you wish to submit, a general set of guidelines should be followed. The guidelines are designed to ensure consistency between and among various users that submit content.

Title:

For published research, books, conference proceedings (i.e. UFS's CITATION content type), and technology transfer products (UFS's TECHNOLOGY TRANSFER RESOURCE content type), the title should be entered exactly like the printed or electronic publication (or product).

For other content types, the title should be as short as possible, yet still adequately and uniquely naming the information being cataloged.

Duplicate titles may be warranted if, for example, the author(s) publish the same titled article in two print or electronic publications.

Description:

Depending on content type, the description may go by another name, such as: abstract, summary, or bio[graphy].

Succinct descriptions are most desirable, but they can actually be any length required to adequately describe the content. For research articles (i.e. CITATIONS), this will usually be a verbatim abstract provided by the author(s). Any descriptions that are copied directly from another source (e.g. an abstract or introduction) should be placed within quotation marks. The source will be assumed to be that of the author or publisher of the content begin cataloged. Optionally, you may place some abbreviated indication of the source in brackets following the closing quote.

For example:

"In evaluating over 1,000 public spaces around the world, Project for Public Spaces (PPS) has found that successful ones have four key qualities: they are accessible; people are engaged in activities there; the space is comfortable and has a good image; and finally, it is a sociable place: one where people meet each other and take people when they come to visit. PPS developed The Place Diagram as a tool to help people in judging any place, good or bad." [PPS website]

If the description is original (e.g. an annotation), then quotes should not be used, and you may (optionally) place your initials or other designation in brackets following the entry.

For example:

The current list of the general topics (26) and the detailed sub-topics used for the Urban Forestry South browse facility. [drh]

Additional information may be added, parenthetically, after the description if it can help distinguish this cataloged content from others that may be similarly titled or where a series of published content is created (e.g. dates for time sensitive material).

For example:

The current list of the general topics (26) and the detailed sub-topics used for the Urban Forestry South browse facility. [drh]

(September 20, 2004)

or...

"Communities in the Coastal Southern California region contain over 9 million people, or about 25% of the state's population. The region's climate is influenced by the ocean 85% or more of the time and extends from Santa Barbara south to the border with Mexico and from the coast to inland cities such as Camarillo, Hollywood, Anaheim and El Cajon. The role of urban forests – trees in parks, yards, public spaces, and along streets – to improve environmental quality, increase the economic, physical and social health of communities, and foster civic pride will be important to quality of life as these communities continue to grow in the next decade. Urban and community forestry has been recognized as a cost effective means to address a variety of important community and national issues from improving air quality to combating global warming.

"This guidebook analyzes the multitude of benefits that trees can provide to communities and residents. By determining the community and home owner savings from planting trees and subtracting the cost, this study found that trees more than pay for themselves. Over a 40-year period, after subtracting costs, every large tree produces savings of approximately \$2,600. This amount decreases with the tree's size with medium trees saving about \$1,000 and small trees breaking even." [Introduction]

(CUFR-48)

Note: The attribute, Publication Number should be used for assigning the original publisher's internal publication number to the content. It is also acceptable to place an internal publication number at the end of the description as in the preceding example.

If the description contains both quoted and original material, use quotation marks and bracketed annotations as necessary.

Because text references of an Internet link (URL) cannot be verified by UFS, follow that link with the date last accessed in brackets in a month year format (mmmm yyyy)

An example:

"In evaluating over 1,000 public spaces around the world, Project for Public Spaces (PPS) has found that successful ones have four key qualities: they are accessible; people are engaged in activities there; the space is comfortable and has a good image; and finally, it is a sociable place: one where people meet each other and take people when they come to visit. PPS developed The Place Diagram as a tool to help people in judging any place, good or bad." [PPS web site]

Urban forestry and 'green' infrastructure can have a positive impact on the following intangible components of successful places as discussed by Project for Public Spaces (see image):

- 1) Uses & Activities: Sustainable, Special, Active;
- 2) Comfort & Image: Walkable, Safe, Clean, "Green", Attractive;
- 3) Access & Linkage: Walkable, Connectedness;
- 4) Sociability: Welcoming, Stewardship. [drh]

Link: http://www.pps.org/topics/gps/gr_place_feat [September 2004]

Author(s):

Author's initials and last names are entered 1 per line (i.e. use the enter key following each name); follow each initial with a period, but there should be no spaces between initials.

For example:

E.G. McPherson K.I. Scott J.R. Simpson Q. Xiao P.J. Peper

Suffixes (e.g. Jr, III) may be added, but without a preceding comma (an unfortunate quirk of the our system). When it is necessary to enter an editor's name (in the **Author** field), follow it with the word EDITOR in parentheses; this most frequently occurs for TECHNOLOGY TRANSFER RESOURCES.

For example:

J. Geiger (Editor)

However, content types for BOOKS and CONFERENCE PROCEEDINGS will have an EDITOR attribute and this notation is not necessary for those entries.

Sub-Topic Selection:

The list of topics and sub-topics used for the UFS browsing feature (Quick Click) can be viewed or printed from the link in the left panel of any UFS screen. This is a 'controlled vocabulary', and users cannot create new entries, but must select from the list provided.



Image 21: Quick Click

When creating or editing content, sub-topics are selected from the alphabetical listing by high-lighting and 'clicking' on the 'ADD EXISTING' button to move them into the 'SELECTED SUB-TOPICS' list on the right.

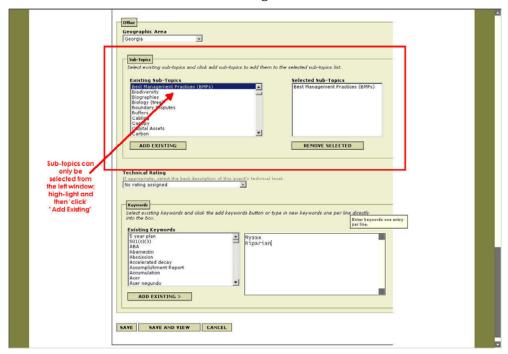


Image 22: Sub-Topic Selection

Only select sub-topics that <u>directly apply</u> to the content being added; in general from 1 to 5 sub-topics would be appropriate.

Keywords:

The user enters keywords directly into the right window. Keywords can be single words or multi-word phrases. Keywords are entered 1 per line (i.e. word or phrase) followed by the ENTER key. The first letter of the first word will be capitalized; all other letters will be lowercase unless the user specifically capitalizes them.

For example:

Growth

Growth control

Growth increments

Growth patterns

Growth rate

Growth regulation

Growth regulator

Growth regulators

Guangzhou

Guidelines

Gwinnett County

...

Quercus

Quercus nuttallii

SOD

Sudden Oak Death

Because keywords are used to locate related content, it is important to enter the significant words or multi-word phrases that will be used to relate this content to other content within UFS.

Alternatively, keywords can be selected from the list provided. However, the list (in the left window) is provided primarily for three reasons:

- 1. To assist with correct spelling (assuming you or someone else has already correctly used the word or phrase);
- 2. To illustrate the range of word and phrase combinations that other users are entering;
- 3. To investigate the previous use of singular or plural forms of a keyword.

Always use a keyword in its singular form unless its most common usage is plural.

When entering scientific names (i.e. genus or species) use the following guidelines:

- Only enter words or multi-word phrases that are significant
- If only common names for plants, insects or diseases were used in the title and/or description, enter the scientific names here;
- If scientific names were used in the title and/or description, then only the genus should be entered as keywords

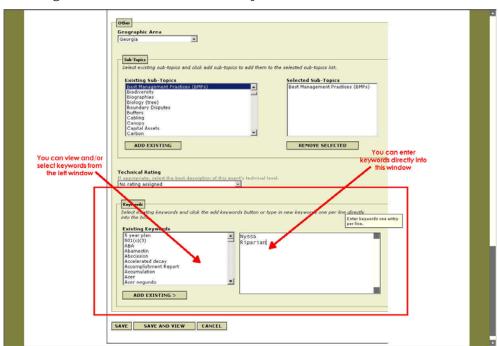


Image 23: Keywords

Publisher Location:

Enter the city, followed by a comma and the 2-digit state abbreviation. If a non-US city, use the state or province abbreviation followed by the country abbreviation in parentheses. Use standard, accepted postal abbreviations for the country.

For example:

Birmingham, AL or Birmingham, AL (US) Calgary, AB (CAN) Sydney, NSW (AUS)

Link: http://www.sog.org.uk/projects/csea/cseacod2.htm [September 2004]

State/Region (Geographic Area):

When known, select the largest geographic area (state, region or country) for which this content <u>directly</u> applies ...

- 1. If data was collected, select the specific location (i.e. state(s) or region(s)) where data was collected;
- 2. If the UFS content is not describing or reporting on specific data, then select the specific location (i.e. state(s) or region(s)) where the discussion is directly applicable.

A Listing of UFS Content Types

When content is created, the title, description, authors(s), and keywords become the primary searchable text. Entering this information accurately and consistently for all content types is an important step in creating a powerful Urban Forestry South.

Calendar Event:

A scheduled U&CF event. Date, time, location, sponsor are required for these entries.

Citation:

Scholarly or peer reviewed research. Also includes books, patents and USDA Forest Service publications.

Classroom Activities:

Activities for all grade levels from K through adult.

Cooperative Research Projects:

USDA Forest Service cooperative grants for research and other projects.

Data & Applications:

Database, spreadsheet and compiled programs related to U&CF. Also data to support U&CF planning and management.

FAQ:

A frequently asked question related to U&CF. (see SITE FAQs for questions about the use of the UFS website).

Flagship Programs:

Successful U&CF case studies.

Grant Announcements:

Funding announcements with information and applications or links to the organization offering the grant.

Image:

Photographs and other images that support effective U&CF communications.

Links:

URLs for U&CF related sites.

News Items:

U&CF 'clippings' from local, state and national news sources.

Organizations:

U&CF organizations (typically non-profit or government). Commercial (businesses, corporations) organizations are not acceptable in this content type

People:

These must be UFS registered members. Registered members may then request to be listed in either the speakers and/or researchers lists as appropriate for their experience. State U&CF Coordinators identify members to be listed as **State**



Contacts. The addition of a category for municipal/county arborists and urban foresters is under consideration.

Presentations:

Powerpoint (posters are in the **Document** Library under **Resources**).

Press Releases:

U&CF related press releases (access from the News Room).

Techology Transfer Resource¹:

Publications or products (CD, video, workbooks, etc.) that help disseminate U&CF research to a wider audience.

Tree Ordinance:

Tree and landscape ordinances. Full description and searching capability Under development.

Other Things You Need To Know!

Text Entry:

In text fields (see Image 24) formatting is not possible (e.g. bold, underline, italics, and tabs). Multiple spaces cannot be used for alignment. However, the ENTER key can be used to separate paragraphs.

These fields are scrollable and can accommodate unlimited text.

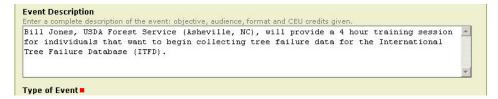


Image 24: Text Entry Fields: From the Event Edit Screen

¹ This content is makes up the national tech transfer database, UFind®.

Formatted Entry:

Some fields use an editor that allows the creation of formatted text (e.g. bold, italics, underline, intents), tables, lists and imbedded URL links.

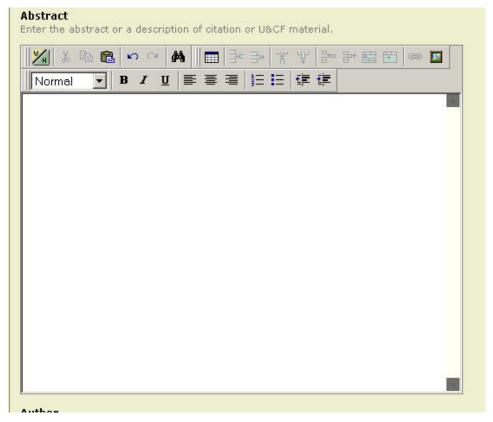


Image 25: Visual Editor Fields: From the Citation Edit Screen

Navigating Selection Lists:

When selection lists are used, you can navigate through them using several standard Windows techniques. By 'clicking' in the list and entering a letter, the list will immediately jump to that section (alphabetically) of the list.

You can drag the scroll bar to move quickly to other sections of the list, or 'click' on the arrows to move one line at a time within the list.



Image 26: Navigating a Long List

A Word About Style!

When quoting material in the description field, the following *Chicago Manual of Style* guidelines should be used:

- 1. Interpolations (a message, spoken or written, that is introduced or inserted) will use brackets [] to identify material added by the author that is quoting another source. This should also apply to information added about the source of the quote, for example [Preface], or [Abstract], that appears at the end of the description.
- 2. The "omission or suppression of parts of words or sentences" from a long quotation for the sake of brevity or clarity should be indicated with the ellipsis character (...).
- 3. When multiple paragraphs are being quoted, the following apply:
 - a. all paragraphs have an opening quotation mark,
 - b. only the final paragraph has an opening and closing quotation mark.
 - "The Center for Watershed Protection (CWP), in cooperation with the USDA Forest Service, Northeastern Area State and Private Forestry, produced this three-part manual series on using trees to protect and restore urban watersheds. The contents of the manual are the result of extensive research compiled over the past year as well as two design workshops held in early 2004 that focused on using trees for stormwater treatment and planting trees in the urban landscape. These workshops were attended by more than 40 local, regional and national experts, including foresters, stormwater engineers, landscape architects, arborists, urban soil scientists, watershed planners and representatives form parks, transportation and utility companies.
 - art 1: Urban Watershed Forestry Manual. This manual introduces the emerging topic of urban watershed forestry and presents new methods for systematically measuring watershed forest cover and techniques for maintaining or increasing this cover. The audience for this manual includes the local watershed planner or forester.
 - art 2: Conserving and Planting Trees at Development Sites. This manual presents specific ways to enable developers, engineers or landscape architects to incorporate more trees into a development site. The proposed approach focuses on protecting existing trees, planting trees in stormwater treatment practices, and planting trees in other pervious areas of the development site. This manual introduces conceptual designs for stormwater treatment practices that utilize trees as part of the design (referred to as stormwater forestry practices).
 - "Part 3: Urban Tree Planting Guide. This manual provides detailed guidance on urban tree planting that is applicable at both the development site and the watershed scale. Topics covered include: species selection, site preparation, tree planting and maintenance techniques, and special considerations for urban tree planting." Website descriptions]