TUTORIAL 3: Assessment Summary

The Assessment Summary part of a Resource records details about the name, role and type of activity of the assessor.

1 Getting Started

- To create a new site from the Homepage, click on 'Create New Heritage Resources' towards the top right of the page. This will take you to the 'Resource Manager' page (Figure 1).

Figure 1

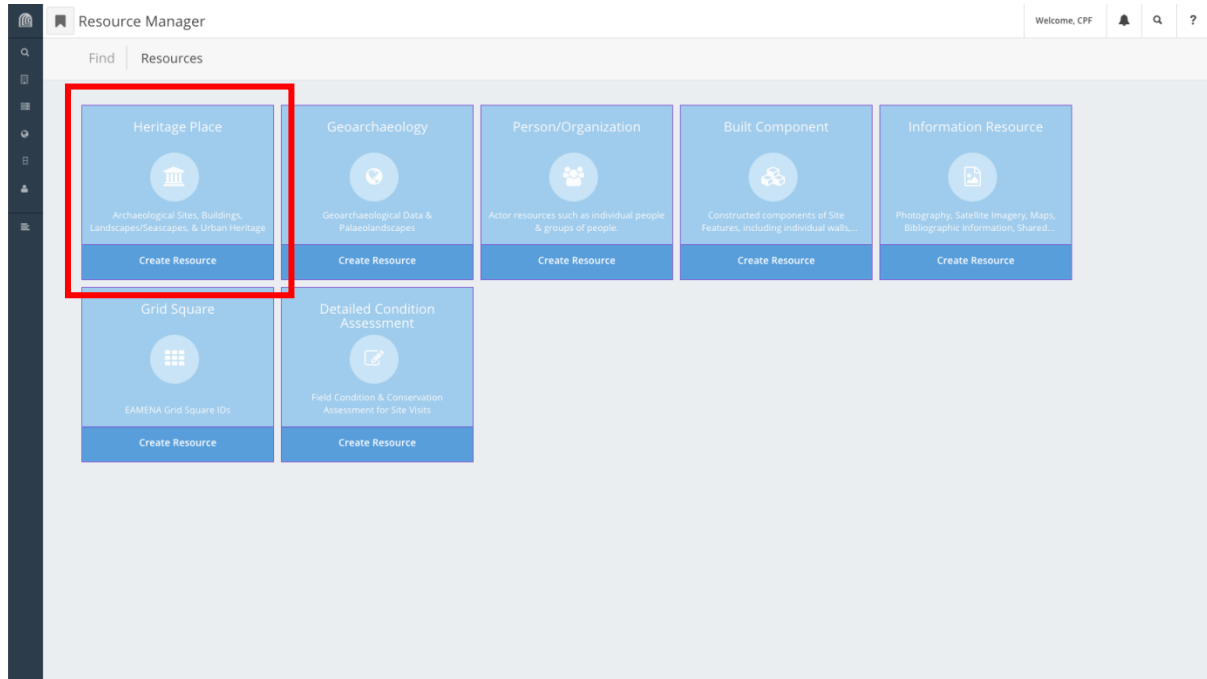- Choose 'Heritage Place' for a site, feature, or landscape/seascape (Figure 2). Click on 'Create Resource'.

Figure 2

- From within the database, you can also use the menu on the left side of the screen to create a new record.
- Click on the Arches symbol in the upper left corner of the screen (Figure 3) to reveal the full main database menu (Figure 4).
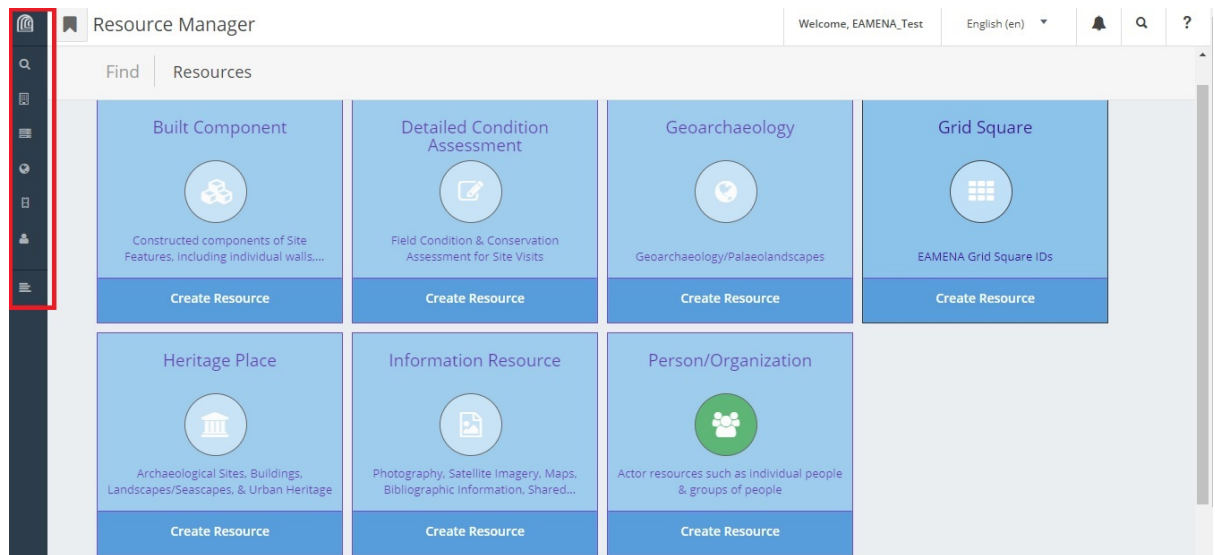- Choose from the list beneath 'Add New Resource' to start a new one.
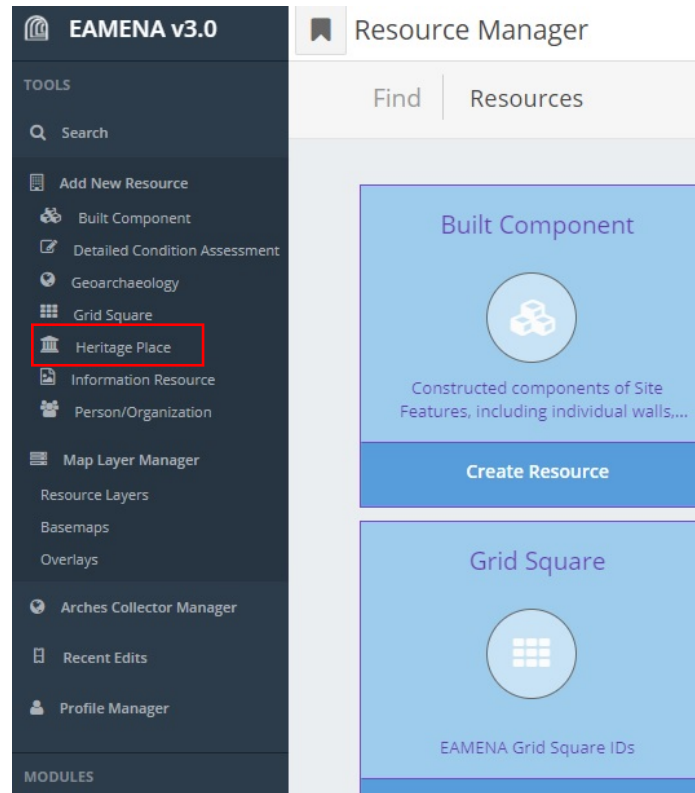

Figure 3

Figure 4

- To edit an existing site, search for your site and click on 'Edit' beneath its search result. For further information on searching and more detailed instructions, please refer to **Tutorial 1: Searching the Database**.

On the left-hand side of the screen under 'New Resource (Heritage Place)' (or, once you have saved the first information, the EAMENA-number) you will see the resource's 'Card Tree'. You can navigate between the different sections of the record by selecting the Cards.

- We recommend you begin with the first Card, which is the subject of this tutorial: 'Assessment Summary' (Figure 5).
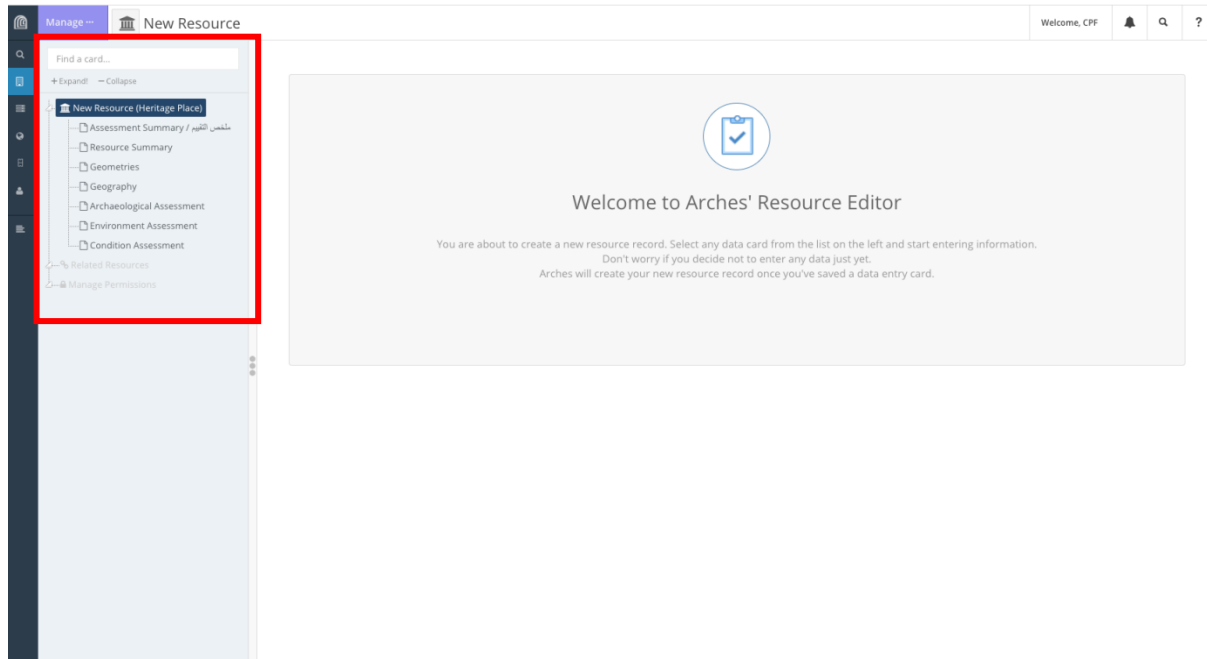
Figure 5: The Card Tree

2   Assessment Summary

The Assessment Summary card consists of five fields:

2.1   Assessment Investigator - Actor

In the 'Assessment Investigator – Actor' field, find and select the name from the dropdown of the investigator who is making or made the assessment.

- Often this is your own name, but it can also be the name of the person who did the field-based assessment and whose records you are entering into the database.
- To find the Assessor name more easily, type (part of) the name.
- Click on the name to add it.
- If the name is not in the list, choose 'Create a new Person/Organization'.
  - You can type 'create' or 'new' to bring up the "Create a new Person/Organization…" option.
    - Make sure to double-check that the name does not already under a different format (e.g. with the last name first or with a different spelling).
- In the 'New Person/Organization' window which will appear, enter the name in the format Firstname (or Initial(s)) Surname. Please use the English alphabet for this field (Figure 6).
    - Add the name in a different language or alphabet, e.g. Arabic, where applicable in the 'Alternate language name' field.
    - Click on '**Add**'.

Figure 6

The new Person/Organization you have now created will appear below the 'Assessment Investigator – Actor' field (Figure 7).

- Click on the 'pen' symbol to edit the 'Person/Organization' record you have now created.
- If you want to delete the added Assessor name from this record, click on the bin symbol to the left of the name.
- By clicking on the name, you can edit the type of relationship this Person has with the Heritage Place; however, for the 'Assessment Investigator – Actor' field this should be left alone.
- See **Tutorial 2: Person/Organization Records** for more information about creating and editing 'Person/Organization' records.

Figure 7

NB: Only add one Assessor here. If you choose a different Assessor from the drop-down, it will automatically overwrite the earlier chosen one.

- You will be able add additional Assessors after completing all the fields for the current one and clicking on '**Add**'. See **Section 2.8** below.

2.2 Investigator Role Type

Click on 'Investigator Role Type'. Choose from the drop-down list.

- Check the glossary for definitions

2.3 Activity Type

Click on 'Activity Type'. Choose from the drop-down list.

- Check the glossary for definitions.

2.4 Activity Date

- Click on 'Activity Date' and enter or choose the date on which the assessment is being/was done.
- Dates can be entered by clicking on the date on the calendar pop-up that appears or by typing the date in yyyy-mm-dd format (e.g. 2016-07-14 for 14 July 2016).

2.5 Google Earth Assessment

The Google Earth Assessment switch (Figure 8) is a shortcut to indicate that you are basing your assessment on Google Earth imagery without having to add each image separately (though it is still preferable to also do the latter).

- If you have used Google Earth imagery for the assessment you are currently adding, click on the switch to toggle it to green.
  - The Activity Type you chose above should contain the phrase 'Image Interpretation'.
- Make sure the switch is completely green (to the right) or blank (to the left), do not put it in the middle.

Figure 8: A filled in Assessment Summary group with the 'Google Earth Assessment' switch put on (green).

Click '**Add**'. Once you click Add, your record will be automatically saved and a unique 'EAMENA-ID' will be automatically assigned and appear at the top of the screen instead of "New Resource".

Once you have clicked 'Add', in the Heritage Place Card Tree on the left side menu, two additional cards / fields have appeared under the Assessment Investigator that you have just added (Figure 9): 'GE Imagery Acquisition Date' and 'Information Resource'

- These fields will allow you to provide further information about the imagery or other resources used specifically for this assessment.
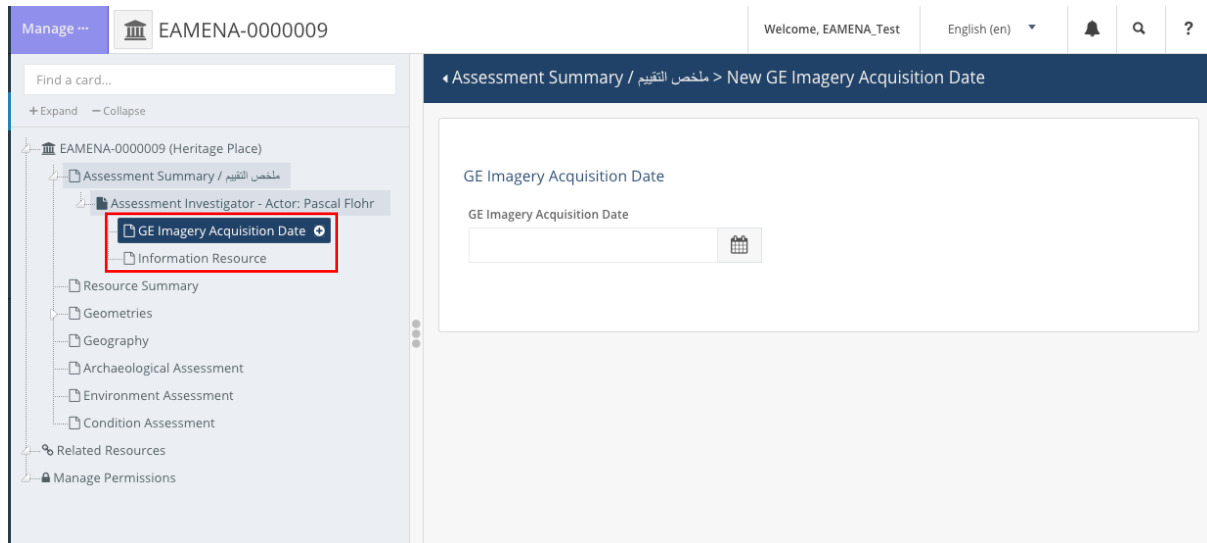
Figure 9: After adding the Assessment, two extra field groups appear, 'GE Imagery Acquisition Date' and 'Information Resource'.

2.6   GE Imagery Acquisition Date

If you have toggled the 'Google Earth Assessment' switch to green (yes), you should fill in the dates of the imagery you have used for the assessment in this Card (Figure 10).

- Enter the first date by navigating to it in the calendar view; make sure the date is in the yyyy-mm-dd format.
- Click on '**Add**'.
- Click on '+ Add New' on the top right corner of the page to add the next date as above.
- You can also navigate back to 'GE Imagery Acquisition Date' card in the Heritage Place Card Tree and click on the plus sign beside the card name add the next date as above.
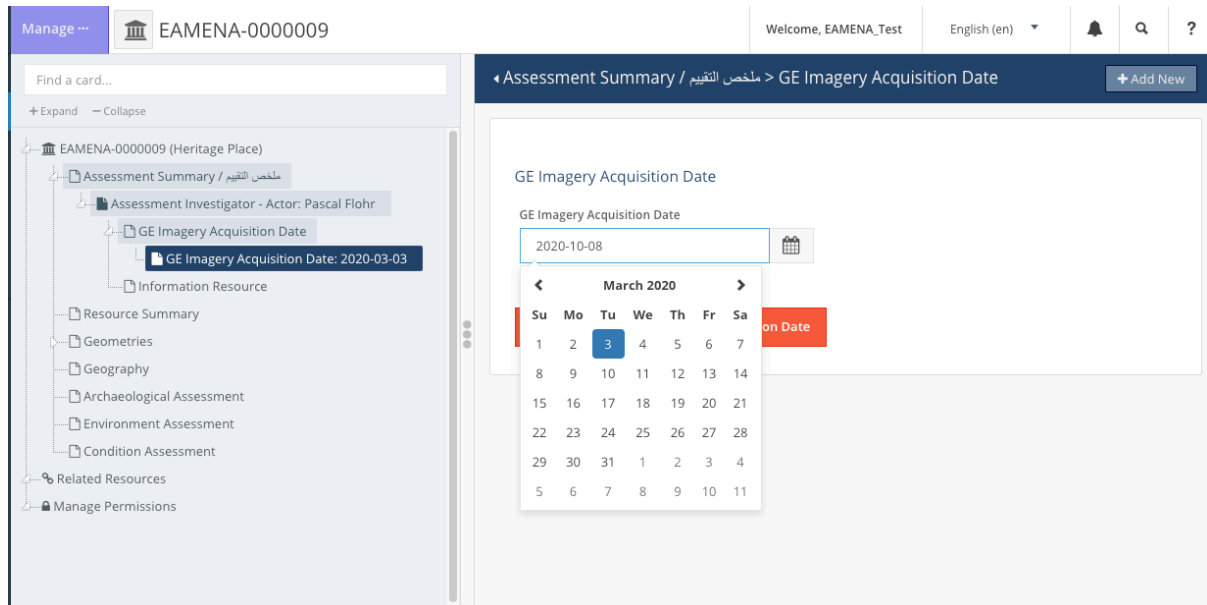- Repeat until you have added all the relevant dates.

Figure 10: 'GE Imagery Acquisition' window. From the menu you can see that one 'GE Imagery Acquisition Date' was already added (2020-03-03, or 3 March 2020). The second one is in progress of being added.

2.7 Information Resource

If you have used an Information Resource (imagery, publication, etc.) specifically for this assessment, add it in the 'Information Resource' Card (Figure 11).

- Look up the Resource ID number of the Information Resource that you have used (see **Tutorial 1: Searching the Database**).
- Type the number in the field and once it appears, click on it.
- If your Information Resource does not yet exist in the system, you can:
  - o Add it here by clicking on 'Create a new Information Resource'. Please note that it is **very important** to add all relevant information to the Information Resource record. Make sure to do this straight away by navigating to the record (you can do this by clicking on the 'pen' icon (Figure 11)).
  - o OR add it first separately (see **Tutorial 15: Information Resources**).
- Add the 'Information Resource Acquisition Date', i.e. the date the Information Resource was created (e.g. the day a photo was taken), in yyyy-mm-dd format.
- Click on '**Add**'.
- Add additional 'Information Resources' to each Assessment by clicking the plus sign next to the Information Resource Card name in the Card Tree
- If your Information Resource is applicable to the whole Heritage Place and multiple assessments, you should add it through the 'Related Resources' card (see **Tutorial 9: Related Resources** and **Tutorial 15: Information Resources**).
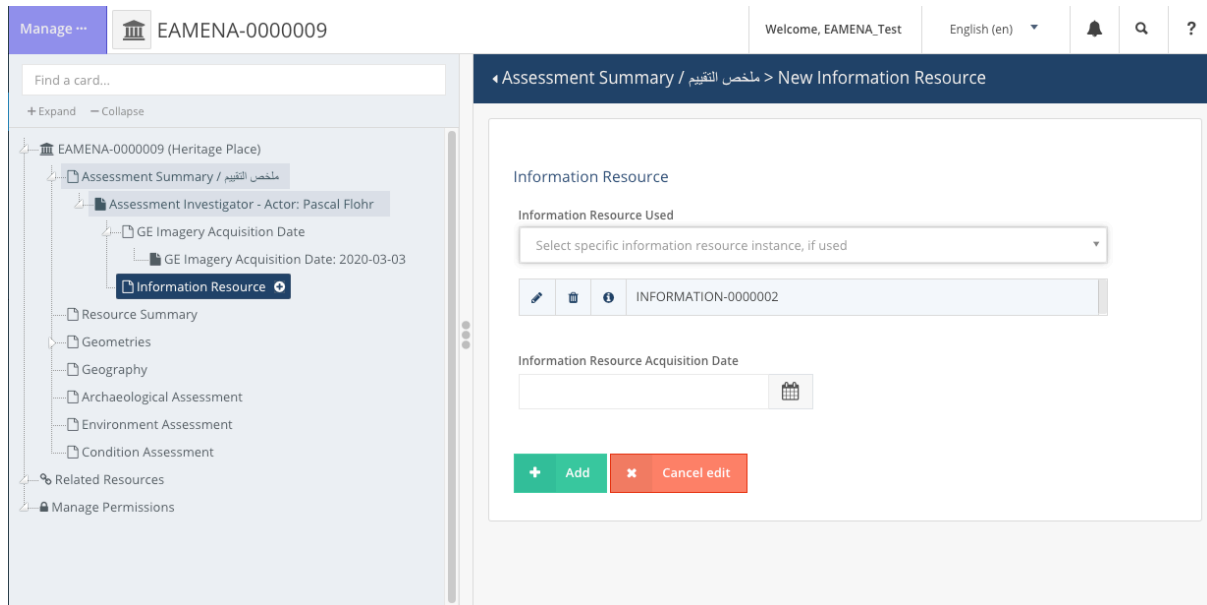
Figure 11: Adding an Information Resource to a specific Assessment. To navigate to the Information Resource record, click on the 'pen' symbol next to the Information Resource number.

2.8 Adding additional Assessment Summary entries

Enter as many Assessment entries as necessary (e.g. one each for field-based assessment and desk-based data entry, or one for each assessor if there are multiple).

- To add a new entry, using the Card Tree, click on the 'Assessment Summary' card and repeat the steps above.
- Alternatively, you can also click on '+Add New' on the top right corner of the page and repeat the steps above.
- Each assessment entry will appear under the main Assessment Summary Card in the Card Tree on the left side (Figure 12).
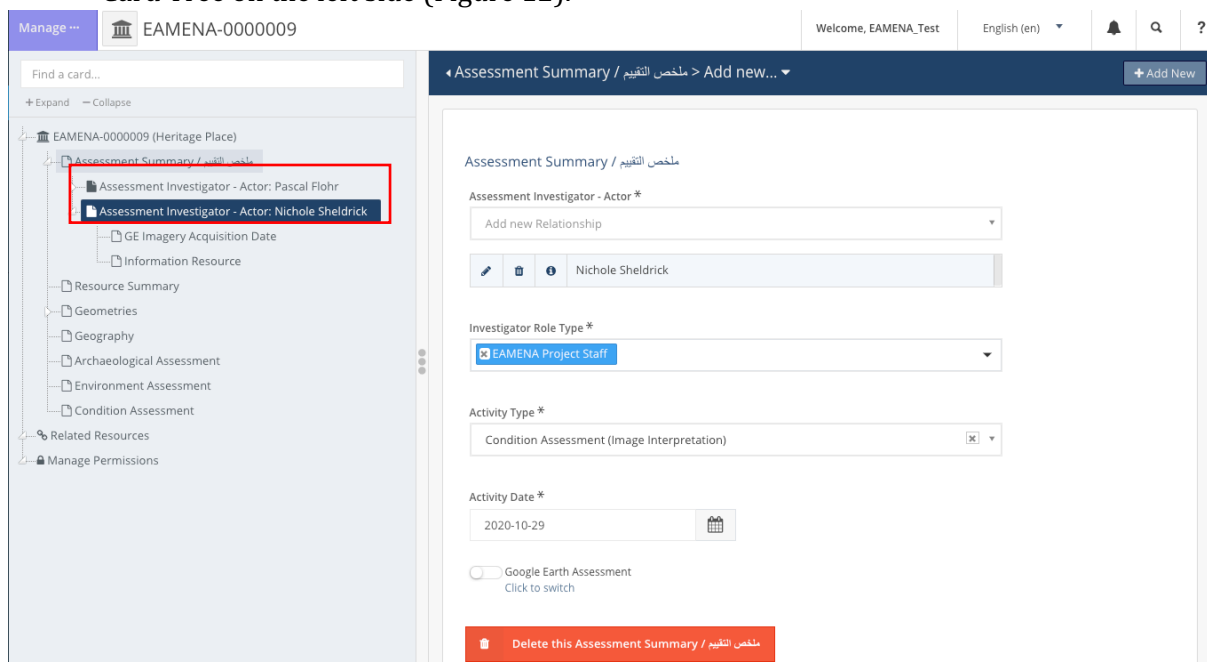

Figure 12: An Assessment Summary with two assessment entries added.