

# Quick Start guide

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Welcome to the U.S.FWS Falconry Application

**I. What is Falconry Application?** It is an online Database application designed by the US Federal Government to collect 3-186A from all falconers across the US.

**II. Who uses this application?** The state falconers in all 50 US States. Other users are Federal Biologist, State Administrators handle Falconry Permits, and State Law Enforcement Officers.

**III. How does the system work?** There are four (4) roles involve in this application:

**A. Federal role:** is a Biologist who is currently a Federal Government employee responsible to authorize all US State Administrators. This person is located in the USFWS/Division of Migratory Bird headquarter building in Virginia. Basically, this person collects data from all 50 US States Administrators, some states may have more than one Administrators, then enters the data into the system. Data of this type consists of State Administrator's name and addresses, e-mail and telephone number. The street address must be a physical state government facility.

**B. State role:** is a person employed by state government. S/he is responsible to enter falconers data from his/her state into the system. The falconer's data consists of two parts: falconer's name, address, e-mail, phone number and falcon permit.

**C. Falconer role:** is a person who owns a bird of type falcon, must have a valid Falcon Permit issued by his/her state where s/he lives. This person is responsible to report 3-186A to the US Federal Government using this online application. *Please note: the US Federal Government at this headquarter building in Virginia does not have any facility set up to accept 3-186A in paper. All Forms of type 3-186A must be entered electronically using this Falconry Database application.*

**D. State Law Enforcement role:** this role is new, recently requested by state of Massachusetts. Data of this role is also handled at the state level.

#### IV. How to start:

*To State Administrators: you are encouraged to create **fictitious falconer and law enforcement users** to test the system. This enables you to further train your own users using the Beta test site. Please keep in mind that in order to see the entire work flow, **please use your own e-mail address** in these fictitious/test accounts so that you can view the system messages sent to you.*

**Let's get start: WARNING:** In the newly redesigned falconry application, there are two (2) websites running side-by-side: One is called **BETA** and the other is called **Production**.

1. **The BETA website** is used to test the product when there is a new release published and to train users of all roles 365x7x24. Its URL (*Uniform Resource Locator*) is: <https://epermits.fws.gov/falct>. (notice the last letter is “**t**” for “**Test**”.) Recently – Thursday, July 26, 2018 – Eric Slater, state of Colorado Administrator requested that the banner for BETA website should somehow be made different to avoid confusion since the 2 sites look identical. As a result, I moved the banner text (**Welcome to Migratory Birds/Falconry Application**) to the left of the FWS/Logo, attached the word “[BETA]” at the end of the sentence, and painted the text “**RED**”, the FWS logo stays on the right and painted black & white. This change is effective immediately for beta website only.

2. **The Production website** is for REAL stuffs, it contains real data and cannot be used to train nor test. Its Data is LEGIT! Its URL (*Uniform Resource Locator*) is: <https://epermits.fws.gov/falcp>. (notice the last letter is “**p**” for “**Production**”.)

To access both websites, one must be authorized by the appropriate USA Government Agencies (*States and Federal/FWS only*). In other word, to register, one must have an “**Authorization code**” (formerly called **FEDID**) issued by one of the two USA Government Agencies mentioned.

I wrote this **WARNING** in here because some folks have been familiar with the test site during testing or training, then when we go live, some may be still using the test site to enter their data. So, please make sure to read the URL displayed on your Internet Browser or click the **Help** menu dropdown box/**About** to view the Version Number displayed. **After we go live for a new version, there is no way to transfer test data to production database.**

## A. Federal role

Logon to the system as Federal Administrator, at the home page click “Manage State Agents” button.

**1. Add a new State Administrator:** do the followings:

- 1.1. Click “Add New State Administrator” button
- 1.2. Enter data for State Administrator
- 1.3. Click “Save” button when done.

**2. Edit an existing State Administrator:** go back to page “.../falcManageSA” and do the followings:

2.1. Click the “List State agents by State” or “List State agents by Name” button. This is similar to “Query” function, because US only has 50 states in the union, so I decided to pull in the entire US States list without offering a complicated query parameters

2.2. Scroll down pass the Falcon image to find a State Administrator to edit, then click on the url with the word “Edit...”

2.3. Make change to the data and press “Save” button to save your changes.

**3. Remove an existing State Administrator:** go back to page “.../falcManageSA” and do the followings:

3.1. Click the “List State agents by State” or “List State agents by Name” button

3.2. Scroll down pass the Falcon image to find a State Administrator to delete, then click on the url with the word “Remove...”

3.3. View the record, then press “Delete” button to remove the record.

## B. State role

Is responsible for managing all state falconers and their 3-186A (*optional*), local Law Enforcement Officers (*optional*). Log on to the system as State Administrator user, at the home page, do the followings:

### **B.1. Click “Manage Falconer” button.**

#### **1. Add a new Falconer:** do the followings:

- 1.1. Click “Add New Falconer” button
- 1.2. Enter data for the new falconer
- 1.3. Click “Save” button when done.

#### **2. Edit an existing Falconer:** go back to “.../falcManageFC” or “.../falcQueryFC”, do the followings:

- 2.1. Click the “Query Falconer” button. You will see a query page with empty fields on it with one exception: the state field hosts your state code
- 2.2. Click “Find”, this will bring all falconers from your state into view (default, if you ignore all query parameters)
- 2.3. Scroll down pass the Falcon image to select a falcon record, then click on the url with the word “Edit...”
- 2.4. Make change to the data and press “Save” button to save your changes.

#### **3. Remove an existing Falconer:** go back to “.../falcManageFC” or “.../falcQueryFC”, do the followings:

- 3.1. Click the “Query Falconer” button. You will see a query page with empty fields on it with one exception: the state field hosts your state code
- 3.2. Click “Find”, this will bring all falconers from your state into view (default, if you ignore all query parameters)

3.3. Scroll down pass the Falcon image to select a falconer record, then click on the url with the word “Click to Remove Falconer...”

3.4. View the record and click the “Delete” button to remove the falconer profile.

**B.2. Manage 3-186A (optional) as a State Administrator:** back to home page, click at the “Manage 3-186A” button, you will land on page “.../falcQueryF3”.

*Note: As a State Administrator, to add a new 3-186A for a falconer, you must first query an existing 3-186A to find a falconer you are trying to help. If the falconer does not have any 3-186A (Case A), then you would look for him/her in the Falconer profile table (Case B/New falconer).*

**B.2.1. Case A:** Add a 3-186A. Click the “Find” button while you are on page “.../falcQueryF3” page, if there is no record found, go to Case B (B.2.2) below.

1. Scroll down pass the Falcon image, find a falconer you want to help, then click on the url with the label “Add new 3-186A”. You will land on page “.../falcNewF3186AQ1?at=1”

2. Answer question(s) on the next page(s), depend on what section of 3-186A you select, the Data entry form for 3-186A will be prefilled with the falconer info. Please observe carefully two blocks: Sender and Recipient and make correction(s) if needed. Then complete the form.

3. When done, click “Save” to save the data.

**B.2.2. Case B:** Add a very 1st 3-186A. You arrive here when a falconer you are trying to help does not have any 3-186A in the system [1st time report]. Please do the followings:

1. On the Home page, click “Manage Falconer”, you will land on page “.../falcManageFC”

2. Click “Query Falconer”, you will land on page “.../falcQueryFC”

3. Click “Find”, this will list all falconers in your state only (default).

4. Scroll down pass the Falcon image, find a falconer you want to help, then click on the url with the label “Add new 3-186A”. You will land on page “.../falcNewF3186AQ1?at=1”

5. Answer question(s) on the next page(s), depend on what section of 3-186A you select, the Data entry form for 3-186A will be prefilled with the falconer info. Please observe carefully two blocks: Sender and Recipient and make correction(s) if needed. Then complete the form.

6. When done, click “Save” to save the data.

**B.2.3. Edit an existing 3-186A as State Administrator** At home page, click “Manage 3-186A” button. You will land on page “.../falcQueryF3”. Do the followings:

1. Click “Find” to list all 3-186A in your state (default)
2. Scroll down pass the Falcon image. Find the record you want to edit, then click on the url with the label “Edit this 3-186A record...”
3. Make change to the data and press “Save” button to save your changes

**B.2.4. Remove an existing 3-186A as State Administrator** At home page, click “Manage 3-186A” button. You will land on page “.../falcQueryF3”. Do the followings:

1. Click “Find” to list all 3-186A in your state (default)
2. Scroll down pass the Falcon image. Find the record you want to delete, then click on the url with the label “Delete this 3-186A record...”
3. View the record, click “Delete” button to remove the record

**B.2.5. Print a 3-186A.** At home page, click “Manage 3-186A” button. You will land on page “.../falcQueryF3”. Do the followings:

1. Click “Find” to list all 3-186A in your state (default)
2. Scroll down pass the Falcon image. Find the record you want to print, then click on the url with the label “Print this 3-186A record”
3. The record will be displayed in full view. Use your Web Browser Print icon/command to print the form.

**B.3. Manage State Law Enforcement Officer.** Click “Manage Law Enforcement”, you will land on page “.../falcManageLE”, do the followings:

**B.3.1. Add a new State Law Enforcement Officer.**

1. Click “Add new LE officer”, you will land on page “.../falcEditLE”
2. Enter data for the new LE Officer, press “Save” when done.

**B.3.2. Edit an existing Law Enforcement Officer.**

1. At home page, click “Manage Law Enforcement” button. You will land on page “.../falcManageLE”
2. Click “Query LE Officer” button. You will land on “.../falcQueryLE”
3. Click “Find” to list all LE Officer from your state (default)
4. Scroll down pass the Falcon image, select an LE profile, then click on the url with the label “Click to Edit this LE Officer...”
5. Make change to the selected LE profile. Press “Save” when done.

**B.3.3. Remove an existing LE Officer.**

1. At home page, click “Manage Law Enforcement” button. You will land on page “.../falcManageLE”
2. Click “Query LE Officer” button. You will land on “.../falcQueryLE”
3. Click “Find” to list all LE Officer from your state (default)
4. Scroll down pass the Falcon image, select an LE profile, then click on the url with the label “Click to Remove this LE Officer”
5. View the record, then press “Delete” to remove the record.

**B.4. Transfer a Falconer** from 1 location to the next.

State Administrators are responsible to physically transfer a falconer from 1 location to the next. The Transfer occurs in 2 steps:

**1. Step 1:** the falconer must initiate the move by logging on to the system, select “Report a move” (see *C. Falconer role/C.2.*), enter the new addresses, once submitted, a message along with the new addresses will be sent to his/her State Administrator(s) [SA].

**2. Step 2:** Then the SA logs on to the system using info. provided by the falconer retrieved from e-mail to complete the request by doing the followings:

2.1. Go to home page, click “Manage Falconer”, you will land on “.../falcManageFC”

2.2. Click the “Query Falconer” button. You will land on “.../falcQueryFC”

2.3. Click “Find”, this will bring all falconers from your state into view

2.4. Scroll down pass the Falcon image to select a falcon record who wants to be transferred, then click on the url with the word “Click to Transfer...” This will land you on page “.../falcXfer...”

2.5. Make change to the transfer request data entry form, once done, click “Submit”. A detail message is sent to the destination State Administrator(s) where the falconer will move to, the same message is copied to the falconer who initiated the move. From this point on, the source State can only view the falconer’s data.

Note: Transfer applies to both move within the same state and move out of state. They both work the same except when move within same state, the state field is protected.



## C. Falconer role

Falconers can only manage their own 3-186A. To change personal profile such as email, street address or transfer location, phone..., falconers must notify their states of such changes via e-mail (*automatically*) or phone (*manually*).

**Why falconers cannot update their own profile?** This is by design, falconers' profile are tied to state permit and federal 3-186A forms. Since states are issuing falcon permits, it makes sense to see states have absolute control of their falconers' profile data. They (*the states' Administrators*) are responsible to make sure the falconers' personal information are 100% at all time in both state and federal databases, while falconers are responsible to *notify* their states of changes in their personal profile. So, *states* are the only place where “*data entry for all falconers' profile*” takes place. This avoids “*update anomaly*” (**Update anomaly** means data inconsistency and redundancy, is a database design terminology used regularly in the 20<sup>th</sup> century.)

Log on to the system as a Falconer and follow steps below:

### C.1. Manage 3-186A as a falconer

#### C.1.1. Add a new 3-186A.

1. At home page, click “Manage 3-186A”, you will land on page “.../falcQueryF3”
2. Click “Add new 3-186A”. You will land on page “.../falcNewF3186AQ1”
3. Follow instructions on the next page(s) to complete your form
4. Once done, click “Save” to save your new form.

#### C.1.2. Edit an existing 3-186A.

1. At home page, click “Manage 3-186A”, you will land on page “.../falcQueryF3”
2. Click “Find” to list all your forms (default)
3. Scroll down pass the Falcon image, find a record you want to edit, then click on the url with the label “Edit this 3-186A record...”
4. Make change to the data, click “Save” to save your changes.

### **C.1.3. Delete an existing 3-186A.**

1. At home page, click “Manage 3-186A”, you will land on page “.../falcQueryF3”
2. Click “Find” to list all your forms (default)
3. Scroll down past the Falcon image, find a record you want to delete, then click on the url with the label “Delete this 3-186A record...”
4. View the record, press “Delete” to remove the form.

### **C.2. Report a move as a falconer.**

1. At home page, click “Report a move”, you will land on page “.../falcRptMov1”
2. Select an option, you will land on page “.../alcRptMov2”
3. Enter the new addresses, once done, click “Submit”, this will send a message with your new addresses to your State Administrator(s). Wait for your State Administrator words.

### **C.3. Query Registered 3-186A data.**

At some points, falconers may want to view their registered 3-186A data. So, how to query your 3-186A? Logon as a falconer role, at home page, click “**Query 3-186A**” button, you will land on query 3-186A page “.../falct/falcQueryF3”, scroll down to where you first see the falcon image. Immediately above the falcon image is a line of buttons in “blue” ink. Click the “**Find**” button, this will bring all of your past and present registered 3-186A records in to view. Scroll down past the falcon image to view your data. This is a “default” mode, to narrow or expand your search, simply fill in the parameters provided on the top part of the “Query 3-186A” page.

## D. State Law Enforcement Officer role

State Law Enforcement Officer role will have only “query access” to the system. Log on to the system as an LE and follow steps below:

### D.1. View Falconer’s profiles

1. At the home page “.../falcHome”, click “LE Query” button. You will land on page “.../falcOtherQuery”
2. Click “Query Falconer” to view Falconer’s profile. You will land on page “.../falcQueryFC”
3. Click “Find” to see all falconer in your state
4. The query results will be placed below the Falcon image.

### D.2. View 3-186A

1. At the home page “.../falcHome”, click “LE Query” button. You will land on page “.../falcOtherQuery”
2. Click “Query 3-186A” to view 3-186A. You will land on page “.../falcQueryF3”
3. Click “Find” to see all falconer in your state
4. The query results will be placed below the Falcon image
5. To print a 3-186A, simply click the url labeled as “Print this 3-186A record...”, then use your Browser Print icon/command to direct the page contents to your local printer.

## V. Account Activation

This section explains how a new user can access the Falconry application.

To access Falconry application, a user must be authorized by a *US Federal Administrator* if the new user is a State's Administrator, or by a *State Administrator* if the new user is a Falconer or a local Law Enforcement Officer. Regardless of roles, all new users must go through the same "Activation" process to create his/her logon credential to access the system.

1. **To activate new account:** simply use the one-time "**Authorization code**" to create your account (*log on ID and password*). This authorization code is formerly called Federal Identification number or FEDID. *All FEDID of existing falconers are retained, they already have access accounts, so there is no need to activate their accounts.* In the newly designed falconry application, Authorization code is useless other than a one-time use to activate one's account and for *internal use only*.

2. **How to obtain an "Authorization code"?** if you are a State Administrator, please contact our [US Federal biologist](#). Otherwise, please contact your State Administrator where you live. A list of State Administrators may also be obtained from the [main page](#). In all cases, you must have an *email address* in order for your *Administrator* to send you the *authorization code*.

Once you get *the authorization code*, simply hop on to our [main page](#), click "**Activate new account**" button and follow the instructions on the next page(s). This is a one-time action required. Once your Logon credential is created, you may begin to access the on line Falconry application.

**Please note:** the newly designed Falconry application will work with a smallest hand-held device you ever own, e.g. iPhone, mobile phone... beside desktop devices.

## VI. Miscellaneous

This section explains some of the common fields within the new Falconry system:

**1. LOCKED:** when this check box is “*checked*”, it prevents any user to access the system temporarily. LOCK may be turned off by a State Administrator when a locked user meets his/her Administrator’s conditions(s); LOCK can also be turned on by a user when s/he fails to provide his/her logon credential 5 times in a row.

To avoid being LOCKED due to invalid credential, use “*Forget Password*” from the login page. *Prerequisite for “forgot password”: a valid e-mail must be defined within the user’s profile record in order to use this feature.*

**2. DISABLED:** this check box is checked by State Administrator to prevent an individual from gaining access permanently. A disabled account may be re-enabled by a State Administrator when certain conditions demanded are satisfied.

**3. ACTIVATED:** this check box remains “*unchecked*” until a new user “*activates*” his/her account using “*authorization code*” authorized by his/her State Administrator. *Note to all Administrators: Please do not “check” this field, instead, let it checks itself when the user logons and activates his/her account. This is the way you, as administrators, know who has or has not created his/her account.*

**4. Date Created, Date updated, Created by, Updated by, Last activity/action...** are system data and are protected. They appear as *For Your Information (FYI)* purposes.

**5. Format of Date field:** all data fields of type *date* on the falconry application use the current Standard USA Date format: MM-DD-YYYY or MM/DD/YYYY (*you may use the last 2 digits for the year part, e.g. 18 for 2018*). In short, if you see a date field on your edit data entry screen with “*time*” in them, simply erase the time part before “*Save*” the data to avoid error when clicking the “*Save*” button. *To obtain the system Today’s Date, simply double-click on the date field itself, if nothing returns, this means your device prohibits scripts.*

**6. How to find your query data:** by default, when you click on the “*Find*” button without typing anything on the query form (*contains query parameters*), the system will return data *based on your personal logon profile (see the Logon Info. displayed below the*

*web page title*). The query results are placed below the black & white falcon image. Please scroll down to view your query results.

**7. What are the blue/purple URLs appear on various lists of query result:** depend on your role, you may or may not see these *URL* placed above each user's record. These URLs provide further access into the system based on your access privileges. Please read each URL text label before clicking on them. For local Law Enforcement Officers, the only "*Print...*" URL will be available depend on type of data you after.

**8. Download Excel files:** this is not a true Microsoft Excel file as you may think. It is rather a Comma Separated Value (CSV) text file, which is compatible with many brands of spreadsheet software available on the market today, and Microsoft Office Excel is one. To download, simply query the data (*Falconer* or *3-186A*), then from the query result pages, click on the URL labeled as "*Click to download CSV data*". Depend on how your browser settings are set on your computer, generally you may direct it to save the download file as... (give it a name) or "*open it right away*". The latter will bring the data into Microsoft Excel program if your PC has this software. The only drawback on this CSV file is that the column titles are placed at the end of the file. Once the data imported into Excel, simply do the followings:

- a) Insert a new empty row at the top of the spreadsheet
- b) Go to the bottom of the file, *cut* the column title row (last row) to your computer clipboard
- c) Go to the top of the spreadsheet, place the cursor on the very 1<sup>st</sup> cell of the empty row you created earlier, then *paste* the contents of your clipboard onto this row.
- d) Finally *save* the file.

For State Administrator, s/he may down load the entire user profile and 3-186A data of his or her state. For falconer, s/he may only download 3-196A data that s/he owns.

**9. Printing to PDF files:** the current application does not implement "*Print*" function of any types. Since it is a web based application, each client browser already has its own printing system at the client device (*your computer*). I only provided a *free PDF print driver* here just in case you need it. This driver is an open source software, if your device does not already have a *PDF printer driver*, you are welcome to download my copy available free under the *Help menu item* from the top of the web page, select "**PDF Printer Driver (Free)**" and save it to your computer, then install it yourself later. Once

done, use the browser's *Print icon/command* to direct the page contents you wish to print to the "**PDF Creator**" printer instead of your usual/default printer. Once the print is finished, you may save that PDF file to anywhere on your computer. Optionally, you may download a free PDF Printer driver from the internet of your choice, make sure it is free of bugs and viruses.

## VII. Logon ID & Password

The new falconry application no longer requires *Authorization code* (formerly *Federal Identification/FEDID*) as part of the logon credential to gain access.

**Logon ID** is created by the user via “*Account activation*” process. In other word, to access the falconry website, one must be authorized by the USA Federal government or one of the USA State governments/Falcon permit issuing offices (see III for roles).

Many existing falconers from the old system already have their Logon ID assigned by the old system, so, they do not need to be authorized or registered, nor “*activate new account*”. However, for new users, they must activate their new accounts using the *authorization code* issued by either federal or state government agencies based on the role applied.

**If your users forgot their Logon ID**, you may go ahead give them this piece of data.

**How to find out a Logon ID of an existing falconer?** By downloading the Falconer User’s Profile, this file contains both the **Logon ID** and the **Authorized code** (formerly FEDID). *And only state’s administrators may download their state falconer’s User Profile any time.* Please follow these steps below: (*Note: the former FEDID starts with 3 letters “FED” followed by a number*)

1. Logon as state Administrator, at the home page, click “**Manage Falconer**”, then click “**Query Falconer**”.
2. On the Query falconer page, click “**Find**” (*default query mode*); once done, the query will show how many records it found. Scroll down past the falcon image and click *once* on a URL labeled as “*Click to download CSV data*”, this URL is placed on every falconer’s profile block and has the same contents, you only download it one time. Instruct your web browser to save the download CSV file to your local computer. **Do not share this file with anyone. As a “state administrator”, you are responsible to secure your falconer’s data on a computer issued by your state’s government.**
3. Open the CSV file you have downloaded using any available spreadsheet software installed on your computer that can work with CSV (*Comma Separated Values*) file. I am



using *Microsoft Office Excel* program as example here. Once successfully opened, your CSV file is referred to as “**worksheet**” [*Microsoft’s terminology*].

4. Scroll to the top of the worksheet, insert a new blank line. This new line must be placed at the top of the worksheet and has nothing in it.

5. Scroll to the bottom of the worksheet, select the entire last line that contains the CSV column heading titles, use the Excel “**CUT**” command to store this line to your computer clipboard.

6. Scroll to the top of the worksheet, select cell “A” or column “A” of the very 1<sup>st</sup> blank line you have created earlier, use Excel “**PASTE**” command to bring back the column heading titles you have stored on your computer clipboard earlier. Finally **Save** the file.

7. With the column heading titles are on top, you now can see columns A and B read as “*userid*” and “*authorized\_cd*” side-by-side. The **userid** is the **Logon ID** you want to give to your falconers. If columns “A” and “B” are identical in values, this means s/he has not created his/her account via “*activate new account*” yet, you will send the new falconer the “*authorized\_cd*” instead to remind the falconers to logon and create their new accounts.

**8. Before sending Logon ID** to a falconer, make sure you edit his/her Profile with his/her **up-to-date E-mail** first. Because “*E-mail*” is a very important piece of data a falconer needs to help himself later. Once done, **use your state government issued e-mail to send the falconer his/her Logon ID.**

**Please note:** on the logon page, there is a “*Forgot password*” URL available to everyone regardless of roles. To use this feature, one is required to enter a valid **Logon ID** and an **E-mail behind the scene** ready to accept messages.

## VIII. Security

**Both Federal Role and State Administrator Role**, you are responsible to protect the USA Government data as well as the falconers' data by only using the devices or computers, including your email addresses, and your phone numbers that are issued by the USA Federal Government or USA State Governments only. Your duty location must be the physical address of the USA Federal Government or USA State Governments. **As State Administrators**, you should download falconers' data onto your computers that are issued by your state governments only.

**--- End ---**