



# PA-SHARE Tutorial: Submitting Surveys, Resources, and Reports for Environmental Review Archaeological Investigations

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**This tutorial will teach users how to submit archaeological survey and site data as well as the associated archaeological investigation reports for Environmental Review (ER) projects in PA-SHARE.**

Review the complete tutorial or navigate to a specific section by hovering over an entry in the Table of Contents and following the instructions.

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### Overview

To submit information about an archaeological survey, archaeological resource, and/or submit a report for an archaeological survey as an Environmental Review (ER) project, the information **must first be requested by the PA SHPO through PA-SHARE**.

Most commonly, the PA SHPO requests an archaeological survey by responding to an initial ER project review. To initiate consultation on an ER Project, please see guidance on [Submitting a New Environmental Review Project](#).

### Adding New or Updated Surveys For Existing Projects

If you need to initiate a new survey or update an existing survey for an existing ER project, email the following information to [pashare@pa.gov](mailto:pashare@pa.gov):

- Project Name
- Project Number and/or Legacy Number (former ER Number)
- Your name, address, phone number, and email address
- An explanation of what you are submitting
- Information being submitted as an attachment

PA SHPO will request a survey proposal, a new survey, or a survey update in PA-SHARE. The project contacts listed in PA-SHARE for the ER project will receive an email notifying you that a PA-SHARE submission response is available for your review.

Once you receive this response, you are able to submit survey and/or resource data or submit an archaeological report through PA-SHARE. The steps for reviewing the PA SHPO response and entering survey information, specific site data, and a final report is outlined below.

**NOTE:** You must be listed as a Project Contact to receive PA SHPO responses and submit any survey, resource, or reports associated with an ER project. If you did not submit the initial ER project for review through PA-SHARE, please email the PA SHPO helpdesk at [pashare@pa.gov](mailto:pashare@pa.gov) or email PA SHPO project reviewer to add you as a project contact.

### Submitting Negative Survey Reports

If you are submitting a NEGATIVE survey report, you must complete the following steps. These are explained in greater detail in the sections that follow.

1. Respond to the SHPO's Request for Additional Information.
2. Enter Survey Details.
3. Enter Survey Location.
4. Upload the report and any other attachments.
5. Associate all Projects and Surveys.
6. Submit to PA SHPO.



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### Submitting Survey Reports with Sites

If you documented new sites during your survey, **DO NOT** submit reports without PASS numbers. *If you submit a report without first obtaining a PASS number for each newly documented site, the report will be rejected and returned to you. This will delay project consultation.*

If you are updating a previously recorded site that has already been issued a PASS number, enter the updated site data through the Add a Resource tab (see below).

To receive PASS numbers and update previously recorded sites for your reports, please complete the following steps. These are explained in greater detail in the sections that follow.

1. Respond to the PA SHPO's Request for Additional Information.
2. Enter Survey Details.
3. Enter Survey Location.
4. Add each Resource located during the survey.
5. Submit to PA SHPO.

Once PA SHPO has processed the submitted resources (Step 4, above), you will receive a second email from PA-SHARE with another Request for More Information. Once you receive this second email, you can submit the final survey report as outlined in the following steps. These are explained in greater detail in the sections that follow.

1. Respond to the PA-SHPO's second Request for Additional Information.
2. Update the any survey information, if necessary.
3. Upload the report and any other attachments.
4. Associate all Projects, Resources, and Surveys.
5. Submit to PA SHPO.

**NOTE:** If you submit insufficient information, the SHPO will send another Request for More Information to Update the Existing Survey and instructions on what needs to be completed.

The SHPO will have 30 days to review the Report submission. When the SHPO's review is complete, you will receive another email that will have a link back to the SHPO Response page where you will be able to view the SHPO response and/or any letter attachments. Please see guidance on the SHPO Response page for clarification.

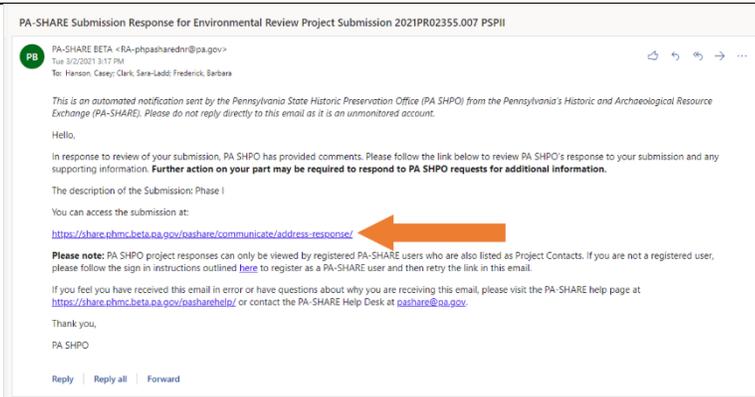


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## Responding to PA SHPO's Request for More Information

There are two ways to access the PA SHPO Request for More Information and begin adding your survey and resource data and uploading reports:

- The PA SHARE Submission Response Email or
- The “My Requests” tab on PA SHARE

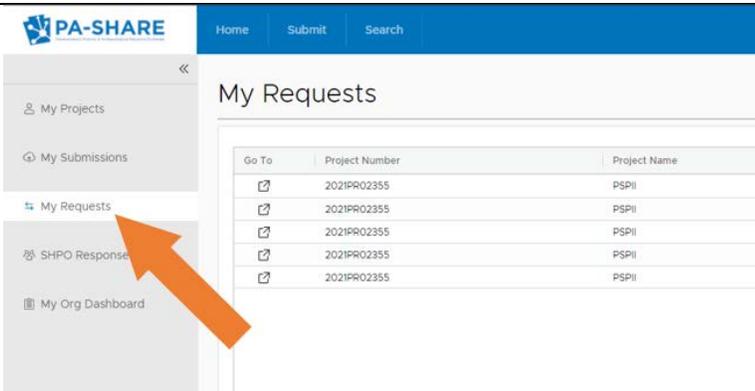


The email to the left is generated when a PA SHPO reviewer requests an archaeological survey.

Click the link in the email and it will take you to the project Response Page.

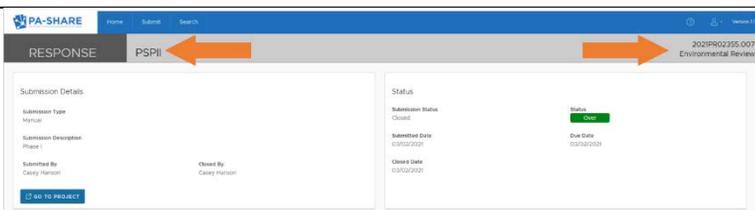
**You must be a Project Contact on the project to receive this email.**

Once you receive the email, click on the link in the email to access the ER submission response.



You can also log into PA SHARE and access our response through the “My Requests” tab on the left side of the page.

This request will remain open until you submit.



When you click on the link in the email or the “My Requests” page you are sent to the SHPO Response Page.

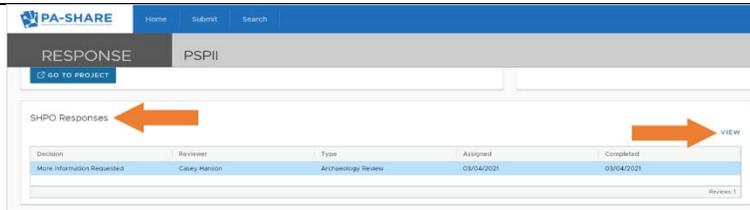
The Project name is in the top left corner next to the RESPONSE header (PSPII in this example). The Project number is in the top right corner of the page (2021PR02355 in this example).

When you scroll down the page you will see four headings



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- SHPO Response
- SHPO Comments
- SHPO Requests More Information
- SHPO Attachments



*SHPO Responses* is the overall (Above Ground and Archaeology) decision on the project submission.

If we have recommended an archaeological survey, you will see “More Information Requested” by the Review Archaeologist in the response grid (highlighted blue bar).

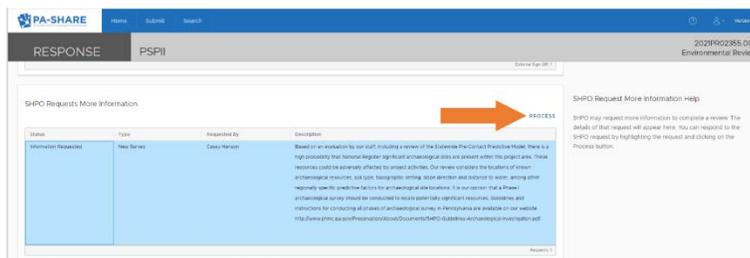
You can view our entire response by highlighting the row in the responses grid and clicking “View” in the top right corner.



*SHPO Comments* are our recommendations for the project. They are typically the responses you used to see in our letters.

Most commonly we recommend surveys for areas with known sites or high probability areas.

If we have specific recommendations for your project, we will attach a letter that you can find under “SHPO Attachments” header at the bottom of the page.



*SHPO Requests More Information* is where you will enter your survey and resource data and upload all reports and report attachments.

To begin entering survey and resource data or submitting a report, highlight the information request in the grid and click “Process” in the top right corner.



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## Entering Survey Details

Once you click “Process,” a window titled “Survey Details” will appear. You will be using this screen to data enter any **NEW** surveys into PA-SHARE.

The screenshot shows the 'Survey Details' form in the PA-SHARE system. The form is titled 'Survey Details' and contains several sections:

- Description:** A text area with a sample text: "Based on an evaluation by our staff, including a review of the Statewide Pre-Contact Predictive Model, there is a high probability that National Register significant archaeological sites are present within this project area. These" and a character count of 135 remaining.
- Survey Type:** A dropdown menu set to 'Archaeological'.
- Survey Name:** A text field with a character count of 400 remaining.
- Survey Description:** A text area with a character count of 1000 remaining.
- Sponsor Type:** A dropdown menu set to 'None'.
- Survey Subtype:** A dropdown menu is open, showing a list of options: 'Choose value', 'Annual Report of Regional Survey', 'Geomorphological Report', 'Geomorphological, Record of Disturbance', 'Monitoring Report', 'Negative Survey, Geomorphological', 'Negative Survey, Monitoring', 'Negative Survey Form', 'Phase I', 'Phase I, Geomorphological', 'Phase I, Monitoring', 'Phase I, Negative Survey', 'Phase I, Phase II', 'Phase I, Phase II, Geomorphological', 'Phase I, Phase II, Phase III', 'Phase I, Phase III', 'Phase I, Record of Disturbance', 'Phase II', 'Phase II, Geomorphological', and 'Phase II, Negative Survey'.
- Help:** Text on the right side of the form: "Please describe the contents of the submission to be reviewed." and "Survey Information Help: Indicate key information about the completed Survey to help categorize and define the Survey coverage in the area of the completed Survey."

At the bottom right of the form are three buttons: 'CANCEL', 'SAVE AND CONTINUE', and 'SUBMIT'.

Before using this screen, understand this information is important to PA SHPO review. Incomplete information may lead to delays in the review of a project. Please respond as completely as possible.

This screen includes several sections:

- description
- identification
- methodology
- location and extents
- previously identified resources
- attachments

Scroll down using the bar on the right side of your screen to see all sections. Please note the following tools for completing this screen:

### Survey Information Help

Indicate key information about the completed Survey to help categorize and define the Survey coverage in the area of the completed Survey.

There is on-screen help for these sections on the right side of the screen.



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Three actions buttons will always be visible at the lower right corner of your screen. They will be anchored here even as you scroll down the screen.

- Cancel allows you to close the Survey Details window/
- Save and Continue allows you to save your work as you go along. NOTE: Your session will timeout after 30 minutes of inactivity and any unsaved changes will be discarded. To ensure information is not lost, we recommend saving the information after each section.
- Submit sends the survey details to PA SHPO when you are finished entering the information.



Those fields required to save a project are marked by a red asterisk. These fields may also be indicated by a red exclamation point in a red circle.

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## Description & Survey Identification

Survey Details



The “Description” text box at the top of the page is auto-filled by the SHPO Request for More Information.

You can enlarge this box to see the full description by grabbing the box in the lower righthand corner and dragging.



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Begin to enter your archaeological survey data by selecting “Archaeological” from the “Survey Type” drop-down list.

Provide additional information about your survey from the “Survey Subtype” drop-down list.

## Survey Details

Survey Name and Description are text boxes.

**Survey Name:** Include the ER Project Name, Project Number, and County. This field is limited to 400 characters.

**Survey Description:** Summarize the survey area, methodology, findings, and recommendations. This should be similar to a report abstract. This field is limited to 1000.

For both text fields, you can cut and paste from a Word or other document using the Ctrl+V command. To expand the text box, grab and drag the lower left corners.

**Sponsor Type:** For most ER projects, please select “Agency” from the “Sponsor Type” drop-down list.

Please select the lead agency from the Agency Sponsor drop-down list if applicable.



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## Date Completed

03/04/2021



Select a date

## Reason for Survey

None

## Description of Reason

1000 characters remaining

**Date Completed:** Date completed is the last day of fieldwork. Enter the date as MM/DD/YYYY or select from a calendar by clicking the calendar icon.

**Reason for Survey:** If the SHPO recommended the survey for an ER project, please select “State or Federal Compliance Project” from the Reason for Survey drop-down list.

**Description of Reason:** This is a text box allowing up to 1000 characters. It refers to our Request for More Information decision (High Probability, Known Sites, or other).

## Survey Details

Methodology \*

Choose value

- Mech. Stripping (New)
- Metal Detector Survey
- Monitoring
- Non Systematic Surface Survey
- Other
- Pennsylvania Site Database
- Pollen Analysis
- Raw Materials Sourcing
- Remote Sensing
- Report/Manuscript, Location Confirmed
- Report/Manuscript, Location Not Confirmed
- Soils Analysis
- Systematic Shovel Testing
- Systematic Shovel Testing, 15 m interval
- Systematic Shovel Testing, greater than 15 m interval
- Systematic Shovel Testing, less than 15 m interval
- Systematic Sub-Surface Testing
- Systematic Surface Survey
- Test Units
- Unknown

SAVE

Methodologies: 0

**Methodology:** To select the methodologies used during your survey, click the “Add a Methodology” button and a Methodology drop-down list will appear.

Choose an appropriate methodology and click the save button.

You may Add multiple methodologies.

The “Methodology Description” and “Comments” are text boxes below the initial methodology field that can be used to elaborate on the survey methodology and/or how the methodologies were developed and utilized in the field.

## Preparer Contact Information \*

**Preparer Contact Information:** Email, first and last name, address, city and zip code are **required**.

To add your contact information, click on the blue icon of a person below the “Preparer Contact Information” heading.

The Edit Contact Information pop-up screen will appear. This screen is identical to other contact information pop-ups on PA-SHARE.



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## Entering Survey Location

**Survey Boundary Justification:** Describe the survey location and details areas where specific methodologies were utilized and/or area that were excluded due to slope, previous disturbance, etc.

**How is Boundary Drawn:** Click on the arrow to open the drop-down list to choose how the boundary was drawn.

**NOTE:** If you uploaded a shapefile, please choose "Imported Spatial Data".

Two tools found in the lower right-hand corner of the mapping screen allow you to map the survey boundary.

Click on the Sketch Widget (pencil) to draw the survey boundary.

**NOTE:** Before you begin editing, we suggest navigating the map to the approximate location of your submission. You can drag the map to pan the geographic extent, use the mouse wheel to zoom in/out, or you can use the +/- buttons to zoom in and out. Further, you can use the search bar in the upper left of the map to navigate to a named location.



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Survey Acreage: 49.42 acres



When you click on the Sketch Widget, it opens a new window to draw the survey boundary. Several map tools will be visible in the lower left corner of the screen.

Please use the **POLYGON** option to sketch your survey boundaries using your cursor.

To start drawing the site boundaries, click on the “Draw a Polygon” icon (a box with a ‘v’ top, indicated by the arrow).

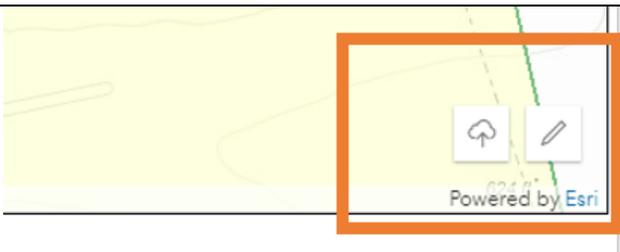
Next, left click on a point on the map to begin drawing the first line.

Drag your mouse in the direction of your next point. Left click your mouse to place the second point and move your mouse in the direction of the next point. Repeat as needed to draw the full survey boundary.

Double click on the last point placed on the map to complete the polygon.

The survey acreage will calculate automatically above the map. In this example it is 49.42 acres.

Municipality and County matrix will be automatically populated below the map.



You can also upload a shapefile of the site boundaries:

First click on the Cloud Icon in the in the bottom right corner next to the Sketch Widget.



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Choose the **Single .zip** file from your computer.

If loaded properly, the map will zoom to the uploaded shapefile location and a 'Success' Message will appear in the bottom right corner.

The survey acreage will calculate automatically above the map. In this example it is 36.70 acres.

Municipality and County matrix will be automatically populated below the map.

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## Adding Resources Recorded in the Survey Area

Please see the tutorial Adding Archaeological Resources (available soon) for step-by-step instructions for adding archaeological resources to your survey.

**Note:** You must add all resources recorded within the survey area and submit the survey record to the SHPO to receive PASS numbers **before** uploading and submitting the final report. Please **DO NOT** submit reports without PASS numbers. *If you submit a report without first obtaining a PASS number for each newly documented site, the report will be rejected and returned to you. This will delay project consultation.*

Add resources recorded within the survey area using this grid.

Click “Add Resource” to begin.

Click on the “Add a Resource” tab.

Select the resource type from the drop-down list of Archaeological Resource types.

Please enter as much site data as possible. A minimum record requires:

- A Mapped Site
- Recorder Information
- Site Type
- Chronological Information

All required data entry areas for a minimum record have a red asterisk next to them and/or you will not be able to submit a resource until these data have been entered.



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Please see the Adding Archaeological Resources tutorial for detailed instructions.

When finished entering the resource data, click “Save and Close” in the bottom right corner.

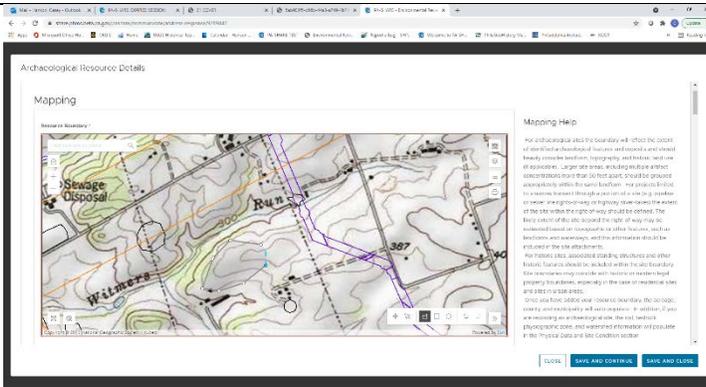
The Archaeological Resource Details page will pop open.

You begin with **MAPPING** the resource.

Mapping a resource is identical to mapping the survey area described above.

Click on the Sketch Widget in the bottom right corner to use the **POLYGON** option to sketch your survey boundaries using your cursor.

Or upload a shapefile of the site boundaries using the Cloud Icon in the in the bottom right corner next to the Sketch Widget.



## Survey Details

### Resources Recorded within the Survey Area

Type	Resource Name	Address	Status	
<input type="checkbox"/>	Archaeological	Unnamed Resource	Unknown Address	Partial

Resources: 1

Once you have completed entering your resource data you are directed back to the Survey Details Page.

Add all resources identified during the survey by repeating the process above. The total number of resources added will show in the lower right corner of the “Resources Recorded within the Survey Area” box.



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Survey Details

## Resources Recorded within the Survey Area

Type	Resource Name	Address	Status
Archaeological	Unnamed Resource	Unknown Address	Partial
Resources: 1			

### Resource Information Help

For each Resource identified or documented in the Survey area, select the 'Add Resource' button and select the appropriate Resource Type. Fill out the required fields on that form. If the Survey did not identify or document any Resources in the Survey area, this grid can left blank.

## Survey Attachments

Attachment Type	Attachment Name	Date Created	Description
No records have been added.			
Attachments: 0			

### Survey Attachments Help

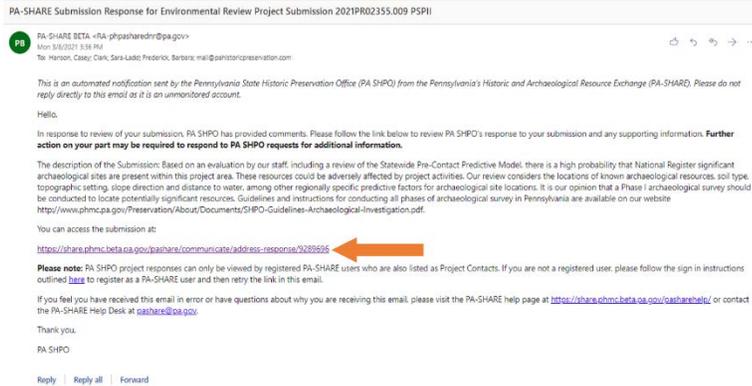
Add any Attachments to this submission which might supplement the Final Report for the Survey below. This may be in the form of unmodified scans of relevant background research such as historical maps, etc.

CANCEL SAVE AND CONTINUE SUBMIT

Once all resources have been added, click "Submit" at the bottom right corner of the page.

## Submitting a Final Report

When the SHPO has processed your resources, you will receive a second email from PA SHARE with another Request for More Information (just like at the beginning of this process). The request will also appear under "My Requests" on your PA SHARE home page.



To Submit the final report, click the link in the Request for more Information email or click on the "My Requests" tab on PA SHARE.

These actions will take you to the project Response Page.



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RESPONSE PSPII

SHPO Comments

Type	Reviewer	Date	Comment	External SHPO Response
Triage	Sara-Ladd Clark	03/08/2021	Resource Added	Thank you for providing us with this resource information. It has been added into our inventory with the PASS # 36AL0764 (SHPO Resource # 2021REC005).

SHPO Requests More Information

Status	Type	Requested By	Description
Information Requested	Update Existing Survey	Sara-Ladd Clark	Your PASS # has been assigned as 36AL0764. Please provide the final version of the survey report for review.

PROCESS

The SHPO Request for More Information type has been updated to “Update Existing Survey”.

You will also see that a PASS number was assigned and is noted in the description in the response grid.

You can also access the PASS number from the Project and Survey pages.

RESPONSE PSPII

SHPO Comments

Type	Reviewer	Date	Comment	External SHPO Response
Triage	Sara-Ladd Clark	03/08/2021	Resource Added	Thank you for providing us with this resource information. It has been added into our inventory with the PASS # 36AL0764 (SHPO Resource # 2021REC005).

SHPO Requests More Information

Status	Type	Requested By	Description
Information Requested	Update Existing Survey	Sara-Ladd Clark	Your PASS # has been assigned as 36AL0764. Please provide the final version of the survey report for review.

PROCESS

Highlight the request by clicking on the grid and click “Process” in the top right corner.

Survey Details

Survey Attachments

ADD AN ATTACHMENT VIEW EDIT DELETE

Attachment Type	Attachment Name	Date Created	Description
No records have been added.			

Attachments: 0

The Survey Details window that you worked in previously will open.

You may update most fields if needed.

Survey Attachments are supplementary documents that can assist the reviewer.

Add an attachment by clicking “Add an Attachment” button and following the directions on the screen.

You can add as many attachments as needed, but **do not attach the report in this location.**

Survey Reports

ADD A NEW REPORT VIEW EDIT DELETE

Report Title	Date	Author
No records have been added.		

Reports: 0

To upload the final survey report, click “Add a New Report” and the Report Details window will appear.



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## Report Details

Enter report title, date, author, author organization and abstract into the text boxes.

You can copy and paste from a Word document using the Ctrl+V function.

Remember to click on the box next to “Is Archaeological” if the report is for an archaeological project.

## Report Details

Click on “Add a New Report Type” to select the report type. You add multiple report types as needed.

Click on the “Add an Attachment” tab to upload the report.

**NOTE:** If your report is over 70mb, please break it into sections and upload more than one attachment. You can upload as many attachments as needed.



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## Report Details

The screenshot shows three sections in the Report Details page:

- Associated Resources:** A table with columns 'GoTo', 'Number', 'Name', and 'Type'. It shows one resource: 2021RE00151, Site 1, Archaeological.
- Associated Surveys:** A table with columns 'Name' and 'Type'. It shows one survey: Phase I PSPI, Archaeological.

The last three sections of the report details page include:

- Associated Project (PR)
- Associated Resources (RE)
- Associated Surveys (SR)

These fields ensure that your Report file (RP) is linked to the correct Project (PR), Resource (RE) and Survey (SR) files. At this point your Project, Resources, and Surveys are already linked through the processes carried out above.

By associating your report to these files, all data will be linked.

To associate a Project, Resource, or Survey, click on the appropriate button and a Search box will open.

## Project Association Search

The screenshot shows the Project Association Search form with the following fields and annotations:

- Project Type:** A dropdown menu with 'Choose value' selected. An orange arrow points to the 'SEARCH RESOURCES' button below it.
- Project Num:** A text input field with 'Project Num' and '255 characters remaining'.
- Project Name:** A text input field with 'Project Name' and '255 characters remaining'.
- Help:** Text that says 'Use the search options provided to identify a Project to associate.'
- Search results:** A table with columns 'Type', 'Status', 'Number', 'Name', and 'Created'. It currently displays 'No projects found.' An orange arrow points to the 'SAVE' button below the table.

This example shows the Project Association Search. The same fields and search process is also used for Associated Resources and Associated Surveys.

You can search by choosing an option from the “type” drop down menu and entering the name or number already assigned to you.

Click “Search” and the results will appear in the grid below. Click “Reset” to clear the search fields.

Highlight the appropriate Project, Resource, or Survey in the results grid and click “Save”.

**NOTE:** You can also find all PR, RE, and SR file numbers associated with the Project on the original Project Page under the Resources and Surveys Tab in the top left corner between Summary and History.



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## Report Details

GoTo	Number	Name	Type
	2021R02355	PSPI	Environmental Review

Projects: 1

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Associated Resources

ASSOCIATE A RESOURCE DELETE

GoTo	Number	Name	Type
	2021R00151	Site 1	Archaeological

Resources: 1

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Associated Surveys

ASSOCIATE A SURVEY DELETE

Name	Type
Phase I PSPI	Archaeological

Surveys: 1

CANCEL SAVE

Once you have associated all the appropriate Projects, Resources, and Surveys, the grids on the Report Details screen will show these the results of those associations.

Click "Save" in the bottom right corner.

**NOTE:** You must have at least one attachment for it to save.

VIEW

Author
Reports: 1

CANCEL SAVE AND CONTINUE SUBMIT

You will go back to the Survey Details screen.

If you have no more information to update on the Survey Details Screen, click on the Submit button in the bottom right corner.

## SHPO Requests More Information

Status	Type
Completed	Update Existing Survey

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### SHPO Attachments

Attachment Type	Attachment Name

Once you have submitted, you will go back to the Response Screen.

You will notice that the Status of the PA SHPO Request for More Information has been changed to "Completed."

You will also receive an email when your Report has been processed for PA SHPO review.