CRIS
NYS
Cultural Resource Information System

Step-by-Step Instructions for CRIS Data Entry for Independent Survey

NEW YORK STATE OF OPPORTUNITY. | **Parks, Recreation and Historic Preservation**

Division for Historic Preservation

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First, go to the CRIS splash page at https://cris.parks.ny.gov. Click the **I Agree** button after reading the CRIS Legal Disclaimer. Next, click the **Sign In** button and enter your NY.gov ID username and password. If you do not have an NY.gov ID, you may create a personal account by clicking the **Sign Up Now** button. (Be sure to use the email address at which you plan to receive SHPO correspondence.)

Once you have entered the CRIS website, click **Submit** in the top navigation bar (between **Home** and **Search**). On the Submit page, click the **Independent Survey** link and then click the **Start** button on the right.

IMPORTANT: It should be noted that this process should be used only when a survey was conducted independent from a SHPO consultation project. Surveys that were performed as part of a consultation project should be submitted as part of that project. An independent survey submission will create a new project with SHPO.

There are two types of surveys that can be submitted:

- **Building Survey** - This survey identifies buildings, structures and objects (above ground resources) within a specified survey area.
- **Archaeology Survey** - This survey identifies archaeological sites (below ground resources) within a specified survey area.

The Independent Survey wizard leads the user through the submission of a building survey, archaeological survey or both. The wizard begins with two general steps prior to launching users into a sub-wizard to enter the survey data.

Step 1: **Contact Information**— You are required to enter your name, city, state, ZIP code, and email address; you may also fill in the remaining fields. (NOTE: This is NOT necessarily the person who CONDUCTED the survey. The person who conducted/prepared the survey is entered within the survey details itself in a later step). Click the **Next** button to submit your contact information. You will then be alerted that CRIS has emailed you a unique 12-character token (such as *ABC123DEF456*) for this particular submission that will allow you to return to the submission for additions or editing. You may continue with Step 2 of the wizard by clicking **OK** in the token alert.

A description of each data item/control presented on the form is below.

Item	Description
Salutation/First Name	Select the appropriate salutation (Mr., Mrs., Ms., etc.) from the drop down list and enter a first name associated with the contact.
Last Name	Enter the last name for the contact.
Title (Optional)	Specify the title associated with the contact. This step is optional.
Organization (Optional)	Enter the name of the organization with which the contact is affiliated. This step is optional.
Address 1	Enter the street address for the contact.
Address 2 (Optional)	Enter the second part of the street address associated with the contact, if applicable. This step is optional.
City	Enter the appropriate city name.
State	Enter the appropriate state abbreviation.

ZIP	Enter a ZIP code.
Primary Phone (Optional)	Specify a primary phone number where the contact can be reached. This field is optional.
Alternate Phone (Optional)	If applicable, specify a secondary phone number for the contact. This field is optional.
Fax (Optional)	Provide a fax number. This field is optional.
Email	Enter a valid email address for the contact.
Confirm Email	Renter the valid email address previously entered to validate it for consistency.

Step 2: Surveys—Select **Building Survey Only** from the dropdown menu, then click the **Launch Building Survey Wizard** button to open the Building Survey Wizard.

1. The Building Survey Wizard will prompt you to enter the survey's **Preparer Information**. This form is similar to the Contact Information step you have already completed. If the preparer of the survey is the same as the contact entered in the Contact Information step, click the **Copy Submitter Details** button to automatically enter their information. When all contact information for the preparer has been entered, click the **Next** button.

2. Next, you will need to provide **Survey Details**. Please be as specific and comprehensive as possible when completing. Required fields on the form are marked with an asterisk.

> *Note:* For larger surveys that include hundreds of properties, we recommend sending phased submissions to SHPO. So, for example, you may call subsequent submissions *[Name of Area] Survey 1.1*, *1.2*, *1.3*, and so forth. Each new submission, even in the same municipality/neighborhood, will require the boundary to be redrawn.

Complete the information on the form and click the **Next** button when done.

A description of each data item/control presented on the form is below.

Item	Description
Type of Building Survey	Use the drop-down to select the type of survey (Reconnaissance, Intensive, Context Study, Other)
Survey Title	Enter the title of the survey/report as it should be referenced throughout the process
Date Completed	Date the survey was completed
Certified Local Government Funded	Was this survey certified local government (CLG) funded? Select **Yes** or **No.** If this is unknown,

	select **No**.
Number of Properties Inventoried	Enter in the number of properties inventoried during the survey. A numeric value must be entered.
Sponsor (Optional)	Enter the name of the survey sponsor (if applicable).

3. Enter a description of the **Survey Area**. (You may type or paste text in this and other fields.) If the survey area is bounded by certain streets, include this information in the description. To zoom the map to the vicinity, select the county and municipality and click the **Zoom** button.

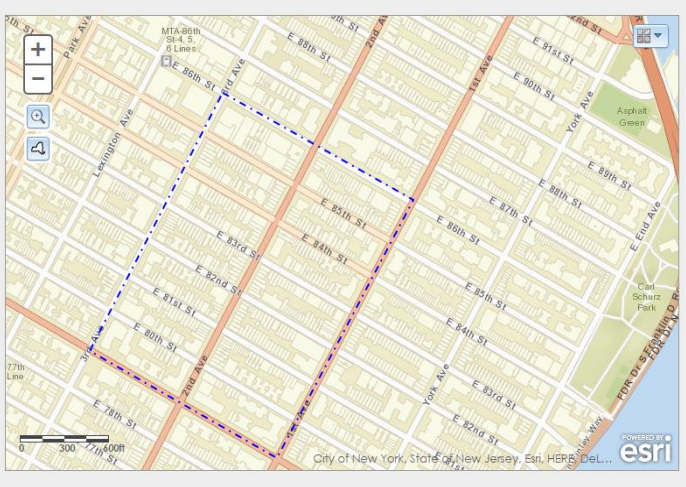Click the **Start Drawing** button to begin drawing the survey area boundary on the map. To set the first corner or point of the boundary, click once on the appropriate location on the map. A red line segment will follow your cursor to the next point, which you may set by clicking once at the desired location. Continue setting points along the boundary.

You may zoom in or out while drawing by using the mouse's scroll wheel or by clicking the **+** and **–** buttons in the upper-left corner of the map. You may also pan the map by clicking, holding, and dragging within the map; a point will not be set until you release the mouse and click the next point location. To switch the basemap (such as for viewing aerial photography or topography), click the dropdown tool in the upper-right corner of the map.

You do not need to bring the cursor back to the first point to close the boundary. When you reach the final point location on the boundary, simply double-click to close the boundary. A line segment will connect the final point with the first point you drew. After you double-click to stop drawing, the polygon will show up in a blue dashed line.

Although a boundary cannot be edited once drawn, if you need to make changes, you may click the **Start Drawing** button to redraw the boundary. Once you have completed the boundary drawing, click the **Next** button.

> *Note:* We recommend organizing the resource survey information by municipality or neighborhood boundaries. If the survey is municipality-wide, you will need to draw a boundary following the municipal lines, which are identified by dashed lines on the **Topographic** basemap. For a neighborhood within a municipality, draw the boundary line according to the streets surveyed.

4. For the **Districts and Resources** step, select *Yes* or *No* from the dropdown menu where it asks if there are **any proposed historic districts identified**.

If you are entering a proposed historic district, click the **Add District** button. The map will zoom to the survey area you drew (shown as a red dashed line). Click on **Start Drawing** to draw the district boundary (Note: it is often helpful if the base map on the map display is changed to "Imagery" to view the actual building and landscape while tracing). Position the mouse over the map display (a tool tip "Click to Start Drawing" is displayed next to the mouse cursor) and click a series of points outlining the boundary and then double-click on the last point to finish and close the boundary. As you click each point, the district boundary lines will appear in a light color. After you double-click to stop drawing, the boundary will change to a blue dashed line. Next, enter a name for the proposed historic

district and describe its boundaries. Click the **Next** button to proceed to **District Details**.

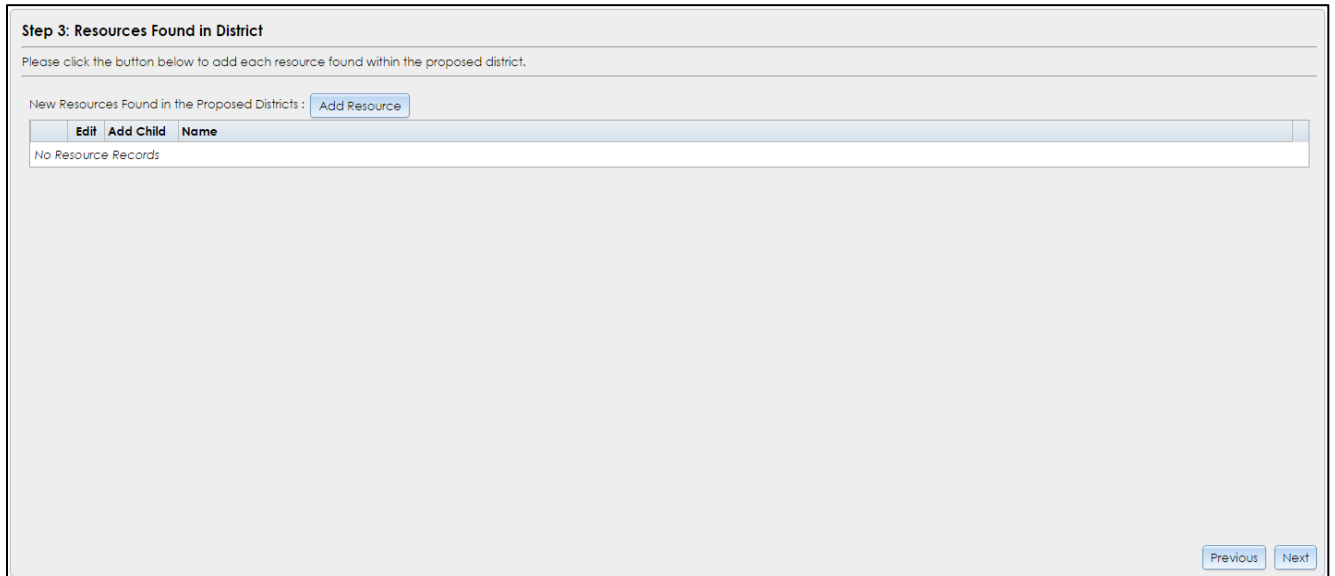Enter the **District Details** by completing the following fields: **Number of Properties**, **Brief Description of District**, **Summary of Significance**, **Boundary Justification**, **Sources/Bibliography**, **Sponsor** (if applicable), and **Periods of Significance**. (You may add multiple periods of significance.) Click the **Next** button to proceed to the **Resources Found in District** step.

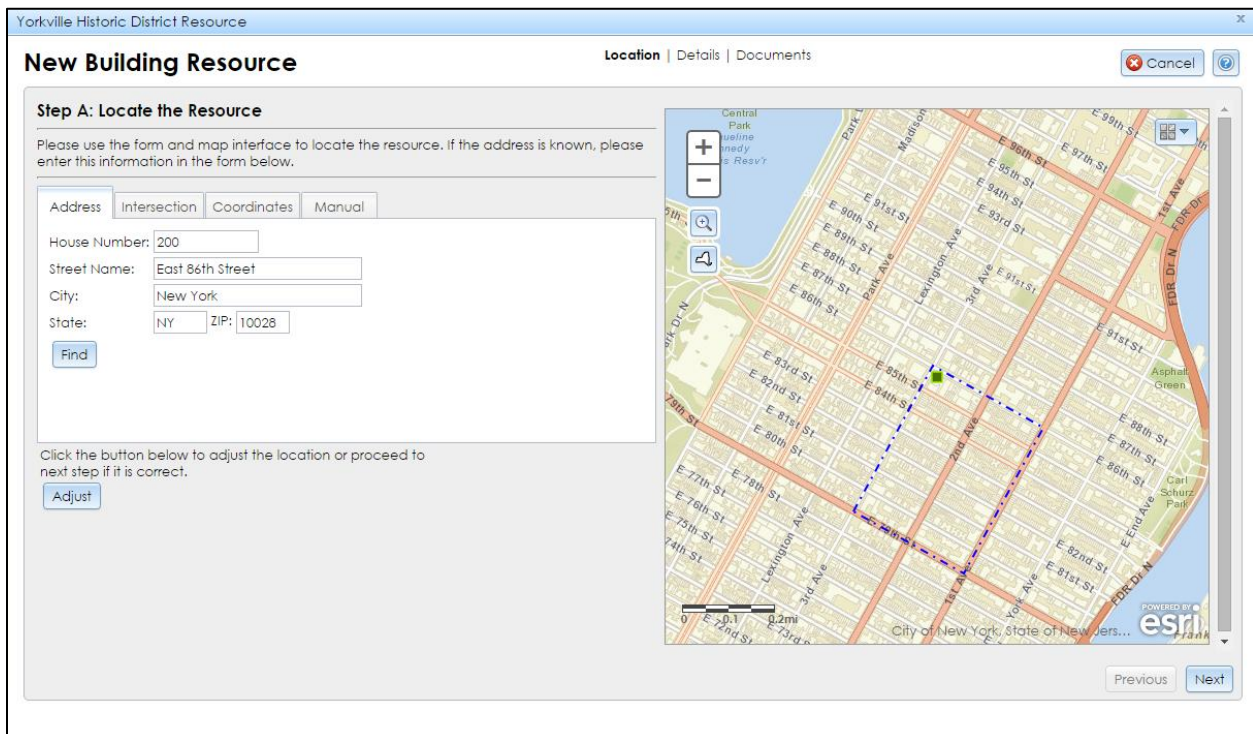A description of each item/control presented on the form is below.

Item	Description
Number of Properties	Enter the number of properties within the proposed district. This must be a numeric entry.
Brief Description of the District	Enter a brief description of the district, including a summary of the general physical characteristics including prominent natural and built features, and a discussion of the surrounding environment. Describe general building types and architectural styles represented, as well as the general condition of properties, extent of alterations, additions or rehab activities present. Include any significant objects, structures or sites which contribute to the overall character of the district.
Summary of Significance	Enter a **concise** summary of the historic significance of the district. Include descriptions such as: factual historic overview of the district, including the events and themes of history that are reflected; how the district physically reflects its period or sense of place; why the district is important to the community.
Boundary Justification	Provide a description of the boundaries of the district and discuss the qualities that distinguish the district from its surroundings
Sources / Bibliography (Optional)	Provide a bibliography of any books, article, maps or other documents which contain information about the district. Please include author, title, place of publication, publisher and date of publication when known. Include the repository for unpublished materials or hard-to-find publications.
Sponsor (Optional)	Enter any sponsors/sponsoring organization.
Periods of Significance (Optional)	Enter any periods of significance for the district (i.e., in what period(s) of history did the district become important). Enter an approximate date range (e.g., 1920-1930) in the text box provided and click the add button (plus sign). Multiple entries can be added.

Click the **Next** button to proceed to the **Resources Found in District** step.

Enter each resource in the proposed district one at a time by clicking on the **Add Resource** button. The Add Resource sub-wizard will open each time at **Step A: Locate the Resource**.

You may locate the built resource by searching an address, intersection, or coordinates. If you use coordinates, select *WGS84 (Lat/Lon)* from the **Coordinate System** dropdown menu. Enter the X (longitude) and Y (latitude) coordinates as decimal degrees (such as *-73.680953* and *42.784750*, respectively).

When you click the **Find** button, the geocoder will locate the resource with a green point on the map. Select the **Imagery** base map from the dropdown tool in the upper-right corner of the map. Use the mouse's scroll wheel or the **+** and **–** buttons on the map to zoom to the resource point to verify that it is at the correct location.

The resource point should be centered on the rooftop of the building. If you need to move the location point, click the **Adjust** button and then click the center of the resource's rooftop on the map; the point will move to the rooftop.

If you have street address information (number, ZIP code, etc.), you may add it to the appropriate fields under the **Address** tab after you have plotted your GPS coordinates. Partial addresses are acceptable, but complete addresses, including ZIP Code, will substantially increase the results accuracy.

Once the coordinate point is centered on the resource and address information is entered (if available), click the **Next** button to proceed to **Step B: Resource Information**.

Under the **Required** tab, the fields to be entered include the following:

Item	Description
Resource Type	Specify the appropriate resource type by making a selection from the **Resource Type** drop down list. Options include Building, Structure, Object and Site.

Last modified 11/20/2015

	(Examples: Bridges = Structure, Monument = Object, Botanical Garden, Battlefield, Cemetery - Site)
Enter the Property Name	Enter a descriptive name for the property if it is known by a name other than the address (e.g., John Doe School, ABC Church). ; If there is no known property name, enter a generic name such as *House at 140 Main Street*.
Year of Original Construction	Enter the year of original construction. Note: this is a text field that can be used to enter a textual description to provide an approximate date (e.g., circa 1800, mid-19th century, etc.).
Number of Residential Units	Enter the number of residential units at this location. If it is a commercial building, enter 0.

Select *Yes* or *No* to indicate whether there are any outbuildings or landscape features associated with the property. If *Yes*, click the **Add Outbuilding** button and select the appropriate option(s) from the list and enter the quantity of each outbuilding type.

Click the **Add Current Use** button in the **Required** tab and select the appropriate option(s) from the use category list. You may type in a category or current use example to filter the list instead of scrolling through the complete list. You may select multiple use categories if applicable.

Under the **Comments** tab, enter any brief additional comments about the resource. We recommend that you enter the proposed eligibility and USN number in the comment box. Make sure that the USN number is in the format *06101.012345*, with leading zeroes if applicable. *The correct USN format is very important for reference purposes.*

Under the **Supplemental** tab, enter any relevant historic information, such as the property name, historic uses, architectural classification, architects/builders, etc. In most cases, a reconnaissance-level survey will not require this information. *This information will be required for the Intensive Level Survey only.*

Descriptions of each field on the supplemental tab are listed below.

Item	Description
Historic Property Name	Enter the historic property name
Former Address	Enter the former address if it has changed. This might be the case for addresses acquired before E-911 addressing was implemented, or if a building was physically moved.
Former Municipality	Enter the former municipality if it has changed. This might be applicable if the previous municipality was merged with another.
Former ZIP Code	Enter the former ZIP code, if applicable.

Add Historic Uses	Enter any Historic Uses information you may have by clicking the **Add Historic Use** button. In the new window that opens, select an available option. Note that you can also filter through the options by entering a search term in the **Filter Records…** field near the top of the window. In the lower left you will see a grid of **New Historic Uses** that you have just added. Click the red X button to remove these from the table, if needed. Optionally click the **Cancel** button to dismiss the dialog without saving any changes. If you have entered a historic use click **Save** to move on.
Description	Enter a description of the current physical attributes of the property.
Parcel ID (Block/Lot)	Enter the Parcel ID, SBL, or Block and Lot information
Architectural Classifications	Enter any architectural classifications by clicking the **Add Architectural Classifications** button. In the new window that opens, select one or more available options. Click **Save** to move on.
Foundation Materials	Click the **Add Foundation Material** button to enter foundation materials information. Make one or more selections in the new window that opens and click save to continue.
Wall Materials	Click the **Add Wall Material** button to enter foundation materials information. Make one or more selections in the new window that opens and click save to continue.
Roof Materials	Click the **Add Roof Material** button to enter information. Make one or more selections in the new window that opens and click save to continue.
Other Materials	Click the **Add Other Material** button to enter information. Make one or more selections in the new window that opens and click save to continue.
Major Alterations	Click the **New Alteration** button to describe the alteration and specify an alteration date in a new window that opens. Note that the date field accepts text characters such that you can give a general idea of when the alteration was made (e.g., around 1970). Click **Save** to save the alteration information. Repeat as needed.
Architects/Builders	Manually enter a name or description of the Architect/Builder and then click on the add button. The entry will show up in the

	Architect/Builder table.
Brief Description of the property's significance	Enter a description of the property's significance
Sources	Enter any source information for the above information
Area of significance	Enter information about any areas of significance at the location. Click the **Add Area of Significance** button and make selections as needed. Click **Save** when ready to move on to the next section.
Periods of Significance	Describe the period of significance in text and click the add button. Repeat as needed.
Significant Dates	Describe the significant date and click the add button. Repeat as needed.
Significant Persons	Describe the significant person and click the add button. Repeat as needed.
Cultural Affiliations	Describe any cultural affiliations of the resource and click the add button. Repeat as needed.

Click the **Next** button to proceed to the **Photographs and Attachments** step. Under the **Photos** tab, enter each photograph's **Title** (use the Property Name), **Description** (e.g. *Façade facing east*; *West elevation*), and **Date of Photo**, then select *Exterior* or *Interior*. Select each photograph by clicking on the **Browse** / **Choose** / **Choose File** button (wording depends on the browser). After choosing the file, click the **Upload Photo** button to add it to the list of photographs.

> *Note:* For each resource recorded, we recommend entering *up to 3 photographs* in JPEG or TIFF formats. With most resources surveyed, this should suffice. In addition, this will make information/photographs upload less cumbersome. There is also a size limit of 30 MB per file for photographs and attachments.

If there is a resource that is determined to be historically significant and eligible for the National Register by SHPO, you may enter additional photos for the resource in the intensive survey submission(s).

You may upload the individual property survey form as a PDF under the **Attachments** tab. If you have no attachments to upload or URLs to reference, click the **Done** button to move on.

After all the photographs and attachments have been uploaded, click the **Done** button to complete the Add Resource process and return to **Step 3: Resources Found in District**. You may enter additional resources by clicking the **Add Resource** button and following Steps A through C as described above. If you have finished adding all the resources for the district, click the **Next** button to proceed to **Step 4: District Photos**, where you may enter district-level photographs (such as general streetscapes) or attachments. (Do *not* upload your survey report at this step.) Click the **Done** button to return to the Building Survey Wizard at **Step 4: Districts and Resources**.

STOP! If you want to continue entering additional resources outside of the proposed district(s), you may do so here by clicking the Add Resource button to add the location, details and attach documents for the resource. A sub-wizard opens to walk you thought the 3-part process of entering the built resource information: (A) locating the resource, (B) entering characteristics of the resource, and (C) uploading photos of the resource. If you are finished with your daily submissions of resources, then move to Steps 5 and 6.

5. At the **Report Documents** step, upload the survey report(s) for the municipality, neighborhood, etc.

    Files that are large must be divided into multiple files as the maximum file size is 30mb.

    Note: If a large survey report is 80mb in size, please break the file into a minimum of 3 "volumes" no larger than 30mb each in size, and upload each "volume" as an individual file in this step. This will insure a reasonable access time when users are attempting to download/view the report in the future.

    For each document, enter the **Name/Title** and select the file by clicking on the **Browse** / **Choose** / **Choose File** button (wording depends on the browser). After choosing the file, click the **Upload Attachment** button to add it to the list of report documents. After all uploads are complete, click the **Next** button to proceed to the **Summary** step.

6. This final step of the building survey wizard shows a summary of all information entered, by step, and provides a way to make changes to the information presented. If any information needs to be edited, the user can return to the desired step by clicking on the correct step button to open the wizard at the necessary location. Alternately, you can click the **Previous** button to navigate to the step that needs to be corrected. Once you have reviewed the **Summary** section, click the **Done** button to save the survey and return to the Independent Survey wizard at **Step 2: Surveys**. If you want to continue adding resources at this point, you may launch the Building Survey Wizard and proceed to **Step 4: Districts and Resources** as described above.

If the survey data is not ready to submit to SHPO, click the **Save Survey(s) and Exit** button. You will be able to access the survey again for review and edits. To do so, click the **Continue/Edit an Existing Submission** link on the **Submit** page. Your previously saved information will be available for editing. (To add more resources, proceed to **Step 2: Surveys**, click the **Launch Building Survey Wizard** button, and proceed to **Step 4: Districts and Resources**.)

Once you are ready to submit the survey to SHPO for review, click the **Save and Submit to SHPO** button.

After SHPO reviews and processes the Independent Survey submission, they will provide comments and send a request for more information. This could simply be to continue with a follow-up survey or to add a photograph or attachment to a previously identified resource. An email containing a link to the SHPO response will be emailed to the survey contact/preparer with a subject line in the format *SHPO Submission Consolidated Response for Project: 15PR01234.*

Click or browse to the link in the response email, which has the format https://cris.parks.ny.gov/?type=CR&id=ABC123DEF456. Once you've signed in or proceeded as a guest, the consolidated response page should display. If not, click

Communicate in CRIS's top navigation bar, then click the **View and/or Address a Response** link in the Communicate menu. Paste the 12-character response token in the text input and click **Start** to open the consolidated response page. (The response token is different from the original submission token, and is in the email at the end of the text *Please log into the CRIS web portal to view a Consolidated Response for submission- (ABC123DEF456)*.)

If desired, click the **View Project** button in the upper-right corner of the response page to open the project details.

>   *Note:* You may access the Independent Survey Project Details at any time, even before SHPO sends a response. If you have a NY.gov ID account, you may open the project details by the clicking the project's **View** (magnifying glass) button in the **My Projects** tab in your dashboard (on the **Home** screen of CRIS). If you are using CRIS as a guest, you may open the project details by doing the following:

>   1. Click or browse to the following URL: https://cris.parks.ny.gov
>   2. At the CRIS Legal Disclaimer, click **I Agree** to proceed.
>   3. Click **Proceed as Guest** to open the guest interface.

4. Under **Find My Project**, select **I know my Submission Token**.
5. Paste the 12-character submission token in the **Token** field.
6. Click the **Search** button (just below the **Token** field). If the submission has been accepted by SHPO, the project details should open within a few seconds. If acceptance of the submission is still pending, the message "Either the project was not found or the submission has not yet been processed" will pop up.

On the response page, click the **Process** wheel in the **Information Requests** box (below the **Review Responses** box). This will open a new Independent Survey submission, which you may complete similar to the initial survey submission.

IMPORTANT! To update existing USNs identified in a previous survey, proceed to **Step 2: Survey Details** of the Building Survey Wizard. Select *Yes* to the question **Is this survey a continuation of a previous survey?** and select the appropriate survey from the dropdown menu that appears below this question. After you complete **Step 3: Survey Area**, a new step (**Step 3.5: Existing USNs**) will allow you to submit changes to existing USN records. *This step will save you the effort of filling in previously submitted USN data.*

If you have questions while using CRIS, please contact the CRIS Help inbox at CRISHelp@parks.ny.gov.