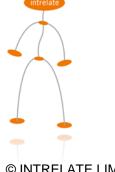


# **Training Manual**

For Electofishing Database, Scottish Fisheries Co-ordination Centre (SFCC)





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# 1 Version History

Version	Date	Author	Status	Reason for Change
0.1	23-Nov-2009	Ann Marie Maclean	Draft	Initial Version
0.2	15-Mar-2010	Ann Marie Maclean	Draft	Updates
1.0	19-Mar-2010	Jennifer Davidson	Approved	Approved version
1.1	1-Jun-2010	Ann Marie Maclean	Draft	Updates
2.0	20-Apr-2011	Jennifer Davidson	Approved	Updates following minor changes to the system

# 1.1 Changes Since Last Version

#### Version 0.2

- 2.3.2 Indicate that wildcard search does not work on numerical fields
- 5.8 Include acknowledgement for Zippin/Carle & Strub code

#### Version 1.1

- 2.3.2 clarification added that criteria can be added into any search field
- 7.1.1 added text to clarify that criteria set in a profiler performs an OR search

#### Version 2.0

• Updates to include Other Fish Species Count tab and extra field added to Individual Fish Measurement for fish length >249.

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#### General System

#### 1.2 Welcome

This training document is provided to help you familiarise yourself with your Electrofishing Database system.

#### 1.2.1 Logging In

You can visit the application by entering the URL for the site into your web browser. You will then be prompted to login to proceed. If you have not been provided with appropriate credentials to access the application, please contact your Line Manager.

To proceed, enter your username and password.

#### 1.2.2 Logging Out

When you have finished working within the system, you are encouraged to log out the system to prevent unauthorised users from access confidential data. To log out, simply click the <u>Logout</u> link in the top right corner of every page. You will then be returned to the login screen.

# 1.3 Homepage

When you have logged into the application, you will be shown your homepage. This page contains all the links to the various tasks you can perform. The page is divided into three panes; left, right, and centre. The left and right panes are further divided into task boxes, which group any related tasks together.

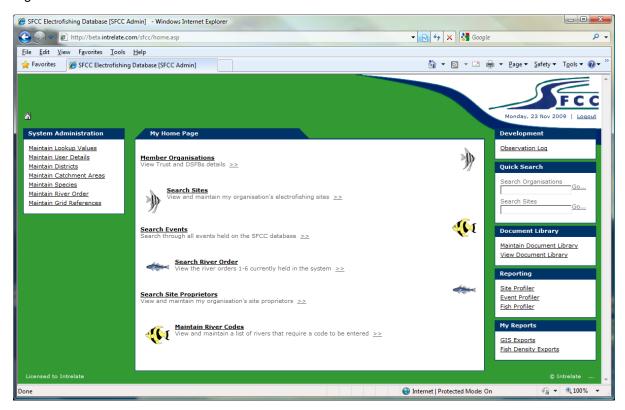


Figure 1 - A typical homepage view

You can access the homepage from other pages in the system by clicking the house symbol above the left pane.

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#### 1.4 Basics

There are several important features and concepts which are used throughout the application. Learning to use these features will help you use the application more effectively.

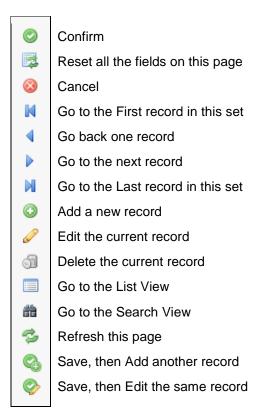
#### 1.4.1 Toolbar

The toolbar is displayed whenever the software requires your action or input, and is found at the top left hand corner of your screen.



Figure 2 - The toolbar

You can use the buttons on the toolbar to work with the system. Please note that not all buttons are displayed all the time, for example the "Add" button may not appear if you are not permitted to add a new record.



#### 1.4.2 Search

A search view is displayed when you need to identify and return a specific element from within the application. This element may be a Site, Contact or any other searchable object defined in the application.

A typical search view will have several fields which allow you to specify the criteria you want to use to find the object(s) you want. If you define more than one criterion, the application will apply all the criteria specified to narrow down your results. For example, if you search for a Site Proprietor with a surname of "Smith", and you specify a forename of "John", the application will only return those Individuals with that surname AND that forename. Any of the fields can be populated.

You can perform an empty search by entering a percent (%) sign into non-numeric textbox Search fields. This will return all the records.

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If the field you are using to search for is a date field, you can specify an exact date or a date range. To specify a specific date, either use the calendar popup, or by typing manually (in the format "DD/MM/YYYY"), to enter a date into the *first* date box. To specify an inclusive range of dates, enter the starting date in the first date box and the ending date in the last date box.

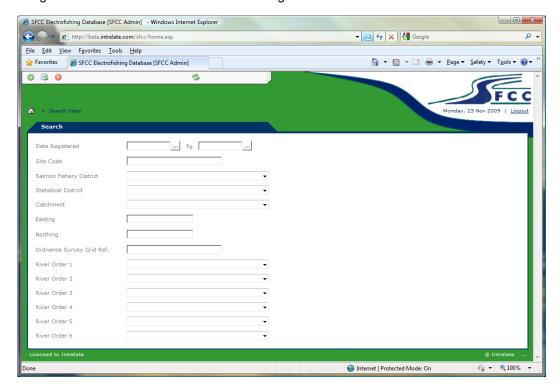


Figure 3 - A typical search page

Once you have entered your criteria, click the "Confirm" icon in the toolbar. You will then be taken to a list view.

You can run a Quick Search directly from the homepage by using the "Quick Search" fields. "Search Organisations" search compares the entered text to the name of a company and "Search Sites" compares the entered text to the Site Code of a Site. Any records which match the entered text will be returned once the <u>Go...</u> link is clicked.



Figure 4 - Quick Search

#### 1.4.3 List

You are presented with a list view when you (or the application) have defined a list of data you wish to have returned. This may be through a Search view, or by a specific task on the homepage (such as <u>Search Sites</u>). From the list view you can select which record you wish to view in more detail by clicking the underlined text identifying that record (if there are no underlined links, you do not have permission to view any more detail).

You can return to a Search view from the List view by clicking the "Search" icon on the toolbar.

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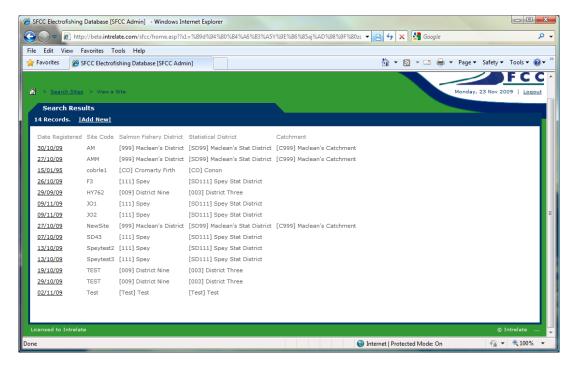


Figure 5 - A typical list view

#### 1.4.4 View

Once you have selected a record to view in more detail, you will be shown a new screen with columns of information at the top, and sometimes one or more tabs below. You can click on these tabs to navigate to different sections of information relevant to the information displayed above.



Figure 6 - A typical series of tabs

#### 1.4.5 Tabs

Tabs are used to show information related to a specified record without having to browse elsewhere in the application. A "parent" record may have one or more "child" tabs. Similarly, a child tab may have tabs of its own.

There are three different types of Tabs you may encounter throughout the Electrofishing database.

#### These are;

- **Groupings** Additional fields related to the parent record (and to each other) may be grouped together into a new tab.
- Child List Where a parent record may have more than one related element, the child tab will show a List view. For example, a Site may have more than one Contact associated with them, in which case their "Contacts" tab would show a list of all that Site's Contacts.
- Document A document tab is a special type of tab which lets you upload and attach
  documents to a specific record. Clicking <u>Add Document</u> will display a window which will allow
  you to select a file from your local computer, using the "Browse" button.

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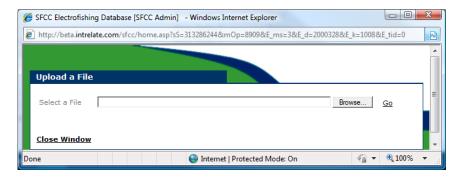


Figure 7 - Upload document

Once you have selected the appropriate document, click on <u>Go</u> to upload it followed by <u>Close</u> Window. The document will then appear in the 'Documents' tab.

#### 1.4.5.1 Toolbar Focus

If you have opened a record which has at least one child tab, the toolbar needs to know which record you are performing an action on. By default, the toolbar will assume you are referencing the parent record. If you want to perform a toolbar action on a child tab, simply click anywhere within that tab. The toolbar will update with context specific changes to show you what your permissions are for that tab. For example, you may be able to add new parent records, but only view elements in a child tab. In that case, the "Add" button on the toolbar will appear and disappear as necessary.

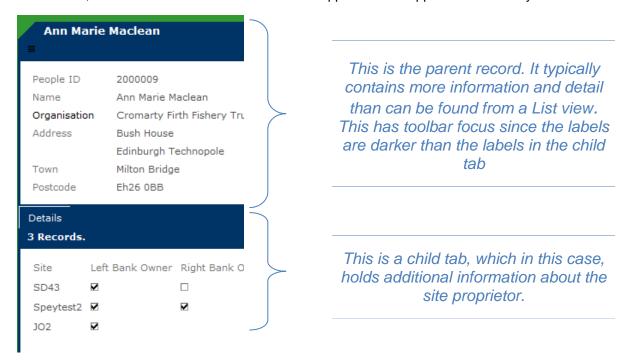


Figure 8 - A typical view with child tabs and parent with toolbar focus

#### 1.4.6 Adding Records

Before you can add a new record to the system, you must have sufficient permissions to do so. If you have the ability to add a new record to the result set you are currently viewing, there will be an "Add" button on the toolbar, and an |Add New| link in the frame of the record.

To add a new record into the system, use the tasks on the homepage to find the area of the system you wish to add a record to. For example, if you wish to add a new Member Organisation, you can click on the <a href="Member Organisations">Member Organisations</a> task. You are encouraged to search the application before you add any new records to avoid duplication. Once you are sure the record does not exist, you can add it

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by clicking either the <u>Add New</u> link, or the "Add" button on the toolbar. You must save or discard your changes before you can proceed elsewhere.

#### 1.4.6.1 Mandatory Fields

Mandatory fields are fields which *must* be completed before the record can be saved. A mandatory field is denoted by an emboldened label for that field. Attempting to save a record without entering all the mandatory fields will result in an error message.

#### 1.4.7 Editing Records

Before you can edit a record which already exists on the system, you must have sufficient permissions to do so. If you have the ability to edit the record you are currently viewing, there will be an "Edit" button on the toolbar, and an <a href="Edit">[Edit]</a> link in the frame of the record.

Editing a record has similar constraints as adding a new record, and you must save or discard your changes before you can proceed elsewhere.

## 1.4.8 Deleting Records

Before you can delete a record from the system, you must have sufficient permissions to do so. If you have the ability to delete a record from the result set you are currently viewing, there will be a "Delete" button on the toolbar.

Once a record has been deleted, it cannot be recovered through the application. If you believe you have deleted a record in error, please consult your Line Manager.

#### 1.4.9 Change Password

You can change your password at any time by clicking the <u>Change Password</u> link in the "My Account" task box on your homepage. After entering your old password, you are prompted to enter your new password choice twice. You can also choose to change your display name by changing the text in the "Display Name" field.

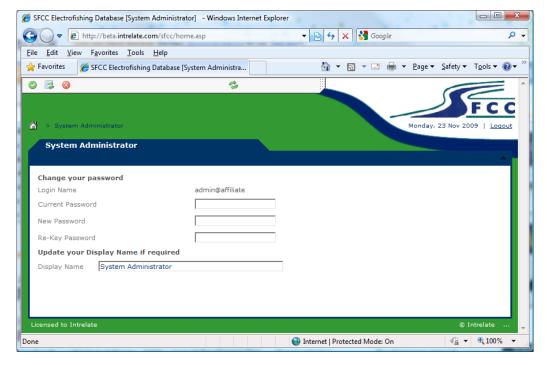


Figure 9 - Changing your password

When you are done, click the "Confirm" button on the toolbar to continue.

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# 2 Maintain Member Organisations

The system has the ability to view, and edit Member Organisations records which already exist in the application and add new ones if necessary. The system will have the following tasks available from the homepage:

- Member Organisations
- View My Organisation
- View Other Organisations

# 2.1 Member Organisations

The <u>Member Organisations</u> task will allow all the Member Organisations in the system to be viewed and modified and also add new Member Organisations if required. This task will only be available to SFCC Admin users. The content of a Member Organisation is discussed in section 2.4.

# 2.2 View My Member Organisation

The <u>View My Member Organisation</u> task will display the Organisation record of the user who is logged into the application. This Organisation is assigned to the user in <u>Maintain User Details</u> which is maintained by SFCC Admin. The content of a Member Organisation is discussed in section 2.4.

## 2.3 View Other Organisations

The <u>View Other Organisations</u> task will allow other Organisation's records to be viewed. A subset of other member organisations will be displayed. The content of a Member Organisation is discussed in section 2.4.

# 2.4 Member Organisation Record

If you want to add a new Member Organisations, and have permission to do so, first check that they are not already recorded in the system already to avoid duplication. If you are sure the Member Organisation is not in the system you can add a new Member Organisation record by clicking the <a href="#">|Add New|</a> link in the frame of the record of using the "Add" button on the toolbar. Editing a record is very similar to adding except that the <a href="#">|Edit|</a> link or "Edit" button is used.

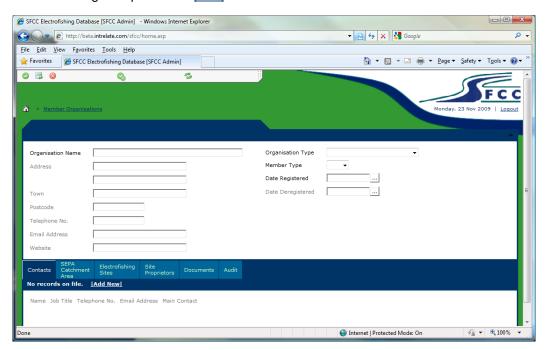


Figure 10 - Add new Member Organisation record

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Enter the relevant details on the screen then click on the "Confirm" button on the toolbar to save the new record. It should be noted that field labels which appear in bold mean that the field is mandatory and must be filled in before the record can be saved.

Below the main Member Organisation record are tabs that are used to log further information. The tabs displayed are as follows:

- Contacts this tab allows Contacts of the Organisation to be recorded and includes details such as their address and telephone numbers. If the 'Main Contact' checkbox is ticked, the Contact's name and contact details will be displayed in the header of the Member Organisation record.
- SEPA Catchment Areas this tab allows multiple SEPA Catchment Areas to be associated
  with an Organisation. It should be noted that a SEPA Catchment Area can be associated with
  a number of Organisations
- **Electrofishing Sites** this tab displays the Sites which are associated with the Organisation. The content of the tab is detailed in section 3.2.
- **Site Proprietors** this tab displays the Site Proprietors which are associated which are associated with the Organisation.
- **Documents** this tab allows documents relating to the Site to be uploaded. Details on how to upload documents are outlined in section 1.4.5.
- Audit this tab records the changes that have been made to the record. This records when
  the change took place, which user made the change and what the change was.

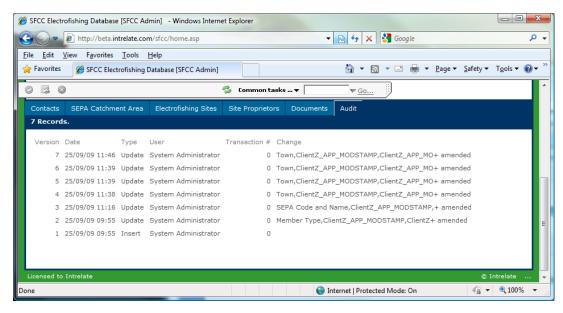


Figure 11 - Audit tab

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# 3 Maintain Sites

You can search, view and edit records for Companies which already exist in the application and also add new Companies if you have sufficient permission to do so.

#### 3.1 Search Sites

Clicking on the <u>Search Sites</u> link from the centre of the homepage will allow you to search for a Site using a number of different criteria. A search screen is distinguished from an input screen as "Search" is displayed in the border around the fields. As many fields as required can be filled in order to narrow down the result set. The Quick Search facility from the homepage can also be used to retrieve a Site record.

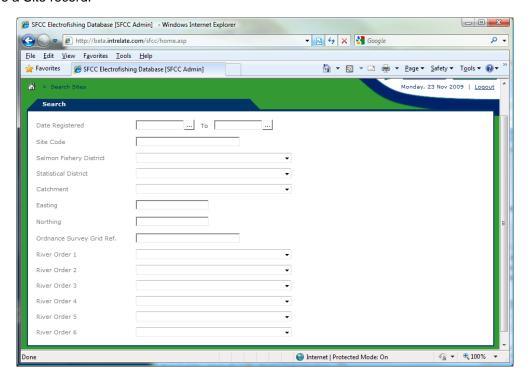


Figure 12 - Search Sites

#### 3.2 Add/Edit Sites

If you want to add a new Company, and have permission to do so, first search for them to ensure that they are not recorded in the system already to avoid duplication. If you are sure the Company is not in the system you can add a new Company record by clicking the <a href="#">|Add New|</a> link in the frame of the record of using the "Add" button on the toolbar. Editing a record is very similar to adding except that the <a href="#">|Edit|</a> link or "Edit" button is used.

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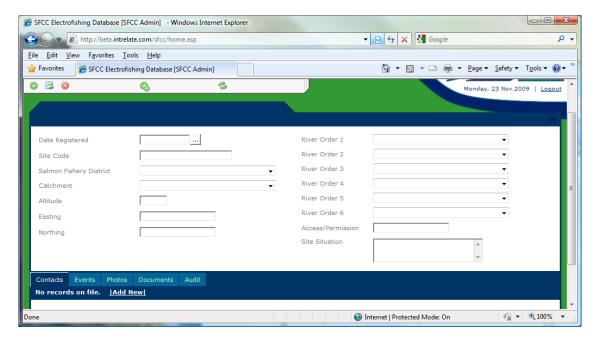


Figure 13 - Add new Site record

Enter the relevant details on the screen then click on the "Confirm" button on the toolbar to save the new record. It should be noted that field labels which appear in bold mean that the field is mandatory and must be filled in before the record can be saved.

The River Order dropdowns display the Rivers that are currently held in the system. Each River Order dropdown is linked to what was entered previously. For example, when a particular 'River Order 1' is selected, the options in the 'River Order 2' dropdown are the Rivers associated with the 'River Order 1'. If the required river is not displayed, there is the ability to add new ones and this is detailed in section 3.3.

Below the main Site record are tabs that are used to log further information associated with the site. The tabs displayed are as follows:

• Contacts – this tab allows the Site Proprietors of the Site to be recorded. To add a Contact to a Site, perform an Add in the usual manner and you will then be able to search for existing Site Proprietors by clicking on . If the Site Proprietor is not found by the search, there is the ability to add them using the standard method. This Site Proprietor can then be set as a left or right owner or another type of proprietor.

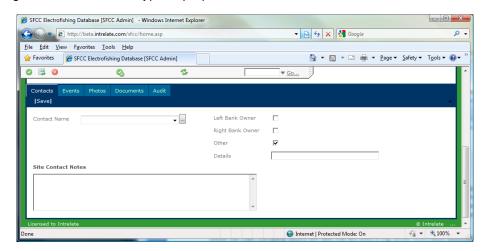


Figure 14 - Site Contacts

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- Events this tab will display the published events for this site. Events are added elsewhere
  in the system and are detailed in section 4.
- **Photos** this tab allows photos of the Site to be uploaded to the record. The Date Taken and Description can also be entered.
- **Documents** this tab allows documents relating to the Site to be uploaded. Details on how to upload documents are outlined in section 1.4.5.
- Audit this tab records the changes that have been made to the record. This records when
  the change took place, which user made the change and what the change was.

#### 3.3 Add New River

The River Order of a Site is added using the River Order fields. There may be instances when the required river is not present in the system. The river can be added in the following way:

- Add a new Site and set the River Order fields as far as possible. For example, if the Site has a River Order 6 which is not present in the system, set River Orders 1-5. Save the Site record.
- 2. Click on the Add New River task in the header of the Site record.

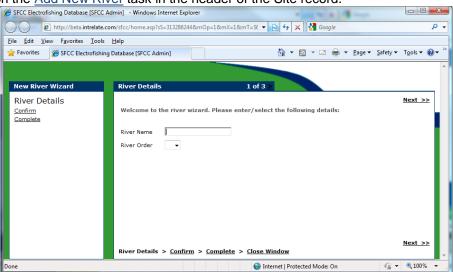


Figure 15 - Add new River Order

- 3. Enter a 'River Name' and a 'River Order'. This 'River Order' should be the next in sequence to the River Orders entered in Step 1. Now click on the Confirm or Next >> link.
- 4. The next page will ask for confirmation that what has been entered is correct and if so click on the Complete or Next >> link.
- 5. The River has now been created and click on the <u>Close Window</u> to complete the process.
- 6. This River will now be displayed in the Site record as the River Order which was set.

## 3.4 View Site on Streetmap

There is a task in the header of the Site record called <u>View Site on Streetmap</u> which will allow the site to be viewed on Multimap. When an Easting and Northing is entered in the Site record, an Ordnance Survey Grid Reference is automatically generated. This grid reference will then determine the location of the Site on Streetmap.

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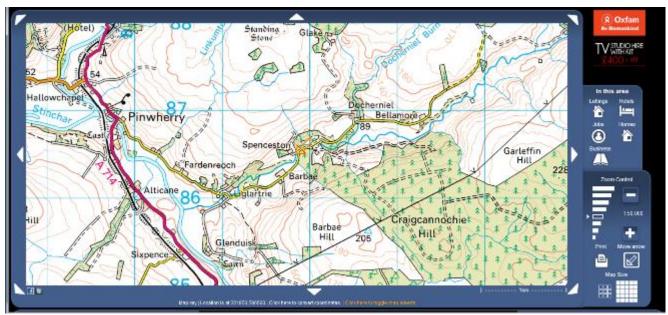


Figure 16 - Site displayed on Streetmap

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## 4 Maintain Events

You can search and maintain Event records which already exist in the application and also add new Events if you have permission to do so.

#### 4.1 Search Events

There is the ability to search for Events using a variety of search criteria from the <u>Search Events</u> task on the homepage. A list of events will be displayed where a specific Event can be selected by clicking on the 'Ref No'. Trust users have tasks to <u>View Incomplete Events</u> or <u>View Published Events</u> from the homepage and new events can be added from the <u>View Incomplete Events</u> screen.

#### 4.2 Add/Edit Events

If you want to add a new Event, and have permission to do so, first search from them to ensure that they are not already recorded in the system to avoid duplication. If you are sure the Event is not in the system, you can add a new Event by clicking the <a href="#">|Add New|</a> link in the frame of the record of using the "Add" button on the toolbar. Editing a record is very similar to adding except that the <a href="#">|Edit|</a> link or "Edit" button is used.

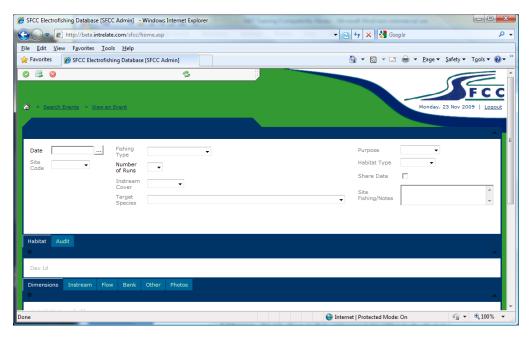


Figure 17 - Add new Event

## 4.3 Fish Entry Wizard

The <u>Fish Entry Wizard</u> task will be available from the header of the Event record. This task will be displayed depending on the 'Fishing Type' entered which are as follows:

- Quantitative (1mm)
- Quantitative (5mm)
- Timed

When the <u>Fish Entry Wizard</u> task is clicked, a new window will be opened with a menu of tasks which are to be performed. A species must be selected before a task can be selected. This means that each stage will need to be completed for each species.

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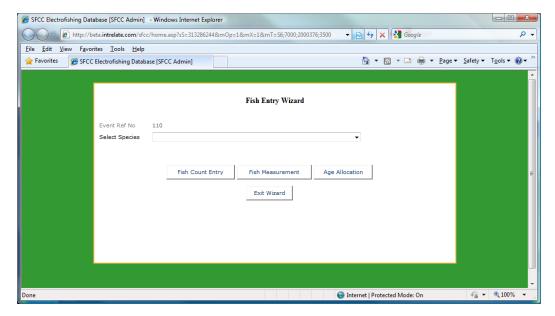


Figure 18 - Fish Entry Wizard menu

A log of the species and the tasks completed can be found in the 'Audit' tab in the Event record. The three steps to the Fish Entry Wizard are as follows:

- Fish Count Entry
- Fish Measurement
- Age Allocation

Each stage should be completed for each species and each of the stages are discussed in turn.

#### 4.3.1 Fish Count Entry

The 'Fish Count Entry' button allows the number of fish electrofished to be recorded. When a 'Species' is selected and the 'Fish Count Entry' button clicked, a link to view the <u>Electrofishing</u> Recording Sheet is displayed. Clicking this will open a window with a similar look and feel to the paper recording sheets currently in place by SFCC.

The Recording Sheet will appear slightly differently in the following circumstances:

- The fields for lengths will differ depending on Fishing Type:
  - o If 'Fishing Type' is 'Quantitative (1mm)' or 'Timed' they will be in 1mm increments
  - If 'Fishing Type' is 'Quantitative (5mm)' they will be in 5mm increments
- The number of recording sheets created will be dependent on the 'Number of Runs' entered when creating the event. For example, is there are 3 runs, the Recording Sheets will be repeated 3 times.

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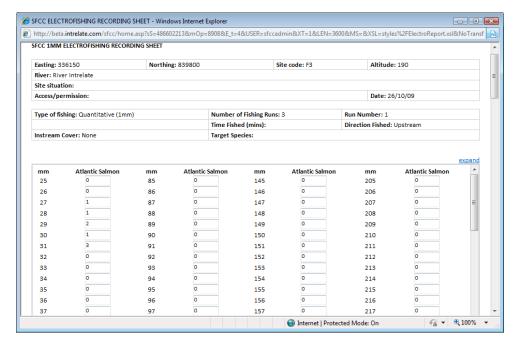


Figure 19 - Quantitative (1mm) Recording Sheet

The top of the Recording Sheet displays a summary of the Event which is entered to the Event main record. Below are fields to enter a count for each of the lengths. When a count is entered into a field, the background colour is red until the cursor is moved away, which may be using the 'tab' key or clicking elsewhere on the screen. When the cursor is moved away, the background colour will change to white indicating that the value has been saved. The fields will also reject non-numerical characters. 1

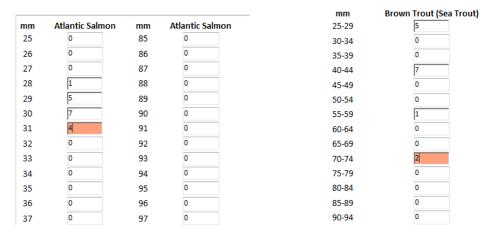


Figure 20 - Length counts for 1mm and 5mm

Below the fish entry boxes for each run, is a histogram of the displaying the lengths along the bottom against the counts for each length. There is a 'Reload Graph' button which when clicked will update the graph to illustrate the current counts entered. This refresh can be done at any time and is useful to view the graph at a glance to see if any errors have been made from data input. If the 'Fishing Type' is 'Quantitative (5mm)' the graph axis will be in 5mm increments.

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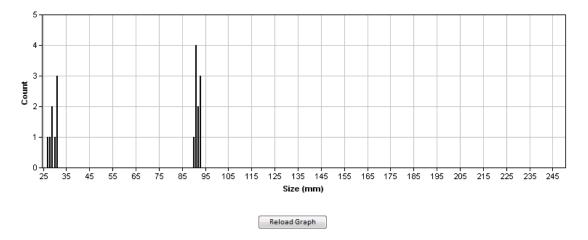


Figure 21 - Length Histogram

When this has been completed, close the window and click on the 'Return to Menu' button. This will return to the Fish Entry Wizard menu with the previously selected Species displayed to continue the next steps of the Fish Entry Wizard using the same species. The Fish Count Entry for other species can be completed if desired. If the Electrofishing Recording Sheet is closed down and returned to at a later date for the same species, the values entered will still be retained.

#### 4.3.2 Fish Measurement

The 'Fish Measurement' button allows individual fish details to be entered. The 'Fish Count Entry' screen should be completed before this stage. When the 'Fish Count Entry' option is clicked, the <a href="Individual Fish Measurement">Individual Fish Measurement</a> task should be clicked to open a new window. This screen is a standard view with a tab where individual fish details are added in the usual manner using the |Add New| link.

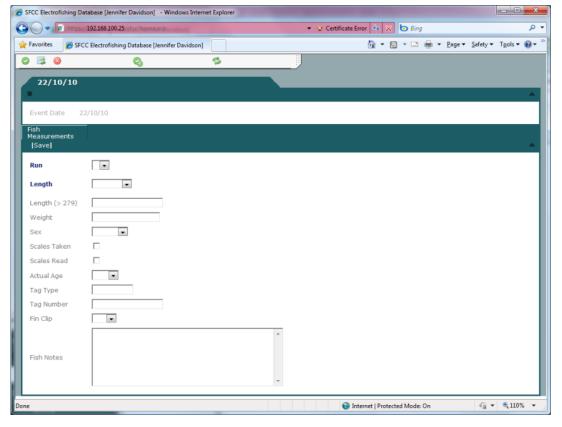


Figure 22 - Individual Fish Measurement

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The 'Run' and 'Size' fields are mandatory and the 'Run' dropdown only allows you to select a run number according to the number of runs set when the Event was created. Other information, such as the weight and actual age, can be added if this information was obtained. It should be noted that the

'Save and Add' button sis useful to use here so that multiple records can be added quickly and efficiently by saving the current entries and opening a new blank record.

When the records have been added, close the window to complete this process and click on the 'Return to Menu' button on the Fish Entry Wizard screen.

# 4.3.3 Age Allocation

The next stage of the Fish Entry Wizard is to set the age allocation of the Event. Clicking on this will display an 'Age Allocation Class' field with the options of 'Fine' and 'Course'. Selecting the 'Fine' option will allow the fish to be aged from 0 to 4++ and selecting the 'Course' option will allow the fish to be aged as 0 or 1++. When an age class has been selected, click on the 'Continue' button and then the <u>Age Allocation Report</u> task on the next screen. This will open a new window which will allow the breakpoints to be entered.

The page displays the following aspects:

- Fields to enter the breakpoints for the Age Classes specified (Fine or Course)
- A histogram displaying the counts for the lengths across all runs. The specific run the fish was counted in is displayed in the graph as different colours.
- A graph displaying the individual fish which have been added with an age entered. Each fish is identified with a cross. Strain The run is identified by the same colour as the histogram above.

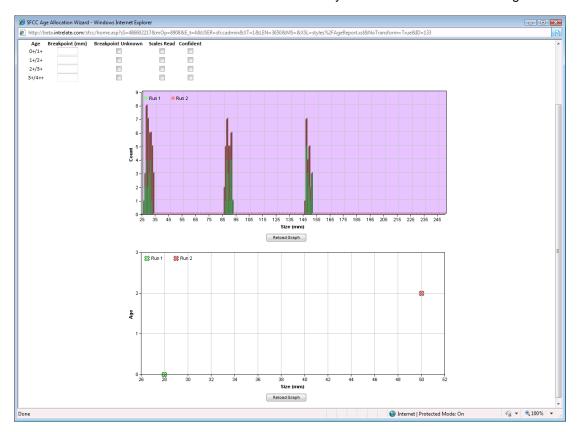


Figure 23 - Age Allocation Report

The breakpoint fields operate in the same way as the Electrofishing Recording Sheet where the background colour of the fields modify according to its status of saved or not saved. There is validation on the fields to ensure that either a breakpoint is added or the 'Breakpoint Unknown' box is ticked. Additionally, the breakpoint entered must be greater than the earlier age class.

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Age	Breakpoint (mm)	Breakpoint Unknown	Scales Read	Confident
0+/1+	35			
1+/2+	10			<min< p=""></min<>
2+/3+				
3+/4++				

Figure 24 - 1+/2+ Breakpoint cannot be less than 0+/1+

When the breakpoints are entered, the graphs can be refreshed for the graphs to visually illustrate where the breakpoints lie. When the 'Reload Graph' button is clicked the background colour of the graph will be modified to illustrate the age class.



Figure 25 - Breakpoints and Overall Length Histogram

The individual fish graph can also be refreshed to illustrate where the breakpoints lie. The same colours as the length histogram will be used.

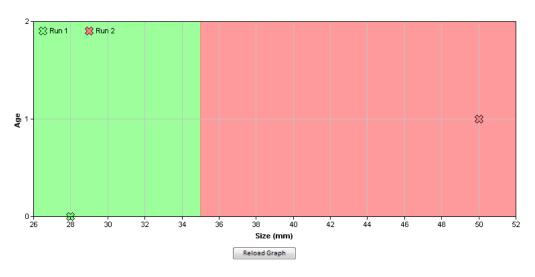


Figure 26 Individual fish graph

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Close the window to complete the age allocation aspect of the Fish Entry Wizard and therefore the fish entry process for the species selected. This should be repeated for each species sampled. If the Age Allocation Report is closed down and returned to at a later date for the same species, the values entered will still be retained.

#### 4.4 Presence / Absence

If the 'Fishing Type' of the Event is 'Presence/Absence' then the <u>Fish Entry Wizard</u> task will not be available. Instead, a 'Present Species' tab will be displayed below the main Event record.

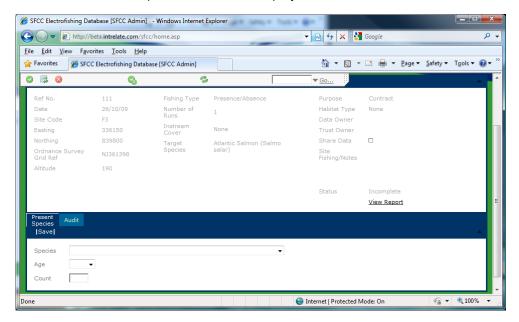


Figure 27 - Present Species tab

The 'Present Species' tab allows the species to be recorded along with an 'Age' and a 'Count'. The 'Save and Add' button is useful here to speed up the process of adding a large number of records.

# 4.5 Other Fish Species Count

For all Fishing Types there is a tab to allow data capture of other fish species recording during the event, that do not require the full details to be entered into the Fish Entry Wizard.

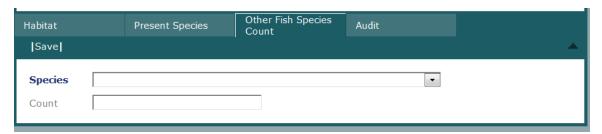


Figure 28B - Other Fish Species Count tab

The 'Other Fish Species Count' tab allows the species to be recorded along with a 'Count'. The Count may be in text format or a number, e.g. 15 to 20. The Count field is also non-mandatory in the event that you simply want to record that a species was present.

#### 4.6 Habitat

The Habitat tab is displayed when the following 'Habitat Types' are selected:

General

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- Transect
- Timed

The 'Habitat' tab allows information related to the habitat of the site to be entered into the system. The content of the tab is dependent on the 'Habitat Type selected when an Event is created. If a 'Habitat Type' of 'None' is selected, the 'Habitat' tab will not be displayed. It should be noted that the 'Habitat Type' options which can be selected are dependent on the 'Fishing Type' selected.

A series of child tabs are displayed below the 'Habitat' tab. These tabs are displayed regardless of which 'Habitat Type' is selected although the content within each may be slightly different. The content of the tabs mirror the Habitat recording sheets currently used by SFCC.

- Dimensions this tab records the measurements of the habitat of the site including lengths, widths and depths. This tab displays a number of fields, including 'Site Length' which is required for density calculations, and then a series of child tabs below. Clicking on the Edit link will allow all the fields to be modified at the same time.
  - Measurements this tab will not be displayed for Events with a 'Habitat Type' of 'Timed'. The content will differ slightly for 'General' and 'Transect' types where 'Transect' will have additional fields. The number of points (number of rows) displayed in the tab is determined by the number entered in the 'No. of Points Used' field in the main Event record. In the examples below, you will see that the General tab has 3 points used and the Transect tab has 4 points used.

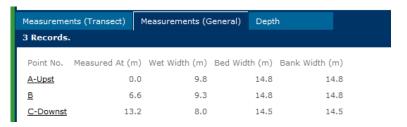


Figure 29 - Measurements tab for General

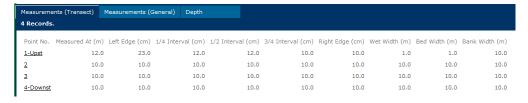


Figure 30 - Measurements tab for Transect

Depth – this tab will not be displayed for Events with a 'Habitat Type' of 'Transect'.
 There is validation to ensure that the total of each of the depths total 100%.

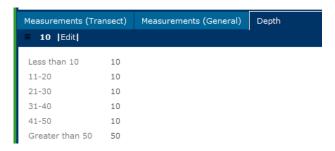


Figure 31 - Depth tab for General and Timed

Instream – this tab allows the instream details to be entered. There are a number of fields
within it and there is also a child tab below called 'Substrate'. The 'Substrate' tab differs for
habitat types of General or Timed and Transect. The tabs are largely the same except that

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for 'General' or 'Timed', there is only one set of values to be entered and for 'Transect' the number of rows depends on the 'No. of Points Used'. There is validation in place to ensure that the values entered for each Substrate type totals 100.

- **Flow** this tab allows the flow details to be entered. The same rules as the Instream tab are applied except that the fields are relevant to Flow.
- **Bank** this tab allows bank details to be entered in the system. There is a Bankside Cover tab below which the same for all Habitat Types.
- Other this tab has a series of fields for additional information for the habitat to be entered such as the equipment used and general surroundings.
- Photos this tab allows photos from the event to be added to the Event record.

#### 4.7 Audit

There is an 'Audit' tab displayed at all times regardless of the 'Fishing Type' or 'Habitat Type' selected. This records the when and who carried out particular activities within the Event. In the case of entering Fish Counts and Age Allocation, the species is also recorded to remind the user what has been completed if they have had a break of entering data. This also records who published and unpublished events and when this was.

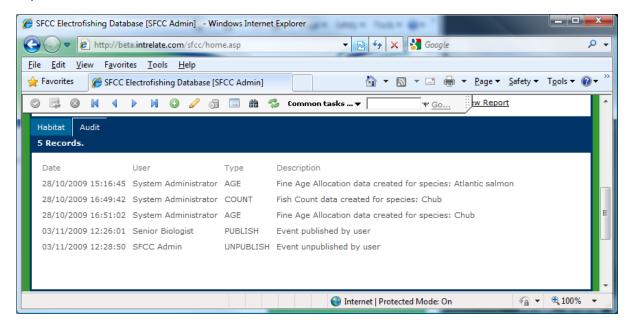


Figure 32 - Audit tab

#### 4.8 Publish Events

When Events are created, they are given a default status of 'Incomplete'. When all the information relating to that Event has been entered into the system, the Event needs to be published in order for the data to be approved and be available for reporting in the profilers as well as the density calculations to be carried out.

The incomplete events can be accessed by clicking on the <u>View Incomplete Events</u> task on the homepage. An event can be published by clicking on the box on the left hand side of the record and then clicking on the <u>Publish Event</u> task at the bottom of the screen. Multiple Events can be published at the same time although this may take more time to process. The publishing of events will be recorded in the Event Audit.

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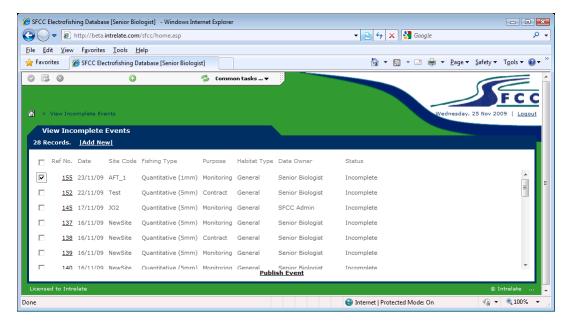


Figure 33 - Publish Events

A published event can then be accessed through the View Published Events screen.

The SFCC Admin role will have access to a <u>Search Events</u> screen where particular events can be retrieved and have the ability to publish and unpublish the events and view the report. When an Event is published, the data entered will become 'locked' and therefore cannot be modified. The event record cannot be accessed but the report will be available to view the information as well as the data being available by using the profilers.

# 4.9 Event Report

There is a task called <u>View Report</u> in the main Event record which creates a report with a summary of the information entered for the event. This can be accessed from the main Event record when the Event is unpublished and also from the list view from the <u>Search Events</u>, or <u>View Published Events</u> screen.

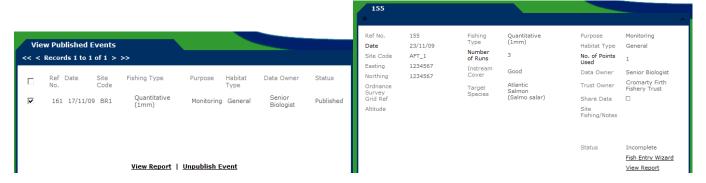


Figure 34 - View Report tasks

The report provides a summary of the information entered in terms of event details, counts, habitat information and also fish densities if the Event has been published. Please note that density calculations only occur when events are published therefore if you view the report for an unpublished event, the density tables will not be populated. There will be a separate density report for each species recorded.

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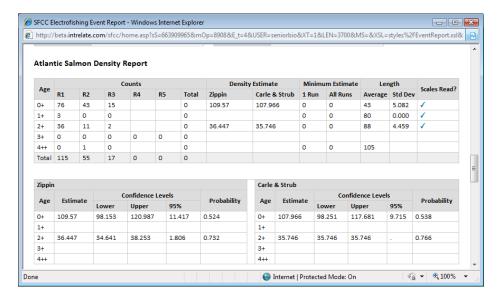


Figure 35 - Density section of Event Report

The SFCC gratefully acknowledge the use of REMOVE software and its associated code, written by Professor Ralph Clarke, Centre for Conservation Ecology and Environmental Change, Bournemouth University, for the calculation of Zippin and Carle & Strub density estimates

In the case of Presence/Absence events, the Density section of the report will not be displayed and specific Presence/Absence information will be displayed.

## 4.10 Unpublish Events

If an error is found in a published event, there is the ability to unpublish an event. When an event is unpublished, the data will be reverted back to its original state and can be modified. The unpublishing of events will be recorded in the Event Audit.

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# 5 Other Functionality

# 5.1 Document Library

There is a task box on the homepage called "Document Library" which allows documents such as Microsoft Word and PDF documents to be uploaded and accessed from the application in a central store.

#### 5.1.1 Maintain Document Library

The <u>Maintain Document Library</u> link may not be available to all users of the system and allows documents to be uploaded so that they are available to other users. Documents are added in the same way as the "Documents" tabs.

## 5.1.2 View Document Library

The <u>View Document Library</u> link allows you to see the documents uploaded in the system and allows you to download them for further use.

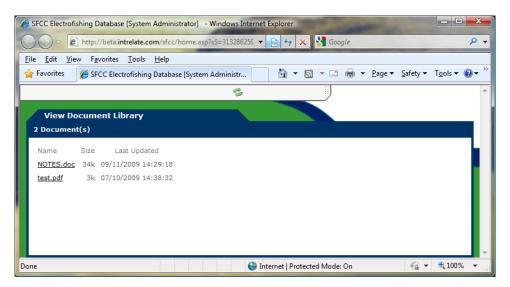


Figure 36 - Document Library

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# 6 Reporting

The user can perform reporting tasks directly from the homepage via the "Reporting" task box.

#### 6.1 Profilers

A Profiler is a facility in the system which can be used for reporting purposes. A Profiler allows you to build up a result set of records that can be exported into a CSV file for further analysis. The following profilers are available from the "Reporting" task box from the homepage.

- **Site Profiler** returns a result set of Site information using Site, Event and Fish criteria which can be exported to CSV containing Site information or as a GIS Export.
- Event Profiler returns a result set of Event information using Event, Site and Fish criteria which can be exported to CSV containing Event information, as a Fish Density Export or as a GIS Export.
- **Fish Profiler** returns a result set of Fish information using Fish, Event and Site criteria which can be exported to CSV containing fish, event and site information.

#### 6.1.1 Site Profiler

The Site Profiler will be used as an example to demonstrate the functionality of a Profiler. When the <u>Site Profiler</u> task is selected from the right hand side of the homepage; the Profiler is displayed. The total number of records in the result set before any criterion has been selected is shown on the left hand side of the screen.

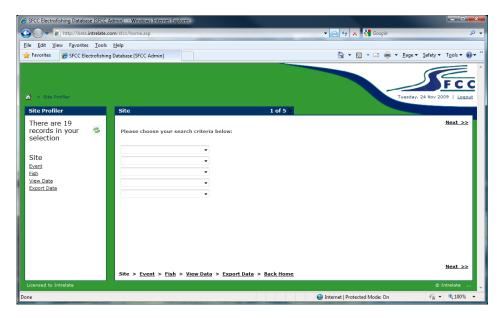


Figure 37 - A typical data profiler

You can then filter the data using the groupings shown on the left hand side of the screen, below the number of the records in the selection. For example, if you wanted to filter based on information on the related Events then you would click on the <a href="Event">Event</a> hyperlink on the left of the screen. The "Event" page would then be displayed in the larger section of the screen where you would then enter the relevant criteria.

As much or as little criteria can be set as required. If multiple fields are set, the system, will perform an OR comparison. E.g. if you selected a Catchment of 'Spey' and a Catchment of 'Conon', the sites with either 'Spey' or 'Conon' would be returned in the result set.

The number of records in the result set can be checked if you click on the refresh button and the number of records displayed on the left hand side is updated according to the criteria that have been set. When you are happy with the criteria set, click the View Data hyperlink. This will take you to a screen where the resulting list of records is displayed.

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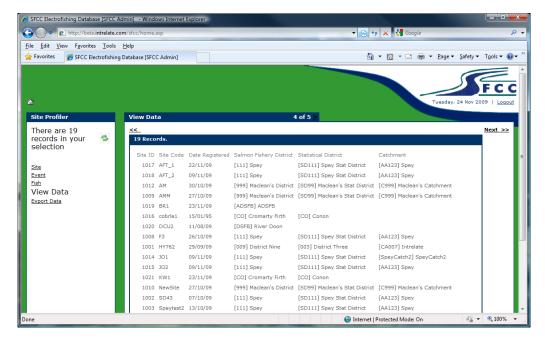


Figure 38 – A typical View Data screen

The Export Data link will display a list of tasks which will allow the data to be exported.

#### **6.1.1.1 Export to CSV**

When you have specified your search and clicked on the <u>Export Data</u> link there is an <u>Export to CSV</u> task displayed.

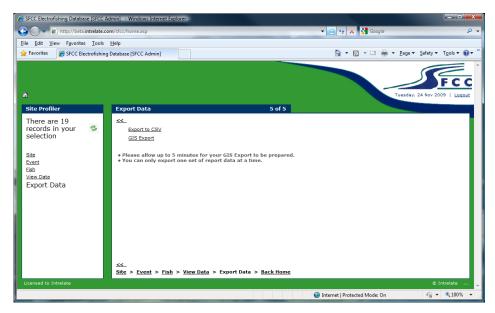


Figure 39 - A typical Export Data screen

When the <u>Export to CSV</u> task is clicked, there will be the option to open or save the file. If you have Excel installed, the data can be viewed in Excel.

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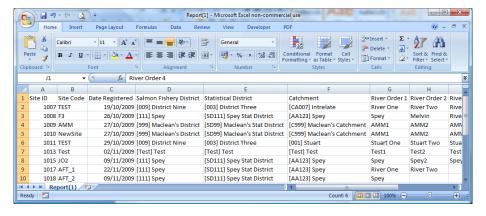


Figure 40 - A CSV file open in Excel

#### 6.1.1.2 Large Exports

As well as having the ability to export the data as a CSV which can be opened in Excel in the Export Data screen, there are two other types of reports which can be created which are:

- GIS Export
- Fish Density Export

When these tasks are invoked, the reports will be created in the background and available after a short period of time. You may continue to use the application whilst this process is taking place although it should be noted that only one large export can take place at the one time.

When the <u>GIS Export</u> of the <u>Fish Density Export</u> task is clicked, a pop-up box is displayed to confirm that you want to create the file. Clicking 'OK' will continue the process and the report will be created.

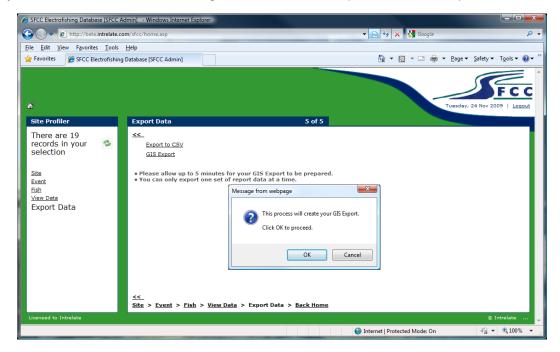


Figure 41 - Report creation confirmation

The created report can be accessed from the 'My Reports' task box on the homepage. There are <u>GIS</u> Exports and Fish Density Exports tasks for the relevant reports

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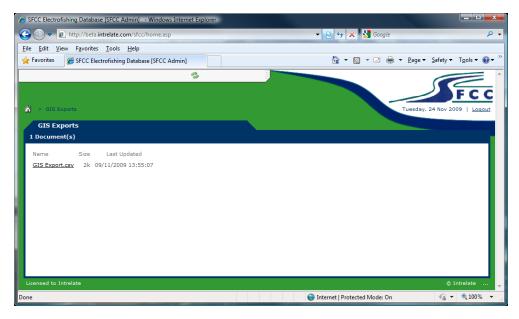


Figure 42 - My Reports - GIS Exports

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# 7 System Administrator

If you have System Administrator privileges, there are a number of additional features of the application which can be carried out.

#### 7.1 Maintain Users

The list of users can be viewed and maintained by clicking the <u>Maintain User Details</u> task in the "System Administration" task box. This displays the list of all the users currently registered in the application, as well as the role group they belong to. From here, accounts can also be added and disabled.

## 7.1.1 Adding a New User

Once the user list is displayed and it is checked that the user to be added does not already have access to the system, click the |Add New| link or the "Add" button on the toolbar.

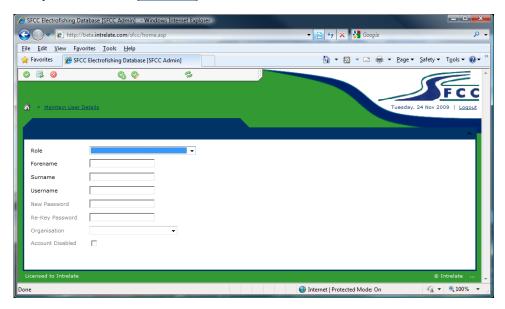


Figure 43 - Add a new user

The following list provides a description of each of the fields:

- Role this determines the access rights a user has in the system
- **Forename** and **Surname** the user's forename and surname should be entered here and a concatenation of both will be the user's display name which will appear on every screen when they are logged in.
- **Username** this, alongside a password, is what the user must enter to gain access to the system.
- **New Password** this is the user's password. The user will have the ability to change their password at any time.
- **Re-Key Password** the password needs to be re-keyed to confirm that the correct password has been given. An error will occur if the two fields do not match.
- **Organisation** this field allows a user to be associated with a Trust or DSFB so that they can only view information related to their organisation.
- Account Disabled if this is ticked, the user will not be able to log into the system

#### 7.2 Maintain Lookups

A "drop-down" is a choice box which is available on some views to constrain users to select a particular value or series of values. These options can be changed by an Administrator by carrying out Lookup Maintenance.

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## 7.2.1 Lookup Types

Before a new lookup value can be created the lookup type it is associated with must be present in the application. From the homepage, select the <u>Maintain Lookup Values</u> task. A list of all the lookup types, in other words each of the dropdowns where the options can be maintained, that already exist in the system will be displayed.

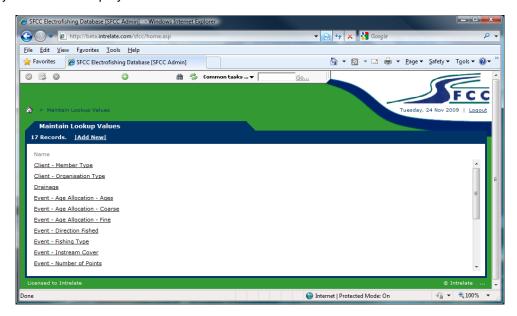


Figure 44 – A list of lookup types

#### 7.2.2 Lookup Values

The actual values which appear in the majority of the dropdown boxes, or Lookup Values, are also maintained via the <u>Maintain Lookups Values</u>. To view the lookup values, select the Lookup Type that you want to add a new value to. A list of the current lookups will be displayed.

To add a new lookup value, click | Add New|, or select the "Add" button on the toolbar

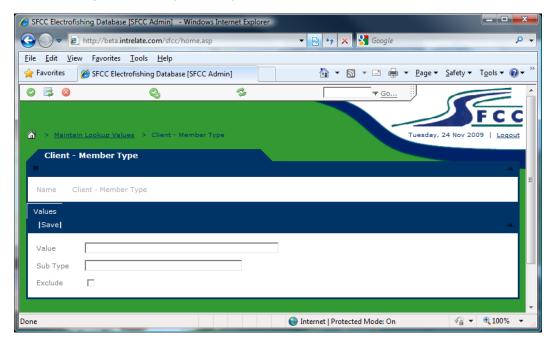


Figure 45 - Adding a new lookup value

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You can then enter the Value into the appropriate field. The 'Sub Type' field will generally be left blank. To exclude a lookup value from a list, tick the "Exclude" checkbox. When you are finished, click the "Confirm" button on the toolbar to save the new record.

#### 7.3 Maintain Districts

The <u>Maintain Districts</u> task on the homepage allows the Salmon Fishery Districts to be added to the system and their details maintained.

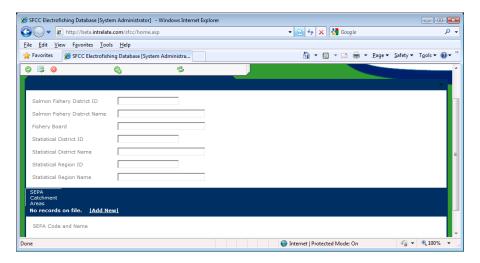


Figure 46 - Add new District

When a new district is added, this can be associated with many catchment areas in the 'SEPA Catchment Areas' tab. The Catchment Areas must be added via the Maintain Catchment Areas task (see section 7.4) before it can be associated with a District.

#### 7.4 Maintain Catchment Areas

The <u>Maintain Catchment Areas</u> task on the homepage allows the SEPA Catchment Areas to be added to the system and their details maintained.

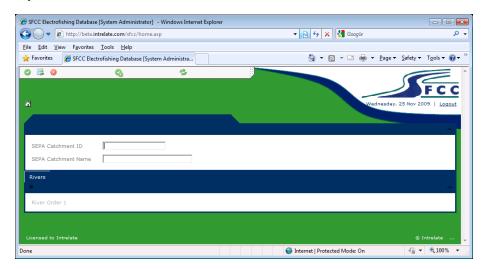


Figure 47 - Add new Catchment Area

When a Catchment Area is added, Rivers can be associated with it by adding a River Order 1. Catchment Areas can also be associated with an Organisation through the 'SEPA Catchment Areas' tab in the Organisation record.

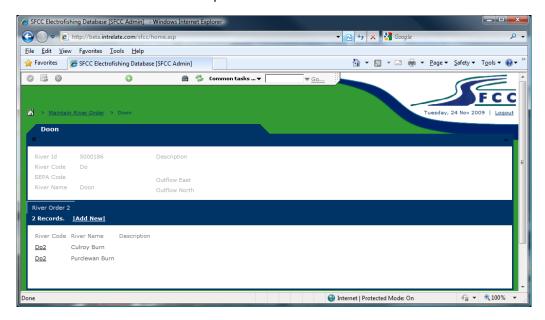
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#### 7.5 Maintain Rivers

#### 7.5.1 Maintain River Order

The <u>Maintain River Order</u> task allows Rivers and their tributaries to be entered in the system and will be displayed in the relevant River Order dropdowns throughout the application. Each River Order 1 has a record and its tributaries are recorded in tabs below with River Order 2 next and River Order 3 below that etc. Each level can have multiple rivers associated with it.



**Figure 48 - Maintain River Orders** 

In the example above, there are 2 River Order 2's associated with the River Order 1 of Doon. A River Order 2 river will have multiple tributaries associated with it and so on down to River Order 6. Rivers can also be added into the system when a new Site is created and this is detailed in section 3.3.

# 7.5.2 Search River Order

There is a task on the homepage called <u>Search River Order</u> which will allow the Rivers to be searched for and displays the results in the one screen without the need to drill down a number of tabs as demonstrated above. Searching for a particular River Order returns all the rivers which are associated to it.



Figure 49 - Search and Search Results

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#### 7.5.3 Maintain River Codes

Adding rivers from a site record is a quick and easy method to add rivers which are unknown to the system. Therefore, only a limited set of information is obtained which are the Name and the River Order for each river. The <u>Maintain River Codes</u> task on the homepage displays a list of Rivers which have been added via a site that do not have River Codes. The Codes can be added by clicking the <u>Edit Codes</u> task. When the relevant codes have been entered, click on the <u>Done</u> task. Any Rivers with River Codes entered will now not be available from the <u>Maintain River Codes</u> task.

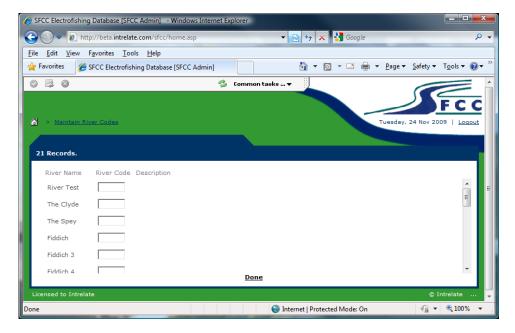


Figure 50 - Maintain River Codes

## 7.6 Maintain Species

The <u>Maintain Species</u> task allows the species which appear in the dropdown boxes throughout the application to be maintained.

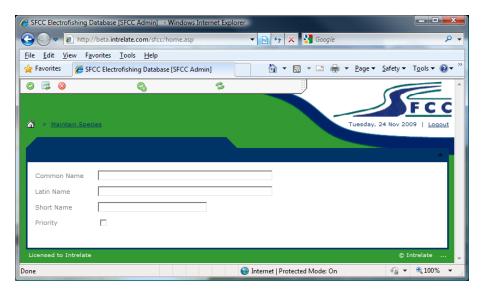


Figure 51 - Add new Species

The 'Short Name' is the name which appears in reports and the 'Priority' checkbox means that the Species will be displayed at the top of the list in the dropdown. Species which do not have the 'Priority' checkbox ticked will be displayed alphabetically.

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## 7.7 Maintain Grid References

The <u>Maintain Grid References</u> task allows the Ordnance Survey Grid Reference prefix to be associated with the first digits of the Eastings and Northings. This assists the conversion of Easting and Northing to the Ordnance Survey Grid Reference which is used to view the location of a site on Multimap (see section 3.4). This information is not likely to change and is provided for reference.

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