# **SWIMS Help Guide: Documents**

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## Common SWIMS symbols and their use

Symbol	Name in this guide	Use
٥	Magnifying glass	Clicking on this will let you view details.
Ø.	Pencil	This lets you edit.
<u>)D(</u>	White piece of paper	This lets you add a new entry.
<b>=</b>	Trash bin	This lets you delete an entry (use sparingly).
<b>*</b>	Wizard	This brings you to the wizard view, an alternate way to edit.
**	Fisheries Database link	Clicking on this symbol will take you to the Fisheries Database.
0	Backfill Arrow	This lets you add searched information to a project or a search.

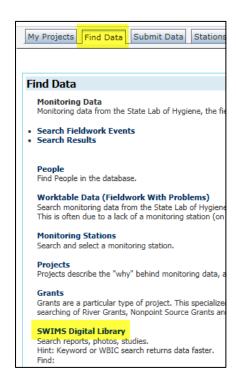
#### **Search for a Document**

On the Find Data tab click on 'SWIMS Digital Library' to get to the search page.

Use known information to find the documents you're looking for

The search page allows you to search by:

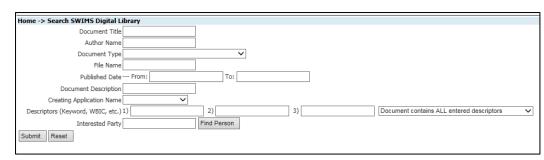
- Title\*
- Author ('Author Name' and 'Interested Party')
- **Document type** <u>list here</u>.
- **File Name** useful if you know the name of the file uploaded.
- **Published Date** currently needs to be a full date (MM/DD/YYYY).
- Descriptors The 'Document Descriptor' blank allows you to search by any word or words in a document description, which is written by the person uploading the file. The 'Descriptors' blanks are for any associated keywords, WBICs, publication number, or other document descriptors.



- Creating Application Name documents in SWIMS can be uploaded from other databases that are linked. The options here are:
  - o EGAD Electronic Guidance and Documents; all digitized guidance documents would come up with this selected.
  - o FMDB Fisheries Management Database; documents related to the fish database.
  - o OTHER
  - Online Documents
  - o ROW Register of Waterbodies.
  - SWIMS Most documents will be created in SWIMS. Using this search tool would be most beneficial if you're specifically trying to filter out documents from the other applications.
  - o WATERS Water Assessment, Tracking, and Electronic Reporting System; documents related to water quality assessments.

#### \*Tip:

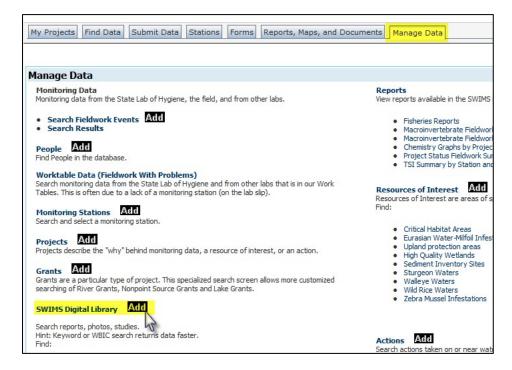
You can use the symbol % between words if you're unsure of an exact title. For example "Citizen %Oak" brings up these two documents:

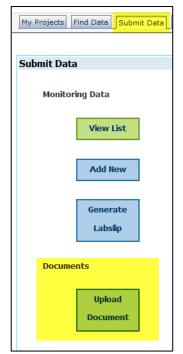


- "Wisconsin Citizen Lake Monitoring Network Secchi [Jim Dehn; Oak lake; 73139; datasheet 2014]"
- Wisconsin Citizen Lake Monitoring Network -- Secchi [Oak 073139 Data Sheet from 2015]

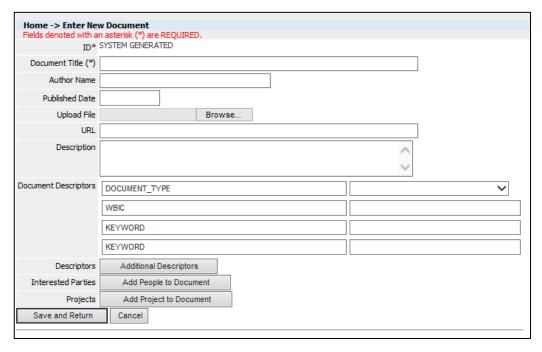
#### **Upload a New Document**

There are two ways to get to the document upload screen: The "Manage Data" tab and the "Submit Data" tab. A document upload "widget" is also available in the Documents tab of the Project Wizard.





**Fill in as much information as possible**. The more information available for a document the more likely it is that people searching for it will find it. Keywords, for example, will help anyone searching by descriptors.



**Document title**. Be exact when typing in the title of the document and if you need to ad-lib use brackets. This helps find the document more easily and know if a document has already been uploaded.

**Author Name**. Determine who is most likely to be the author. This could be a person, city, town, lake group, or a consultant.

**Published Date**. Determine if there is an actual date associated with the document. Reports, ordinances, and publications usually have dates of when they were finalized. Field sheets usually won't have a date and in their case the current date can be used.

Upload File. Find the correct file on your computer.

**Description**. General description of the document; it should be short and have pertinent information (what is contained in this document? Is it a report, a map, have water quality data?).

**Document descriptors**. These label a document in a way that informs a person who is going to download it and makes the document more easily found in a search. To see more options click "Additional Descriptors."

- **i. Document type**. This is a dropdown option with many choices. Pick all that apply to your document—these will be added one by one. You will likely only work with a few of these. In following instructions for specific document types the needed descriptors are listed.
- Agreement
- Aquatic Plant Distribution Map
- Aquatic Plant Management Plan
- Aquatic Plant Sampling Text File
- Aquatic Plant Survey Written Report
- Assessment Documentation
- Bathymetry Map
- Boating Ordinance
- Boating Ordinance Historical
- Brochure
- Budget
- Contract
- Correspondence
- County Surface Water Inventory
- DNR Public Notice and Press Release
- Data or Dataset
- Draft Report
- Email Correspondence
- FERC Report
- Factsheet
- Field Methods, Procedures
- Final TMDL

- Fish Survey Written Report
- Fisheries Assemblage Report
- Fisheries Survey
- Guidance
- Impaired Water Documentation
- Issue Brief
- Lake Management Plan
- Live SWIMS Report
- Map
- Media Coverage
- Monitoring Proposal
- Monitoring Report
- Newsletter
- Nine Key Element Plan
- ORW ERW Documentation
- Outreach Materials
- Paper field form (blank)
- Photo
- Plan Amendment
- Planning Report
- Plant Sampling Map
- Policy Documentation

- Presentation
- Press Release
- Procedural Instructions
- Progress Report
- Project Application
- Project Details
- Quality Assurance Project Plan (QAPP)
- Quarterly Report
- Scanned, filled out forms or field notes
- Special Study
- TMDL Implementation
- Taxonomy Documentation
- Technical Report
- Training Manual
- Trout Class Documentation
- USEPA Approval Letter
- USEPA Final Decision Document
- Use Designation Report
- Video
- Web Link

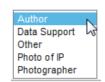
- **ii. WBIC**. If a document is associated with a particular waterbody then the WBIC (Waterbody Identification Code) should be entered.
- **iii. Keywords**. These are text labels that can be used in a search. It usually helps if these are simple.
- **iv. Titled Correctly.** If you were exact in the title type YES in the text box.
- v. PDF Quality. Options to type in are Poor, Fair, Good, Excellent. Poor quality means that the file is grainy, hard to read, and difficult to use. Excellent means that it is easily read and that the text is accessible (you can highlight and copy it). Use your judgment.
- vi. PDF Accessible. If you can highlight/select text in the document then it is accessible and you would type

YES. If you click on the page and it all turns blue (highlights) then type NO.

Audience Author Boat Ordinance ID Category County Date Mapped Display Online (Yes/No) Display on Lake Pages (General Lake Photo) Document Type EGAD Number FERC ID Field Collection Procedures File Format / Software Version Flickr Photo URI Guidance Type Keyword Manual Codes Other PDF Accessible? PDF Quality Publication Number Resource of Interest Code Status Titled Correctly (Exact Title, if necessary follow with descriptive title in square brackets []) WATERS ID WBIC Waterbody Text Waters Event Number Waters Group Number Watershed Code

Administrative Rules

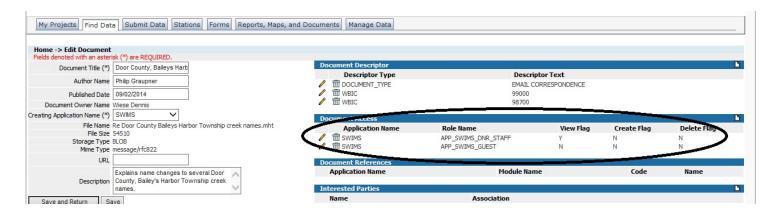
**People.** Add people associated with the document if their name is in SWIMS. You can add an Author, Data Support, Photo of IP (means that it's a photo of this person), Photographer, or Other (if nothing else fits).



**Projects**. Use the "Add Project to Document" button to search for the correct project for this document if there is one.

**Privacy**. Make sure that documents don't have personal information. If the type of form you are uploading does have personal information (e.g. Release of Claims forms) then the document needs to be made private.

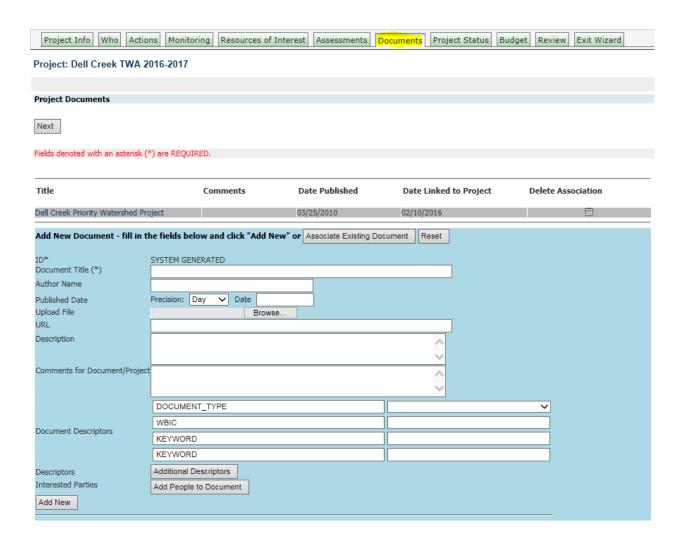
- **i.** Find the document and Enable Edit if not already.
- ii. Click on the pencil next to SWIMS under Document Access.
- iii. Role Name. Select DNR Staff then save.
- iv. Click on the piece of paper icon next to Document Access.
- v. Select Guest User for Role Name and NO for all of the flags. Save.



#### Upload a New Document inside the Project Wizard

The Documents tab in the Project Wizard contains a "widget" similar to the document upload screen, which allows you to upload a new document or associate an existing document with a project. Data entry is similar to the regular document upload screen, but with a couple of key differences:

- If you upload a document here, it will be automatically associated with the project being edited in the Project Wizard
- There's no way to change the document access here. You'll still need to edit a newly uploaded document in the regular document upload screen to change its access rights.



#### **Upload a New Photo**

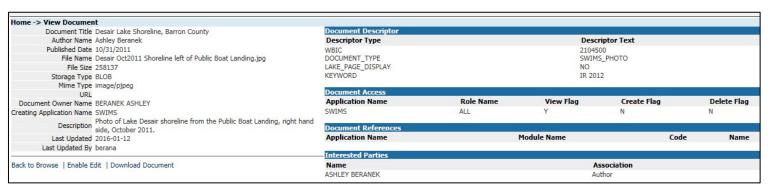
Follow the same general guidelines in the <u>Upload a New Document</u> section of this guide with the additional instructions below:

**Document title.** Be descriptive of what is in the photo. If it includes a waterbody include the waterbody name.

**Author.** This should be whoever took the photo.

#### **Document Descriptors.**

- i. **Document Type**: Photo
- ii. **WBIC**: If this is a photo of a waterbody then a WBIC is needed. The WBIC will link this photo to the waterbody record and to online information. One place these photos appear is in the online <u>Wisconsin Water Search</u> tool.
- iii. **Display on Lake Pages (General Lake Photo**): Options are 'YES' or 'NO' if you have a photo of a lake and it is representative of general conditions then this descriptor could be added with 'YES'. This is added because some photos linked to a WBIC are associated with the lake but do not show the lake (AIS specimens for example).
- iv. **Display Online (Yes/No)**: If a photo is for documentation purposes only or you do not have permission to display it online (contains image of a child and you do not have parental consent, for example) then this should be marked 'NO'.



This entry is for a photo that shows a lake shoreline so it isn't a representative lake photo (Display on Lakes Pages (General Lake Photo): NO). This photo can appear online and is not marked as private. It appears in the <a href="Photo Gallery">Photo Gallery</a> for Lake Desair on the external webpage.

#### **Upload a New CLMN Data Sheet**

Follow the same general guidelines in the <u>Upload a New Document</u> section of this guide with the additional instructions below:

**Document title.** Be exact when type in the title of the form and if you need to ad-lib use brackets.

- The CLMN Data sheet titles should look like one of these:
  - Wisconsin Citizen Lake Monitoring Network Secchi & Chem [Lake Name, Station#, Data Sheet from 2015]
  - Wisconsin Self-Help Lake Monitoring Secchi [Lake Name, Station#, Data Sheet from 2015]
  - Wisconsin Citizen Lake Monitoring Network Secchi [Lake Name, Station#, Data Sheet from 2015]
- The CLMN release form titles should be like this:
  - o Citizen Lake Monitoring Network Release of Claims [Person's Name, Lake Name, 2015]

**Author Name**. For these CLMN data sheets enter the name of the collector or the person who mailed it in.

Published Date. Usually today's date unless it is a report that has a published date.

**Description**. General description of the document. For the CLMN data sheets it should be something like "CLMN field data sheet. Data entered into SWIMS."

**Document type**. CLMN data sheets (or any field data sheets) and claims forms should have "Scanned, filled out forms or field notes"

Once these are uploaded the sheets should be filed in the appropriate binders.

#### **Upload a New Release of Claims Document**

Follow the same general guidelines in the <u>Upload a New Document</u> section of this guide with the additional instructions below:

**Document title**. These should all be titled "Citizen Lake Monitoring Network Release of Claims [Person's Name, Lake, Year]. If the waterbody name is unknown then only write the Person's Name and year the form was signed.

**Description**. General description of the document. For the CLMN claims form it should be something like "CLMN Claims sheet. Data entered into SWIMS."

**Document type**. CLMN data sheets (or any field data sheets) and claims forms should have "Scanned, filled out forms or field notes"

**Privacy**. These documents contain personal information that should not be open to the general public.

- **a.** Find the document and Enable Edit if not already.
- **b.** Click on the pencil next to SWIMS under Document Access.
- c. Role Name. Select DNR Staff then save.
- **d.** Click on the piece of paper icon next to Document Access.
- e. Select Guest User for Role Name and NO for all of the flags. Save.



**Interested Parties**. Add the author (person who signed the form) here as well. This links the document to their SWIMS profile.

Once these are uploaded the sheets should be filed in the appropriate binders.

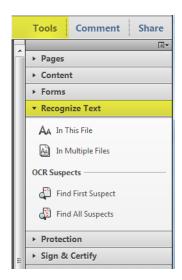
#### **Upload a New Grant Document**

Follow the same general guidelines in the <u>Upload a New Document</u> section of this guide with the additional instructions below.

Before uploading a grant document make sure that the text is readable. If you have Adobe Acrobat X (an editor) use the Recognize Text tool.

**Author**: This could be the group with the grant, but they also use consultants. Look through the document to determine the author. An example of a consultant is Onterra, LLC.

**Published Date**: This should be in the report somewhere. If you're given just a month and year use the 1<sup>st</sup> as the day.



#### **Document Descriptors**:

- **Document Type**: There are several types that these documents could fall under. Most will probably be "Final Report", but could be "Factsheet", "Monitoring Report". If it isn't a Final Report use your best judgment for the document type based on the information provided in the report.
- **WBIC**: Most of these documents should have a WBIC. Use the <u>lakes pages</u> or <u>water search</u> on the DNR webpage to find the correct one for the lake(s).
- **PDF Accessible**: If you can highlight/select text in the document then it is accessible and you would type YES. If you click on the page and it all turns blue (highlights) then type NO.
- **PDF Quality**: If you can access the text and nothing looks out of place (no missing graphics, tables, or figures, and the text is clearly readable) then it is Excellent. Again, use your best judgment here.
- **Titled Correctly**: Yes (if titled exactly with ad-libbed parts in brackets)
- **Display Online**: Yes

**Project:** All of these documents should have specific Grant ID and be attached to that grant project in SWIMS. The Grant ID is often used as the SWIMS project ID. If you type in the entire ID (example "AEPP-143-08") and nothing comes up try using the symbol % to broaden the search (example "AEPP% 143). The symbol % indicates to the search tool that you want everything that contains these words/numbers in the order typed regardless of what is between them. This is helpful when there are differences in spacing or dashes.

These documents may have multiple Grant IDs and in these cases attach the document to all relevant SWIMS projects.

#### **For Photos:**

Some grants will come with photos. These can be actual photo files or a PDF of photos. For these documents:

• **Title**: These documents probably won't have a title. If it is a PDF of photos you can title them "GrantID# Report Photos" using the specific Grant ID (if multiple IDs type in multiple). For

actual photo files, if you know it, you can name them according to what is in them (if a lake, use the lake's name), but also include the Grant ID number in the title.

- **Author**: Use your best judgment and if you're not sure leave it blank. You could use the grantee (example "Town of Three Lakes") as the author.
- Descriptors:
  - O **Document Type**: Photo
  - o **WBIC**: Add the proper WBIC.

Also attach these photos to the appropriate project(s).

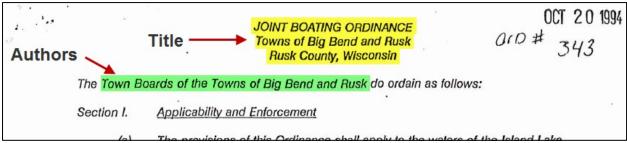
#### **Unload a New APM Document**

An Aquatic Plant Management document is a type of grant document. Follow the directions for a grant document but use the document types "Aquatic Plant Management Plan" and "Final Report".

#### **Upload a New Boating Ordinance Document**

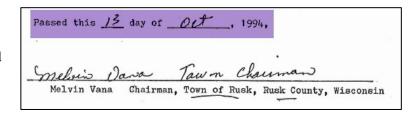
Follow the same general guidelines in the <u>Upload a New Document</u> section of this guide with the additional instructions below:

**Title**: Type the title as exact as possible as it appears in the document. This may end up being long. Often the name of the waterbody isn't mentioned, so in brackets following the exact title it is helpful to put in: [Waterbody name, County].



**Author**: This is usually a town or county. Type the author name into the Author blank, but also try to add an author in the "Interested Parties" area (will only work if their name is in SWIMS). We want documents associated with SWIMS profiles if possible.

**Published Date**: At the bottom of the ordinance there should be a date that it was passed. Sometimes there is only an unsigned copy. In these cases try to find any date associated with the document. This could be the date that it was received by the DNR.



**Description**: Add a short description of the ordinance. This is important because it shows up on the Boat

Ordinance website for the public.

Example of Title, Author, Publish Date, and Description in a SWIMS record:

#### **Document Descriptors:**

- Document Type: BOATING ORDINANCE
- **Keyword**: BOAT\_ORD
- Category: This is the type of ordinance or the topic(s) of the ordinance. For some it will be obvious, others may be more difficult. Use your best judgment to determine which category it should fall under. These are the options, but this is a text field so you will have to type these in:

- O BEHAVIOR-SAFE RIDING CAPACITIES, RACING
- o BOAT LAUNCHES
- o BUOY PLACEMENT
- o DESIGNATED MOORING AREA
- o DESIGNATED MOORING AREA PROCEDURES
- o HIGH WATER EMERGNECY SLOW NO WAKE
- HORSEPOWER LIMITS
- o HOUSEBOAT REGULATIONS
- o ICE TRAFFIC REGULATION
- o JET SKIS
- o LIGHTS
- o LITTERING
- o MOORING ORDINANCE
- o MOTORBOAT PROHIBITION
- NAVIGATION LANES
- o NO ANCHOR ZONE
- o NOISE LEVELS
- o 100 FOOT SLOW NO WAKE EXEMPTION
- o OPTIONAL ORDINANCE
- o OTHER

- o PARASAILING, PARAGLIDING
- o PFD REQUIREMENTS
- o RAFTS, PIERS
- o RESTRICTION DURING PERIODS OF HIGH WATER
- o RESTRICTION DURING PERIODS OF LOW WATER
- o RIGHT OF WAY
- o SEAPLANES
- o SKI JUMPS
- o SLOW-NO-WAKE AREAS
- o SLOW-NO-WAKE HOURS
- o SPEAR GUNS
- o SPEED LIMITS (MPH)
- o STATE BOATING LAWS ADOPTED ONLY
- o SWIMMING AREA
- o SWIMMING REGULATIONS
- WATER EXHIBITIONS AND RACES
- O WATER SKI DROP-OFF/PICK-UP AREA
- WATER SKIING RESTRICTIONS
- WATERCRAFT PROHIBITION
- O WATERWAY MARKERS
- Waterbody Text: Type the name of the waterbody or waterbodies involved.
- **PDF Accessible**: If you can highlight/select text in the document then it is accessible and you would type YES. If you click on the page and it all turns blue (highlights) then type NO.
- **PDF Quality**: If you can access the text and nothing looks out of place (no missing graphics, tables, or figures, and the text is clearly readable) then it is Excellent. Again, use your best judgment here when choosing Poor, Fair, Good, or Excellent.
- **Titled Correctly**: YES (if titled exactly with ad-libbed parts in brackets)

No WBIC is needed for these documents. They will be connected spatially to their waterbodies via another route.

Project: All lake Boating Ordinance documents should be linked to the project "Boating Ordinances", project ID "Lakes-BoatingOrdinances".

Document Descriptor, Reference, and Interested Parties Example:

Document Descriptor							
Descriptor Type		Descriptor Text					
DOCUMENT_TYPE WATERBODY_TEXT TITILED_CORRECT PDF_QUALITY ACCESSIBLE KEYWORD CATEGORY CATEGORY CATEGORY CATEGORY		BOATING ORDINANCE BOOTH LAKE AND LULU LAKE YES FAIR YES BOAT_ORD SLOW-NO-WAKE AREAS SLOW-NO-WAKE HOURS WATER SKIING RESTRICTIONS	S				
Document Access							
Application Name	Role Name	View Flag	Create Fla	g Delete Flag			
SWIMS	ALL	Y	N	N			
Document References							
Application Name	Module Name	Code		Name			
SWIMS SWIMS SWIMS	PROJECT DOCUMENT XREF ROI DOCUMENT XREF ROI DOCUMENT XREF	PROJECT ID: Lakes-BoatingOr ROI CODE: BOAT_ORD ROI CODE: BOAT_ORD	rdinances	PROJECT NAME: Boating Ordinances ROI NAME: Boating Ordinance ROI NAME: Boating Ordinance			
Interested Parties							
Name		Association					
Town of Troy		Author					

#### **Upload a New FERC Document**

FERC (Federal Energy Regulatory Commission) documents deal with hydroelectric dams. The dams have specific IDs so a lot of the labeling or organization of these documents will depend on the FERC ID.

Follow the same general guidelines in the <u>Upload a Document</u> section of this guide with the additional instructions below:



**Title**: The title will be long, but it needs to be as close to the document's title as possible. The yellow highlights are the parts that should be included in a title. Not all documents will be like the example above. Use your best judgment and if unsure ask (<u>Ashley.Beranek@wisconsin.gov</u>).

**Author:** The author for these documents will vary. If it is an official FERC document like in the photo above then the author should be the U.S. Federal Energy Regulatory Commission. If a report from a facility or company look through the document to see who wrote it (sometimes they use consultants).

**Date**: The date should be straightforward as it should be near the beginning of the document. For the official FERC document above use the Issued date.

#### **Document Descriptors:**

- Document Type: FERC Report
- **FERC ID**: Type in the FERC ID here. If there is more than one enter them separately. All numbers should be preceded by the letter P and will likely appear in the document file name or in the document itself.
- PDF Quality, PDF Accessibility, Titled Correctly: Don't forget to add these.

Drawing Tools **WBIC**: There may be multiple WBICs for the 2 0 0 Show Show Layers Legend waterbodies mentioned in the reports. This **FERC** Navigation Inventory spreadsheet will have the WBICs for each Find Location dam in some cases (WQ Bureau Info tabs). If no Assessment Unit WBIC is in the spreadsheet use the SWDV. As City, Town, Village highlighted in the image to the right use the Find O Coordinates - DD Location tab to locate the correct dam by name. As O Coordinates - DMS O Coordinates - WTM shown below then use the Point Identify button to O County see WBICs for the waterbodies around that dam. O Dam O DNR Management Unit You can verify that it's the correct dam by Floodplain Analysis crosschecking the FERC License No. It should O Impaired Waters 303(d) match the FERC IDs in the spreadsheet. If you find Lakes and Open Waters Rivers and Streams WBICs not in the spreadsheet please add them. SWIMS Station Other tools that may help are the <u>lakes pages</u> and Township, Range, Section USGS Gage Station water search. Watershed Basic Tools Identify Tools Drawing Tools Measuring Tools Maps & Data Find Location 1 2 Cancel Simple Results (1) Refine Results | Table View | Select All | Select None SANDSTONE RAPIDS □ x SANDSTONE RAPIDS Dam Metadata
Connect to Application Image Zoom to Feature | Pan to Feature | Add to Select Details Attributes Field Name Field Value 703 Dam Key Seg No SANDSTONE Dam Popular Name Dam Official Name SANDSTONE RAPIDS Field File Number 38.29 FERC License No 2546 Status OTHER LARGE Size WI PUBLIC SERVICE CORF UTILITY COMPANY Owner Type Hydraulic Height (feet) 42.0

**Description**: Brief description of what is in this document. Examples: Updated AIS monitoring plan, or Purple loosestrife monitoring for Park Falls on Wisconsin River in 2012.

**Project**: Search for a project using the ID field. Each FERC ID will have two of their own projects, one for AIS and one for Water Quality (WQ). Connect the document to the appropriate projects. Some documents have multiple projects because they're for multiple FERC IDs.

**People**: Add people, companies, or groups associated with the document if their name is in SWIMS.

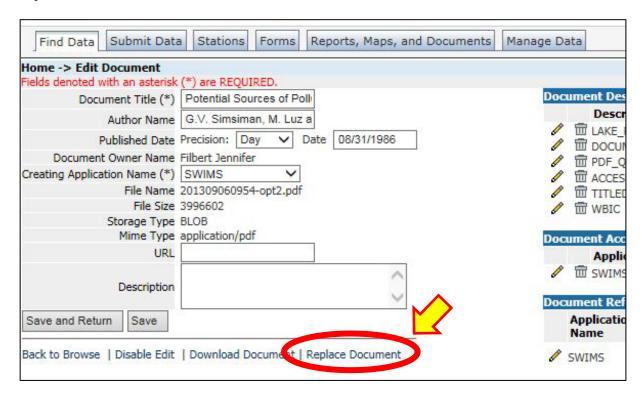
#### **Update an Existing Document**

Follow the guidelines in the <u>Search for a Document</u> section of this guide to locate the existing document you are going to update.

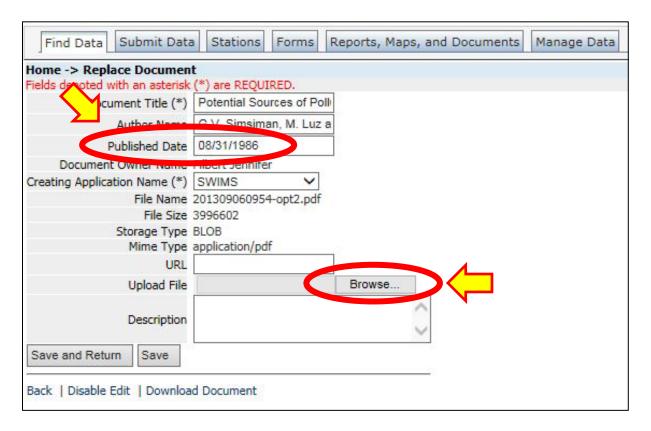
**Enter Edit Mode:** After you have located the existing document you are going to update, click on the pencil icon next to the document title to put the document into "Enable Edit" mode.



**Enable Document Replacement:** Locate the "Replace Document" text at the bottom of the left-hand column of information about the document. Click on the "Replace Document" text to link to the Replace Document screen.

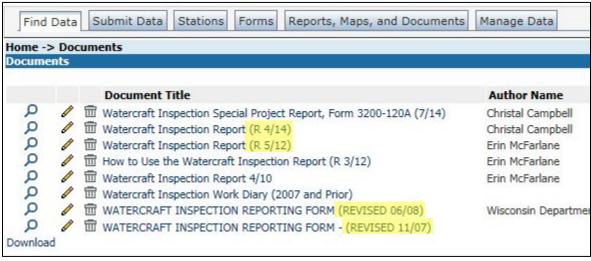


**Update Document Information:** Within this screen you can revise information about the updated document if it has changed, use the same general guidelines in the <u>Upload a New Document</u> section of this guide if you need to revise the document information, such as change the published date to today's date.



**Upload New Document:** Finally, upload the updated document by clicking on the "Browse..." button, and locating the updated document on your computer. This action will completely replace the original document with the updated document\*. Make sure to click "Save and Return" to ensure that your updated document is saved in SWIMS.

\*If you are uploading a document that has versions used during different time periods, or if you are unsure about removing the original document from SWIMS, please upload your document as a new document in SWIMS by following the guidelines in the <u>Upload a New Document</u> section of this guide. Examples include field forms, instruction manuals and methods, drafts of documents made public, etc. When you upload the new document, make sure to title the document in a manner so other SWIMS users will be able to identify that the document is a revision of the original document.



Example of multiple revisions of one document stored separately in SWIMS