








SWIMS Help Guide: People

Last Updated 02/04/2016

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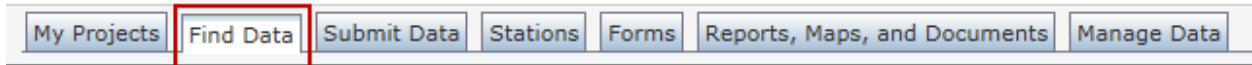
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Common SWIMS symbols and their use

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

Find a Person

On the “Find Data” tab click on “People”.



Find Data

Monitoring Data
Monitoring data from the State Lab of Hygiene, the field, and from other labs.

- Search Fieldwork Events
- Search Results

People
Find People in the database.

Worktable Data (Fieldwork With Problems)
Search monitoring data from the State Lab of Hygiene and from other labs that is in our Work Tables. This is often due to a lack of a monitoring station (on the lab slip).

Monitoring Stations
Search and select a monitoring station.

Reports
View reports available

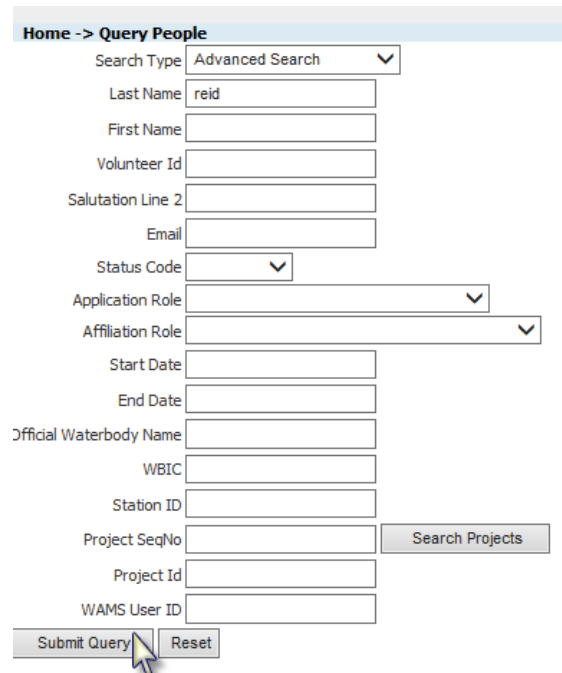
- Fisheries Re
- Macroinvert
- Macroinvert
- Chemistry C
- Project Stat
- TSI Summa

Resources of Interest
Resources of Interest
Find:

- Critical Habi
- Eurasian W
- Inland nrot

Type in the parts of the name that you know and hit “Submit Query”.

You will likely get the best results by just using Last Name and First Name. Try alternate spellings of both names or initials to be sure you don’t miss them.



Home -> Query People

Search Type:

Last Name:

First Name:

Volunteer Id:

Salutation Line 2:

Email:

Status Code:

Application Role:

Affiliation Role:

Start Date:

End Date:

Official Waterbody Name:

WBIC:

Station ID:

Project SeqNo:

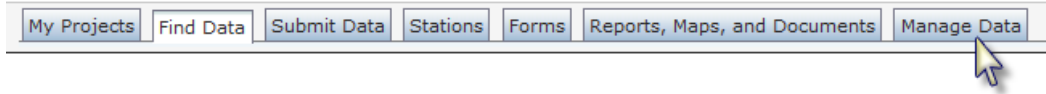
Project Id:

WAMS User ID:

Enter a New Person

- 1) Click on the “Manage Data” tab:

Surface Water Integrated Moni



- 2) Click on the “Add” next to “People.”

The 'Manage Data' page contains several sections with 'Add' buttons:

- Monitoring Data:** Monitoring data from the State Lab of Hygiene, the field, and from other labs. Includes 'Search Fieldwork Events' and 'Search Results' with 'Add' buttons.
- People:** Find People in database. The 'Add' button is highlighted with a mouse cursor.
- Worktable Data (Fieldwork With Problems):** Search monitoring data from the State Lab of Hygiene and from other labs that is in our Work Tables. This is often due to a lack of a monitoring station (on the lab slip).
- Monitoring Stations:** Search and select a monitoring station.
- Projects:** Projects describe the "why" behind monitoring data, a resource of interest, or an action.
- Grants:** Grants are a particular type of project. This specialized search screen allows more customized searching of River Grants, Nonpoint Source Grants and Lake Grants.
- SWIMS Digital Library:** Includes an 'Add' button.
- Reports:** View reports available in the SWIMS system. Includes a list of report types like 'Fisheries Reports', 'Macrobenthic Fieldwork Summary', etc.
- Resources of Interest:** Resources of Interest are areas of special interest. Includes a list of areas like 'Critical Habitat Areas', 'Eurasian Water-Milfoil Infestations', etc.

- 3) Enter the last name and first name; check to make sure there isn't a person with that name already in the system. If there is a matching name use the other information available to check to see if they are the same person (Salutation will be the waterbody they monitor).

Home -> Enter New Interested Party

Fields denoted with an asterisk (*) are REQUIRED.

ID* SYSTEM GENERATED

Collector ID 121919

Last Name Reid

First Name

Middle Name

Salutation Line 1

Salutation Line 2

Status Code ACTIVE

Title

Organization Name

Primary Email

Possible Matching Existing People			
View	Name	Salutation	Title
	Reid, Lisa		Wildlife Biologist
	Freid, Jane		
	Reindl, Jacob		Boat Inspector
	Reif, Michael	Calumet County	Wastewater Specialist
	Reis, Don		
	Reif, Megan		Volunteer
	Reidelbach, James	JORDAN LAKE	
	REIS, ANNE		Environmental Analysis and Review Specialist
	read, read		
	Reed, Rick		Supervisor

4) Enter all known information for the left hand side of the screen. Hit “Save and Return” before entering any information on the right-hand side of the screen. This makes sure that this information is saved. If you have more information to add go to the Editing a Person’s Profile section of this document, 1c.

- a. Salutation Line 1: This is their first name again or a name they go by (like Nate for Nathan). This could also be a couple, like Nate & Barb.
- b. Salutation Line 2: For CLMN volunteers this is the lake that they monitor. You may not always know this.
- c. Organization Name: If they belong to an organization it goes here (examples: Friends of Lake Wingra, Tetra Tech Company).
- d. Email address: enter if provided.
- e. Enter any of the other fields if you have that information.

Home -> Enter New Interested Party
Fields denoted with an asterisk (*) are REQUIRED.

ID* SYSTEM GENERATED
Collector ID 121917

Last Name Reid
First Name Nathan
Middle Name

Salutation Line 1 Nate
Salutation Line 2 Lake Wingra

Status Code ACTIVE
Title

Organization Name
Primary Email
Secondary Email

Bio Text

WAMS User ID

Save and Return

Back to Browse

Please reference the [Edit a Person](#) portion of this document to learn how to add more information.

Edit a Person's Profile

Find and open profile:

- 1) On the "Find Data" tab click on "People", type in last name, and click "Submit Query."
- 2) Either open profile then click "Enable Edit" on lower right-hand side or click pencil from search result page.
- 3) If you've just saved a new profile just click "Enable Edit."

The screenshot shows the 'Find Data' interface with the 'People' tab selected. The search results list several individuals, including 'Reid, Nathan'. A red arrow points from the 'People' link in the 'Find Data' section to the search results. Another red arrow points from the pencil icon next to 'Reid, Nathan' in the search results to the 'Home -> View People' profile page. A third red arrow points from the 'Enable Edit' link at the bottom of the profile page back to the search results. The word 'OR' is written in red between the search results and the profile page, indicating two ways to reach the profile.

Find Data

Monitoring Data
Monitoring data from the State Lab of Hygiene, the field

- Search Fieldwork Events
- Search Results

People
Find People in the database.

Home -> Query People

Search Type: Advanced Search

Last Name: reid

First Name:

Volunteer Id:

Salutation Line 2:

Email:

Status Code:

Application Role:

Affiliation Role:

Start Date:

End Date:

Official Waterbody Name:

WBIC:

Station ID:

Project SegNo: Search Projects

Project Id:

WAMS User ID:

Submit Query Reset

Home -> View People

Collector ID 121919

Name Reid, Nathan

Salutation Line 1 Nate

Salutation Line 2 Lake Wingra

Status Code ACTIVE

Title

Organization Name

Primary Email abcdefg@gmail.com

Secondary Email

Bio Text

WAMS User ID

Oracle User ID

Create User ID berana

Create Date 2014-09-11

Update User ID berana

Updated Date 09/11/2014

Back to Browse | Enable Edit

To enter data for any of the categories on the right-hand side click the small, white piece of paper icon.

The screenshot shows the 'Address' table header with columns: Address Type, Address, Start Date, and End Date. Below the header, it says 'No data available in table' and 'Showing 0 to 0 of 0 entries'. A small white paper icon is highlighted in the top right corner of the table area.

Address

Address Type	Address	Start Date	End Date
No data available in table			

Showing 0 to 0 of 0 entries

Previous Next

Addresses: type in as much information as known. For address type it is usually a home address unless they say otherwise. Some CLMN volunteers may have a summer or seasonal home on a lake.

The screenshot shows the 'Home -> Enter New Address' form. A dropdown menu for 'Address Type*' is open, showing options: HOME, SEASONAL, SECOND, SUMMER, WINTER, and WORK. The 'HOME' option is selected. The form includes fields for ID, IP SeqNo*, Priority*, Line1 Address, Line2 Address, City, State*, and ZIP. A 'Save and Return' button is at the bottom.

Home -> Enter New Address

Fields denoted with an asterisk (*) are REQUIRED

ID: ASSOCIATION

IP SeqNo*: DELIVERY

Address Type*: HOME

Priority*: SEASONAL

Line1 Address: SECOND

Line2 Address: SUMMER

City: WINTER

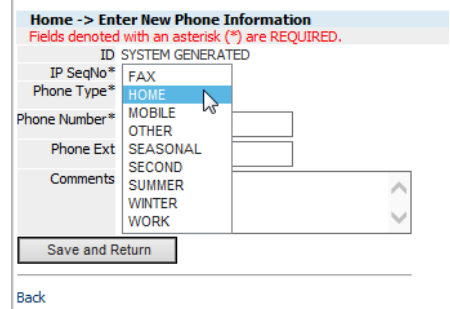
State*: WORK

ZIP:

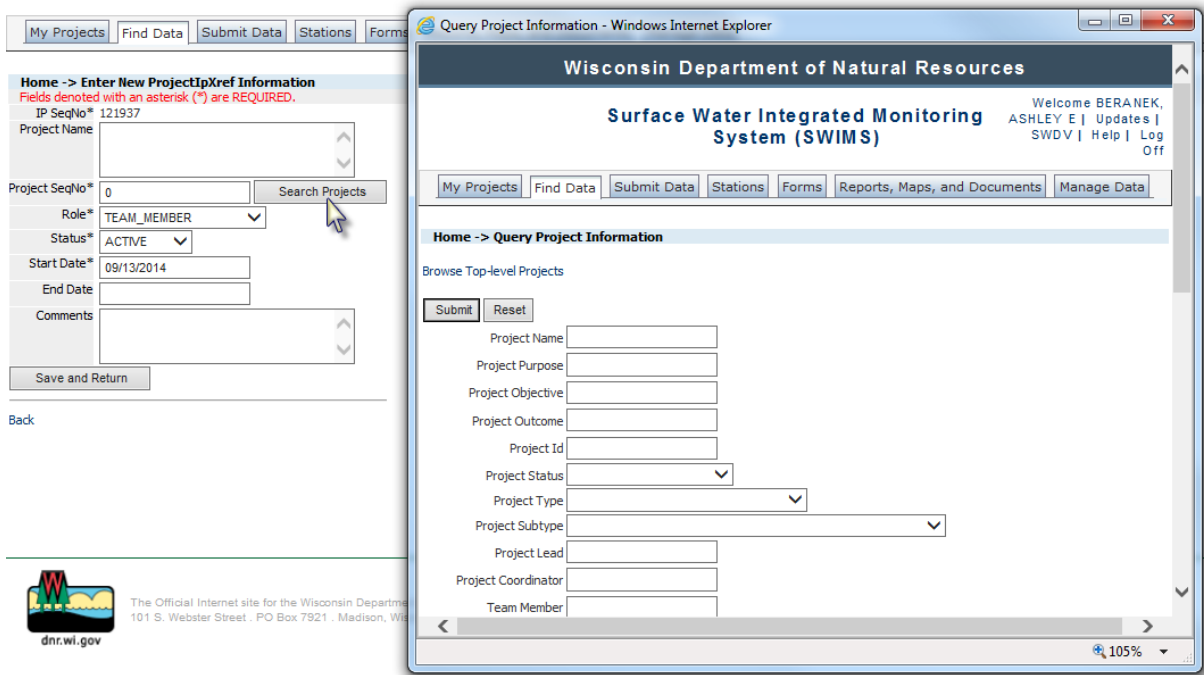
Save and Return

Back

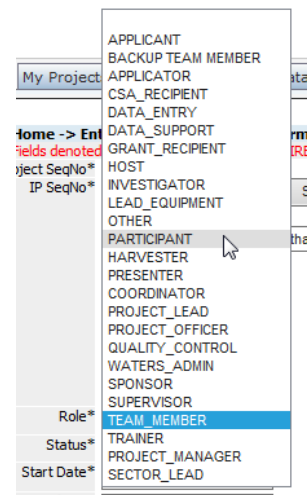
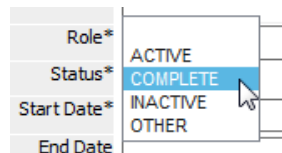
Phone numbers: type in as much information as known. Phone type is probably home unless they say otherwise.



Projects: To add a person to a project click “Search Projects” and this will open a separate window to use to find a project. It is best if you already have a project ID (See [Project](#) document) so that you can easily find the right one.



- 1) **Role:** Pick the most appropriate role for this person. Most of the time this will probably be “TEAM_MEMBER.”
- 2) **Status:** Pick the most appropriate status for this person. Most of the time this will probably be “ACTIVE.”



Communication and Training: This is for any notable communication (sent report, sent postcard, spoke on phone about ____, among others) or a one-on-one training done (separate from training projects in SWIMS).

- 1) **Communication or Training By Name:** Use the Quick Find by Name box to find the person who contacted or trained this person. If none is searched for the name of the person entering the data will be used.
- 2) **Date:** Date of the training or communication.
- 3) **Contact Program Code:** This will likely be “Lake Volunteer Program” for the CLMN, CBCW data you will enter.

-

- 4) **Contact Category Code:** This has a long list of options. They are broken into types and listed in alphabetical order: DATA_UPDATE, EQUIPMENT, LAKES_AWARD, LAKES_OTHER, MAILING, QUESTIONNAIRE, and TRAINING. For the most part these are intuitive.

-

- 5) **Method Code:** How was the person contacted or trained.

-

- 6) **Monitoring Year:** Optional. This is used to connect the material sent, communication had, or training done to the monitoring year applicable. For example, a report was sent to a volunteer in January 2013 about their monitoring from 2012 – so in this box 2012 would be written.

- 7) **Comments:** Optional. Any comments about the communication or training.
- 8) **Correspondence Text:** Optional. If available, enter the text from a communication (e.g email chain).
- 9) **Address Used Text:** Optional. Address of facility used for training or communication.

Equipment: If a person has been assigned equipment this is where it's logged.

Home -> Enter New IPEquipmentXref
 Fields denoted with an asterisk (*) are REQUIRED.

ID SYSTEM GENERATED

IP SeqNo* 121937

Equipment SeqNo*

Equipment Description*

Assigned Date*

Return Date

Comments

Inventory Count

[Back](#)

Document: If a person is the author of a document, photographer for a photo uploaded to SWIMS, or if there is a photo of them in SWIMS the document shows up here. You can add a document by clicking the paper icon.

Set Up to Enter Data

Volunteers are able to enter their own data if their profile in SWIMS is set up correctly. The first piece of information needed is the person's WAMS ID. The WAMS ID is picked by the volunteer by having them [self-register](https://on.wisconsin.gov/WAMS/home) here: <https://on.wisconsin.gov/WAMS/home>. Once they have registered they need to send their WAMS ID to you before they can log into SWIMS.

- 1) In the person's SWIMS profile click Enable Edit. Add the WAMS ID exactly as given to you into the WAMS ID line.
- 2) In order to give them permission to enter data into the database a person's Roles need to be updated. On the right-hand side click the piece of paper icon next to 'Roles'.
- 3) Select Category 'APPLICATION' and Role 'External Edit'. This gives them permission to enter data. Hit Save and Return.

Home -> Edit Role
Fields denoted with an asterisk (*) are REQUIRED.

ID SYSTEM GENERATED
IP SeqNo* 121937
Category* APPLICATION
Role* External Edit
Start Date* 06/12/2015
End Date
Comments
Save and Return Save

Home -> Edit People
Fields denoted with an asterisk (*) are REQUIRED.

ID* 121937
Collector ID 121937
Last Name Reid
First Name Nathan
Middle Name
Salutation Line 1 Nate
Salutation Line 2 Lake Wingra
Status Code ACTIVE
Title
Organization Name
Primary Email abcdefg@gmail.com
Secondary Email
Bio Text
WAMS User ID NReid
Oracle User ID
Last Updated 02/04/2016
Last Updated By berana
Save and Return Save
Back to Browse | Disable Edit | Edit Project Roles

- 4) Click the paper icon next to 'Roles' again. This time select Category 'PREFERENCES'. Depending on the type of volunteering the person is doing select the appropriate user type: AIS User, Lakes User, or Rivers User. These will give the person a customized screen when they sign into SWIMS. If they aren't a volunteer this portion doesn't need to be entered.

Home -> Edit Role
Fields denoted with an asterisk (*) are REQUIRED.

ID SYSTEM GENERATED
IP SeqNo* 121937
Category* PREFERENCES
Role* AIS User
Start Date*
End Date
Comments
Save and Return Save

- 5) Email the person to let them know that they are now able to enter data. Once this information is entered into SWIMS they should be able to log in right away.

Inactivating a Person

1. Go to the Find Data tab and click "People" to search for the person. Enter the last name and submit.
2. When the person's name comes up, click the pencil icon.
3. To easily access and edit the projects associated with a person click 'Enable Edit' and then 'Edit Project Roles' on the bottom left-hand side of the screen.

Save and Return	Save
Back to Browse Disable Edit Edit Project Roles	

4. Change status to Inactive for any project this person has stopped participating in, and put today's date as the end date. Hit Save and Return.

My Projects	Find Data	Submit Data	Stations	Forms	Reports, Maps, and Documents	Manage Data				
Edit Projects										
Fields denoted with an asterisk (*) are REQUIRED.										
Order of Project	Role Status (*)	Role Start Date (*)	Role End Date	Role (*)	Project Name	Project ID	Start Date	End Date	Project Status	
0	ACTIVE	04/02/2013		TEAM_MEMBER	Citizen Lake Monitoring - Water Quality - Lake Wingra; Deep Hole	CLMN-133320	04/05/2006	12/31/2006	ACTIVE	
Save and Return							Save			

My Projects	Find Data	Submit Data	Stations	Forms	Reports, Maps, and Documents	Manage Data				
Edit Projects										
Fields denoted with an asterisk (*) are REQUIRED.										
Order of Project	Role Status (*)	Role Start Date (*)	Role End Date	Role (*)	Project Name	Project ID	Start Date	End Date	Project Status	
0	INACTIVE	04/02/2013	02/04/2016	TEAM_MEMBER	Citizen Lake Monitoring - Water Quality - Lake Wingra; Deep Hole					
Save and Return							Save			

5. Then, if the person passed away, moved away, retired or is involved in no other projects, change the status for the person as a whole (on the left-hand side) to Inactive. Hit Save and Return.
6. You can optionally add more details about why they quit or retired under Communication and Training.

Communication or Training By Name	BERANEK, ASHLEY E
Recipient Name	Reid, Nathan
Date*	02/04/2016
Contact Program Code	Lakes Volunteer Program
Contact Category Code*	DATA_UPDATE - INACTIVATE
Method Code*	E-mail message
Monitoring Year	2015
Comments	Moved out of state winter 2015 and will not longer be able to sample Lake Wingra.
Correspondence Text	
Address Used Text	
Save and Return	

Home -> Edit People	
Fields denoted with an asterisk (*) are REQUIRED.	
ID*	121937
Collector ID	121937
Last Name	Reid
First Name	Nathan
Middle Name	
Salutation Line 1	Nate
Salutation Line 2	Lake Wingra
Status Code	INACTIVE
Title	
Organization Name	
Primary Email	abcdeft@gmail.com
Secondary Email	
Bio Text	
WAMS User ID	NReid42
Oracle User ID	
Last Updated	06/12/2015
Last Updated By	berana
Save and Return	Save
Back to Browse Disable Edit Edit Project Roles	