








SWIMS Help Guide: Projects

Last Updated 01/12/2016

Contents

| | |
|-------------------------------------|----|
| Search for a Project..... | 1 |
| Edit a Project..... | 4 |
| Edit a Project: Project Wizard..... | 8 |
| Create a New Project | 10 |

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. |

Search for a Project

- On the “Find Data” tab click on “Projects.”

The screenshot shows a web interface with a top navigation bar containing tabs: My Projects, Find Data, Submit Data, Stations, Forms, Reports, Maps, and Documents, and Manage Data. Below this is a 'Find Data' section with several categories:

- 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.
- Projects:** Projects describe the "why" behind monitoring data, a resource of interest, or an action. (This tab is highlighted with a mouse cursor in the image.)
- 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.

On the right side, there are sections for **Reports** (View reports available in the SWIMS system) and **Resources of Interest** (Resources of Interest are areas of special resource). The Reports list includes: Fisheries Reports, Macroinvertebrate Fieldwork Summary, Macroinvertebrate Fieldwork Detail, Chemistry Graphs by Project, Project Status Fieldwork Summary, and TSI Summary by Station and Year. The Resources of Interest list includes: Critical Habitat Areas, Eurasian Water-Millfoll Infestations, Upland protection areas, High Quality Wetlands, Sediment Inventory Sites, Sturgeon Waters, Walleye Waters, and Wild Rice Waters.

- The most often used search fields are the Project Name and Project ID fields. Each project has a unique Project ID. When entering data it is very important to make sure you have the correct project and for CLMN and CBCW data entry the project IDs and project names can make this fairly easy.
 - All Citizen Lake Monitoring Network (CLMN) water quality monitoring projects have the Project ID “CLMN-Station#” (example: “CLMN-033159”). So if you know the station you can find the project by putting that number in the Project ID field. If the station is unknown then try searching by typing CLMN in Project ID and the lake name in Project Name.
 - Most Clean Boats, Clean Waters projects will have “CBCW” in the project ID. Many lake associations got a special grant to fund CBCW activity so the 2015 data are in a separate project from all dates prior.
 - For citizen based AIS monitoring the project IDs are “CLMN-AIS-WBIC”.
 - Ice Observation project IDs are “Ice-WBIC”.

The screenshot shows a detailed search form with the following fields and options:

- Buttons: Submit, Reset
- Project Name: Text input field (highlighted in yellow)
- Project Purpose: Text input field
- Project Objective: Text input field
- Project Outcome: Text input field
- Project ID: Text input field (highlighted in yellow)
- Project Status: Dropdown menu
- Project Type: Dropdown menu
- Project Subtype: Dropdown menu
- Project Lead: Text input field
- Project Coordinator: Text input field
- Team Member: Text input field
- Equipment Lead: Text input field
- Grant Recipient: Text input field
- Last Name (any role): Text input field
- Activity Code: Text input field
- QA Plan Flag: Dropdown menu
- Volunteer Implement Flag: Dropdown menu
- DNR Staff Implement Flag: Dropdown menu
- Enforce Project Flag: Dropdown menu
- Start Date: From: [] To: []
- End Date: From: [] To: []
- Station ID: Text input field
- WBIC: Text input field
- Official Waterbody Name: Text input field
- County: Dropdown menu
- Watershed: Dropdown menu
- GMU: Dropdown menu
- WMU: Dropdown menu
- Lab Account Code: Text input field
- Overall Status: Dropdown menu
- Buttons: Submit, Reset

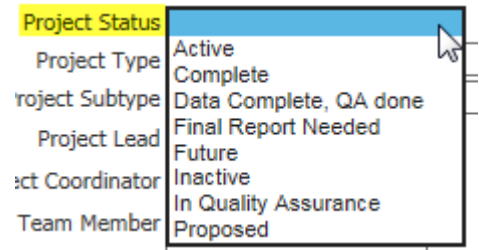
You can use other known information to find a project, with or without the Project Name or Project ID fields. Use any combination of fields that will help you find what you're looking for. If you can't find the project I recommend broadening your search by using fewer search parameters.

- Search by Project Type (listed below). Each Project Type will have its own Project Subtype—these will help you narrow your search.

- Aquatic Invasive Species Monitoring
- Aquatic Invasives Education
- Aquatic Invasives Grant
- Aquatic Plant Management
- Aquatic Plant Monitoring
- Aquatic Plant Research
- Baseline Monitoring
- Citizen Based Stream Monitoring
- Citizen Lake Monitoring
- Clean Water Act Reporting
- Competitive Projects
- County Land and Water Plan
- Critical Habitat Designation
- Evaluation Monitoring
- Fish Contaminants
- Fisheries Survey
- General Category
- Grant Project
- Great Lakes
- Great Lakes Grant Project
- Great Lakes Restoration Initiative
- Impairment Documentation
- Lake Water Quality Monitoring
- Lakes Grant
- Loon Monitoring
- NPS Grant
- Other Monitoring
- Project Riverine Early Detectors (RED)
- Purple Loosestrife
- River Grant
- Sediment Studies
- Statewide Inventory
- Targeted Monitoring
- Targeted Watershed Approach
- TMDL/303d List Project
- Watercraft Inspections
- Watershed Planning

- Search by person attached to the project using the “Last Name (any role)” field.

- Select Project Status – this is helpful when you are looking only for Active projects.



- WBIC – if any stations are attached to the project you can use the waterbody identification code to find it. If there are no stations attached to a project then it will not turn up with this type of search.

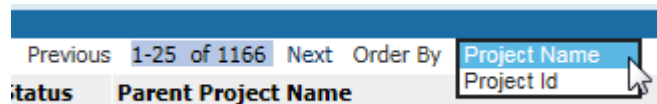
- Project Purpose, Project Objective, or Project Outcome – these fields search project descriptions and searching this way allows you to search for words written in any of these fields. The simpler the search terms the better. An advantage of searching these fields is that you can find projects that pertain to a certain species or sampling that does not show up in the title. For example, typing in the word “loosestrife” into the Project Purpose will turn up hundreds of projects, many of which did not have “loosestrife” in their title. A caveat to searching these fields is that it can only search what people have entered – if there is little or no description then those projects won’t show up.

Tips

- If you know some key words in the project title or ID but not the exact wording you can use the % symbol between key words. For example, the title search “Racine %coli” returns “Racine Beach E.Coli Study-Racine Co.”
- In the search results any project name that is dark blue instead of black has child projects. These are handy when looking for a parent project. In the search results pictured below the project “AIS Incident Reports” is blue because it is the parent project for the three projects below it.

| | Project Id | Project Name | Project Type | Status | Parent Project Name |
|--|----------------|---------------------------------------|-------------------------------------|--------|---|
| | AIS-INCIDENT | AIS Incident Reports | Aquatic Invasive Species Monitoring | Active | Other Aquatic Invasive Species Monitoring |
| | AIS-INCIDENT-1 | AIS Incident Reports - Adams County | Aquatic Invasive Species Monitoring | Active | AIS Incident Reports |
| | AIS-INCIDENT-2 | AIS Incident Reports - Ashland County | Aquatic Invasive Species Monitoring | Active | AIS Incident Reports |
| | AIS-INCIDENT-3 | AIS Incident Reports - Barron County | Aquatic Invasive Species Monitoring | Active | AIS Incident Reports |

- You can sort your results by Project Name or Project ID so similar ones will end up next to one another.



Edit a Project

After finding a project click the pencil to get into the project or if you're in the project click Enable Edit under the information on the left hand side of the screen. A pencil will edit existing information and the white paper icons will let you enter new information. To enter data for any of the categories on the right-hand side click the small, white piece of paper icon.



- 1) **Add People.** To add participants click on the small, white piece of paper icon next to "People/Organizations Involved" (Another way to do this is shown in Edit a Project Using Project Wizard). This is the screen you will get:

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

Project SeqNo* 102227809

IP SeqNo* 0

Quick Find by Name:

Role* TEAM_MEMBER

Status* ACTIVE

Start Date* 09/11/2014

End Date

Comments

[Back](#)

- a. Start typing the person's last name in the "Quick Find by Name" spot. Once the name you're looking for appears, click on it.

You can also use the "Search People" button to find a person just like in the [Find a Person](#) portion of the People SWIMS Guide. Once you've found the right name you can use the white arrow in the black circle to use that person.

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

Project SeqNo* 102227809

IP SeqNo* 0

Quick Find by Name: reid

Reid, Lisa
Reid, Nathan
Reidelbach, James

Wisconsin Department of Natural Resources
Surface Water Integrated Monitoring System (SWIMS)

Welcome BERANEK, ASHLEY E | Updates | SWDVI | Help | Log Off

My Projects Find Data Submit Data Stations Forms Reports, Maps, and Documents Manage Data

SWIMS Home | Interactive Maps | Search Monitoring Data

New Search

Show 10 entries

| Name | Collector Id | Salutation | Title | Organization Name | Email | Status | Updated |
|----------------|--------------|------------|-------------|-----------------------|-------------------------|--------|-----------|
| Breider, Brian | 92919 | | | Milwaukee Riverkeeper | nortonbsa1964@yahoo.com | ACTIVE | 07/14/201 |
| Freid, Jane | 62539 | | | Twin Bear Campground | | ACTIVE | 09/26/20C |
| Reid, Nathan | 121937 | | Lake Wingra | | abcdeft@gmail.com | ACTIVE | 06/12/201 |

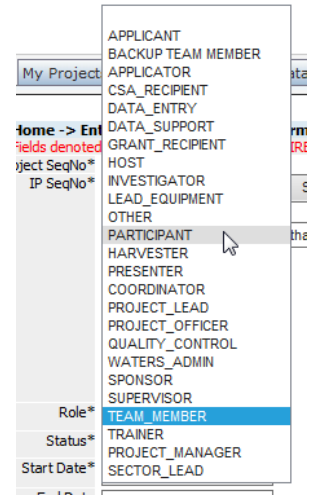
Showing 1 to 3 of 3 entries

First Previous 1 Next Last

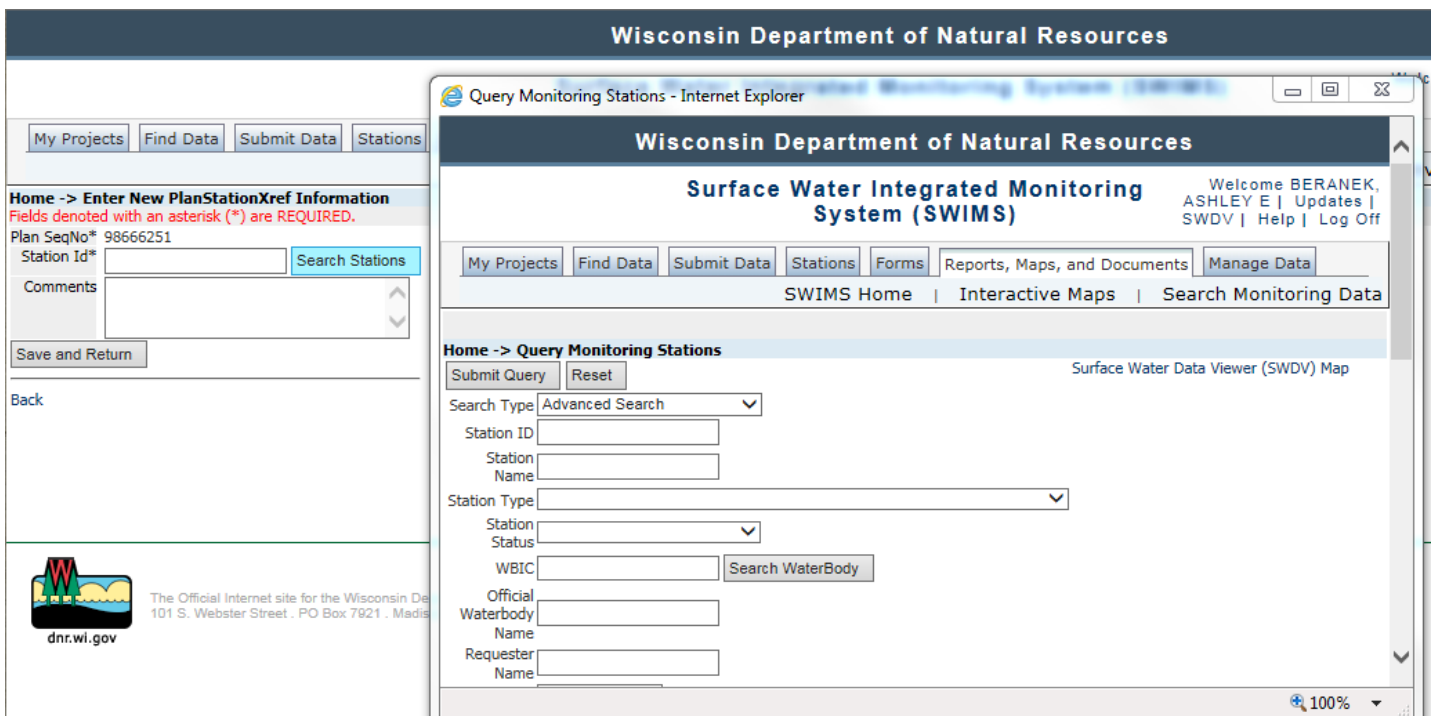
Download

If no matching names appear you may need to enter the person into SWIMS before you can add them to a project. See the [People SWIMS Guide](#).

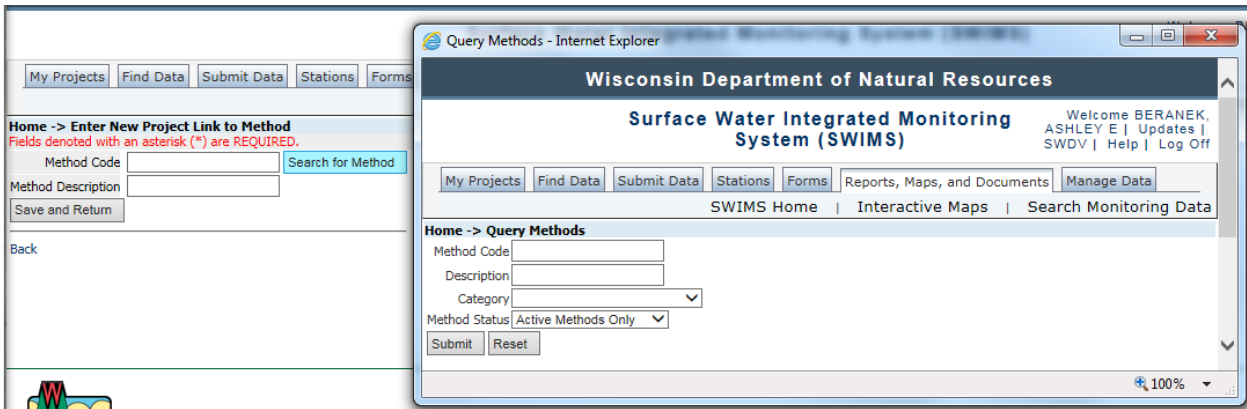
- b. Edit the “Role” of the person. The default is “TEAM MEMBER”. Other commonly used roles are “COORDINATOR” and “PROJECT LEAD”. Use whichever are most relevant to your project.
- c. Choose a status. Most commonly this will be “ACTIVE” unless you’re entering a training or historical project.
- d. Enter a Start Date – this can be the same as the project start date.
- e. Click “Save and Return” to save this entry.
- f. To add another person start this process again.



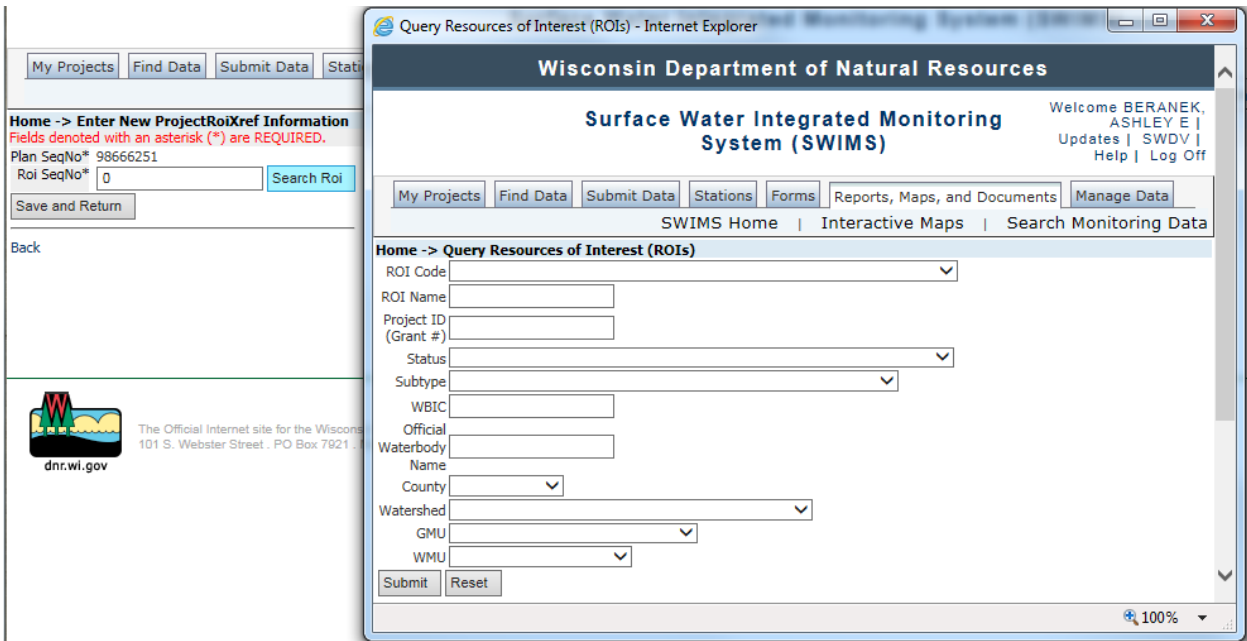
- 2) **Add Stations.** If your project involves taking samples then you will need to add the stations to the project in order to enter the data later. Click on the white paper icon and then on the “Search Stations” button. Once you find the correct station use the white arrow in the black circle button to back fill the information. Then hit “Save and Return”. To add more stations repeat this process.



- 3) **Add Methods.** If you know the methods used you can add them using the “Search for Method” button. If you’re unsure you can copy the methods out of similar projects (only do this if you know those projects used the same methods).



- 4) **Field Work.** This is where you will find data associated with this project, but you won’t enter data this way. If you would like to enter data please see the “[Enter Data](#)” SWIMS Guide.
- 5) **Add Resource of Interest.** If there are any ROIs associated with this project you can add them here. These could be invasive species ROIs or Boat Ordinance ROIs for example.

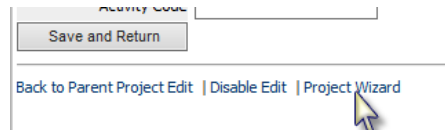


- 6) **Add Documents.** If there are any documents in SWIMS that you would like to associate with this project click the paper icon and then the “Associate Existing Document” button to search for it. This page gives you the option of entering a new document as well – please follow the guidelines in the [Document SWIMS Guide](#).

- 7) **Add Parameters.** If field or lab work is being done this is where you enter the parameters to be collected. This section is to show what is being collected, not for any results.
- 8) **Add Lab Accounts.** This is for the associated lab account ID (funding source). Having this associated with the project will help the data coming from the lab end up in the correct project. Not all projects will have this.
- 9) **Add Forms.** If you will need to manually enter data for your project then you will need to have a form attached. The correct form depends on what type of data you are entering. Please work with Jennifer Filbert (Jennifer.filbert@wisconsin.gov) or Ashley Beranek (Ashley.beranek@wisconsin.gov) if you do not know what form to attach.
- 10) **Add Actions.** If you have any actions to associate with this project you can add them here. Examples include training volunteers to find AIS, biological monitoring, carp removal, among others. You can search for and add these if they are already created. If you need to create a new Action open a new SWIMS tab, click on the “Manage Data” tab, and click on the “Add” button next to Actions. Please follow the guidelines in the [Actions SWIMS Guide](#).

Edit a Project: Project Wizard

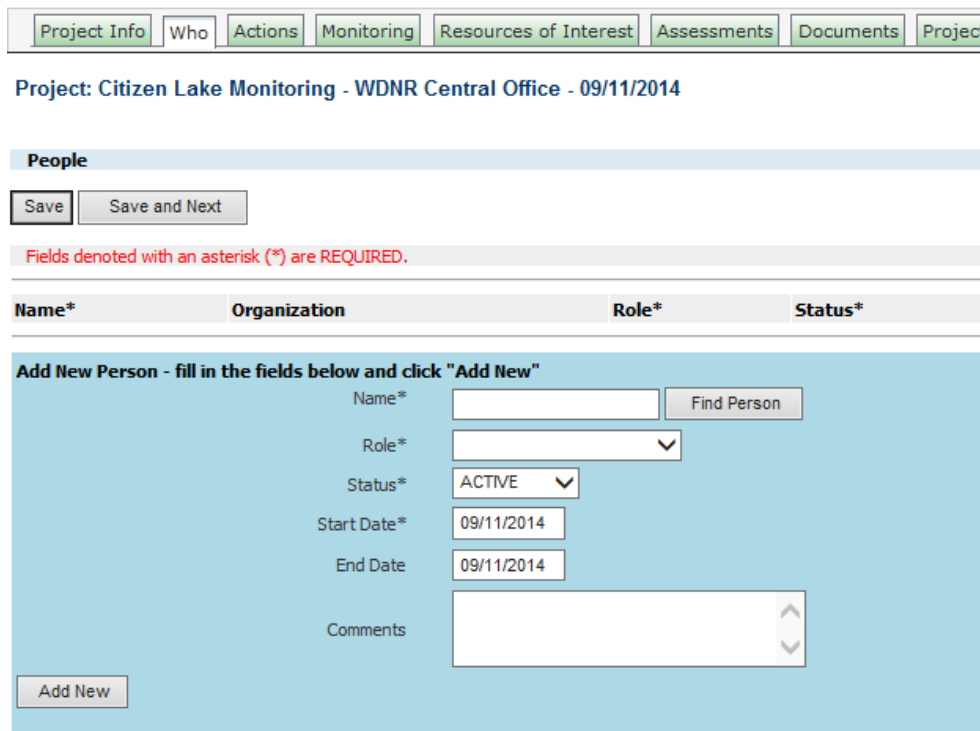
The Project Wizard is an alternate way to enter data into a project. To get to the Wizard you can either click on the Wizard Icon after you've found your project through a search (see [Common SWIMS Symbols](#)) or if you're in the project click "Project Wizard" at the bottom left hand side of the screen. The types of items to enter that were on the right-hand side of the screen are now tabs at the top.



Instructions below highlight the differences between the Wizard and the other methods described above. The Wizard allows for more project management including adding information on the project's status, budget, and funding. It also gives you the tools to make project reports.

Enter people. Click on "Who". You can find people the same way as before. The Wizard will automatically populate the Status as Active and the Start and End Dates will match the project's.

Once all of the information is entered click "Add New" and this will enter the person into the project. You can repeat this until you've added all the people (limit is about 50 people with this method).



Project: Citizen Lake Monitoring - WDNR Central Office - 09/11/2014

People

Save Save and Next

Fields denoted with an asterisk (*) are REQUIRED.

| Name* | Organization | Role* | Status* |
|-------|--------------|-------|---------|
|-------|--------------|-------|---------|

Add New Person - fill in the fields below and click "Add New"

Name* Find Person

Role*

Status* ACTIVE

Start Date* 09/11/2014

End Date 09/11/2014

Comments

Add New

Monitoring. The monitoring tab covers Stations, Forms, Methods, Equipment, Parameters, Lab Account Codes, Fieldwork Events, and Labslips. To edit any of these you need to click on the button for it.

Project: Clean Water Act 2016

Monitoring Stations

Stations | Forms | Methods | Equipment | Parameters | Lab Account Codes | Fieldwork Events | Generate Labslips

Save Save and Next

Fields denoted with an asterisk (*) are REQUIRED.

| Station ID | Name | Comments | Lat / Long | Map | Delete Association |
|------------|------|----------|------------|-----|--------------------|
|------------|------|----------|------------|-----|--------------------|

Associate New

Assessments. The Wizard allows you to see associate Impaired Waters Assessment Units (information from the WATERS database).

Project Status. The Wizard allows you to keep track of the progress of a project.

Budget. The Wizard allows you to enter project funding sources.

Review. This tab allows you to see all of the information available for this project. You can download a project summary report or create a customized summary report for this project.

To get out of the Project Wizard view click the “Exit Wizard” tab.

Create a New Project

The first step in creating a new project is to find where it belongs in SWIMS. Projects are nested into Parent-Child projects, often organized by topic. The top level projects can be seen on the 'Reports, Maps, and Documents' tab in SWIMS.

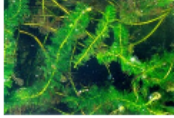
My Projects Find Data Submit Data Stations Forms **Reports, Maps, and Documents** Manage Data SWIMS Home | Interact

All top level projects in SWIMS


Browse Reports, Maps and Document

- ▶ Aquatic Invasives (AIS)
- ▶ Bacteria & Plankton (Paid Private)
- ▶ Biomonitoring Projects
- ▶ Citizen Based Stream Monitoring
- ▶ Clean Water Act Integrated Reporting
- ▶ Clean Water Act Triennial Standards Review
- ▶ EPA Coastal Condition Assessments
- ▶ Electronic Guidance and Documents (EGAD)
- ▶ Fisheries Projects
- ▶ Follow UP Monitoring For Impairment Decisions
- ▶ Great Lakes
- ▶ Impaired Waters and TMDLs
- ▶ Lakes
- ▶ Master Project for Fish Contaminant Monitoring
- ▶ Monitoring & Assessments Training and Workshops
- ▶ Monitoring Field Procedures and Methods
- ▶ Monitoring Strategy 2014 Update
- ▶ Navigability Determinations
- ▶ Partner Agency Work
- ▶ Photo and Presentation Library
- ▶ Polluted Runoff Grants
- ▶ Remediation & Redevelopment
- ▶ Rivers Grants
- ▶ Rivers, Streams - Uncategorized Projects
- ▶ Rivers, Streams - Water Program
- ▶ SWIMS Management
- ▶ Sediment Monitoring
- ▶ Springs
- ▶ Stormwater Permit Location Interim Project
- ▶ USGS Projects
- ▶ UW Stevens Point Macroinvertebrate Analyses
- ▶ Uncategorized Projects
- ▶ Wastewater Related Monitoring
- ▶ Water Quality Management Plans
- ▶ Water Quality Standards Program Analyses
- ▶ Watersheds
- ▶ Wetlands
- ▶ Wild Rice Waters


Explore SWIMS




Aquatic Invasive Species




Critical Habitat Areas



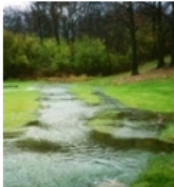
TMDL and 303(d) Impaired Water Project




Citizen Lake Monitoring




Citizen Based Stream Monitoring




Targeted Runoff Urban Construction Grants



Long-Term Trend River Monitoring



Rivers, Streams Baseline Monitoring



Clean Boats, Clean Waters

Specific topics/projects of interest, but not necessarily top level projects.

If you ever create a project without a parent project it will end up in the list above. This is one starting point but may not be the best one unless the project you're creating is easily categorized.

Another way to find the correct parent project is to search for related projects (see [Search for a Project](#) portion of this document). Once you have the correct project you can start the process of creating your new project.

Create Child Project. When in the parent project click on "Enable Edit" on the bottom of the left-hand side of the screen. This will give you the ability to add a child project by clicking on the small, white paper icon next to "Child Projects."

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

ID 99662565

Parent Project Name Citizen Lake Monitoring - Volunteer Training Sessions

Parent Project SeqNo 51867897

Project Name* Citizen Lake Monitoring - Training Sessions 2014

Project Id* CLMN-Training-2014

| Child Projects | | | | | | |
|----------------|---|---|--|----------------------------|------|------------|
| X | X | X | Project Name | Project Id | WBIC | Start Date |
| | | | Citizen Lake Monitoring - Lulu Lake Nature Preserve 07/12/2014 | CLMN-Workshop-20140712 | | 07/12/2014 |
| | | | CLMN - Refresher Training - 2014 | CLMN - Training - 20140510 | | 05/14/2014 |
| | | | CLMN-Refresher Training - 2014 | CLMN-Training-20140315 | | 03/14/2014 |

| People/Organizations Involved | | | | | | | |
|-------------------------------|---|---|------|------|------|------------|----------|
| X | X | X | Name | Org. | Role | Start Date | End Date |
| | | | | | | | |

| Stations | | | | | | |
|----------|---|---|------------|--------------|------------|------|
| X | X | X | Station Id | Station Name | Water Body | WBIC |
| | | | | | | |

Enter the following information:

- Project Name.** Include the most pertinent information. If there are similar projects in SWIMS or other child projects follow the style of their titles if possible.
- Project ID.** All IDs need to be unique. Again follow the style of similar projects or other child projects if possible. There should be no spaces in the IDs.
- Project Type.** There are many different project types ([listed in Search for a Project](#)) so choose the one that fits best.
- Project Subtype.** Each project type has its own subtypes. Again, pick the one that fits best. This can be left blank if you're unsure.
- Project Status.** The most commonly used ones are "Active" and "Complete". Unless you are entering a training or historical project this will most likely be "Active".
- Start and End Date.** A start date needs to be entered here. If you don't know the end date you can leave it blank though SWIMS will automatically enter 12/31/2099 if you do.
- Project Description.** Enter a description of the project. The more description the better.
- Project Objective, Project Outcome, Study Design, QA Measures, Comments, Public Description.** The more information you can provide the better because this will essentially become an archive for this project and its results. Some of this information you won't have right away, but if possible come back later and fill out these fields. For the **Public Description** field, if you leave this blank it will be populated by what is entered in the **Project Description** field.

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

ID 102227809

Parent Project Name Citizen Lake Monitoring - Training Sessions 2014

Parent Project SeqNo 99662565 Search Projects

Project Name* Citizen Lake Monitoring - WDNR Central Office - 09/11/2014

Project Id* CLMN-Training-20140911

Project Type*

Project Subtype

Project Status

Status Date

Start Date

End Date

After all of this information is entered click "Save and Return" at the bottom of the page. This will take you back to the parent project. To add people and other information find your training under "Child Projects" and click the pencil icon.

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

ID 99662565

Parent Project Name Citizen Lake Monitoring - Volunteer Training Sessions

Parent Project SeqNo 51867897 Search Projects

Citizen Lake Monitoring - Training

| Child Projects | | | | | | |
|----------------|---|---|--|----------------------------|------|------------|
| X | X | X | Project Name | Project Id | WBIC | Start Date |
| | | | Citizen Lake Monitoring - Lulu Lake Nature Preserve 07/12/2014 | CLMN-Workshop-20140712 | | 07/12/2014 |
| | | | Citizen Lake Monitoring - WDNR Central Office - 09/11/2014 | CLMN-Training-20140911 | | 09/11/2014 |
| | | | CLMN - Refresher Training - 2014 | CLMN - Training - 20140510 | | 05/14/2014 |
| | | | CLMN-Refresher Training - 2014 | CLMN-Training-20140315 | | 03/14/2014 |

Please see the [Edit a Project](#) section to learn about adding additional information to your project.