



Biological Sample Database Procedure Manual

Manage Sample Inventory

Sample Definitions

Manage Sample Storage

Sample Readings

Query Builder

Maintenance

National Marine Fisheries Service

Southeast Fisheries Science Center

Panama City Laboratory

Table of Contents - Managing Sample Inventory

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Introduction

This document outlines how to use the pages for managing inventory with the Biological Sample Database (BSD) system. The inventory is made up of biological samples taken from fish by NMFS port agents. Port agents conduct fishing trip interviews with fishers when they return to the dock to landed their catch. The Port agent collects information about the fishing trip such as when the trip took place, the type of gear used, etc. In some cases the port agent may take biological samples from the fish being landed. These samples may include otoliths, scales, spines, and/or gonads. Other specialty samples types may also be taken, but are not part of the BSD system.

After the interview the port agent will enter all of the information into a system hosted at the Southeast Fisheries Science Center (SEFSC) called the Trip Interview Program (TIP). The port agent then package up any samples obtained, along with a print out of a TIP report of the interview, and send them to either the Panama City FL or the Beaufort NC lab. When the samples are received at the lab the information is entered into the BSD system through the Receive Inventory process.

The Biological Sample Database (BSD) system and the Trip Interview Program (TIP) system are linked. TIP is used by port agents and BSD is used by the labs. When samples (inventory) are received at the labs the information is automatically copied from the TIP system into without the need for duplicate data entry.

The Southeast Fisheries Science Center (SEFSC), the Panama City Florida lab, and the Beaufort North Carolina lab worked together to design and develop the Biological Sample Database (BSD) system.

Managing Sample Inventory

The Manage Inventory pages of the system are where users manage the receiving and moving of Trip Interview Program (TIP) fish part samples. The primary actions for managing inventory include:

- Receiving Inventory - entering interviews into BSD for samples received at the lab
- Searching Inventory - search for interviews and samples to enter comments, move samples to a new location (different lab), or record/log that a sample is missing (unknown location)

Receiving Inventory is the first step in adding samples to the BSD system. Once the samples have been added they can be included in sample definitions, readings, and reporting.

Receiving New Interview Samples

Menu Navigation: Menu → Manage Inventory → Receive Inventory

Purpose: Manage Inventory - Receive Inventory is used when samples are received at the lab.

An NMFS Port Agent conducts interviews and records information into the Trip Interview Program (TIP) system. During the interview, the port agent may obtain fish samples which are then sent (postal mail) to the lab. When the samples (fish parts such as otoliths) are received at the lab, the Receive Inventory module can be used to enter the information into BSD.

Typical Actions

- Receive the interview samples - which imports the TIP interview information automatically from the TIP system
- Record any missing samples (assign to unknown location)
- Record comments (for the interview, collection (interview/species), or for a particular sample)

Screen Shots (page layout)

Receiving a New TIP Interview (page)

Bio Sample Database

Wednesday, October 20, 2010
JAY OLEARY
Administrator - BEAUFORT

Home Manage Inventory Sample Definitions Sample Storage Management Sample Readings Query Builder Maintenance Logout

Receive Inventory

Source: Species: Src/Interview #: Retrieve Data
TIP ALL 295642

1) Choose the source (TIP), species (optional), and enter the source's interview number to receive the new samples

Receiving new TIP Interview samples at the lab

Receiving a New TIP Interview (features)

- Choose the source providing the samples to the lab (for BSD version 1.0 always choose TIP)
- Choose a species (optional)
 - Although the user can specify a particular species from the TIP interview, when receiving a new TIP interview the entire interview (including all species) is imported to the BSD system
- Enter the source interview number
 - This is the interview number provided by the source, such as the TIP Interview number

Reviewing/Confirming Receiving of New TIP Interviews (page)

Receive Inventory

Species: ALL Src/Interview #: 295642 Retrieve Data

Interview #: 295642 (09/16/2009) Mode: CM State: FL
 Collector: C.DENNIS Gear: HL County: VOLUSIA

Collector Notes: Capt Doug Fi

Comments: (max. 200 chars)

Location assigned by default to the user's lab. Change to Unknown for missing samples or transfers

Interview Totals: Otoliths: 17

ALMACO JACK
 Coll #: Comments:

Tag #	T.Len	F.Len	Sex	Type	Location	Comment (max 120 chars)
2009028239	679	U	OTOLITH_1	BEAUFORT		

Species Totals: Otoliths: 1

GAG
 Coll #: Comments:

Species Totals: Otoliths: 5

GRAY SNAPPER
 Coll #: Comments:

Species Totals: Otoliths: 1

RED SNAPPER, LUTJANUS CAMPECHAN
 Coll #: Comments:

Species Totals: Otoliths: 6

SNOWY GROUPER
 Coll #: Comments:

Species Totals: Otoliths: 2

VERMILION SNAPPER
 Coll #: Comments:

Species Totals: Otoliths: 2

NOT RECEIVED

Open/close collection view. Click the [+] to open (see all the samples) or [-] to close

Sample totals by type and species

Enter PC Collection Numbers

To close the page without receiving or saving changes

Cancel Receive

To receive the inventory samples (and make them available for use)

A new Interview starts as Not Received. After you receive the samples the status is change to Received.
 - Not Received (yellow) or
 - Received (green)

Species are grouped by collection

Reviewing/Confirming Receiving of New TIP Interviews (features)

- New TIP interview are initially displayed as "Not Received"
 - Not Received tells the user that this is the first time this interview is being reviewed for receiving
 - A Received interview has already been received to one of the labs
 - Note: users can see interviews received at other locations (labs) if they specify the other location when using the Inventory Search pages
- TIP Interview information is displayed at the top of section of the page
 - I.e. Collection Notes: are comments entered into the TIP system by the port agent
- Each species is displayed in its own section
 - Click the [+] to expand the section and view the individual samples and Tag#
- During receiving, the location is automatically assigned to the users default location
 - Change the location to "Unknown" to indicate a sample is missing (not received)
 - Note: changing the location is how to transfer samples to other locations such as labs or colleges
 - Locations can be maintained using the Maintain LOV pages
- Sample totals are displayed under each species (interview/species or collection) section
- Each species section has an area to enter the PC Coll Number.

Search for Existing (Received) Interview Samples

Menu Navigation: Menu → Manage Inventory → Search Inventory

Purpose: Search Inventory is used to search (through) the existing sample inventory located at the lab.

Note: Interview samples must first be received (using Receive Inventory) to be found using the search inventory pages.

When TIP interview samples are physically received at the lab, the information is logged into the Biological Sample Database (BSD). Once the sample information is in the BSD system, the data are available for other purposes such as searching, building sample definitions, entering readings, and reporting.

The Search Inventory pages have been designed to help users quickly locate the sought after inventory samples. The pages include several search criteria which can be used in combination to filter the results.

Typical Actions

- Determine the best search criteria available, such as: Source Interview ID, Fish Tag #, Species, etc.
 - Based on the information available different searches can be performed
 - For instance, a Fish Tag number is unique and can be used by itself, the species is unnecessary (even if it is known)
- Enter search criteria values in the appropriate fields
- Determine the number of items to display on each page (when expecting multiple records)
 - **Note:** The BSD system remembers the Items/Page value chosen for the entire session
- Execute the search query by clicking the search button

Screen Shots (page layout)

Search Sample Inventory (page)

The screenshot shows the 'Search Sample Inventory' page in the Bio Sample Database. The page has a blue header with the database name and navigation links. The search form includes several input fields and dropdown menus for filtering results. A 'Search' button is prominently displayed. Annotations with dashed boxes point to the 'Search' button and a section of additional filters below the main search area.

To list the query results

Additional Filters available for build specific lists (also see Query builder)

Search Sample Inventory (features)

- The system searches the BSD database for matching results

- Search parameters are used to filter the the query results
- Search criteria (most specific)
 - Src/Interview #: limit the search to the interview number supplied by the source who provided the samples, such as TIP Interview number
 - Tag #: limit the search to the sample fish tag number, a unique tag is assigned to each TIP sample
 - **Note: when no results are found using the Source Interview number or the Tag number, the interview samples may not have been received?**
- Additional search criteria (less specific)
 - Species: limit search results to chosen species
 - State: limit search results to chosen state
 - Lab (Location): limit search results to chosen location including "Unknown" location which lists missing samples
 - Collection Period: limit search results to interview dates within a species data range
 - Length: limit search results to fish which fall between the specified maximum and minimum lengths in millimeters
 - **Note: the fork length measurement is compared first, but if fork length is unavailable the total length is used**
 - Collection #: limit the search to interview species matching the manually assigned Panama City Collection number
 - **Note: values can be a list of collection numbers or the text "not null"**
 - **Examples:**
 - 123 - will return interview/collections with the number 123
 - 1,2,3 - will return interview/collections with the numbers 1, 2, or 3
 - "not null" - will return interview/collections where the collection number exists
 - Collector: limit the search to the TIP port agent who perform the interview collection
 - County: limit the search to the landed county of the sample
 - Mode: limit the search to interviews from fishing trips of the specific mode, such as commercial
 - Gear: limit the search to interviews using the specific gear group
- Note: the additional search parameters are visible made clicking on the "More Filters..." link to the right of the page

Search Results (page)

Search Sample Inventory

Species: ALMACO JACK State: ALL Collection Period: From: To: Length (mm): Min: Max: Items/Page: 20

Src/Interview #: Tag #: Lab: BEAUFORT

Collection #: Collector: ALEFORT County: ALL Mode: Gear: ALL

Search

Collection with comments

Date	Coll#	Source	Interview#	State	County	Collector	Species	Otoliths	Gonads	Spines	Scales	Mode	Gear	Comments	Action
06/11/2010	123	TIP	308748	LA	LAFOURCHE	ALEFORT	ALMACO JACK	5	0	0	0	1	HL		Open
05/17/2010		TIP	308646	LA	LAFOURCHE	ALEFORT	ALMACO JACK	1	0	0	0	1	HL		Open
04/29/2010		TIP	304436	LA	LAFOURCHE	ALEFORT	ALMACO JACK	1	0	0	0	1	HL		Open
04/29/2010		TIP	304432	LA	LAFOURCHE	ALEFORT	ALMACO JACK	1	0	0	0	1	HL		Open
09/25/2009		TIP	296714	LA	LAFOURCHE	ALEFORT	ALMACO JACK	7	0	0	0	1	HL		Open
03/09/2009		TIP	290982	LA	LAFOURCHE	ALEFORT	ALMACO JACK	4	0	0	0	1	HL		Open

Total Interviews: 6

Total Parts (all pages): 19 0 0 0

Export: CSV PDF

Total collections (interview/species) found.

Sample totals for all collections in the search results

Export results to desktop computer

Only specified values are included in the search. Here we use three search parameters (Species, Collector, and Lab) for all other parameters the search results includes ANY/ALL values (i.e. any interview number).

To open the Interview in the Receive Inventory page

Search Results (features)

- Search results are filtered by the parameters specified by the users
 - Note: Search parameters left blank or "ALL" are not included in the filter. Meaning ANY/ALL values are allowed
- The total number of collections (interviews by species) found is listed at the bottom of the page.
 - There may be several pages of results
- The user can specify the number of items (collections in this case) to display on each page of the results
- If a collection has comments the comment icon is filled in
- Total values for otoliths, gonads, spines, and scales are summed at the bottom of the page for all collections in the search results
- Search results may be exported to a desktop Comma Separated Values (CSV) file
- Search results include
 - Date: Interview date
 - Coll#: The Panama City collection number
 - Source: the source providing the interview samples (always TIP for BSD version 1.0)
 - Interview #: the source provided interview number (TIP Interview number)
 - State: the landed state of the interview
 - County: the landed county of the interview
 - Collector: the TIP port agent conducting the interview
 - Species: the species of the collection
 - Otoliths: the number of samples of this type received
 - Gonads: the number of samples of this type received
 - Spines: the number of samples of this type received
 - Scales: the number of samples of this type received
 - Mode: the fishing mode type for the interview, such as commercial
 - Gear: the gear group used during the fishing trip
 - Comments: the collection comments entered by lab personnel, if any
 - Action: to open the interview containing the collection in the Receive Inventory page
- The interview containing the collection can be opened by clicking on the "Open" link to the right of the collection

- The inventory will be opened in the Receive Inventory page.

Table of Contents - Sample Definitions

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Introduction

A sample definition is a grouping of fish samples following a specific selection criteria. A sample definition is built by querying the available fish samples in inventory based on information pertaining to the fishing trip which landed the sample. Information such as date of fishing trip, species, gear, etc.

The fish samples included in a sample definition are pulled from inventory and undergo biological analysis (i.e.age reading).

Sample Definitions (A Group of Samples)

The Sample Definition pages of the system are where users manage the groups of samples to perform biological (i.e. age reading) analysis. A sample Definition is a group of samples based on one or more subsample query filters. Using various subsample filter criteria users can easily define a Sample Definition with the number of samples, species, gear, etc., needed.

The primary actions for managing Sample Definitions include:

- New Sample Definition - creating a new Sample Definition
- Search Sample Definition - search through existing Sample Definitions
- Edit Sample Definition - edit/modify an existing Sample Definition
- View Sample Definition - preview a list of samples associated to a Sample Definition and export the list to a spreadsheet (i.e. inventory pick list)

Building a Sample Definition is the first step in the biological analysis (i.e. age reading) process. After a Sample Definition is created, the samples associated to the group are pulled from inventory and prepared for reading. The general steps in the process include:

1. Define a Sample Definition
2. Pull samples from inventory (pick list)
3. Read samples based on age, histological, or reproductive data
4. Proof reading data (validate and confirm accuracy)
5. Assign final reading
6. Export results for reporting

Create a New Sample Definition (Group of Samples for Reading)

Menu Navigation: Menu → Sample Definitions → New Sample Definition

Purpose: Create a new Sample Definition

A Sample Definition is created when biological analysis is needed for a particular fishery. The Sample Definition (a group of samples) is built by querying the existing inventory of samples received at the lab, using a set of query filters such as species, date of the fishing trip, gear used to catch the fish, location of landing, etc.

Typical Actions

- Create a new Sample Definition
- Enter one or more subsample filter criteria

Screen Shots (page layout)

New Sample Definition (page)

Bio Sample Database Monday, November 01, 2010
JAY OLLARY
Administrator - PANAMA CITY

Home Manage Inventory Sample Definitions Sample Storage Management Sample Readings Query Builder Maintenance Logout

New Sample Definition

Name: Description:

Species: Subsample By: Individual Fish Collection

Enter a name and description along with:
1) Choose a species for this sample definition
2) Choose if the sample definition is comprised of individual fish or collections (a collection is all the fish for a species from an interview)

New Sample Definition (features)

- Enter a unique name for the Sample Definition
- Enter an optional description
- Choose a species
- Determine if the subsample filter criteria will select individual fish samples or entire collections (all the species for an interview)
 - Samples are received and stored by interview and species. By choosing collection the user is indicating that they want all the species for an interview included in the Sample Definition
- Save the Sample Definition
 - Note: the name and description can be updated by re-clicking the save button however the species and subsample selection can not change
 - Note: after clicking the save button the user is moved to the Edit page

Edit a Sample Definition

1) Menu Navigation: Menu → Sample Definitions → Search Sample Definitions → Action: Edit

2) Menu Navigation: Menu → Sample Definitions → New Sample Definitions → Action: Save

Purpose: Edit an existing (or newly created) Sample Definition

A Sample Definition is created when biological analysis is needed for a particular fishery. The Sample Definition (a group of samples) is built by querying the existing inventory of samples received at the lab, using a set of query filters such as species, date of the fishing trip, gear used to catch the fish, location of landing, etc.

Editing an existing Sample Definition is expected while perfecting the contents of the sample group. In addition, a Sample Definition can easily be increased in size by adding additional subsample filters.

Note: reading analysis work can be lost when a subsample filter is removed from a Sample Definition. Care should be taken when removing a subsample after reading work has begun.

Typical Actions

- Edit Sample Definition
- Add additional subsample filters
- Remove a subsample filter (before reading begins)
- Delete the Sample Definition

Screen Shots (page layout)

Edit Sample Definition (page)

Edit Sample Definition

Name: FINAL READING DEMO Description: Red Snapper

Species: RED SNAPPER,LUTJANUS CAMPECHAN Subsample By: Individual Fish Collection

Sample Filtering Criteria - For each category, when nothing is checked all items are included

Year Period: From: 2010 To: 2010

Source: -- Choose One -- Depth (meters): Min: Max:

Collector: -- Choose One -- Total Length (mm): Min: Max:

Area: -- Choose One -- Fork Length (mm): Min: Max:

County: -- Choose One -- Sex: -- Choose One --

Months: Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
Wave 1 Wave 2 Wave 3 Wave 4 Wave 5 Wave 6

State: AL FL GA LA MS NC SC TX

Mackerel State: AL EF GA LA MS NC NEF NWF SC SEF SF SWF TX VA WF

Mode: Commercial Charter Party Head Boat Private
Tournament Scientific Survey Unknown Observer Onboard

Gear: Cast Net Gill Net Hand Line Long Haul Long Line Vertical Long Line
Pound Net Spear Trap Trawl Unassigned

Sample Type: Otolith Gonad Spine Scale

Samples: 3006 Interview/Collections: 113 Take 0 randomly from Samples Add Subsample

Save Cancel Delete

Add a subsample filter to the Sample Definition

Edit Sample Definition (features)

- Save changes to the name or description
- Cancel changes
- Delete the Sample Definition
- Enter subsample filter criteria
 - Filter values reduce the query results to the criteria chosen
- Add a subsample filter to a Sample Definition

Edit Sample Definition - Add Subsample Filters (page)

Sample Filtering Criteria - For each category, when nothing is checked all items are included

Year Period: From: 2010 To: 2010

Months: Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

Wave 1 Wave 2 Wave 3 Wave 4 Wave 5 Wave 6

Source: -- Choose One -- Depth (meters): Min: Max:

Collector: -- Choose One -- Total Length (mm): Min: Max:

Area: -- Choose One -- Fork Length (mm): Min: Max:

County: -- Choose One -- Sex: -- Choose One --

State: AL FL GA LA

Mackerel: AL EF GA LA

Mode: SC SEF SF SWF

Commercial Charter Part

Tournament Scientific Su

Gear: Cast Net Gill Net H

Pound Net Spear T

Sample Type: Otolith Gonad Spine Scale

Samples: 3006 Interview/Collections: 113

Take: 0 randomly from Samples

1) Choose the filtering criteria
Note: for each filter category (i.e. Months) the default it to include everything. Therefore, when none are checked, the filter is omitted and any/all item is included. Meaning, if you don't choose a month then any/all months are included (allowed) in the subsample. If you choose a month (i.e. Jan) then only the chosen month(s) are included in the subsample.

2) Choose the number of samples to include

3) Add the subsample

4) Review the subsample attributes (remove if incorrect)

Filter Criteria	SUBSAMPLE 1	SUBSAMPLE 2	SUBSAMPLE 3
Remove	Remove	Remove	Remove
Size	10 samples in 1 Interviews	10 samples in 1 Interviews	10 samples in 1 Interviews

Edit Sample Definition - Add Subsample Filters (features)

1. Choose the parameters for the subsample filter such as year period and month
 1. Note: for each filter category (i.e. sample type) the default it to include everything. Therefore, when none are checked, the filter is excluded and any/all item is included. Meaning, if you don't choose a month then any/all months are included (allowed) in the subsample. If you choose a month (i.e. Jan) then only the chosen month(s) are included in the subsample.
2. Choose the number of samples or collections to include in the filter
 1. The available number of samples/collection are displayed at the lower left corner of the filter criteria area
3. Add the subsample to the Sample Definition
 1. Note: once a sample has been included in a Sample Definition it is no longer available for other Sample Definition
4. Review the attributes of the subsample and remove if incorrect

Edit Sample Definition - Compare Subsample Filter attributes (page)

This example shows a sample definition comprised of four subsample filters which can be compared side-by-side.

Filter Criteria	SUBSAMPLE 1 Remove	SUBSAMPLE 2 Remove	SUBSAMPLE 3 Remove	SUBSAMPLE 4 Remove
Size	10 samples in 1 Interviews	10 samples in 3 Interviews	10 samples in 2 Interviews	10 samples in 1 Interviews
Subsample ID	661	724	725	726
Source				
Collector				
County				
Sex				
Year From	2010	2010	2010	2010
Year To	2010	2010	2010	2010
Min Fork Len				
Max Fork Len				
Min Total Len				
Max Total Len				
Min Depth				
Max Depth				
Area				
Gear				
Month	4	5	6	7
Mode				
Sample Type	OTOLITH	OTOLITH	OTOLITH	OTOLITH
State				
Mackerel State				

Edit Sample Definition - Compare Subsample Filter attributes (features)

- Subsample filter parameters are lined up side-by-side for easy comparison
- If a subsample is incorrect, remove it by clicking the "remove" link and re-define it
 - To modify a subsample, remove it and add it again with new filter parameters

Search for Existing Sample Definition Groups

Menu Navigation: Menu → Sample Definitions → Search Sample Definitions

Purpose: Search for existing Sample Definitions

A Sample Definition is created when biological analysis is needed for a particular fishery. The Sample Definition (a group of samples) is built by querying the existing inventory of samples received at the lab, using a set of query filters such as species, date of the fishing trip, gear used to catch the fish, location of landing, etc.

The Sample Definition search is used to navigate to pages that allow users to view the samples in a Sample Definition, or edit an existing Sample Definition

The Search Sample Definition pages have been designed to help users quickly locate a Sample Definition. The pages include several search criteria which can be used in combination to filter the results.

Typical Actions

- Search for existing Sample Definitions

- View samples from a Sample Definition (i.e. to build an inventory pick list)
- Edit an existing Sample Definition (i.e. to increase the Sample Definition by adding additional subsamples)

Screen Shots (page layout)

Search Sample Definition (page)

Bio Sample Database
 Monday, November 01, 2010
 JAY O'LEARY
 Administrator - PANAMA CITY

Home Manage Inventory Sample Definitions Sample Storage Management Sample Readings Query Builder Maintenance Logout

Sample Definitions

Enter search criteria

Keyword: Species: ALL
 Subsample Type: ALL Lab: PANAMA CITY Search Items/Page: 20

Sample Definition	Type	Species	Samples	Read	Proofed	Final Read	Samples	Action
FINAL READING DEMO Red Snapper	Individual	RED SNAPPER,LUTJANUS CAMPECHAN	40	9	9	9	View	Edit

Current reading status/progress for the sample definition
 - Samples: number of samples in the definition
 - Read: number of samples with a reading
 - Proofed: number of samples which have been proofed
 - Final Reading: number of samples with a final reading/reader

Choose an Action
 1) Edit the sample definition
 2) View a list of samples for a sample definition

Search Sample Definition (features)

- Enter search criteria
- Choose an action:
 - Edit the Sample Definition
 - View a list of samples for a Sample Definition
- View current reading status/progress for the Sample Definition
 - Samples: number of samples in the definition
 - Read: number of samples with a reading
 - Proofed: number of samples which have been proofed
 - Final Reading: number of samples with a final reading/reader

View Individual Samples in a Sample Definition (page)

Individual Samples in Definition

Definition Name: **FINAL READING DEMO**
Description: **Red Snapper**
Size: **40**

Collection#	Interview	Date	State	Collector	Species	Tag#
300260		04/22/2010	FL	D.FABLE	RED SNAPPER,LUTJANUS CAMPECHAN	20100290681
300260		04/22/2010	FL	D.FABLE	RED SNAPPER,LUTJANUS CAMPECHAN	20100290666
300260		04/22/2010	FL	D.FABLE	RED SNAPPER,LUTJANUS CAMPECHAN	20100290675
300260		04/22/2010	FL	D.FABLE	RED SNAPPER,LUTJANUS CAMPECHAN	20100290651
300260		04/22/2010	FL	D.FABLE	RED SNAPPER,LUTJANUS CAMPECHAN	20100290646
300260		04/22/2010	FL	D.FABLE	RED SNAPPER,LUTJANUS CAMPECHAN	20100290680
300260		04/22/2010	FL	D.FABLE	RED SNAPPER,LUTJANUS CAMPECHAN	20100290662
300260		04/22/2010	FL	D.FABLE	RED SNAPPER,LUTJANUS CAMPECHAN	20100290656
300260		04/22/2010	FL	D.FABLE	RED SNAPPER,LUTJANUS CAMPECHAN	20100290649
300260		04/22/2010	FL	D.FABLE	RED SNAPPER,LUTJANUS CAMPECHAN	20100290692

Total items: 40

1 2 3 4 > Last

Export: [CSV](#) [PDF](#)

Preview sample definition list

Export/Download list to spreadsheet

View Individual Samples in a Sample Definition (features)

- Preview Sample Definition list
 - Note: this is a simple preview to view the sample data prior to exporting to spreadsheet
 - Comma Separated Values (CSV)

Table of Contents - Managing Sample Storage

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Introduction

This document outlines how to use the pages for managing sample storage with the Biological Sample Database (BSD) system. When biological samples are shipped to the labs, they are received as inventory. The inventory is stored in large bins or buckets awaiting the day they are included in a sample definition data-set.

When a sample is included in a sample definition data-set, the sample is pulled from inventory and prepared for reading. Although the managing of sample storage can be used to track the storage of any samples, a good example is when an otoliths is sectioned.

A sectioned otolith is glued to a microscope slide and stored in a box. A slide box typically holds one hundred slides. The BSD sample storage pages were designed to accommodate box and slide storage, which is the most used form of sample storage at the labs.

In its basic form, the sample storage is a tracking mechanism which allows users to quickly assign storage locations to samples and re-retrieve the information during reading.

The Southeast Fisheries Science Center (SEFSC), the Panama City Florida lab, and the Beaufort North Carolina lab worked together to design and develop the sample storage pages.

Managing Sample Storage

The Manage Sample Storage pages of the system are where users manage the storage of samples which are prepared for reading. Most often the samples are section otoliths being stored in microscope slide boxes. The primary actions for managing storage include:

- Search for Samples - list the samples associated with a sample definition data-set
 - List the samples grouped by interview
 - List the sample for the entire sample definition data-set
- Assign Storage - assign the storage number (box number) and the slide number (if applicable)

Note: the storage location can also be assigned when entering reading data.

Manage Storage - List Sample Storage by Interview

Menu Navigation: Menu → Manage Sample Storage → Search Sample Storage

Purpose: Search Sample Storage - List the samples of a Sample Definition Data-set. List the samples grouped by interview or for the entire data-set.

Samples which have been assigned to a Sample Definition Data-set are listed either grouped by interview (collection) or for the entire data-set. When samples are listed by interview the fields include the number of samples in the interview, how many of the samples have been stored, along with the storage number. Each interview/collection group can be listed individually and the storage information edited.

When samples are listed by Sample Definition the user is on an edit page for all interview samples included in the sample definition. From this page users can assign the sample to storage locations.

Note: only samples which are part of a Sample Definition Data-set can be stored with the Manage Sample Storage pages

Typical Actions

- Choose a Sample Definition - choose a sample definition for a list
- Enter Optional Filter Criteria - to reduce the search results
- Edit an interview's (collection's) Sample Storage - list the samples associated to an interview and assign the storage location

Screen Shots (page layout)

List Storage by Interview (page)

Sample Storage Management

Choose a sample type to be stored and a sample definition

Storage can be managed by Interview or the entire sample definition

How to read the results: Interview 300260 contains 10 samples. 9 of the samples are stored in storage box 1. 1 of the samples is stored in storage box 12345

Open the interview and assign the samples to a storage location

Sample Type: OTOLITH Sample Definition: FINAL READING DEMO Enter storage assignments by Interview

Scope: ALL Ref.# / Id: Search

Items/Page: 20

Source Code	Collection#	Interview#	Species	Samples	Samples Stored	Storage#	Action
TIP		300260	RED SNAPPER,LUTJANUS CAMPECHAN	10	9	1	Edit
TIP		300260	RED SNAPPER,LUTJANUS CAMPECHAN	10	1	12345	Edit
			RED SNAPPER,LUTJANUS CAMPECHAN	5	0		Edit
			RED SNAPPER,LUTJANUS CAMPECHAN	2	0		Edit
			RED SNAPPER,LUTJANUS CAMPECHAN	3	0		Edit
			RED SNAPPER,LUTJANUS CAMPECHAN	9	0		Edit
			RED SNAPPER,LUTJANUS CAMPECHAN	1	0		Edit
			RED SNAPPER,LUTJANUS CAMPECHAN	10	0		Edit

Filter the search results using the Scope and Ref#/Id input fields (optional).
Search for interviews using:
1) An interview number
2) Containing a collection number
3) Containing a storage number
4) Containing a fish tag number

Export: [CSV](#) [PDF](#)

How to read the results from the image above: Interview 300260 contains 10 samples. 9 of the samples are storage in storage box 1. 1 of the samples is stored in storage box 12345.

List Sample Storage by Interview (features)

- Choose the sample type such as otolith (default)
- Choose a Sample Definition from a list
- Storage can be managed by interview of the entire sample definition data-set - check the box to view grouped by interview
- Filter the search results using the Scope and Ref#/ Id input fields (optional)
 - The optional filters will limit the list to sample from interviews which contain:
 - the specified interview number
 - the specified collection number
 - the specified storage number
 - the specified fish tag number
- Open/edit an interview and assign the samples to a storage location

Edit Sample Storage for an Interview (page)

This example is shown after clicking -> Action: Edit on Manage Sample Storage for interview 300260

Sample Storage Management

Sample Type: OTOLITH | Sample Definition: FINAL READING DEMO | Enter storage assignments by Interview | Storage can be managed by interview or the entire sample definition

Scope: ALL | Ref.# / Id: | Search

Items/Page: 20

Storage#	Slide#	Coll#	Tag#	Interview#	Interview Date	Comments	Not Stored Reason	Is Missing
1	1		20100290646	300260	04/22/2010		Choose One	<input type="checkbox"/>
1	2		20100290649	300260	04/22/2010		Choose One	<input type="checkbox"/>
1	3		20100290651	300260	04/22/2010		Choose One	<input type="checkbox"/>
1	4		20100290656	300260	04/22/2010		Choose One	<input type="checkbox"/>
1	5		20100290662	300260	04/22/2010		Choose One	<input type="checkbox"/>
1	6		20100290666	300260	04/22/2010		Choose One	<input type="checkbox"/>
1	7		20100290675	300260	04/22/2010		Choose One	<input type="checkbox"/>
1	8		20100290680	300260	04/22/2010		Choose One	<input type="checkbox"/>
1	9		20100290681	300260	04/22/2010		Choose One	<input type="checkbox"/>
12345	10		20100290692	300260	04/22/2010		Choose One	<input type="checkbox"/>

Total items: 10

Export: [CSV](#) [PDF](#)

Save | Export/Download list to spreadsheet

How to read the results:
Interview 300260 contains 10 samples.
9 of the samples are stored in storage box 1 (Slide 1-9). 1 of the samples is stored in storage box 12345 (slide 10)

How to read the results from the image above: Interview 300260 contains 10 samples. 9 of the samples are storage in storage box 1. 1 of the samples is stored in storage box 12345.

Edit Sample Storage for an Interview (features)

- Choose the sample type such as otolith (default)
- Choose a Sample Definition from a list
- Storage can be managed by interview of the entire sample definition data-set - un-check the box to view all
- Filter the search results using the Scope and Ref#/ Id input fields (optional)
 - The optional filters will limit the list to interviews which contain:
 - the specified interview number
 - the specified collection number
 - the specified storage number
 - the specified fish tag number
- Assign the samples to a storage location
- Add comments, Not Read Reason, of Missing if necessary

Manage Storage - List Sample Storage by Sample Definition

Menu Navigation: Menu → Manage Sample Storage → Search Sample Storage

Purpose: Search Sample Storage - List the samples of a Sample Definition Data-set. List the samples grouped by interview or for the entire data-set.

Samples which have been assigned to a Sample Definition Data-set are listed either grouped by interview (collection) or for the entire data-set. When samples are listed by Sample Definition the user is on an edit page for all interview samples included in the sample definition. From this page users can assign the sample to storage locations.

Note: only samples which are part of a Sample Definition Data-set can be stored with the Manage Sample Storage pages

Typical Actions

- Choose a Sample Definition - choose a sample definition for a list
- Enter Optional Filter Criteria - to reduce the search results
- Assign the storage location

Screen Shots (page layout)

List Storage by Sample Definition (page)

Sample Storage Management

Sample Type: OTOLITH | Sample Definition: FINAL READING DEMO | Enter storage assignments by Interview

Scope: ALL | Ref.# / Id: | Search | Items/Page: 20

Storage#	Slide#	Coll#	Tag#	Interview#	Interview Date	Comments	Not Stored Reason	Is Missing
1	1	20100290646		300260	04/22/2010		Choose One	<input type="checkbox"/>
1	2	20100290649		300260	04/22/2010		Choose One	<input type="checkbox"/>
1	3	20100290651		300260	04/22/2010		Choose One	<input type="checkbox"/>
1	4	20100290656		300260	04/22/2010		Choose One	<input type="checkbox"/>
1	5	20100290662		300260	04/22/2010		Choose One	<input type="checkbox"/>
1	6	20100290666		300260	04/22/2010		Choose One	<input type="checkbox"/>
1	7	20100290675		300260	04/22/2010		Choose One	<input type="checkbox"/>
1	8	20100290680		300260	04/22/2010		Choose One	<input type="checkbox"/>
1	9	20100290681		300260	04/22/2010		Choose One	<input type="checkbox"/>
12345	10	20100290692		300260	04/22/2010		Choose One	<input type="checkbox"/>
		20100222896	309033		05/18/2010		Choose One	<input type="checkbox"/>
		20100222897	308033		05/18/2010		Choose One	<input type="checkbox"/>
					8/2010		Choose One	<input type="checkbox"/>
					8/2010		Choose One	<input type="checkbox"/>
					8/2010		Choose One	<input type="checkbox"/>
					9/2010		Choose One	<input type="checkbox"/>
					9/2010		Choose One	<input type="checkbox"/>
		20100331043	308312		05/22/2010		Choose One	<input type="checkbox"/>
		20100331056	308312		05/22/2010		Choose One	<input type="checkbox"/>
		20100331059	308312		05/22/2010		Choose One	<input type="checkbox"/>

Total items: 40 | 1 2 > Last

Export: CSV PDF

Save | Export/Download list to spreadsheet

How to read the results from the image above: Interview 300260 contains 10 samples. 9 of the samples are storage in storage box 1. 1 of the samples is stored in storage box 12345. Other samples are listed which have not been assigned a storage location.

List Storage by Sample Definition (features)

- Choose the sample type such as otolith (default)
- Choose a Sample Definition from a list
- Storage can be managed by interview of the entire sample definition data-set - un-check the box to view all
- Filter the search results using the Scope and Ref# Id input fields (optional)
 - The optional filters will limit the list to interviews which contain:
 - the specified interview number
 - the specified collection number
 - the specified storage number
 - the specified fish tag number
- Assign the samples to a storage location
- Add comments, Not Read Reason, of Missing if necessary

Table of Contents - Sample Reading

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Introduction

This document outlines how to use the pages for managing biological sample readings with the Biological Sample Database (BSD) system. When a sample is included in a Sample Definition data-set, the sample is pulled from inventory and prepared for reading.

There are five types of sample reading supported by BSD: Age and Growth readings for otolith, scales, and spines as well as Histological and Reproductive readings for gonads. The pages (user interface) change to display the appropriate data input fields based on which type of reading is being entered.

Sample readings are recorded by sample definition and reader instance. Meaning, the same reader (person) can have multiple readings for a sample. The first set of sample readings should be recorded with reading instance equal to "1- First". Additional readings should be recorded under "2 - Second", "3 - Third", and so on. **Note: the system does not enforce that a first reading instance exists prior to a second reading instance.** Data entry for a reading instance is decided by the user.

When all of the required fields have been supplied a sample reading can be declared "Proofed". This is done by clicking a check-box. Often this is done by someone other than the person who performed the initial data entry or reading. The system records detailed information about users associated to reading data such as: the user who supplied the reading, the user who performed the data entry into BSD, and the user who proofed the data (which is the person logged in when the data is proofed).

After all the reading data has been entered and proofed (or at any point during the reading process) the Generate Final Reading can be performed. This process chooses the most recent (latest) instance of a reader's readings based on a priority assigned by the user. The process can be re-run as often as necessary, however only one reading per sample can have a Final Reading.

The final reading values for a sample definition can be view and exported as a spreadsheet.

The Southeast Fisheries Science Center (SEFSC), the Panama City Florida lab, and the Beaufort North Carolina lab worked together to design and develop the sample reading pages.

Sample Readings

The Sample Reading pages of the system are where users enter and proof readings, process final reading assignment, and view final reading data. Sample storage assignment can also be entered while entering reading data. The primary actions for managing/entering readings include:

- List samples and reading data (input fields)
 - Enter reading values
 - Proof reading
 - Generate final reading
 - View final reading values
-

Sample Readings - Enter/Proof Reading

Menu Navigation: Menu → Sample Reading → Enter/Proof Reading

Purpose: Enter/Proof Readings - Locate BSD sample to enter and/or proof reading values

The Enter/Proof Reading pages will list the samples which have been assigned to a Sample Definition Data-set. The appropriate data input fields (i.e. age, reproductive, histological) will be listed with the samples based on the type of reading, the reader, and the reading instance (a reader can enter multiple readings for the same samples). In addition, the sample storage location can be updated if necessary.

Typical Actions

- Enter/edit sample readings
- Proof sample readings
- Assign storage location (if not already present)

Screen Shots (page layout)

Enter/Proof Reading (page)

Choose a reader and reading instance Choose a reading type

Enter Readings

Reader: BEVERLY BARNETT Reading Instance: 1 - FIRST Reading Type: AGE & GROWTH: OTOLITH

Sample Definition: FINAL READING DEMO Scope: ALL Ref.# / Id: Search

Items/Page: 10

Choose a Sample Definition Optional search filters

RED SNAPPER, LUTJANUS CAMPECHAN

Storage#	Slide#	Coll#	Tag#	Interview	Interview Date	Ring Count	Edge Type	Readability	Age	Comments	Unread	Proofed
1	1		20100290646	300260	04/22/2010	2	ROUNDED	AVERAGE	2		- Choose -	<input checked="" type="checkbox"/>
1	2		20100290649	300260	04/22/2010	2	ROUNDED	AVERAGE	2		- Choose -	<input checked="" type="checkbox"/>
1	3		20100290651	300260	04/22/2010	2	ROUNDED	AVERAGE	2		- Choose -	<input checked="" type="checkbox"/>
1	4		20100290656	300260	04/22/2010	2	ROUNDED	AVERAGE	2		- Choose -	<input checked="" type="checkbox"/>
1	5		20100290662	300260	04/22/2010	2	ROUNDED	AVERAGE	2		- Choose -	<input checked="" type="checkbox"/>
1	6		20100290666	300260	04/22/2010		- Choose -	- Choose -			- Choose -	<input type="checkbox"/>
1	7		20100290668	300260	04/22/2010		- Choose -	- Choose -			- Choose -	<input type="checkbox"/>
1	8		20100290669	300260	04/22/2010		- Choose -	- Choose -			- Choose -	<input type="checkbox"/>
1	9		20100290670	300260	04/22/2010		- Choose -	- Choose -			- Choose -	<input type="checkbox"/>
12345	10		20100290692	300260	04/22/2010		- Choose -	- Choose -			BROKEN	<input type="checkbox"/>

Total items: 40

Storage Location Sample Identification Reading values Optional Notes Proofed?

Export: CSV PDF

Export readings to spreadsheet

Reading Date: 10/06/2010 Save

How to read the results from the image above: There are five samples which have been proofed with Beverly's first instance of age and growth readings. One sample is unreadable.

Enter/Proof Readings (features)

- Choose a reader (user)
- Choose a reading instance - such as First (default), however a sample can have multiple readings for the same reader/user)
- Choose a reading type - Age and Growth readings for otolith, scales, and spines, Histological and Reproductive readings for gonads
- Choose a Sample Definition
- Filter the search results using the Scope and Ref#/ Id input fields (optional)
 - The optional filters will limit the list to sample from interviews which contain:
 - the specified interview number
 - the specified collection number
 - the specified storage number
 - the specified fish tag number
- Enter storage location
 - Storage# can be auto filled by clicking the copy icon - fill down with same value
 - Slide# can be auto filled by clicking the copy icon - fill down with increments of 1
- The unread reason list can be maintained in the Maintain LOV pages
- Set reading date (default is current date)
 - **Note: a reading is not required for every sample**
- Proof readings by clicking the check-box

- **Note:** all required values are necessary to proof readings - cannot proof incomplete data

Note: reading values can be exported to a desktop spreadsheet.

Sample Readings - Generate Final Reading

Menu Navigation: Menu → Sample Reading → Generate Final Reading

Purpose: Choose final reading values for a Sample Definition based on reader priority

When all samples of a sample definition data-set have been assigned reading values, the system is ready to assign the final reading. To determine the assignment of final readings when samples have readings from multiple readers, or multiple readings from the same reader, the system uses a priority selection and instance calculation. All readers who contributed reading values to a sample definition are assigned a priority. Based on the priority the final reading values are chosen. If a reader has multiple instances of readings for a sample, the values from the greatest instance (most recent) are chosen.

Note: only proofed readings are eligible for final readings

Note: the final reading process can be re-run as often as necessary

Typical Actions

- Choose a Sample Definition
- Review reading progress (summary and detail)
- Assign reader priority
- Generate final reading
- Review final reading values

Screen Shots (page layout)

Generate Final Reading (page)

Generate Final Reading

Choose a Sample Definition

Sample Definition: FINAL READING DEMO

Summary

Total Samples:	40
Total (distinct) Readings:	9
Total (distinct) Proofed:	9
Total Unreadable:	1
Total Final Reading:	9

Sample Definition Summary Calculations:

- Total Samples: number of samples in the sample definition
- Total Readings: number of samples with readings
- Total Proofed: number of samples with proofed readings
- Total Unreadable: number of samples which are unreadable
- Total final Reading: number of samples with a final reading

Detail

Reader	Reading Instance	Readings	Proofed	Final Reading
BEVERLY BARNETT	1	5	5	5
JAY O'LEARY	1	9	9	4

Total Items: 2

Assign Priority

Reader	Priority
BEVERLY BARNETT	-- Choose One --
JAY O'LEARY	-- Choose One --

Total Items: 2

Assign reader priority

Generate final reading values (replaces prior data)

Generate

Detail reading, proofing, and final reading counts by reader and instance

How to read the results from the image above: Summary: The Final Reading Demo sample definition contains 40 samples. 9 of the sample have reading values (the other 30 were left blank, 1 was unreadable). 9 of the sample have proofed readings. 9 of the samples have final readings. Detail: Beverly entered one set of reading values (one instance) for 5 samples. All 5 were proofed, and all 5 were chosen for final readings. Jay entered one set of reading values (one instance) for 9 samples. All 9 were proofed, and 4 were chosen as final readings.

Generate Final Reading (features)

- Choose a Sample Definition
- Review reading progress/totals
 - Sample Definition Summary Calculations:
 - Total Samples: number of samples in the sample definition
 - Total Readings: number of samples with readings
 - Total Proofed: number of samples with proofed readings
 - Total Unreadable: number of samples which are unreadable
 - Total final Reading: number of samples with a final reading
 - Detail reading, proofing, and final reading counts by reader and instance
- Assign reader priority
- Generate final reading values (replaces prior data)

Sample Readings - View Final Reading

Menu Navigation: Menu → Sample Reading → View Final Reading

Table of Contents - Query Builder

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Introduction

The Query Builder allows users to access fourteen (number at the time of this writing) different pre-defined report formats. Across the BSD system, just about every query that lists information on the screen has an option to "Export to CSV" displayed in the lower right corner of the page. The Query Builder provides an additional source of predefined report data (canned reports). In addition, each of the reports in the Query Builder can make use of extensive filtering capabilities similar to those found on the Sample Definition pages.

Query Builder

The Query Builder allows users to access predefined report formats, preview the results, and export the data to a spreadsheet. The user chooses the query they want to run from a drop down list. The query data is segmented by location so the queries can focus on data from a specific lab location.

The predefined list of report queries include:

- Log by species
- Mode and Gear by Month by species
- Sample count by mode, gear and location per species
- Sample count by gear, mode, source and state
- Sample count by species, sample type and location
- Count of samples by type
- Count by sample type for a species by collector
- Count by sample type for a species by collector and interview
- Count by sample type for the source by month
- Count by sample type for the source by state
- Count of samples by species
- Count of sample type by state
- Count of samples by species and sample type for month, state, mode and gear
- Count of samples by species and sample type for state, mode and gear

Query Builder - Report Generator

Menu Navigation: Menu → Query Builder → Report Generator

Purpose: Query sample data through online reports

The Query Builder allows users to access predefined report formats, preview the results, and export the data to a spreadsheet.

Typical Actions

- Choose a report type - from the predefined list of queries
- Choose the sample location - default is the user's location
- Add options report filter criteria
- Query data and preview the results
- Export report data to desktop spreadsheet

Screen Shots (page layout)

Query Builder - Report Generator (page)

Choose one of the preexisting report queries

Defaults to the user's location

Query Builder

Report Type: -- Choose One --

Location: PANAMA CITY

Query Data

Items/Page: 20

Report Filtering Criteria - For each category, when nothing is checked all items are included

Species: ALL SPECIES

Year Period: From: 2010 To: 2010

Source: -- Choose One --

Depth (meters): Min: Max:

Collector: -- Choose One --

Area: -- Choose One --

County: -- Choose One --

Sex: -- Choose One --

Months: Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
Wave 1 Wave 2 Wave 3 Wave 4 Wave 5 Wave 6

State: AL FL GA LA MS NC SC TX

Mackerel State: AL EF GA LA MS NC NEF NWF
 SC SEF SF SWF TX VA WF

Mode: Commercial Charter Party Head Boat Private
 Tournament Scientific Survey Unknown Observer Onboard

Gear: Cast Net Gill Net Hand Line Long Haul Long Line Vertical Long Line
 Pound Net Spear Trap Trawl Unassigned

Sample Type: Otolith Gonad Spine Scale

Use filter criteria to limit the content of the report
Note: for each filter category (i.e. Months) the default is to include everything. Therefore, when none are checked, the filter is omitted and any/all item is included. Meaning, if you don't choose a month then any/all months are included (allowed) in the subsample. If you choose a month (i.e. Jan) then only the chosen month(s) are included in the subsample.

Query Builder - Report Generator (features)

- Choose one of the preexisting report queries
- Location defaults to the user's location
- Add optional filter criteria
- Execute query - click "Query Data"

Note: Use filter criteria to limit the content of the report. For each filter category (i.e. Months) the default is to include everything. Therefore, when none are checked, the filter is omitted and any/all item is included. Meaning, if you don't choose a month then any/all months are included (allowed) in the subsample. If you choose a month (i.e. Jan) then only the chosen month(s) are included in the subsample.

Query Builder - Preview Results (page)

The screenshot shows the Query Builder interface with the following details:

- Report Type:** LOG BY SPECIES
- Location:** PANAMA CITY
- Species:** ALMACO JACK
- Year Period:** From: 2010 To: 2010
- Source:** -- Choose One --
- Depth (meters):** Min: Max:
- Collector:** -- Choose One --
- Total Length (mm):** Min: Max:
- Area:** -- Choose One --
- Fork Length (mm):** Min: Max:
- County:** -- Choose One --
- Sex:** -- Choose One --
- Report Filtering Criteria:** For each category, when nothing is checked all items are included.
 - Months:** Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec (Waves 1-6)
 - State:** AL, FL, GA, LA, MS, NC, SC, TX
 - Mackerel State:** AL, EF, GA, LA, MS, NC, NEF, NWF, SC, SEF, SF, SWF, TX, VA, WF
 - Mode:** Commercial, Charter Party, Head Boat, Private, Tournament, Scientific Survey, Unknown, Observer Onboard
 - Gear:** Cast Net, Gill Net, Hand Line, Long Haul, Long Line, Vertical Long Line, Pound Net, Spear, Trap, Trawl, Unassigned
 - Sample Type:** Otolith, Gonad, Spine, Scale

Preview Results Table:

Species: Common Name	Year	PC Coll#	Date	Source	Source#	State	Location	Collector	# of Otoliths	# of Gonads	# of Scales	# of Spines	Mode	Gear	Comments
ALMACO JACK	2010		03/08/2010	TIP	297730	FL	MONROE	L.SCHOTMA	1				CM	HL	
			03/15/2010	TIP	297830	LA	LAFOURCHE	A.LEFORT	6				CM	HL	
			03/22/2010	TIP	297850	FL	MONROE	L.SCHOTMA	1				CM	HL	
			03/27/2010	TIP	297941	LA	LAFOURCHE	A.LEFORT	1				CM	HL	
			04/29/2010	TIP	304435	LA	LAFOURCHE	A.LEFORT	17				CM	HL	
			04/30/2010	TIP	308014	LA	LAFOURCHE	A.LEFORT	10				CM	HL	
			05/21/2010	TIP	308647	LA	LAFOURCHE	A.LEFORT	7				CM	HL	

Total items: 7

Buttons: [Preview results](#), [Export to spreadsheet](#), [Export: CSV](#), [PDF](#)

Query Builder - Preview Results (features)

- The first few rows of the query (based on user preference) is displayed at the bottom of the page
- The preview allows user to "do a quick confirmation" of the results prior to exporting to a spreadsheet
- Export data (report results) to CSV (comma separated values) to be opened in a desktop spreadsheet program

Query Builder - Example Reports

The following is a list of example reports from the BSD Query Builder interface. The predefined reports will include samples which match the user's filter criteria. For these examples we used test data for Panama City, 2010, Almaco Jack

Log by species

This report shows the species name, year, collection number, source, interview number, state, location, collector, count by sample type, mode and gear information of samples received by species and year.

Species: Common Name	Year	PC Coll#	Date	Source	Source#	State	Location	Collector	# of Otoliths	# of Gonads	# of Scales	# of Spines	Mode	Gear	Comments
ALMACO JACK	2010	123	06/28/2010	TIP	308973	LA	LAFOURCHE	A.LEFORT	5				CM	HL	
		124	06/11/2010	TIP	308748	LA	LAFOURCHE	A.LEFORT	1				CM	HL	TEST 2
		150	04/29/2010	TIP	304435	LA	LAFOURCHE	A.LEFORT	17				CM	HL	
		151	05/21/2010	TIP	308647	LA	LAFOURCHE	A.LEFORT	7				CM	HL	
			03/08/2010	TIP	297730	FL	MONROE	L.SCHOTMA	1				CM	HL	
			03/15/2010	TIP	297830	LA	LAFOURCHE	A.LEFORT	6				CM	HL	
			03/22/2010	TIP	297850	FL	MONROE	L.SCHOTMA	1				CM	HL	
			03/27/2010	TIP	297941	LA	LAFOURCHE	A.LEFORT	1				CM	HL	
			04/30/2010	TIP	308014	LA	LAFOURCHE	A.LEFORT	10				CM	HL	

Total items: 9

Export: [CSV](#) [PDF](#)

Mode and Gear by Month

This report shows the counts of samples by gear used for every fishing mode in the month of the year by sample type for each species.

Species: Common Name	Sample Type	Year	Month	Month cnt	Mode	Mode cnt	Gear	Gear cnt
ALMACO JACK	OTOLITH	2010	03	9	CM	9	HL	9
			04	27	CM	27	HL	27
			05	7	CM	7	HL	7
			06	6	CM	6	HL	6

Total items: 4

Export: [CSV](#) [PDF](#)

Mode and Gear by Species

This report shows the percentage and number of samples by gear used and fishing mode by species given the filter criteria.

Species: Common Name	Mode	Gear	Total number of samples	%
ALMACO JACK	CM	HL	49	100 %

Export: [CSV](#) [PDF](#)

Mode and Gear by State

This report shows the totals by sample type, gear, fishing mode, source and state by species.

Species: Common Name	State	Source	Mode	Mode cnt	Gear	# of Otoliths	# of Gonads	# of Scales	# of Spines
ALMACO JACK	FL	TIP	CM	2	HL	2			
	LA	TIP	CM	47	HL	47			

Total items: 2

Export: [CSV](#) [PDF](#)

Number of Samples by Species

Total of samples by sample type and species.

Species: Common Name	# of Otoliths	# of Gonads	# of Scales	# of Spines
ALMACO JACK	49			

Export: [CSV](#) [PDF](#)

Port Agent Collections

This report shows the total of samples by sample type taken by the port agent and the percentage that each species count represents in the total taken.

Agent	Species: Common Name	# of Otoliths	# of Gonads	# of Scales	# of Spines	Otoliths %	Total Otoliths
A.LEFORT	ALMACO JACK	47				100 %	47
L.SCHOTMA	ALMACO JACK	2				100 %	2

Total items: 2

Export: [CSV](#) [PDF](#)

Sampler Report

This reports shows the count of samples grouped by species and the percentage each agent has taken.

Species: Common Name	Total Otoliths	Collector	# of Otoliths	# of Gonads	# of Scales	# of Spines
ALMACO JACK	49	A.LEFORT	47			95.91%
		LSCHOTMA	2			4.08%

Total items: 2

Export: [CSV](#) [PDF](#)

Table of Contents - Maintenance: Lists and Users

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Introduction

The Maintenance pages of the BSD system allow users to maintain the various "pick lists" (List Of Values or LOV) used throughout the system as well as maintain BSD user information. The first list displayed is the master List which shows the twenty eight lists of the system. The BSD system uses built in validation and work-flow to assist users when maintaining lists.

Through the Maintain Users pages, new BSD users are added to the system or information on existing users can be maintained. The user profile information includes the default location for the user and whether or not the user is a reader of biological samples.

Maintenance: Maintain LOVs

The Maintenance pages of the BSD system allow users to maintain the various "pick lists" used throughout the system as well as maintain BSD user information. Using the Maintain LOV (List Of Values) pages users can edit items from twenty eight different lists. The first list displayed is the LOV List which is a master list. Each item in the LOV List is a list in itself. From the LOV List users choose which list they want to maintain, such as Area List. The LOV List can also be maintained to update the list names and descriptions to values familiar to the users of the system.

The BSD system uses built in validation and work-flow to assist users when maintaining lists. For instance, if a list item is being used by one or more sample interviews of the BSD database only the name and description can be modified. The user is not able to modify the code value or delete the item. Only unused items can be removed (deleted) from the database.

Note: when modifying a list item name or description it is important that the new name or description continue to have the same meaning otherwise the historic data loses value.

Maintenance - Master List

Menu Navigation: Menu → Maintenance → Maintain LOVs

Purpose: View all of the lists used throughout the BSD system

The first list displayed when viewing the Maintain LOVs is the LOV Master List. Each item in the LOV Master List is a list in itself. From the LOV List users choose which list they want to maintain, such as Area List. The LOV List can also be maintained to update the list names and descriptions to values familiar to the users of the system. At the time of this writing it was called LOV_LIST.

Typical Actions

- Choose a list to view/maintain

Screen Shots (page layout)

Maintenance - Maintain LOVs Master List (page)

List Code	List Name	Last Update	List Description	Action
AREA_LIST	AREA LIST	07/20/2010	LIST OF FISHING AREAS. ALSO CONSIDERED GRID LOCATIONS.	View
COLLECTOR_LIST	COLLECTOR LIST	07/20/2010	A LIST OF COLLECTORS WHO PROVIDE SAMPLES TO THE LAB	View
COUNTY_LIST	COUNTY LIST	07/28/2010	COUNTY LIST	View
EDGE_TYPE_LIST	EDGE_TYPE_LIST	08/04/2010	EDGE_TYPE_LIST	View
GAMETE_STAGE_LIST	GAMETE_STAGE_LIST	08/04/2010	GAMETE_STAGE_LIST	View
GEAR_GROUP_LIST	GEAR_GROUP_LIST	07/12/2010	GEAR_GROUP_LIST	View
GEAR_LIST	GEAR_LIST	03/26/2010	GEAR_LIST	View
GONAD_CONDITION_LIST	GONAD_CONDITION_LIST	08/04/2010	GONAD_CONDITION_LIST	View
HISTOLOGICAL_CLASS_LIST	HISTOLOGICAL_CLASS_LIST	08/04/2010	HISTOLOGICAL_CLASS_LIST	View
LOCATION_LIST	LOCATIONS	07/28/2010	LIST OF LOCATIONS WHERE SAMPLES ARE	View
LOV_LIST	LOV LIST	07/28/2010	THIS IS A LIST OF LISTS FOR BSD	View
MACKEREL_STATE_LIST	MACKEREL_STATE_LIST	03/10/2010	MACKEREL_STATE_LIST	View
MACRO_CLASS_LIST	MACRO_CLASS_LIST	08/04/2010	MACRO_CLASS_LIST	View
MICRO_STAGE_LIST	MICRO_STAGE_LIST	08/04/2010	MICRO_STAGE_LIST	View
MODE_LIST	MODE_LIST	03/10/2010	MODE_LIST	View
NOT_STORED_REASON_LIST	NOT STORED REASON LIST	07/21/2010	REASON FOR NOT STORING A SAMPLE ITEM (IN A BOX)	View
POST_OV_FOLLICLES_LIST	POST_OV_FOLLICLES_LIST	08/04/2010	POST	View
PRESERVATION_TYPE_LIST	PRESERVATION_TYPE_LIST	08/18/2010	PRES	View
PRIOR_SPAWNING_IND_LIST	PRIOR_SPAWNING_IND_LIST	08/04/2010	PRIOR	View
READABILITY_LIST	READABILITY_LIST	08/04/2010	READ	View

Total items: 28

1 2 > Last

Export: CSV PDF

Click the View link to begin working with a List of Values (LOV)

The first list you see is the List of Values List (LOV List) which contains all the BSD lists (master list). From here users can view each of the lists.

Maintenance - Maintain LOVs Master List (features)

- The first list displayed is the List of Values List (LOV List)
 - The LOV List contains all the BSD lists (master list)
- Click the View link to begin working with a list
 - **Note: the only action allowed from the master list page is "View", and there is no "New" button. New lists can not be added to the master list without IRM support.**

Maintenance - Maintain LOVs

Menu Navigation: Menu → Maintenance → Maintain LOVs → View a List

Purpose: Maintain the items in a "pick list" used throughout the BSD system

From the LOV Master List users choose which list they want to maintain, such as COLLECTOR_LIST. The first page lists the individual items from the list along with other useful information. There are typically two actions which can be taken from the listing page: New to create a new list item, Edit to edit an existing list item.

Note: in most cases it is not necessary to ADD items to the lists shared with TIP Online. When necessary, new items are automatically created during the Inventory Receive process when the source is TIP. However the name and description may need to be changed to values more familiar to the users of the system.

Typical Actions

- View the list values
 - **Note:** columns can be sorted by clicking the column heading
- Choose a list item to edit
- Create a new list item
- Export the list to a desktop spreadsheet

Screen Shots (page layout)

Maintenance - Maintain LOVs Example: COLLECTOR_LIST (page)

Maintain List The name of the list Code, Name, and Description values Create new list item Items/Page: 20

COLLECTOR LIST New

Item Code	Item Name	Item Description	Last Update	Last Updated By	Enabled	Action
ALEFORT	A.LEFORT	A.LEFORT	08/30/2010	BEVERLY BARNETT	✓	Edit
BBOURGEO	B.BOURGEO	B.BOURGEO	08/30/2010	BEVERLY BARNETT	✓	Edit
BKALMEYE	B.KALMEYE	B.KALMEYE	08/12/2010	JAY OLEARY	✓	Edit
CBRADSHA	C.BRADSHA	C.BRADSHA	08/12/2010	JAY OLEARY	✓	Edit
CDENNIS	C.DENNIS	C.DENNIS	08/30/2010	BEVERLY BARNETT	✓	Edit
CLLULL	C.LLULL	C.LLULL	08/12/2010	JAY OLEARY	✓	Edit
CMANSFIELD	C.MANSFIELD	C.MANSFIELD	08/30/2010	BEVERLY BARNETT	✓	Edit
DBATISTE	D.BATISTE	D.BATISTE	08/30/2010	BEVERLY BARNETT	✓	Edit
DFABLE	D.FABLE	D.FABLE	08/30/2010	BEVERLY BARNETT	✓	Edit
DHOKE	D.HOKE	D.HOKE	08/12/2010	JAY OLEARY	✓	Edit
DPLAYER	D.PLAYER	D.PLAYER	08/12/2010	JAY OLEARY	✓	Edit
ELITTLE	E.LITTLE	E.LITTLE	08/30/2010	BEVERLY BARNETT	✓	Edit
EPULIDO	E.PULIDO	E.PULIDO	08/12/2010	JAY OLEARY	✓	Edit
GMOORE	G.MOORE	G.MOORE	08/12/2010	JAY OLEARY	✓	Edit
HMILLER	H.MILLER	H.MILLER	08/12/2010	JAY OLEARY	✓	Edit
HROLLS	H.ROLLS	H.ROLLS	08/12/2010	JAY OLEARY	✓	Edit
JJENSEN	J.JENSEN	J.JENSEN	08/30/2010	BEVERLY BARNETT	✓	Edit
JRENALDO	J.RENALDO	J.RENALDO	08/12/2010	JAY OLEARY	✓	Edit
JWEEKS	J.WEEKS	J.WEEKS	08/30/2010	BEVERLY BARNETT	✓	Edit
KDONCAST	K.DONCAST	K.DONCAST	08/30/2010	BEVERLY BARNETT	✓	Edit

Total items: 36 1 2 > Last The date and user who last changed the list item Export: CSV PDF

Maintenance - Maintain LOVs Example: COLLECTOR_LIST (features)

- Display the name of the list being viewed/maintained
- List the values from the list
 - Item Code, Name, Description
- Display the date and user who last modified the list item
- Display if the list item is enabled
 - Disabled items no longer appear in pick lists
- Choose an action
 - New - create a new list item
 - Edit - edit an existing list item

Maintenance - Maintain LOVs - Edit List Item

Menu Navigation: Menu → Maintenance → Maintain LOVs → View a List → Edit List Item

Purpose: Maintain the items in a "pick list" used throughout the BSD system

From the LOV Master List users choose which list they want to maintain, such as COLLECTOR_LIST. From there the user can list the items and choose an item to edit.

Note: in most cases it is not necessary to ADD items to the lists shared with TIP Online. When necessary, new items are automatically created during the Inventory Receive process when the source is TIP. However the name and description may need to be changed to values more familiar to the users of the system.

Typical Actions

- View the list values
 - Note: columns can be sorted by clicking the column heading
- Choose a list item to edit
- BSD opens the Edit List Item

Screen Shots (page layout)

Maintenance - Maintain LOVs - Edit List Item (page)

Edit List Item *The name of the list* *Read only when item is in use* *Edit the name or description. Without changing the meaning!*

COLLECTOR LIST

Item Code: ALEFORT

Item Name: ALEFORT

Item Description: ALEFORT

Enabled *Disable the item to exclude it from pick-lists*

Back **Save** *Unable to delete items which are in use*

Cancel changes **Save changes**

Maintenance - Maintain LOVs - Edit List Item (features)

- Display the name of the list being viewed/maintained
- Item Code is read only when the item is in use
- Users can edit the name and description.
 - Note: it is not advised to change the meaning of a list item. If a different meaning is needed, disable the item and create a new one
- Disable an item (un-check Enable) to remove the item from future pick-lists
- Back: cancel changes and return to the list
- Save: save changes to the database
- Delete: (not shown) delete the item from the database
 - Note: unable to delete items which are in use, disable instead

Maintenance - Maintain LOVs - Edit List Item - Example 2 (page)

Edit List Item *The name of the list* *Editable when item not in use* *Edit the name or description. Without changing the meaning!*

LOCATIONS

Item Code:

Item Name:

Item Description:

Enabled *Disable the item to exclude it from pick-lists*

Cancel changes *Save changes* *Delete items which are in use*

Maintenance - Maintain LOVs - Edit List Item - Example 2 (features)

- In this example the item is not in use
 - Item Code editable
 - Item can be deleted

Maintenance - Maintain LOVs - Edit List Item - Example 3: Gear List (page)

Edit List Item

GEAR LIST

Item Code:

Item Name:

Item Description:

Item Group: *Gear List items have an additional value for Item Group - which is also a list in itself*

Enabled

Maintenance - Maintain LOVs - Edit List Item - Example 3: Gear List (features)

- The Gear List items have an additional value for Item Group
 - Allows users to associated all gears to a (higher level) group
 - The gear group list is used in pick list - not the gear list
- The Gear List Item Group is also list

Maintenance: Maintain Users

The Maintain Users pages of the BSD system provides the interface for creating and modifying data of BSD users. Through Maintain Users new users can be added to the system and information for existing users can be edited such as disabling a users, modifying a user's location, or changing a user's password.

Maintenance - User List

Menu Navigation: Menu → Maintenance → Maintain Users

Purpose: List the users of the BSD system for the purposes of creating or maintaining user information

The first page of Maintain Users lists all the active user in the BSD system, with an option to include inactive users in the list. The list can be exported to a spreadsheet. Actions include New User or Edit User which navigates to pages to create new user or edit information on existing users.

Typical Actions

- List the active users of the system
 - Include inactive users in the list (optional)
- Create a new user
- Edit an existing user

Screen Shots (page layout)

Maintenance - Maintain Users - User List (page)

The screenshot shows the 'Maintain Users' interface. At the top, there is a title 'Maintain Users' and a link 'Display inactive users'. On the right, there is a 'Create a new user' button and a dropdown menu for 'Items/Page' set to '20'. Below the title is a 'Show Inactive' checkbox. The main part of the interface is a table with the following columns: First Name, Last Name, Role, Location, Email, Enabled, and Action. The table contains 11 rows of user data. At the bottom left, it says 'Total items: 11'. At the bottom right, there is an 'Export list to spreadsheet' button and an 'Export: CSV PDF' button.

First Name	Last Name	Role	Location	Email	Enabled	Action
BEVERLY	BARNETT	ADMINISTRATOR	PANAMA CITY	BEVERLY.BARNETT@NOAA.GOV	✓	Edit
CASSIO	DESANCTIS	ADMINISTRATOR	BEAUFORT	CASSIO.DESANCTIS@NOAA.GOV	✓	Edit
DAN	CARR	ADMINISTRATOR	BEAUFORT	DANIEL.CARR@NOAA.GOV	✓	Edit
JANET	DOE	USER	BEAUFORT	JANET.DOE@NOAA.GOV	✓	Edit
JAY	OLEARY	ADMINISTRATOR	BEAUFORT	JAY.OLEARY@NOAA.GOV	✓	Edit
JENNIFER	POTTS	ADMINISTRATOR	BEAUFORT	JENNIFER.POTTS@NOAA.GOV	✓	Edit
LUKE	DERIENZO	ADMINISTRATOR	PANAMA CITY	LUKE.DERIENZO@NOAA.GOV	✓	Edit
TEST	USER	USER	BEAUFORT	TEST.USER@NOAA.GOV	✓	Edit
TRACY	MCCULLOCH	ADMINISTRATOR	BEAUFORT	TRACY.MCCULLOCH@NOAA.GOV	✓	Edit
YANET	JIMEHEZ	USER	PANAMA CITY	YANET.JIMEHEZ@NOAA.GOV	✓	Edit
ZELLA	JONES	USER	PANAMA CITY	ZELLA.JONES@NOAA.GOV	✓	Edit

Maintenance - Maintain Users - User List (features)

- Option to display inactive users

- Create a new BSD user
- Edit an existing BSD user
- Export user list to spreadsheet

Maintenance - Edit User

Menu Navigation: Menu → Maintenance → Maintain Users → Edit User

Purpose: Edit a users information such as; default location, role, email (@noaa.gov required), or disable a login.

The first page of Maintain Users lists all the active user in the BSD system. Click on the edit link for a user to navigate to the Edit User pages.

Typical Actions

- List the active users of the system
- Choose a user to edit or create a new user
- Navigate to edit page

Screen Shots (page layout)

Maintenance - Maintain Users - Edit User (page)

The screenshot shows the 'Edit User' form with the following fields and annotations:

- First Name:** ZELLA
- Last Name:** JONES
- Role:** User
- Location:** PANAMA CITY (Annotation: *Assign the user's default location*)
- User is a Sample Reader:** Place a check mark to include the user in the list of Readers used by the system (Annotation: *User can enter readings*)
- Email:** ZELLA.JONES@NOAA.GOV
- Confirm Email:** ZELLA.JONES@NOAA.GOV
- Password:** [Redacted]
- Confirm Password:** [Redacted]
- Enabled:** (Annotation: *Disable a user's login*)
- Buttons:** Back, Save (Annotation: *Save or cancel changes*)

Maintenance - Maintain Users - Edit User (features)

- Assign a user's default location
- Indicate if a user will have biological sample readings
- Disable a user's login
- Save or cancel changes

Purpose: Preview and export Sample Definition final reading data

When all samples of a sample definition have been assigned final reading values the data can be exported to a desktop spreadsheet.

Typical Actions

- Choose a Sample Definition
- Choose a reading type - Age and Growth readings for otolith, scales, and spines, Histological and Reproductive readings for gonads
- Preview the data and export to desktop spreadsheet

Screen Shots (page layout)

View Final Reading (page)

View Final Reading							
Summary							
Dataset Name	ID	Desc	Age Otolith	Age Scale	Age Spine	Rep	Histo
FINAL READING DEMO	541	Red Snapper	9	0	0	0	0

List of Sample Definitions (one showing)

Final reading totals are displayed as an html link which can be clicked to view the final reading values

No value, no link

How to read the results from the image above: The "Final Reading Demo" Sample Definition contains 9 Age-Otolith final readings for Red Snapper samples.

Generate Final Reading (features)

- List of Sample Definitions (one showing)
- Final reading totals are displayed as an html link which can be clicked to view the final reading values
- When the total is 0, there is no link