SPECIES INFORMATION SYSTEM

ADMINISTRATIVE USER’S GUIDE

National Marine Fisheries Service
Office of Science and Technology

(February 2008)

VERSION V1.0

Created by: Kristan Blackhart Date: February 4, 2008

1.0 Introduction

1.1 System Background

The Species Information System (SIS) will create a storage system of data that will collect common and consistent species information across National Marine Fisheries Services (NMFS) regions, in support of services NMFS provides to fisheries and management services. SIS will also link to new and existing information from other distributed databases.

SIS provides users with web applications for data entry, retrieval, and report generation. SIS directly supports the Office of Sustainable Fisheries' (SF) *Annual Report to Congress on the Status of U.S. Fisheries* as well as other NMFS reporting requirements.

1.2 Document Purpose

The purpose of this document is to provide detailed guidance for SIS Administrative Users performing administrative data entry and updates. Text instructions and screen shots are provided to guide users in performing system tasks. Business rules relating to data entry and system use are also outlined.

1.3 Contact Information

If any assistance is required pertaining to the Species Information System, please contact the Office of Science and Technology via the following phone number:

NMFS/ST6 IT team: (301) 713-2328

2.0 Administrative Tasks

2.1 User Roles

SIS Administrative Users are defined under the following User Roles:

SIS_ADMIN_AUTHOR: allowed to access the Admin menu to create, update, and delete Species records, Stock Records, Stock Group Records, FMP records, Stock Area records, and Jurisdiction records.

SIS_ADMIN_VIEWER: allowed to access the Admin menu to view Species records, Stock Records, Stock Group Records, FMP records, Stock Area records, and Jurisdiction records.

SIS Users with other User Roles may not access the Administrative Data sections.

2.2 Data Entry and Updates

Administrative data sections include Species Management, Stock Management, Stock Grouping, Maintaining FMPs, Maintaining Jurisdictions, and Maintaining Stock Areas. Certain tasks in other data areas (Data Entry, Reports) are also limited to Administrative Users; these include locking or unlocking status determination records and creating entity aliases and report entity lists.

2.3 Change Control Board

The SIS Change Control Board is comprised of representatives from the NMFS Office of Science and Technology and the Office of Sustainable Fisheries. Its members are Richard Methot (F/ST4), Kristan Blackhart (F/ST4), and Karen Greene (F/SF3). The purpose of the Change Control Board is to maintain data consistency and integrity.

All substantive changes to Administrative Data must first be approved by the Change Control Board. If any updates, corrections, or additions are required, please contact Kristan Blackhart (kristan.blackhart@noaa.gov).

3.0 System Characteristics

SIS has several features to assist users in accomplishing their tasks. These features include: helpful hints, confirmation messages, menus, toolbars, working mode switch, data grids, error messages, and an online user manual.

3.1 Helpful Hints

Hints are used throughout all SIS pages. They appear when the user places the mouse over the label of a particular field. Hints assist the user in gaining a greater understanding of the purpose of that field.

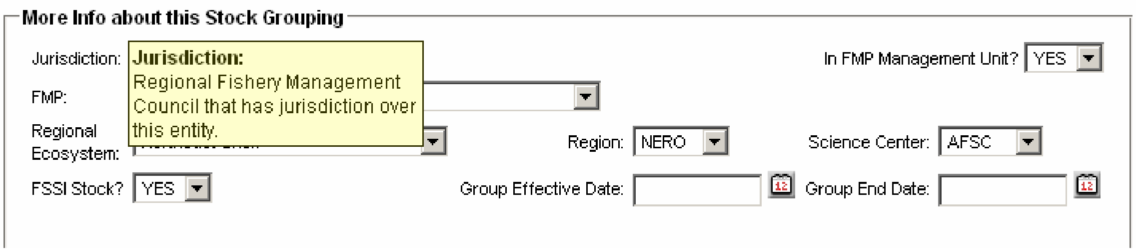


Figure 3.1 SIS screen shot displaying a hint associated with the Jurisdiction field.

3.2 Confirmation Messages

Whenever users perform an action such as saving a new record, updating an existing record, or deleting a record, a message asking for confirmation of the action will be displayed.

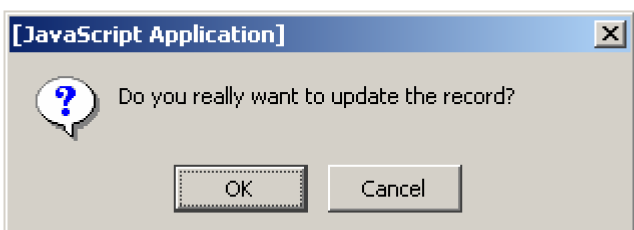


Figure 3.2a SIS screen shot displaying a message asking for confirmation of an action.

Whenever users complete an action such as saving a new record, updating an existing record, or deleting a record, a message indicating the action is completed will be displayed.

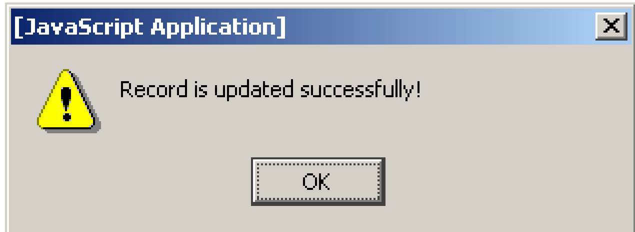


Figure 3.2b SIS screen shot displaying a message indicating the action is successful.

3.3 Menu

The SIS menu allows the user to access the system's modules: Admin, Data Entry (including Assessment and Status Determination), and Reports (configuration, generation). Under each menu item, there is a sub-menu associated with them. For example, if the menu item "Admin" is selected, the Admin submenu will be displayed with items such as: Species, Stock, Stock Group, Stock Areas, Jurisdictions, and FMPs. Users can then select a further desired action.

Main Menu

Submenu

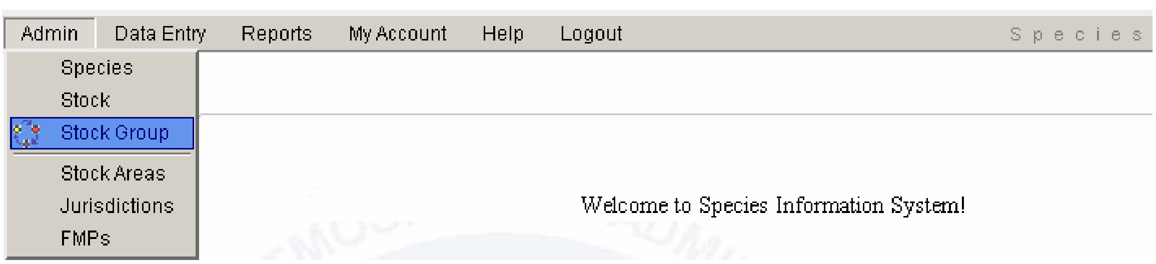


Figure 3.3 SIS screen shot displaying the main menu bar and Admin submenu.

3.4 Toolbar

Along with the main menu that is displayed on all SIS pages, each SIS module has an attached toolbar shown on the top of each screen (below the main menu bar). The toolbar consists of buttons specific to the module.

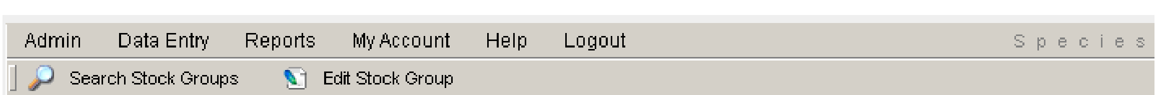


Figure 3.4 SIS screen shot of the Stock Group attached toolbar.

3.5 Screen Layout and Mode Switch

Below the Menu and the toolbar, SIS screen is divided into two frames. The left side is the Search Frame and the right side is the Edit Frame. To change the size of the Search Frame and Edit Frame, use the following approaches:

1. **Change the size of the Search or Edit frames.** Drag the border bar between the Search Frame and the Edit Frame to increase or decrease the size of the frame.

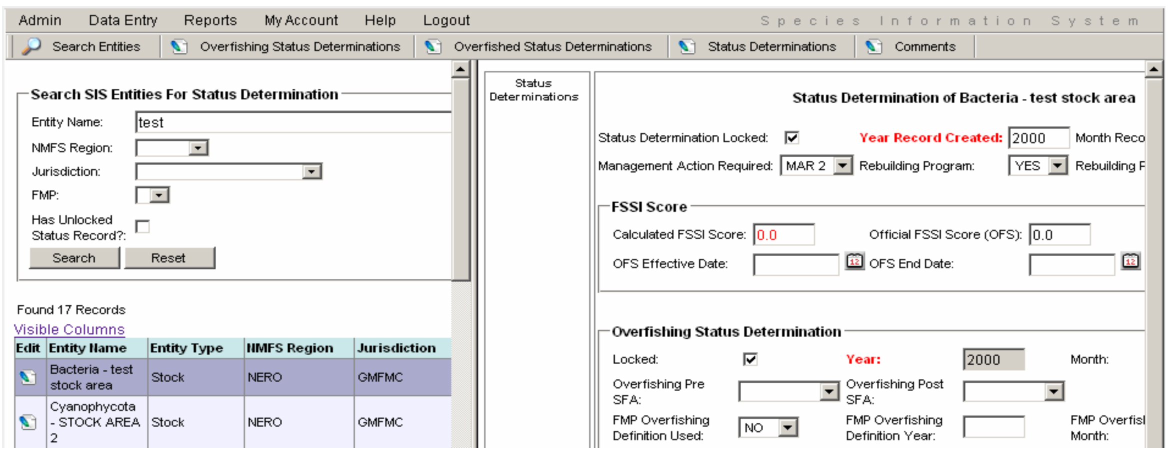


Figure 3.5a SIS screen shot showing the border bar between the Search and Edit frames.

2. **Expand the Search frame.** Click the "Search XXX" button on the toolbar, for example "Search Entities" 

. The search frame will expand to full screen and the edit frame will be hidden.

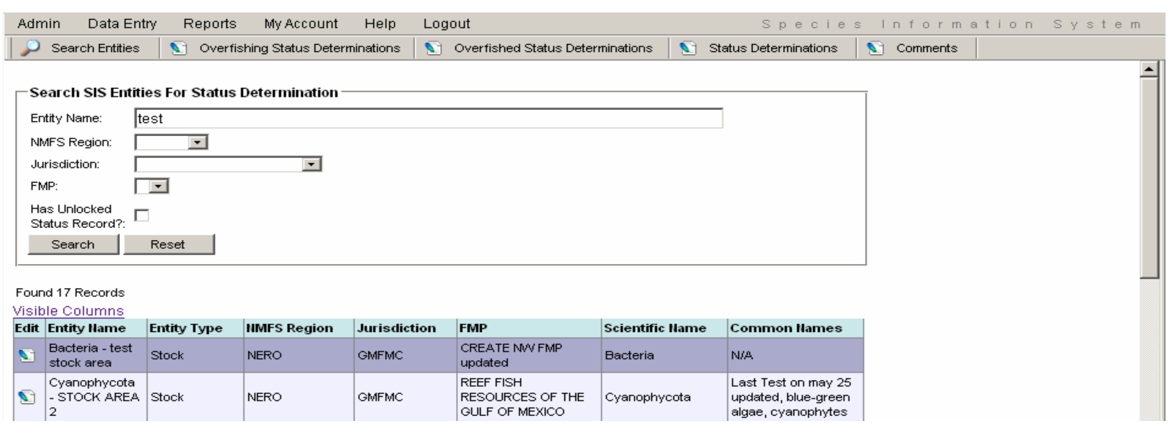


Figure 3.5b SIS screen shot showing the Search frame expanded to full screen.

3. **Restore the Edit Frame.** Click on the Edit Button (such as Status Determination 

) on the toolbar to restore the edit frame to its default size, which shows all input fields.

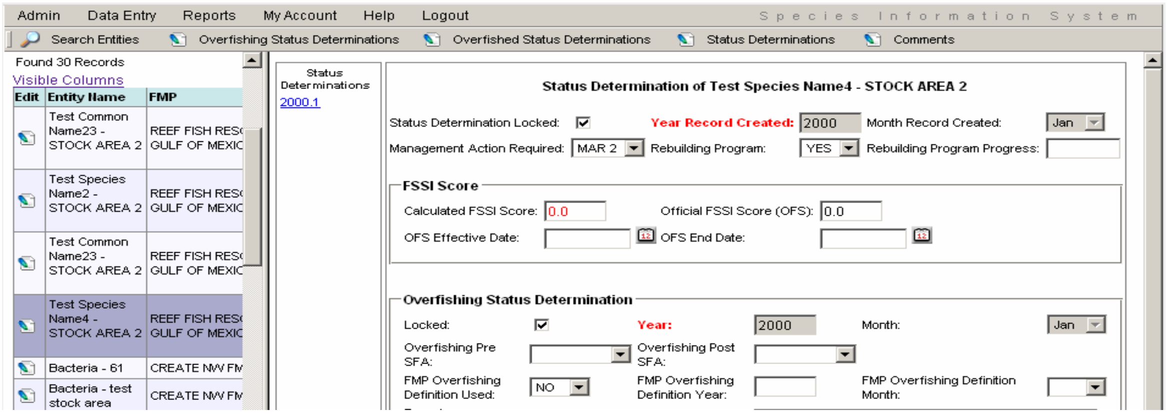
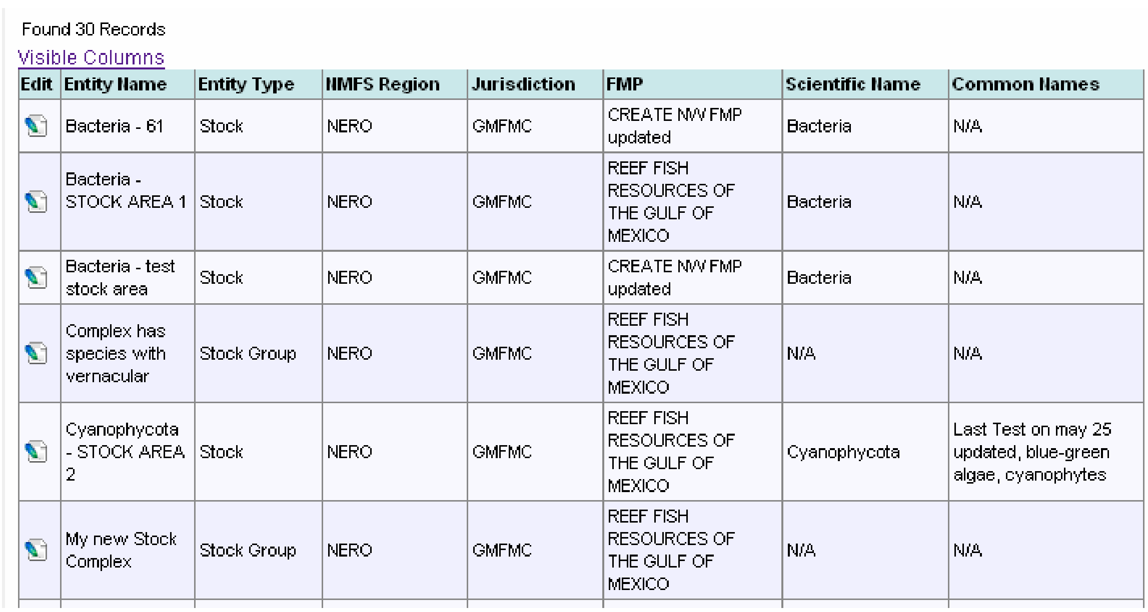


Figure 3.5c SIS screen shot showing the restored Edit frame.

3.6 Search Results Grid

SIS uses a grid to display search results. Below is an example. With this type of grid, users will have more control of how to view the search result.



Found 30 Records

Visible Columns

Edit	Entity Name	Entity Type	NMFS Region	Jurisdiction	FMP	Scientific Name	Common Names
	Bacteria - 61	Stock	NERO	GMFMC	CREATE NW FMP updated	Bacteria	N/A
	Bacteria - STOCK AREA 1	Stock	NERO	GMFMC	REEF FISH RESOURCES OF THE GULF OF MEXICO	Bacteria	N/A
	Bacteria - test stock area	Stock	NERO	GMFMC	CREATE NW FMP updated	Bacteria	N/A
	Complex has species with vernacular	Stock Group	NERO	GMFMC	REEF FISH RESOURCES OF THE GULF OF MEXICO	N/A	N/A
	Cyanophycota - STOCK AREA 2	Stock	NERO	GMFMC	REEF FISH RESOURCES OF THE GULF OF MEXICO	Cyanophycota	Last Test on may 25 updated, blue-green algae, cyanophytes
	My new Stock Complex	Stock Group	NERO	GMFMC	REEF FISH RESOURCES OF THE GULF OF MEXICO	N/A	N/A

Figure 3.6a SIS screen shot of search results display grid.

1. **Select a record to view/edit.** Click on the edit icon of a record and the record will be displayed in the edit frame to view/edit.

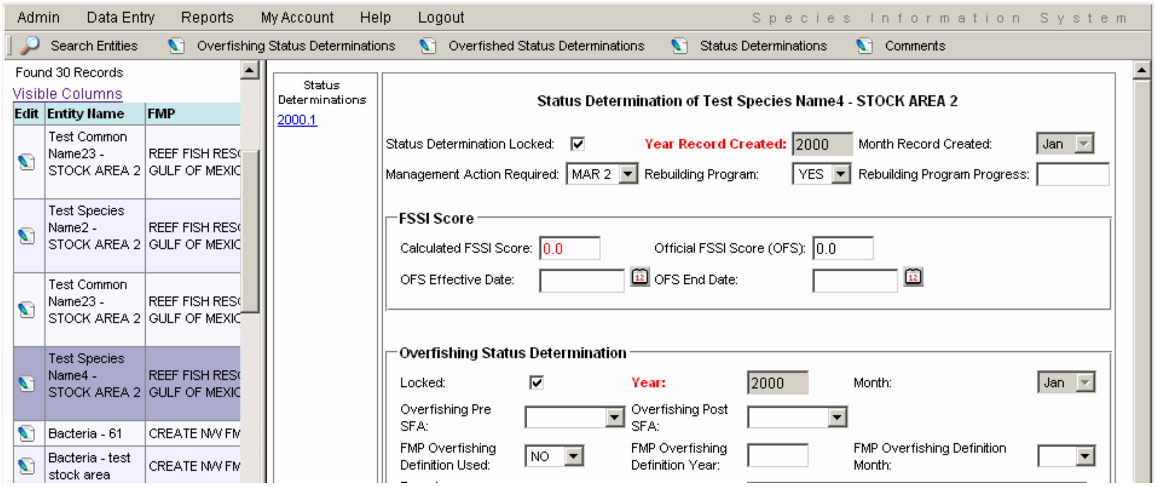


Figure 3.6b SIS screen shot of the edit icons in the search results grid and the record displayed by clicking it.

2. **Change the order of the columns**. Move your mouse over the column header to be moved. Press and hold the mouse button to change the header to red, and then drag to the destination column. Release the mouse to drop the column into the new position.

Found 30 Records

Visible Columns

Edit	Entity Name	FMP	Entity Type	NMFS Region	Jurisdiction	Scientific Name	Common Names
	Bacteria - 61	CREATE NW FMP updated	Stock	NERO	GMFMC	Bacteria	N/A
	Bacteria - STOCK AREA 1	REEF FISH RESOURCES OF THE GULF OF MEXICO	Stock	NERO	GMFMC	Bacteria	N/A
	Bacteria - test stock area	CREATE NW FMP updated	Stock	NERO	GMFMC	Bacteria	N/A
	Complex has species with vernacular	REEF FISH RESOURCES OF THE GULF OF MEXICO	Stock Group	NERO	GMFMC	N/A	N/A

Figure 3.6c SIS screen shot of the search results display grid with the FMP column moved from its normal position to next to the Entity Name column.

3. **Change the width of the columns**. Move the mouse over to a separator bar between two columns. Press and hold the mouse to turn the bar red, and then drag the bar to the left or right to the desired width. Release the mouse.

Found 30 Records

Visible Columns

Edit	Entity Name	FMP	Entity Type	NMFS Region	Jurisdiction	Scientific Name	Common Names
	Bacteria - 61	CREATE NW FMP updated	Stock	NERO	GMFMC	Bacteria	N/A
	Bacteria - STOCK AREA 1	REEF FISH RESOURCES OF THE GULF OF MEXICO	Stock	NERO	GMFMC	Bacteria	N/A
	Bacteria - test stock area	CREATE NW FMP updated	Stock	NERO	GMFMC	Bacteria	N/A
	Complex has species with vernacular	REEF FISH RESOURCES OF THE GULF OF MEXICO	Stock Group	NERO	GMFMC	N/A	N/A

Figure 3.6d SIS screen shot showing the FMP column being resized.

4. **Sort on Columns**. Click and release the mouse on a column header to sort the data by that data column (alternatively in ascending and descending order).

Found 30 Records

Visible Columns

Edit	Entity Name	FMP	Entity Type	NMFS Region	Jurisdiction	Scientific Name	Common Names
	Stock Group with ESA and FED	COASTAL MIGRATORY PELAGICS OF THE GULF OF MEXICO AND SOUTH ATLANTIC	Stock Group	NERO	SAFMC / GMFMC	N/A	N/A
	asd new	COASTAL MIGRATORY PELAGICS OF THE GULF OF MEXICO AND SOUTH ATLANTIC	Stock Group	NERO	SAFMC / GMFMC	N/A	N/A
	test 2	COASTAL MIGRATORY PELAGICS OF THE GULF OF MEXICO AND SOUTH ATLANTIC	Stock Group	PIRO	SAFMC / GMFMC	N/A	N/A
	Test Common Name3 - STOCK AREA 3	COASTAL MIGRATORY PELAGICS OF THE GULF OF MEXICO AND SOUTH ATLANTIC	Stock	PIRO	SAFMC / GMFMC	Test Species Name3	N/A

Figure 3.6e Screen shot of the FMP data column sorted in ascending order.

5. **Select columns to hide/show.** Click on the "Visible Columns" link to show a pop-up window displaying the names of the columns. Check/uncheck the column(s) to show/hide.

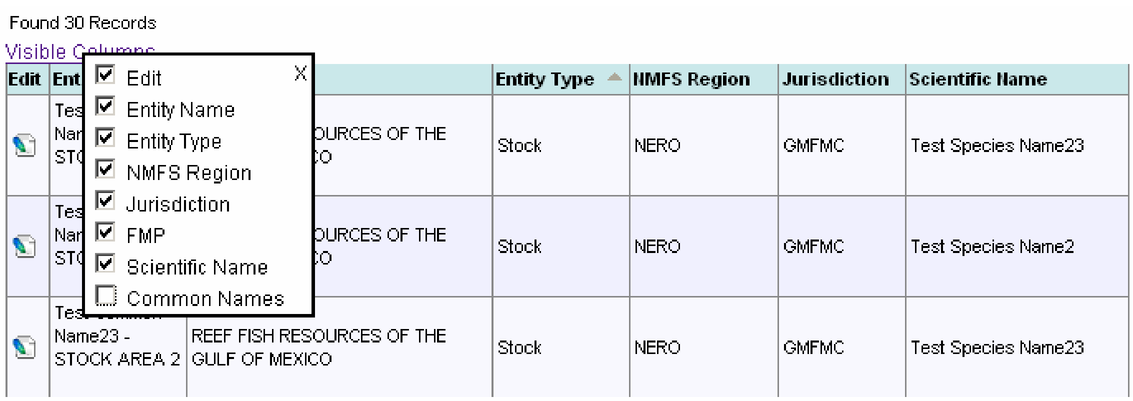


Figure 3.6f Screen shot showing the visible columns pop-up.

4.0 Manage SIS records

All SIS records are managed in a similar fashion. This section describes the common approach to create, search, retrieve, update, and delete records.

4.1 Search Existing Records

1. Click the Search XXX button in the Toolbar.
2. Enter search criteria.
3. Hit Enter or click the Search button.
4. Search results will be displayed in a grid.

4.2 Retrieve an Existing Record

1. Search the record first (refer to “Search Existing Records” above).
2. Click the Edit icon next to the record.
3. The record will be displayed in the Edit Frame.

4.3 Update a Record

1. Retrieve the record first (refer to “Retrieve an Existing Record” above).
2. Make changes. If errors are made, the Reload button can be used to revert back to the last saved version of the record.
3. Click the update button to commit the changes to the database.

4.4 Delete an Existing Record

1. Retrieve the record first (refer to “Retrieve an Existing Record” above).
2. Click the “Delete” button.
3. Confirm that the record should be deleted.

4.5 Create a New Record

1. Click the New button in the Edit Frame.
2. Enter data.
3. Click the Save button to commit to the database.
4. Some modules have a “Clone” button that will allow you to create a new record that is identical to the record currently displayed on the screen. You can then make necessary changes and Save the new record.

5.0 Species Management Pages

The Species Management Screen can be found by clicking on Admin from the main menu and then selecting Species. This page contains SIS species entries and related information such as common names and resource type. New records for tracked species not currently existing in SIS can be added here. Updates to existing species records can also be made.

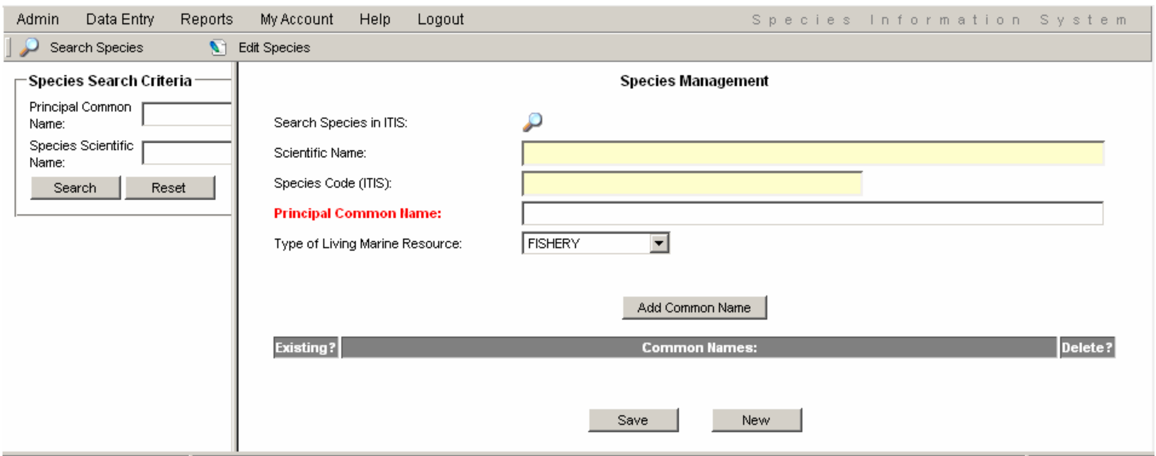
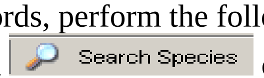


Figure 5.0 Screen shot displaying the Species Management page.

5.1 Search/Retrieve Existing Species Records

To search/retrieve SIS Species records, perform the following steps:

1. Press the Search Species button  on the Species Management Toolbar.
2. Enter search criteria. For example enter a Scientific Name. If the complete value of a field is not known, the % sign may be used as a wildcard to substitute for unknown characters.
3. Press the Search button  . The record(s) that match your search criteria should now appear on the page. If the Search button is pressed with no specific search criteria selected, the System will perform an “open query.” This “open query” will result in the form retrieving all existing records in the database.
4. To retrieve/view a species record, click on the edit button  of the species of interest and the species information will appear in the edit page.

5.2 Update Existing Species Records

Authorized users may update existing species records with species information such as Principal Common Name, Common Names, and Type of Living Marine Resource. However, species related data including the Integrated Taxonomic Information System (ITIS) code and scientific name cannot be updated. If there has been a change to such data through taxonomic reclassification, a new record must be created (see below). To update records, perform the following steps:

1. Search for the species that you would like perform updates for.
2. Click on the edit button  of the species of interest and the species information will appear in the edit page.
3. Make the necessary changes for the record.
4. Save the updates by pressing the “Update” button at the bottom of the page.
5. To delete a species record, press the “Delete” button once you have retrieved the record you would like to delete.

5.3 Create New Species Records

Species records in SIS are created based on existing species records within ITIS. To create a new SIS species record, the corresponding ITIS species record must first be located.

1. On the species edit page, click the “New” button at the bottom of the page and then click on the “Search Species in ITIS” button. This will open up a working space to search species in ITIS.
2. Enter search criteria and click the “Search” button. Search results will be displayed in a search results table below.
3. Click on a species’ scientific name or Taxonomic Serial Number (TSN or ITIS code) in the search results table to select that species.
4. The new SIS species record will be automatically populated with the selected species scientific name and ITIS code.
5. Any additional common names can be added to the record by clicking the “Add Common Names” button.
6. Enter **Principal Common Name** for the species. The principal common name should be the accepted common name found in the most recent version of *Common and Scientific Names of Fishes* and related volumes.
7. Select **Type of Living Marine Resource.**
8. Click on the Save button to save the new record (a stock record for the newly created species record will have to be created as well; see Section 6.3).

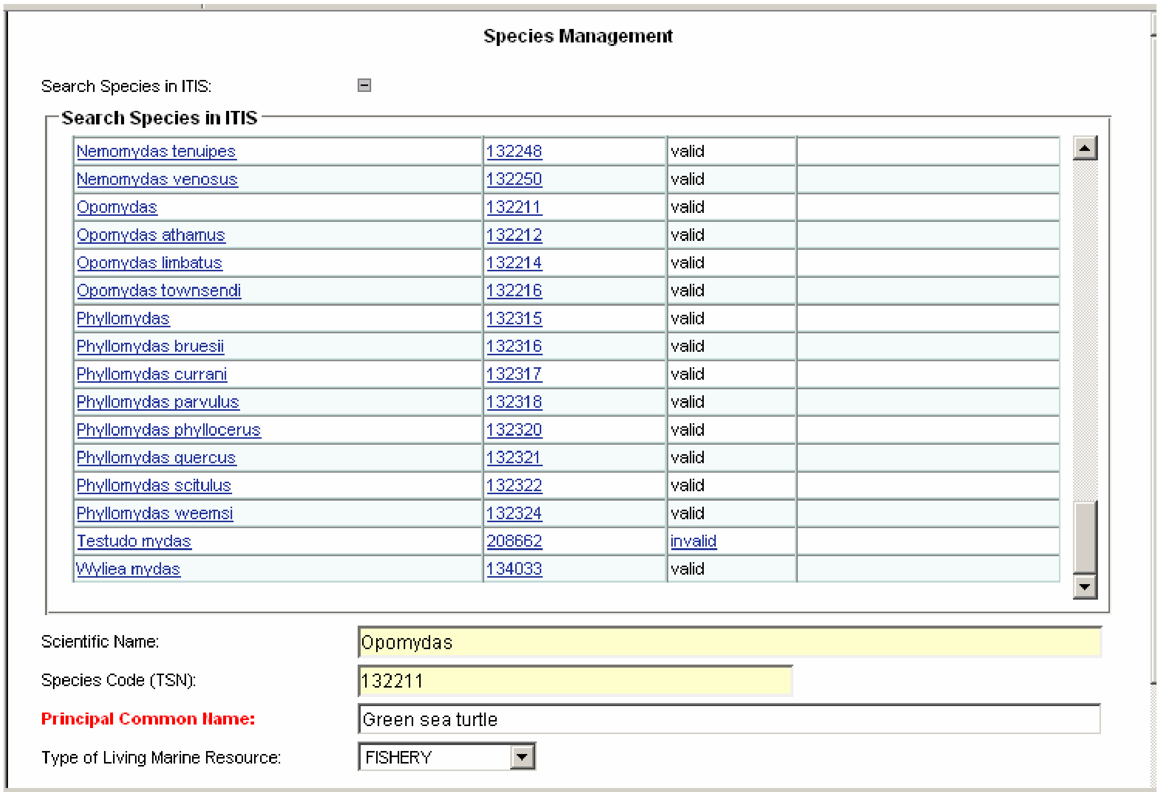


Figure 5.3 Screen shot displaying the search results table for an ITIS species search.

6.0 Manage Stocks

From the Admin menu, select "Stock" to go to the Stock Management Screen. From this page, SIS stocks can be created and updated.

6.1 Search/Retrieve Existing Stock Records

1. Click the "Search Stocks" button on the Stock Management Toolbar.
2. Enter search criteria and click the "Search" button.
3. Select stock from the search result grid to view its record.

6.2 Update Existing Stock Records

Updates to existing stock records should be made for changes to the principal common name, changes to the stock area name (name only, no actual change to the geographic stock area), changes to the stock end date, or a change to the name of the FMP (name only). To update an existing stock record, perform the following steps:

1. Retrieve a Stock record.
2. Make changes to any data fields in the Stock Edit Page.
3. Click the "Update" button to save the changes to the database.
4. To delete a stock record, press the "Delete" button once you have retrieved the record you would like to delete.

6.3 Create New Stock Records

Stocks can only be created for species that already exist within SIS. To create a new stock record for a species that does not yet exist within SIS, you must first create a new Species record (Section 5.3). New stock records should be created for the following situations: a species is taxonomically reclassified; an existing stock is split into two or more individual new stocks; two or more existing stocks are merged into a single new stock; there is a change to the geographic stock area for an existing stock; an existing species is split into two or more new species; two or more existing species are merged into a single new species; and there is a change to the regulatory information (FMP, Science Center, etc.). When creating a new stock that is associated with an existing stock that is retiring, please be sure to update the end date for the retiring stock (see above section for updates to existing stock records).

1. To add a new Stock record, you must first select the appropriate species by using the Search Species functionality. Click on the "Search Species" button 

on the Stock Edit page to display a workspace for the species search. Enter the appropriate search criteria and click on the "Search" button. The search results will be displayed in a table. Click on a species to select it.
2. Select the appropriate **Jurisdiction** for the new stock from the available list.
3. Select the **FMP** associated with the stock; the FMP list is populated based on the selected Jurisdiction.

4. Select the Stock's **Stock Area** from the list; the stock area list is populated based on the selected FMP.
5. The **Stock Name** will be automatically generated once the Stock Area is selected. The Stock Name is a concatenation of the selected Species' Principal Common Name and the Stock Area.
6. Add the appropriate **Effective Date** for the stock; **End Date** may be left blank unless it is known.
7. Enter regulatory attributes (**Science Center**, **NMFS Region**, **Regional Ecosystem**, **In FMP Management Unit**, and **FSSI**) for the new stock.
8. If the new Stock is listed as endangered or threatened under the Endangered Species Act (ESA), proposed for listing under the ESA, or a NMFS candidate species, enter that information under **ESA Status**.
9. Enter the **FMP Definitions** for the stock related to overfishing and overfished status.

7.0 Manage Stock Groups

From the Admin menu, select Stock Grouping to navigate to the Manage Stock Groups page. On this page, new stock groups can be created and edits can be made to existing stock groups.

7.l Search/Retrieve Existing Stock Groups

1. Click the “Search Stock Groups” button on the Stock Group Management Toolbar.
2. Enter search criteria and click the “Search” button.
3. Select stock group from the search result grid to view its record.

7.2 Update an Existing Stock Group

Updates to existing stock group records can be made to indicate changes to the stock group name or description or to add/update a stock group end date. To update information for an existing Stock Group, use the following steps:

1. Search for the Stock Group you would like and click on it to display it’s information in the edit window.
2. If you would like to add Stocks to the existing Stock Group, click on the Stock Search icon to open up the search work area. Only stocks currently existing in SIS can be added to Stock Groups; if you would like to add a stock that does not exist in SIS, you must first create a new Stock record (see section 4.3).

Figure 7.2a Screen shot displaying the Search Stocks icon.

3. Enter the search criteria and click on the “Search” button.
4. The search results will be displayed in the “Candidates for Grouping” list.
5. To add Stocks to the Stock Group, highlight the Stocks from the list and click the “Add to Group” button. You can select multiple stocks to add at the same time by holding down control while you select Stocks, or holding shift to select a range of Stocks from the list.
6. Stocks can be removed from the Stock Group list by highlighting the Stocks and clicking on the “Delete from Group” button.

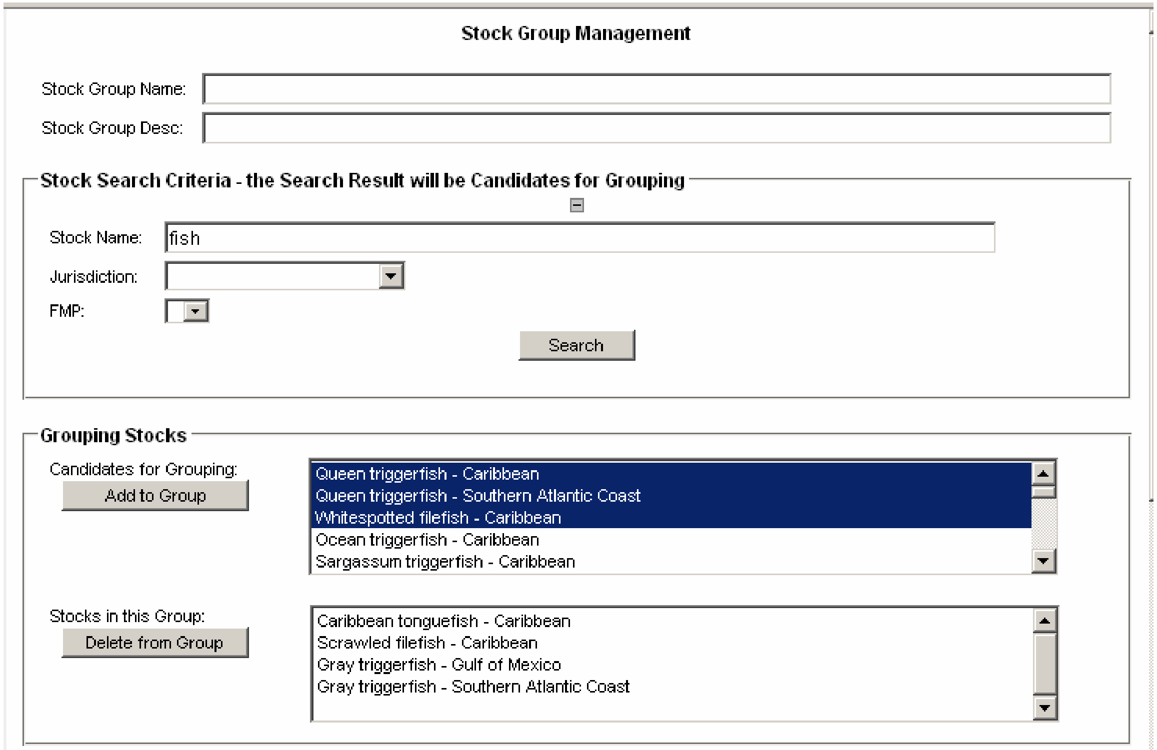


Figure 7.2b SIS screen shot showing the Candidate and Stock Group lists.

7. Click on the “Update” button to save the changes to the Stock Group.
8. To delete an existing Stock Group record, retrieve the record and press the “Delete” button at the bottom of the Edit frame.

7.3 Create New Stock Groups

New stock groups should be created when there has been a change to the regulatory information for existing stock groups, when the complex membership has changed, or when a new indicator stock has been selected for the stock group.

1. To create a new stock group, click on the “New” button on the edit stock groups page.
2. Enter the **Stock Group Name** and **Stock Group Description**.
3. Use the Stock Search function to select stocks to add to the new Stock Group (see previous section).
4. Enter regulatory information for the new Stock Group under “More Info about this Stock Grouping”. These fields are the same as the information that is entered for Stocks.
5. Enter the appropriate **Effective Date** for the stock group.

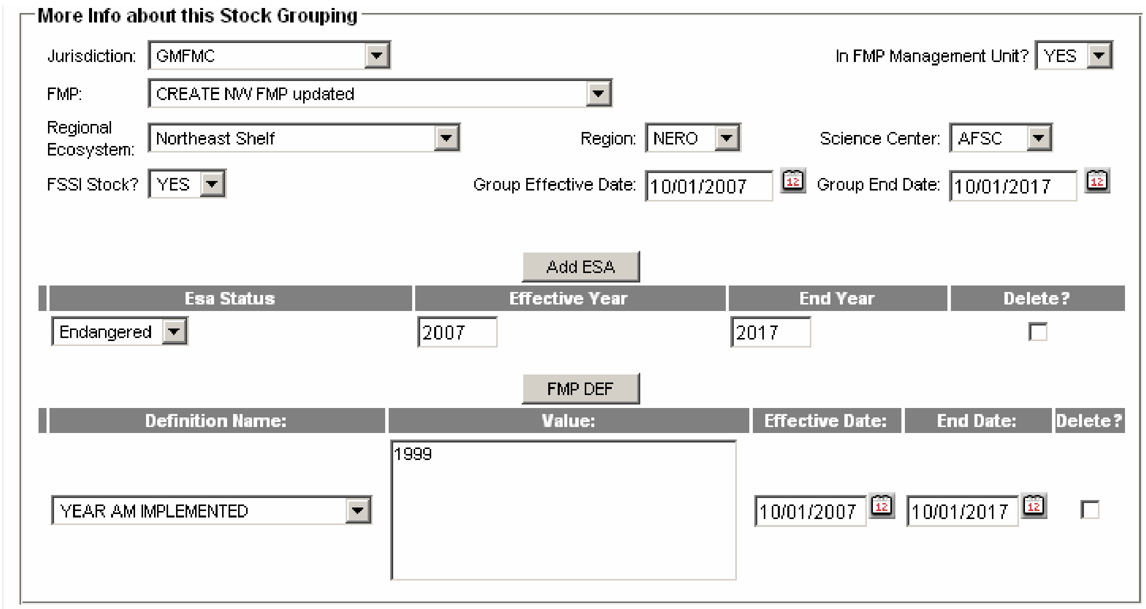


Figure 7.3 SIS screen shot displaying the additional information section on the Stock Group management page.

6. Click on the “Save” button to save the new Stock Group record to the database.

8.0 Maintain Fishery Management Plan (FMP)

Select "Maintain FMP" under the Admin menu to navigate to the Maintain Fishery Management Plan page. This page is used to maintain existing FMPs and add new FMPs to SIS. Each FMP should be related to the Jurisdiction that created it.

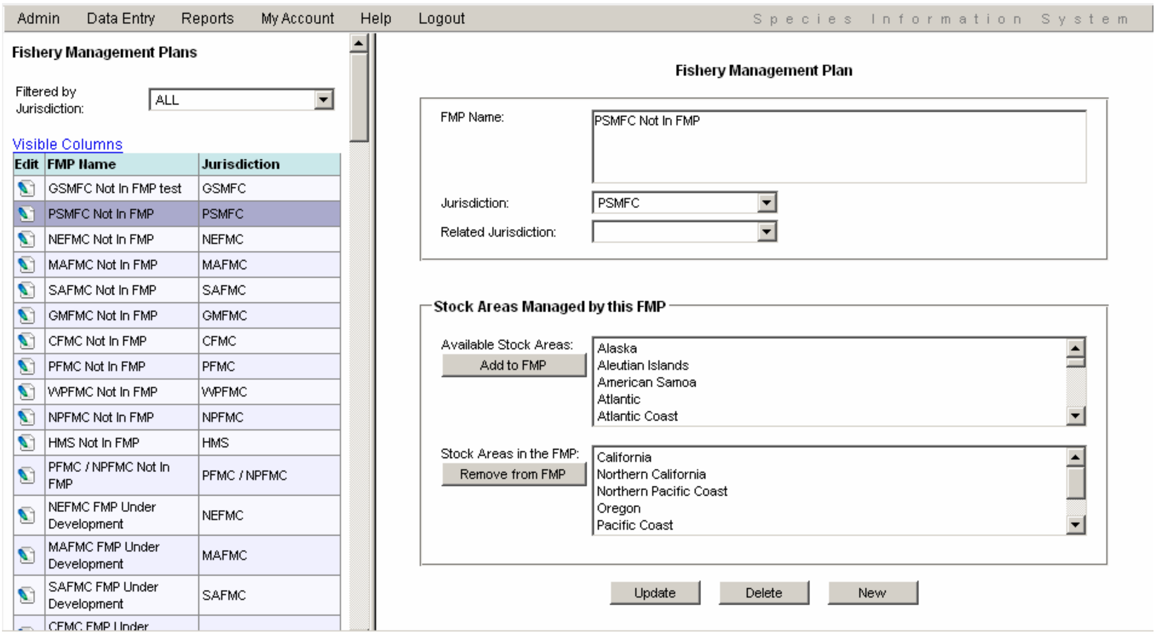


Figure 8.0 SIS screen shot displaying the Fishery Management Plan page.

8.1 Search/Retrieve Fishery Management Plans

By default, all FMPs are displayed in the search results grid. To filter the results, select a Jurisdiction from the list; only FMPs belonging to the selected Jurisdiction will then be displayed.

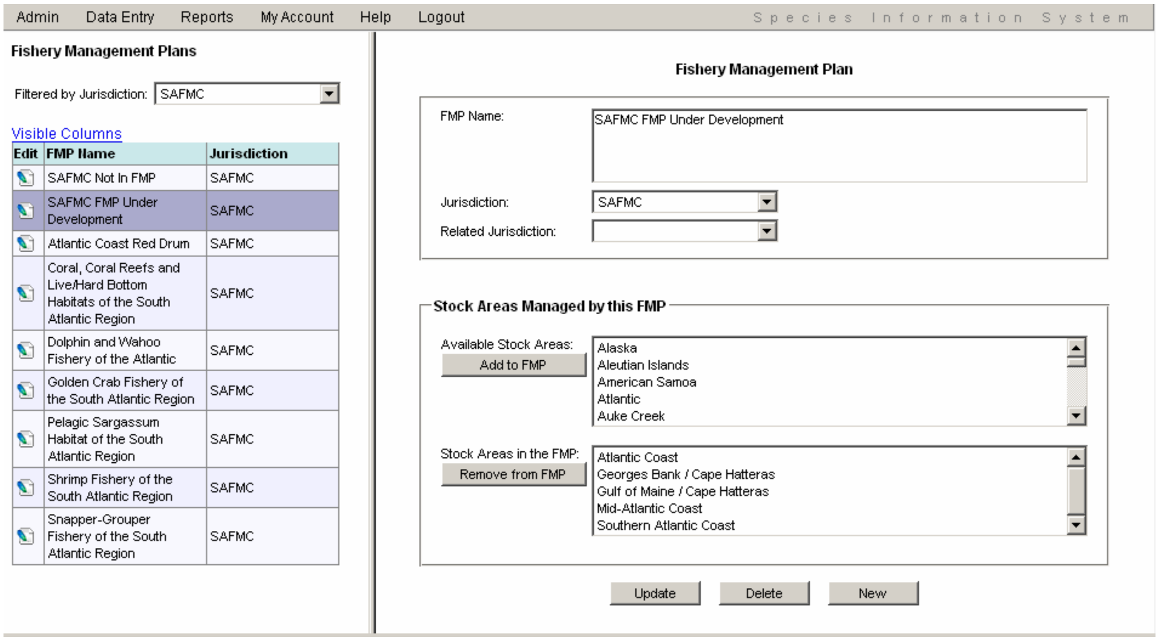


Figure 8.1 SIS screen shot showing the FMP search results grid filtered to display only SAFMC FMPs.

8.2 Update an Existing Fishery Management Plan

Updates to existing FMP records should be made when there has been a change to the FMP name, a change in the stock areas managed by the FMP, to add an end date, or to correct errors. To update an existing FMP record, use the following steps:

1. Retrieve the FMP record by clicking on it in the search results grid. The record will be displayed in the edit frame.
2. Make changes to FMP Name or end date.
3. A FMP may be related to an additional Jurisdiction other than the Jurisdiction that created the FMP. This happens when the FMP includes stocks/stock groups that are under a Jurisdiction that is not the Jurisdiction that created the FMP.
4. To add Stock Areas to the list of Stock Areas in the FMP, select the appropriate Stock Areas from the "Available Stock Areas" list and click the "Add to FMP" button. To select multiple stocks to add at once, use the control or shift buttons on your keyboard.
5. To remove stock areas from the FMP, select the stock areas from the "Stock Areas in this FMP" list and click the "Remove from FMP" button.
6. Click the "Update" button to save changes.
7. To delete an existing FMP, retrieve the record and press the "Delete" button at the bottom of the page.

8.3 Create a New Fishery Management Plan

1. To create a new Fishery Management Plan record, click on the "New" button in the Fishery Management Plan edit frame.

2. Enter the FMP Name and select Jurisdiction and Related Jurisdiction (if applicable).
3. Enter the appropriate Effective Date for the new FMP record.
4. Select stock areas for the FMP from the list of available stock areas and click the "Add to FMP" button.
5. Click "Save" to add the record to the SIS database.

9.0 Maintain Jurisdictions

From the Admin menu, select Jurisdiction to go to the Jurisdiction screen. This page can be used to add new Jurisdictions to SIS and update or delete existing Jurisdictions.

9.1 Search/Retrieve Jurisdictions

By default, all Jurisdictions are displayed in the search results grid. To retrieve a Jurisdiction record, click on the Edit icon next to the Jurisdiction name in the search results grid.

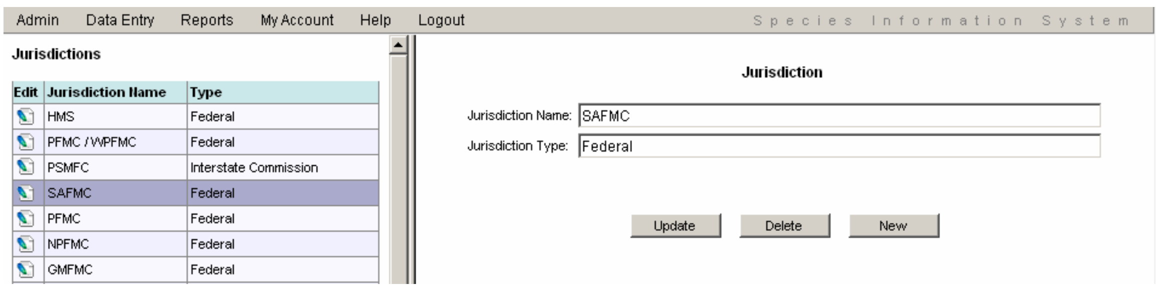


Figure 9.1 SIS screen shot showing a retrieved record on the Jurisdiction screen.

9.2 Update an Existing Jurisdiction

To update an existing Jurisdiction record, use the following steps:
1. Retrieve the Jurisdiction record by clicking on it in the search results grid. The record will be displayed in the edit frame.
2. Make changes to Jurisdiction Name and Type.
3. Click the “Update” button to save changes.
4. To delete an existing Jurisdiction, retrieve the record and press the “Delete” button at the bottom of the page.

9.3 Create a New Jurisdiction

1. To create a new Jurisdiction record, click on the “New” button in the Jurisdiction edit frame.
2. Enter the Jurisdiction Name and select Jurisdiction Type.
3. Click “Save” to add the record to the SIS database.

10.0 Maintain Stock Areas

From the Admin menu, select Stock Area to go to the Stock Area screen. From this page you can add new Stock Areas to SIS, and update or delete existing Stock Area records.

10.1 Search/Retrieve Stock Areas

By default, all Stock Areas are displayed in the search results grid. To retrieve a Stock Area record, click on the Edit icon next to the Stock Area name in the search results grid.

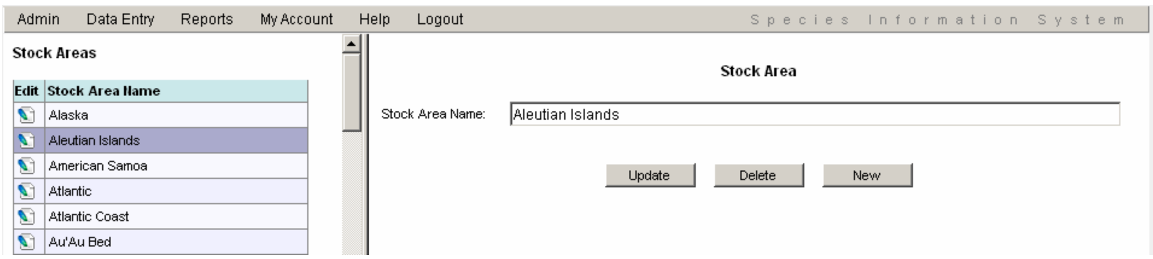


Figure 10.1 SIS screen shot showing a retrieved record on the Stock Areas screen.

9.2 Update an Existing Stock Area

To update an existing Stock Area record, use the following steps:
1. Retrieve the Stock Area record by clicking on it in the search results grid. The record will be displayed in the edit frame.
2. Make changes to Stock Area Name.
3. Click the “Update” button to save changes.
4. To delete an existing Stock Area, retrieve the record and press the “Delete” button at the bottom of the page.

9.3 Create a New Stock Area

1. To create a new Stock Area record, click on the “New” button in the Stock Area edit frame.
2. Enter the Stock Area Name.
3. Click “Save” to add the record to the SIS database.

11.0 Status Determination Administrative Tasks

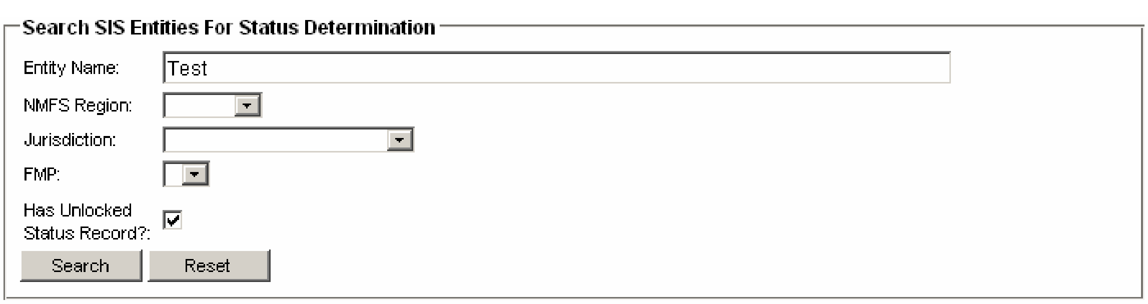
The purpose of locking a record is to create a permanent record of that information. When a **new** Overfishing/Overfished Status Determination Record is **created** it is **unlocked**. This allows the user to enter new information about a stock. As long as an Overfishing/Overfished Status Determination Record remains **unlocked**, users can update that record and that is the record that will be linked to the new Status Determination Record when it is created. Thus, as long as the record remains **unlocked**, any new information that is entered will replace the existing information. When the Administrator is ready to run a report, he/she will perform a search function to see if there are any **unlocked** records (see Section 11.2). Unlocked records should only be those for which new Overfishing/Overfished Status Determination Records were recently created. After locating all **unlocked** records, the Administrator will **lock** all of these records. Locking Overfishing/Overfished Status Determination Records creates a new Status Determination Record for these previously unlocked records. Once all Status Determination Records have been locked the Administrator can run all necessary reports.

11.1 Locking and Unlocking Individual Status Determination Records

1. To lock a Status Determination Record, retrieve the record by searching for it and then clicking on its Edit icon. This will display the record on the Status Determination edit frame.
2. To lock an unlocked record, check the box next to “Status Determination Locked” near the top of the page.
3. To unlock a locked record, uncheck the box next to “Status Determination Locked” near the top of the page.
4. Once a Status Determination record has been unlocked, you can unlock the Overfished and Overfishing records as well by unchecking the box next to “Locked” under Overfished and Overfishing. These records may not be unlocked unless the Status Determination record is unlocked.

11.2 Lock All Status Determination Records

1. You can view a list of all Entities that have an unlocked Status Determination record by checking the “Has Unlocked Status Record” box in the search screen.


Search SIS Entities For Status Determination

Entity Name: Test

NMFS Region:

Jurisdiction:

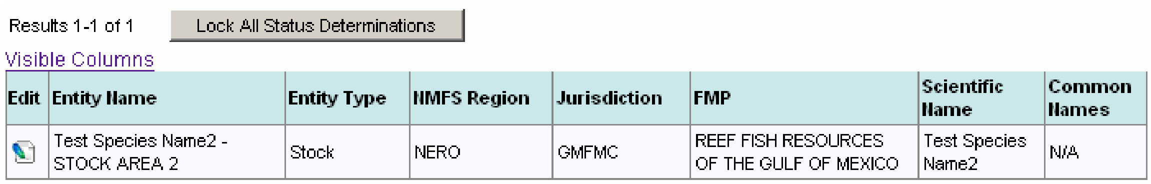
FMP:

Has Unlocked Status Record?: ☑

Search Reset

Figure 11.2a   SIS screen shot displaying a search for unlocked records.

2. If there are Entities found with unlocked Status Determination record, a "Lock All Status Determination Record" button Lock All Status Determinations will be displayed above the search result grid.



Results 1-1 of 1 Lock All Status Determinations

Visible Columns

Edit	Entity Name	Entity Type	NMFS Region	Jurisdiction	FMP	Scientific Name	Common Names
	Test Species Name2 - STOCK AREA 2	Stock	NERO	GMFMC	REEF FISH RESOURCES OF THE GULF OF MEXICO	Test Species Name2	N/A

Figure 11.2b   SIS screen shot displaying search results for unlocked records and "Lock All Status Determinations" button.

3. Click the "Lock All Status Determination Record" button and confirm to lock the records. **Note:** The SIS web application doesn't provide the functionality to unlock multiple status determination records at once. They have to be unlocked individually.

12.0 Report Administrative Tasks

Admin users are responsible for creating necessary entity aliases and report entity lists for Reports. Entity aliases allow an alternative stock name to be used in reports, while report entity lists allow users to define lists of stocks for reporting and include entity aliases in these lists.

12.1 Entity Aliases

Select Reports from the main menu and then click on Entity Alias to navigate to the Entity Alias page. From here, you can create new entity aliases or search, view, update, and delete existing aliases. Entity aliases can be used to assign an alternate name to a stock for reporting purposes. To appear in reports, the aliases must be added to a Report Entity List (see section below) that is used to generate the report.

1. To retrieve an existing entity alias record, click on the Search Entity Aliases button on the Alias toolbar. Enter search criteria and press the “Search” button. From the search results grid, click on the Edit icon next to the entity name to view/update the Alias record.
2. Once you have retrieved an Alias record, you may update it. Enter the desired changes and click on the “Update” button to save the changes.
3. To delete and existing Alias record, retrieve the record and press the “Delete” button.
4. To create a new Entity Alias record, press the “New” button in the edit frame. Enter the appropriate information for Alias Name, Report Level, and Effective/End Dates. To select the existing entity that you would like to create the Alias for, click on the Search Entities icon to open the search box. Enter the search criteria and press the “Search” button. Select the desired entity by clicking on it. Click the “Save” button to commit the new record to the database.

12.2 Report Entity Lists

From the Report submenu, select Report Entity List to go to the Report Entity List screen. Here you can create report entity lists to specify groups of stocks for reports and designate Entity Aliases to be displayed as names in the report lists. Existing report entity lists can also be updated or removed from the Report Entity List page.

1. To search/retrieve an existing report entity list, click on the “Search Report Entity Lists” button on the Report Entity List toolbar. Enter your search criteria and press “Search”. To view a Report Entity List record, click on the Edit icon next to the desired entity list in the search results grid.
2. Updates may be made to existing Report Entity Lists by retrieving the record first. To add stocks to the list, enter search criteria into the search box and press “Search”. This will display a list of stocks matching the stated criteria; highlight the desired stocks and click “Add to List” to move them to the Report Entity List. To remove stocks, highlight stocks from the “Entities in this List” table and click “Delete from List”. Make other changes as necessary and click on “Update” to save the changes.

3. Click on “New” on the Report Entity List edit frame to create a new Report Entity List. Enter information and click “Save” to commit to the database.
4. To delete an existing Report Entity List, retrieve the desired list record and click the “Delete” button at the bottom of the edit frame.