

August Webinar 8/25/2016

Attendees: Amy Greenwell (CNHP), Ben Johnke (CSU RSF), Dave Speas (BOR), Kevin McAbee (FWS), Koreen Zelasko (LFL), Andy Treble (CPW), Paul Badame (UDWR)

Key: Question, Action Item

Agenda:

- ❖ *Announcements*
- ❖ *Highlight a few New Features – New Role, Navigating Tabs, Deployment Attributes for Tags*
- ❖ *Preview of Batch Uploads progress*
- ❖ *QC Tools*
- ❖ *Release Schedule*
- ❖ *Webinar Schedule*

Review of PowerPoint Presentation (see 2016_08_25 STReaMS Monthly Techinar Presentation)

- FWS has offered the Database Manager position to a highly qualified candidate, and this person has accepted the offer. Paperwork is still ongoing, so Kevin can't announce it yet, but he will announce it in the next couple of weeks. The new person will start in about a month (late Sept/early Oct). **Action Item: Work with Kevin and new Database Manager to schedule a visit to CNHP to see the STReaMS SQL Server database (probably around late October)**
- CNHP needs to meet with Andy Treble to view the CPW 3 species data, and prepare it for upload to STReaMS. **Action Item: Coordinate with Andy to visit CNHP in September.**
- Some Database Manager candidates registered with STReaMS under CNHP. We had three applicants sign up. **Question: Should we remove all of the applicants from STReaMS?** Yes, we should delete these Users now. **Action Item: Amy will remove these User accounts.**
- Kevin and Amy are testing new webinar software that integrates video, audio, and screen sharing into one seamless package. This software, called Vidyo, was rolled out by the USFWS nationwide and there is technical support for it. Support personnel respond quickly. We will keep using the old software for now, but we will eventually migrate to the new software. CNHP is unable to connect to Kevin's Vidyo meeting right now due to firewall issues. We have sent a request to central IT at CSU to open several ports. This should resolve our communication issues with Vidyo. This might be an issue with other partners or agencies (ex. state government) that need to conference with USFWS. It is a good practice to test the software with folks outside the Service prior to a meeting, just to be sure there aren't any firewall issues. **Action Item: Kevin and Amy will retest Vidyo when the ports are open.**
- In the spirit of the Open Data Policy, CNHP has developed a new role with limited viewing privileges, called "Registered User". This new role is intended for users outside of the Program and its circle of Partners. Spatially explicit details are removed from the web pages and download files, but the site is still data rich (fish sizes, movement between rivers, stocking successes, etc. can all be evaluated).

- We now have 4 roles in STReaMS.
 - Registered Users have limited viewing privileges and cannot edit anything
 - Researchers have full viewing privileges and can only edit data if they are a Data Lead on a Study
 - Data Administrators can edit all data associated with their office, regardless of their role on a Study. **Question: How is an “office” defined?** Typically, it is defined as a specific office within an agency, like FWS-GJ or UDWR-Moab. In some cases, like CPW, it is agency-wide because they don’t operate at an office level. This is probably ok because Andy is the only Data Administrator for CPW and likely the only person from that agency that should edit data in STReaMS.
- We reviewed some of the new features under development on CNHP’s test server.
 - We looked at the Registered User webpages, which display limited attributes and limited menus. When this role is pushed to the live server, it will be a good idea to have a few core users sign up with a different email account (ex gmail), and see the site as a Registered User. **Action Item: CNHP will reach out to core users to check the new Registered User role once it is pushed live.**
 - Record details from a list now open in a new tab. This really helps navigating through a list, but can result in a lot of open tabs. For best performance, CNHP recommends using breadcrumbs when you want to review data related to your record and closing the tab when you need to return to your list.
 - There is a new download for look-up table codes so Users can take the most recent code list with them out in the field. Users will need these codes in order to fill out the template datasheets.
 - Deployment attributes have been populated for most Tags including Deploy Date, Deploy River, Deploy River Mile, and the Encounter in which the Tag was deployed. There is still a subset of Tags without attributes that CNHP could not calculate in batch. CNHP is working with Data Managers in both basins to review the rest of the Tags. This fixes the “Most Recent Tag” issue where the system was not reporting the correct most recent tag. Keep in mind the system is using Deploy Date to determine the most recent tag. If these attributes are not known, the most recent tag might not be accurate.
- We reviewed the current status of the batch upload process under development on CNHP’s development server. Ben Johnke gave a demonstration from his computer.
 - The system forces you to select a Study or make a new Study to link to the data records. No data will be imported in batch unless they are connected to a Study.
 - Once your Study is selected, the User selects a file to upload. The system reads all of the tabs in the file and the User selects which tab to import and which data type it belongs to (rare fish datasheet or site effort datasheet).
 - The spreadsheet is analyzed and errors are summarized. A summary paragraph reports the total number of errors and the number of errors per field.
 - A table appears with all of the problem records. Fields with data errors are highlighted. The User can edit the fields directly to fix them. If they are not fixable (i.e. raw data were entered incorrectly and there is no way to know the correct value), they might have to be set to null.

- The User reanalyzes the file. Once it is clean, the user should export a clean version of the file before clicking on the button to import it to the database. **Question: Should downloading the clean file be mandatory?** We don't want users to forget this step. Data in their reports should be derived from the clean file. Yes, make this mandatory. Once the file is clean, the system should automatically launch a download file so the User does not forget this important step. **Action Item: CNHP will change the code to force download of clean file.**
- The system returns a message when the data are imported. Depending on how long the process takes, we might have the system send an email so the User does not have to wait.
- Upload results can be reviewed under My Profile. The User will see a list of his or her uploads and can View Details to see imported Encounters and any records that were flagged or rejected. The User will not be able to fix flagged or rejected records. This must be done by a Database Manager.
- The batch upload rules are on a web page and can be manipulated by the Database Manager.
- We probably need to add an "undo upload" button but we don't want users to take advantage of this, like undoing an entire upload just to fix a few attribute mistakes that met the upload rules and slipped through the cracks. Undo should only be used for major mistakes (ex. having to redo all of the Sample Numbers to link fish data to effort data, fixing entire fields that are transposed, etc.). **Question: Should the User be allowed to undo their upload or should undo be restricted to the Database Manager?** We should give the User some ability to undo, but limit the amount of time they have to do this. We will give the user 24 hours to undo their upload. After that, only the Database Manager will have permission to undo it. **Action Item: CNHP will add an undo button and limit the User's access to it to 24 hrs.**
- There are many quality control tools we need developed to ensure the integrity of data in STReaMS. These are things that cannot be evaluated during the upload process and include:
 - Check for duplicate stocking records, captures, transfers and detections
 - Merge records
 - Change relationships
 - Attribute checks specific to species or hydro areas
 - Batch deletes
 - Search for ghost records? (orphaned data) **Question: What is a ghost record?** These are records that are not connected to features they should be connected to. An example would be a Tag without a Tag Lot or an Individual. How did it get into the system? A Database Manager needs to investigate.
- We will have three upcoming releases this fall/winter.
 - The first release will be within the week and includes a LOT of changes. Be sure to review the release notes. An email will be sent out to everyone when it is live. Part of this release includes the new Registered User role. All new Users will be assigned this role. Data Managers or Data Administrators may need to adjust roles for new Users in their office (ex. switching a new employee from a registered User to a Researcher).

- The following release will be in late September/early October and will include reformatted PIA lists and pages, a new Stocking Event section under Studies, and removal of the defunct Sampling Event.
- The final release for the winter will activate batch uploads. We expect this to be live in late December/early January. Due to the delay, CNHP will upload the 2015 data files for the Program. We have all of the 2015 files from Travis and Scott is almost ready to send us the 2015 files from San Juan. **Question: When will the 2015 data be uploaded?** Researchers need these data in order to prepare for the January Researchers Meeting and really need the data accessible on the site in November. This is doable. **Action Item: CNHP will import the 2015 data by November.**
- Since most of the site is developed and we are down to big features, it doesn't make sense to host webinars every month. Our next webinar will be November 10th. After that, we will meet on January 19th, 2017. Webinars beyond January are TBD. **Action item: Kevin will send out cancellation notices for the September, October, and December webinars, and invitations to the November and January webinars. Amy will email the larger group with the new meeting schedule.**
- The March workshop for STReaMS is March 15 & 16, 2017, at CSU. Kevin is potentially scheduling a one day workshop on March 14th for researchers to discuss population estimates, field data, etc. Aligning it with the STReaMS workshop will cut down on travel costs. It could be the day before or the day after the workshop. The day before might be better, since any questions that arise from that meeting can be addressed at the STReaMS workshop during our "in-depth" session. **Action Item: Kevin will let the group know when this meeting is official so everyone can get it on their calendar.**
- Batch uploads will be a big part of the March Workshop. We will have the ability to use the Test Server, which gives us more flexibility on how we design our exercises. We can ask people to bring their data files from 2016 and practice uploading them into STReaMS. **Question: Do people have to wait until March to upload their data?** Many people in the program are savvy enough to perform these steps as soon as the batch tools are working and should not have to wait until March. As soon as the upload tools are live, Users can load in their data. We can use the March workshop as an opportunity to discuss the User experience, and any suggestions they have to improve the process, or any issues they encountered. We will also assist Users that have not uploaded data yet and guide them through the process.

Thanks Everyone!

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