



Middle Rio Grande Endangered Species Collaborative Program

SCIENCE AND ADAPTIVE MANAGEMENT INFORMATION SYSTEM (SAMIS)

User Guide Version 1.1.1

Welcome to the SAMIS! As we roll out the SAMIS, we want to make your user experience as productive as possible. To do that, we need your help to identify any issues regarding the accuracy of the content or the functionality of the user applications. We ask that you email your comments and suggestions to SAMIShelp@west-inc.com so that we may continue to improve this information system to the benefit of all who use it.

“Knowledge is a tool, and like all tools, its impact is in the hands of the user.”

-- Dan Brown



Photo Credit: Dave Moore

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1.0 ABOUT

For a list of Frequently Asked Questions (FAQs), please click [here](#) to jump to the end of the User Guide.

1.1 Overview

The Science and Adaptive Management Information System (SAMIS) is integral to the Middle Rio Grande Collaborative Program's (MRGESP or Collaborative Program) support of science and adaptive management related to listed species in the Middle Rio Grande. The hub of the SAMIS is the Project Bank, a list of current and proposed activities and associated metadata. As a relational tool, the SAMIS draws linkages between these activities and the uncertainties, recommendations, and planning objectives that the Collaborative Program uses to prioritize research needs and inform decisions.

1.2 System Components

The information system consists of a relational database, user authentication software, a data entry application, a data viewing/reporting application, hosting platforms, data managers, and users.

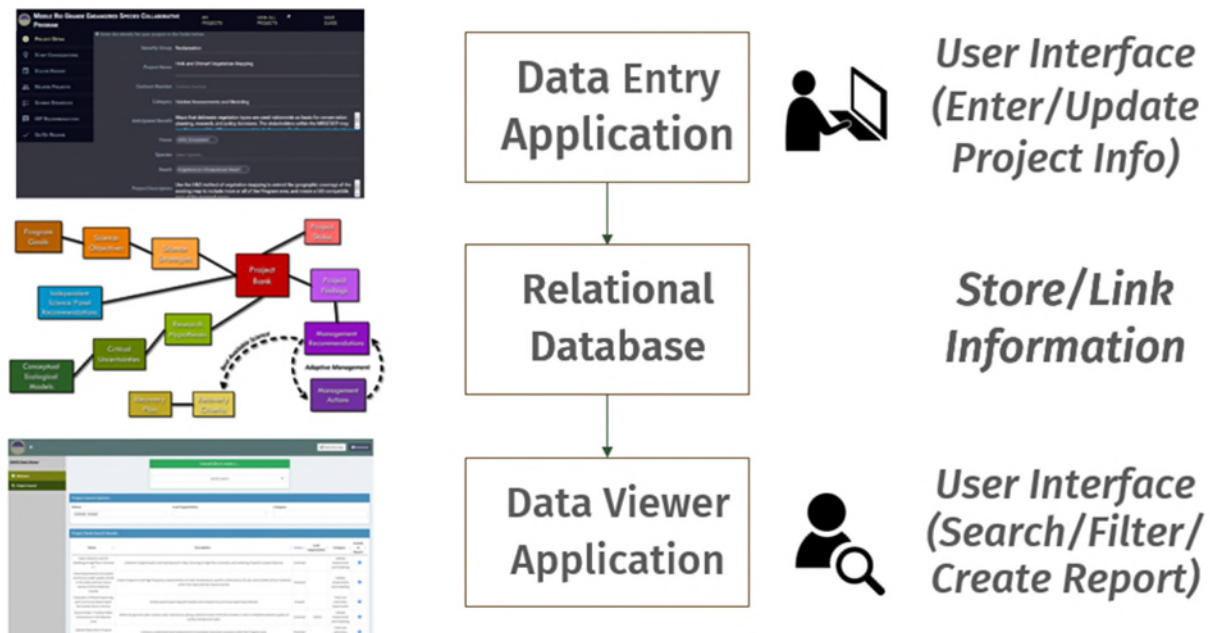


Figure 1. Components of the SAMIS.

1.3 Maintenance

The Program Support Team (PST), along with the SAMIS Development Team, maintain the relational database as well as the Data Entry and Data Viewer Apps that make up the SAMIS. They work together with Collaborative Program signatories and other users to keep the

information in the relational database current and accurate, and to provide technical assistance to individual users.

1.4 Hosting

The SAMIS relational database, firewall, and Data Entry Application (App) are all hosted via the Microsoft® Azure cloud. The Data Viewer App runs on a WEST-hosted RStudio® Shiny Server. Authentication and authorization (i.e., access management) are performed using Okta® software. Because the two user applications run on separate platforms, users will be asked to log into each one separately (using the same Okta username and password).

1.5 Security and Quality Assurance

Login access to the SAMIS is provided via a link from the Collaborative Program Portal (<https://webapps.usgs.gov/MRGESCP/>) under the Resources tab (<https://webapps.usgs.gov/MRGESCP/resources/samis>). Login credentials may be obtained from the PST by request at SAMIShelp@west-inc.com. Please provide the names, affiliation and contact information for all user requests.

In order to maintain the integrity of the information stored in the SAMIS database, access to edit project information using the Data Entry App is limited to those projects belonging to an organization's Security Group. A Security Group consists of one or more users with permission to add or update project details for an organization. An organization's Signatory representative designates members of a Security Group and indicates to the PST when changes to membership are needed.

When new project information is submitted by a user, the PST will review it and follow up with the user to verify details and linkages. Once an entry has been validated, it is released to the database and available for viewing by all users via the Data Viewer App.

1.6 Relational Database Structure

The relational database within the SAMIS stores and links project information to other Collaborative Program elements organized in a way that adds value through context. Figure 2 shows the hub and spoke framework of the SAMIS centered on the Project Bank. The boxes to the left of the Project Bank indicate the science pathways, with orange boxes representing strategic planning, blue boxes for addressing panel recommendations, and green boxes for reducing critical uncertainties from the conceptual ecological models (CEMs) via research. To the right of the Project Bank are purple boxes representing the pathway for tracking findings, recommendations, and opportunities for adaptive management.

Science & Adaptive Management Information System

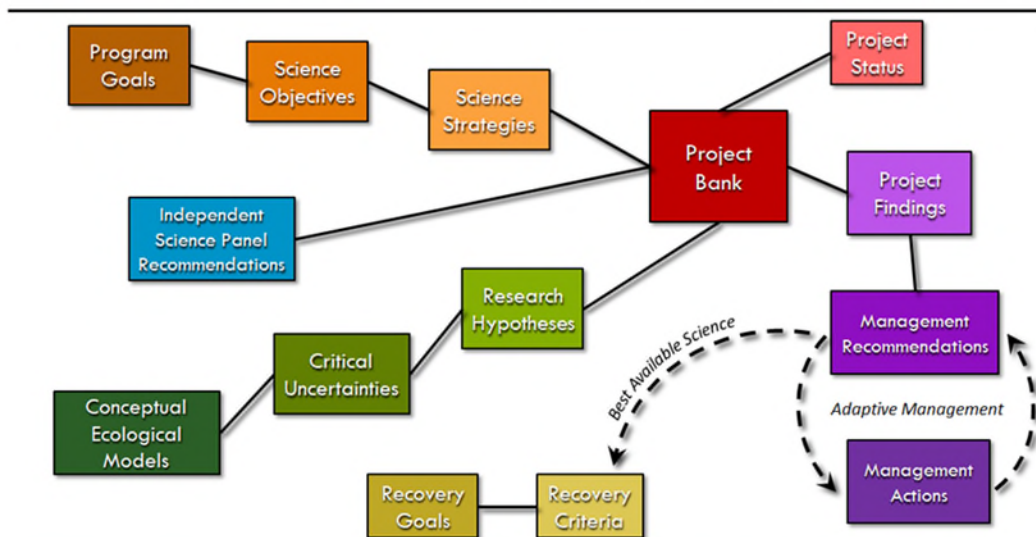


Figure 2. Pathways in the SAMIS.

By examining the linkages to the different pathways, we can assess a proposed project's ability to address our science strategies (orange), panel recommendations (blue), and/or critical uncertainties (green). This provides a metric for the project's scientific value to the Collaborative Program, which is useful for updating the Long-Term Plan for Science and Adaptive Management.

Findings and recommendations from technical reports, journal articles, and ad hoc group deliverables will populate the management pathway (purple). Tracking the application of findings and recommendations helps to document management decision support. During the Collaborative Program Annual Evaluation, this step acknowledges our support of adaptive management and can inform the choice of planning objectives for the next year.

By summarizing the various activities that helped to meet objectives, reduce critical uncertainties, improve ecological models, address existing recommendations, and formulate new recommendations, SAMIS outputs also demonstrate the benefits of participating in the Collaborative Program. Adding this context of the science program to the annual reports will help to justify continued support by highlighting how the Collaborative Program informs adaptive management.

1.7 User Involvement

The SAMIS itself is adaptively managed through consistent use, maintenance of the information it contains, and constructive feedback from the end users. As long as the contents are kept up-to-date and the functions are regularly tested, the system will perform as intended and produce beneficial outputs. With frequent and consistent use, the tools within the SAMIS will improve and increase in value to the Collaborative Program over time.

2.0 SAMIS USER LOG-INS

2.1 Obtaining a Username and Password for Log-In

To gain access to the Science and Adaptive Management Information System, contact the PST at SAMIShelp@west-inc.com.

Use this link to log in to the SAMIS Data Entry App:
<https://samis.west-inc.com/middleriogrande/login>

A link to the SAMIS Data Viewer App is available on the Navigation Bar of the Data Entry App when you click View All Projects. The Data Viewer App runs on a separate platform, so you will need to log in again using the same credentials. You can also use this link to log in to the SAMIS Data Viewer App:
<https://connect.west-inc.com/SAMISDataViewer/>

The SAMIS apps can also be opened from the Portal (<https://webapps.usgs.gov/MRGESCP/>) under the **Resources** tab (Figure 3).

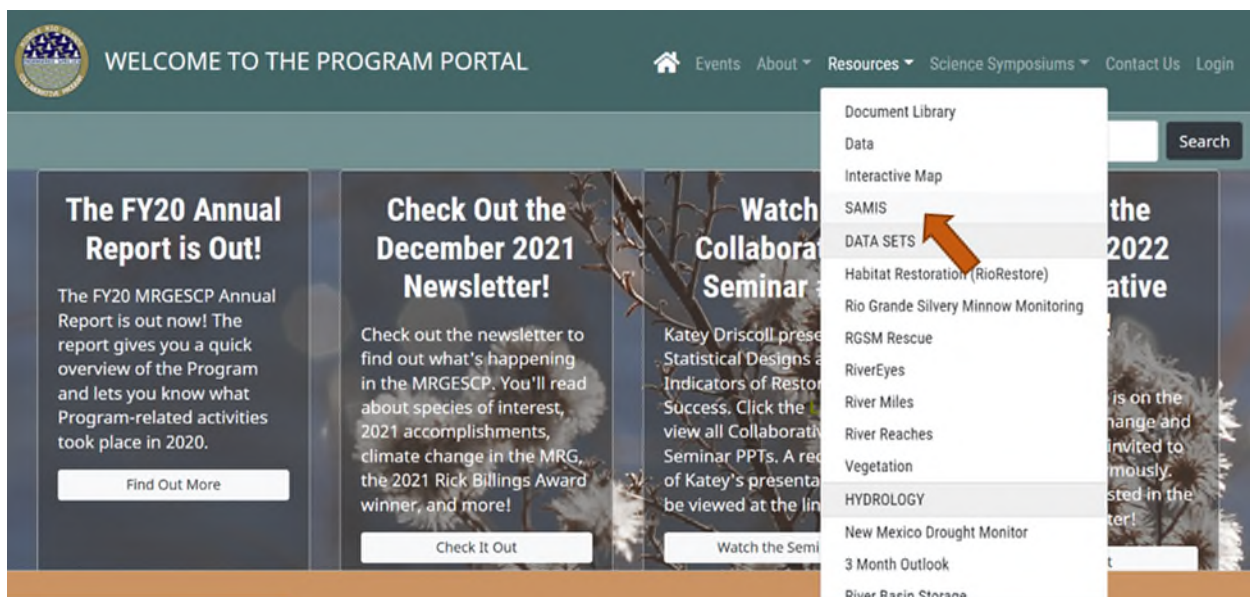


Figure 3. SAMIS tab on the Program Portal.

Enter your username and password to access the Home Page of the SAMIS Data Entry App (Figure 4).

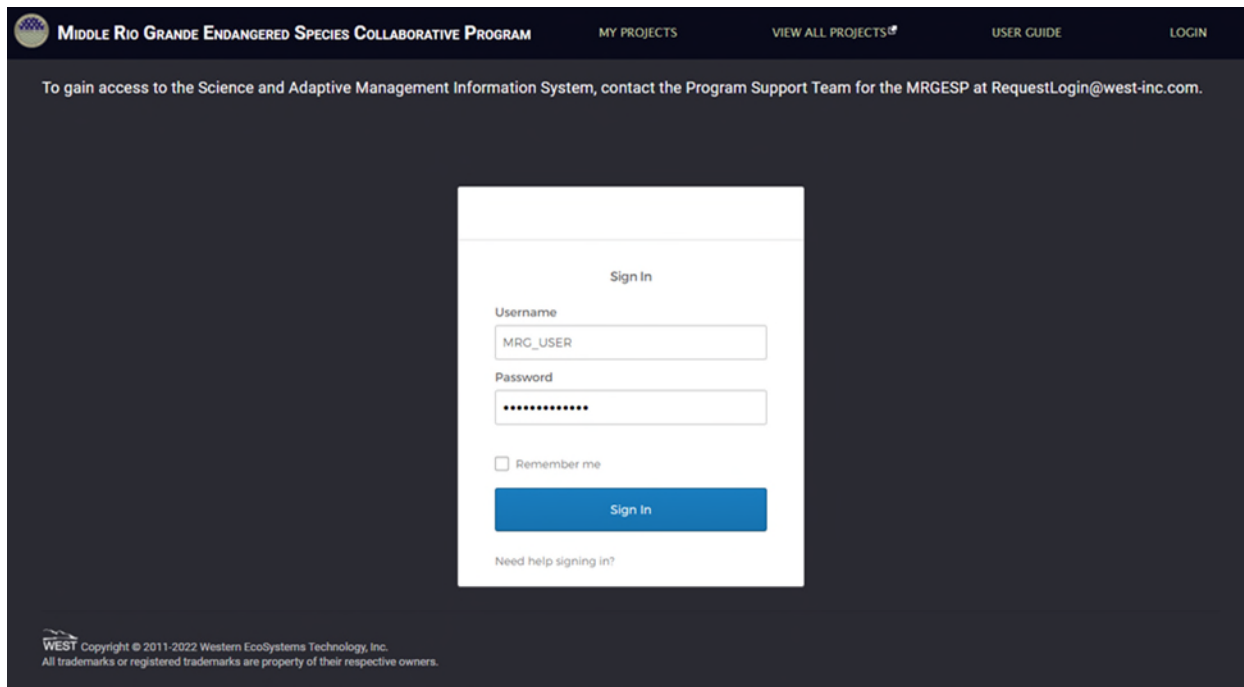


Figure 4. Sign in for the SAMIS Data Entry App.

You will also need to enter your username and password to access the Home Page of the SAMIS Data Viewer App (Figure 5).

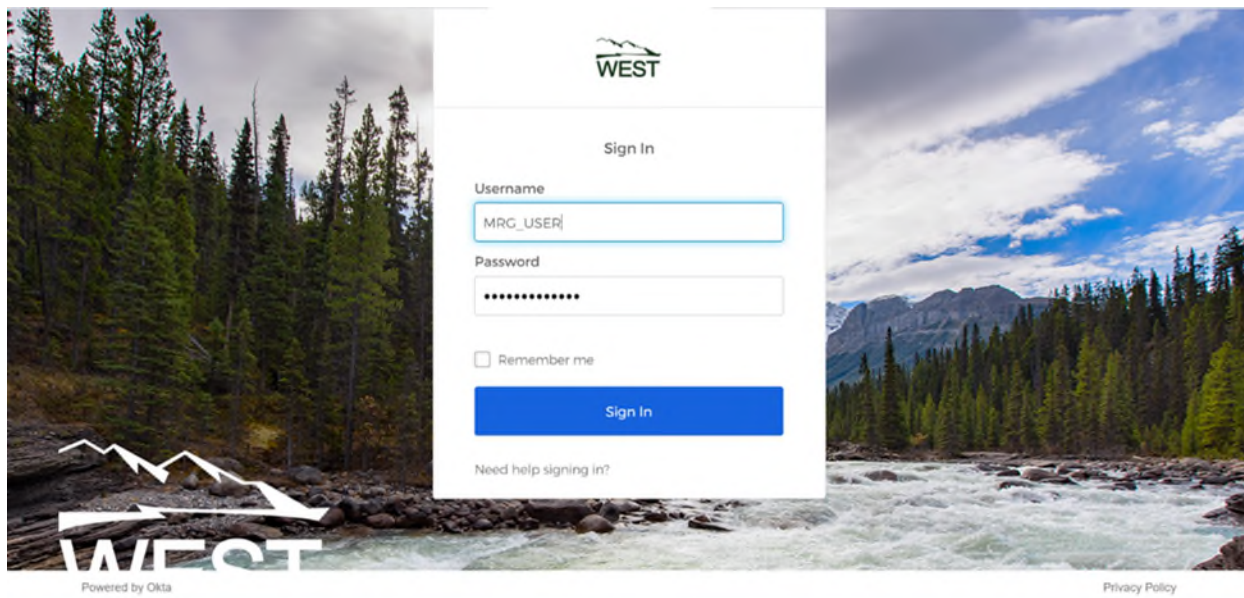


Figure 5. Sign in for the SAMIS Data Viewer App.

3.0 GETTING STARTED

3.1 Which SAMIS App Do You Need?

Table 1. Which SAMIS app do you need?

If you want to...	Use the...
Enter details about a project	Data Entry App
Update the status of a project	Data Entry App
Sort, filter, and generate a list of projects	Data Viewer App
Generate a quick summary of projects	Data Viewer App

3.2 SAMIS Data Entry App Home Page

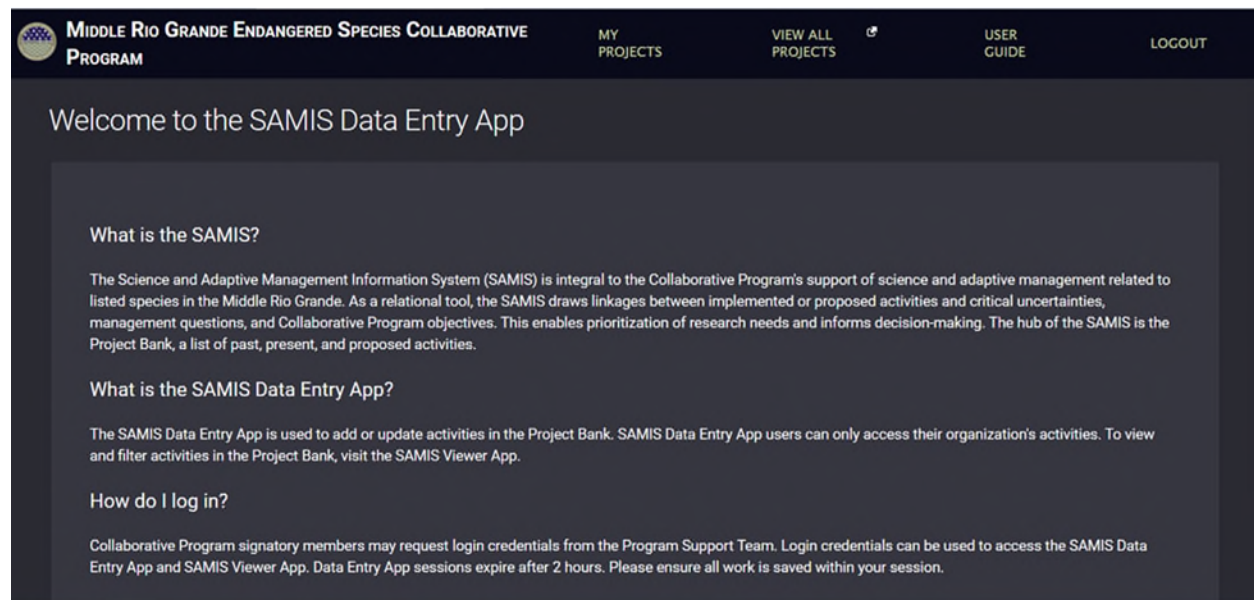


Figure 6. Home page for the SAMIS Data Entry App.

The SAMIS Data Entry App Home Page (Figure 6) answers common questions about the app. The Navigation Bar is available to the top of the page.

3.2.1 Navigation Bar

On the Navigation Bar (Figure 7), click **My Projects** to modify project details and status in the **Data Entry App**. You can also jump to the **Data Viewer App** by clicking **View All Projects**.



Figure 7. Navigation bar in the SAMIS Data Entry App.


3.3 Using the SAMIS Data Entry App

Data Entry App sessions expire after a period of inactivity. Please ensure all work is saved within your session.

3.3.1 Content Protections

Data Entry App users can access only their organization's activities. Once you submit project details in the SAMIS, a PST member will check that the entry is complete and may contact you for more information. During this time, the project will not appear in any searches within the SAMIS. After validation, the data manager will Quality Assurance/Quality Control (QA/QC) “release” the project to the database, where it can be accessed from the Data Viewer App and viewed by other users. QA/QC review and validation will begin as soon as possible, but if you need one or more entries released immediately, please contact the PST by phone for expedited review.

3.3.2 Searching and Selecting Projects

At the Navigation Bar, click on **My Projects**. This page lists all projects in your Security Group. You can control the number of items listed by clicking on **5**, **10** or **20** at the bottom left corner of the page. You can also jump to later items using the page numbers at the bottom right corner. If you know a keyword in the project title, you can use the  **Search** bar at the top right side of the table to filter the list. Figure 8 shows the project list generated by searching for the keyword “habitat.”

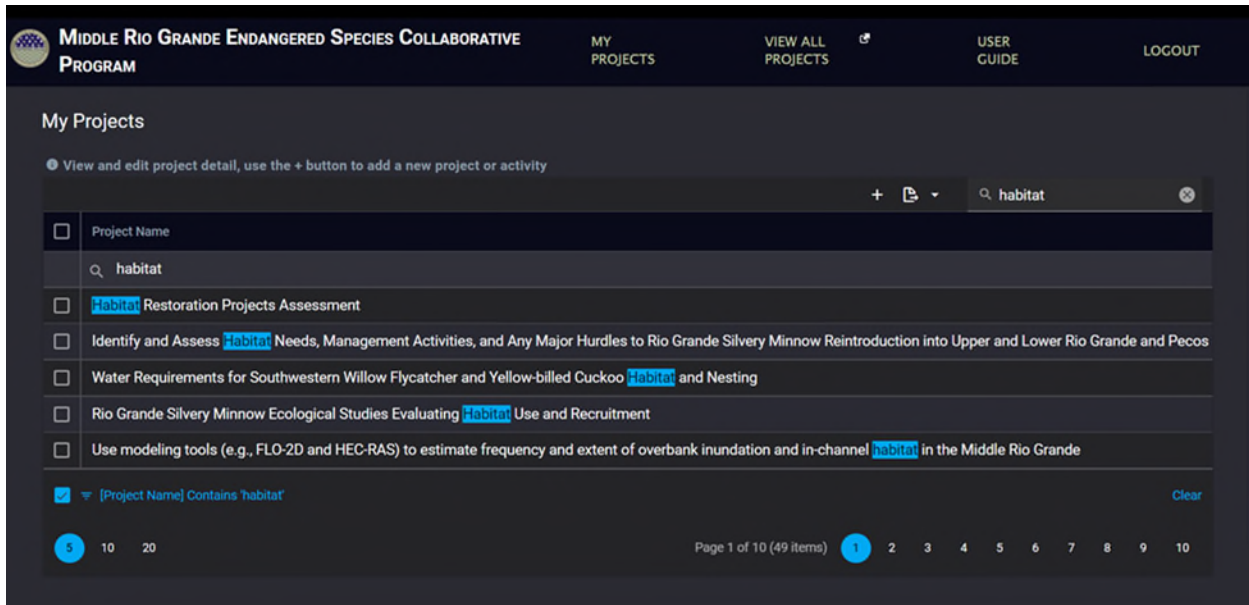



Figure 8. Project list by keyword on the SAMIS Data Entry App.

Select an item by clicking the checkbox in the far left column (Figure 9). You can select multiple items individually or you can select all items in the list by clicking the checkbox at the top of the column. You can export rows from the My Projects table to a spreadsheet file by selecting the desired items and clicking the Export icon  (Figure 9).

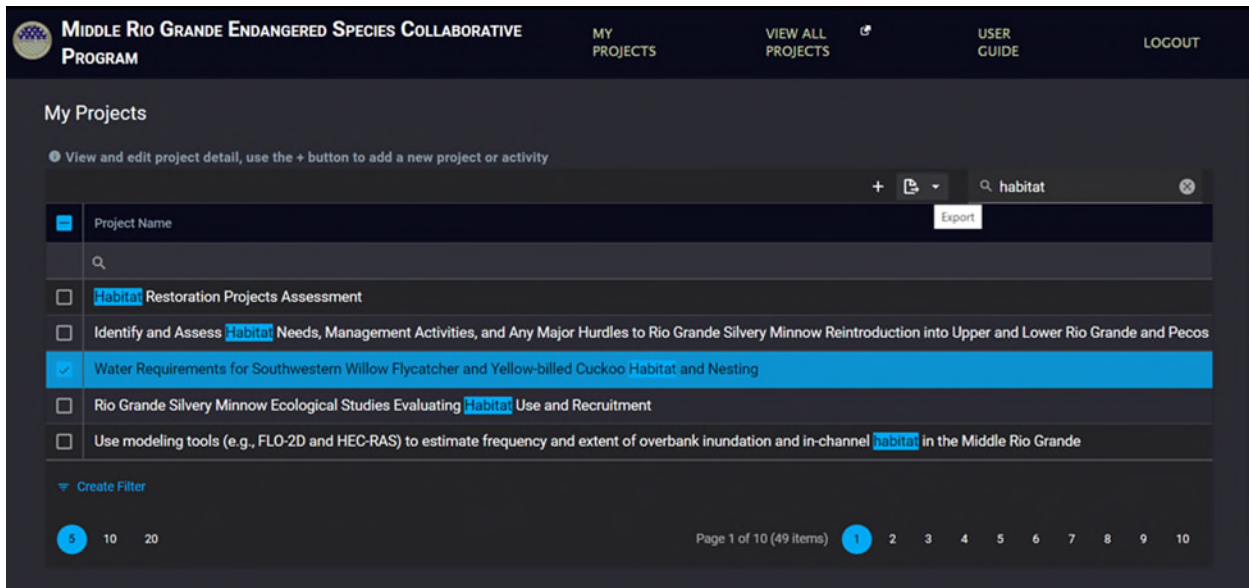


Figure 9. Selected project and Export option on the SAMIS Data Entry App.

You can review existing project details by clicking **View/Edit** for a project row (Figure 10).

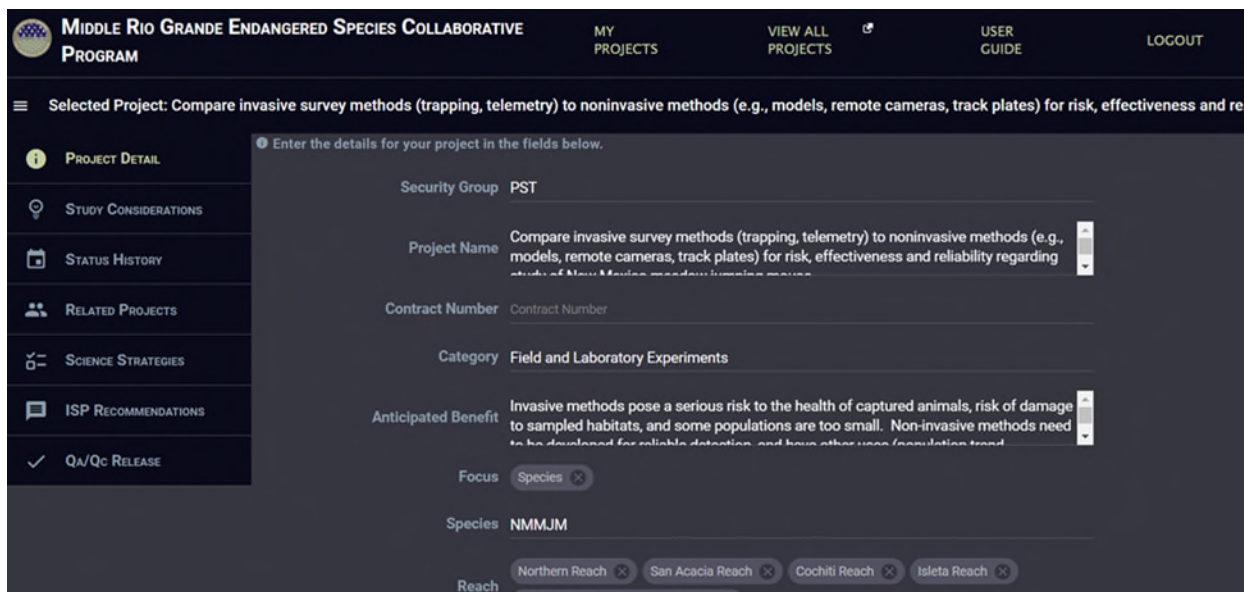


Figure 10. Project details page on the SAMIS Data Entry App.

Use the + button to add a new project. This opens a blank form with fields for basic project details (Figure 11).

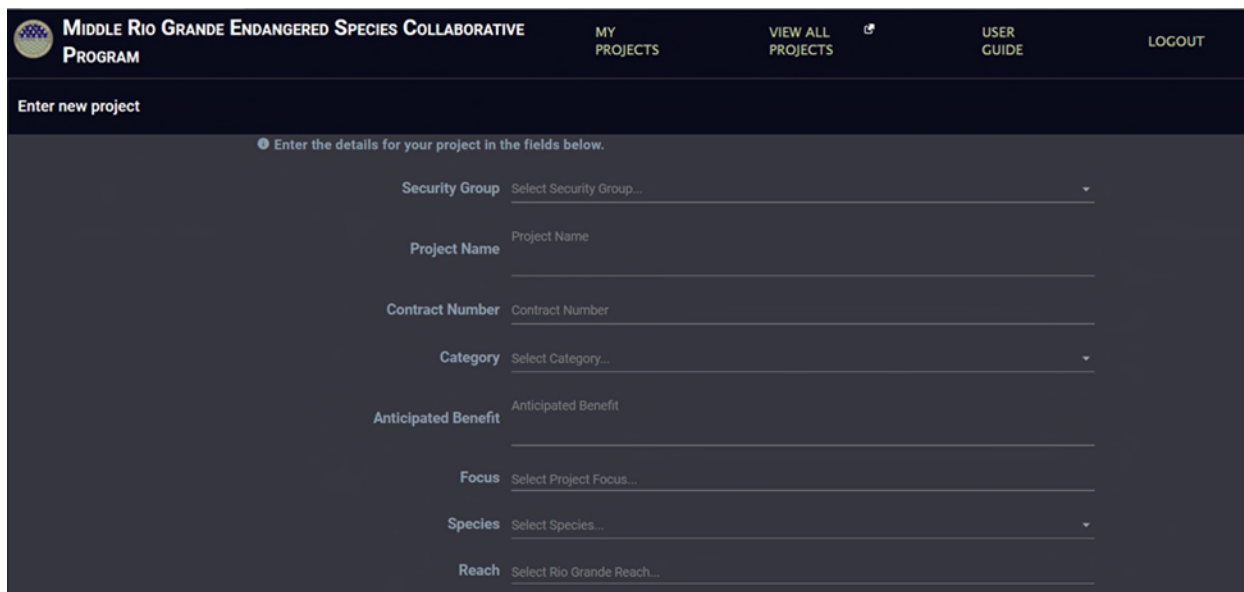


Figure 11. New project page on the SAMIS Data Entry App.

3.3.3 Entering Project Details

In the Project Detail window, use the pulldown menus to select a response or type the information into the space provided for each field. **To optimize the functionality of the SAMIS, please complete as many fields as possible.** If you would like to enter additional information, for which no field is provided, please type it into the **Notes** space at the bottom of the page. Descriptions for fields in the Project Detail window are given in Table 2.

Table 2. Fields in the Project Detail Window of the SAMIS Data Entry App.

Project Detail Field	Definition
Security Group	A Security Group is one or more users with permission to add or update project details for an organization
Project Name	Descriptive title for the project (To facilitate keyword searches, please avoid the use of acronyms)
Contract Number	Providing a contract number helps to distinguish projects with similar names or multiple phases (Optional)
Category	Select one of the five project categories for signatory contributions to MRGESCP
Anticipated Benefit	Briefly describe the benefit(s) expected as a result of the project
Focus	Select one or more project focus areas (Species, Ecosystem, Other, None)
Species	Select one or more target species (RGSM, SWFL, YBCU, PESU, NMMJM, Other)
Reach	Select one or more target river reaches from the list provided
Project Description	Brief description of the project (Please provide enough detail to help link project to strategies/recommendations/etc.)
Planning Year	The calendar year used for project planning and coordination purposes (Optional)
Start Date	Date (M/D/YYYY) on which the project or contract will begin
End Date	Date (M/D/YYYY) on which the project or contract will end
Point of Contact	Select from the list one or more contacts who can provide additional details about the project, if needed
Planning Linkage	Select from the list provided one or more planning documents to which the project relates (Optional)
Lead Organization	Select from the list provided one organization that will lead the project effort
Contributing Organizations	Select from the list provided one or more partners or organizations contributing to the project effort
Project Source	The origin of a project idea, such as an ad hoc group, individual, signatory request, uncertainty, etc. (Optional)
Notes	Additional information you would like to include for which no field is provided

IMPORTANT: When you have finished entering the project details, click the **Save** button at the bottom of the page to create a record in the Project Bank.

3.3.4 Adding Points of Contact

To get additional individuals added to the point of contact list, please contact the PST by request at SAMIShelp@west-inc.com.

3.3.5 Adding Study Considerations

For research projects, Study Considerations include details about the research question, methodologies, response and explanatory variables, and analyses. These details are required only for studies with research hypotheses that address uncertainties. Project linkages to uncertainties from the conceptual ecological models must be reviewed through the Science and Adaptive Management Committee.

3.3.6 Adding or Updating Project Status

The **Status History** window (Figure 12) stores a record of every status update for a project, along with the date and user's name.

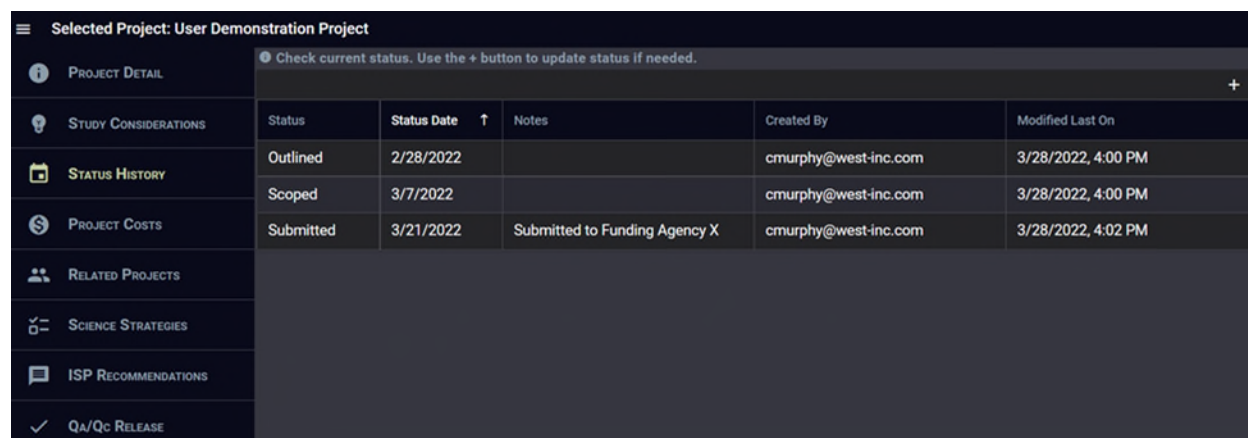


Figure 12. Status history entry page on the SAMIS Data Entry App.

Determination of a project's status is very important for the planning and tracking functions in the SAMIS. Status should be updated throughout the life of the project, according to seven stages in Table 3:

Table 3. Project stages in the SAMIS Data Entry App.

Stage	Project Status	Definition
1	Outlined	Proposed project idea has been outlined, but lacks details needed for a scope of work
2	Scoped	Scope of work has been developed, which includes research question/objective, study design, budget, timeline, etc.
3	Submitted	Project scope of work has been submitted to a potential funding agency
4	Approved	Funding agency has agreed to fund the project, but work has not commenced
5	In-progress	Project work is underway
6	Completed	Project work is complete and deliverables are in-progress
7	Finalized	Project deliverable(s) and final report have been released and findings shared with the Collaborative Program

3.3.7 Adding or Updating Project Cost

The Project Cost window (Figure 13) stores a record of each cost type update for a project, along with the amount, start and end dates, and optional notes. The checkbox toggle allows the user to indicate whether a project is cost-shared.

Cost Share	Cost Type	Amount (USD)	Start Date	End Date	Notes
<input type="checkbox"/>	Initial cost estim...	\$200,000.00	10/1/2022	9/30/2023	
<input checked="" type="checkbox"/>	Final cost estimate	\$225,500.00	10/1/2022	9/30/2023	65/35 Fed/Non cost share
<input checked="" type="checkbox"/>	Actual cost	\$225,479.58	10/1/2022	9/30/2023	65/35 Fed/Non cost share

Figure 13. Project cost entry page on the SAMIS Data Entry App.

The amount and cost type should be updated as actual costs become known. Each of the three types corresponds to one or more stages of a project's status.

Table 4. Cost types in the SAMIS Data Entry App.

Cost Type	Definition
Initial cost estimate	A rough estimate of total cost used to scope a project (<i>Corresponds to Outlined or Scoped project status</i>)
Final cost estimate	An estimate of total cost used to secure funding for a project (<i>Corresponds to Submitted, Approved, or In-progress project status</i>)
Actual cost	The total cost actually incurred in accomplishing work performed for a project (<i>Corresponds to Completed or Finalized project status</i>)

3.3.8 Adding Project Linkages

After completing the basic descriptive information in the Project Detail, Status History and Project Cost forms, you can propose linkages between your project and Related Projects, Science Strategies, and Independent Science Panel (ISP) Recommendations. Click on each of the tabs to select one or more linkages.

A **Related Project** is any project already in the Project Bank that is associated with the selected project. Click on the **Related Projects** tab to your added project to others in the SAMIS (Figure 14).

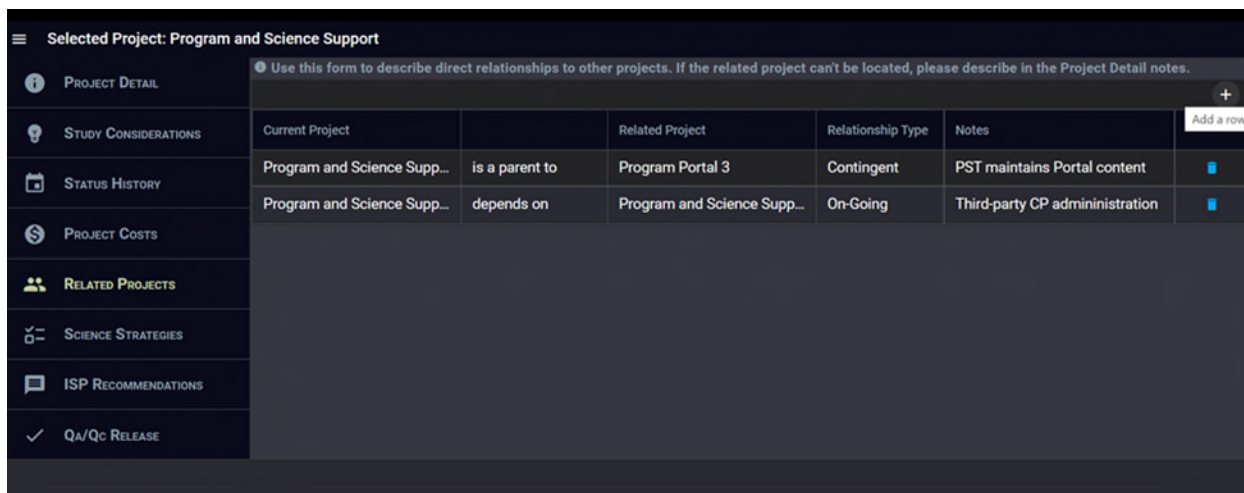


Figure 14. Related projects entry page on the SAMIS Data Entry App.

The SAMIS focuses primarily on directional relationships between two projects, wherein a dependency exists between the outcome of the first project (i.e., the parent) and the onset of the next project (i.e., the child). Three types of directional parent-child relationships are defined in Table 5:

Table 5. Project relationships in the SAMIS Data Entry App.

Cost Type	Definition
On-going	The dependent project is a continuation of the parent project (e.g., maintenance or monitoring efforts)
Sequential	The dependent project is a subsequent year of the same study as the parent project (e.g., next in a series)
Contingent	The dependent project relies on findings, methods or data collected in the parent project to move forward

Click on the **Science Strategies** tab to view, sort and filter (using keyword searches) the lists of currently available statements for linking to the project (Figure 15). You can filter and sort by Program Goal, Objective, Species and Strategy. Hover the pointer over a statement to view it in full.

PROJECT DETAIL	↓ 1	Strategy Name ↑ 2	Strategy Statement	Strategy Species	Science Objective	Program Goal	
STUDY CONSIDERATIONS	(All)	q F-	q	q	q	q	
STATUS HISTORY	+	<input checked="" type="checkbox"/>	Science_Strategy F-1b	Include other monitoring efforts of (l...	Other	Science_Objective_F-1	Program_Goal_F
PROJECT COSTS	+	<input checked="" type="checkbox"/>	Science_Strategy F-1c	Compile a database of habitat and b...	Other	Science_Objective_F-1	Program_Goal_F
RELATED PROJECTS	+	<input type="checkbox"/>	Science_Strategy F-2a	Maintain and update Hink & Ohmart ...	Other	Science_Objective_F-2	Program_Goal_F
SCIENCE STRATEGIES	+	<input type="checkbox"/>	Science_Strategy F-1a	Review the biennial assessment fro...	Other	Science_Objective_F-1	Program_Goal_F
	+	<input type="checkbox"/>	Science_Strategy F-2b	Research the relationship of non-nat...	Other	Science_Objective_F-2	Program_Goal_F
	+	<input type="checkbox"/>	Science_Strategy F-2c	Research the relationship of non-nat...	Other	Science_Objective_F-2	Program_Goal_F
ISP RECOMMENDATIONS	+	<input type="checkbox"/>	Science_Strategy F-2d	Make management recommendatio...	Other	Science_Objective_F-2	Program_Goal_F
QA/QC RELEASE	<input checked="" type="checkbox"/>	[Strategy Name] Contains 'F-'	Make management recommendations to minimize and mitigate negative impacts from non-native species to the listed species in the MRG.				

Figure 15. Science strategies entry page on the SAMIS Data Entry App.

Similarly, click on the **ISP Recommendations** tab to view, sort and filter (using keyword searches) the lists of currently available statements for linking to the project (Figure 16). You can filter and sort by Independent Science Panel Name, Panel Focus, Type of Recommendation, and Recommendation Statement. Hover the pointer over a statement to view it in full.

PROJECT DETAIL	↓ 1	Recommendation Statement ↑ 2	Isp Recommendation ...	Panel Name	Panel Focus Name	
STUDY CONSIDERATIONS	(All)	q adaptive		q	q	
STATUS HISTORY	+	<input type="checkbox"/>	An adaptive management program may help to imp...	Adaptive Managemen...	Population Monitoring...	Population Monitoring
PROJECT COSTS	+	<input type="checkbox"/>	In addition to adaptive management, Collaborative ...	Project Management	Population Monitoring...	Population Monitoring
RELATED PROJECTS	+	<input type="checkbox"/>	Maximize the information gained from re-stocking ...	ReportingAnalytical	Genetics 2016	Genetics
SCIENCE STRATEGIES	+	<input type="checkbox"/>	The panel therefore re...	ReportingAnalytical	Genetics 2016	Genetics
	+	<input type="checkbox"/>	The Science Workgroup (led by the Program) and t...	ReportingAnalytical	Genetics 2016	Genetics
ISP RECOMMENDATIONS	+	<input type="checkbox"/>	To facilitate adaptive management, experimental st...	Analysis of New Data...	Genetics 2016	Genetics
QA/QC RELEASE	<input checked="" type="checkbox"/>	[Recommendation Statement] Contains 'adaptive'				Clear

Figure 16. ISP recommendations entry page on the SAMIS Data Entry App.

Before checking the box to link a Science Strategy or ISP Recommendation, you must first view the item by clicking the plus sign (+), which opens a window with details about the statement (Figure 17; Figure 18). Review the information and click the checkbox labeled **Selected** in this window and then click the **Save** button to create a link and return to the list.

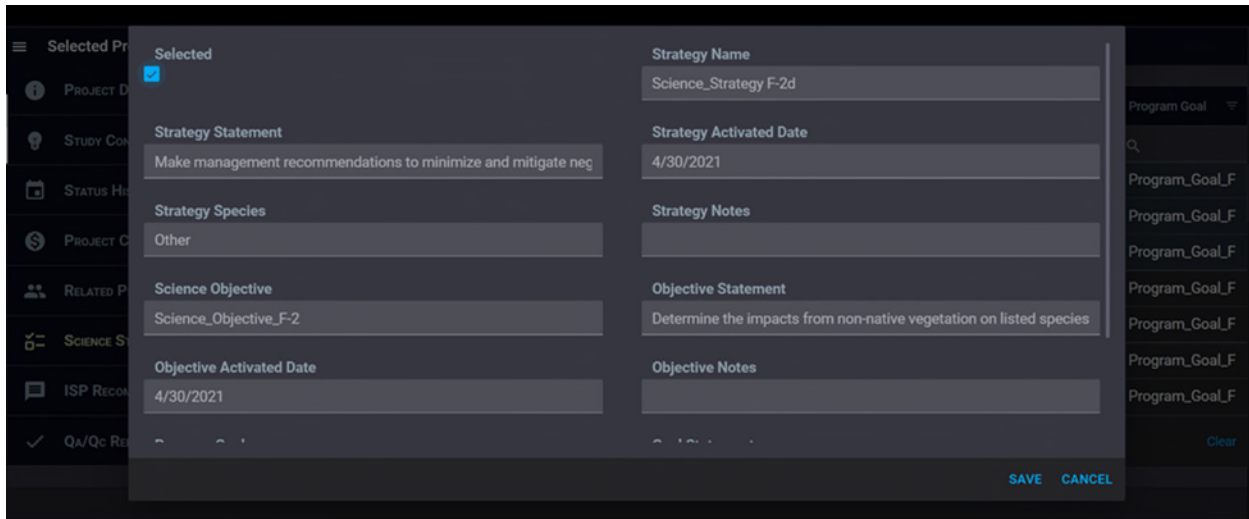


Figure 17. Science strategies entry pop-up on the SAMIS Data Entry App.

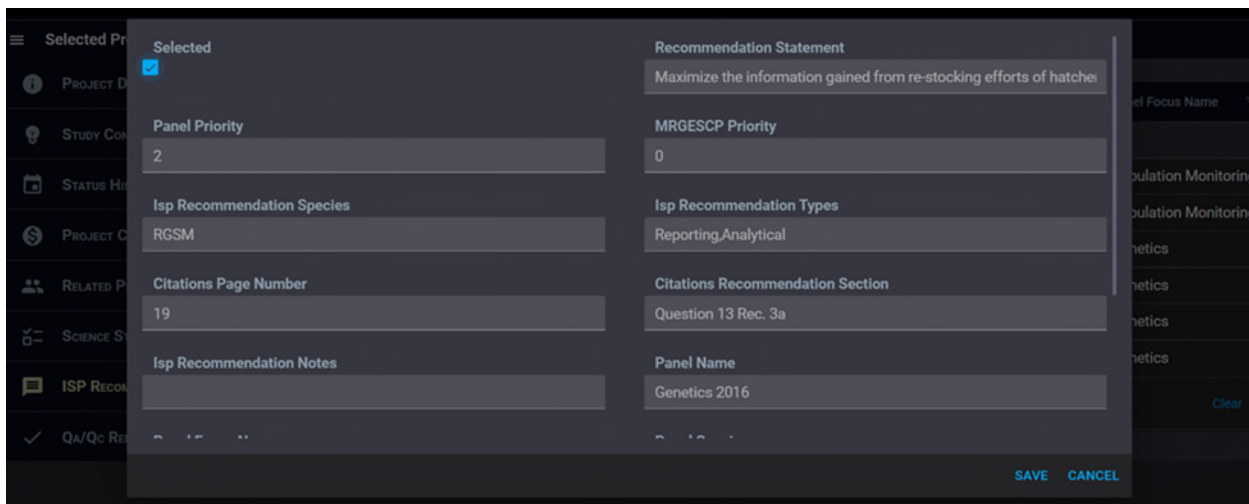


Figure 18. ISP recommendations entry pop-up on the SAMIS Data Entry App.

Time-Saving Tip: You can read each statement by hovering your mouse pointer over that cell in the table. However, reading each statement individually is time-consuming and can make comparing statements difficult (especially the longer ISP Recommendations). To expedite this process, you can review a list of the current statements (maintained in the appendices of the [Long-Term Plan for Science and Adaptive Management](#)) and choose potential linkages BEFORE logging into the SAMIS. You can also work directly with a PST member for help with appropriate linkages. Because of the potential for erroneous linkage selections, validation of proposed linkages is a step in the QA/QC Release process for each project entry.

3.4 SAMIS Data Viewer App Home Page

The SAMIS Data Viewer App runs on a separate platform and requires an additional log in with the same credentials. The SAMIS Data Viewer App Home Page (Figure 19) answers common questions about the app. Click the blue questions to view the answers to the questions. The Navigation Bar with the Project Search tab is available to the left of the page.

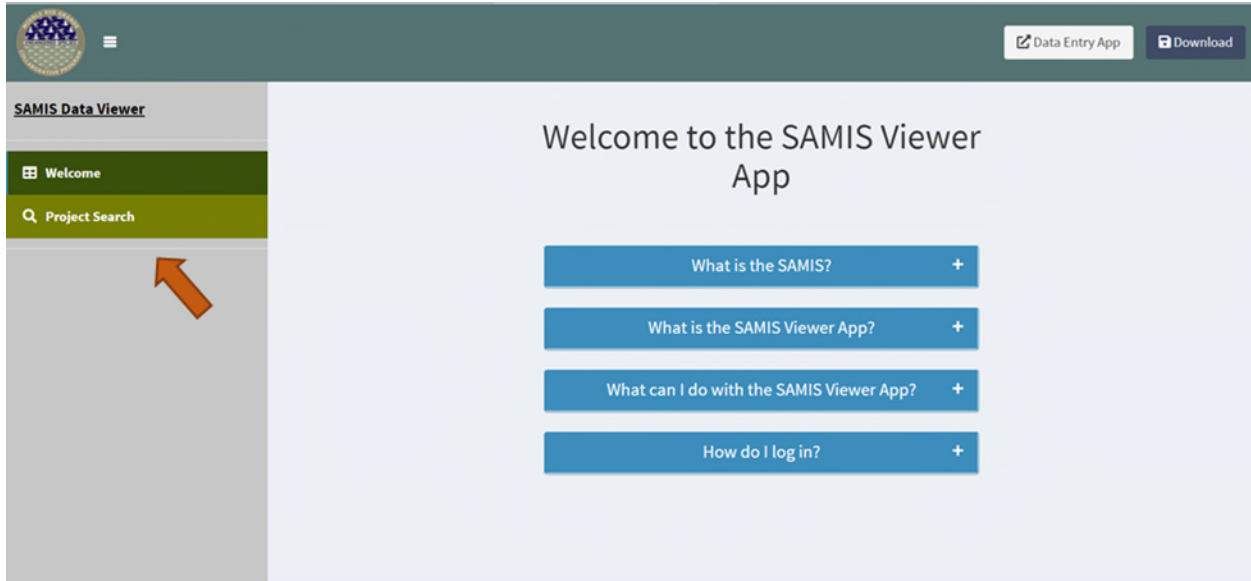


Figure 19. Home page for the SAMIS Data Viewer App.

3.5 Using the SAMIS Data Viewer App

3.5.1 Filtering the Project Bank

In the **Project Search** window (Figure 20), you can view and filter the Project Bank using desired criteria such as Project Status, Reach, Species, Focus, or Lead Organization. Search results can be exported to a spreadsheet (all fields exported as a .csv file) or a portable document file (pdf) summary.

Reminder: Only project entries that have been validated and QA/QC-released are accessible with the Data Viewer App. If you cannot find a recent entry and need to expedite the release, contact the PST directly by phone.

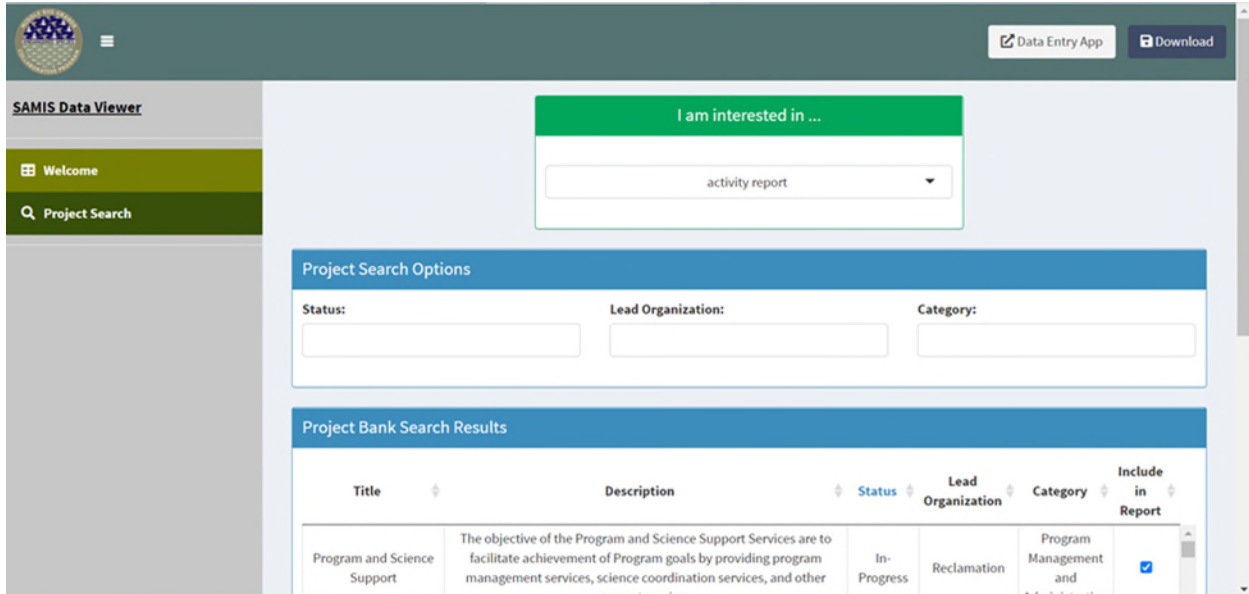


Figure 20. Project search page on the SAMIS Data Viewer App.

At the top of the page is a menu for the type of report you would like to generate, labeled “**I am interested in...**” (Figure 21). This menu currently contains preliminary (i.e., placeholder) reporting formats (i.e., activity report, impact report, planning report, “what can I fund?”, and custom search). Each of these reporting formats changes the primary search filters in the **Project Search Options** box.

As we learn more about the reporting needs of different users, we will update this menu to reflect the most frequently requested reporting formats.

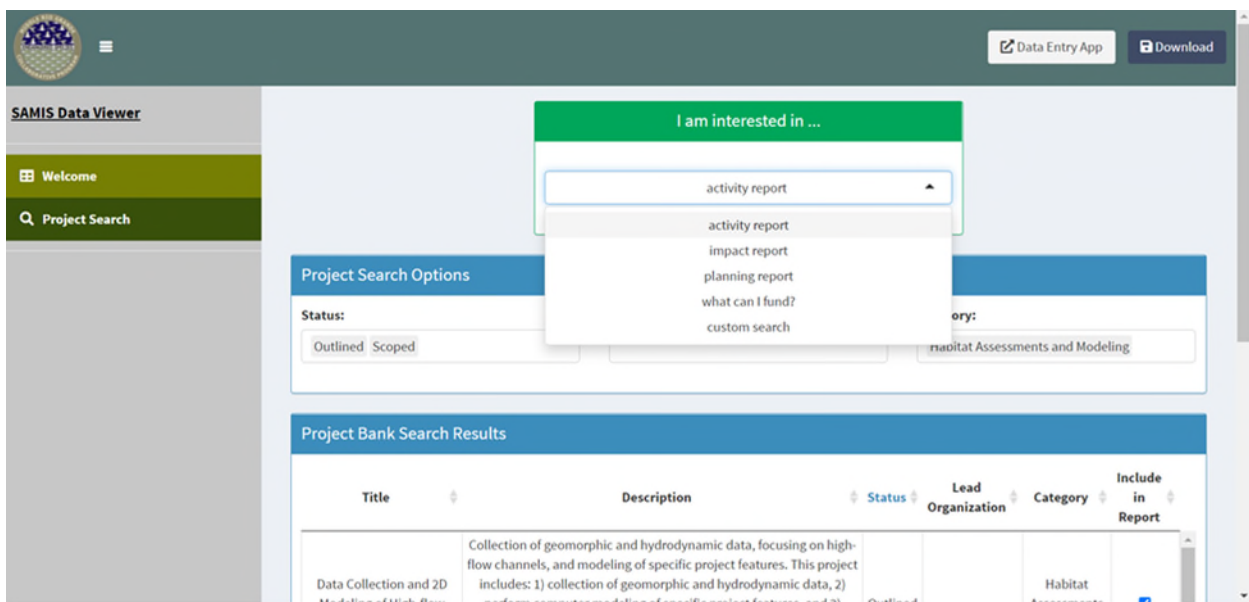


Figure 21. Report list on the SAMIS Data Viewer App.

Use the fields in the **Project Search Options** box to filter the Project Bank using pulldown menus and keywords, as needed. Figure 22 shows project bank results for a search of the title “Habitat” with focuses on SWFL and YBCU. In the **Project Bank Search Results** table, refine your list further by clicking the checkbox in the **Include in Report** column to deselect individual items (by default, all items in the search results are pre-selected).

The screenshot displays the 'Project Search Options' section with the following fields: Title (Habitat), Description (Keywords in Description), Focus (SWFL YBCU), Reach (empty), and Category (empty). Below this is the 'Project Bank Search Results' table.

Title	Description	Focus	Reach	Category	Lead Organization	Contributing Organization	Start Date	End Date	Include in Report
Evaluate Southwestern Willow Flycatcher Habitat Restoration	habitat, accommodating succession and evaluating the existing strategy, decision framework, and recommended timeframes.	SWFL	Reach;Cochiti Reach;Angostura (or Albuquerque) Reach;Isleta Reach;San Acacia Reach	Field and Laboratory Experiments					<input checked="" type="checkbox"/>
Implement the Strategy for Maintenance and Construction of Southwestern Willow	Implement the comprehensive flycatcher management plan for maintenance of existing flycatcher habitat and construction of new	SWFL	Northern Reach;Cochiti Reach;Angostura (or Albuquerque) Reach;Isleta Reach;San Acacia	Field and Laboratory Experiments					<input checked="" type="checkbox"/>

Figure 22. Project bank search results on the SAMIS Data Viewer App.

3.5.2 Creating a Report

When you are satisfied with your list of selected projects, scroll to the top of the page and click the **Download** button in the upper right corner (Figure 23).

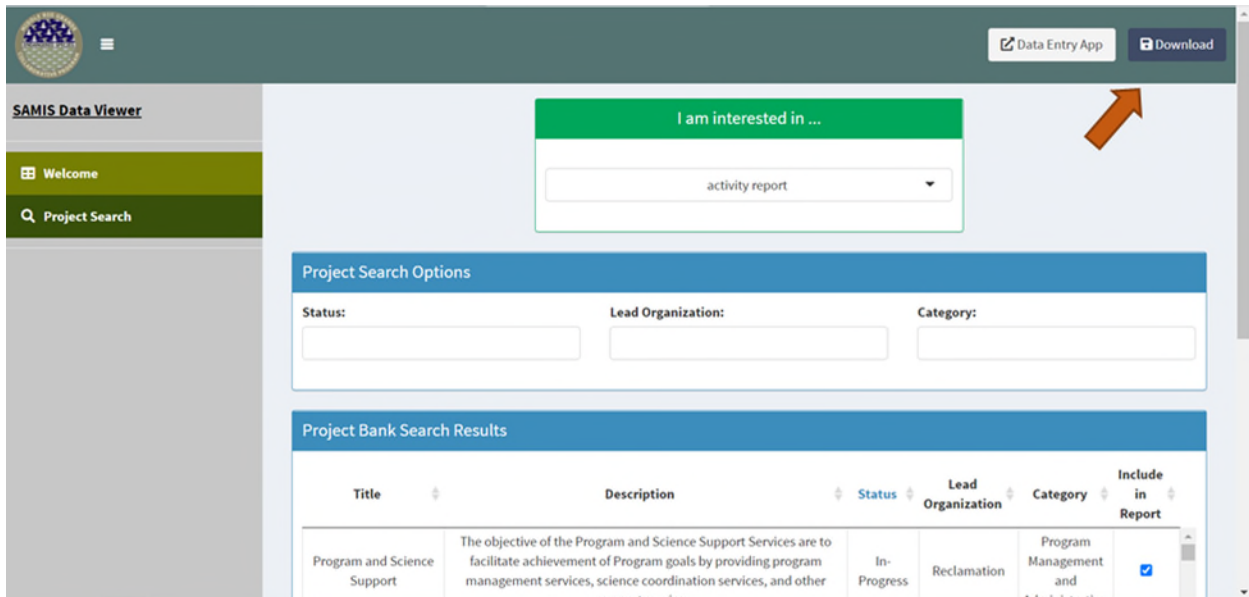


Figure 23. Download button on the SAMIS Data Viewer App.

A popup window (Figure 24) will appear asking if you would like a .csv file of the output in addition to an .html report pdf. If you would like to bring into a spreadsheet a copy of all of the available fields for your selected projects, select **Yes**. If you only want the pre-formatted, dynamic .html summary report, select **No**. Your output files will be written to a .zip file in your **Downloads** folder. The filename starts “projectReport_” followed by the date and time.

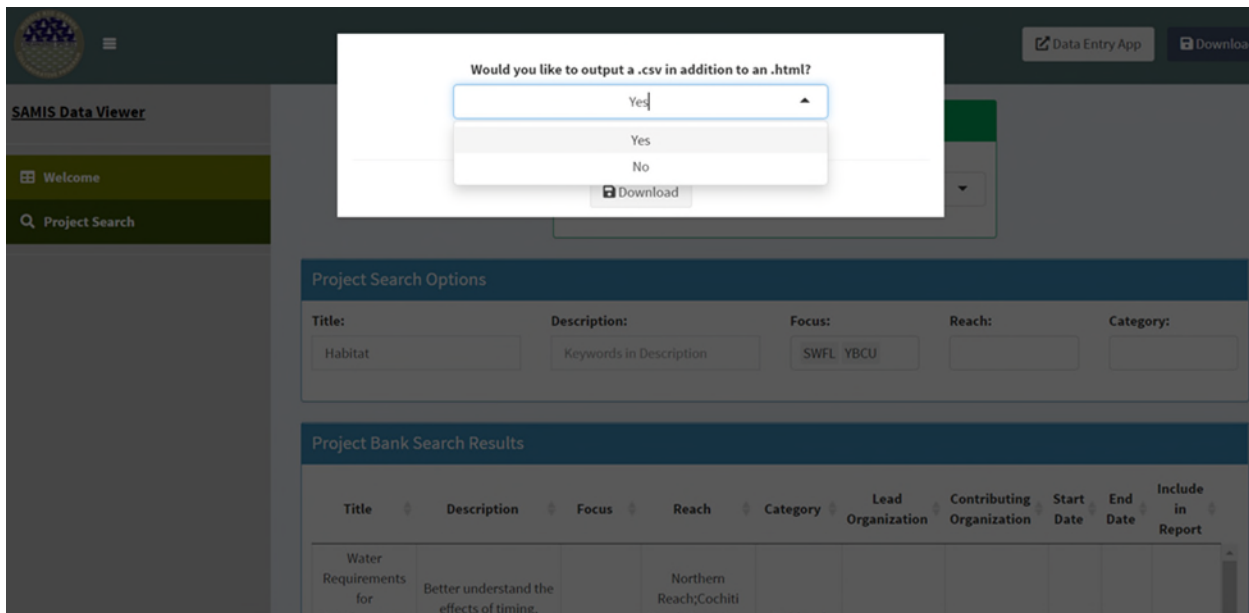


Figure 24. Output options for download on the SAMIS Data Viewer App.

3.5.3 Dynamic HTML Reports

We tried to anticipate the needs of the diverse community of users in the Collaborative Program while building the SAMIS and will continue to develop and refine the reporting tool as we incorporate feedback from users. The various reporting options from the “I am interested in...” menu on the **Project Search** page generate different pre-formatted, dynamic .html report content. With user guidance, the PST and SAMIS Development Team will modify and customize these report formats to include the specific tables, graphics and summaries requested for use in presentations, fact sheets, and briefings. Figures 25-27 show custom report formats available on the Data Viewer App.

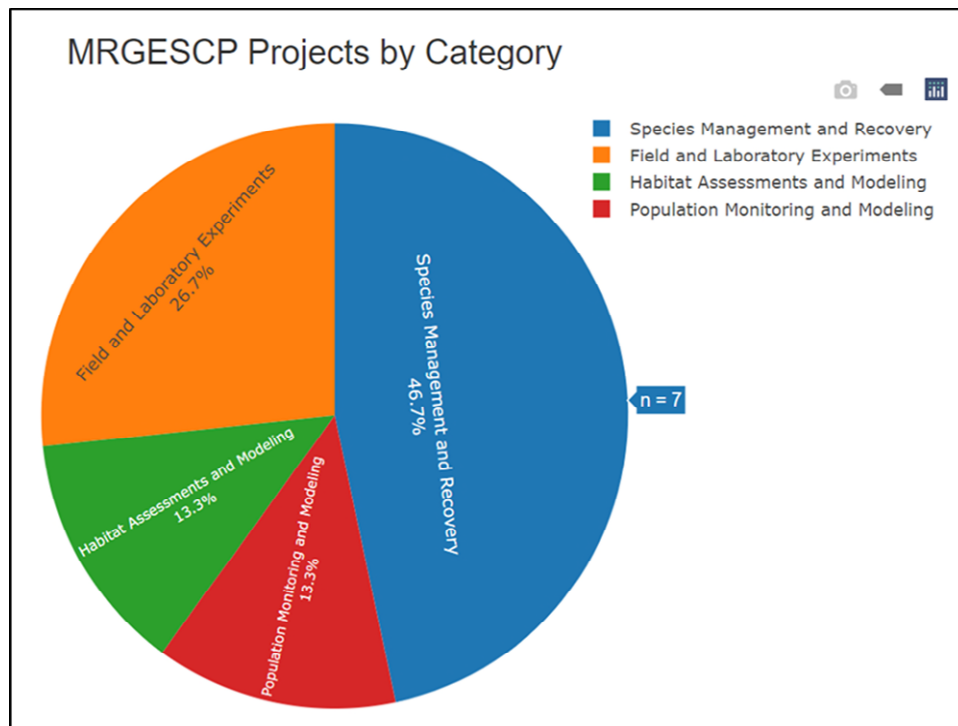


Figure 25. Projects by category report on the SAMIS Data Viewer App.

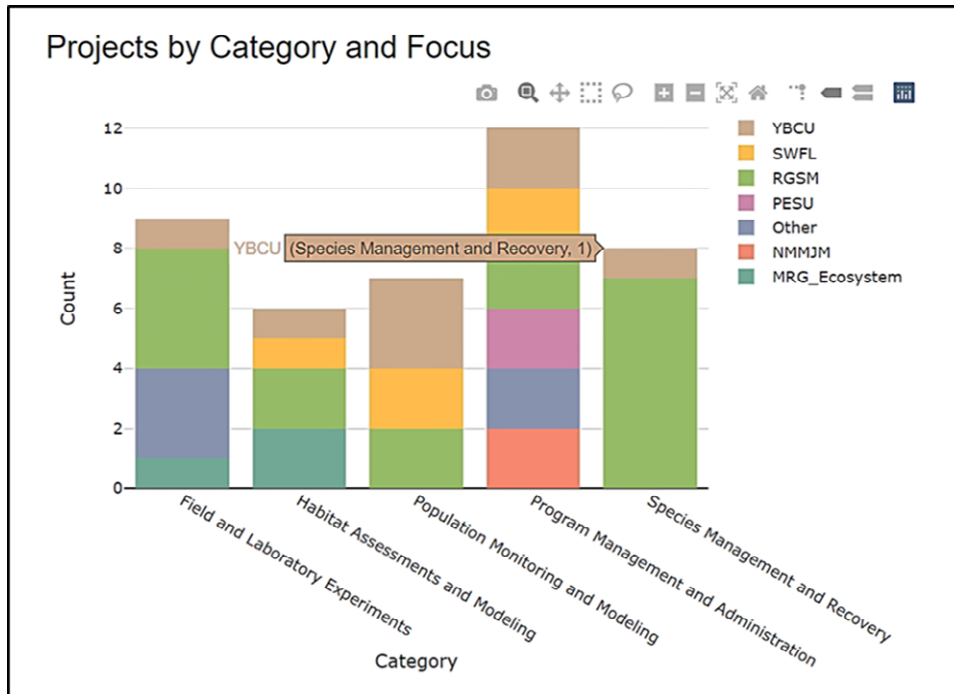


Figure 26. Projects by category and focus report on the SAMIS Data Viewer App.

The following search options returned 9 projects

Search Option	Selected Options
ProjectName	Habitat
ProjectDescription	None
Focus	SWFL; YBCU
Reach	None
ProjectCategoryType	None

Showing 1 to 5 of 5 entries

Search Results Summary

Show entries

Search:

ProjectID	Title	Focus	Reach	Activity Category	Lead Agency	Status
28	Water Requirements for Southwestern Willow Flycatcher and Yellow-billed Cuckoo Habitat and Nesting	SWFL;YBCU	Northern Reach;Cochiti Reach;Angostura (or Albuquerque) Reach;Isleta Reach;San Acacia Reach	Field and Laboratory Experiments		Outlined
30	Use modeling tools (e.g., FLO-2D and	RGSM;SWFL	Northern Reach;Cochiti	Field and		Outlined

Figure 27. Search results report on the SAMIS Data Viewer App.

3.5.4 .CSV Output

If you selected the supplemental comma separated values (.csv) output, your .zip file will also contain this file. Opening the output in a spreadsheet will reveal all of the search fields and metadata for each selected project (i.e., project details, status, release date, linkages; Figure 28).

ProjectID	ProjectName	ProjectDescription	Anticipate StartDate	EndDate	ProjectStatus	ProjectCategory	ProjectSubcategory	ProjectSpecies	PrimaryAgency	Agency	PointOfContact	ContactEmail	Authority	Focus	ReleaseDate	
1	Program a	The objec	The PST h	2022-04-0	2023-03-3	In-Progre	Administr	Program M	Other	Reclamati	NA	NA	NA	NA	Other	N.
2	Program F	Establish	The Portal	NA	NA	In-Progre	Administr	Program M	Other	USACE	NA	NA	NA	NA	Other	N.
3	Data Colle	Collection	NA	NA	NA	Outlined	Hydrologi	Habitat As	NA	NA	NA	NA	NA	MRG_Ecos	Ni	
4	Assessing	Collectio	NA	NA	NA	Outlined	Water Qu	Habitat As	Other	NA	NA	Justin Rea	justin.k.re	NA	Other	Isl
5	Evaluator	Pilot	This proje	NA	NA	Scoped	Ecosystem	Field and	RGSM	NA	NA	NA	NA	RGSM	N.	
6	Managem	The brow	Reduce in	NA	NA	Finalized	Other	Populatio	SWFL	Other	NA	NA	NA	SWFL	N.	
7	Ground W	Define th	This will b	NA	NA	Outlined	Hydrologi	Habitat As	NA	USACE	NA	NA	NA	MRG_Ecos	Ni	
8	Habitat Re	Conduct a	This proje	NA	NA	Outlined	Habitat M	Field and	NA	NA	NA	NA	NA	MRG_Ecos	Ni	
9	PIT Taggin	Characteri	Characteri	NA	NA	In-Progre	Other	Populatio	RGSM	NA	NA	NA	NA	RGSM	Ni	

Figure 28. .CSV output report from the SAMIS Data Viewer App.

This raw form of the data can be used to generate custom summaries using tools like pivot tables and charts (example below). However, with feedback from users, searches and .html reports can be customized and saved for quick execution, which eliminates the extra steps in creating pivot tables and charts. Please contact the PST for help with your reporting needs.

Figures 29-30 are examples of pivot chart summaries of raw data generated by the Data Viewer output as a .csv file.

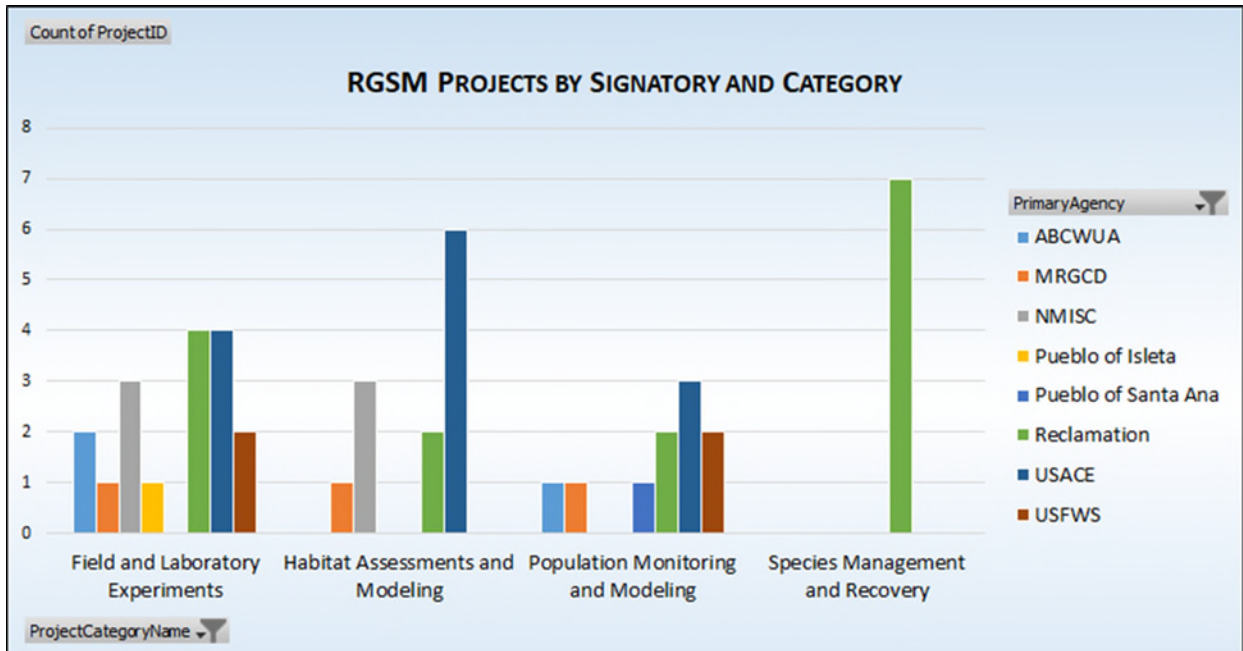


Figure 29. Pivot chart example from the SAMIS Data Viewer App.

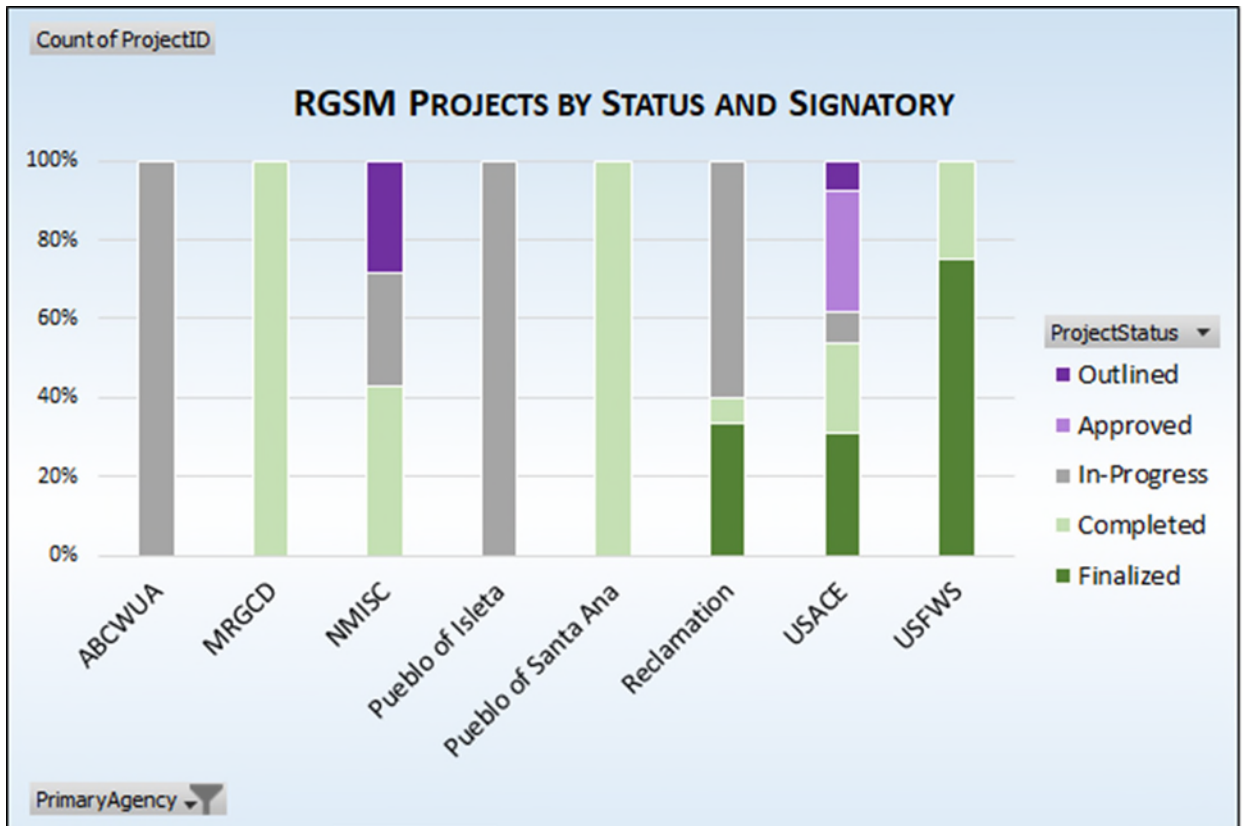


Figure 30. Pivot chart example from the SAMIS Data Viewer App.

4.0 FREQUENTLY ASKED QUESTIONS (FAQs)

How can users request changes or report bugs in SAMIS?

User feedback is essential to improving the functionality of the SAMIS. Users can request changes or report bugs in SAMIS by emailing the help desk (SAMIShelp@west-inc.com) with a detailed explanation of the request or issue. The PST reviews these emails daily and will reply as soon as possible to let you know the status of your inquiry. If a user needs immediate assistance with inputting their data or has questions related to their use of the SAMIS, questions can either be sent to the help desk email or you can call a PST Member.

How does the PST communicate changes in SAMIS to the Collaborative Program?

The PST communicates changes made to the SAMIS to the Collaborative Program in three ways:

1. Site Release Notes maintenance log on the Data Entry App home page;
2. Summary of substantial changes during regular updates to the EC and SAMC;
3. Announcements in the Collaborative Program newsletter.

Why do I have to log in again when switching between the Data Entry App and the Data Viewer App?

The Data Entry App and the Data Viewer App operate on different platforms, so each requires a separate login (but uses the same credentials).

How do I request training on how to use SAMIS?

Users can request training on how to use SAMIS by emailing the help desk (SAMIShelp@west-inc.com). The PST will reply promptly to discuss your training needs and to schedule your training. The PST can be reached Monday through Friday, from 9 a.m. to 5 p.m.

Which SAMIS application do I need to use?

Table 1 from Section 3.1. Which SAMIS app do you need?

If you want to...	Use the...
Enter details about a project	Data Entry App
Update the status of a project	Data Entry App
Sort, filter, and generate a list of projects	Data Viewer App
Generate a quick summary of projects	Data Viewer App

What information will I need before I enter a project?

Table 2 from Section 3.3. Fields in the Project Detail Window of the SAMIS Data Entry App.

Project Detail Field	Definition
Security Group	A Security Group is one or more users with permission to add or update project details for an organization
Project Name	Descriptive title for the project (To facilitate keyword searches, please avoid the use of acronyms)

Contract Number	Providing a contract number helps to distinguish projects with similar names or multiple phases (Optional)
Category	Select one of the five project categories for signatory contributions to MRGESCP
Anticipated Benefit	Briefly describe the benefit(s) expected as a result of the project
Focus	Select one or more project focus areas (Species, Ecosystem, Other, None)
Species	Select one or more target species (RGSM, SWFL, YBCU, PESU, NMMJM, Other)
Reach	Select one or more target river reaches from the list provided
Project Description	Brief description of the project (Please provide enough detail to help link project to strategies/recommendations/etc.)
Planning Year	The calendar year used for project planning and coordination purposes (Optional)
Start Date	Date (M/D/YYYY) on which the project or contract will begin
End Date	Date (M/D/YYYY) on which the project or contract will end
Point of Contact	Select from the list one or more contacts who can provide additional details about the project, if needed
Planning Linkage	Select from the list provided one or more planning documents to which the project relates (Optional)
Lead Organization	Select from the list provided one organization that will lead the project effort
Contributing Organizations	Select from the list provided one or more partners or organizations contributing to the project effort
Project Source	The origin of a project idea, such as an ad hoc group, individual, signatory request, uncertainty, etc. (Optional)
Notes	Additional information you would like to include for which no field is provided

Additional information to discuss with the PST during the QA/QC validation will include: any related projects, science strategy linkages, Independent Science Panel recommendations that the project addresses, and for research studies, details about the methods, data analyses and hypotheses.

What is the difference between “Completed” and “Finalized” project status?

“Completed” means that the work is completed, but deliverables and a final report have not been shared with the Collaborative Program. “Finalized” means that project deliverables and the final report have been released and findings have been shared with the Collaborative Program. Incorporation of findings is a critical step for learning in the adaptive management cycle.

Why can’t I edit details for a previously entered project?

Once a project entry has been QA/QC-released, the user can no longer edit the details. This protects the integrity of content in the Project Bank once it becomes accessible through the Data Viewer App. However, changes to project details can be requested through the PST at any time. If you need to update details for a project that has already been released, you can reach out via the help desk email (SAMIShelp@west-inc.com) or call the PST to get help with updating your entries.

Note: Updates to Status History and Project Cost information can be updated at any time by the user. This information remains open for editing after QA/QC release.

How long will the QA/QC release process take?

The QA/QC process does not have a set timeline, although it is started by the PST soon after the data is submitted by a user. QA/QC is dependent upon the accuracy and thoroughness of the content entered by the user. Factors that affect timing include the number and nature of linkages to a project, the scope and complexity of the project, your availability for follow-up with the PST. The PST will always work to QA/QC-release project entries in a timely manner and we anticipate that 1-2 weeks will be the most common timeline for the process. If you require your information to be QA/QC-released sooner, please contact the PST or use SAMIShelp@west-inc.com.

What happens if two people are editing the same project?

If two users are updating or editing the same data, the last user to save will overwrite the changes made by any other user. In short, "whoever saves last wins."

5.0 GLOSSARY (IN PROGRESS)

Category – The Collaborative Program designates five primary categories for organizing projects and crediting signatory contributions to science and adaptive management. *See also [Signatory Contribution Category Definitions](#) in Appendix.*

ISP Recommendations – Management actions, research studies, and other recommended activities provided to the Collaborative Program by experts on Independent Science Panels (ISPs).

Project – A project is defined as an item in the Project Bank that has been contributed by a Signatory or research partner, generated from a scientific uncertainty, or proposed within the Collaborative Program to address a science strategy or Independent Science Panel recommendation.

QA/QC Release – After information that has been submitted for a new project is validated by the Program Support Team, it is released to the database where it can be viewed by other users.

Related Project – Any project already in the Project Bank that is associated with the selected project. *See also [Project-to-Project Relationships](#) in Appendix.*

Science Strategies – A list of strategies developed by the Collaborative Program to address the Science Objectives.

Security Group – Users with permission to add or update project details for your organization.

Status History – A list of all updates to project status by date and user. *See also [Project Status Definitions](#) in Appendix.*

Study Considerations – For research projects, Study Considerations include details about the research question, methodologies, response and explanatory variables, and analyses.

6.0 APPENDIX

6.1 Signatory Contribution Category Definitions

Program Management and Administration – Non-research support of the Collaborative Program’s mission and goals through administrative assistance and aid in the funding, planning, coordination, and staffing of MRGESCP activities. Examples include the Program and Science Support contract, Program Portal, and public outreach initiatives.

Species Management and Recovery – Non-research activities with influence on or relevance to recovery of one or more listed species within the Middle Rio Grande. Examples include rescue operations, support of captive propagation facilities, and control of invasive species.

Population Monitoring and Modeling – Descriptive empirical and/or mathematical investigations of population data for one or more listed species within the Middle Rio Grande. Examples include estimation of population size and trends over time, estimation of vital rates, and population viability forecasts.

Habitat Assessments and Modeling – Descriptive empirical and/or mathematical investigations of physical environmental features at various spatial scales (e.g., site, reach, landscape) with influence on one or more listed species or the ecosystem of the Middle Rio Grande. Examples include hydrology and hydraulic (H&H) modeling, mapping and geographic information systems (GIS), geomorphologic studies, water quality and climate change studies.

Field and Laboratory Experiments – Any study designed to test a hypothesis about a listed species or other biotic response to a manipulation in a field or laboratory setting. Examples include habitat manipulations of flows or vegetation, before-after control-impact restoration designs, and laboratory studies of physiological responses.

6.2 Project Status Definitions

1. **Outlined:** Proposed project idea has been outlined, but lacks details needed for a scope of work.
2. **Scoped:** Scope of work has been developed, which includes research question/objective, study design, budget, timeline, etc.
3. **Submitted:** Project scope of work has been submitted to a potential funding agency.
4. **Approved:** Funding agency has agreed to fund the project, but work has not commenced.
5. **In-progress:** Project work is underway.
6. **Completed:** Project work is complete and deliverables are in-progress.
7. **Finalized:** Project deliverable(s) and final report have been released and findings shared with the Collaborative Program.

6.3 Project to Project Relationships

On-going - The dependent project is a continuation of the parent project (e.g., maintenance or monitoring efforts)

Sequential - The dependent project is a subsequent year of the same study as the parent project (e.g., next in a series)

Contingent - The dependent project relies on findings, methods or data collected in the parent project to move forward