Managing User Accounts in CHaMP Data Management System

Contents

Overview

The CHaMP Data Management System was built to meet the needs of the CHaMP program. Anyone who is engaged in implementing the CHaMP program will need an account on the CHaMP website, www.CHaMPMonitoring.org. Additionally, anyone who is interested in the progress or products produced by the program may want to register for an account. The data system supports users in:

- conducting pre-season site evaluations,
- planning hitches,
- organizing scouting files,
- capturing raw measurements,
- uploading and compiling data,
- performing quality assurance, and
- generating metrics.

User Permissions

Once a user has registered for an account and has logged into the website, the user will have the lowest level of permissions and will only have access to published data. Additional permissions can be granted by your crew supervisor, the watershed manager, or the program manager. If you need additional permissions, work directly with your crew supervisor, watershed manager, or program manager to be granted the permissions you need.

Crew-level permissions are managed by crew supervisors and include:

- **Crew member** – has permission to view, upload, and edit data collected by your organization and can update Site Notes for specified watershed.
- **Crew lead** – additionally, can create and plan hitches. Responsible for managing the field crew which includes ensuring protocol and its methods are being followed.
- **Crew Supervisor** – additionally, can edit published data and can assign crew-level permissions. Responsible for QA that happens at end of field season.

Watershed-level permissions are managed by watershed managers and include:

- **Landowner Liaison** - Has permission to edit data on Site Evaluation tab for specified watershed and specifically is responsible for contacting landowners and updating landowner information
- **Watershed QA Lead** - Has ability to review uploaded data from anyone under a watershed, and provide an assessment or feedback on data quality. Has permission to view and edit data. Has ability to "flag" a set of Measurement data and/or Metric data.
- **Watershed Analyst** - Has ability to view and download data for specified watershed.
- **Watershed Manager** – additionally, can edit watershed-level parameters (e.g. stream temperature thresholds for anomaly detection) and can assign crew-level permissions.

Program-level permissions are managed by program managers and include:

- **Program Analyst** - Has ability to review uploaded data for specified program and provide an assessment or feedback on data quality.
- **Program QA Lead** - Has ability to review uploaded data from anyone under any watershed, and provide an assessment or feedback on data quality.
- **Monitoring Coordinator** - Has extensive domain knowledge; defines monitoring objectives, metric and indicator procedures, sets level of accuracy and precision.
- **Program Manager** - Has all of the permissions of monitoring coordinators, but can also edit program information (overview, people, documents).
- **Program Owner** - Has overall responsibility for the CHaMP program, from both an on-the-ground and office perspective.

Requesting User Permissions

Permissions are managed by crew supervisors, watershed managers, and program managers. For crew-level permissions, work directly with your crew supervisor to determine and be granted the permission you need. For watershed-level permissions, work directly with the watershed manager for the watershed you are interested in. If you need access to data across multiple organizations or watersheds, contact one of the program managers – Sarah Walker or Boyd Bouwes.
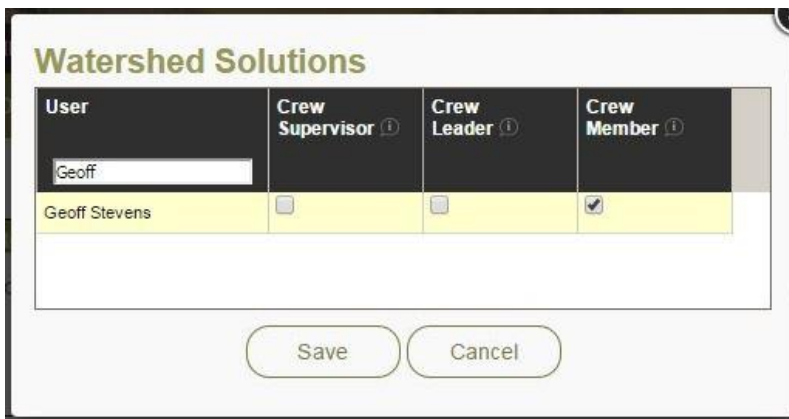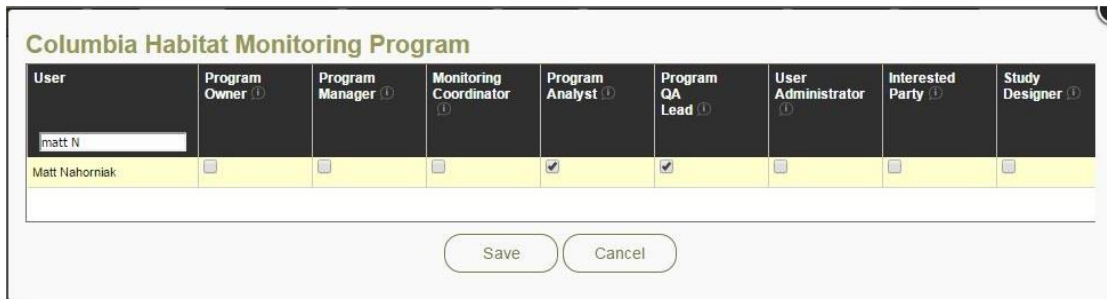
Managing Crew-level Permissions

The Crew Supervisor is responsible for managing permissions of all crew members within their organization. Crew permissions are managed from the Organization page.

1. From the Admin Menu item, select Organizations
2. Search for and select your organization
3. From your organization's page, select the People tab
4. On the People tab, in the upper right corner, click the link for "Edit Role Assignments"

5. In the popup, search for the name of the user

6. Click the checkbox for any appropriate role and click save.
7. From the People tab on your Organization page, verify the list of crew members

Managing Watershed-level Permissions

The Watershed Manager is responsible for managing permissions of all users within their watershed. Watershed permissions are managed from the Watershed page.

1. From the Watershed Menu, select your watershed
2. Search for and select your organization
3. From your watershed page, select the Overview tab and then the People tab
4. On the People tab, in the upper right corner, click the link for "Edit Role Assignments"
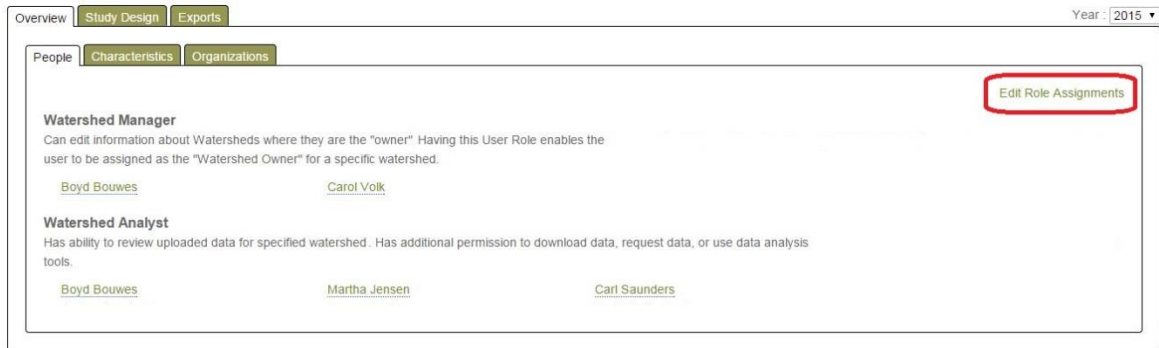
5. In the popup, search for the name of the user
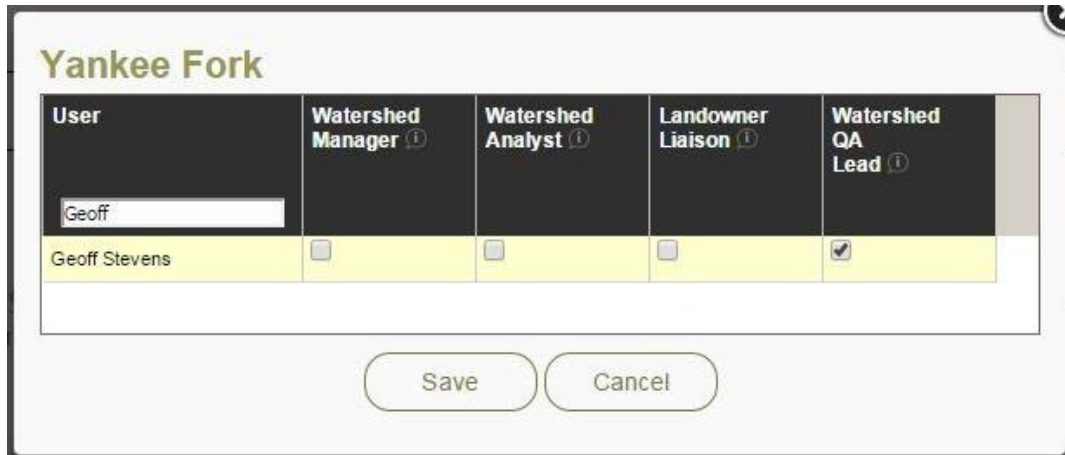
6. Click the checkbox for any appropriate role and click save.
7. From the People tab on your Watershed page, verify the list of watershed members.

Managing Program-level Permissions

The Program Managers are responsible for managing permissions of all users who need access across multiple watershed or organization. Program permissions are managed from the Program page.

1. From the Program Menu, select the People Tab
2. On the People tab, in the upper right corner, click the link for "Edit Role Assignments"

3. In the popup, search for the name of the user

4. Click the checkbox for any appropriate role and click save.
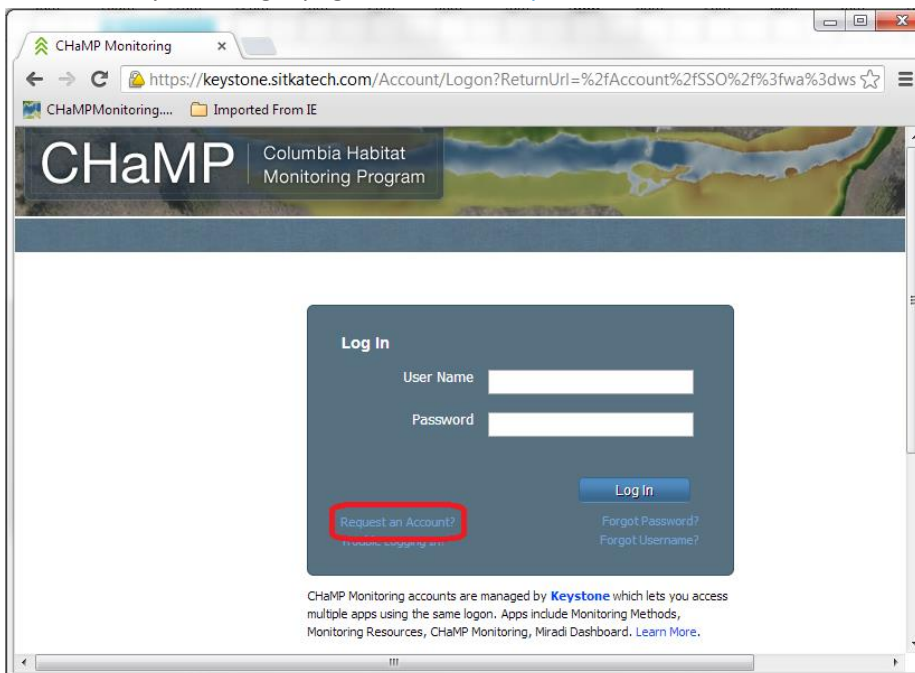5. From the People tab on the Program page, verify the list of Program members.

Registering for an Account

Registering for an account will allow you to log into the website and give you access to data and necessary functionality. Account registration and administration is handled through a system called Keystone. Keystone is the central account administrator for several regional data systems including Monitoring Methods, Monitoring Resources, Taurus, and CHaMP Monitoring. This guidance document outlines the steps to register for an account using Keystone.

1. Go to www.CHaMPMonitoring.org
2. Click "Log In" link in the upper right corner
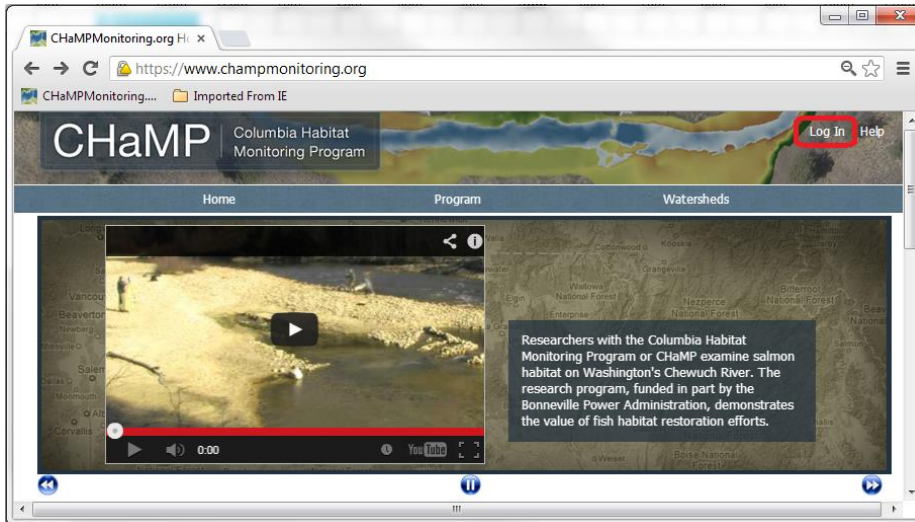
3. From the Keystone login page, click the "Request an Account?" link

4. Fill in account details and then click the "Request Account" button

5. Check your email account for an email from donotreply@keystone.sitkatech.com and use the link in the email to activate your new account.
6. Return to www.CHaMPMonitoring.org and log in using your new user name and password.