THE PUBLIC CONSULTATION TRACKING SYSTEM USER GUIDE

PCTS

NOAA FISHERIES SERVICE
NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION

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NOAA FISHERIES SERVICE
NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION

THE PUBLIC CONSULTATION TRACKING SYSTEM USER GUIDE

1. Introduction

1.1 Purpose

NOAA's National Marine Fisheries Service is the federal agency, a division of the Department of Commerce, responsible for the stewardship of the nation's living marine resources and their habitat. NOAA's National Marine Fisheries Service is responsible for the management, conservation and protection of living marine resources within the United States' Exclusive Economic Zone (water three to 200 mile offshore). Using the tools provided by the Magnuson-Stevens Act, NOAA's National Marine Fisheries Service assesses and predicts the status of fish stocks, ensures compliance with fisheries regulations and works to reduce wasteful fishing practices. Under the Marine Mammal Protection Act and the Endangered Species Act, NOAA's National Marine Fisheries Service recovers protected marine species (i.e. whales, turtles) without unnecessarily impeding economic and recreational opportunities. With the help of the six regional offices and eight councils, NOAA's National Marine Fisheries Service is able to work with communities on fishery management issues. NOAA's National Marine Fisheries Service works to promote sustainable fisheries and to prevent lost economic potential associated with overfishing, declining species and degraded habitats. NOAA's National Marine Fisheries Service strives to balance competing public needs.

1.2 Overview

The Public Consultation Tracking System (PCTS) is an information management system covering National Marine Fisheries Service (NOAA Fisheries) consultations under the Endangered Species Act (ESA) and under the Magnuson-Stevens Fishery Conservation and Management Act sections 305(b)(2) & 305(b)(4) Essential Fish Habitat (EFH).

The National Marine Fisheries Service is responsible for administering Section 7 of the ESA and Section 3, EFH, of the MSA.

- Under Section 7 of the ESA, a Federal action agency is required to consult with NMFS to ensure that any action that it authorizes, funds or carries out is not likely to jeopardize the continued existence of any listed or proposed species or result in the destruction or adverse modification of designated or proposed critical habitat.

- Under Section 305(b)(2) of the MSA, Federal agencies must consult with NMFS regarding any of their actions authorized, funded, or undertaken, or proposed to be authorized, funded, or undertaken, that may adversely affect EFH.
- NMFS headquarters is located in Silver Spring, MD. NMFS is divided into six geographic regions. Alaska Region, Northeast Region, Northwest Region, Pacific Islands Region, Southeast Region, and Southwest Region.

There are four basic roles in the consultation workflow process. The following are descriptions of these roles:

- ***Service*** – The U.S Fish and Wildlife Service (USFWS) and the National Marine Fisheries Service (NMFS) share responsibility for administering the ESA.
- ***Federal Action Agency*** –

  7(a)(1) of the ESA directs Federal agencies, in consultation with and with the assistance of the Secretary of the Interior or of Commerce, as appropriate, to utilize their authorities to further the purposes of the Act by carrying out conservation programs for listed species.

  7(a)(2) of the ESA requires every Federal action agency, in consultation with and with the assistance of the Secretary, to insure that any action it authorizes, funds or carries out in the United States or upon the high seas, is not likely to jeopardize the continued existence of any listed species, or results in the destruction or adverse modification of critical habitat.

  7(a)(3) of the ESA authorizes a prospective permit or license applicant to request the issuing Federal action agency to enter into early consultation with the Service on a proposed action to determine whether such action is likely to jeopardize the continued existence of listed species or result in the destruction or adverse modification of critical habitat.

  7(a)(4) of the ESA requires Federal agencies to confer with the Secretary on any action that is likely to jeopardize the continued existence of proposed species or result in the destruction or adverse modification of proposed critical habitat.

  7(c) of the ESA requires Federal agencies to submit biological assessments if listed species or critical habitat may be present in the area affected by any major construction activity.

- 7(d) of the ESA prohibits Federal agencies and applicants from making any irreversible or irretrievable commitment of resources which has the effect of foreclosing the formulation or implementation of reasonable and prudent alternatives which would avoid jeopardizing the continued existence of listed species or resulting in the destruction or adverse modification of critical habitat.

- 7(e)-(o) of the ESA provide procedures for granting exemptions from the requirements of section 7(a)(2).
- ***Non-Federal Representative (NFR)*** – 50 CFR § 402.08 A Federal action agency may designate a non-Federal representative (e.g., a state agency) to conduct informal consultation or prepare a biological assessment by giving written notice to the Director of such designation. If a biological assessment is prepared by the designated NFR, the Federal action agency shall furnish guidance and supervision and shall independently review and evaluate the scope and contents of the biological assessment. The ultimate responsibility for compliance with section 7 remains with the Federal action agency.
- ***Applicant*** – Applicant refers to any person who requires formal approval or authorization from a Federal action agency as a prerequisite to conducting the action. The applicant provides information to the Federal action agency regarding the proposed action. The applicant can be the party who carries out the approved or authorized action, and who carries out the terms and conditions in the biological opinion, if any.

  Applicant-related regulations:

  - 50 CFR § 402.08 - If a permit or license applicant is involved and is not the designated non-Federal representative, then the applicant and Federal action agency must agree on the choice of the designated non-Federal representative.
  - 50 CFR § 402.14(e) - If an applicant is involved, the Service and the Federal action agency may mutually agree to extend the consultation provided that the Service submits to the applicant, before the close of the 90 days, a written statement setting forth: (1) the reasons why a longer period is required, (2) the information that is required to complete the consultation, and (3) the estimated date on which the consultation will be completed. A consultation involving an applicant cannot be extended for more than 60 days without the consent of the applicant. Within 45 days after concluding formal consultation, the Service shall deliver a biological opinion to the Federal action agency and any applicant.
  - 50 CFR § 402.14(f) - The responsibility for conducting and funding any studies belongs to the Federal action agency and the applicant, not the Service.
  - 50 CFR § 402.14(g)(5) – The Service may discuss with the Federal action agency and any applicant the basis for any finding in the biological opinion, and the availability of reasonable and prudent alternatives (if a jeopardy opinion is to be issued) that the agency and the applicant can take to avoid violation of section 7 (a)(2). The Service will utilize the expertise of the Federal action agency and any applicant in identifying these alternatives. The 45-day period in which the biological opinion must be delivered will not be suspended unless the Federal action agency secures the written consent of the applicant to an extension to a specific date. The applicant may request a copy of the draft opinion from the

Federal action agency. All comments on the draft biological opinion must be submitted to the Service through the Federal action agency, although the applicant may send a copy of its comments directly to the Service.

1.3 PCTS Web Site

The PCTS Homepage is located at: www.pcts.noaa.gov.

The PCTS web site is available to all users via the internet. However, in order to perform additional functions within the system, a login is required for both federal agency users and NMFS users.

1.3.1 System Requirements

Accessing the system is available from a user's workstation using one of the following internet browsers:

- Internet Explorer 7.0 and above
- Firefox 3.7 and above

1.3.2 Getting Started

PCTS is intended for use by the public, federal action agencies, as well as the NMFS user. PCTS can be broken down into four main queries: Consultation Query, Corps Permit Query, Federal Agency Status Query, and the NMFS General User Query. In addition, a NMFS user can be categorized as a general user, data entry user, or an admin. A NMFS Data Entry user and a NMFS Admin user have additional privileges that allow them to modify consultations.

Both the Consultation Query and the Corps Permit Query functions are public searches and do not require a user to login. However, the Federal Agency Status Query and the NMFS General User Query functions require a user account and password.

1.3.3 Obtaining an Account

A user account is required to create and edit records specific ESA Section 7 and MSA EFH consultations. Anyone within NMFS may access PCTS by visiting the PCTS homepage (provided above). The user will have full view access to all of the data within the application and may run queries to generate reports and view decision documents. Many other options are available as well.

A user account is required to create and edit PCTS specific data. To obtain an account, please contact your Regional PCTS Coordinator. Once your request for access has been approved, you will receive an e-mail from the NMFS HQ Helpdesk. Please follow the instructions as provided and call the NMFS HQ Help Desk to obtain your temporary password. Please read the instructions carefully as things often change.

Please note that a ".mil", "fed.us", or ".gov email address is required for login.

1.3.4 User Account Life Cycle

PCTS accounts have two life-cycles. 90 days and 365 days.

- Accounts have a 90-day life cycle. All user accounts will be required to reset their passwords within 90 business days. If no activity at 90-days, the account will be suspended and the user must request the account be reset.
- Accounts that display no activity for a total of 365 days, the account will be removed. The user must request the account be reestablished.
- Newly setup accounts have 72hrs to access the PCTS application, otherwise the request will become inactive and the account removed.

1.4 Logging In

The username and password are case sensitive, and it is important to enter them with the correct spelling and case to successfully login to PCTS.

Before logging in, a disclaimer will appear. In order to proceed, the user must read the disclaimer and then check the "I Agree" box. Once checked, the user will be able to enter in their Username and Password. A ".mil", "fed.us", or ".gov" email address is required to login. The user can then click on "Login" to continue or "Cancel" to return to the home page.

Figure 1.1: Logging In

1.4.1 Password Maintenance

A. Entering a New Password

You must enter your current password once and your new password twice. A confirmation screen displays immediately upon successfully changing a password.

NOTE: When PCTS provides a username/password, you will be prompted to change the password immediately upon your first successful login. The system assigned password will be randomly generated and will not be easy to remember.

Passwords for user accounts, including privileged-user accounts (e.g., root, superuser, or administrator), must have at least twelve (12) non-blank characters.

Passwords must contain characters from at least three (3) of the following four (4) categories:

1. English upper case characters (A ... Z);
2. English lower case characters (a ... z);
3. Base 10 digits (0 ... 9); and
4. Non-alphanumeric (For example,!, $#%).

B. Resetting a Forgotten Password

In the event you forget your PCTS password, select the "Forgot password? Click here to reset." link located on the Login Page. Follow the directions, and once your identity is confirmed and the provided information matches your stored profile, a new password will be sent to your email address.

C. Security Questions

To ensure additional security in case of a forgotten password, the user will need to create three challenge questions and answers. This is required when the user logs in for the first time and can be updated in the User Profile (Figure 1.2).

D. Failure to Log In

If a user tries to log in and fails five times in a row, the account will be temporarily locked. The user will then need to wait 30 minutes for the system to unlock the account.

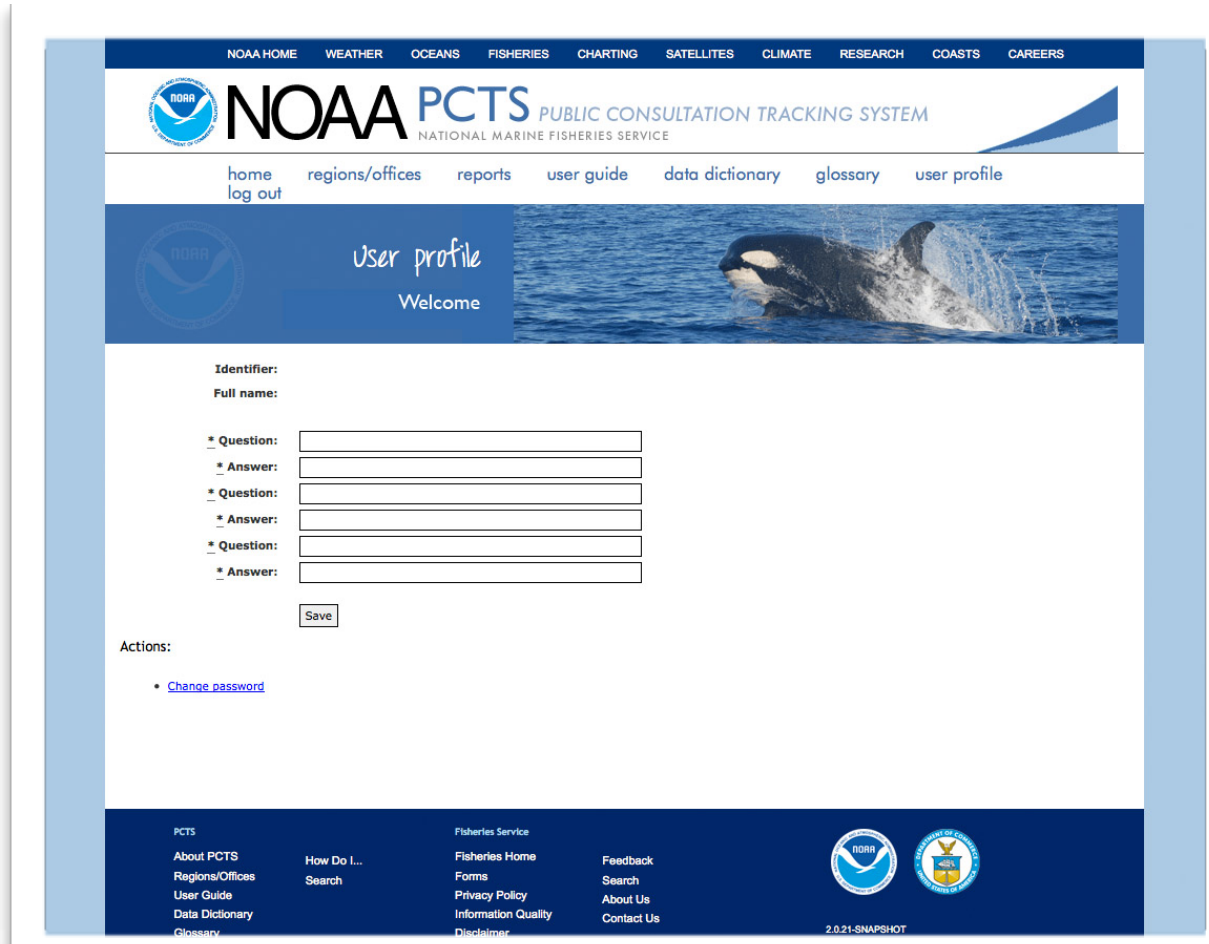


Figure 1.2: User Profile

2. PCTS NAVIGATION

PCTS is comprised of 4 navigations: the Top Navigation, Main Navigation, Secondary Navigation, and Bottom Navigation. The main section of the website, also known as the Body, contains text that displays the search fields or search results.

2.1 The Top Navigation

The Top Navigation is displayed at the top of each page and provides links to common functions.

Function	Description
Home	Shortcut to return to the home page.
Regions/Offices	Shortcut to NOAA's Regional Connections.
Reports	Allows user to run reports based on specific criteria.
User Guide	Quick access to the user guide in PDF format.
Data Dictionary	List of all data fields, their definitions as it relates to PCTS and a hyperlink to the child records (pick lists) if applicable.
Glossary	List of descriptions for each field in the system.

Users with an account will see some or all of these additional links in their Top Navigation once they log in.

Login Functions	Description
Profiles	List of all the profiles in the system. A profile is the configuration for the different Trackable types (Project, Consultation, Implementation Record). Available to Admin users only.
Users	List of all the users in the system. Available to Admin users only.
Regions	Manage regions/office hierarchy. Available to Admin users only.
User Profile	This feature allows the user to update their user profile, which includes password or security questions. Available for all users with an account, either Federal Action Agency users or NMFS users.
Logout	This is available to all users with an account. Quick access to log out of the system.

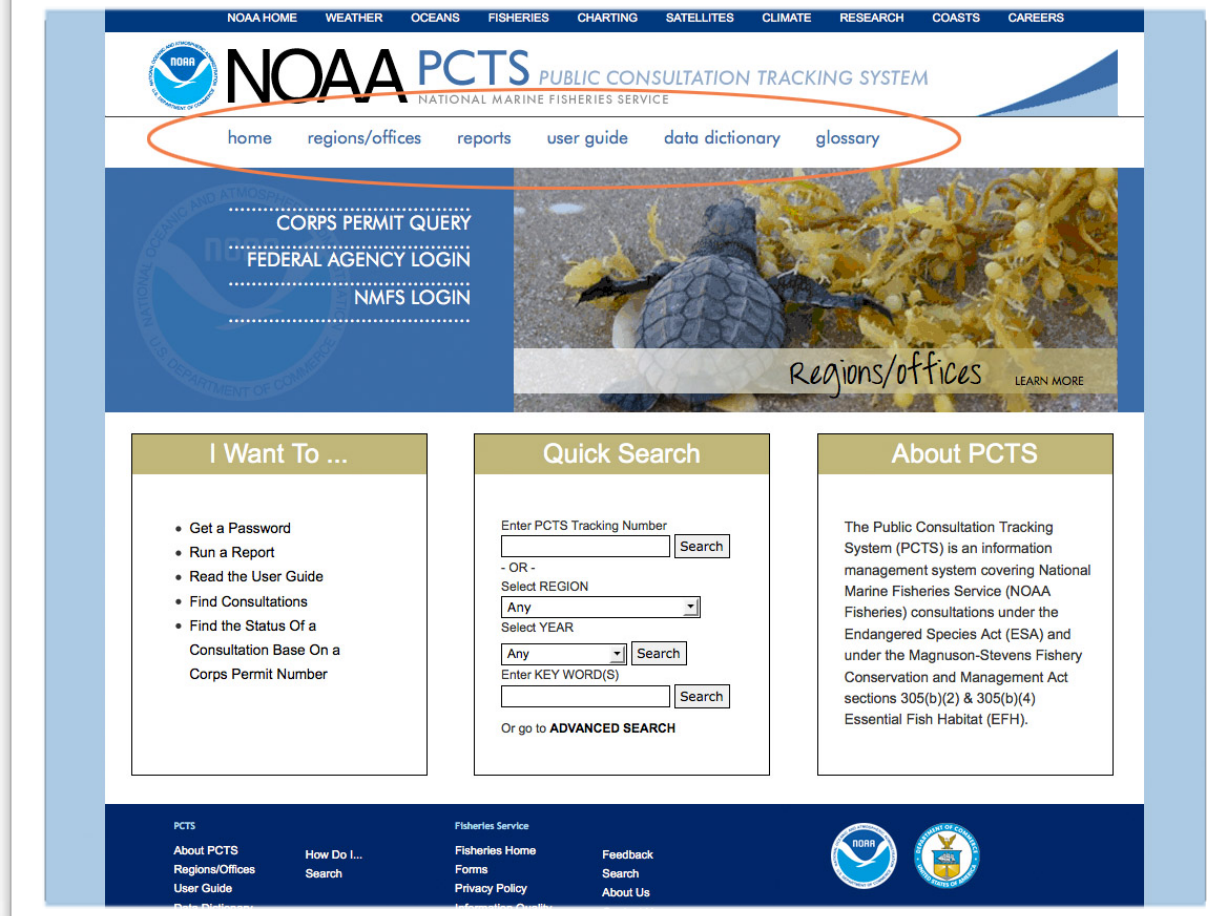


Figure 2.1: Top Navigation

2.2 Main Navigation

The main navigation, located on the home page, consists of links that allow the user to conduct queries and reports within PCTS. The links include the following:

1. Corps Permit Query
2. Federal Agency Login
3. NMFS Login

Figure 2.2: Main Navigation

2.3 Secondary Navigation

The secondary navigation, located, directly under the title banner, lists links directly associated with PCTS function a user has selected. These links include the following:

Link	Description
Enter Data	Allows user to create, edit, update, reinitiate or cross reference a consultation
Find Consultations	Allows NMFS user to search for consultations
Federal Agency Status Query	Allows NMFS users to access the Federal Action Agency query site. Federal Action Agency users do not see this link.

Figure 2.3: Secondary Navigation

2.4 Bottom Navigation

The Bottom Navigation is located at the end of each page. There are directly related to the NOAA website and have no relation to PCTS as well as links to the PCTS website for quick reference no matter which page a user is on.

The following links are available to access the NOAA web site from PCTS:

4. Fisheries Home
5. Forms
6. Privacy Policy
7. Information Quality
8. Disclaimer
9. Feedback
10. Search
11. About Us
12. Contact Us

The links that access the PCTS website include the following:

1. About PCTS
2. Regions/Offices
3. User Guide
4. Data Dictionary
5. Glossary
6. I Want To...
7. Search

Figure 2.4: Bottom Navigation

2.5 Exiting PCTS 2.0

To exit PCTS 2.0, click on the "Logout" option, which is the last link on the Main Navigation Menu.

Figure 2.5: Logging Out

3. PCTS Home Page

3.1 Main Body

In addition to the various navigations, the PCTS Home Page also includes three main sections located in the body of the main home page that contain links to additional functionality for the system.

3.1.1 I Want To

This section contains links to the most commonly used functions for PCTS.

I Want To	Description
Get a Password	Allows the user to request a login and password to perform additional functions within PCTS.
Run a Report	Connects the user to the COGNOS Reporting and allows the user to run reports based on specific criteria.
Read the User Guide	Links the user to the PDF version of the PCTS User Guide.
Find Consultations	This link performs the same function as "Advanced Search".
Find the Status of a Consultation based on a Corps Permit Number	This link performs the same function as "Corps Permit Query" in the Main Navigation.

3.1.2 Quick Search

This feature allows the user to search consultations by using minimal required fields. In this section, a user will be able to search one of three different ways: by PCTS Tracking Number; by Region and Year; or by Key Word. There is also a link to go to an advanced search.

3.1.3 About PCTS

This last section gives a general overview of PCTS.

Figure 3.1: Main Body

4. Consultation Definition

ESA and MSA (EFH) must be tracked separately. With the use of the [an internal/external] reporting tool, the information can be gathered to better understand what took place during the time of consultation. NMFS must understand if a combined response occurred, but the data remain separate.

4.1 ESA

By regulation, there are several kinds of consultation. Following are their definitions:

- Formal – A formal consultation is required when the action may affect listed species or critical habitat.
- Informal – An informal consultation may be conducted to assist the Federal action agency in determining if the proposed action is not likely to adversely affect listed species or critical habitat. During informal consultation:
    - If NMFS provides written concurrence with the 'not likely to adversely affect' determination, no further consultation is required.
    - If NMFS does not concur, the Federal action agency must initiate a formal consultation, as described above.
- Conference – A conference is required when the action is likely to jeopardize the continued existence of any proposed species or result in the destruction or adverse modification of proposed critical habitat.
- Early – If a prospective applicant has reason to believe that the prospective action may affect listed species or critical habitat, it may request the Federal action agency to enter into early consultation with NMFS. The prospective applicant must certify in writing to the Federal action agency that (1) it has a definitive proposal outlining the action and its effects and (2) it intends to implement its proposal, if authorized.
- Emergency – Where emergency circumstances mandate the need to consult in an expedited manner, consultation may be conducted informally regarding Federal action agency actions required to respond to the emergency. This provision applies to situations involving acts of God, disasters, casualties, national defense or security emergencies, etc. (imminent threat and danger to human life and property). Formal consultation must be initiated as soon as practicable after the emergency is under control.
- Incremental step – When the action is authorized by a statute that allows the agency to take incremental steps toward the completion of the action (e.g., petroleum or mineral exploration), NMFS may conduct a formal consultation on only the incremental step being considered.

By convention, NMFS also conducts:

- Programmatic – Many Federal agencies implement nation-wide programs, or promulgate national regulations that often do not include site specific actions that have been traditionally the subject of consultations. NMFS consults on those programs at a broad scale. Often, discrete activities conducted or implemented under those programs are subject to further consultation through step-down consultations. Programmatic consultation are provides a means for NMFS and a Federal action agency to consult regarding a potentially large number of individual actions that may adversely affect listed species or critical habitat. Programmatic consultation will generally be the most appropriate option to address funding programs, large scale planning efforts, and other instances where sufficient information is available to address all reasonably foreseeable adverse effects on listed species or critical habitat of an entire program, parts of a program, or a number of similar individual actions occurring within a given geographic area.

Programmatic consultations may used for actions likely to have minor, repetitive predictable effects for non-specific locations within a geographic scope. In a programmatic consultation, the Federal action agency identifies categories of similar planned projects in a pre-defined geography, for which the exact timing and/or locations are unknown. However, the projects will be conducted in the same way regardless of location or timing, and the effects of all the projects are predictable and the outcomes are highly certain no matter where the projects are carried out or when.

- Batched – Batched consultations are used for similar known projects (e.g., bridge replacements, residential piers). If the Federal action agency submits multiple individual requests for consultation, NMFS and the Federal action agency jointly determine if the requests could be batched. The Federal action agency may also submit a single batched consultation request for multiple nearly identical projects in close proximity to each other.

4.2 EFH

By regulation, there are several kinds of consultations. The selection of a particular approach for handling EFH consultation depends on the nature and scope of the actions that may adversely affect EFH.

Following are their definitions:

- Use of existing environmental review procedures - Consultation and commenting under the Magnuson-Stevens Act should be consolidated, where appropriate, with interagency consultation, coordination, and environmental review procedures required by other statutes, such as NEPA, the Fish and Wildlife Coordination Act, Clean Water Act, ESA, and Federal Power Act. Many EFH consultations are combined with ESA consultations.

- General Concurrence - A general concurrence identifies specific types of Federal actions that may adversely affect EFH, but for which no further consultation is generally required because NMFS has determined, through an analysis of that type of action, that it will likely result in no more than minimal adverse effects individually and cumulatively. General concurrences may be national or regional in scope. For Federal actions to qualify for general concurrence, NMFS must determine that the actions meet all of the following criteria:
  - (A) The actions must be similar in nature and similar in their impact on EFH.
  - (B) The actions must not cause greater than minimal adverse effects on EFH when implemented individually.
  - (C) The actions must not cause greater than minimal cumulative adverse effects on EFH.
- Abbreviated Consultation - Federal actions that may adversely affect EFH should be addressed through the abbreviated consultation procedures when those actions do not qualify for a general concurrence, but do not have the potential to cause substantial adverse effects on EFH. For example, the abbreviated consultation procedures should be used when the adverse effect(s) of an action could be alleviated through minor modifications.
- Expanded Consultation – Expanded consultation procedures must be used for Federal actions that would result in substantial adverse effects to EFH. Expanded consultation allows maximum opportunity for NMFS and the Federal action agency to work together to review the action's impacts on EFH and to develop EFH Conservation Recommendations.
- Programmatic - Programmatic consultation provides a means for NMFS and a Federal action agency to consult regarding a potentially large number of individual actions that may adversely affect EFH. Programmatic consultation will generally be the most appropriate option to address funding programs, large scale planning efforts, and other instances where sufficient information is available to address all reasonably foreseeable adverse effects on EFH of an entire program, parts of a program, or a number of similar individual actions occurring within a given geographic area.
- Emergency - Consultation is required for emergency Federal actions that may adversely affect EFH, such as hazardous material clean-up, response to natural disasters, or actions to protect public safety. Federal agencies should contact NMFS early in emergency response planning, but may consult after-the-fact if consultation on an expedited basis is not practicable before taking the action.

5. Hierarchy

The Section 7, ESA and MSA (EFH) data will be tracked separately within the system. It is assumed that non-NMFS users will have some level of knowledge of Section 7 and EFH provisions when they log in to the system. When non-NMFS users first enter the system after login, they will be presented with simple questions to direct them to the correct location within the system for the function desired.

In the new system, all project-related activities must be linked to a single project identifier. The system must adequately capture the ability to relate & cross reference projects.

6. User Group Descriptions

6.1 General Public

The General Public refers to anyone wishing to learn more about individual consultations. This group will be able search the database using limited search criteria.

6.2 Corps Permit Applicant

The Corps Permit Applicant is anyone who has submitted a permit request. These users will be able to search for information on the consultation relative to their permit request by using a Clean Water Act (CWA) 404 permit number and the Corps District that is reviewing the request.

6.3 Federal Action Agencies

The Federal Action Agency User requires a login and can perform more in depth searches within PCTS.

6.4 NMFS General User

The NMFS General User refers to anyone within the NMFS organization who requires a login This user will be able to perform more in depth searches within PCTS.

6.5 NMFS Data Entry

In addition to having the the ability to perform more in depth searches as a General User, the NMFS Data Entry User is given permissions to create, edit, update, reinitiate, or cross reference consultations.

6.6 NMFS Admin

The NMFS Admin User has full privileges in the application and can enter and/or make changes to consultations. An Admin User is also able to view and edit profiles, users, and groups within PCTS.

7. Queries

There are four main types of input fields for each query.

Field Type	Description
Input Field	Field that allows the user to type in their selection.
Single Select	Drop down menu that allows user to select one option.
Multi Select	Scroll down menu that allows user to select one or more options. The user can click once to select an option. The user will need to hold down the "Ctrl" key and mouse click for each additional option selection.
Date Range	User can either type in the date or select a date from the pop out calendar. Desired month can be selected by clicking the arrow to the left or right or from the month drop down menu. Desired year can be selected from the bottom of the pop out calendar.

Figure 7.1: Input Field

Figure 7.2 Single Select

Figure 7.3: Multi Select

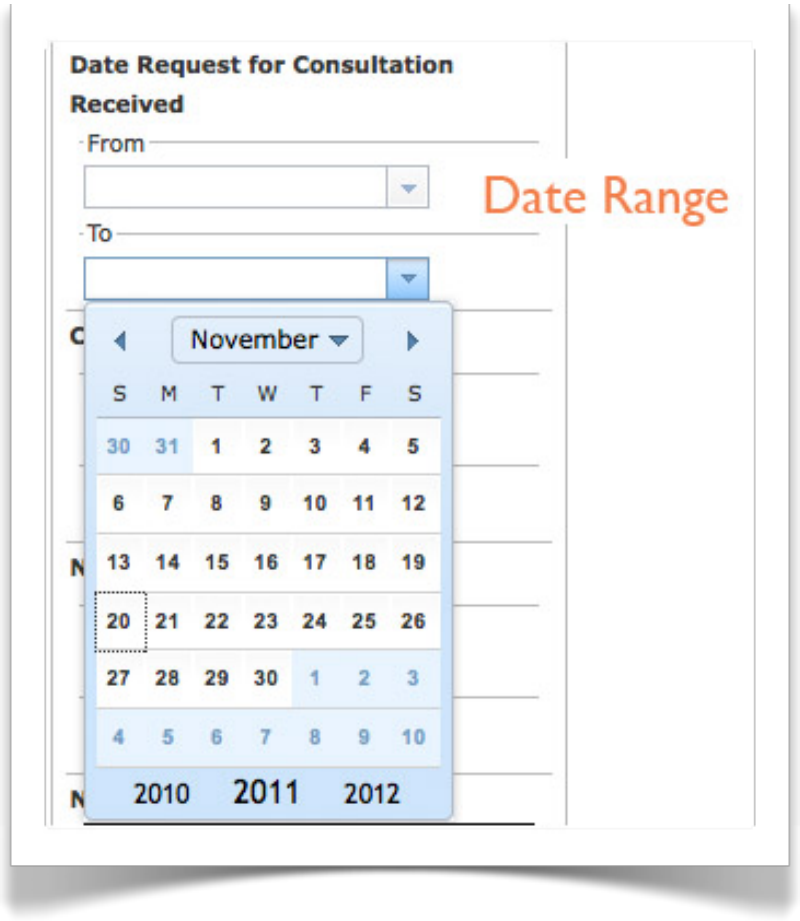


Figure 7.4: Date Range

7.1 Options for Each Query

Once the search criteria fields have been completed, the user has the option to select one of four of the following actions to continue:

13. Search
14. Export search result to PDF
15. Export search result to Excel
16. Clear - clear all search criteria entered by the user

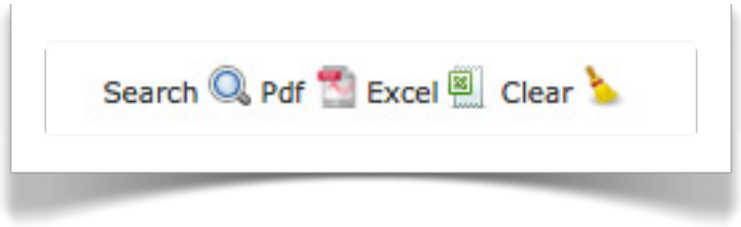


Figure 7.5: Query Options

8. Consultation Query Site

This type of query can be assessed by clicking on "Find Consultations" or entering in specific search criteria located on the home page. There is an option to search by "Quick Query", which allows the user to search by year and region, and a more general "Public Query", that contains additional search fields.

Figure 8.1: Consultation Query Site

8.1 Results

After the input fields have but completed, clicking on the "Search" link will display the results based on the search criteria. The total number of trackables will be displayed at the top of the search page. To navigate through the consultations, the user can choose the single arrow for the next page or the double arrow for the last page. These arrows are located at the top right of

the search results. Likewise, if you need to search previous pages, you can use the single or double arrows on the top left of the results page to search. In addition, the user can search by page number located at top middle of the search results.

Sorting the results can be done in several ways. The user can sort by Tracking Number, Title, and/or Region, in both ascending or descending order. Once the desired consultation is located, the user can then click on the Tracking Number and the results will be displayed. The user can click on links for additional actions related to the particular project (if available) or click on "Go to the main page" to return to the Consultation Query Site.

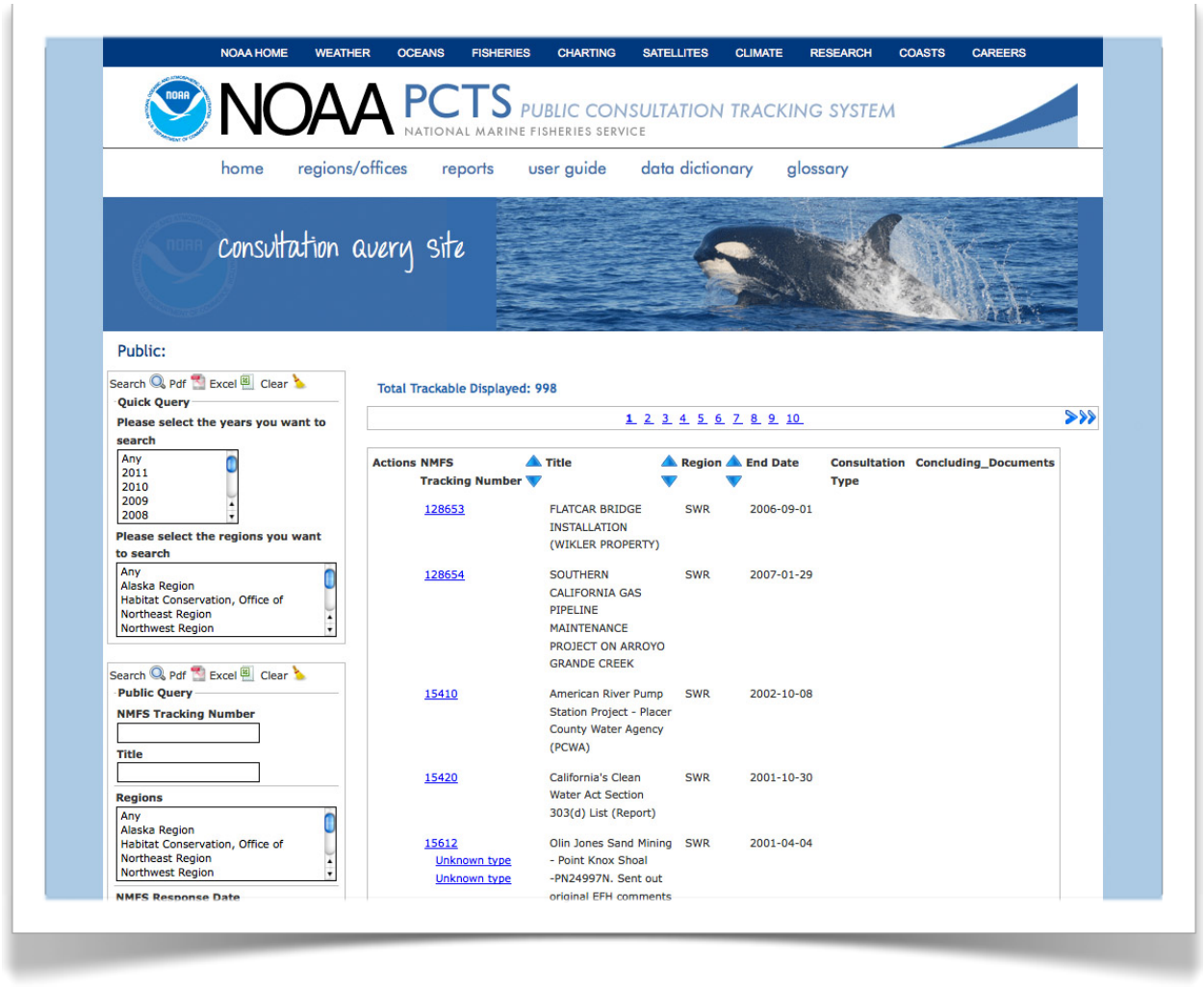


Figure 8.2: Consultation Query Site Results

9. Corps Permit Query Site

A user will be able to search this type of query by clicking on either the "Corps Permit Query" link in the Main Navigation or the "Find the Status of a Consultation based on a Corps Permit Number" in the Main Body.

This query provides information on the current status of Clean Water Act section 404 permit actions for which NOAA Fisheries has conducted an ESA section 7 consultation with the Corps of Engineers since the beginning of the 2001 fiscal year. In addition, permit applicants with activities in certain states (please check website a complete up to date listing) can check on the status of the consultation and on their permit application with the Corps of Engineers.

To check the status of consultation relative to the permit request, the user will need to know the CWA 404 permit number and the Corps District that is reviewing the request. If the user does not have the CWA 404 permit number, please contact the Corps' district office that issued the permit.

Figure 9.1: Corps Permit Site

9.1 Results

After the input fields have been completed, clicking on the "Search" link will display the results based on the status of the consultations associated with the corps permit number and corps district office entered into two categories: Pending and Completed (Figure 9.2). The total number of trackables will be displayed at the top of each section. To navigate through the consultations, the user can choose the single arrow for the next page or the double arrow for the last page. These arrows are located at the top right of the search results. Likewise, if you need to search previous pages, you can use the single or double arrows on the top left of the results page to search. In addition, the user can search by page number located at top middle of the search results.

Sorting the results can be done in several ways. The user can sort by Tracking Number, Title, and/or Region, in both ascending or descending order. Once the desired consultation is located, the user can then click on the Tracking Number and the results will be displayed. The user can click on links for additional actions related to the particular project (if available) or click on "Go to the main page" to return to the Corps Permit Query Site.

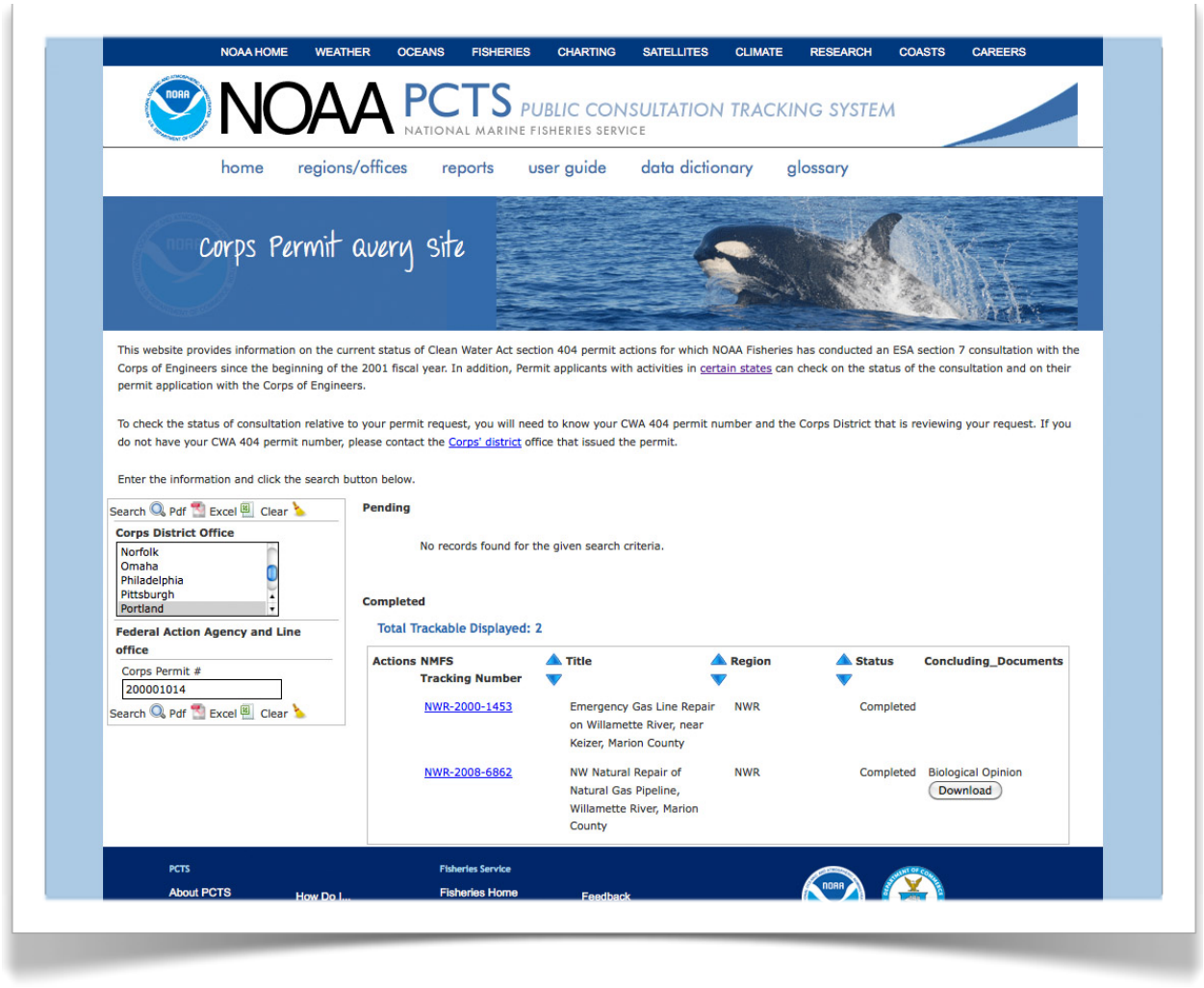


Figure 9.2: Corps Permit Site Results

10. Federal Action Agency Query

A user must log in to access the Federal Action Agency Query by clicking on the "Federal Agency Login" link located on the home page. This query allows both the NMFS user and Federal Action Agency user to search for trackables.

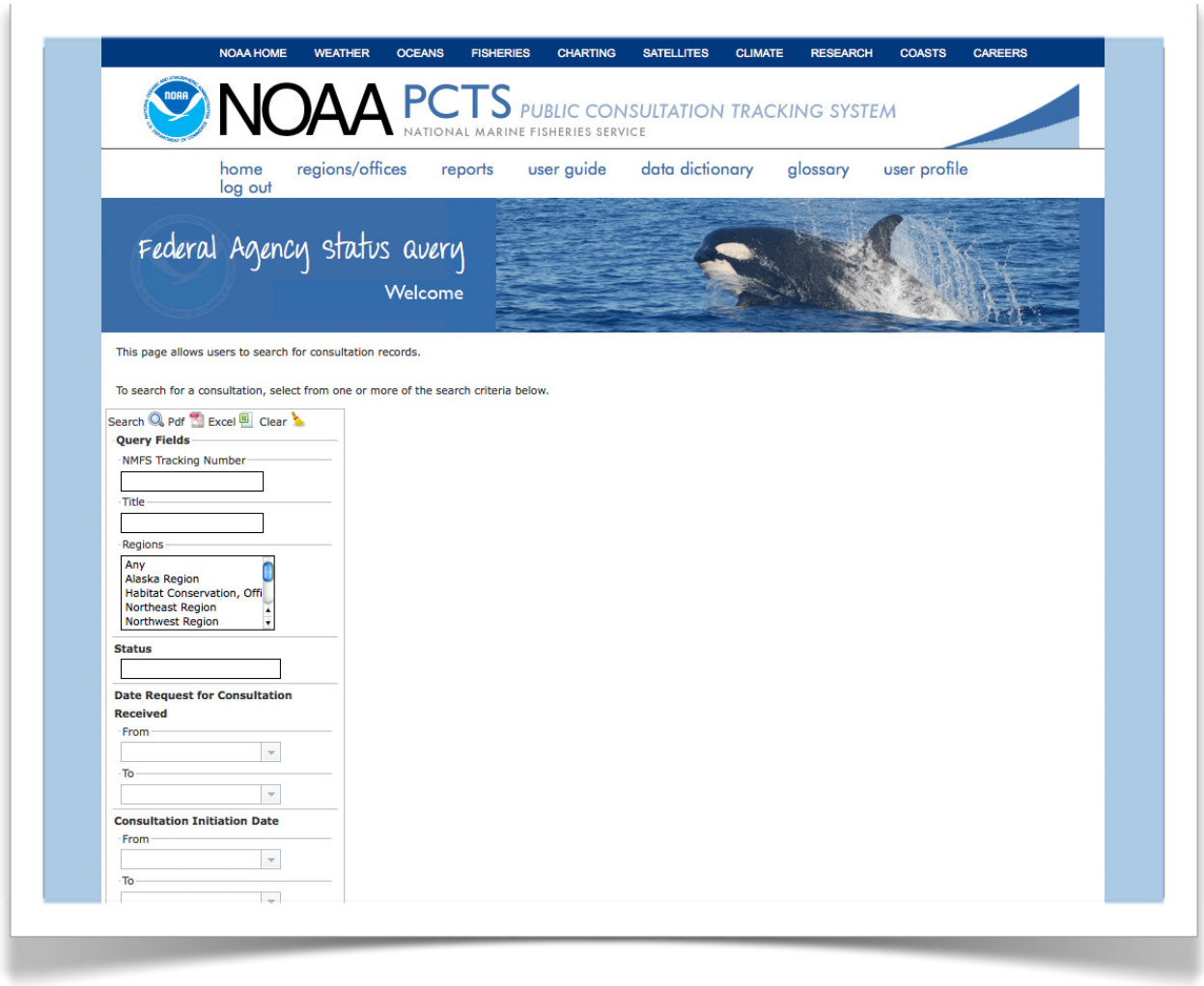


Figure 10.1: Federal Agency Status Query

10.1 Results

After the input fields have but completed, clicking on the "Search" link will display the results based on the search criteria (Figure 10.2). The total number of trackables will be displayed at the top of the search page. To navigate through the consultations, the user can choose the single arrow for the next page or the double arrow for the last page. These arrows are located at the top right of the search results. Likewise, if you need to search previous pages, you can

use the single or double arrows on the top left of the results page to search. In addition, the user can search by page number located at top middle of the search results.

Sorting the results can be done in several ways. The user can sort by Tracking Number, Title, and/or Region, in both ascending or descending order. Once the desired consultation is located, the user can then click on the Tracking Number and the results will be displayed. The user can click on links for additional actions related to the particular project (if available) or click on "Go to the main page" to return to the Federal Agency Status Query Site.

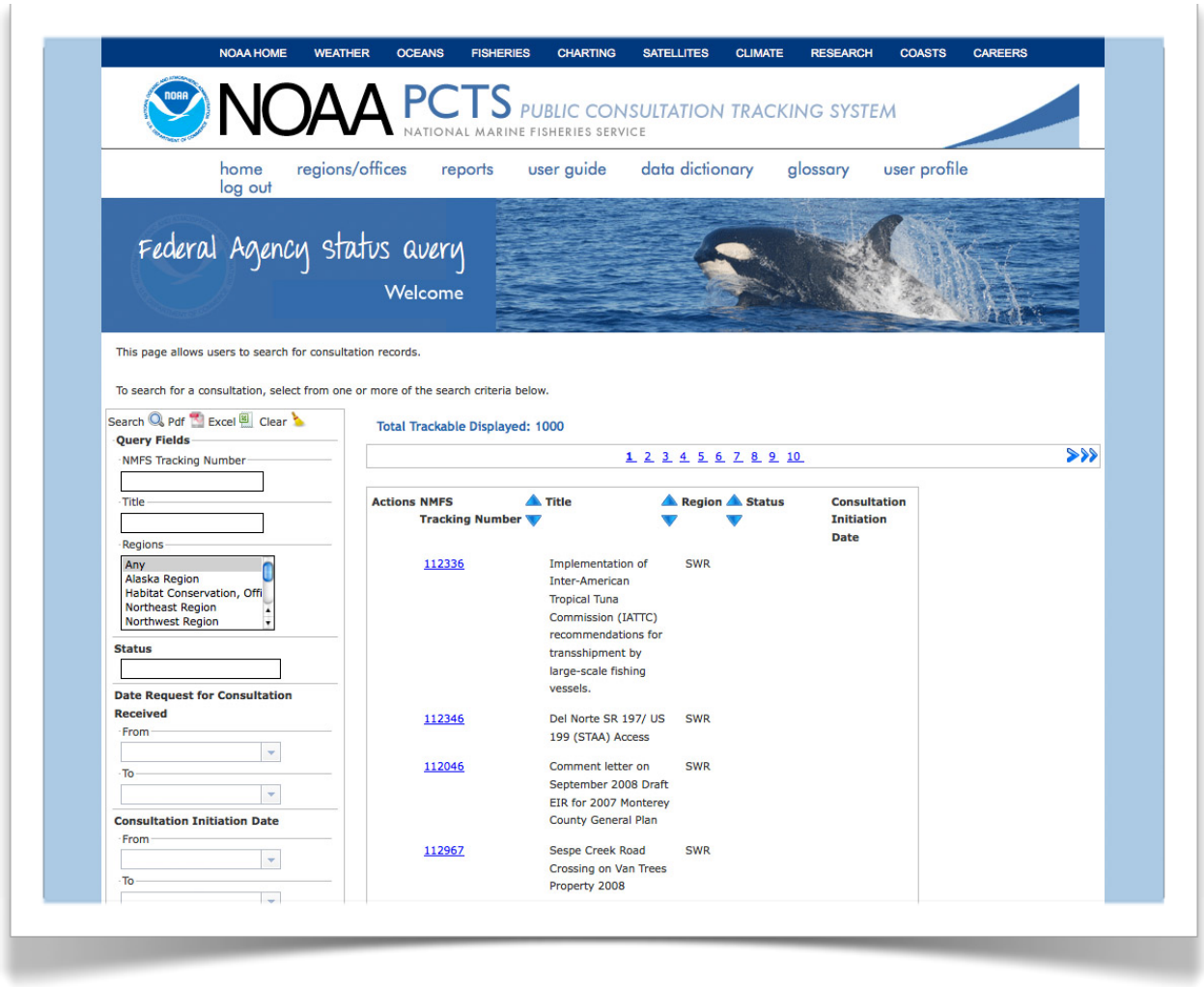


Figure 10.2: Federal Agency Status Query Results

10.2 User Profile

Located in the Top Navigation once a user logs in, the User Profile (Figure 1.2, Page 8) allows the user to change a password or update the security questions associated with the account.

11. NMFS Query

Access to this query requires the user to log in from the home page by clicking on "NMFS Login". There are three different types of NMFS users: General, Data Entry, and Admin.

11.1 NMFS General User

The NMFS General User refers to anyone within the NMFS organization who requires a login This user will be able to perform more in depth searches within PCTS by performing a consultation or federal agency status query.

Figure 11.1: NMFS General User Home Page

11.2 NMFS Data Entry User

In addition to having the the ability to perform more in depth searches as a NMFS General User, the NMFS Data Entry User is given permissions to create, edit, update, reinitiate, or cross reference consultations when choosing the Enter Data menu option.

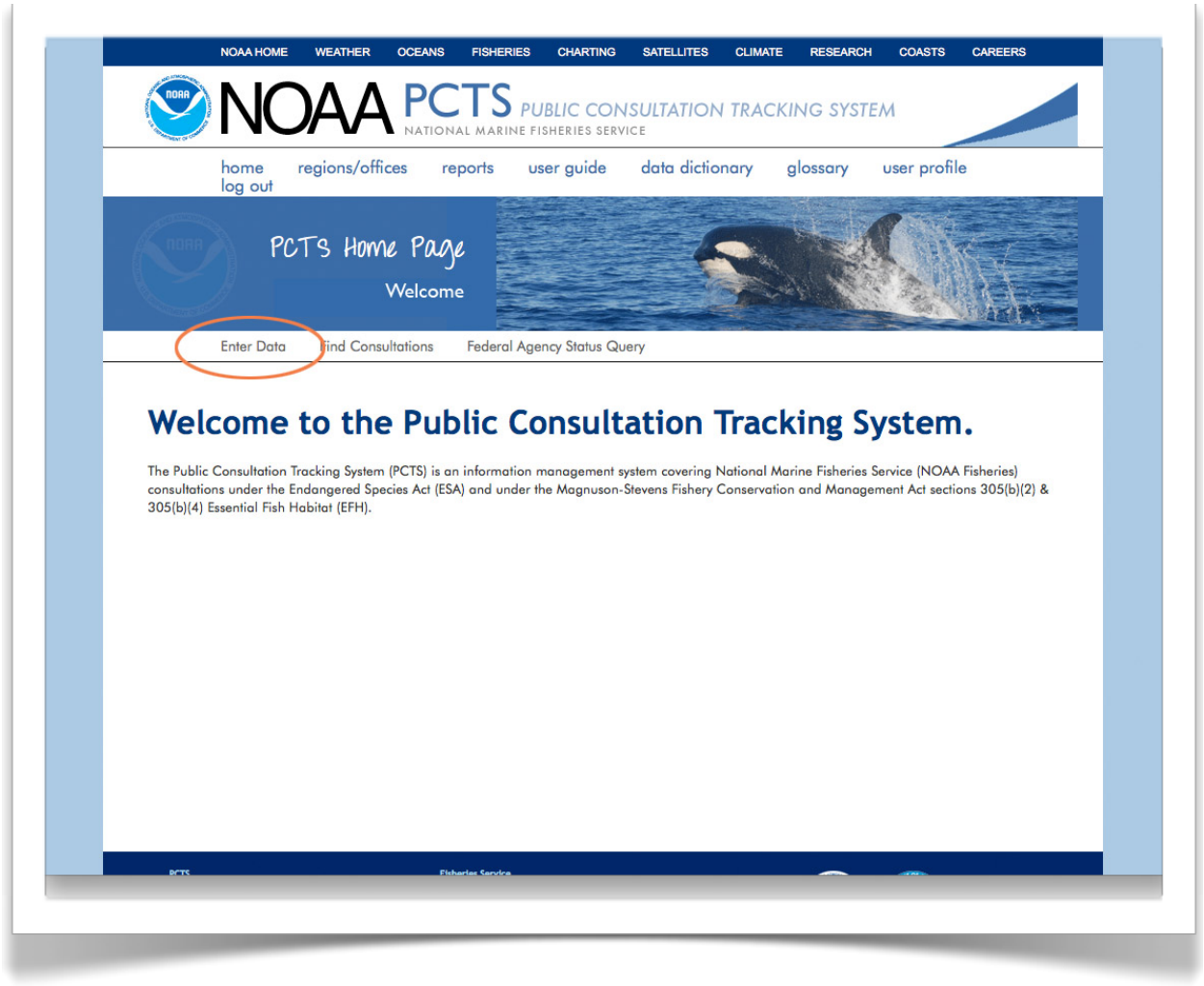


Figure 11.2: NMFS Data Entry Home Page

11.3 Enter Data

The Enter Data link allows the user to create new consultations, edit or update consultations, reinitiate consultations, or cross reference consultations.

Figure 11.3: Enter Data Page

11.3.1 Create New Consultations

When creating a new consultation, the user must choose the type of consultation that is being conducted. *Note: You can click on the "?" link for additional field help.*

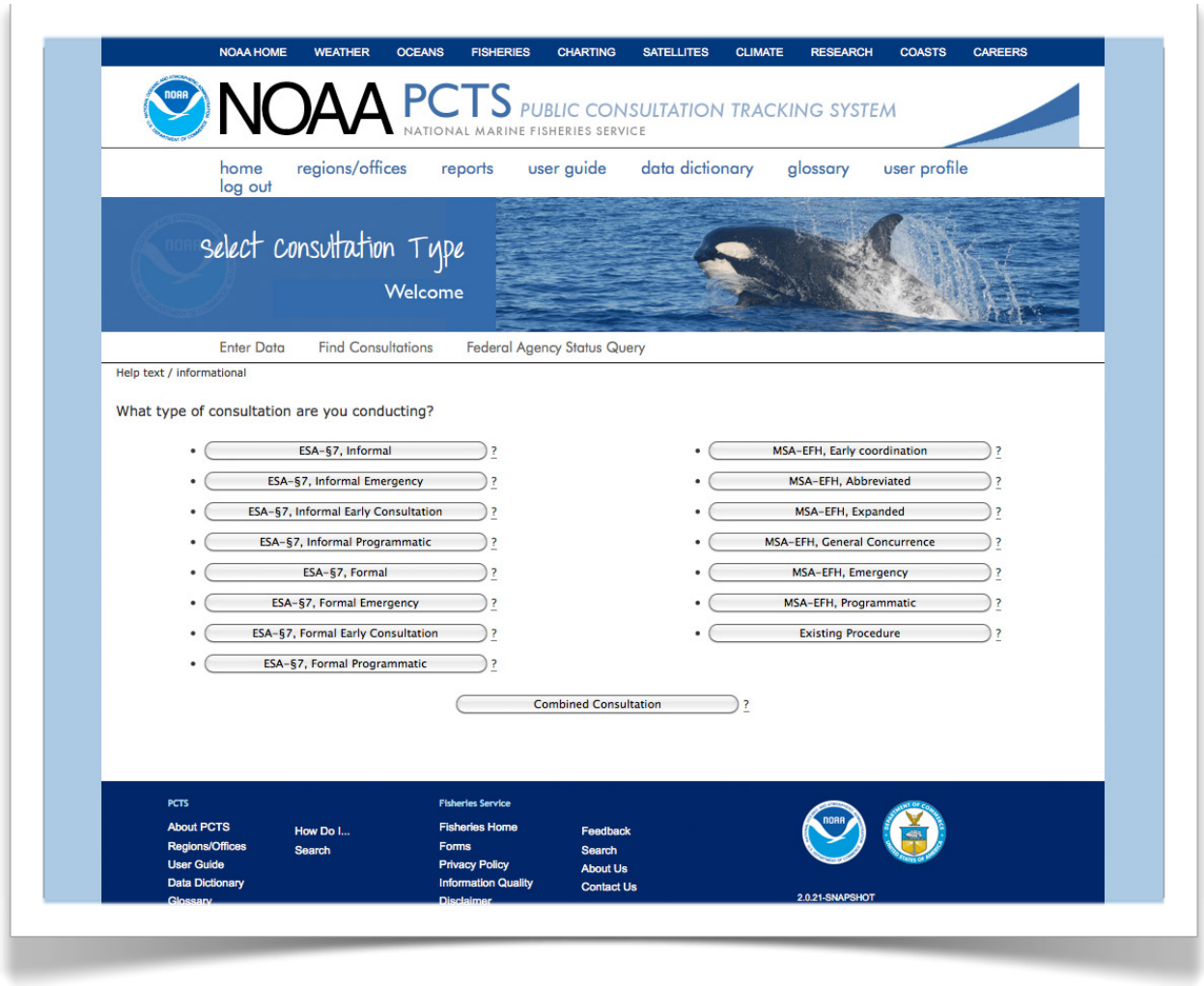


Figure 11.4: Select Consultation Type

After choosing type of consultation (in this example, ESA Informal has been chosen), a single view for creating a trackable is displayed (Figure 11.5). Required fields are designated with an asterisk (*). The required fields must be completed in order to save the consultation. In the event that any required fields were not completed, an alert message will appear to inform the user of what required fields are missing (Figure 11.6). Once the consultation has been created, a NMFS tracking number will be assigned and displayed on the confirmation page (Figure 11.7). The user can then choose to view the consultation summary (Figure 11.8) or return to the home page.

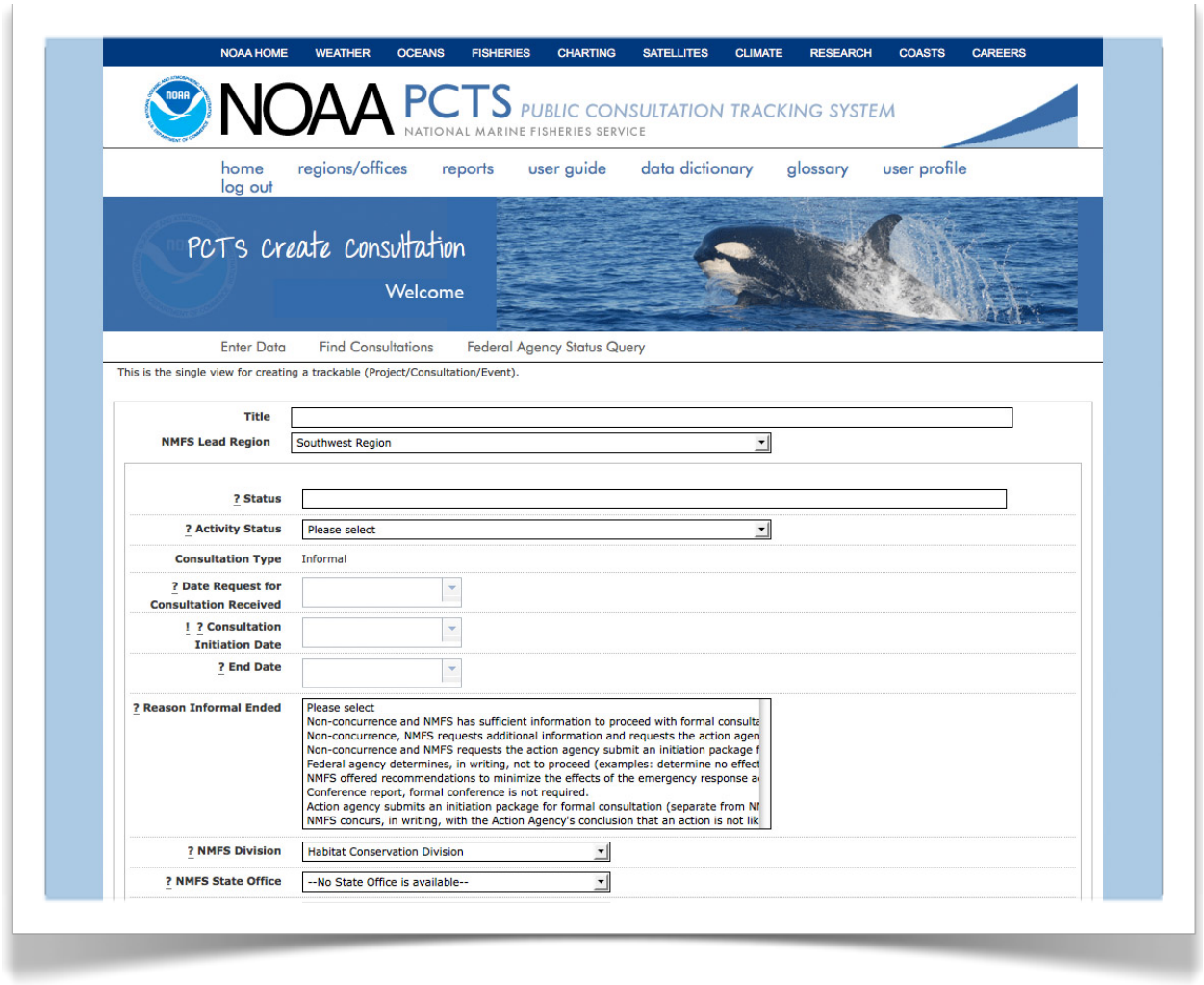


Figure 11.5: Create Consultation Page

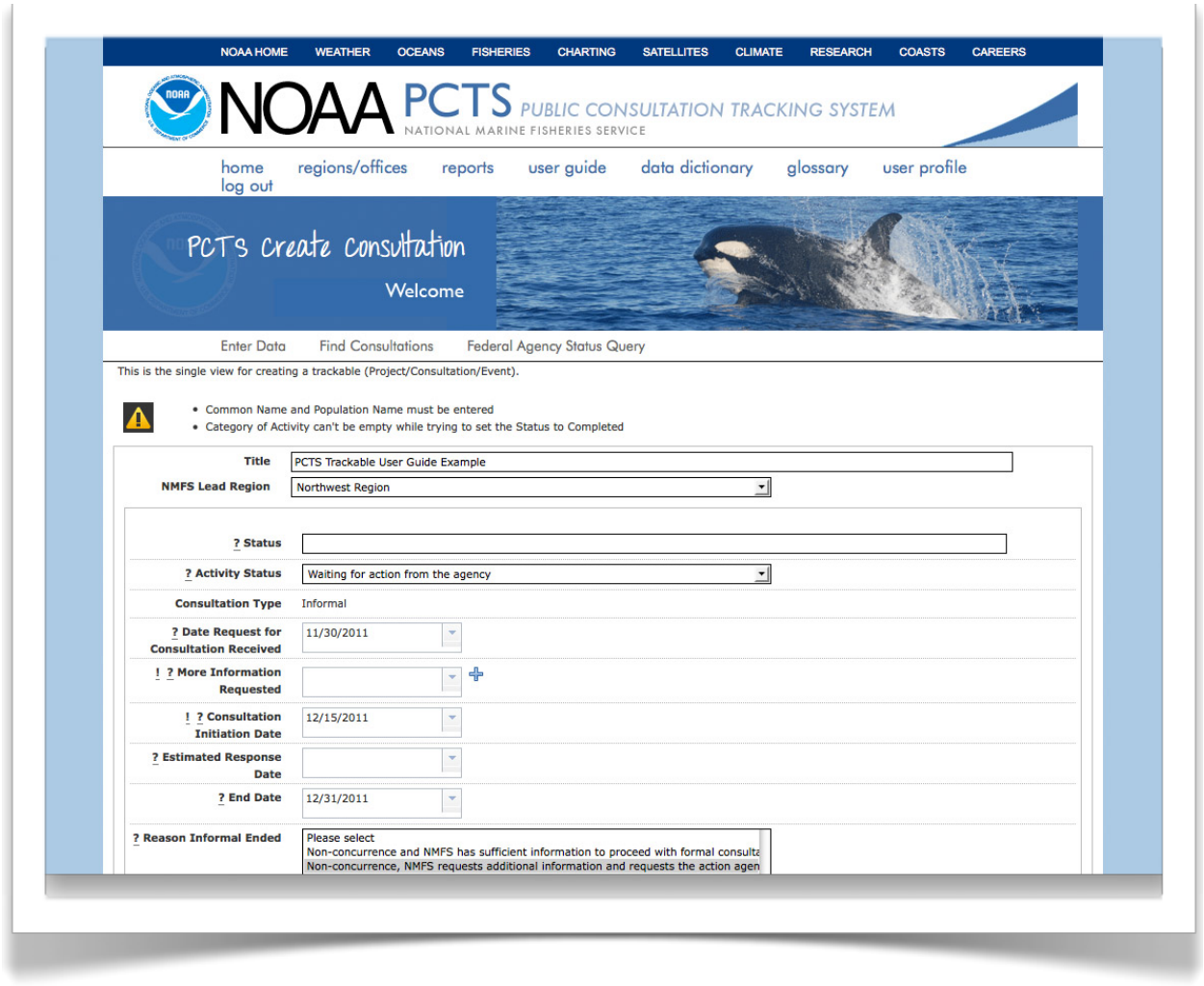


Figure 11.6: Missing Information Alert

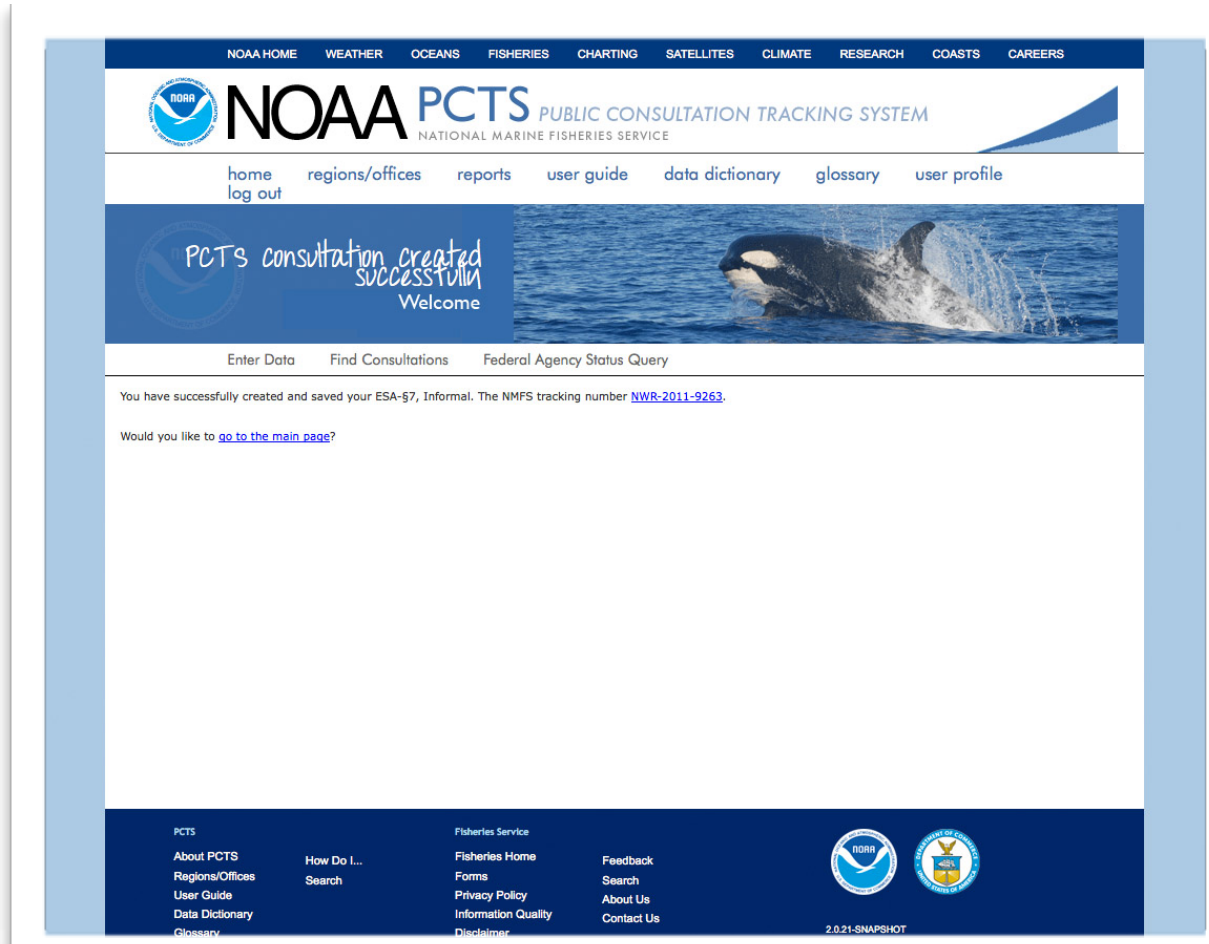


Figure 11.7: Consultation Created Successfully Page

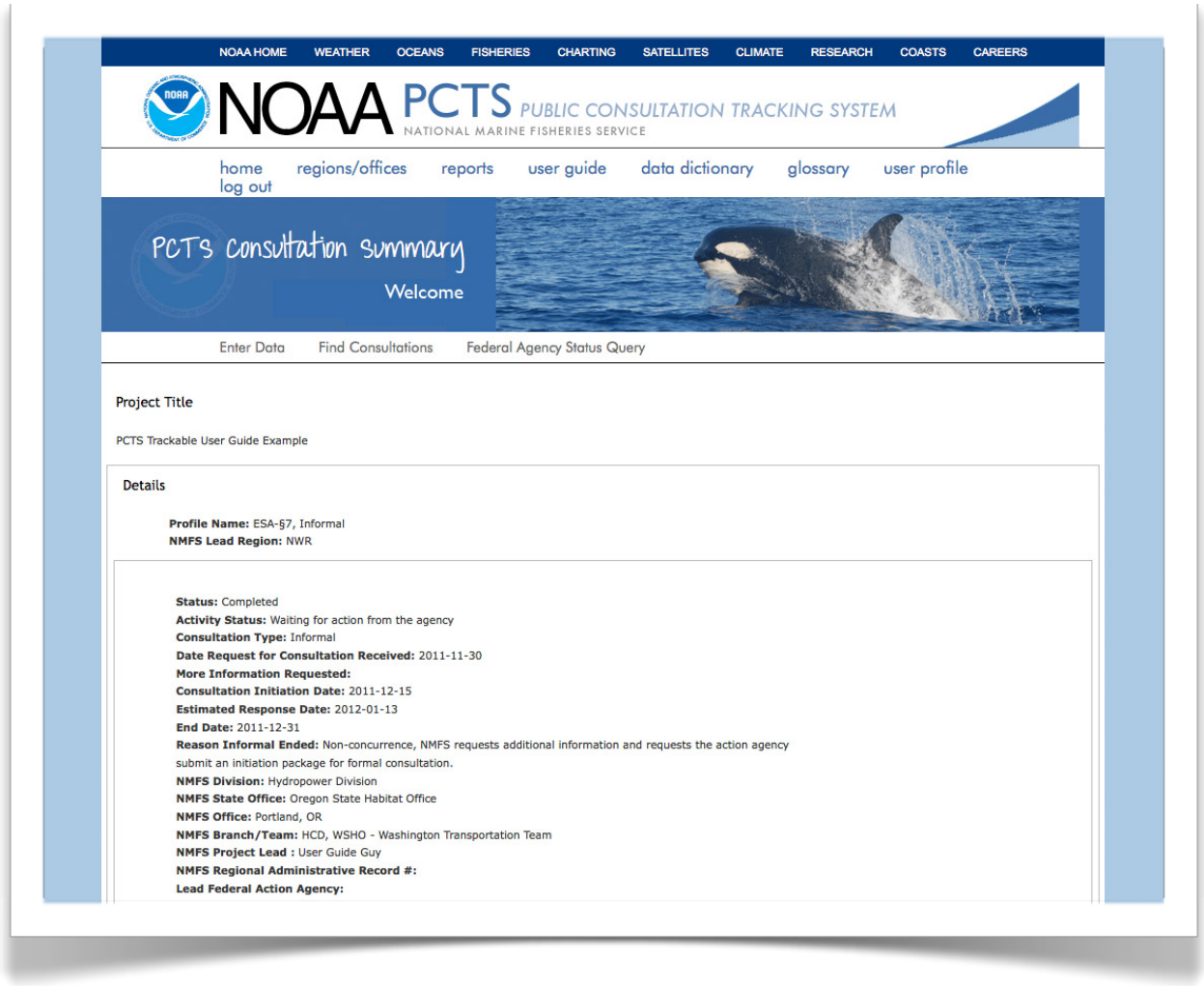


Figure 11.8: Consultation Summary

Once the consultation has been created, the user is able to perform actions related to the specified project. These actions are located at the bottom of the consultation summary and allows the user to Edit, Cross Reference, Reinitiate, or Combine the consultation. In addition, the user is also able to attach documents to the created consultation.

A. Combined Consultation

In addition to creating a new consultation, a user is able to combine consultations by choosing the "Combine Consultation" button on the Create a New Consultation page (Figure 11.9). First, an ESA consultation type must be chosen from the provided list (Figure 11.10). The input fields must then be filled out for this section of the consultation. Once saved, the MSA-EFH consultation type must be chosen (Figure 11.11). Any matching fields will automatically be filled in from the ESA consultation to the MSA-EFH consultation page.

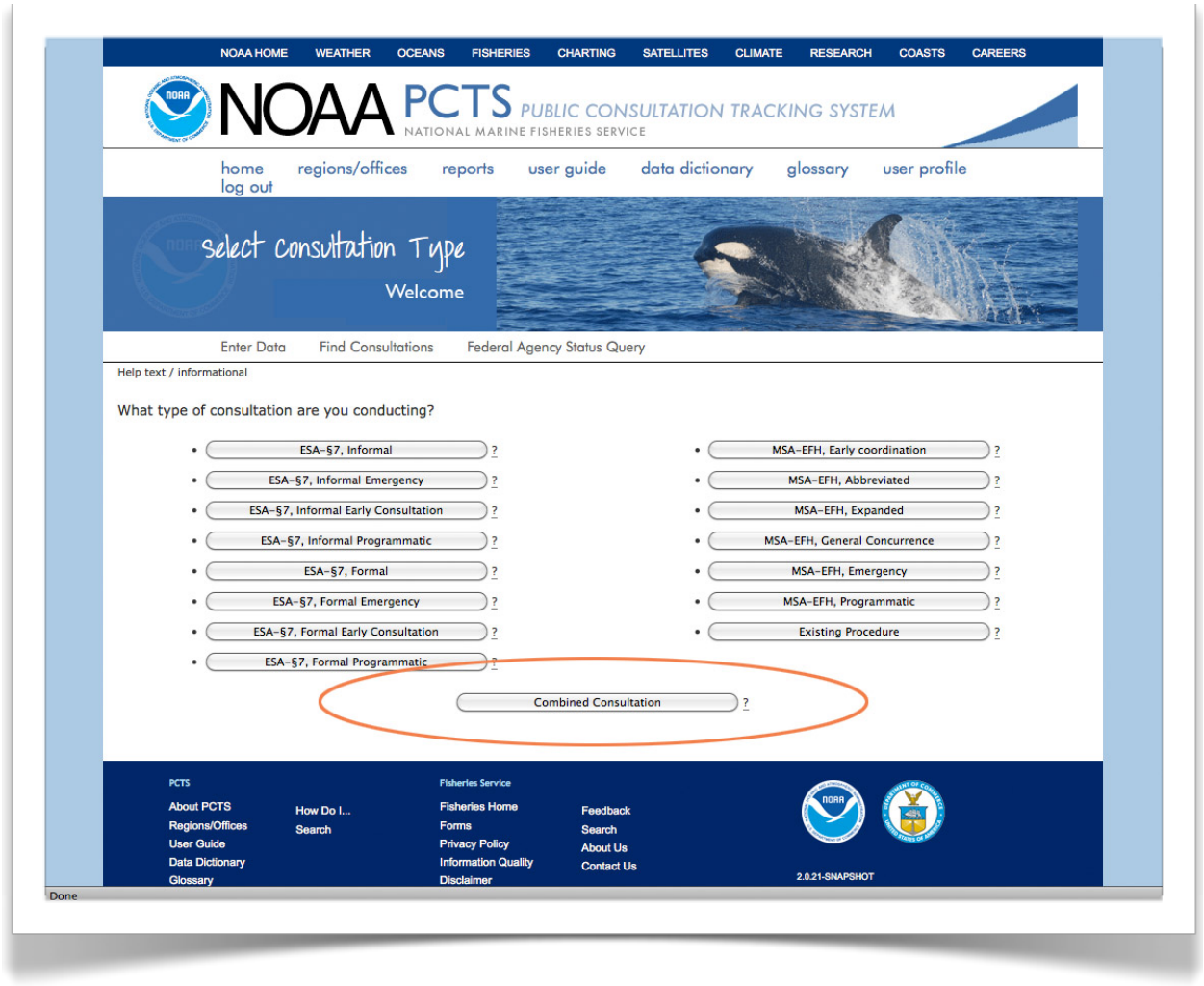


Figure 11.9: Combined Consultation

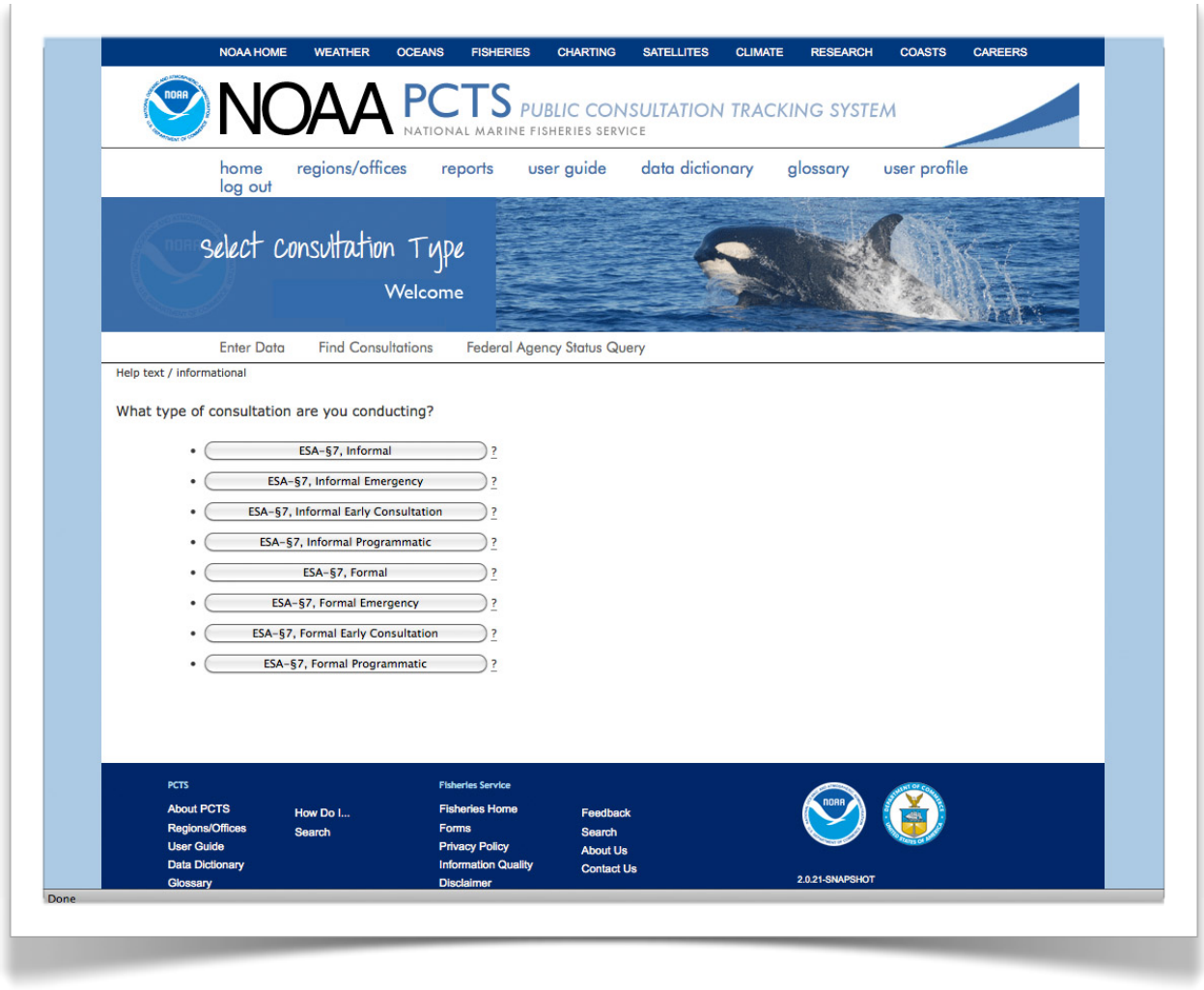


Figure 11.10: Choosing an ESA for Combined Consultation

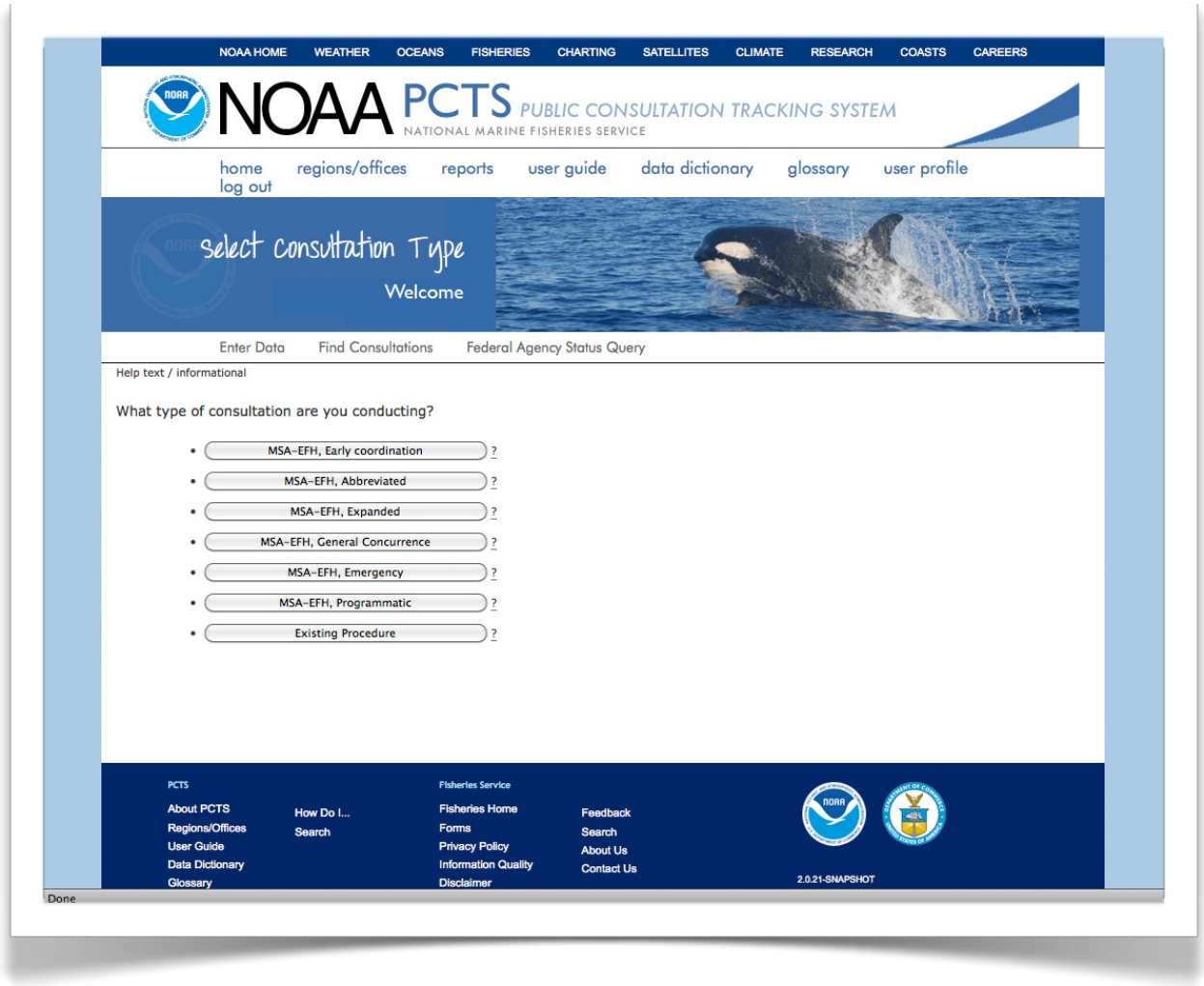


Figure 11.11: Choosing a MSA-EFH for Combined Consultation

When the combined consultation has been created, a new NMFS Tracking Number has been issued that includes both consultations (Figure 11.12). Each consultation will have the other one referenced in the "Combined Consultation" section of the record (Figure 11.13a).

Once the consultation has been created, the user is able to perform additional actions related to the specified project. These actions are located at the bottom of the consultation summary and allows the user to Edit, Cross Reference, or Reinitiate the record (Figure 11.13b). Users can either access these functions from the consultation summary page or from the "Enter Data" link.

Figure 11.12: Combined Consultation Creation Confirmation

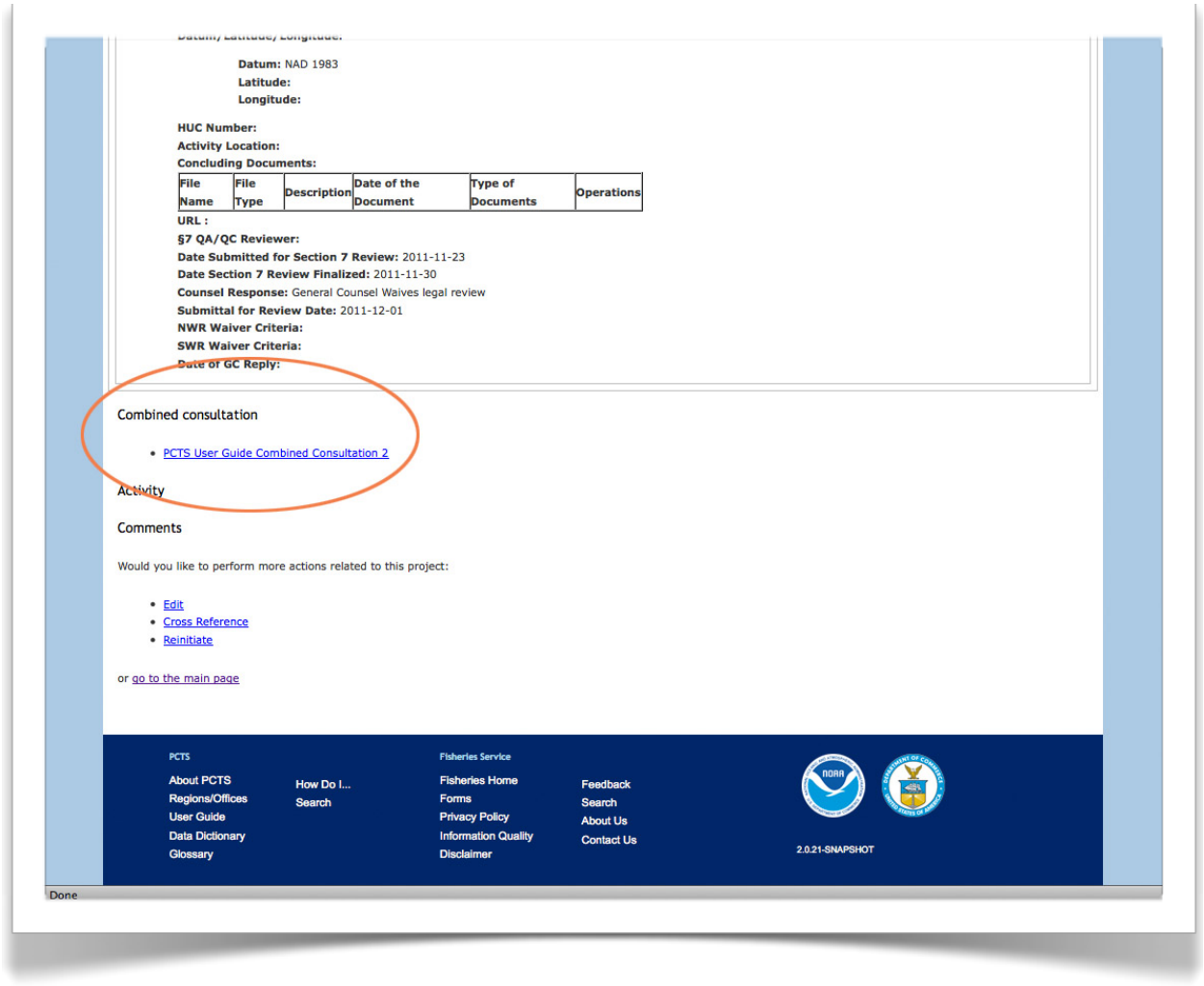


Figure 11.13a: Combined Consultation Information Added to Consultation

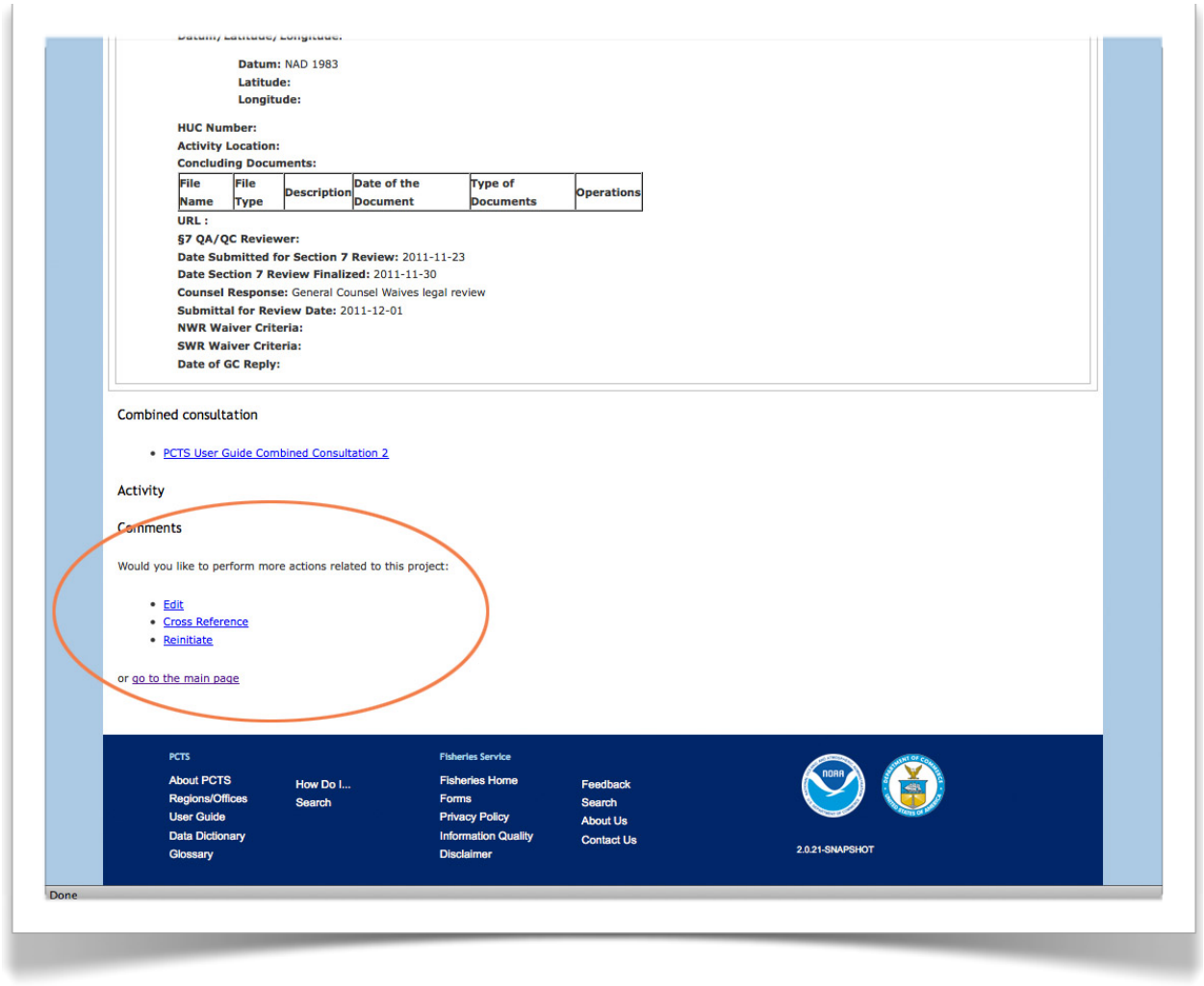


Figure 11.13b: Additional Actions Related to the Project

11.3.2 Edit or Update a Consultation

To edit or update a consultation, the user can choose the Edit or Update a Consultation link located on the Enter Data Page (Figure 11.3.) A search page will be displayed (Figure 11.14), and the user can enter in the input fields to locate the correct consultation.

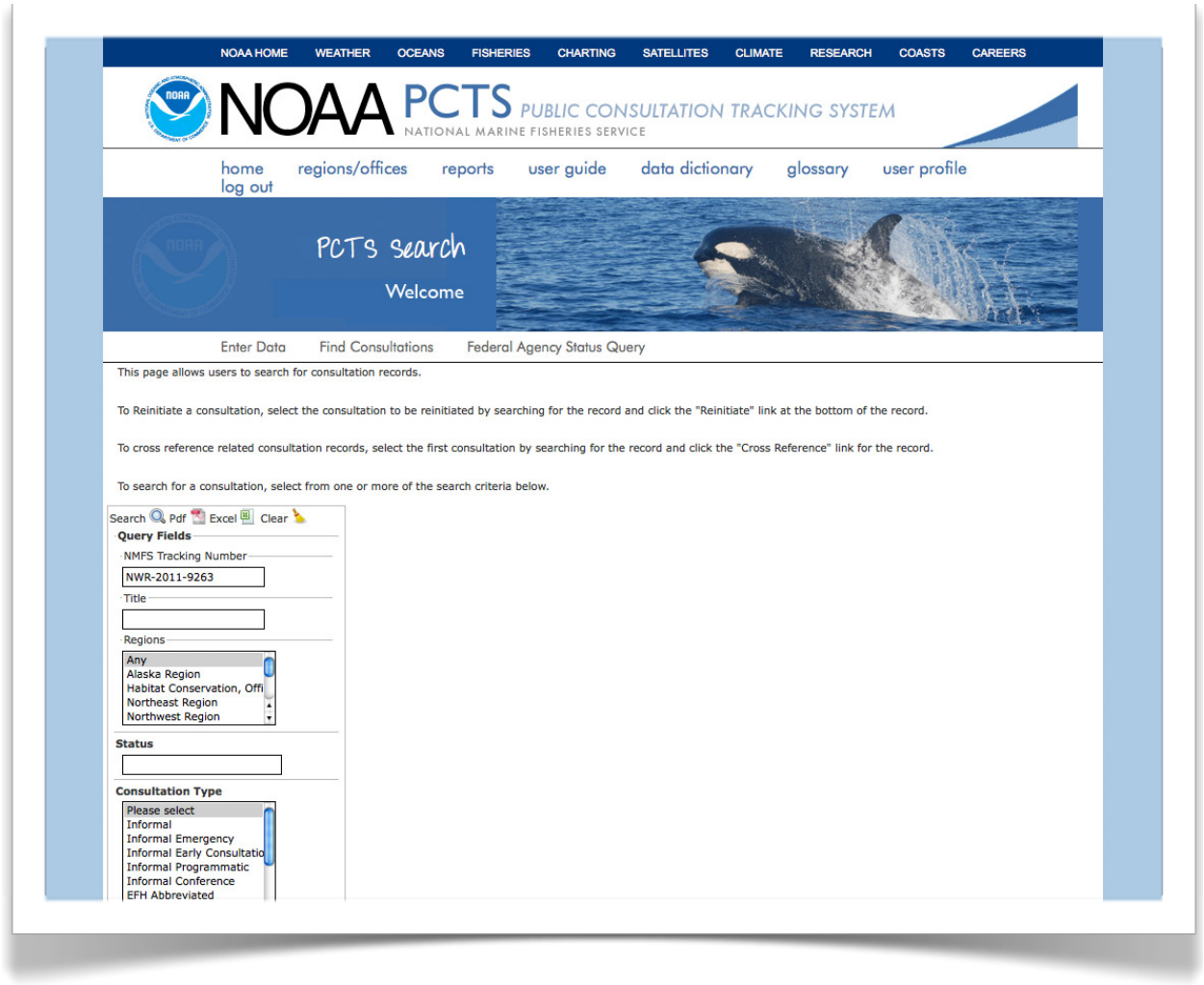


Figure 11.14: Search Page for Enter Data Actions

The results from the search can be sorted by NMFS Tracking Number, Title, or Region in both ascending or descending order (Figure 11.15). In addition, there are actions on the left of each Tracking Number that allows the user easy access to Cross Reference, Reinitiate, or Edit the desired consultation without having to pull up the entire record first. Once a consultation has been created, the user is also able to attach documents to the consultation (Figure 11.16).

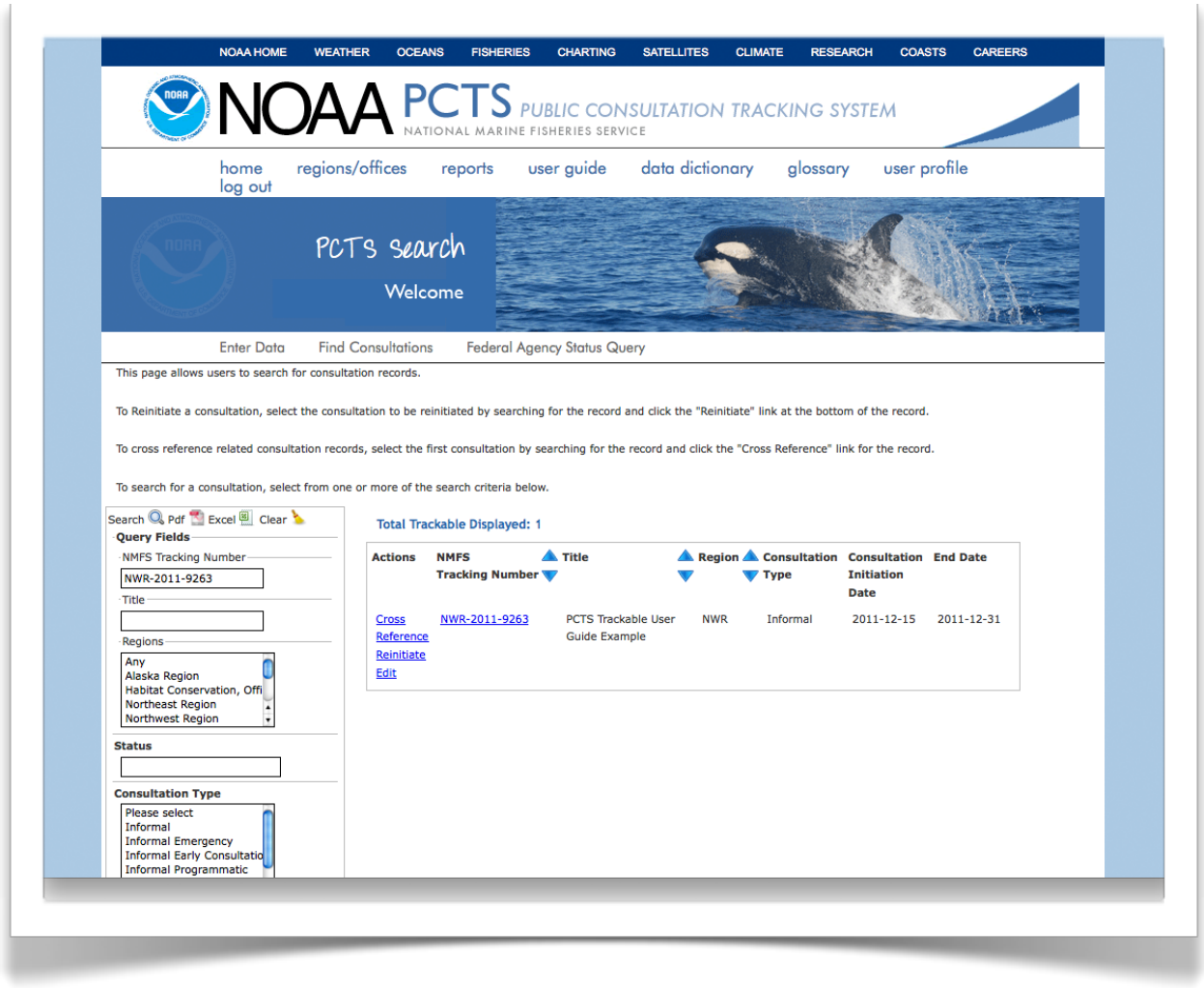


Figure 11.15: Search Results for Editing or Updating a Consultation

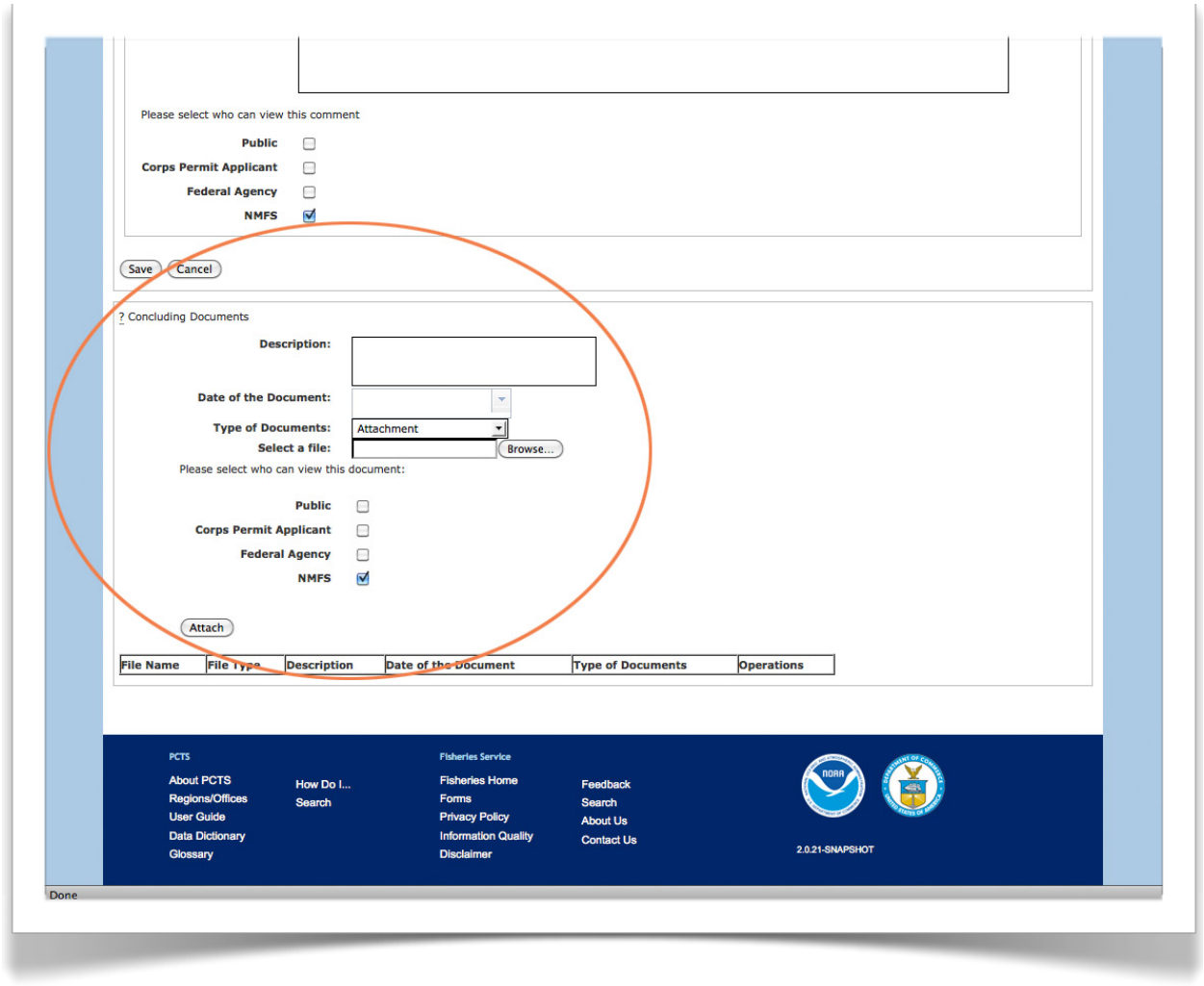


Figure 11.16: Attaching a Document in the Edit Page

11.3.3 Reinitiate Consultation

To reinitiate a consultation or create a new consultation based on a previous one, the user can choose the Reinitiate a Consultation link located on the Enter Data Page (Figure 11.3.) A search page will be displayed (Figure 11.14), and the user can enter in the input fields to locate the correct consultation.

The results from the search can be sorted by NMFS Tracking Number, Title, or Region in both ascending or descending order. Once the desired consultation is located, the user can click on the Reinitiate link next to the chosen NMFS Tracking Number (Figure 11.17). This allows the user to reinitiate the consultation without having to pull up the entire record first.

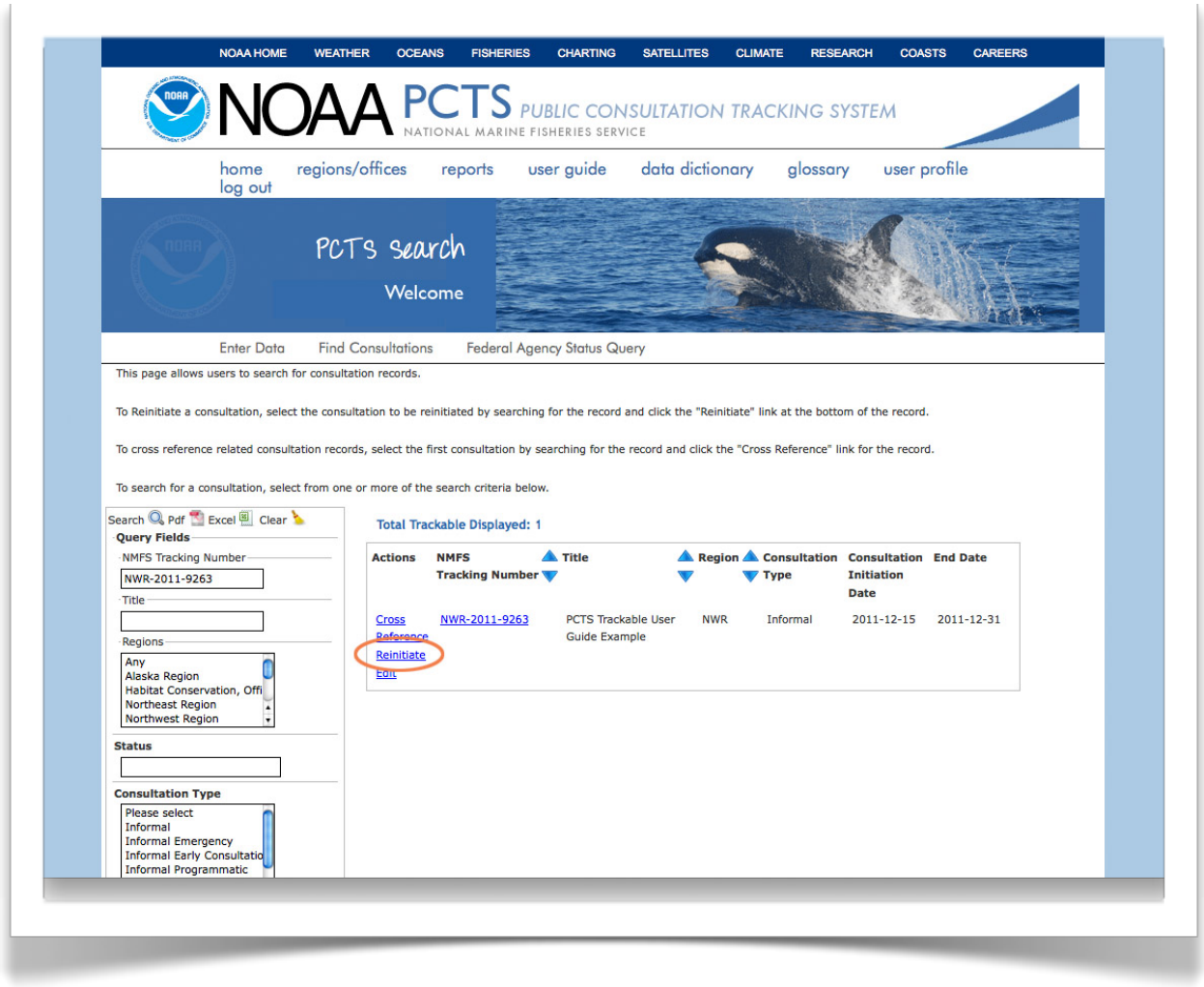


Figure 11.17: Search Results for Reinitiating a Consultation

After a consultation has been selected to be reinitiated, the user will need to select a consultation type to begin for the original consultation (Figure 11.18). The user will then be able to enter in the necessary information and a confirmation page will be displayed with a new NMFS Tracking Number.

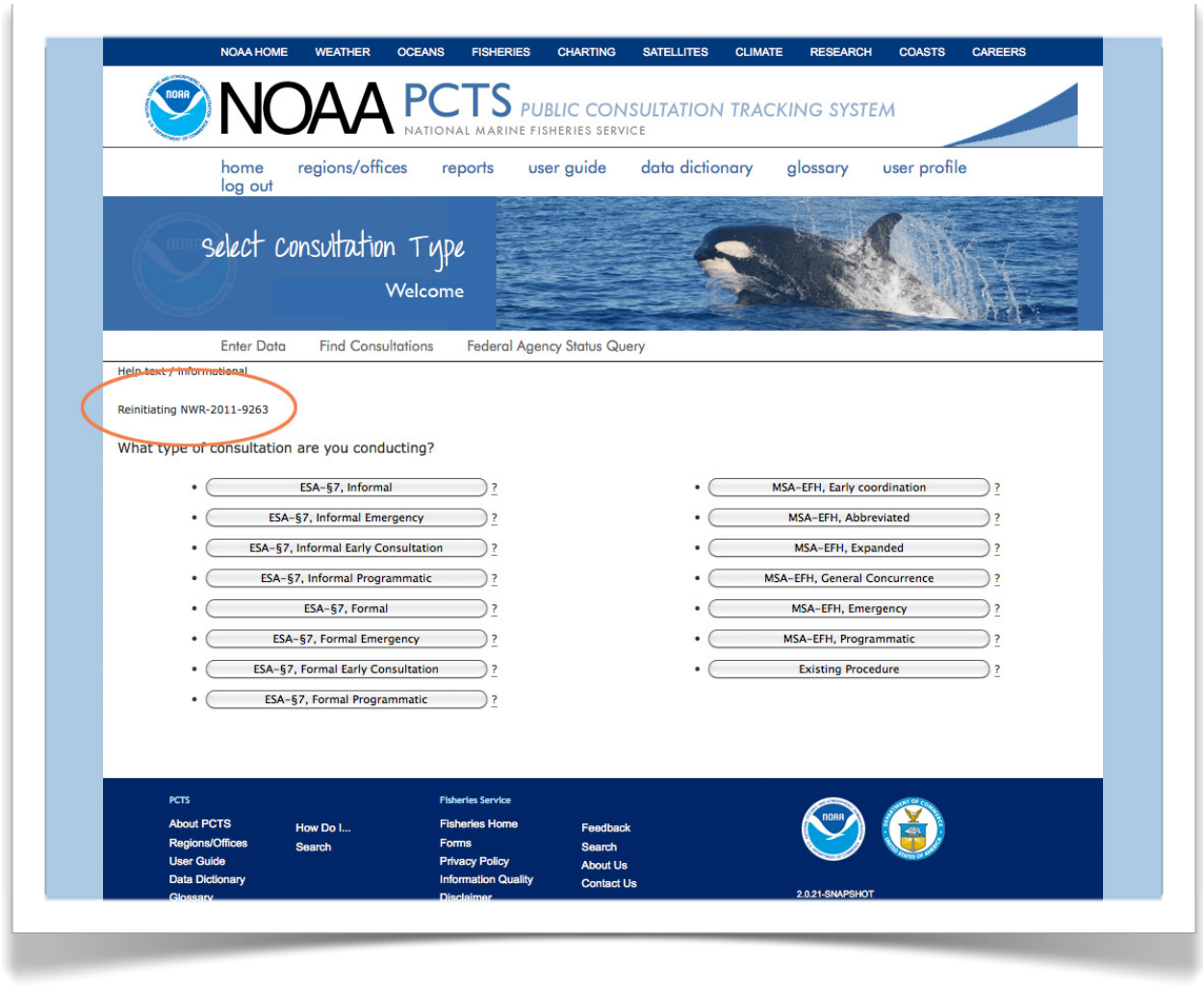


Figure 11.18: Select Consultation for Reinitiation

When the new NMFS Tracking Number is selected, a summary is displayed that shows a new NMFS Tracking Number (Figure 11.19a) that links both the original consultation and the consultation that has been reinitiated as "Children" under the new tracking number (Figure 11.19b). In addition, at the bottom of the summary, the original consultation is cross-referenced as well (Figure 11.19c).

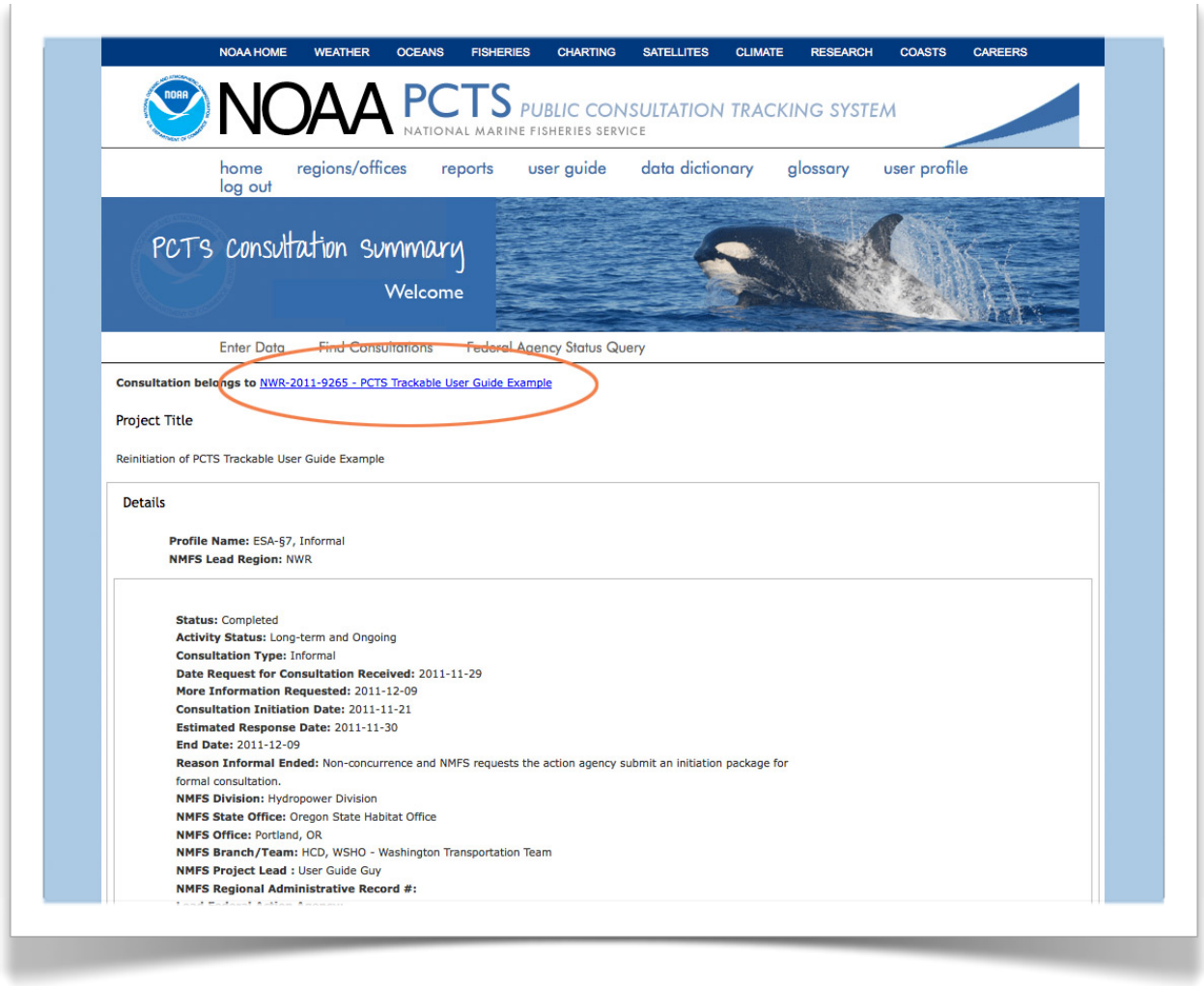


Figure 11.19a: Reinitiating a Consultation Project Summary

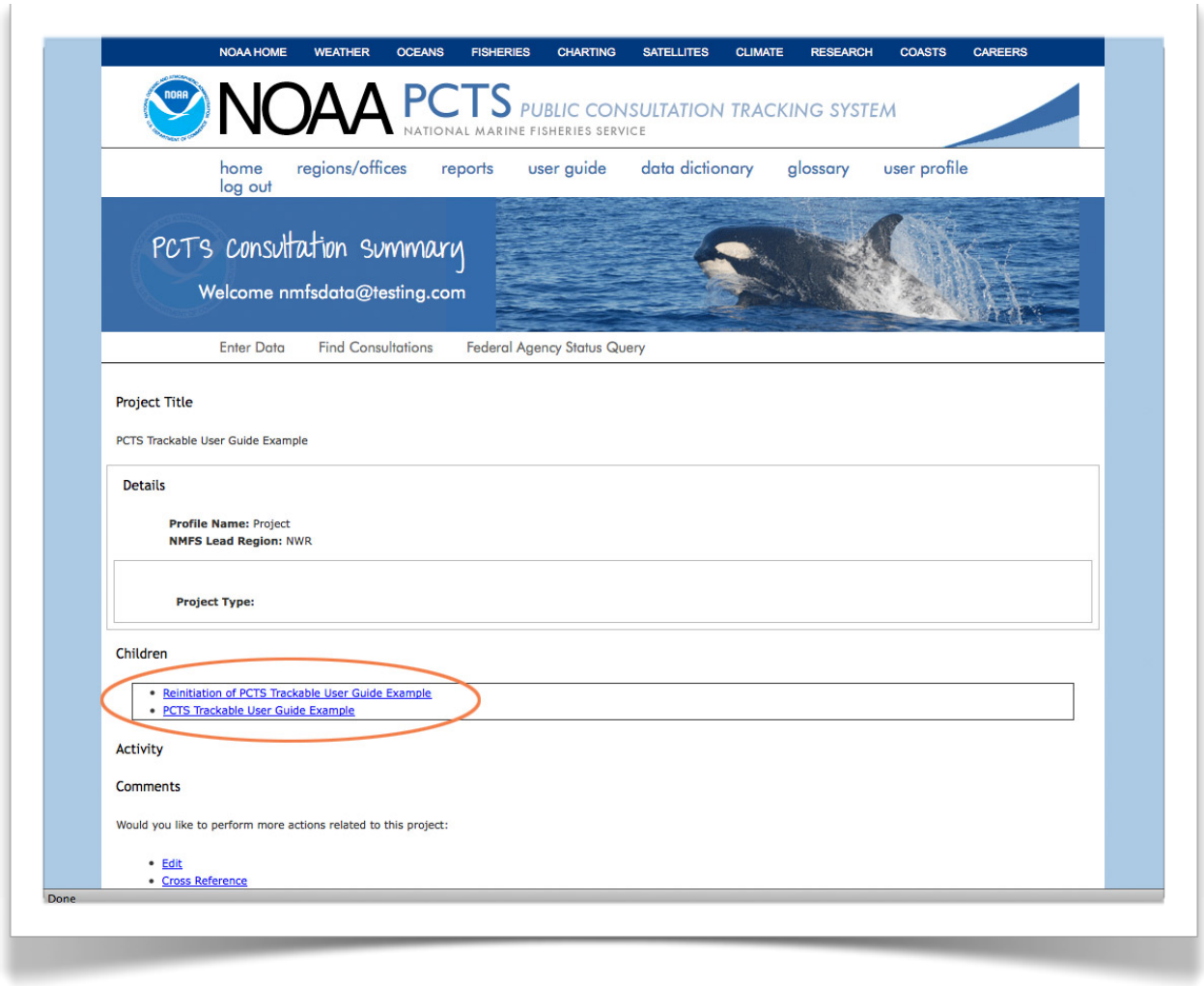


Figure 11.19b: Reinitiating a Consultation Project Summary

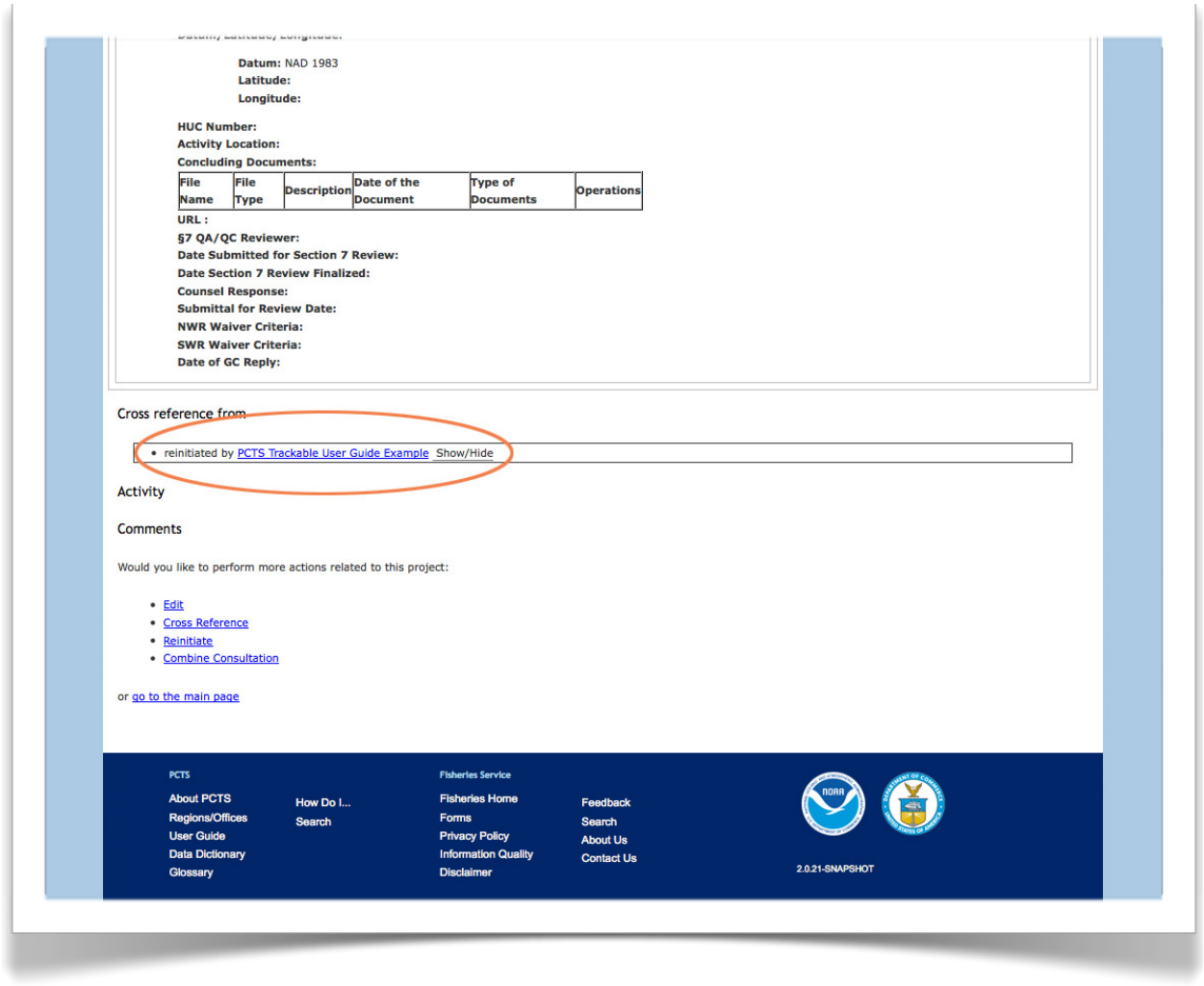


Figure 11.19c: Reinitiating a Consultation Project Summary

11.3.4 Cross Reference Consultation

To cross reference a consultation, the user can choose the Cross Reference a Consultation link located on the Enter Data Page (Figure 11.3.) A search page will be displayed (Figure 11.14), and the user can enter in the input fields to locate the correct consultation.

The results from the search can be sorted by NMFS Tracking Number, Title, or Region in both ascending or descending order. Once the desired consultation is located, the user can click on the Cross Reference link next to the chosen NMFS Tracking Number (Figure 11.20). This allows the user to cross reference the consultation without having to pull up the entire record first.

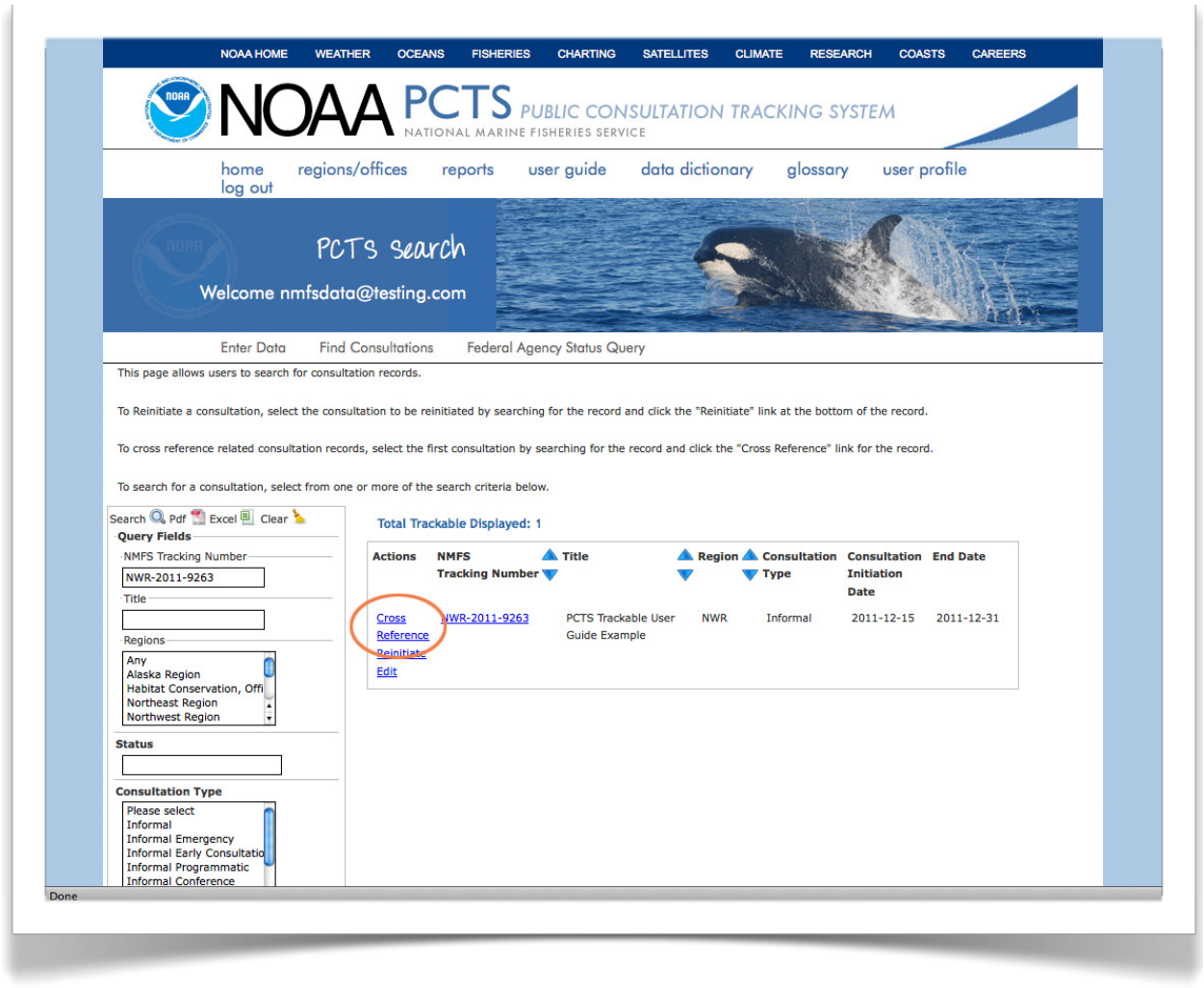


Figure 11.20: Search Results for Cross Referencing a Consultation

Once a consultation has been selected (Figure 11.21), the user is able to cross reference consultations. The results from the search can be sorted by NMFS Tracking Number, Title, or Region in both ascending or descending order. Once the desired consultation is located and selected, the user can click on the Cross Reference button at the top of the page (Figure 11.22). The consultation selected for cross reference can now be seen in the original consultation (Figure 11.23).

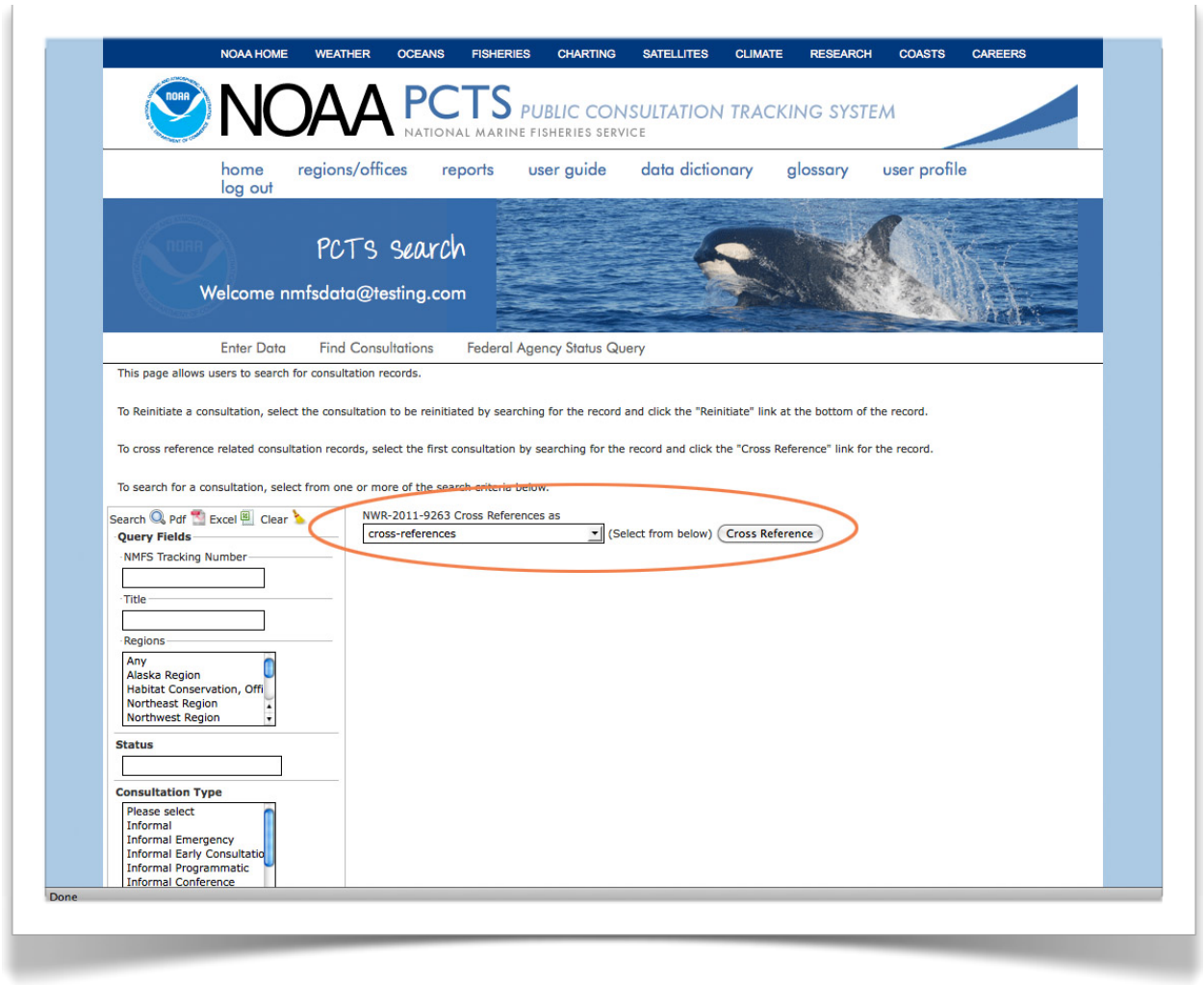


Figure 11.21: Cross Referencing a Consultation

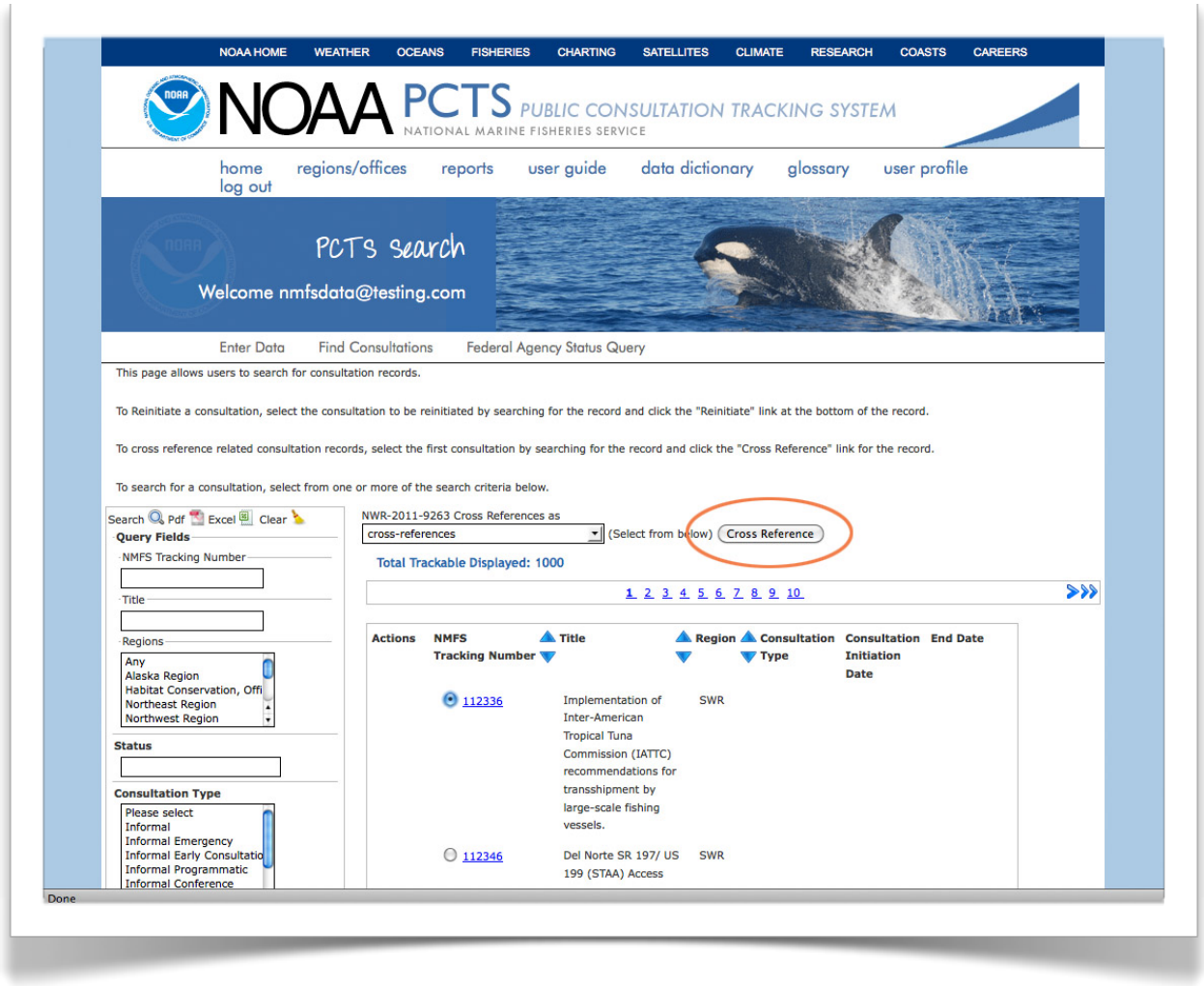


Figure 11.22: Cross Referencing a Consultation

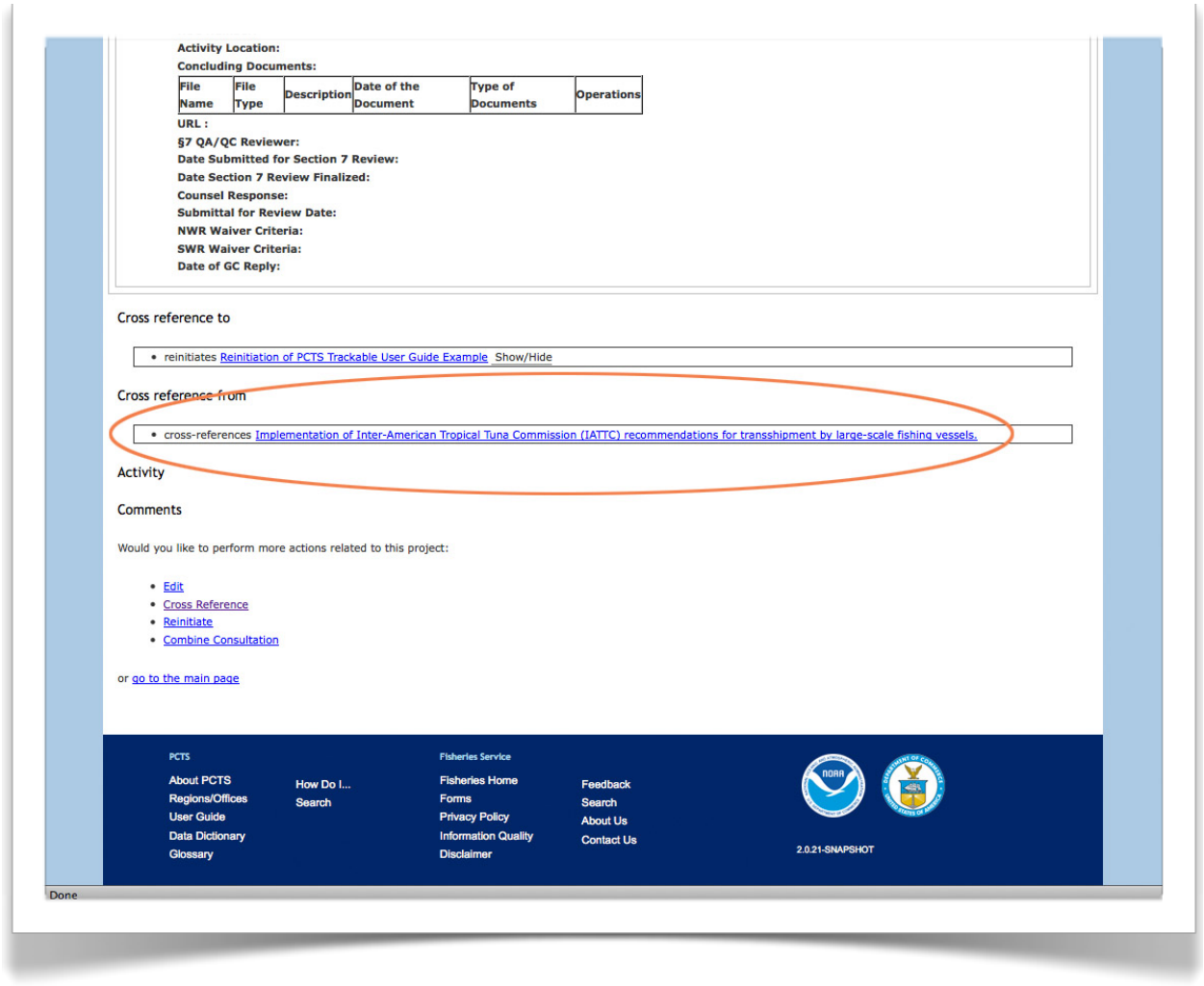


Figure 11.23: Cross Referencing a Consultation Added to Original Consultation

12. NMFS Admin

Depending on the permissions set for each individual, the NMFS admin user has the ability to utilize full privileges within the application. This will provide the admin user access to make changes to consultations in the Enter Data section as described above. With full permissions set, an admin user is also able to view and edit profiles, users, and regions within PCTS. Please note that even though an admin user may belong to the NMFS Data Entry group, it does not necessarily mean that this particular admin user has full privileges. Privileges are granted within individual permissions, not group settings.

Figure 11.24: NMFS Admin Home Page

12.1 Profiles

Not to be confused with the User Profile feature (Figure 1.2), the List Profile Page (Figure 12.1) allows an admin user to add a new profile or edit an existing profile. The admin user is able to view existing profiles and sort them by Profile Name, Region, and Last Modified Date by both ascending and descending order.

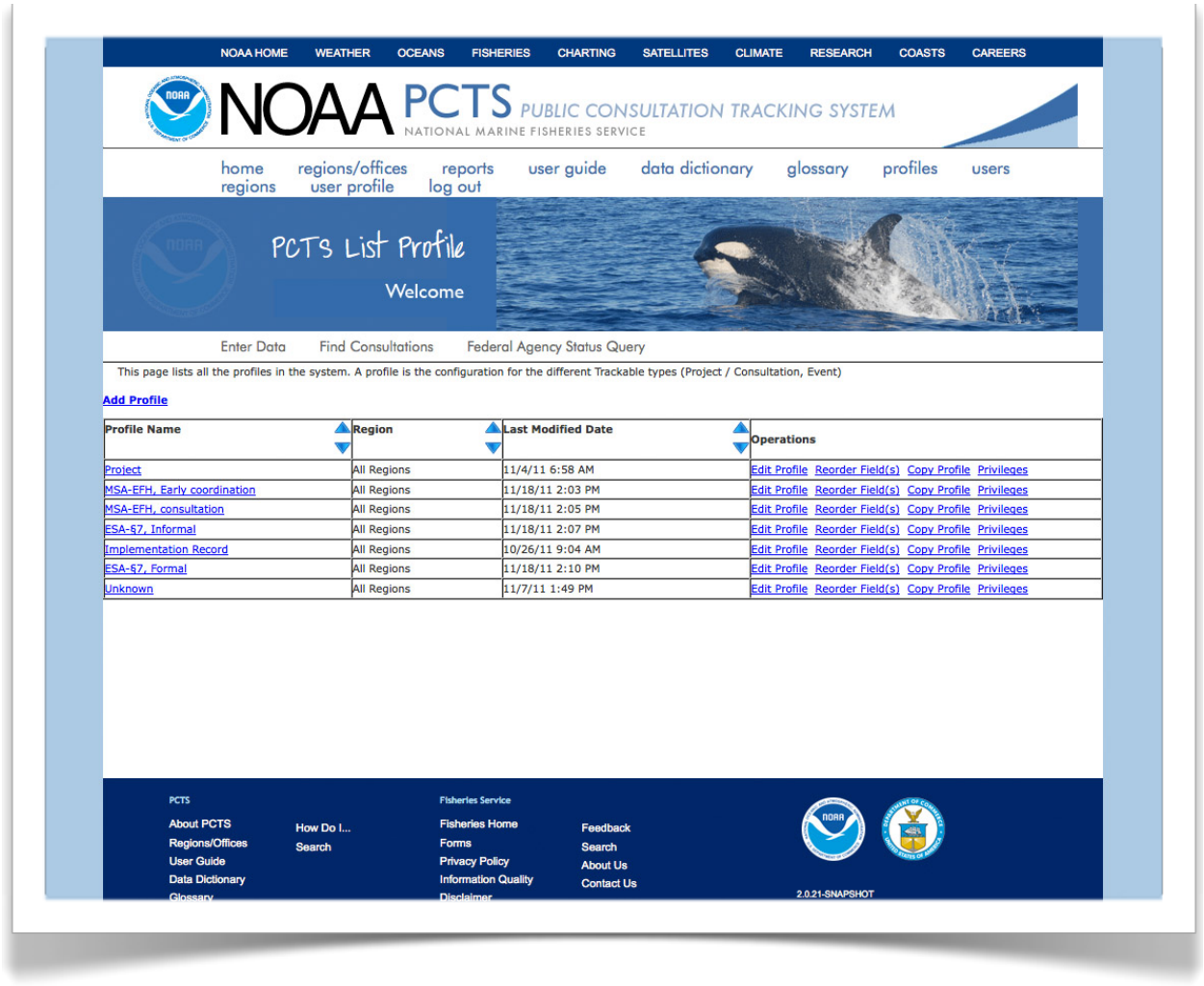


Figure 12.1: List Profile Page

12.1.1 Operations

In the list profile, the admin user is able to manage each profile by one of two way.s The first way is to select any of the quick edit links under the Operations section of the desired profile (Figure 12.2). The actions under the Operations section include the following: Edit Profile, Reorder Field(s), Copy Profile, and Privileges. The other option is to select the Profile Name and manage the Profile within the individual profile (see Manage Profile).

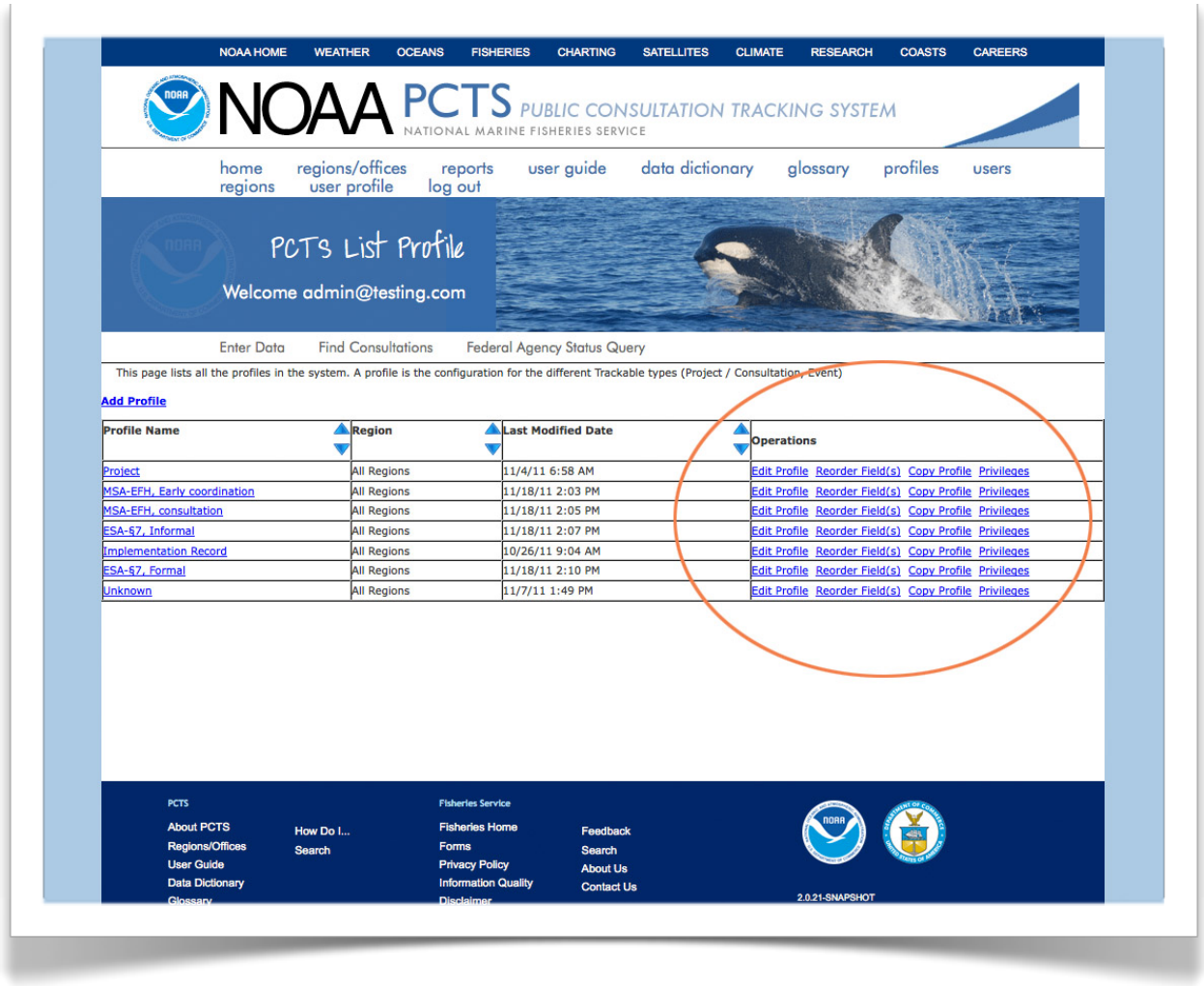


Figure 12.2: Operations

A. Edit Profile

This operation allows the admin user to edit the existing profile name and region.

B. Reorder Field(s)

This operations allows the user to reorder fields by using a drop down selection format. To reorder, number each field by selecting the desired number order for each field. There should be one number that corresponds to each existing field.

C. Copy Profile

This operation essentially allows the user to clone an existing Profile. The profile name, region, fields, field privileges, field references, and field orders will be the same. This operation is extremely useful when the admin user needs to create a Profile that is very similar to an existing one. After copying the profile, the user can then edit any fields where necessary.

D. Privileges

This operation allows the admin user to determine which user groups are able to edit, view, and/or search a specific profile. These privileges can be set by a checkbox next to each group under the specific action. Privileges can be set for Public, Corps Permit Applicant, Federal Agency, NMFS General, and NMFS Data Entry groups.

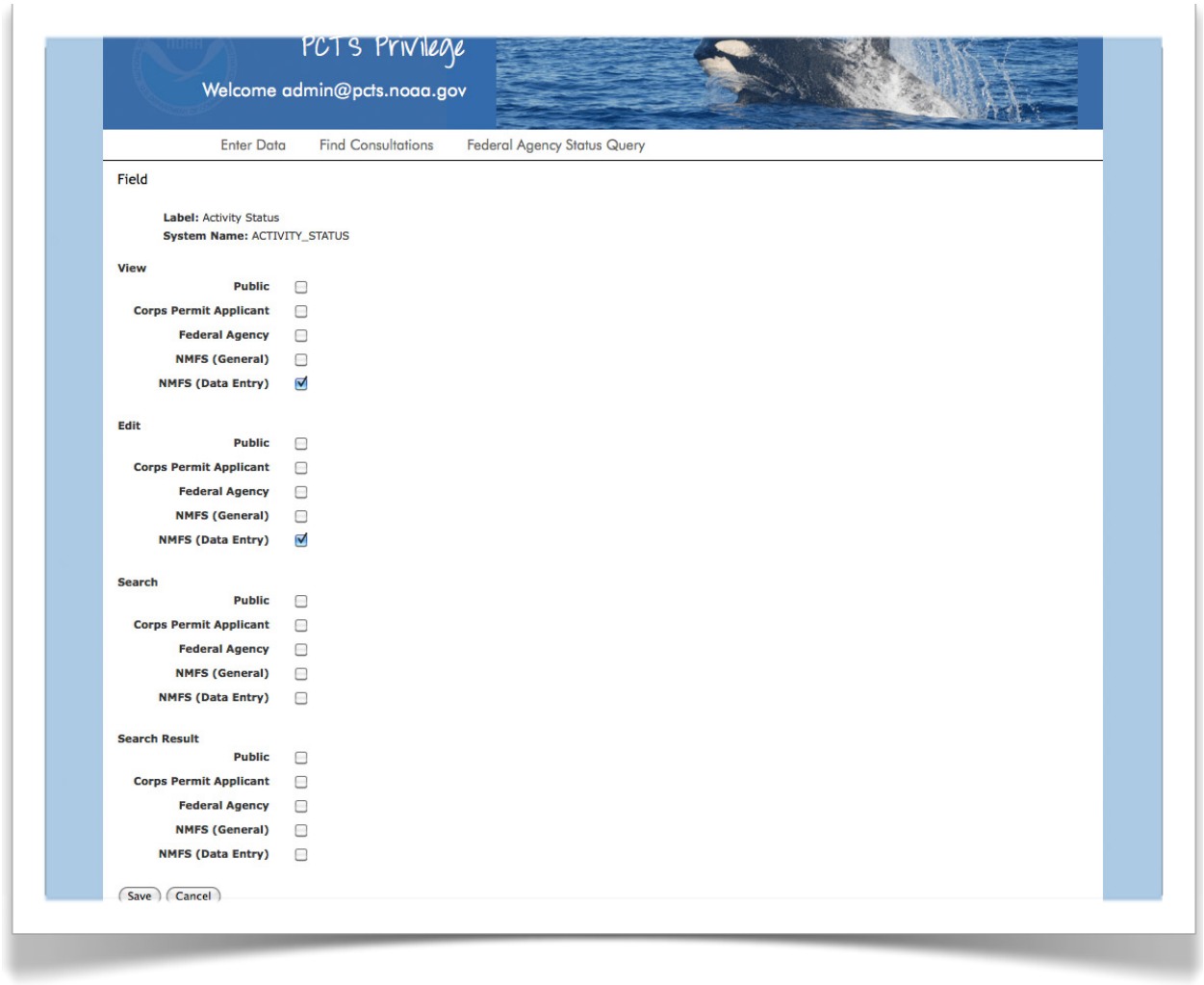


Figure 12.3: Privileges

12.1.2 Manage Profile

Clicking on a Profile Name takes the user to an individual profile page (Figure 12.4a). On this page, the user is able to edit fields, add additional fields, and/or edit, delete, or change the privileges to each existing field. In addition, the actions listed in the 12.1.1 Operations section are also available to the admin user at the bottom of each profile page (Figure 12.4b). When the admin user is ready, the profile can be saved (or canceled), and the admin user can return to the home page.

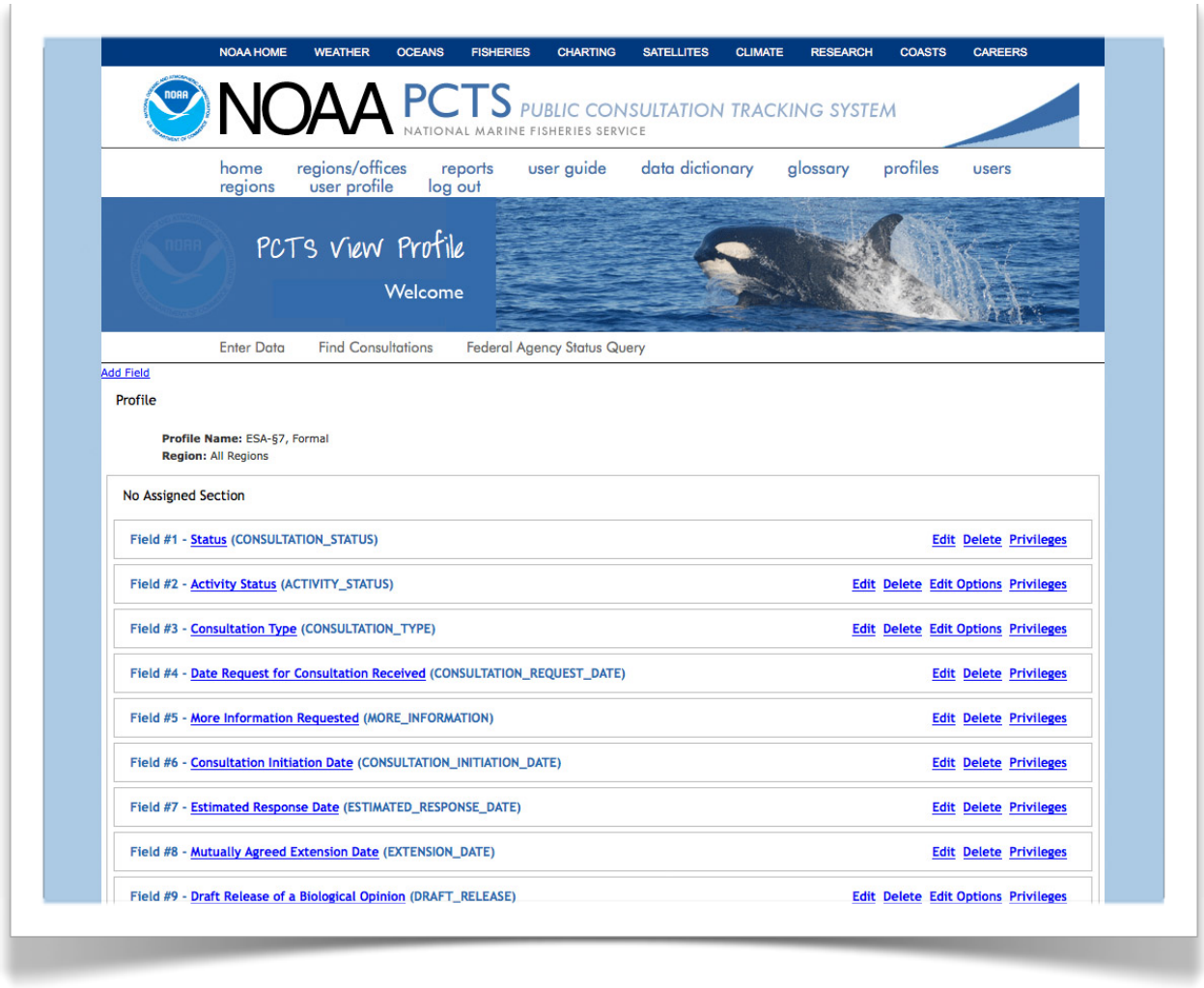


Figure 12.4a: Individual Profile Page

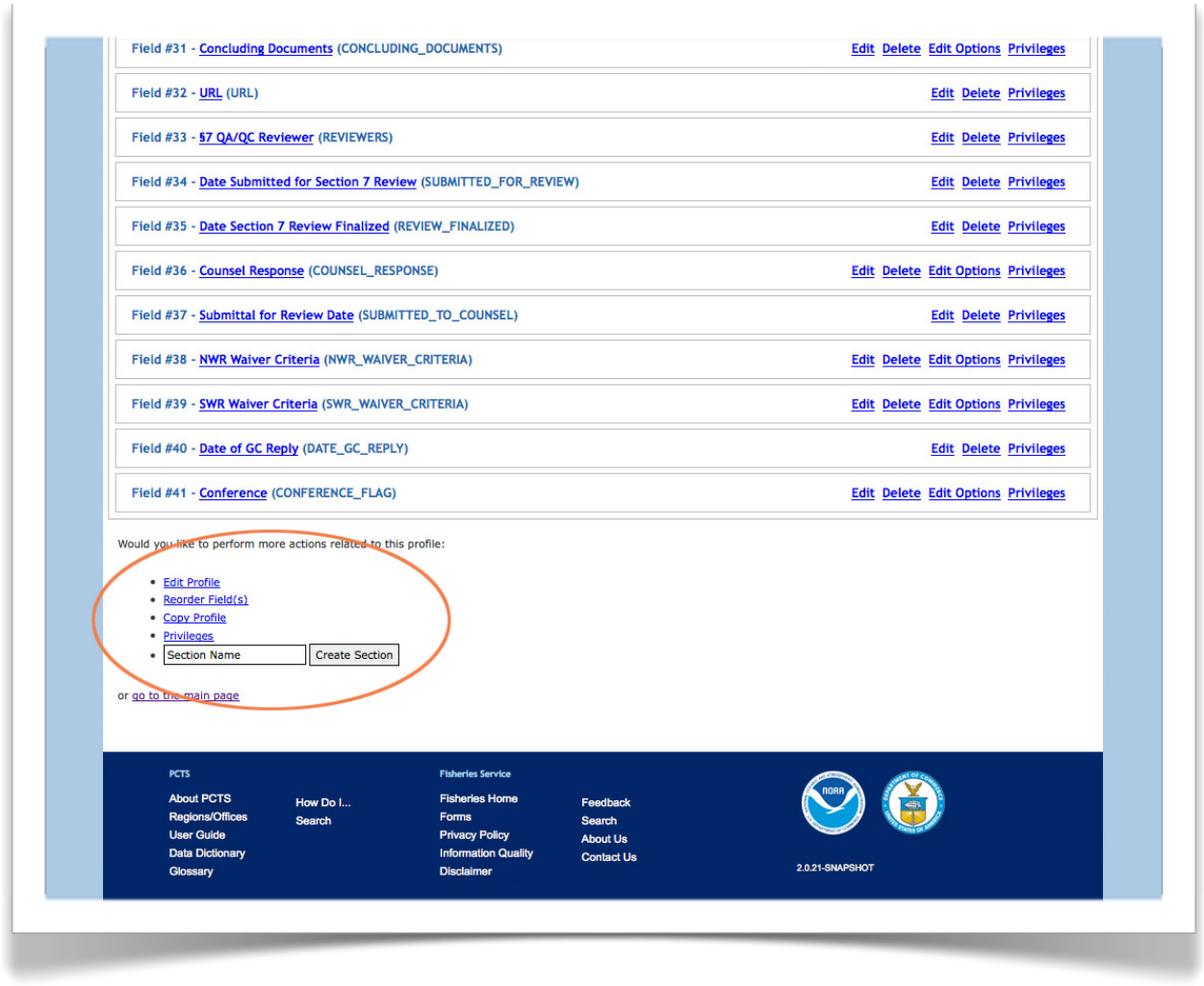


Figure 12.4b: Individual Profile Page

A. Edit

On the Edit Page (Figure 12.5), the admin user is able to modify several fields, including the System Name, Label, Default Value, and Description.

Figure 12.5: Edit Page

B. Delete

The admin user is able to delete any field with one click of the "Delete" link. This operation is not reversible so the admin user must be absolutely certain of the field status when deleting.

C. Edit Options

The selections under "Edit Option" are specific to the profile chosen. In other words, the admin user is able to add or edit field options within each profile. Existing field options can be moved up or down based on priority level, activated, or inactivated. These field options can also be modified by selecting "Edit" in the Operations section. New Field Options can be added as well. The admin user can continue to edit or add additional field options by saving after each operation. Clicking "Done" will take the admin user back to the Individual Profile Page (Figure 12.6).

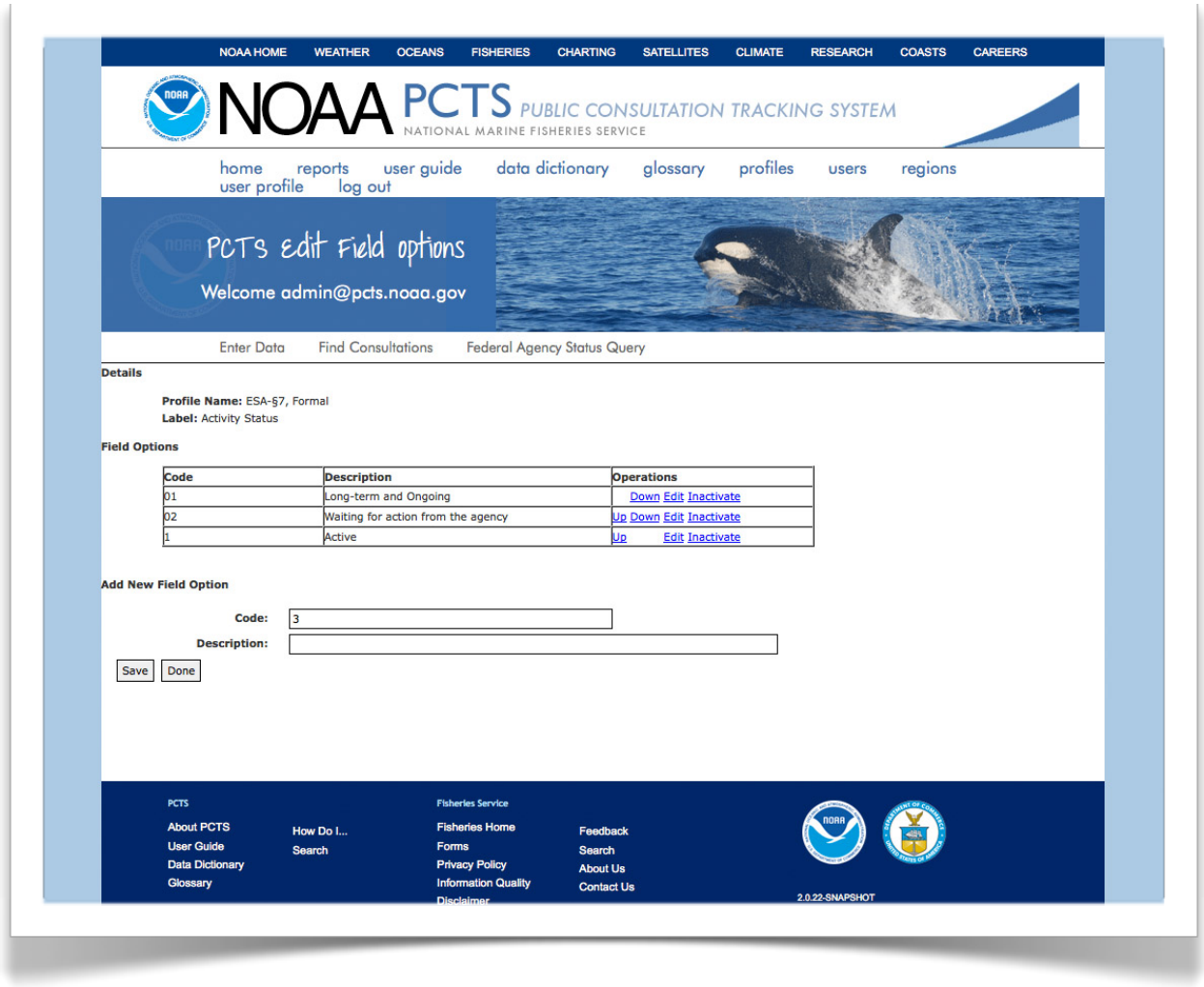
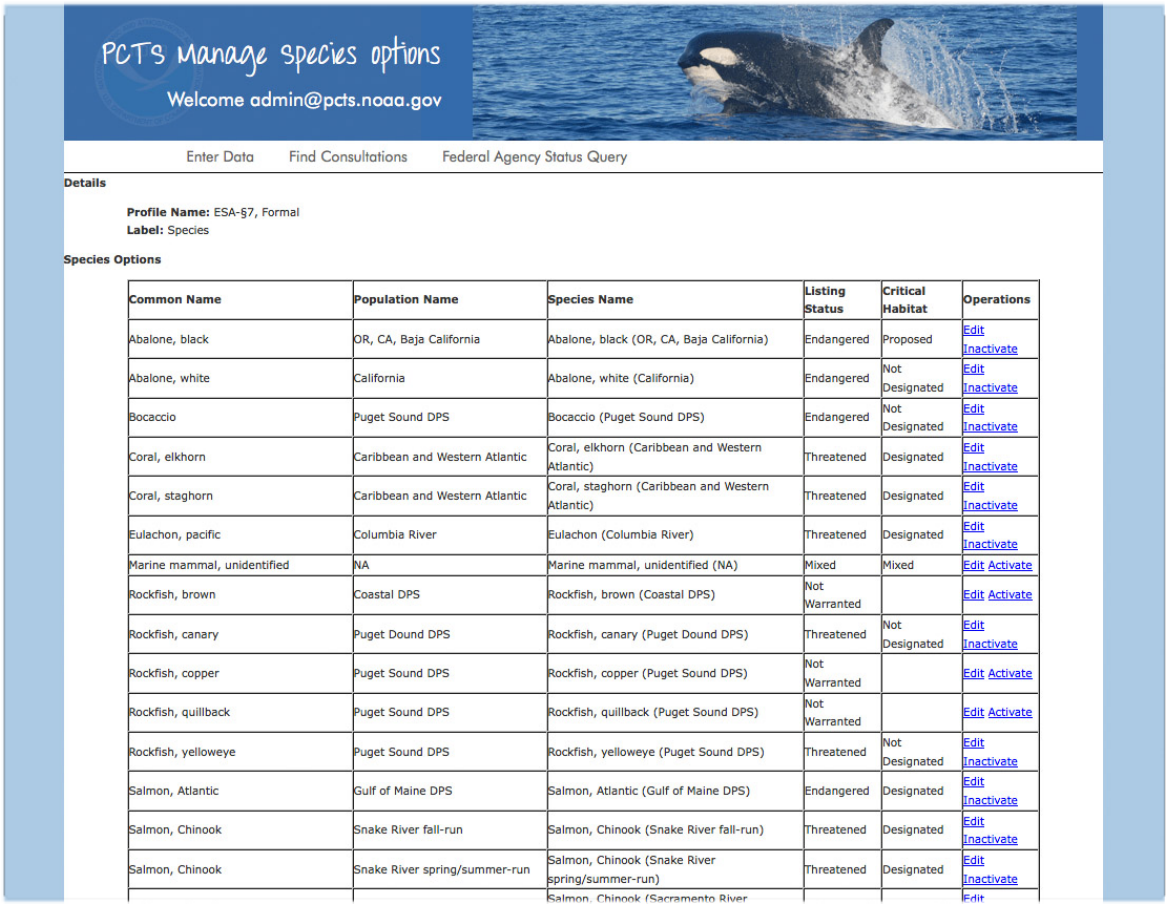


Figure 12.6: Edit Options Page

D. Edit Global Options

Global Options are unique in that the selections are linked across all profiles. Once the admin user modifies a global option, the change will be updated for every instance that global option occurs. For example (Figure 12.7), by selecting "Edit Global Options" for Species, the admin user is able to edit, activate, or inactivate all instances that reference "Species" (Figure 12.8). In other words, if "Abalone, black" is updated to "Abalone, all", then every instance of "Abalone, black" will be changed to "Abalone, all".

Figure 12.7: Edit Global Options Page



PCTS Manage Species options

Welcome admin@pcts.noaa.gov

Enter Data Find Consultations Federal Agency Status Query

Details

Profile Name: ESA-§7, Formal
Label: Species

Species Options

Common Name	Population Name	Species Name	Listing Status	Critical Habitat	Operations
Abalone, black	OR, CA, Baja California	Abalone, black (OR, CA, Baja California)	Endangered	Proposed	Edit Inactivate
Abalone, white	California	Abalone, white (California)	Endangered	Not Designated	Edit Inactivate
Bocaccio	Puget Sound DPS	Bocaccio (Puget Sound DPS)	Endangered	Not Designated	Edit Inactivate
Coral, elkhorn	Caribbean and Western Atlantic	Coral, elkhorn (Caribbean and Western Atlantic)	Threatened	Designated	Edit Inactivate
Coral, staghorn	Caribbean and Western Atlantic	Coral, staghorn (Caribbean and Western Atlantic)	Threatened	Designated	Edit Inactivate
Eulachon, pacific	Columbia River	Eulachon (Columbia River)	Threatened	Designated	Edit Inactivate
Marine mammal, unidentified	NA	Marine mammal, unidentified (NA)	Mixed	Mixed	Edit Activate
Rockfish, brown	Coastal DPS	Rockfish, brown (Coastal DPS)	Not Warranted		Edit Activate
Rockfish, canary	Puget Dound DPS	Rockfish, canary (Puget Dound DPS)	Threatened	Not Designated	Edit Inactivate
Rockfish, copper	Puget Sound DPS	Rockfish, copper (Puget Sound DPS)	Not Warranted		Edit Activate
Rockfish, quillback	Puget Sound DPS	Rockfish, quillback (Puget Sound DPS)	Not Warranted		Edit Activate
Rockfish, yelloweye	Puget Sound DPS	Rockfish, yelloweye (Puget Sound DPS)	Threatened	Not Designated	Edit Inactivate
Salmon, Atlantic	Gulf of Maine DPS	Salmon, Atlantic (Gulf of Maine DPS)	Endangered	Designated	Edit Inactivate
Salmon, Chinook	Snake River fall-run	Salmon, Chinook (Snake River fall-run)	Threatened	Designated	Edit Inactivate
Salmon, Chinook	Snake River spring/summer-run	Salmon, Chinook (Snake River spring/summer-run)	Threatened	Designated	Edit Inactivate
		Salmon, Chinook (Sacramento River			Edit

Figure 12.8: Edit Global Options - Species Page

E. Privileges

This operation allows the admin user to determine which user groups are able to edit, view, and/or search a specific profile. These privileges can be set by a checkbox next to each group under the specific action. Privileges can be set for Public, Corps Permit Applicant, Federal Agency, NMFS General, and NMFS Data Entry groups. (See Figure 12.3.)

F. Add Field

The admin user can add additional fields by clicking on the "Add Field" link on the top left of the Individual Profile Page. Once the fields have been completed, the new field for the consultation will be added when the admin user selects "Save".

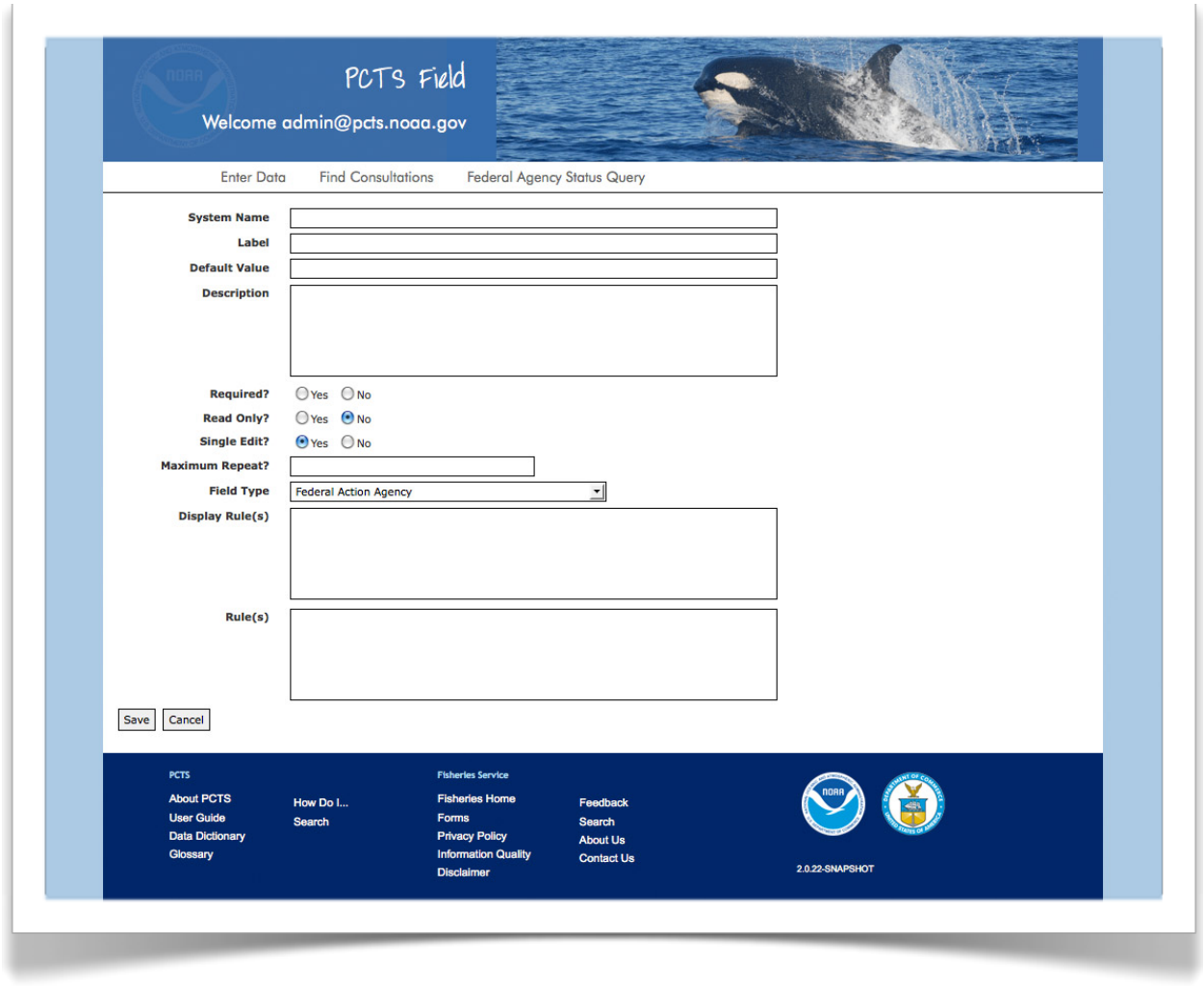


Figure 12.9: Add Field Page

G. Expanded View

The admin user is also able to click on the field name to quickly view the details of each field (Figure 12.10). Likewise, once the field name has been expanded, the user is able to click on the field name again to close the expanded view.

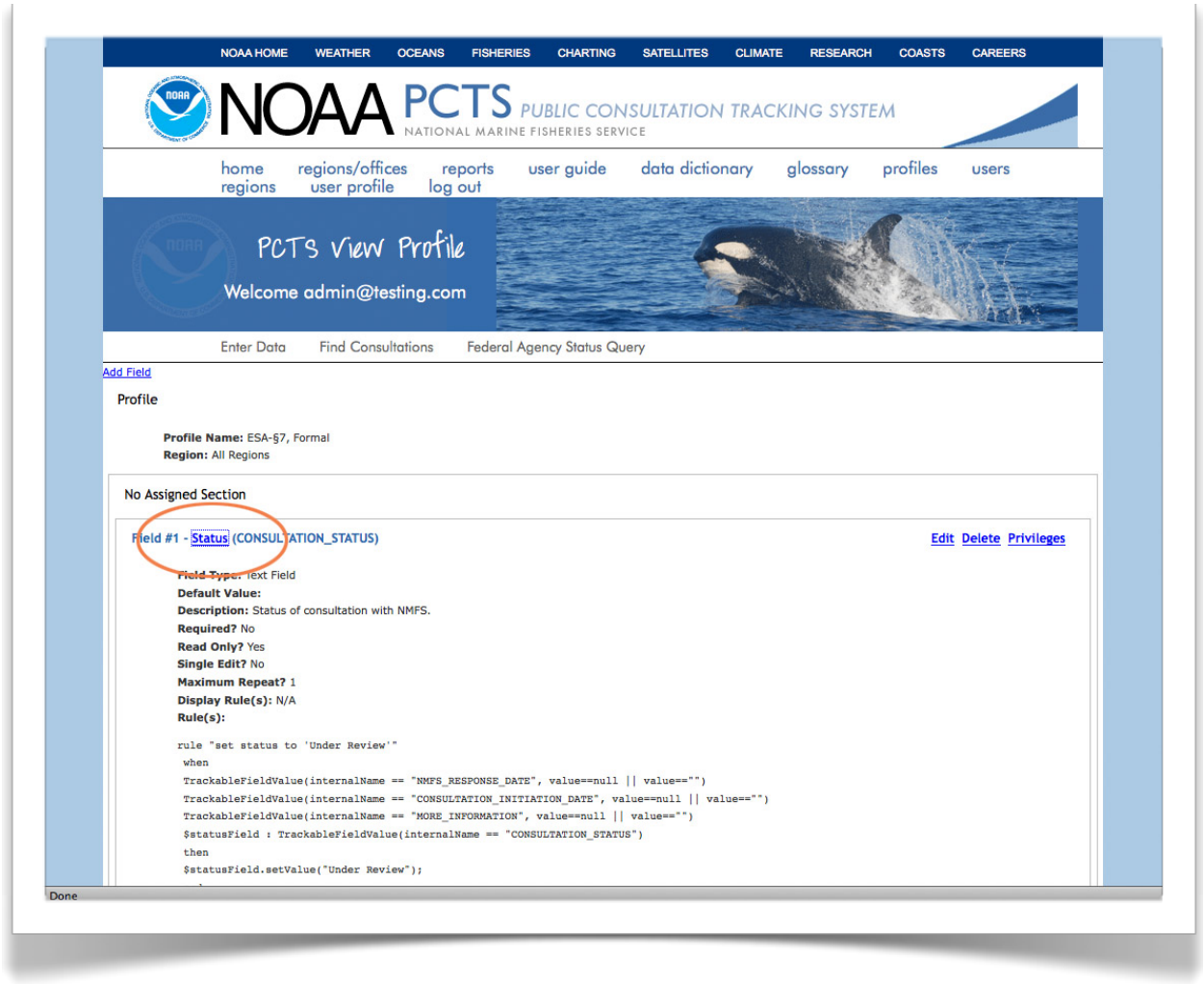


Figure 12.10: Field Quick View

12.1.3 Add Profile

To add a new profile, the admin user can click on the "Add Profile" link located at the top left of the Profile Page (Figure 12.11). The admin user can then input the Profile Name and the Region for the new Profile (Figure 12.12). A new field can be added by choosing the "Add a field" button. Each additional field can be added by selecting "Add another field" on the Add a Field Page (Figure 12.13). If needed, fields can be reordered by selecting the "Order field" link.

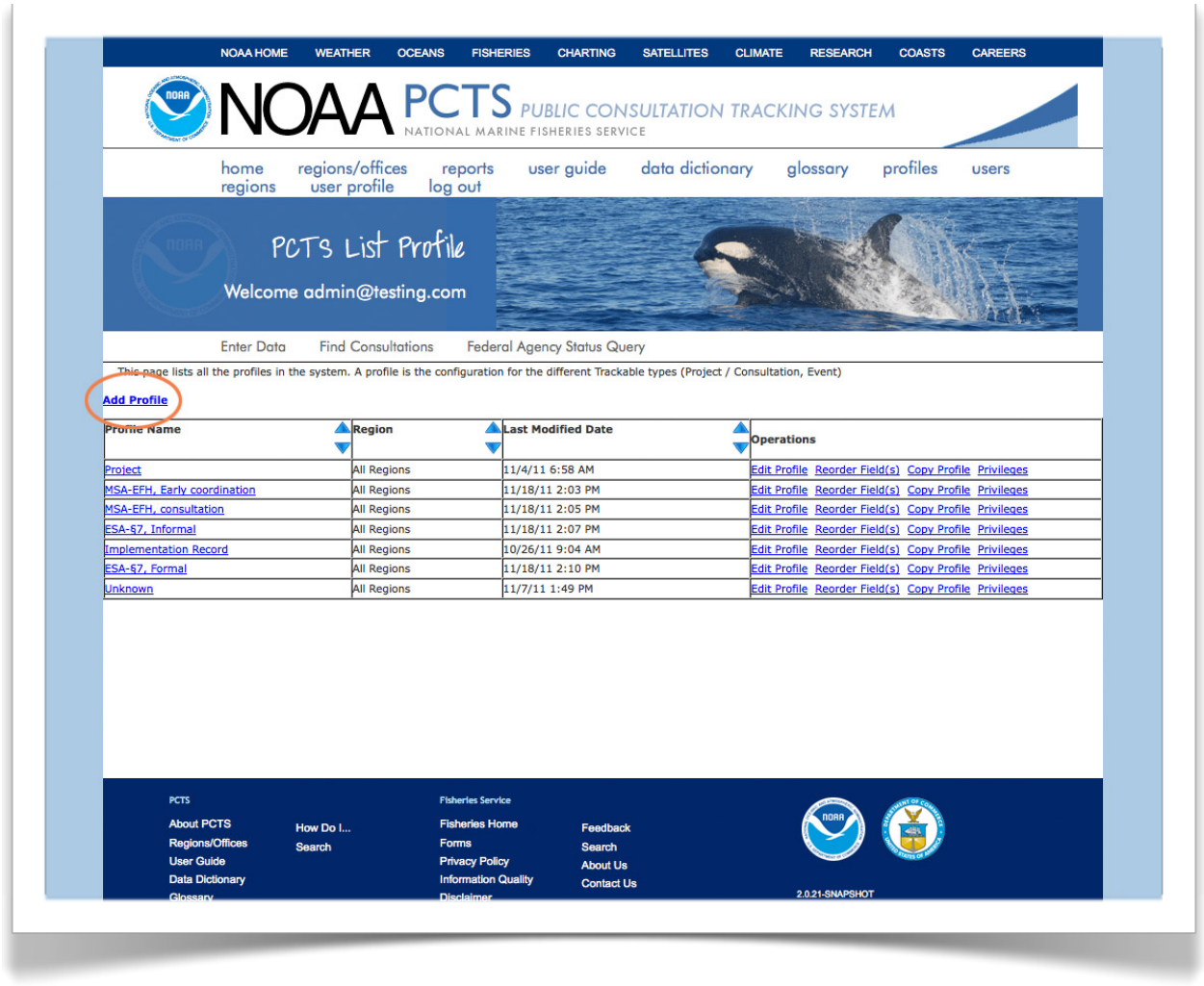


Figure 12.11:Add Profile Link

Figure 12.12: Add Profile Page

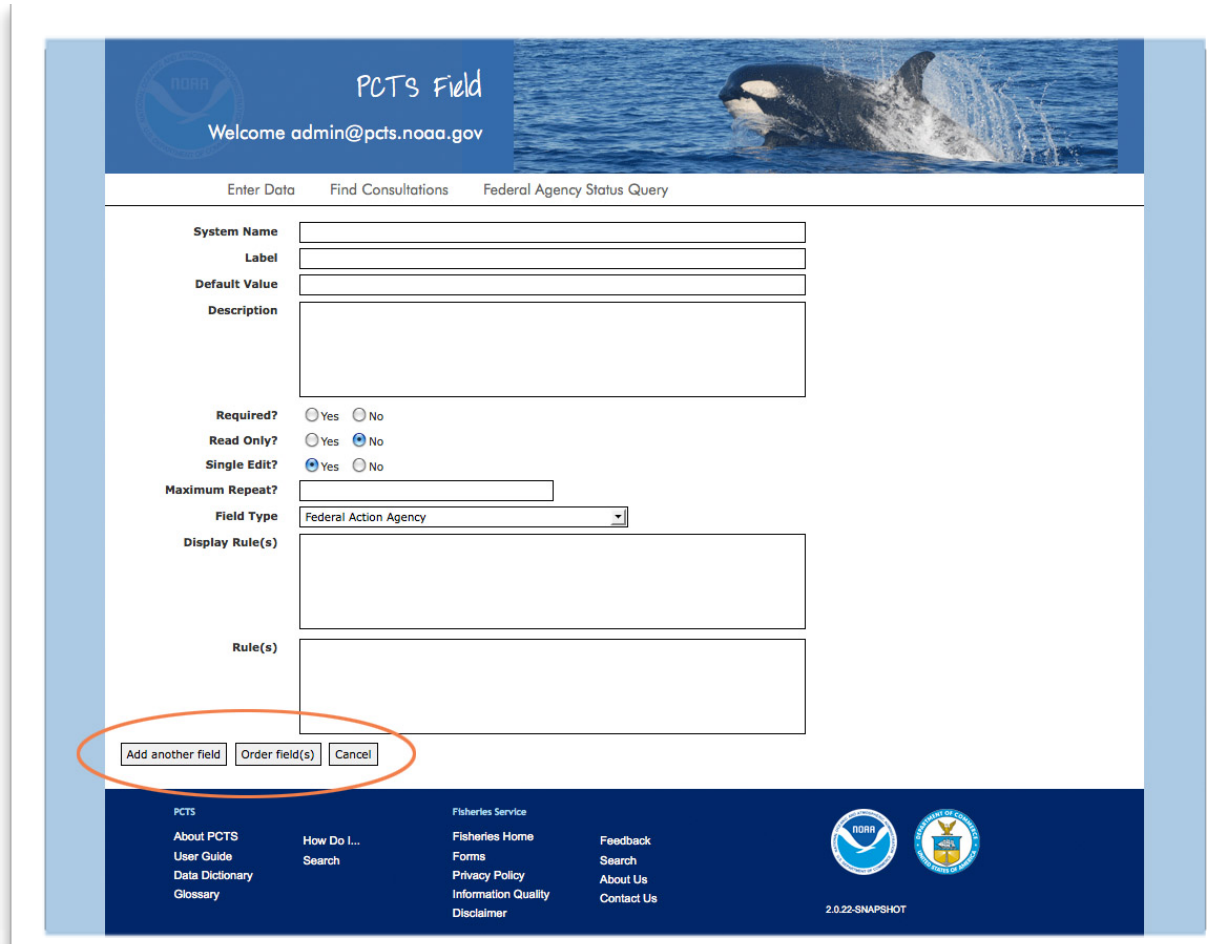


Figure 12.13: Add a Field Page

12.2 Users

The List User Page (Figure 12.14) allows the user to add a new user or modify existing users. The user list is displayed in a similar format as the query results. To navigate this page, the admin user can choose the single arrow for the next page or the double arrow for the last page. These arrows are located at the top right of the search results. Likewise, if you need to search previous pages, you can use the single or double arrows on the top left of the results page to search. In addition, the user can search by page number located at top middle of the search results. This list can be sorted by User Name or Full Name in both ascending or descending order.

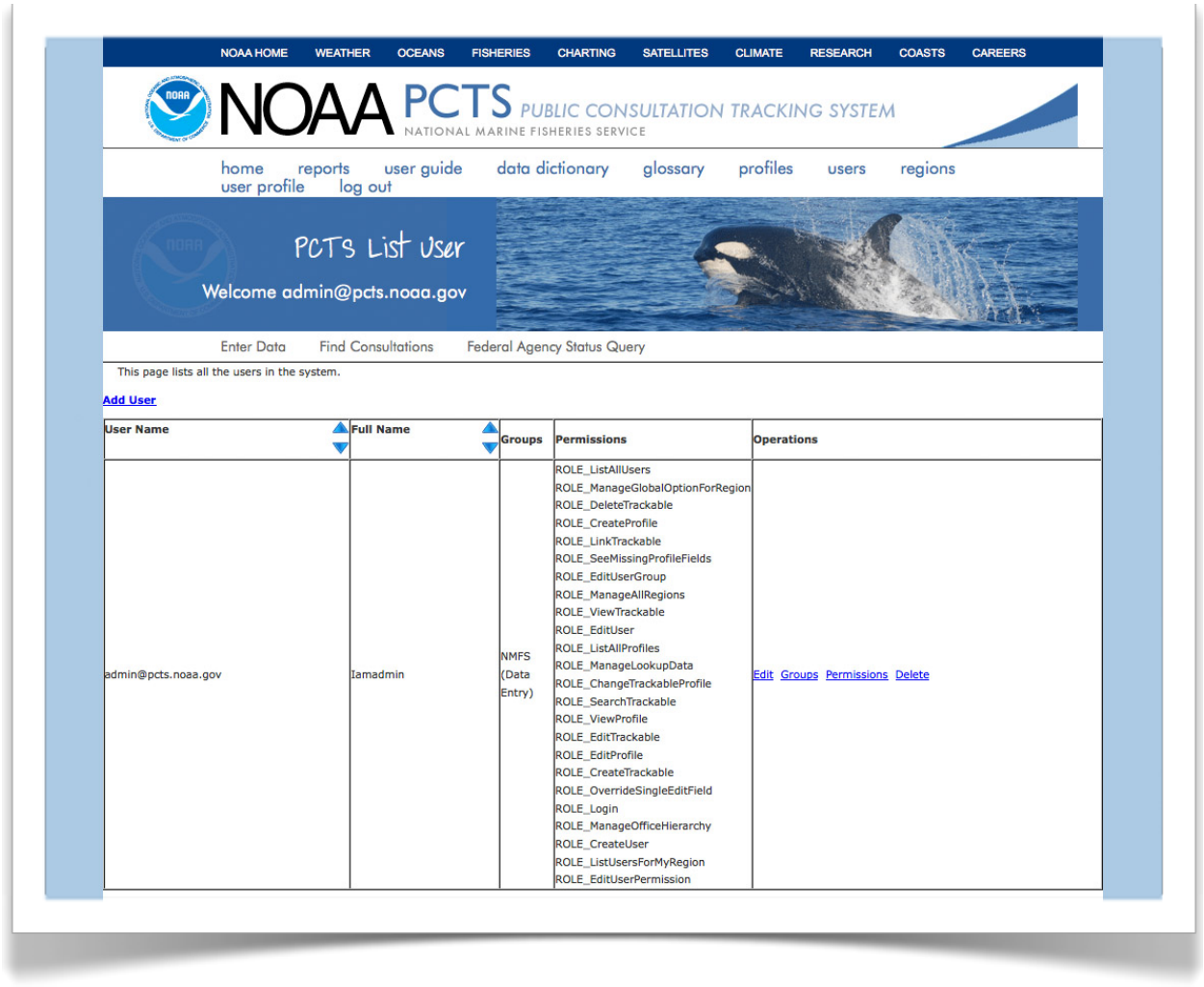


Figure 12.14: List User Page

12.2.1 Operations

For existing users, the admin user is able to edit the individual user information, determine which groups the user will belong to, decide which permissions the user will have, and/or delete the user.

A. Edit

Choosing the "Edit" option under the Operations section allows the admin user to modify the Full Name as well as the default region, division, state office, office, and/or branch team. The only field that is not editable is the Username as it is tied to the user's email address. The only way to change the username is to delete the user entirely and create a new one with the updated email address.

Figure 12.15: List User - Edit Page

B. Groups

The admin user can determine which groups an individual user can belong to by simply checking off the appropriate groups on the Groups Page (Figure 12.16).

Figure 12.16: List User - Groups Page

C. Permissions

The admin user can determine which permissions each user will possess by checking off which roles the user will have. For the purpose of ease, the "Check All" check box will select all options for the user.

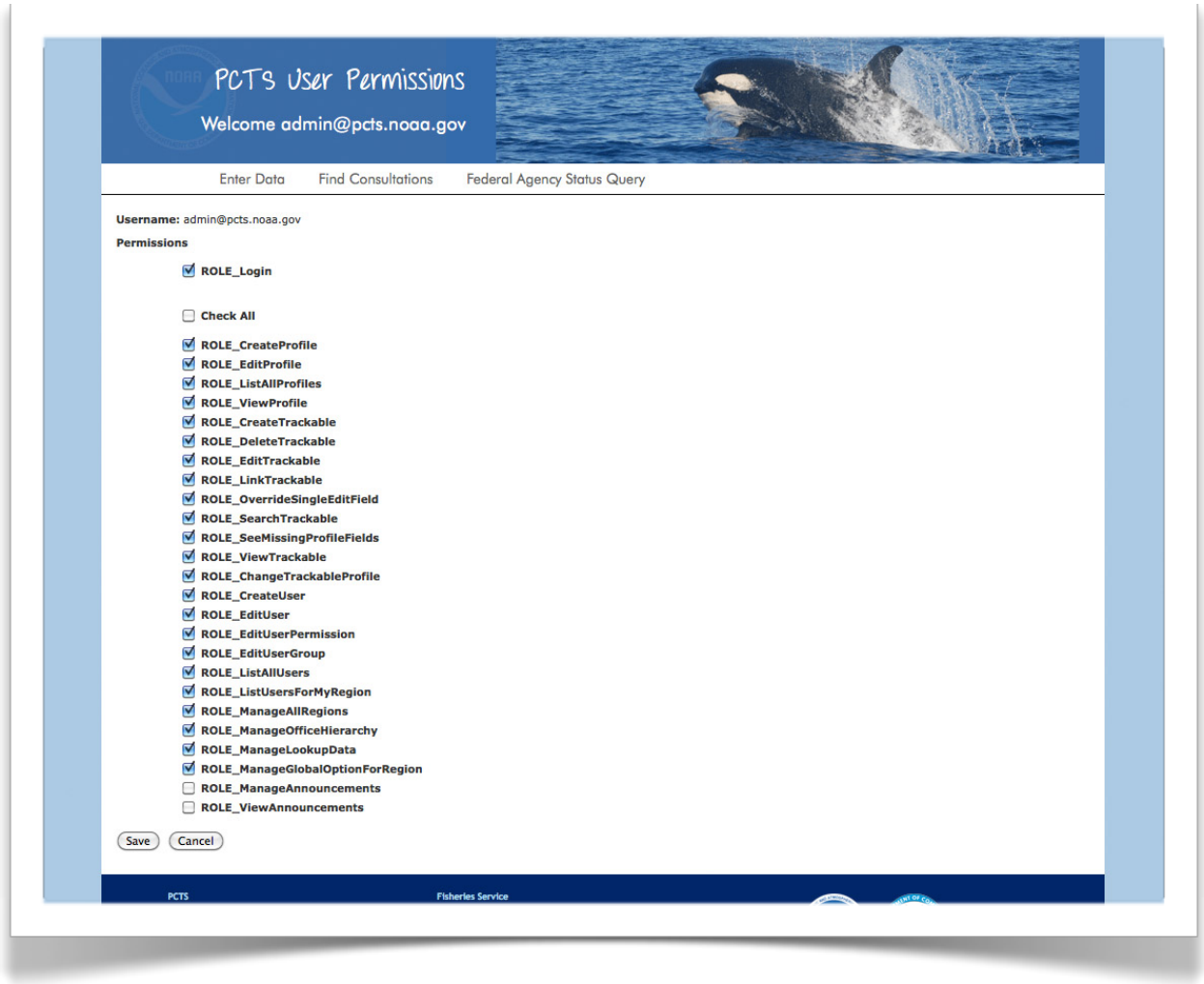


Figure 12.17: List User - Permissions Page

D. Delete

A user can be deleted by choosing the "Delete" option under the Operations section. This option is permanent so the admin user must be sure when completing this operation.

12.2.2 Add User

A new user can be added by selecting the "Add User" link located at the top left of the List User Page (Figure 12.18). Once selected, the admin user is able to create a new user (Figure 12.19) by specifying a username (email address), password, full name, region, division, offices, and branch or team. Once saved, the new user will successfully be created.

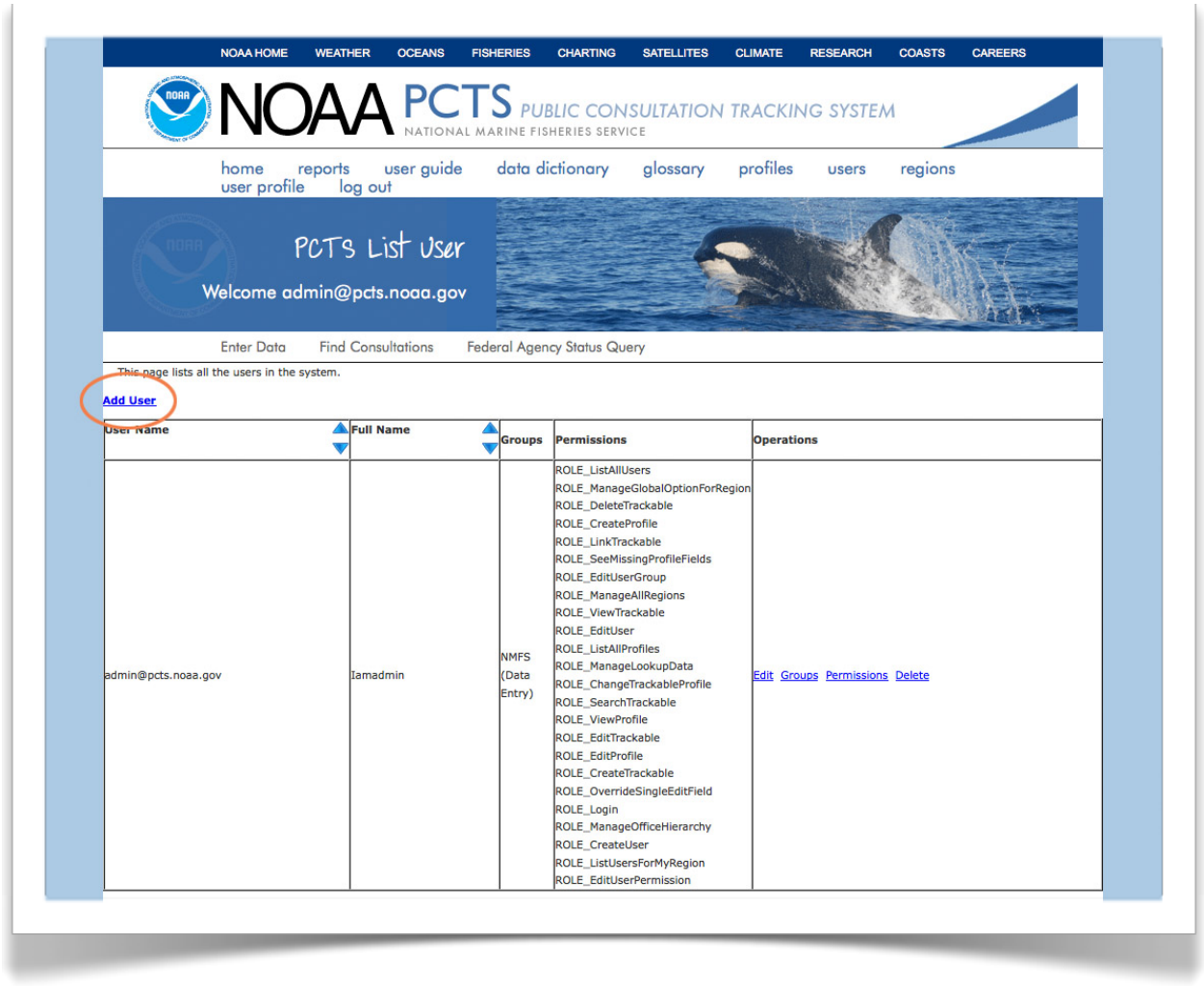


Figure 12.18: List User - Add User Link

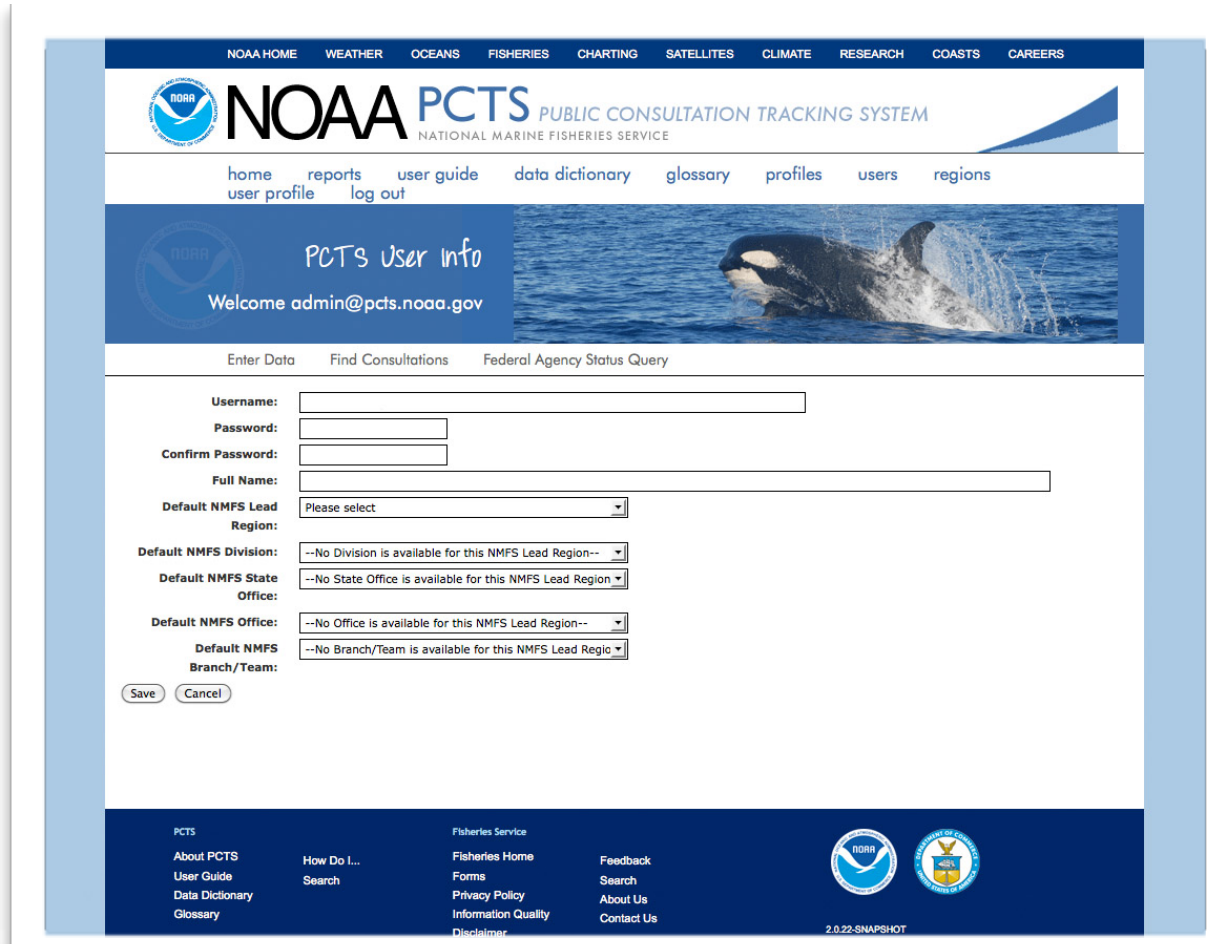


Figure 12.19: List User - Add User

12.3 Regions

Admin users are able to add a new region or edit existing regions on the List Region Page (Figure 12.20). The results can be sorted by Code, Name, or Description in both ascending and descending order. The Code is only editable when a user first creates a new region.

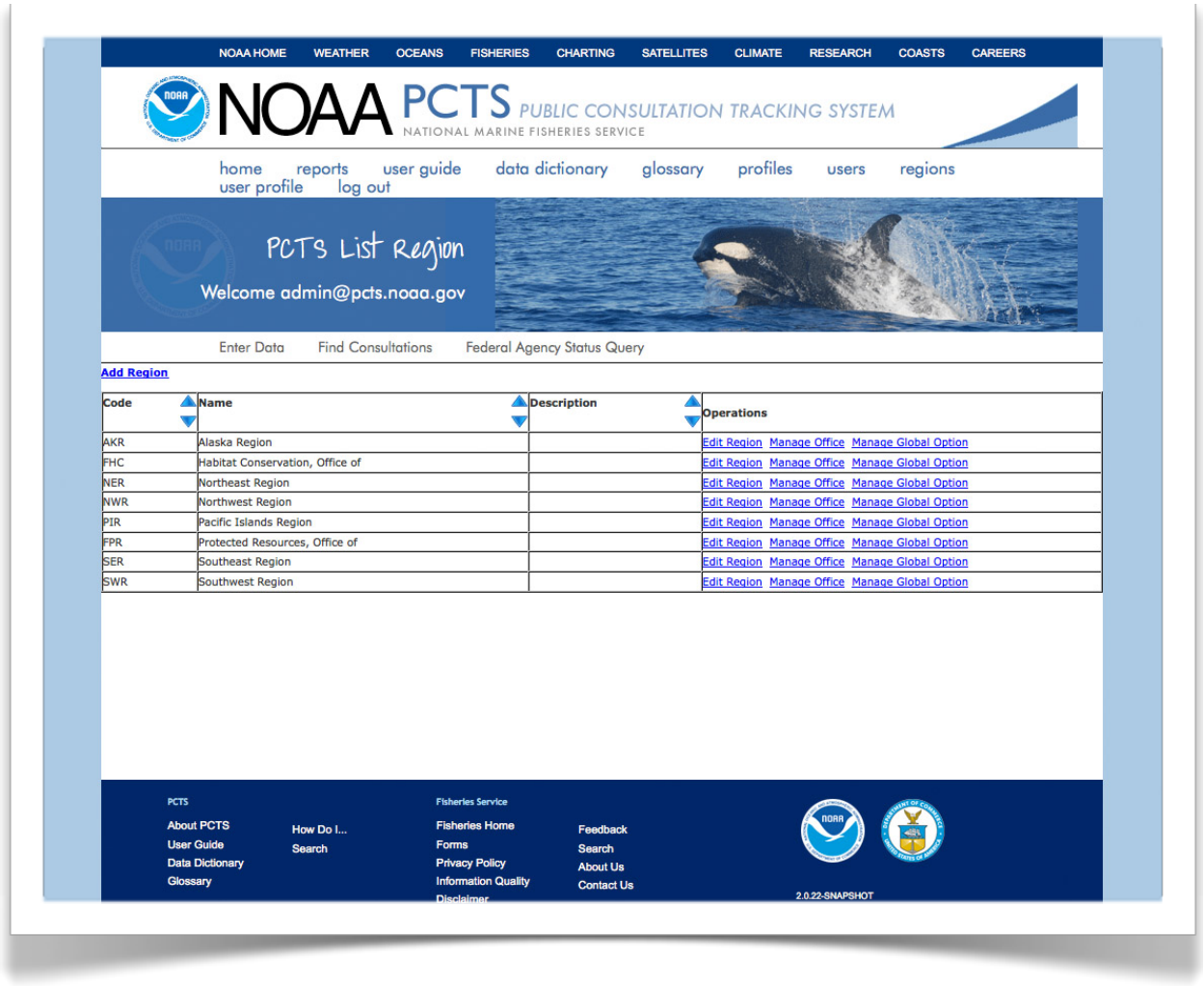


Figure 12.20: List Region Page

12.3.1 Operations

For existing regions, the admin user is able to edit a region, manage the office, and/or manage the global options.

A. Edit Region

The "Edit Region" feature allows the user to modify the name and description of the region.

B. Manage Office

The "Manage Office" link goes to the Office Hierarchy Page (Figure 12.21) that gives the admin user permission to assign various offices, branches, teams, headquarters or divisions to each region. By choosing any of the "Assign..." links, the admin user will be able to select a variety of choices pertaining to that specific option (Figure 12.22). The admin user is able to assign Office, State Office, Branch/Team, Headquarter, and Division to each region. In addition, the "Show/Hide" button allows the admin user to decide which sections of the page are viewable at any given time (Figures 12.23a and 12.23b). This Office Hierarchy also allows the user to remove any Office, Branch/Team, Headquarter and/or Division.

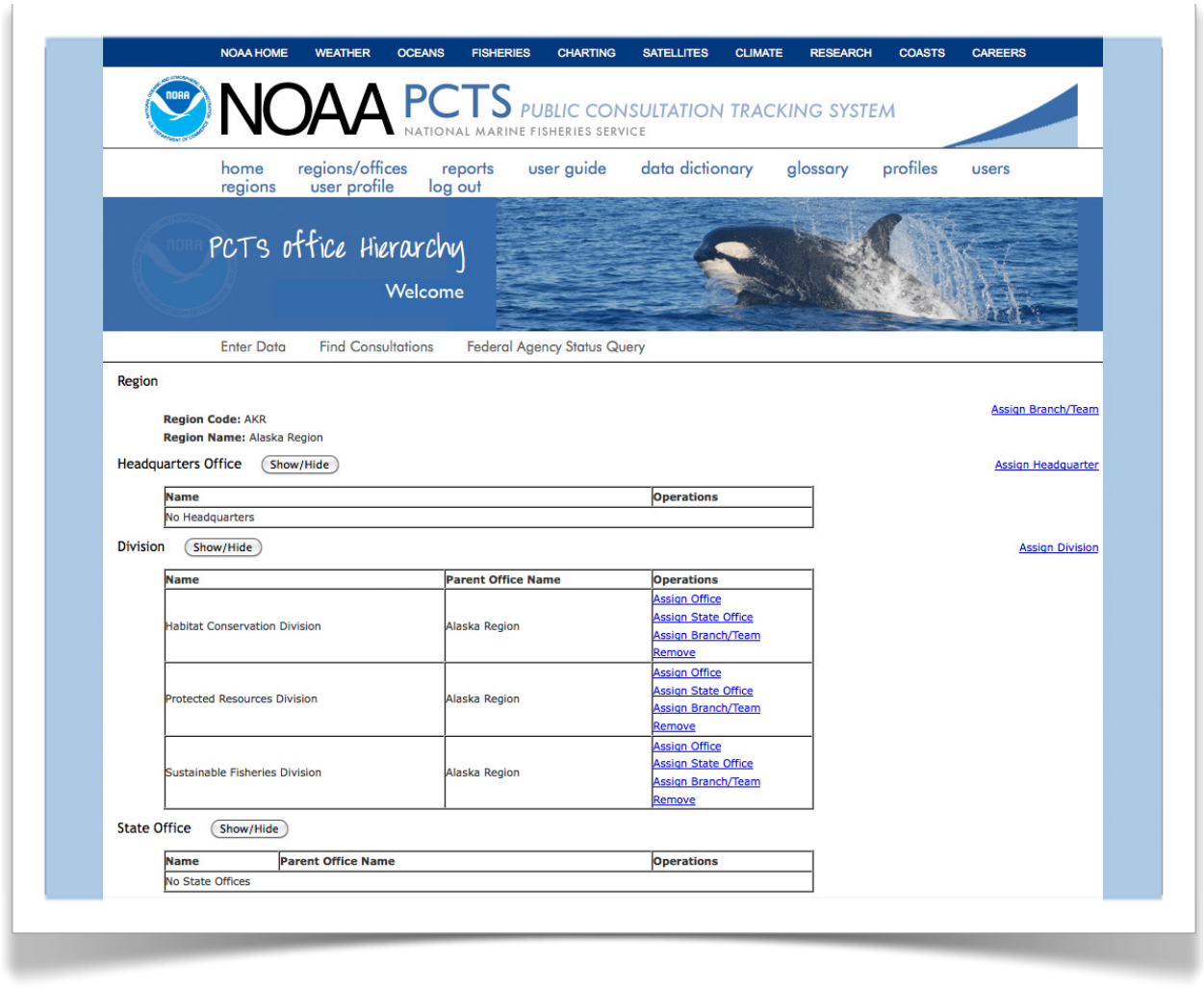


Figure 12.21: List Region - Office Hierarchy Page

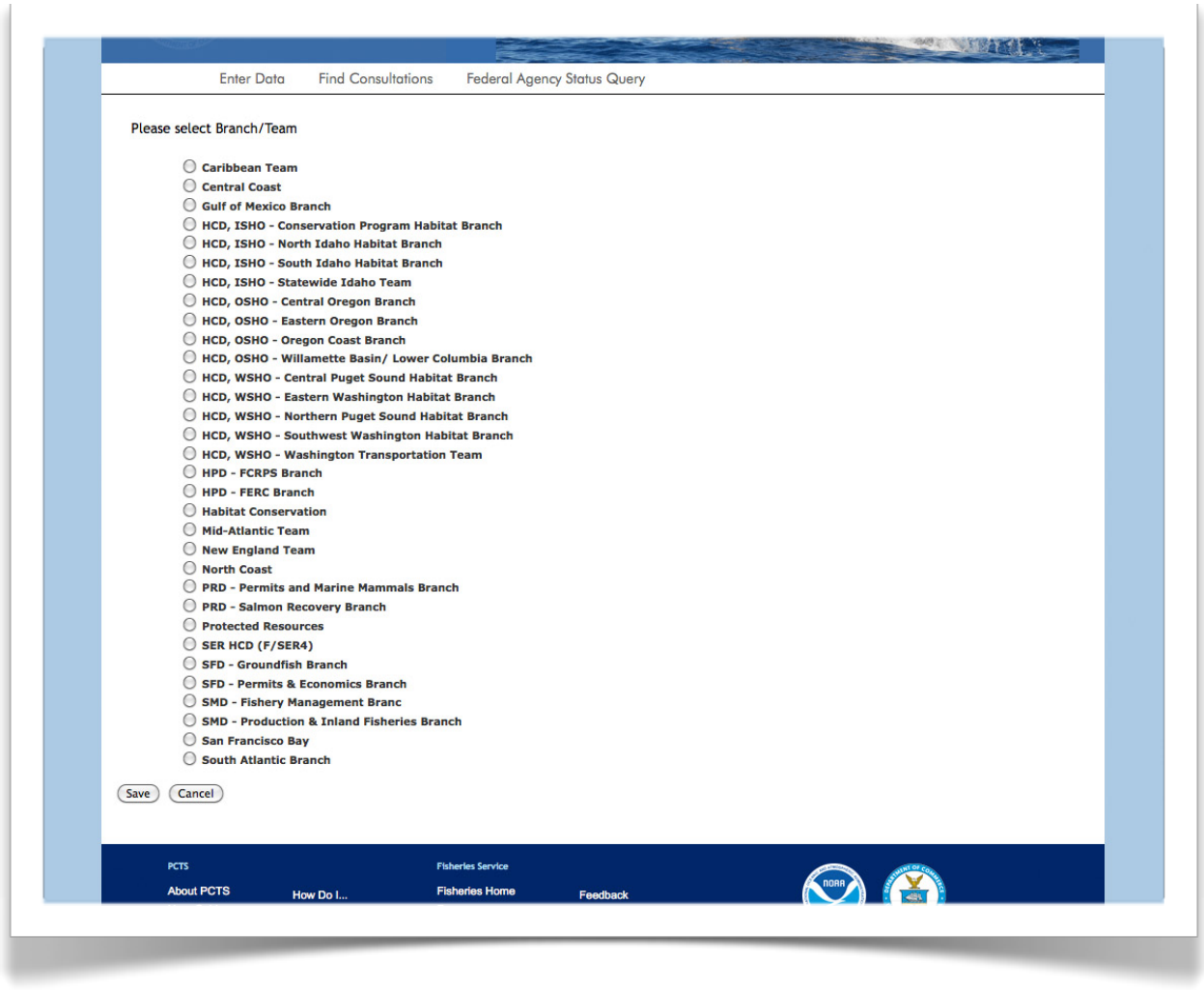


Figure 12.22: List Region - Assign Branch/Team Page

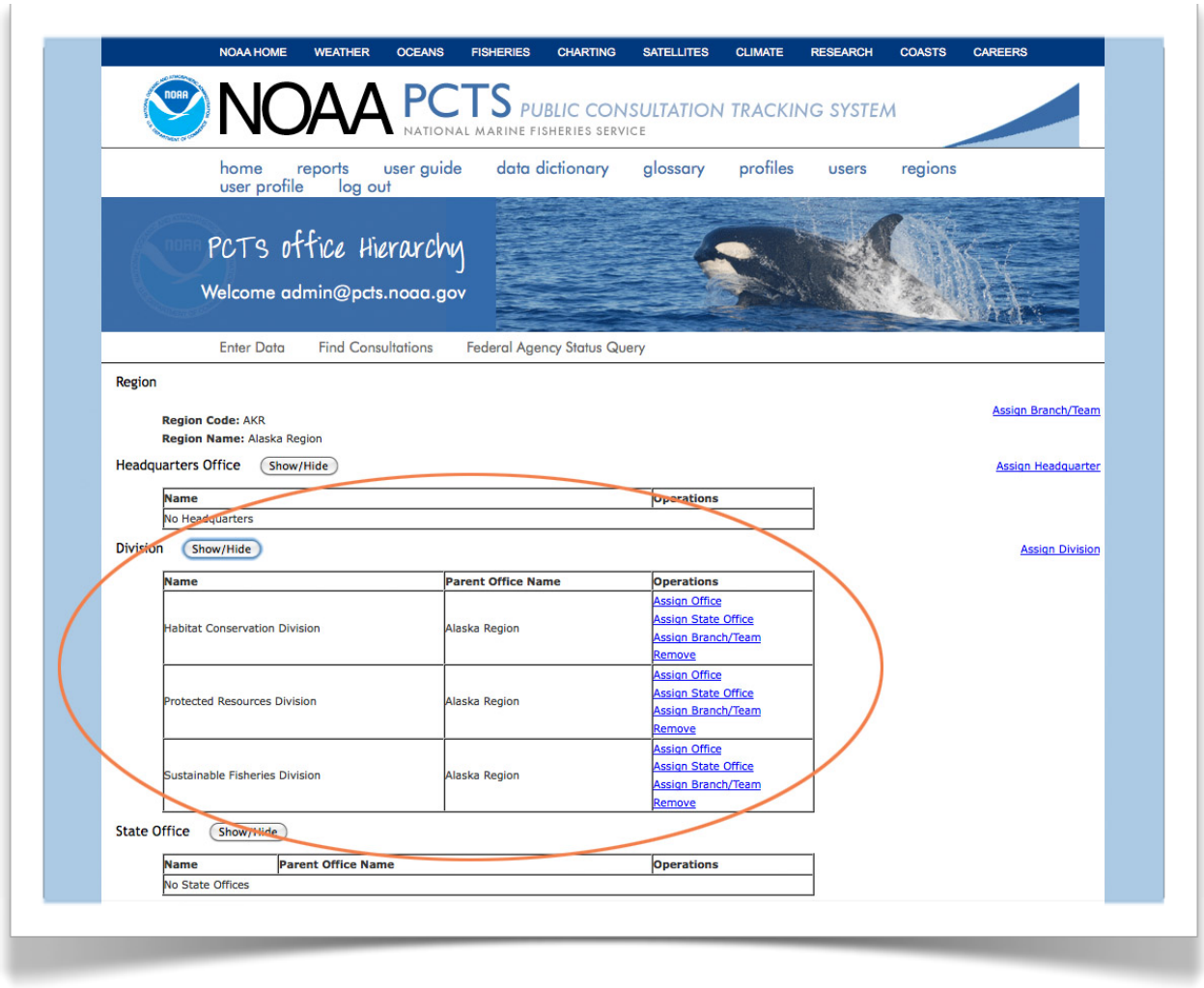


Figure 12.23a: List Region - Show

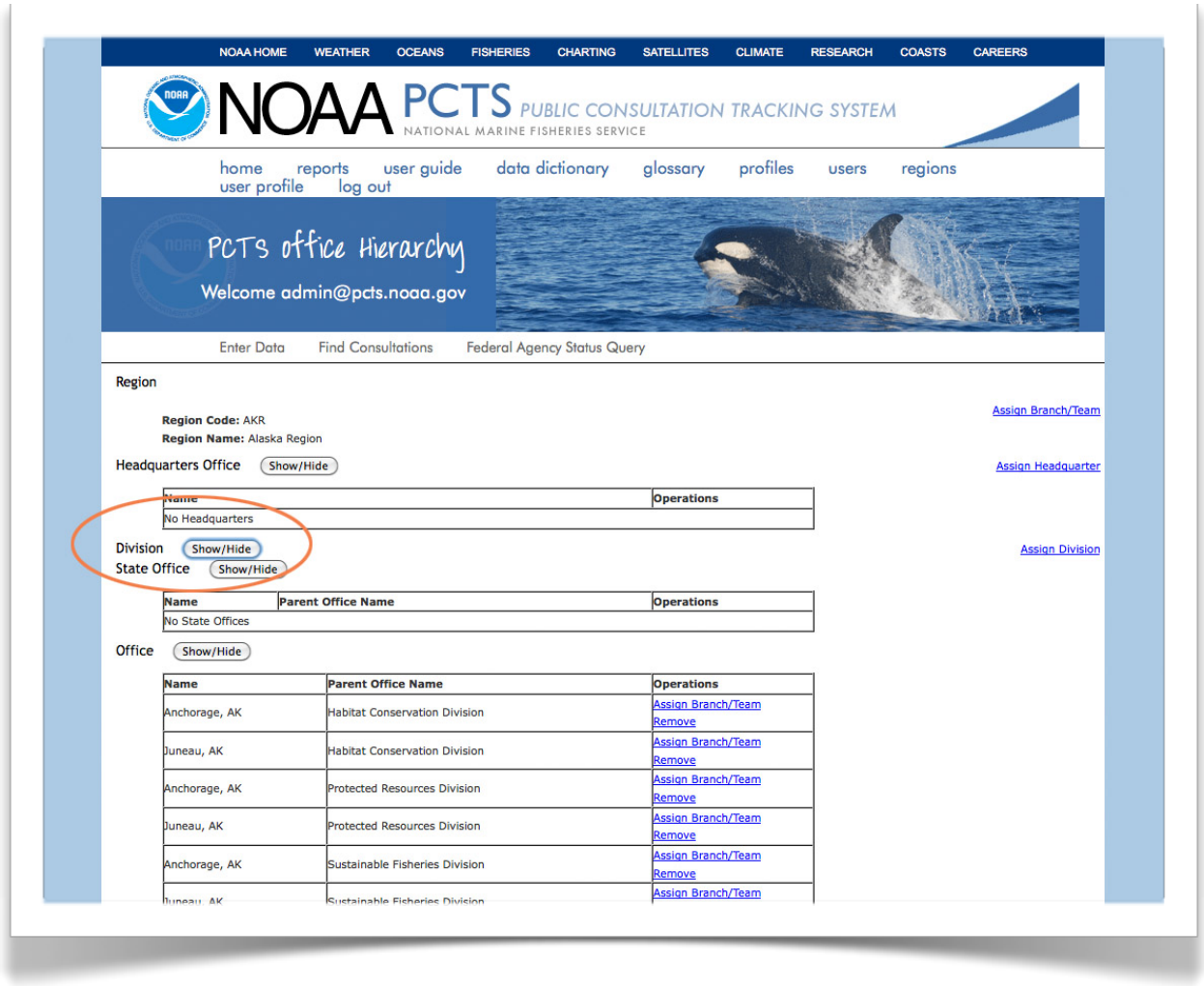


Figure 12.23b: List Region - Hide

C. Manage Global Options

Global options can be assigned to each region (Figure 12.24). The global options include Fishery Management Plan, Line Office, Species, State, and Subcategory. Within each global option, the admin user has the ability to assign or remove options for each region. As with the Global Option in the Profile section, the changes made here will be updated across all regions.

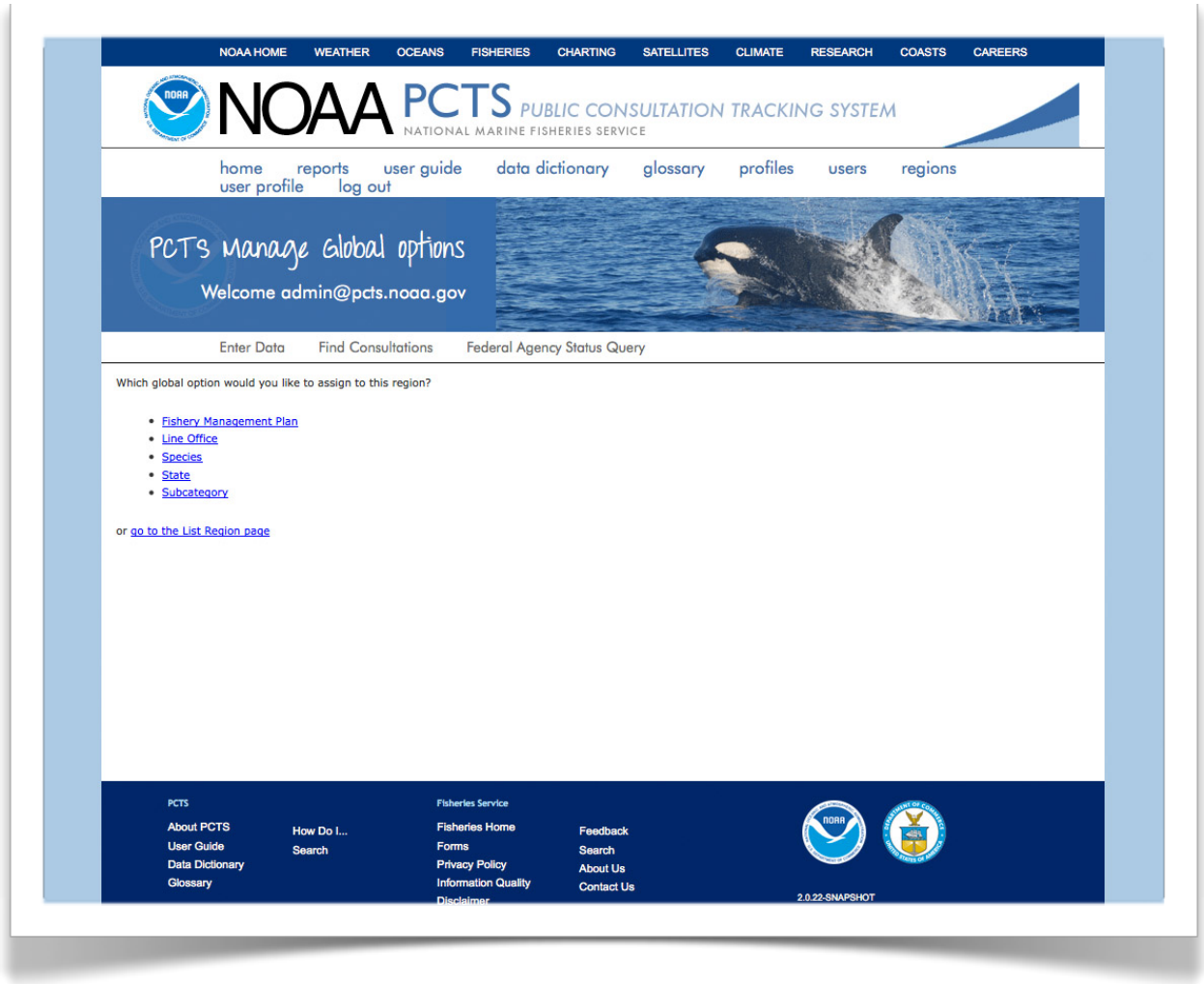


Figure 12.24: List Region - Manage Global Options

For example, in the Fishery Management Plan global option (Figure 12.25a), the admin user is able to remove the current settings under the Operations section of the page. Or, if additional plans need to be assigned, the admin user can choose the "Assign Fishery Management Plan" located at the top right of the page (Figure 12.25b). On each global option page, the user is also able to configure other global options by selecting the one of choice at the bottom of the page (Figure 12.26).

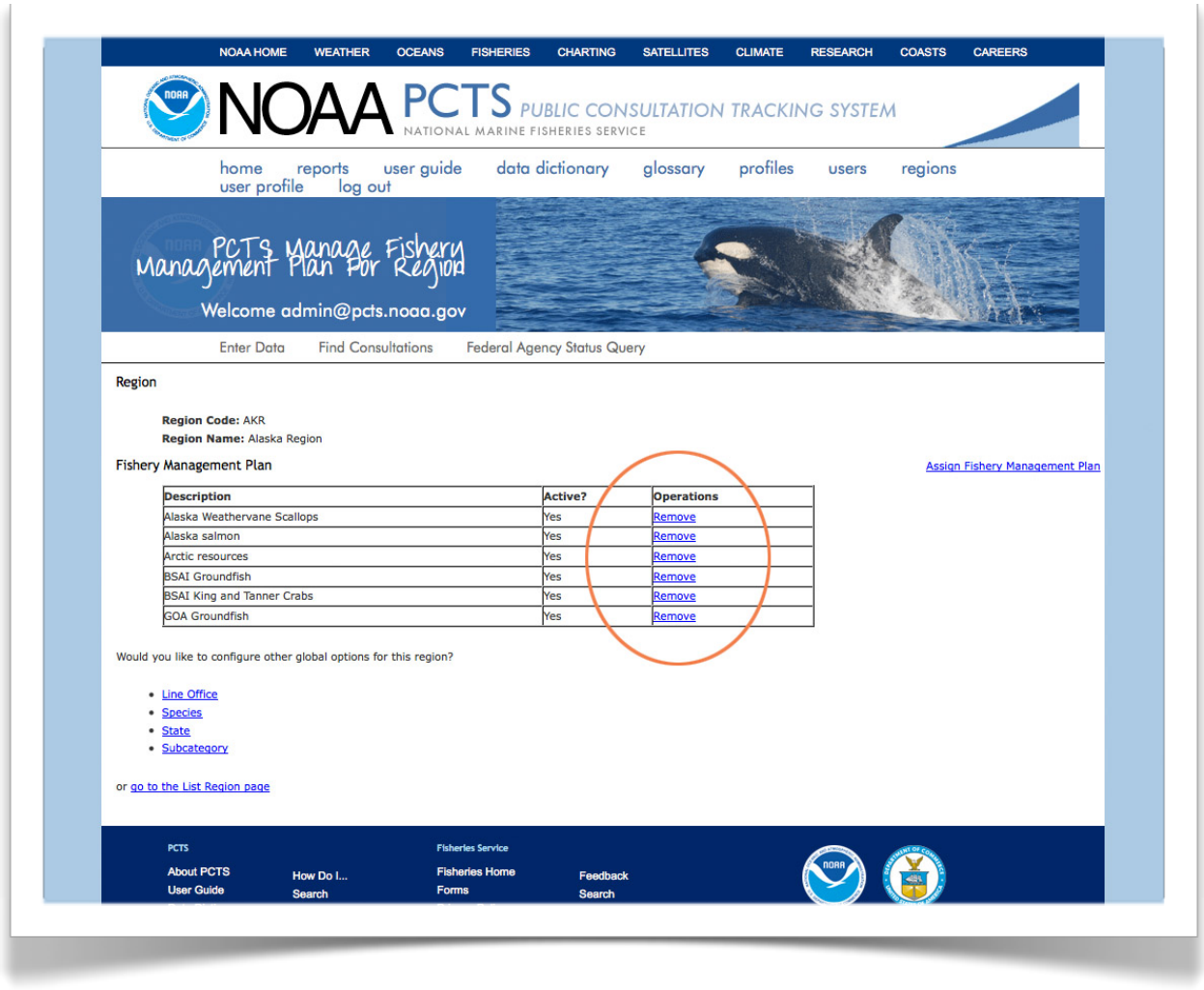


Figure 12.25a: List Region - Global Options Operations

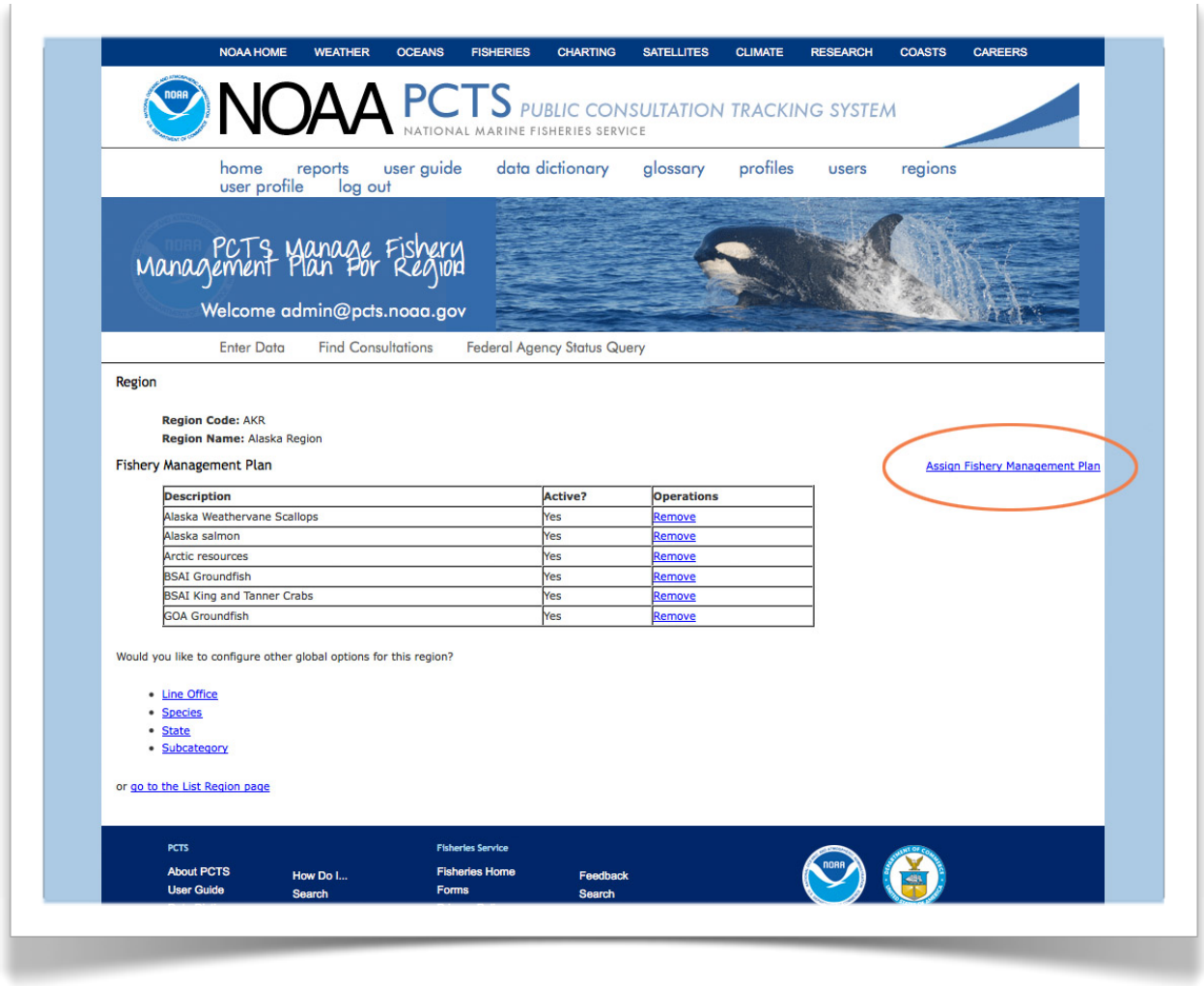


Figure 12.25b: List Region - Assigning Global Options Link

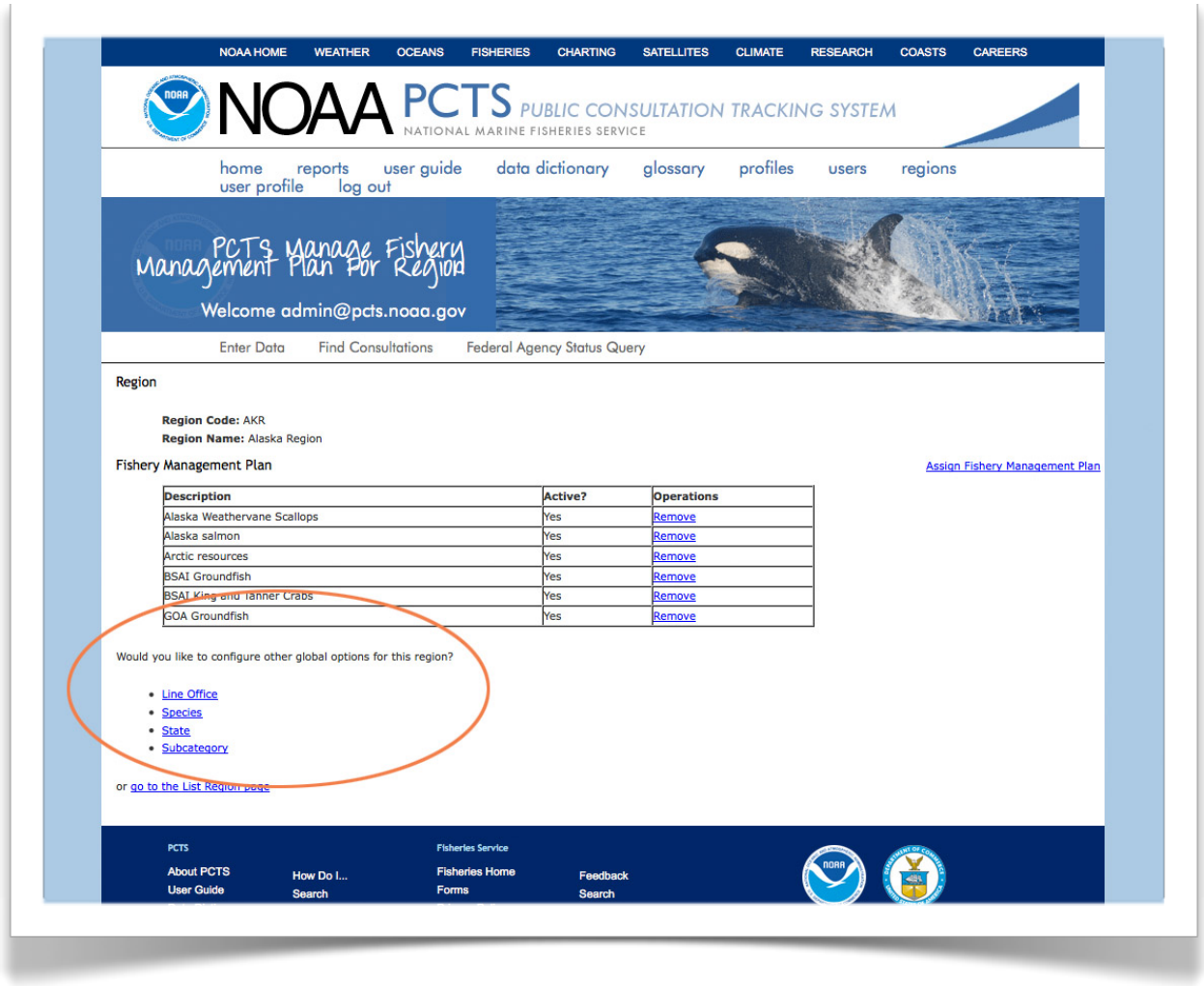


Figure 12.26: List Region - Configuring Additional Global Options

Once the "Assign Fishery Management Plan" link is chosen, the admin user then has the option to select additional global options to assign to the region (Figure 12.27). Once the selections have been made, the admin user can click on "Save" to successfully add the options to the selected region. These steps apply to all of the global options listed on the List Region Page.

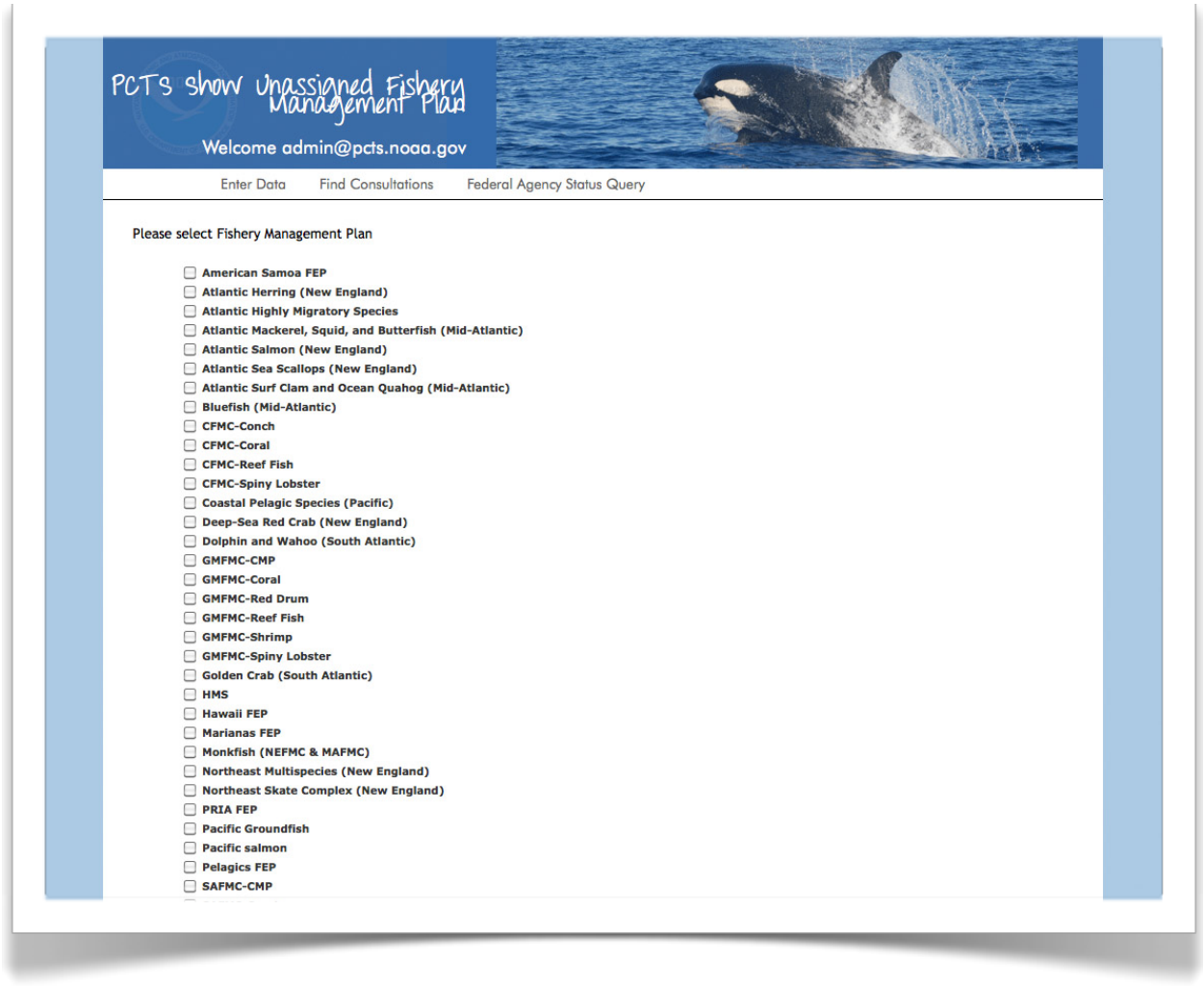


Figure 12.27: List Region - Assigning Global Options

13. Troubleshooting

13.1 Getting Help

When a problem occurs, help options are available from the PCTS Main Navigation Menu. At the top of the menu, select the "User Guide" link to access the online User Guide. The "Data Dictionary" and "Glossary" links may prove to be beneficial as well.

In addition, you may contact the PCTS Support Team by sending an email to "PCTS.usersupport@pcts.noaa.gov".