

# Chapter

# 2

## How to Use the APPS System

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## How to Use the APPS System

APPS applications contain modules, or specific sections, that you will complete depending on the type of permit or authorization you are requesting. However, the entire APPS system operates as one unit with shared requirements and sections. This chapter describes the shared requirements.

If at any time you have questions about APPS, your application, or any other feature, click on the “Contact Us” link (located on the left side of each web page) and contact the office responsible for processing your application. Someone will assist you with the process.

## System Requirements

APPS is designed to operate with the following minimum system requirements:

- For best results, Internet Explorer 8.0 or higher or FireFox 5.0 or higher should be used.
- Browsers must be javascript-enabled.
- Pop-up windows should be enabled.
- Display setting should be at least 800 x 600 pixels (in Windows check by selecting Start, Control Panel, Display, Settings, Screen Area).
- A screen of 17” or larger is recommended.
- Adobe Acrobat should be installed for viewing maps, the Online Application Instructions, and applications. The most recent version of Acrobat Reader may be downloaded and installed for free from the Adobe Acrobat Reader web site (<http://www.adobe.com>).
- The program functions on MAC computers but there may be difficulties viewing certain pages.



*It is highly recommended that you use a **PC and Internet Explorer** if you have the option.*

## How to Begin

Go to the Authorizations and Permits for Protected Species (APPS) web site <https://apps.nmfs.noaa.gov>. When you open the APPS Home page, you will see the “Welcome” message. At the bottom of this page there are three buttons. By clicking on these buttons you can:

### **Registered User**

– **Log on to an existing account**, make changes to an existing account, or create a new account.

### **New Researcher**

– **Go to the Pre-Application Guide (PAG)** to determine the type(s) of authorizations or permits you might need. After completing the PAG, you may be able to create an account and begin a new application, depending on the type of authorization or permit you need.

### **Search**

– **Review applications in APPS**. This function allows anyone to search the APPS database using multiple criteria.

There are limitations on the types of projects covered by APPS (see [Chapter 1](#) for more information). The PAG will ask you a series of questions to determine if APPS is applicable to your permitting needs. If you qualify to use APPS, you can set up a new account and become a registered user.

## Creating a New Account

To create a new account, from the Home page click on the **Registered User** button, then click on the “Set Up New Account” link. Required information is marked with an asterisk (\*). Enter the following information:

### *Email Address*

You must enter a valid email address as your User ID. It will be required each time you log on. We will also use it to send you important information about your permit or authorization and changes to the system. Please be sure to update your email as needed.

### *Password and Password Hint*

Passwords are case sensitive and must be between 12 and 20 characters long and include characters from at least three (3) of the following four (4) categories: uppercase letters (A...Z), lowercase letters (a...z), numbers (0...9), and/or special characters (~!@#%=\_-

?\$^+\*&). These are the only characters allowed. You must re-enter the password to confirm it. Your password will expire after one year.

Passwords must not include any of the following:

- Names of family, pets, friends, co-workers, fantasy characters, etc.
- Computer terms and names, commands, sites, companies, hardware, software.
- Common words, nouns, pronouns, acronyms, contractions, and geographic locations.
- Birthdays and other personal information such as addresses and phone numbers.
- Word or number patterns like aaaabbbb, qwerty, zyxwvuts, 123321, etc.
- Vendor supplied default passwords.
- Control characters and non-printable characters (e.g., enter, or tab, or backspace, or ctrl-c, etc.).
- Any of the above spelled backward. Any of the above preceded or followed by a digit (e.g., secret1, 1 secret).

Passwords must not be shared and must be protected to prevent their unauthorized use. Passwords should never be written down or stored on-line on non-Department of Commerce systems. Try to create passwords that can be easily remembered. One way to do this is create a password based on a song title, affirmation, or other phrase. For example, the phrase might be: "This May Be One Way To Remember" and the password could be: "TmAyBelw@2R!" or "T\$mAybE@IW+r" or some other variation.

You may not use the same password more than 1 time in 4 years.

The **password hint** is a word or phrase that can be used to prompt you for your password if you forget it. You cannot use your password as the hint.

**Note:** If at any time you cannot remember your password after viewing your hint, click on the link "reset password." This will bring up a Reset Password page. You will be asked to enter your User ID (email address you used when setting up your account). When you click on **Reset Password**, your password will be reset to a temporary system-generated password. The temporary password will be sent to the email address that serves as your user ID. For security purposes, once you log on using this password, you will be prompted to change it. You will receive a confirmation email once you have changed this password.



*If you make more than 5 consecutive unsuccessful log in attempts, your account will be locked and you will need to try at least 15 minutes later. This lockout period applies even if you have chosen to reset your password.*

### *Name, Title, Organization, etc.*

If your organization does not appear in the “Organization” drop-down menu, type in your affiliation. The “Secondary Phone Number” could be your cell phone number or other alternate number where you can be reached. **Do not enter personal information** such as home address or home phone if possible.

### *CV/Resume*

Click on the **Browse** button to attach a CV or resume. Once you select a file, its name will appear in the box. **Do not include personal information** (e.g., Social security number, date of birth, marital status) in your CV or resume.

### *Display Options*

You can customize APPS to set the starting screen that you will see when you log into APPS. You can also set defaults to filter records in your Portfolio. The following four (4) sections explain each of the options that you may set.

#### *Default View*

This indicates which screen you want to first see when you log into APPS. By default, the main screen you see will be the Portfolio. However, you can change this so that you see the Search screen instead.

#### *Default Portfolio*

This indicates the permissions level you have within APPS. You will not be allowed to change this entry.

#### *Default Portfolio Year*

This lets you select which year(s) you want to view in your Portfolio when you log on to APPS. You can choose the last year, the current year, next year or all years. By default, All Years is chosen. You can also change the year when you are viewing the Portfolio; however, that will set the year for the current session only.

#### *Default Portfolio Region*

This lets you select which regions you want to view in your Portfolio when you first log on to APPS. You can also change the region when you are viewing the Portfolio; however, that will set the region for the current session only.

## *Submit*

Once you have completed your personal account information, click the **Submit** button located at the bottom of the page. You will be prompted for any missing required information. Once your information is accepted and an account has been created, you will receive an email confirmation with your User ID and password. This may take several minutes. If you do not receive confirmation within 24 hours, please go to the “Contact Us” link on the Home page to contact the office responsible for processing your application.

After your account is created, you will be placed at the “APPS Login” screen. Enter your User ID (email address) and password to log into the program.

## Log On/Edit My Account Details

Once you have an account, click on the **Registered User** button. Enter your User ID (the email address you used when you set up your account) and password in the appropriate fields.

Then click the **Log On** button to access your permit and report records, to change your address, phone number, etc., or to change your password. You will receive email confirmation whenever you change your password.

## What Happens After I Create an Account?

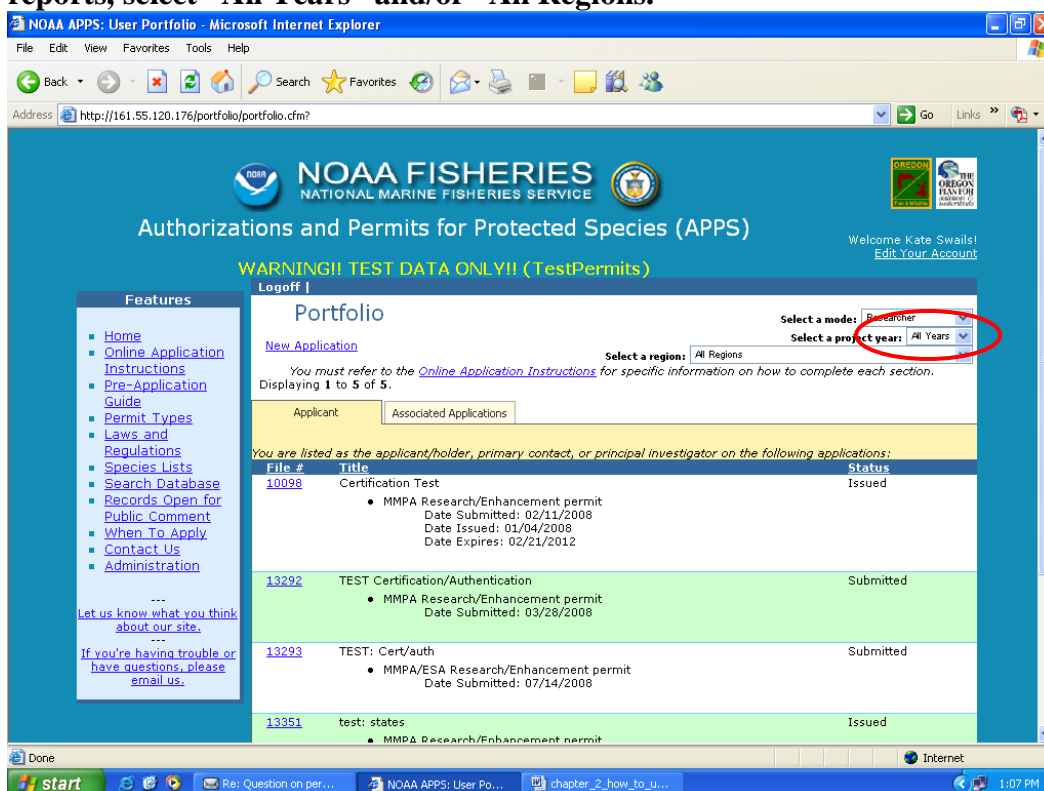
Once you have an account, click on the **Registered User** button to log on. When you log on, you will be presented with a page indicating that you are now on a government computer system and that it is for authorized use only. Click on **Continue** to accept the terms of use and complete logging on to the system or **Log Off** to leave the system.

You will be presented with either your Portfolio or the Search page, depending on the default option you selected when you set up your account. The “Portfolio” page provides a listing of and access to your applications and reports, as well as information on their status. The “Search” page allows you to access your applications and reports by file number or other criteria. You can also see any other issued permits and approved reports in the system using this page. (See [Chapter 6](#) for more information.)

You can always go back to your “Portfolio” page by clicking on the Portfolio link on the menu bar on top of the page, right next to the Logoff link. If you do not see Logoff link, you are not currently logged on the system. You must be logged on to see your Portfolio. To go back to the “Search” page, use the Search link on the left-hand menu under Features.

## Portfolio Page

In the upper right hand of the “Portfolio” page are dropdown boxes that are used to filter the applications that are displayed on the page. **To see all of your applications and reports, select “All Years” and/or “All Regions.”**



### *New Researcher*

New users are assigned the “Researcher” permission level. Researchers can only access applications and reports on which they are the Applicant/Permit Holder, Responsible Party, Principal Investigator, Primary Contact, and/or Co-investigator. Depending on your assigned role for a specific permit, you can add, edit and submit applications, modifications, and reports. See **Appendix II** for definitions of these terms.

Researchers will have two tabs in their portfolio, “Applicant” and “Associated Applications.”

- Under the “**Applicant**” tab, you can access applications for which you are the Applicant/Permit Holder, Responsible Party, Principal Investigator, and/or Primary Contact.
- Under the “**Associated Applications**” tab, you can view, but cannot edit, applications for which you are listed as a Co-investigator or other personnel.

Under each of these tabs are the following headers. Click on these headers to change the way your portfolio is sorted. To see an application in detail, click the blue “File #.”

- **File #:** This is the number assigned by APPS for your application. We will refer to this number in correspondence regarding your application, and it will become your permit or authorization number.
- **Title:** This is the title of your project that you entered for your application.
- **Status:** This is the process status of your application or permit.

If your portfolio has more than 20 applications/permits and you wish to see additional items, click the “<Previous” or “Next>” links in the row above the headers (see below for more information on navigation). You may also page through your applications by clicking on “Page numbers” at the bottom of the screen. To see all actions in your portfolio, click on the “Show All” link at the bottom of the page.



## *New Application*

The “Portfolio” page contains the “New Application” link. Click on this to create a new application. You will be directed to the Pre-Application Guide (PAG) and prompted to answer a series of questions designed to determine the type of permit you need. The PAG “Results” page will give you the option to “start an online application now,” or to “cancel this application.”

**If you start a new online application, you should minimally enter the project title before you log off and save your application.** Your application will be saved in a “Draft” status until you complete and submit it.

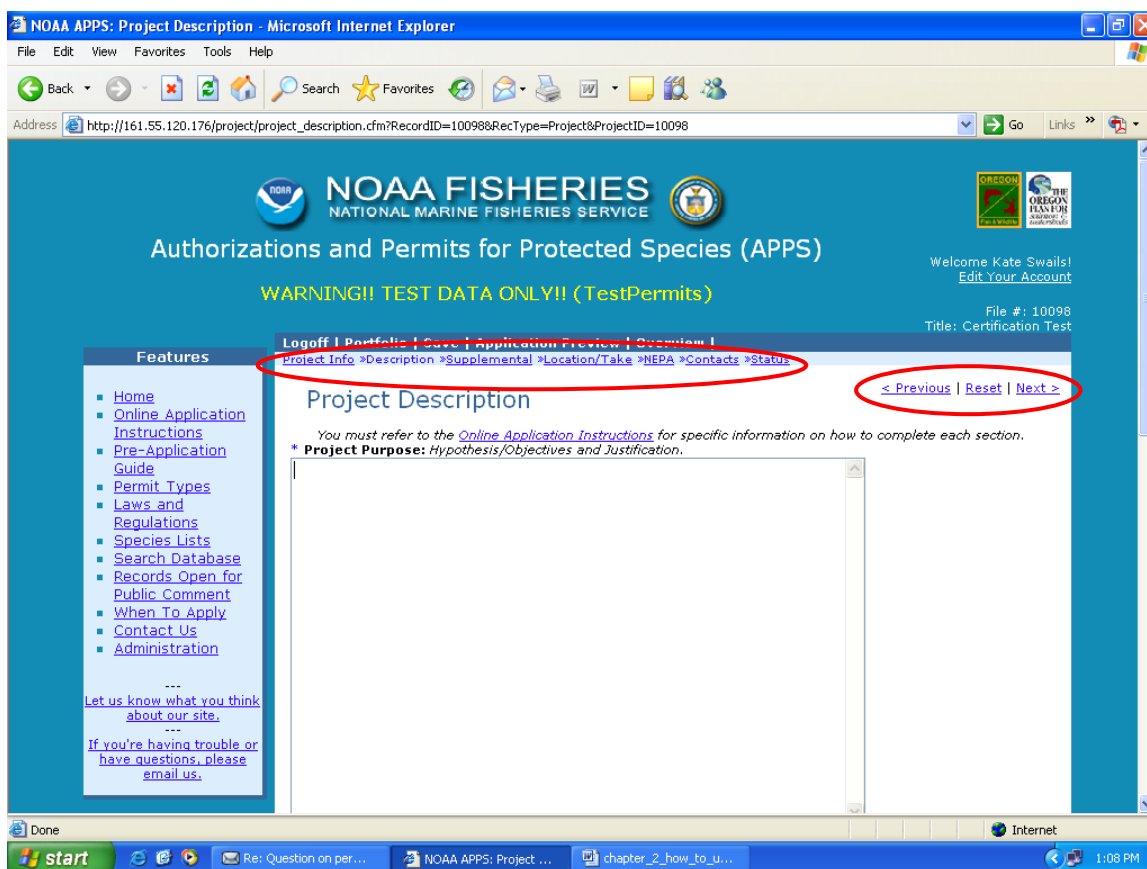
**Note:** If you wish to renew an existing Oregon Scientific Take Permit or National Marine Fisheries Service (NMFS) 4(d) authorization, see [Chapter 3](#) for details. Using the renewal process should greatly expedite the application process.

When an application is first created, **the person who initiates the application will be assigned all of the following roles: Applicant/Permit Holder, Principal Investigator, and Primary Contact.** While the application is in draft mode, you can edit and change who is assigned to these roles on the “Project Contacts” page of the application. APPS will send automatic email notices to the Primary Contact and Principal Investigator. This could be two different people or just one person. See [Appendix II](#) for definitions of personnel.

If you mistakenly click on the new application button and do not want to create a new application, or simply **want to delete a draft application**, please follow these steps:

1. If you previously saved the application, go to your “Portfolio” page and select the application you wish to delete.
2. Click on the “Application Preview” link at the top of the page.
3. From the “Application Preview” page, click on the “delete project” link to remove the project from the database.

## Navigating in APPS



You will be entering information on a series of screens. You can use the **breadcrumb links (represented by the title of each major section of the application)** at the top of each page to jump to other pages in the application without having to complete the required information prior to leaving a page, if working in draft mode.

If you use the **APPS navigation links** (“<Previous,” “Reset,” or “Next>”) on the right side of the pages, you will go to each screen in a sequential order and **you will be required to enter all information** prior to leaving a page.



***Do not use the navigation buttons within your browser, as you may lose data you have already entered!***

Be patient when using APPS, some screens take time to load and save. An asterisk (\*) denotes fields that require text to be entered before you can move to the next page or submit an application.

### *Next>*

Saves the data you have entered and moves you to the next data entry page. Use this link or the breadcrumb links instead of your browser's forward button. When you click on this link, you will be asked "Would you like to save this page?" Hit "Save" to save new data, or "Cancel" to continue on to the next screen without saving.

**Note:** Navigating using this button requires you to complete data entry on the page before you can move to the next page.

### *<Previous*

Saves the data you have entered and moves you back to the previous data entry page. Use this button instead of your browser's back button. When you click on this link, you will be asked "Would you like to save this page?" Hit "Save" to save new data, or "Cancel" to continue on to the next screen without saving.

**Note:** Navigating using this button requires you to complete data entry on the page before moving to the previous page.

### *Reset*

Removes/deletes all information entered on the current page since the last save.

## Saving Information in APPS

### *Saving*

Save your data often by hitting the "Save" link located in white font on the blue bar at the top of the "Portfolio" page.

You will also be prompted to save information when you use the navigational "<Previous" or "Next>" buttons on the top right of the active screen. Hit "Save" to save new data, or "Cancel" to continue on to the next screen without saving.

### *Timing Out*



**APPS will time out after 20 minutes with no activity.** A 5-minute warning message will appear to prompt you to save your work or refresh your screen to continue.

You can refresh the screen, hit “Save,” or choose to log out at this point. If you do not save or refresh, the system will automatically log you out and you will lose any unsaved data.

### *Saving a Draft*

You do not have to enter a complete application in one sitting. As long as you save before exiting, the information that you entered will be there when you return to the application. The application will be saved as a draft. Before exiting, please **note the application’s File Number**. If you have problems returning to the application or questions about completing or submitting the application, this number will help us locate your application so we can assist you.

## Submitting an Application

After entering all required information click “Save” and “Next,” which takes you to the “Submit Application” page.

Please **preview the data** before submitting the application. You may preview the application by clicking on one of the following links:

- “Click here to preview project data,” or
- “Print or Export to File.”

**Note:** Only the first option, preview project data, will allow you to make edits to the application.

### *Preview Project Data*

On the “Application Preview” page, you will see the titles of the application sections preceded by a plus sign (+). When you click on one of the application sections, the section expands to display the information you entered.

You may edit individual sections by clicking on the “edit section” link. You may also delete/clear sections or the entire application. To delete the application, click on the “delete project” link next to the “Project Information” title.

### *Print or Export to File*

This option allows you to print a hard copy or save the application as a PDF file. When you click on this link, you will first be prompted to choose the output type by clicking on the radio button to “Print” or “Save as PDF File” under “Which type of output would you like?”

For each option, you must next choose the page set up as portrait (Printable on 8.5" x 11" paper with portrait orientation) or landscape (Printable on Legal paper with landscape orientation) by clicking on the appropriate radio button under “Which orientation would you like to use?”

### *Submit Application*

When you are satisfied that the data are complete, click on the **Submit Application** button. APPS will run a series of information checks to ensure you have entered all of the required data fields. If any required fields have not been completed you will be directed to complete them. You may need to scroll around the page to see the error messages and the fields to which they refer (highlighted in yellow). Continue to click on the **Submit Application** button until all errors are corrected.

Before you can submit your application you must authenticate your identity and certify that all information in the application is correct. Refer to [Chapter 3](#) and **Chapter 4 Section A** and [Section B](#), as appropriate for more detail.

The application is not submitted until you see the “Thank you for Submitting” message. This confirms that the application you entered was successfully submitted and the application’s status will change from “Draft” to “Submitted” in your portfolio.

### *Return to Portfolio*

Clicking on this link will take you back to your portfolio.

## What Happens After I Submit My Application?

Once you have successfully submitted an application, you should receive an email notification that it was successfully submitted. If you do not receive notification within 24 hours, go to the [“Contact Us” link](#) on the Home page to contact the office responsible for processing your application.

When you submit your application, notification will be sent to the appropriate agency (NMFS and/or Oregon Department of Fish and Wildlife). The application will be reviewed for completeness, and the appropriate agency will notify you if there are any questions.

See the corresponding chapters of these instructions for more information on specific applications.