EKOSYSTEM®

Environmental Knowledge Organizer

2011 Version
User Manual

TABLE OF CONTENTS

INTRODUCTION

Paladin Data Systems is pleased to present ***EKO-System***. ***EKO-System*** is a robust data and project management system designed specifically and customized accordingly for use by natural resource professionals.

In addition to this user training manual Paladin Data Systems offers support via the Service Desk **Monday - Friday 9am-5pm PST (PDT)**.

Email: support@ekosystem.us
Phone: 360-394-5995

The goal of this user manual is to familiarize the user with the various capabilities that ***EKO-System*** has to offer. It will provide the necessary information to navigate around and manage the different modules. Each chapter will include instruction and several screenshots of administrator-level pages to yield a more comprehensive view and understanding of ***EKO-System***.

NOTE: Your organization will determine what functions are most applicable.

The modules that will be covered are as follows:

Projects	Will demonstrate how to create projects and project templates. It will also provide examples on mapping projects and sharing project information.
Files	Will discuss storing and sharing documents, photos, and URL's.
Maps	Will show a broad range of options for mapping, storing, uploading, downloading and sharing information related to projects, and control areas.
Control Areas	Will explain how this feature allows users to share geographic features and use them to organize and report on project information.
Settings	Will discuss how an organizations site settings and user permission is handled.
Configuration	Will demonstrate how the local data configuration is established and maintained.
Contracts	Will show how the Contract Module is applied to track and report on the contracts and grants that fund projects.

SCOPE OF DOCUMENTATION

This document is intended to provide project sponsors and datasite administrators the basic information necessary to leverage the core functions of EKO-System. The sections contained within this document will provide users with the ability to enter project information, create reports, and map projects.

Upon completion of this manual, users will be able to perform the following tasks:

- Create a Project with complete attribution
- Use Reporting Codes to populate project attributes and quantify Goals and Objectives
- Create custom Project Maps
- Create, modify, save, and share custom reports on Project information

Prerequisites:
The minimum requirements are basic computer skills and familiarity with Internet browsers.

KEY DEFINITIONS

Name	Definition
Datasite	A Data Site is an online repository of information that is used for the storage and distribution of project data and documents. EKO-System configuration typically takes place at this level
GeoRegion	A GeoRegion is a polygon feature with a defined geographical area that projects, and other georeferencable data, are located within the boundaries of.
GIS	A Geographic Information System (GIS) is a system of hardware and software used for storage, manipulation, creation, retrieval, mapping, display, and analysis of geographically referenced data. EKO-Systems Map Browser retrieves, maps, and displays geographic data, however it cannot perform analysis.
Group Datasite	A Group Datasite is an aggregation of EKO-System datasites used to display, analyze, and report on project features across several datasites.
Level 1 Category	A Level 1 Category is the highest level that information is stored at in the Project Hierarchy. These folders help to organize project information at the strategic level.
People and Organization Roles	Personal and organizational roles in projects are defined in this section to help organize the roles people and organization play in project.
Primary Status	The Primary Status of a project is a defined list of valid statuses for projects in a datasite. In HWS, the Primary Project status is defined as Conceptual, Proposed, Active, and Completed.
Project Category	Project Categories are a defined list of categories used to organize projects.
Project Hierarchy	The project hierarchy is tool used to organize projects at different levels according using the project's scale and the organization’s strategies. The organization of the project hierarchy is adaptable and may be changed by the client after configuration.
Reporting Code	Reporting Codes are used to measure, identify, organize, and report on project elements.
Reporting Code Category	Reporting Code Categories are used to organize reporting codes within different themes.
Secondary Status	The Secondary Status or a project is used to identify project status as sub-statuses below the primary status level.

SECTION 1: GETTING STARTED

System Requirements
Sign In
Edit Profile
Navigation

This section consists of the following information:

- What hardware and configuration is required to operate ***EKO-System*** from the user's workstation.
- How to login for the first time and change the password.
- How to navigate throughout the various modules of ***EKO-System***.
- The System Administrator role.

EKO-System Requirements

In order to use EKO-System effectively, the user's machine must operate using the following:

EKO-System can be used with the following web browsers:

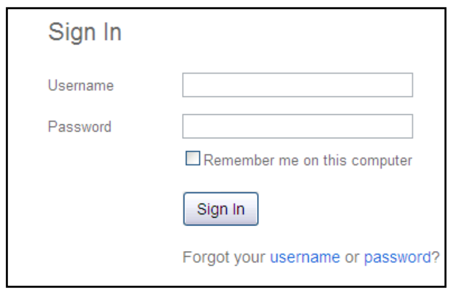
- Internet Explorer
- Firefox
- Chrome
- Safari
- Opera

To use the EKO-System map, Microsoft Silverlight 4.0 plug-in must be installed.

1-1: Sign In

What to do:	How to do it:
Sign In	a. In your web browser go to your ***EKO-System*** implementation Public Portal b. Click ***Sign in (***button in the upper right hand corner) c. Enter ***Username*** (provided) d. Enter ***Password*** (provided for first login) e. Click ***Log In*** or hit ***Enter*** on the keyboard

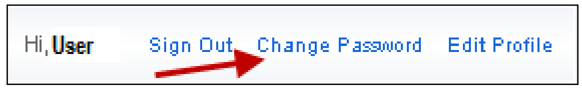
NOTE: After a period of inactivity the system will timeout and prompt the user to Login.



1-2: Change your Password

What to do:	How to do it:
Change Password	If needed, users can change their password using the following instructions.

a. Click ***Change Password*** in the upper right hand corner



b. Enter your ***Old Password***

c. Enter your ***New Password***

- Password cannot contain username
- 7-16 characters
- Alpha/numeric characters, case sensitive

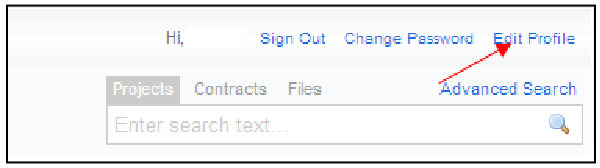
d. Enter your ***New Password*** again to verify

e. Click ***Change Password***

1-3: Edit Profile

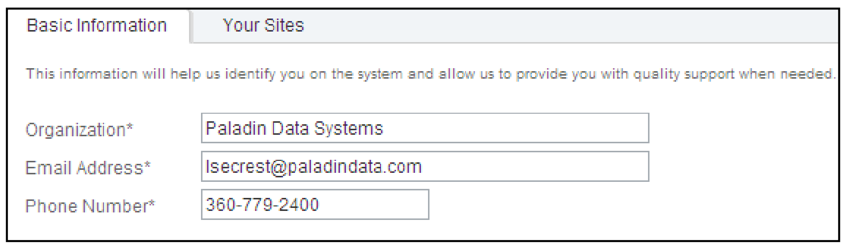
Users have the ability to maintain personal information and set the default datasite. The email address stored here is the email address that is used for the forgotten password/forgotten username tool.

What to do:	How to do it:
Basic Information	a. Click ***Edit Profile*** in the upper right hand corner



b. Update ***Basic Information***

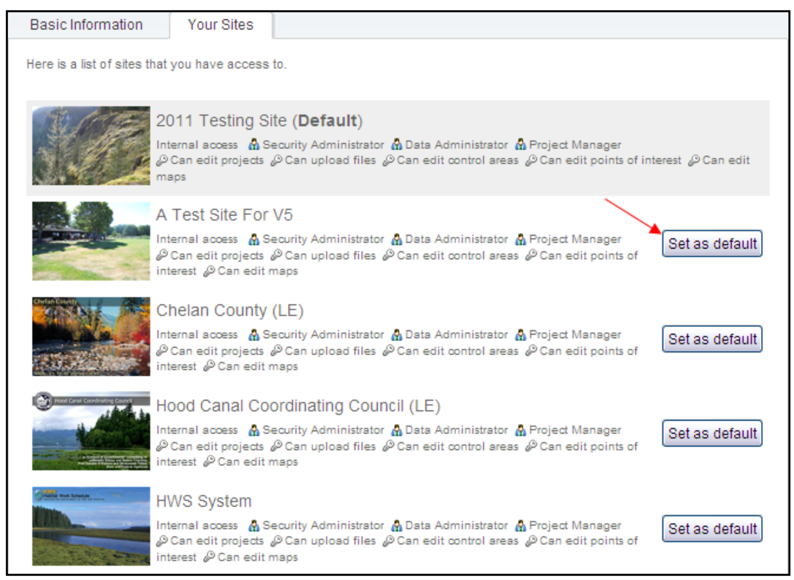
- Organization
- Email address
- Phone Number



c. Click ***Save Changes***

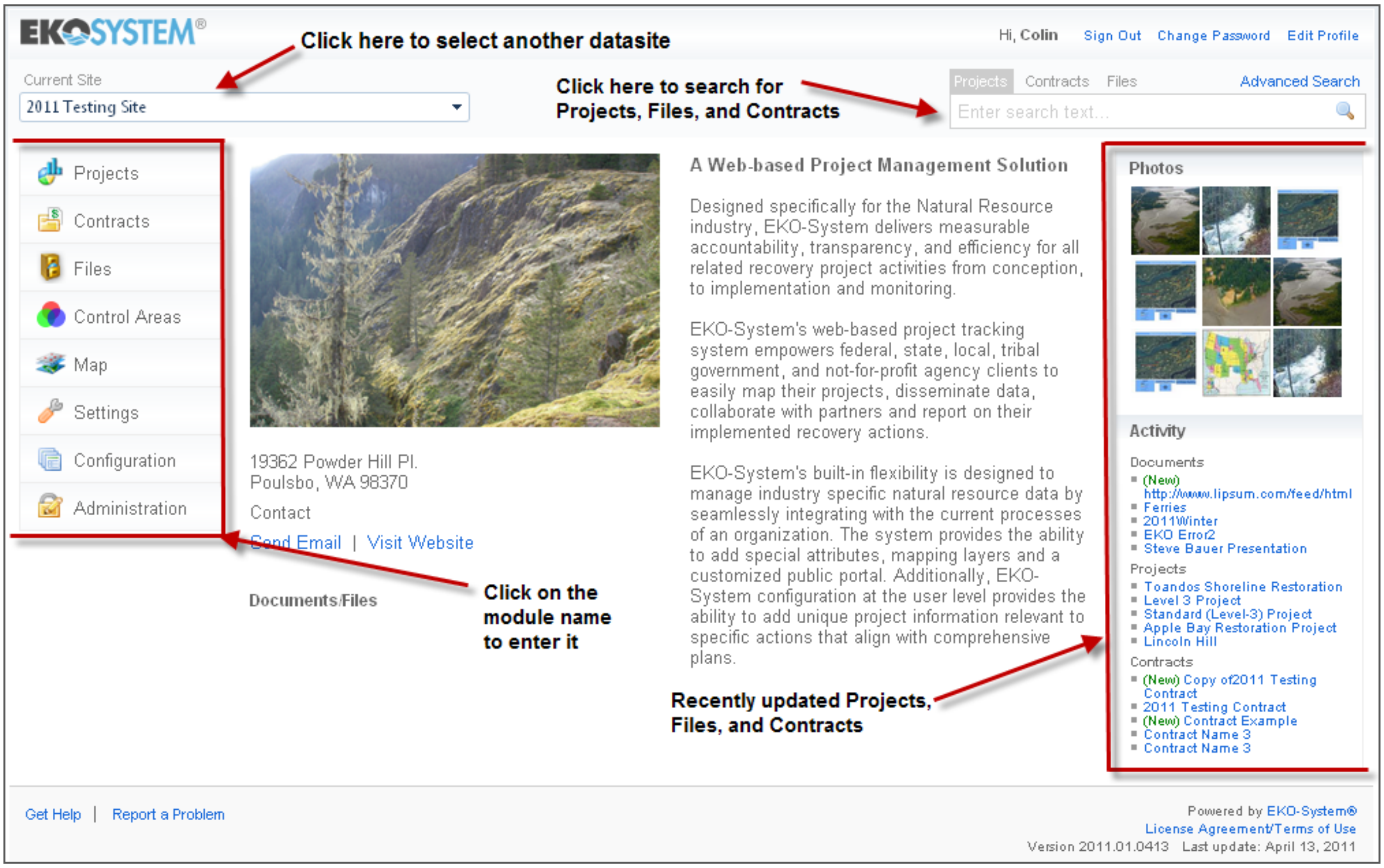
Your Sites

a. Click ***Set as Default*** next to the appropriate site



1-4: EKO-System Navigation

Hyperlinks and buttons have been setup throughout ***EKO-System*** to ease transition from one module to the next. Click the hyperlink to quickly navigate to the main functions of the system; e.g. ***Map, Files, Projects, or Contracts.***

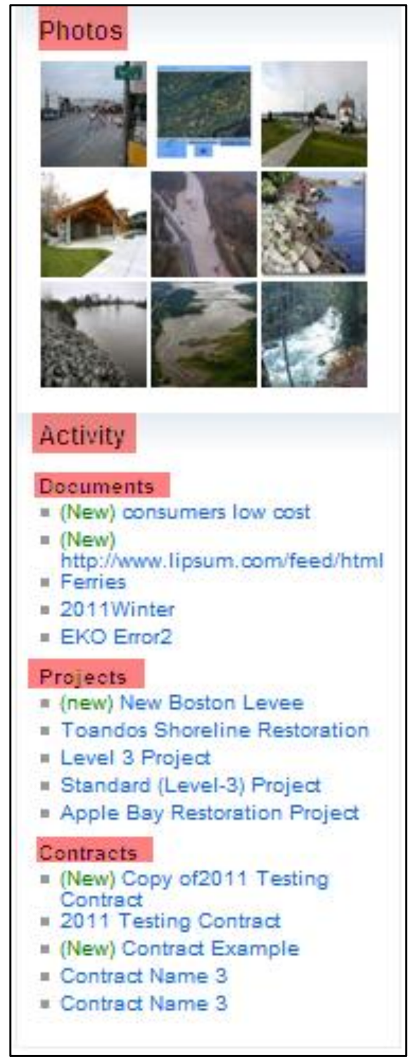


1-5: Recently Updated

Recently updated Projects, Contracts, documents, and photos are displayed on the right hand side of EKO-System's home page.

Photos

Photos recently uploaded to a Project or the Files module will be displayed at the top section on the screen. The nine most recently uploaded photos are displayed. Users can view the Project or File attributes page by clicking on the image. The order of display for these photos cannot be changed.



Recent Activity

Recently Updated Documents

Documents recently uploaded to the Files module will be displayed beneath the Documents heading in the Activity section on the right hand side. The five most recent documents will be listed. The name displayed in this list is the document title. If a user hovers over the document name, a tool-tip will appear to inform you who uploaded the document and on what day. Click on the document to open it.

Recently Updated Projects

Projects recently created or saved will be displayed beneath the Projects heading in the Activity section on the right hand side. The five most recently created or updated Projects will be listed. The name displayed in this list is the Project name. If a user hovers over the Project name, a tool-tip will appear to inform you who created or updated the Project and on what day. Click on the Project to open it.

Recently Updated Contracts

Contracts recently created or saved will be displayed beneath the Contracts heading in the Activity section on the right hand side. The five most recently created or updated Contracts will be listed. The name displayed in this list is the Contract name. If a user hovers over the Contract name, a tool-tip will appear to inform you who created or updated the Contract and on what day. Click on the Contract to open it.

SECTION 2: SETTINGS

Site Profile Information

Home Page Settings

Map Settings

User Permission and Access

Other Settings

The Settings module allows the Data Administrator to control site settings and user permissions. Only users with the Data Administrator role have access to this module. Security Administrators will have the Settings button in left toolbar.

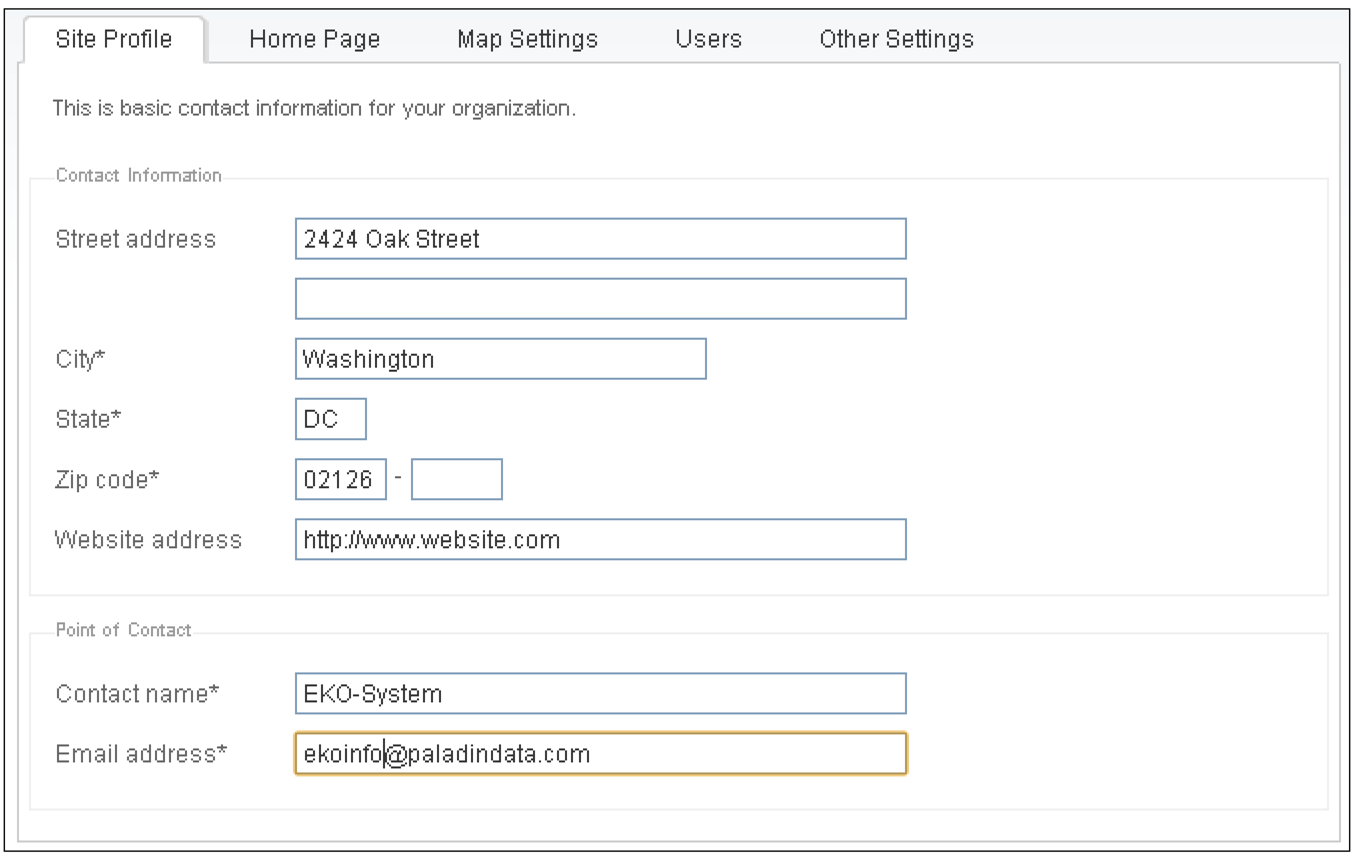
This section will discuss the following topics:

- Organization address and contact information
- Home Page settings including description and photo
- Map settings
- Setting user permission and access to information in the datasite
- Show project names to read-only users
- Show funding summary on project view page
- Email site contact when projects are created

2-1: Site Profile

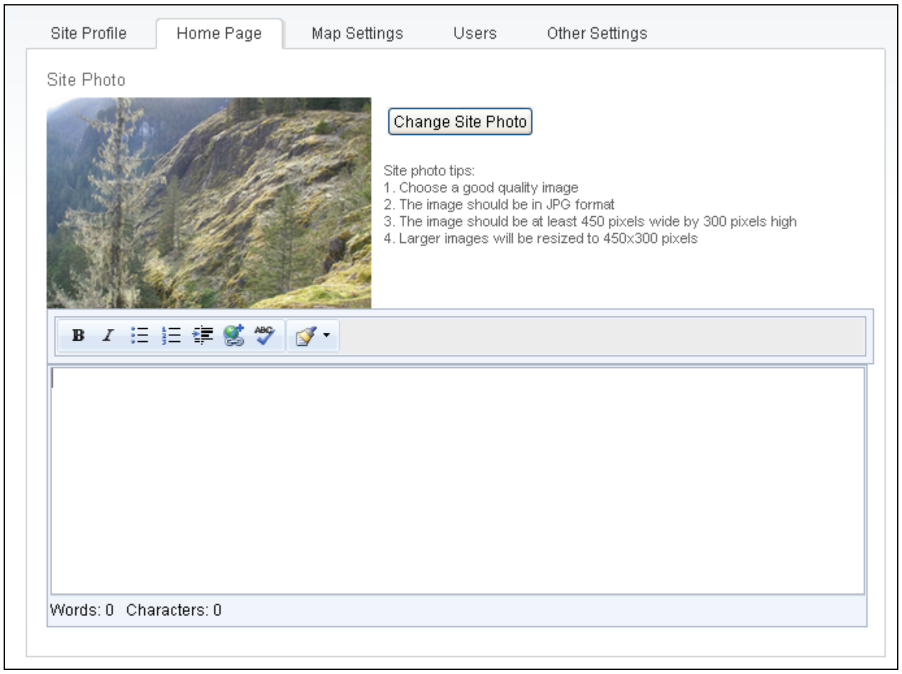
Organization contact information is controlled on the Site Profile page. Here, the organization's address, website address, point of contact, and email are stored.

What to do:	How to do it:
Change Organization Contact Information	The Site Profile Page allows the Security Manager to control the basic contact information about the organization. This information includes the following: • Address • Website • Point of Contact Name • Point of Contact Email Address To modify any of this information, type the updated text into the fields and click the Save Changes button to save.



2-2: Home Page

From the Home Page tab in the Setting Module, Security Administrators can change the datasite Home Page Content and Site Photo. To change this information, follow the instructions below.



What to do: | **How to do it:**

Upload New Site Photo

a. Click the ***Change Site Photo*** button

b. Click the ***Select*** button

c. Select an image from your machine or network

d. Click the ***Continue*** button

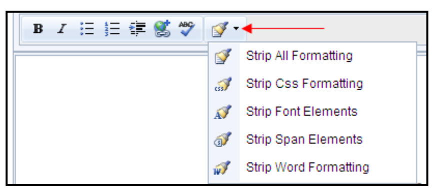
Change Organization Description

To enter a description into the Home Page Content, simply type or paste text into the textbox.

The Home Page Content description is the text that will be displayed on the Home Page screen internally and will be the Organization description on the Public Portal. This description can be up to 4000 characters, not including HTML formatting.

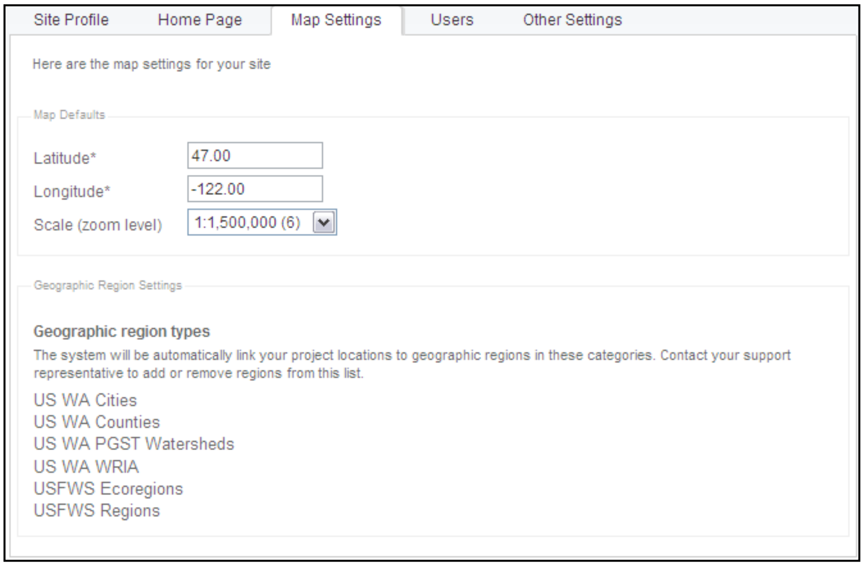
Using the Content control bar, text can be made bold, italic, placed into list, or indented. Hyperlinks can be created using URLS. Any text entered into this box can also be spelled checked.

NOTE: Text copied from a website, Microsoft Word, or other technologies that support other rich text format should be stripped of all formatting using the ***Strip All Formatting*** option from the ***Strip*** drop-down menu.



2-3: Map Settings

The Map Settings menu allows the Security Administrator to control the Map Module defaults, including latitude, longitude, basemap, and scale. To edit each of these settings, follow the instructions below:



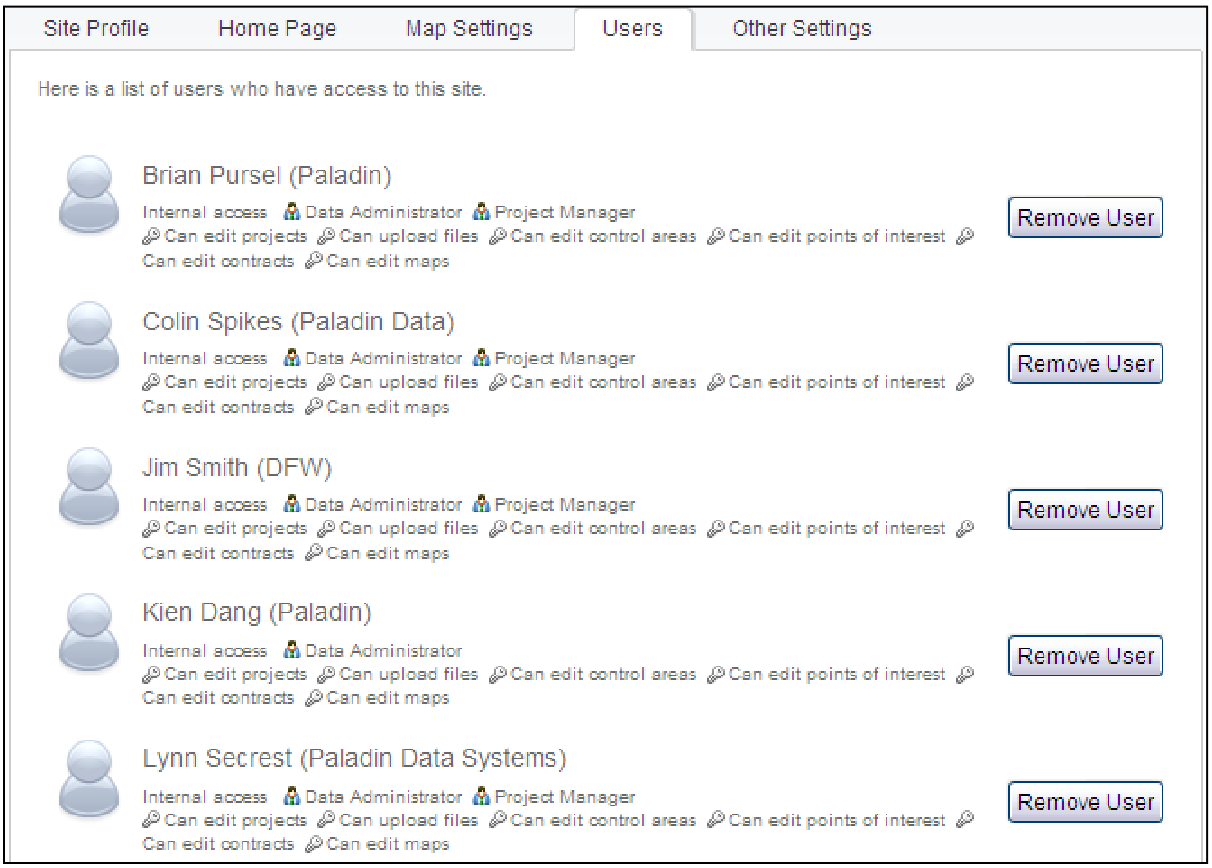
What to do:	How to do it:
Default Map Location	a. Enter the default latitude b. Enter the default longitude c. Click the Save Changes button
Default Basemap	The default basemap is the layer that project locations, control areas, and other Map layers will be drawn on top of. Basemap layers examples include aerial photography, topography, or a street map and will vary depending upon your configuration. a. From the Map Settings page, click the **Default map** drop-down menu b. Select the desired default from the menu c. Press the Save Changes button
Default Map Scale	The default scale will determine what scale or zoom level the Map Module will open in. a. From the Map Settings page, click the Scale (zoom level) drop-down menu b. Select the appropriate scale from the menu

2-4: Users

During the initial setup of EKO-System, users were created by a ***System Administrator*** at Paladin Data Systems. The ***System Administrator*** creates new accounts, sets users' data access, and ensures users are assigned to the applicable database (s). User access and permission can be controlled by users at the datasite level by users assigned the ***Security Administrator*** role.

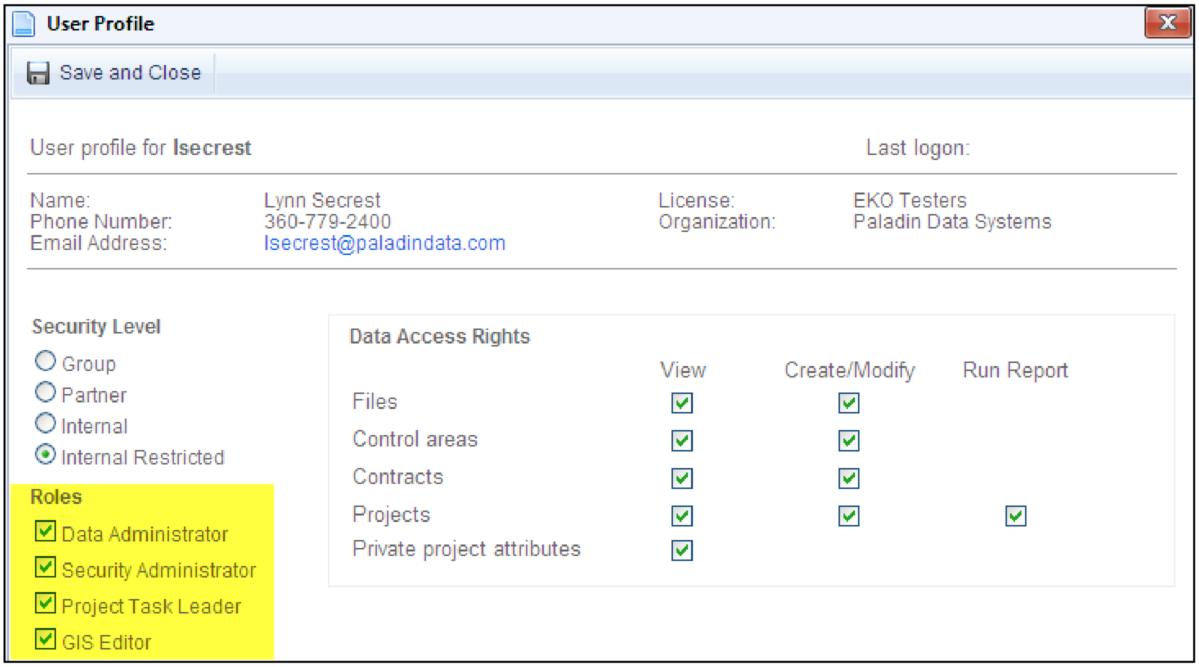
NOTE: Users can only be created by the Paladin Data Systems System Administrator.

The ***Security Administrator*** has control over all user access to the designated database through the ***Users*** tab in the ***Settings Module***. To control users' data access, click the ***Settings*** button on the left navigation bar and the ***Users*** tab. To control an individual user's permission, click on the user's name or the user icon from the user list. To remove a user from the datasite, click the ***Remove User*** button next to the user. Following any changes to user access, click the Save Changes button.



User Profile - Roles

Assigning roles to specific users allows a greater degree of control over who has access to what data stored in the datasite. To control a user's roles, click on their name from the user list and click the checkbox next to that role from the user's security profile page. Each of the four Security Roles is listed below:



Data Administrator

- Access to the **Configuration Menu** within EKO-System
- Ability to configure datasite Code/Measurement, Project Categories, Contact, and Contracts
- All edit capabilities

Security Administrator

- Access to the **Settings Module**
- Ability to change roles and user access level

Project Task Leader

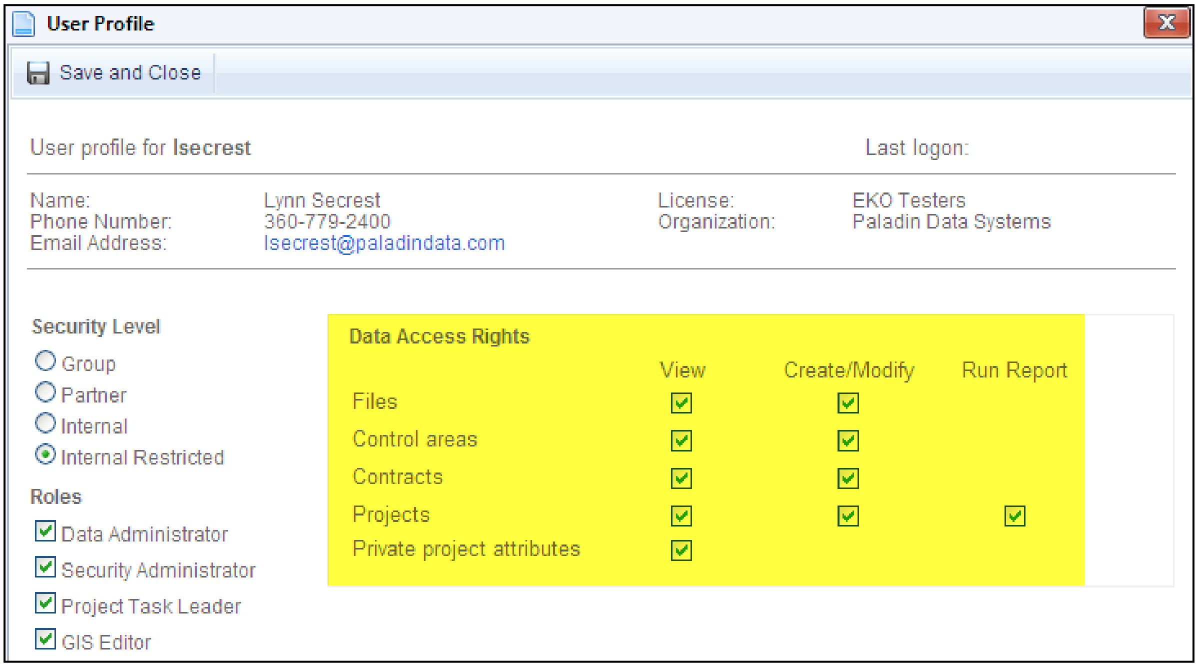
- Adds users name to the Project Task Leader Look-up List
- Searchable field

GIS Editor

- Access to the Mapping Module - GIS Browser
- Allows users to map projects

User Profile - Data Access Rights

Data Access Rights are determined on a attribute by attribute basis. These rights grant users permission to view, create/modify, and run reports on Files, Control Area, Contracts, Projects, and Private Attributes. Each organization will decide what level access will be granted to each individual user based on need. To control a user's Data Access Right, click on their name from the user list and click rights checkboxes as need:



View

- Ability to view all or some of the following: File repository, Control Areas, Contracts, Projects and Private project attributes

Create/Modify

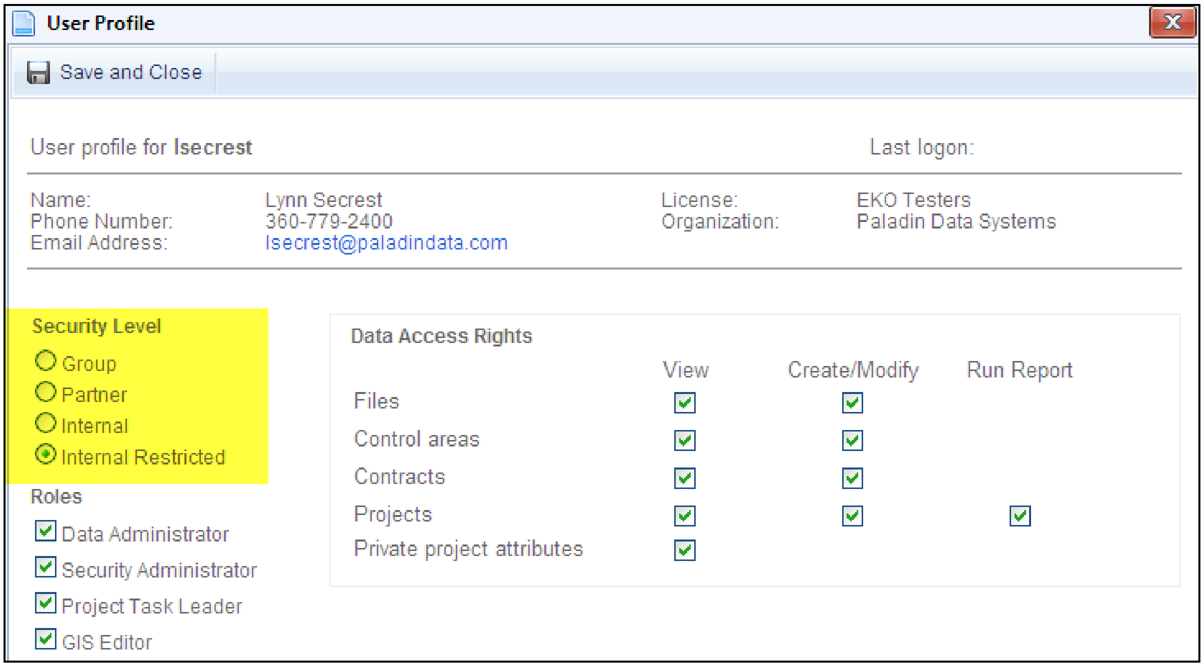
- Ability to view all or some of the following: File repository, Control Areas, Contracts, Projects and Private project attributes

Run Reports

- Ability to run reports on Projects

Data Access Security Level

The Security level determines the files, projects, and general information available to the user. EKO-System utilizes a hierarchy of security levels, listed in ascending order from least access to most; Group, Partner, Internal, and Internal Restricted. A user with a security level at Internal, will have access to all data set at Internal or below (Group and Partner), but not data set at the Internal Restricted level. To control a user's Data Access Right, click on their name from the user list and click rights checkboxes as need:



Group

- The lowest level of the security hierarchy, that only has access to the data set at the Public and Group levels.

Partner

- User has access to the data set at the Public, Group, and Partner levels.

Internal

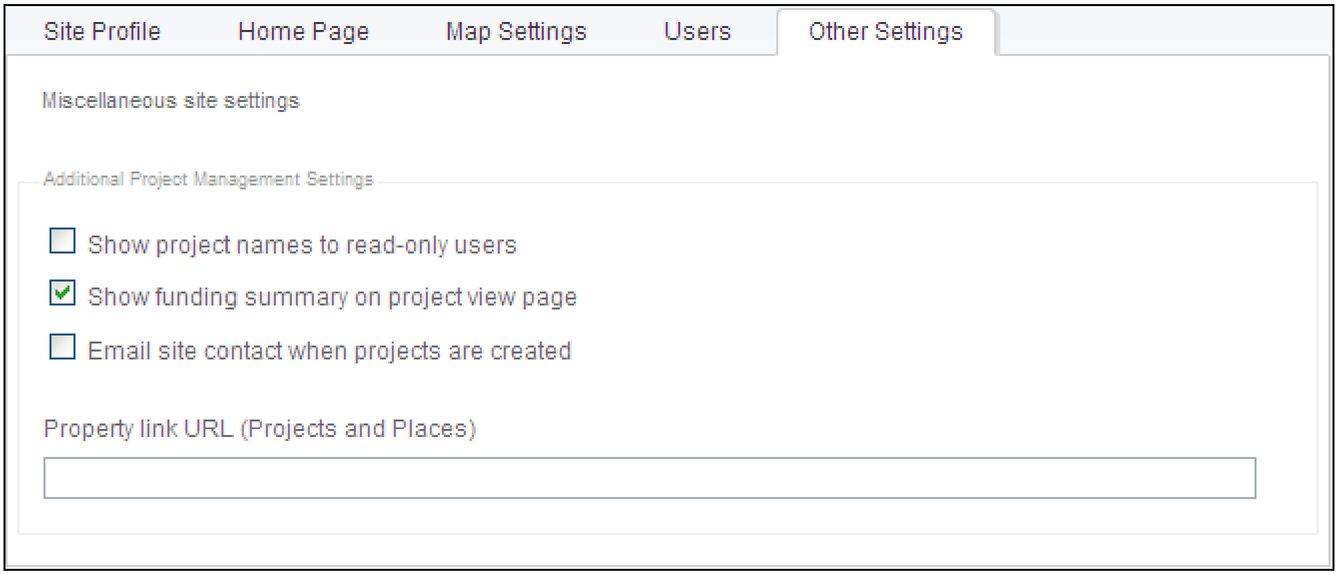
- User has access to the data set at the Public, Group, Partner, and Internal levels.

Internal Restricted

- The highest level of the security hierarchy and has access to all data.

2-5: Other Settings

Other site settings are configured from this page. These settings include the following:



Show project names to read-only users

- Check to display the names of projects to read only users.

Show funding summary on project view page

- Check to display funding information on the project view page

Email site contact when projects are created

- Check to email the person listed as the site contract on the Site Profile tab when projects are created

SECTION 3: DATA CONFIGURATION

Contract Configuration

Control Areas Configuration

File Configuration

People and Organization Configuration

Project Data

Reporting Codes/Measurement Configuration

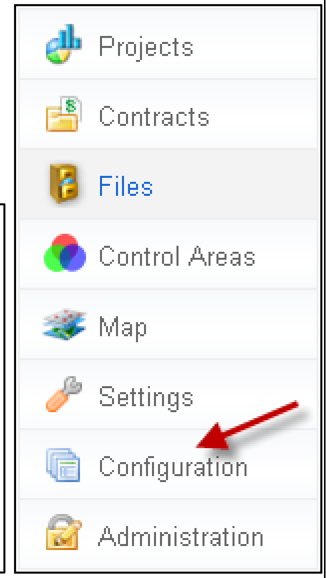
The Configuration module allows Data Administrators to configure EKO-System to track project, contract, and other information in specialized ways to meet their organizations unique requirements. Only users with the Data Administrator role have access to this module. Data Administrators will have the Configuration button in left toolbar.

This section will discuss the following topics:

- Contract Categories/Folders
- Contract Templates
- Control Area Categories/Folders
- File Folders/Categories
- People and Organization Roles
- People and Organizations
- Project Folders/Categories
- Project Secondary Status
- Reporting Code/Measurement Categories
- Reporting Codes/Measurements

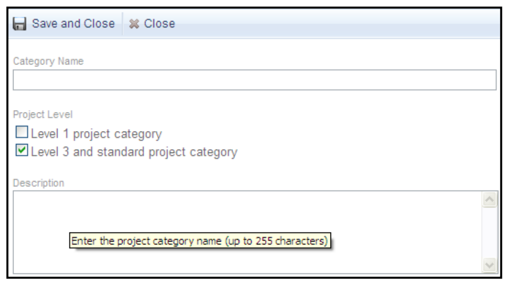
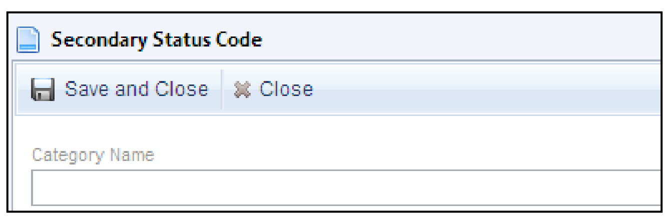
The Data Configuration menu is located in the on the main pages of the each of the applications modules. The Data Configuration menu is only available to users assigned the role of Data Administrator. Codes and Contacts to track information pertinent to projects will be entered via the Configuration Module. Once the data in entered it will populate lookup list and drop down menus throughout EKO-System.

EKO-System can be configured for multiple organizations at the System Configuration level. Only System Administrators at Paladin Data Systems can modify the System Configuration. All data configuration discussed in this section is at the datasite level and should be used in addition to the nation-wide configuration.



3-1: Projects

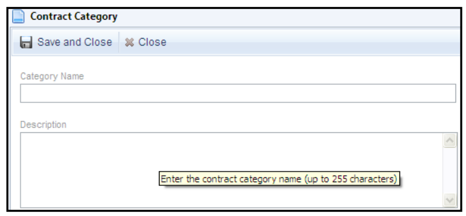
Project Categories organize the various types of projects into groups. Project Categories can be configured at either the Level 3 or Level 1 Project levels.

What to do:	How to do it:
Project Categories	a. From the Configuration main page, click the ***Folders/Categories*** link under the Projects heading b. Click the ***Add Category*** button c. Enter the ***Project Category name*** d. Provide a *Description* (optional) e. Select applicable project level (s) - The system defaults to Level 3 f. Click the ***Save and Close*** button 
Secondary Project Status	a. From the Configuration main page, click ***Secondary Status Codes*** b. Click the ***Add Secondary Status Code*** button c. Enter the name of the ***Status Code*** d. Click the ***Save and Close*** button 

3-2: Contracts

Contract Categories, like Project Categories, help organize contracts into groups of similar contracts.

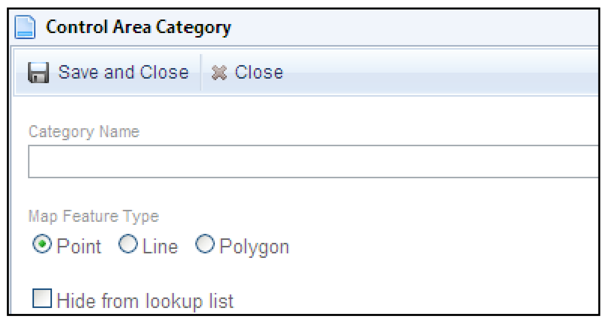
What to do:	How to do it:
Contract Categories	a. From the Configuration main page, click the ***Folders/Categories*** link under the Contracts header b. Click the ***Add Category*** button c. Enter a ***Contract Category*** name d. Enter a *Description* e. Click the ***Save and Close*** button



3-3: Control Areas

Control Area Categories group Control Areas together in thematic groups. All Control Areas stored in a Category must have the same geometry type (point, line, or polygon).

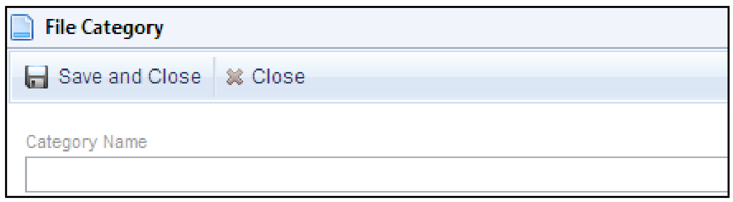
What to do:	How to do it:
Create Control Area Category	a. From the Configuration main page, click the ***Folders/Categories*** link under the Control Areas header b. Click the ***Add Category*** button c. Enter a ***Category name*** d. Select a ***Feature Type*** (Point, Line, or Polygon). **All Control Areas in the Category must be the same geometry type**. e. Check the *Hide from lookup lists* check box if applicable (optional). f. Click ***Save and Close***



3-4: Files

File Categories organize files into functional or thematic groups to assist with organization. File Categories are displayed as folders in the right navigation bar in the Files Module.

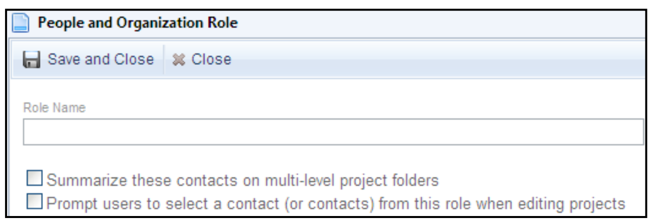
What to do:	How to do it:
Create File Category	a. From the Configuration main page, click the ***Folders/Categories*** link under the Files header. b. Click the ***Add Category*** button c. Enter a ***Category name*** d. Click ***Save and Close*** button to finish

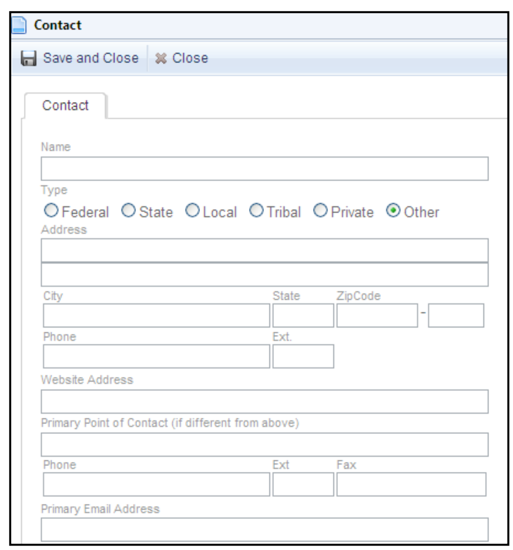


3-5: People and Organizations

In EKO-System a person or organization may serve more than one purpose. For example, a certain organization may be the funder, property owner, and partner. Setting up the roles will allow the user to assign as many roles as necessary. The People and Organizations menu contains the Contacts module. Contacts are created, edited and deleted in this module. Once the contact is created one or more roles can be associated with the contact all from this module.

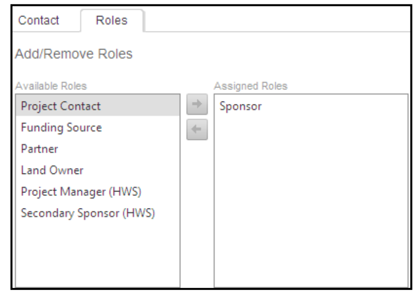
What to do:	How to do it:
Create People and Organization Role	a. From the Configuration main page, click ***Roles*** b. Click the ***Add Role*** button c. Enter the ***Role Name*** d. Mark checkboxes accordingly: • Check the *Summarize the contacts* box, if the contact is to be incorporated across the multi-level hierarchy projects • Check the *Prompt users to select box*, to display a link on the Project Face page prompting the user to update the field e. Click the ***Save and Close*** button to finish
Create Contact	a. From the Configuration main page, click the ***People and Organizations*** link b. Click the ***Add Contact*** button c. ***Contact*** tab • Enter the ***People and Organizations' Name*** • Select a ***Type of contact*** • Enter *contact information* (address, phone, email, etc.)





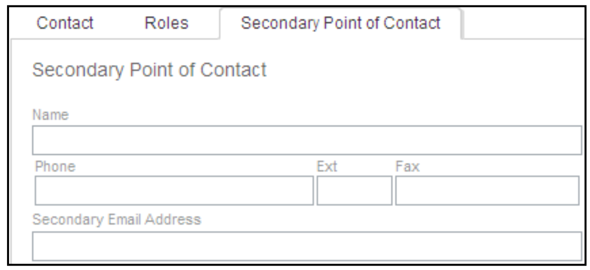
d. ***Roles*** tab

- Select from Available Roles
- Click Right arrow to add Role
- Click Left arrow to remove Role



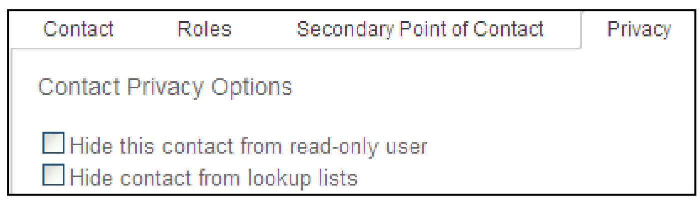
e. *Secondary Point of Contact* tab

- Enter *contact information* (address, phone, email, etc.)



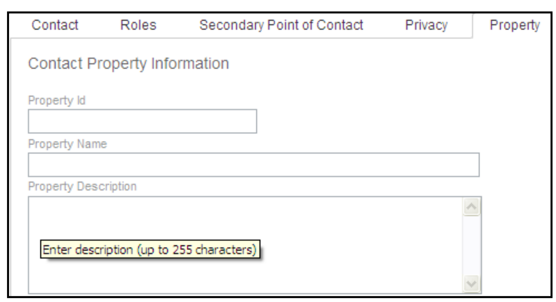
f. *Privacy* tab

- Hide this contact from read-only user
- Hide contact from lookup lists



g. *Property* tab

- Enter information if available



h. *Agreement tab*

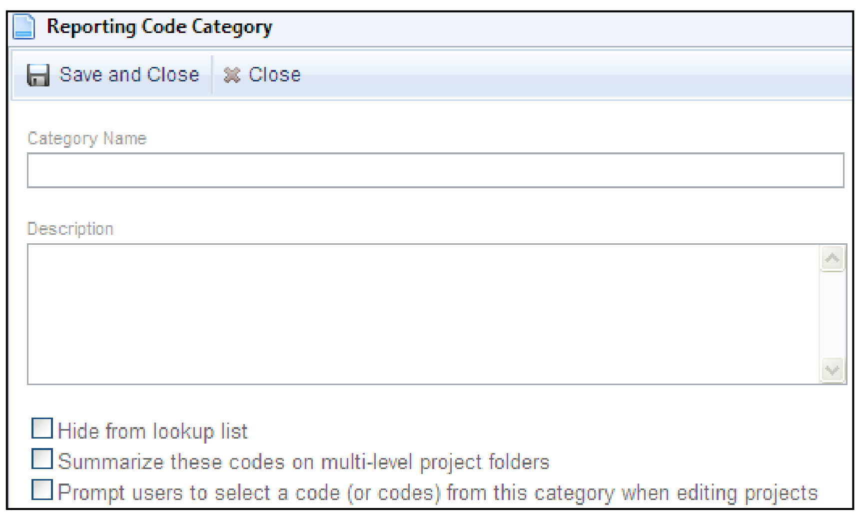
- Check the box to show there is an active agreement tied to contact

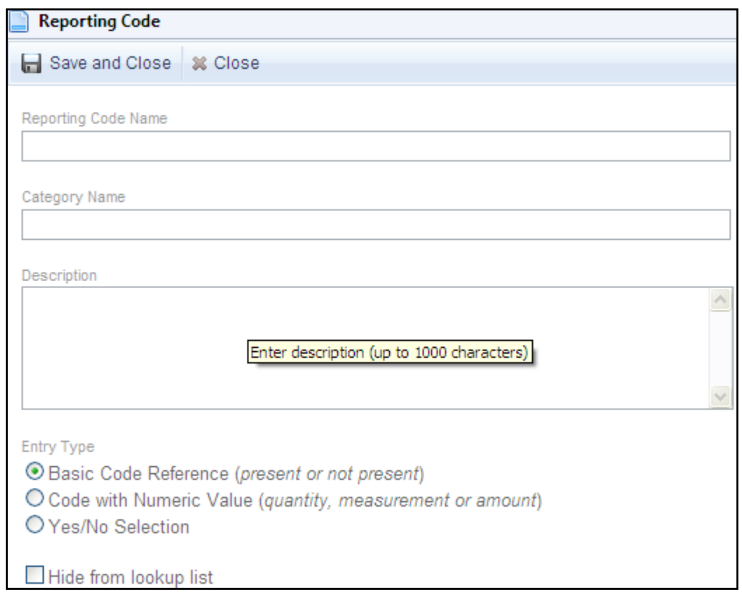
f. ***Save and Close***

3-6: Codes/Measurements

The Reporting Code Categories Menu allows data administrators to group Reporting Codes together into topical categories or groups. Reporting Code Categories are created, edited and deleted in this module. Once the Reporting Code Category is created, Reporting Codes can be entered into this category. The Reporting Code Category feature is designed to help organize codes, filter searches, and create reports. Assigning reporting codes to projects allows the user to then generate reports and track expenses.

What to do:	How to do it:
Create Reporting Code Category	a. From the Configuration main page click on the ***Codes/Measurement Categories*** link b. Click the ***Add Category*** button c. Enter a name in the ***Reporting Code Category*** field d. Enter a *Description* (Optional) e. Click the check boxes as appropriate • Check the *Hide from look-up lists*…box to keep the Category hidden during searches • Check the *Summarize these codes*… box to summarize Reporting Codes across multi-level hierarchy projects • Check the *Prompt users to select*…box to display a link on the Project Face page prompting the user to update the field f. Click ***Save and Close*** button to finish



What to do:	How to do it:
Create Reporting Code	a. From the Configuration main page, click the ***Codes/Measurements*** link b. Click the ***Add Reporting Code*** button c. Enter a ***Name*** d. Select a ***Code/Measurement Category*** from the lookup window e. Enter a *Description* (optional - 1000 characters) f. Select an ***Entry*** type • Basic Code (Present or not present) • Code with Numeric Value (Quantity, measurement, or amount) • Yes/No Selection g. *Hide from lookup list* (when applicable) h. Click the ***Save and Close*** button 

SECTION 4: FILE MANAGER MODULE

File Categories
Adding Files
Searching Files
Publishing Files

The File Manager allows the user to upload, store and share documents, photos *(jpeg/gif/png)*, and URLs without associating them with a particular project. It also stores copies of Project Files if the <u>Add to File Repository</u> option was used.

Grouping files together in File Categories/Folders will enable quicker and more efficient searches in the future and provides an organizational structure for files published to the Public Portal.

This section consists of the following information:

- Creating categories to organize files
- Adding files to the File Repository
- Searching for files using various methods such as keywords and timelines
- Publishing Files to the Public Portal

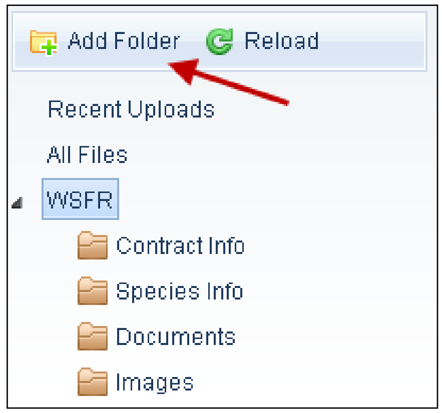
4-1: File Categories

What to do:	How to do it:

Create a File Category

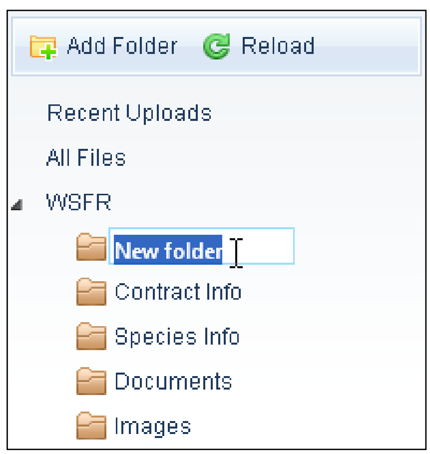
a. Launch the ***File Manager*** module by click on the ***Files*** button on the left navigation bar

b. Click the ***Add Folder*** button on the right navigation bar



c. The new ***File Category*** will now be displayed in the right navigation bar

d. Enter the name of the ***File Category*** by clicking on the text next to the folder icon



e. Enter the name of the ***File Category***

4-2: Add Files and Links

What to do:	How to do it:

Add a file

a. Click the **Add File** button on the toolbar

b. Click the **Select** button to add a file

c. Select a file using the ***File Browser***

d. Click the ***OK*** button

e. Click the **Continue** button

f. If the title is incorrect, enter a name in the ***Title*** field

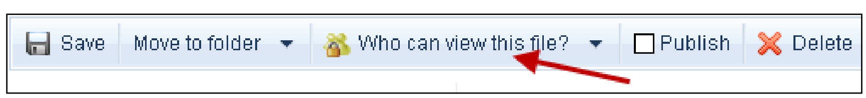
g. If the author is incorrect, enter a name in the **Author** field

h. If the File Date is incorrect, press the edit button next to the date and enter the correct date.

i. Optional Information

- Enter Search **Tags**

j. Set the **File Security Level** by clicking on the ***Who can view this file?*** Button and selecting the appropriate file security.



k. To publish the file, click the **Publish** checkbox

What to do:	How to do it:
Add a Link	a. Click the **Add Link** button on the toolbar

b. Paste or enter a webpage address

c. Click the Continue button

- If the title is incorrect, enter a name in the ***Title*** field
- If the author is incorrect, enter a name in the **Author** field
- If the Link Date is incorrect, press the edit button next to the date and enter the correct date.

d. Optional Information

- Enter Search Tags
- Set the Link Security Level by clicking on the Who can view this file? Button and selecting the appropriate file security

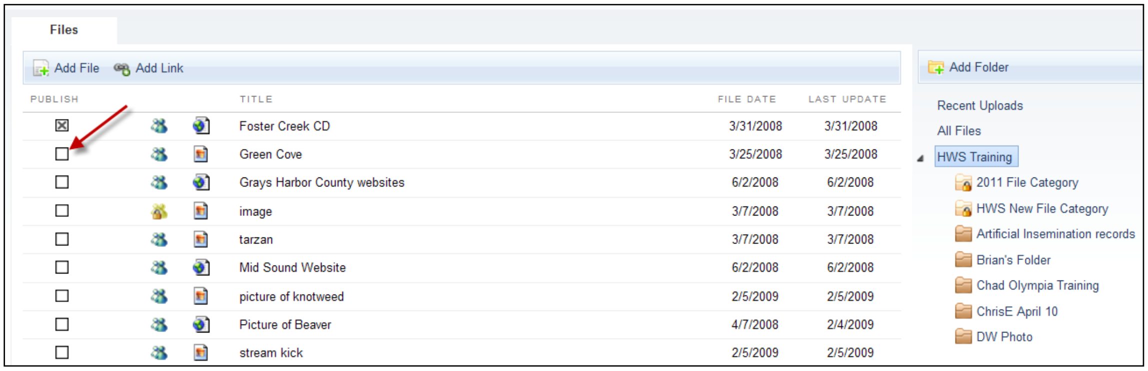
e. To publish the file, click the Publish checkbox

4-3: Publish a File/Link

EKO-System implementations may include a Public Portal, which allows each organization to display projects and provide supporting documentation to the local community, funders, sponsors, and other types of entities.

To display documentation on the Public Portal, the security level needs to be updated to Public level.

Files published to the Public Portal are organized in File Categories and sorted in descending order by date (newest first, oldest last).



What to do:	How to do it:
Publish a file/link	a. Select the **Publish** checkbox • The security level changes to public • The file is now available on the Public Portal • A link also displays on the database homepage (files display in descending date order)
Un-Publish a file/link	a. Deselect the **Publish** checkbox b. Click the **File** name c. Click the **Edit** button d. Click **Security** e. Select the appropriate **Security Level**

4-4: Search for File

What to do:	How to do it:
Search for a file	a. Click the **Files** tab on the search box located in the upper right hand corner  b. **Enter search text**; press **Enter** or click magnifying glass to search

SECTION 5: PROJECT MANAGER MODULE

Create a New Project

Edit Projects

Create a Project Template

Publish Projects

Project Reports

In this section, we learn about a core function of ***EKO-System***, storing and reporting on project information. Information entered at the project level is used for tracking, management, reporting, and display in every section of the system. Using Reporting Codes and quantifying Goals and Objectives assists with all of the functions listed above. Understand how to create a project, and what role project information plays in your datasite, will help you understand other core functions of EKO-System.

This section consists of the following:

- Creating a new project
- Entering project attributes
- Assigning People and Organizations
- Using Report Codes
- Creating Budget, Funding, and Expense entries
- Creating and assigning Tasks

Examine Projects

Before projects are added to a datasite, a brainstorming session should occur within the user's organization. Some of the topics that need to be discussed are project names, categories, what are our reports, who maintains the data, and so on. Once the groundwork is laid, data entry can begin.

If you received the Getting Started guide and provided information to Paladin Data Systems, much of this information may already be setup in the database as part of the initial configuration. If not, at a minimum, you will need to enter the following information in order to create projects in the ***EKO-System:***

- Project Categories
- People and Organization Roles
- People and Organizations
- Contracts
- Reporting Code Categories
- Reporting Codes
- Secondary Status Codes

NOTE: Projects are populated using various lookup lists throughout the system so lists of project related data, such as funding information, contact names, reporting codes and categories **MUST** be created via the Configuration module **BEFORE** these data elements can be added to projects.

5-1: Create a Project

This section will discuss the methods for creating a project in EKO-System. There are two types of projects:

- **Standard project** - a standalone project not associated with another project
- **Multi-level project** - a project that is associated with another project by selecting the appropriate folder

EKO-System provides a Project Wizard to help the user create both types of projects.

To reach the Project Wizard enter the ***Projects*** module and click the ***Add Project*** button.

There are two options for creating the project:

- Empty projects are projects created from scratch. All information will need to be added.
- Project templates (once created) can be used to create projects that have similar information (e.g. objectives, tasks, and reporting codes)

NOTE: To create a project template an empty project needs to be created then the ***Save Copy as Template*** option needs to be selected. See Create a Template.

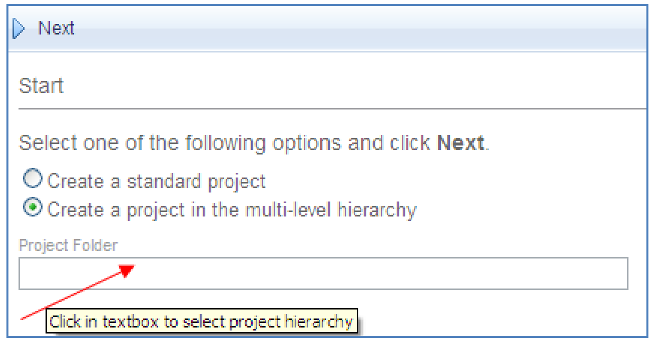
What to do:	How to do it:

Create a Multi-level Project – Project Wizard

Step 1 - Select Project Type

a. Click the ***Add Project*** button

b. Toggle to the ***Create a project in the multi-level hierarchy*** radio button

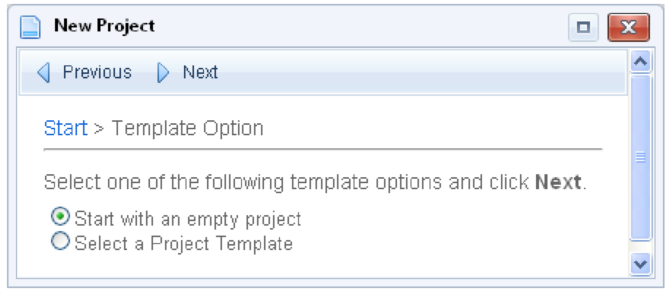


- Click the **Project Folder** field
- **Select a Project** in the Multi-level Hierarchy to make the new project a child of this Project
    - Select a Level 1 Category to create a Level 1 Project
    - Select a Level 1 Project to create a Level 2 Project
    - Select a Level 2 Project to create a Level 3 Project

c. Click ***Next***

Step 2 - Template Option

a. Toggle to the ***Start with an empty project*** radio button

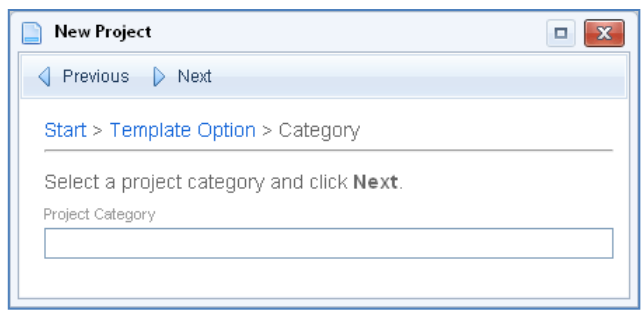


b. Click ***Next***

NOTE: To create a project with a template, an empty project needs to be created, then the Save Copy as Template option needs to be selected. See Create a Template.

Step 3 - Select a Project Category

a. Select a ***Project Category*** from the lookup list



b. Click ***Next***

NOTE: Project Categories are not assigned to Level 1 or 2 Projects

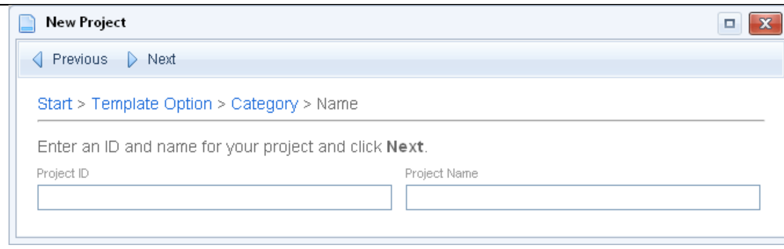
Step 4 - Identify the Project

a. Enter a ***Project ID***

- Assign a project ID that is intuitive to the organization
- Alpha/numeric combination
- Symbols permitted
- 13 characters maximum

b. Enter a Project Name

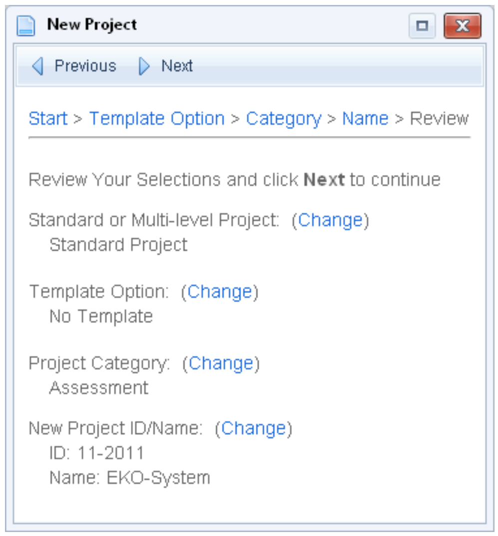
- Assign a Project Name that is descriptive of the project
- Can be an alpha/numeric combination
- Symbols permitted
- 80 characters maximum



c. Click ***Next***

Step 5 - Review

a. Click Change to make any edits before creating the project



b. Click ***Next*** to create the project

c. Click *Cancel* to exit without creating a project

NOTE: Once created it is time to Enter the Project Information.

Create a Multi-level Project – From Project Face page

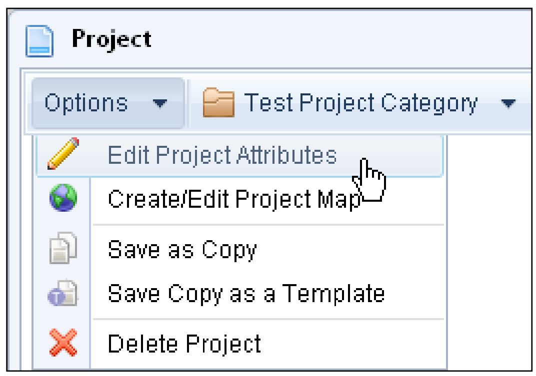
Once the Level 1 and 2 projects are created lower level projects can be created right from the Project face page. Click the Create a Project in this folder link and follow the steps of the Wizard similar to the preceding sections.

Attach a Standard (Level 3) Project to the Multi-level Hierarchy

Once a standard project has been created it can be attached to a Level 2 which converts the standard project to a Level 3 project and places it in the hierarchy.

a. Open the Project

b. Click the ***Options*** button from the toolbar



c. Click ***Edit Project Attributes***

d. Click the ***No Project Folder Selected*** link at the top of the page

e. Expand the ***Project Category*** folder list

f. Click the ***Select*** link next to the appropriate Project you want the project you are editing to reside in

g. Click ***Save and Close***

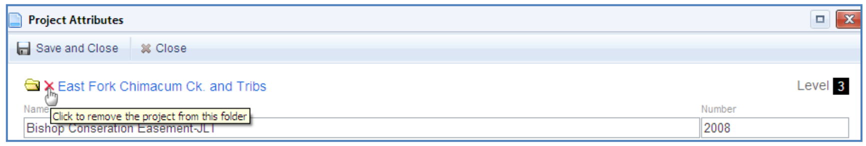
Detach a Standard (Level 3) Project from the Multi-level Hierarchy

Once a standard project has been attached to a Level 2 it becomes a Level 3 project. To remove that level 3 project from the Multi-level hierarchy folder; the level 3 project needs to be converted back to a standard project.

a. Select the ***Project***

b. Click the ***Options*** button on the toolbar

c. Click ***Edit Project Attributes***



d. Click the ***red X*** next to the folder icon to remove the project from this folder.

e. A warning displays, ***click OK***

5-2: Enter Project Information (no template)

Once all the steps of the wizard are complete the attributes page displays; information pertinent to the project can now be added. To access this page from the Project face page, click the Options menu and select Edit Attributes from the menu.

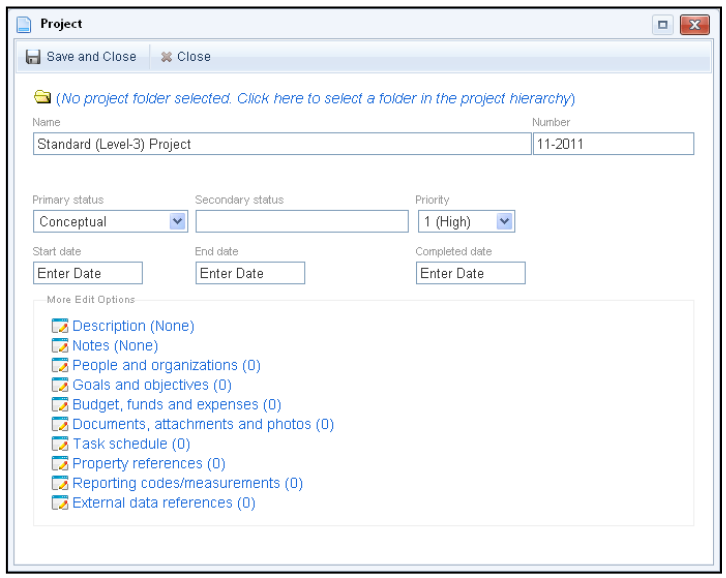
5-3: Project Attributes

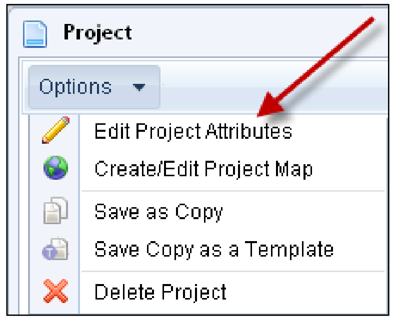
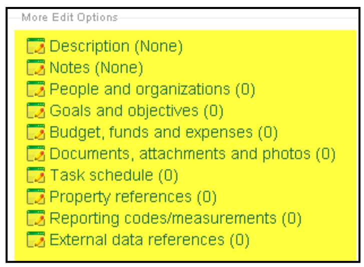
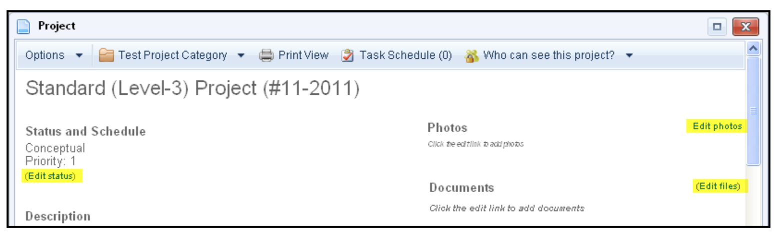
Project attributes can be entered from two data entry pages, the Project Face page and the Project Attributes page. Attributes can be entered from either of these pages; however the following sections will explain the process beginning from the Project Attributes page. To edit any data from the project face page, simply click the blue Edit hyperlink next to the data element you wish to edit.

Project attributes are displayed based upon the Project Category Level. Because of the roll up option featured in ***EKO-System,*** most project attributes are maintained at the Level 3 or standard project level.

Project Attributes are as follows:

- Description
- Notes
- People and Organizations
- Goals and Objectives
- Budget, Funds and Expenses
- Photos and Documents
- Task Schedule
- Property References
- Reporting Codes/Measurements
- External Data References

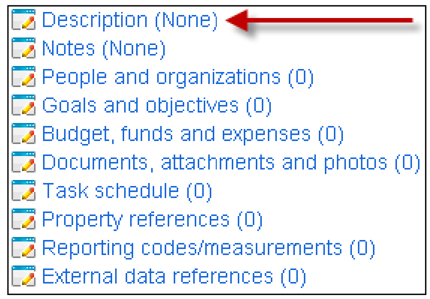


What to do:	How to do it:
Project Attributes Page NOTE: <u>The Project Wizard will display this page by default</u>	a. Click **Options** on the Project View Screen • Click ***Edit Project Attributes***  • Edit any of the fields or click a hyperlink 
Project Face Page	a. From the Project Attributes Pages, click ***Save and Close*** b. Click <u>Edit</u> under the applicable section on the Project View Screen  c. Make appropriate changes d. Click ***Save and Close*** e. Click *Close* to exit without saving changes

Project Description

Enter pertinent information about the project. The screen allows up to 4000 characters. This attribute is available on all three levels.

What to do:	How to do it:
Enter Project Description	a. Click the ***Description*** hyperlink or the Edit Description link from the Project face page.



b. Enter the ***Description***

c. Click ***Save and Close***

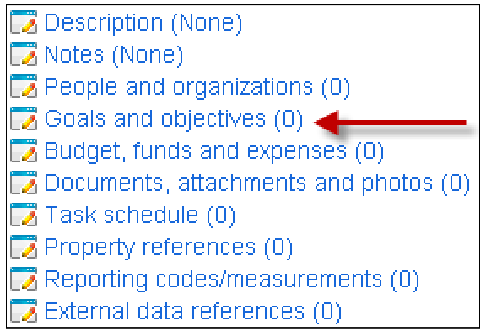
Goals and Objectives

Use the description field of goals and objectives to relay information about the intent of the project. The progress and outcome can be entered in text form in the results field. The user may also use charts and graphs to track goals and objective if the goal is quantifiable. This attribute is available on all three levels.

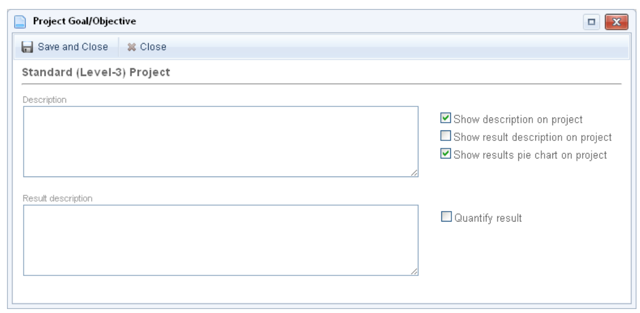
What to do: **How to do it:**

Create Goals and Objectives

a. Click the ***Create Goal/Objective*** hyperlink



b. Click the ***Add Goal/Objective*** button



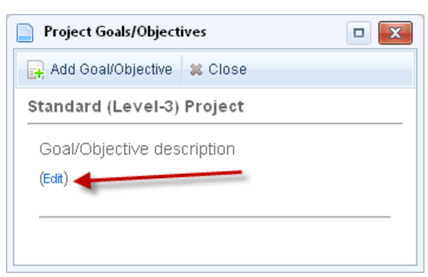
c. Enter a ***Description***

d. Enter ***Results*** description

e. Press ***Save and Close***

Edit Goal/Objective

Once goal has been saved click the ***Edit*** link to make changes to the goal and objective.



Quantify Goals and Objectives

Goals and Objectives can be quantified in two ways; manually or automatically using reporting codes. Automatically quantifying your project's Goals and Objectives using a Reporting Code ensures that the information you enter can be rolled up to higher level projects in the multi-level hierarchy. Steps to quantify Goals and Objectives using both approaches are below.

What to do:	How to do it:

Quantify Results (Manually)

a. Check the ***Quantify Result*** box

b. Select a ***Quantify Mode***

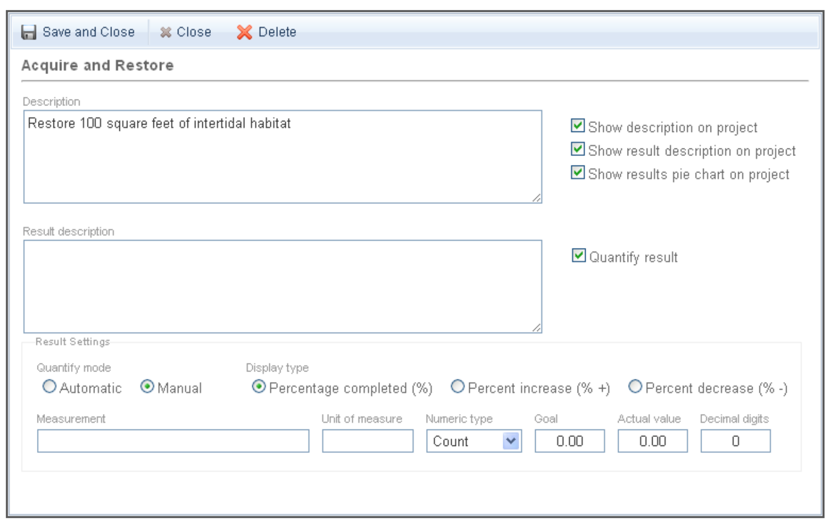
c. Click ***Manual*** to quantify the Goal manually (does not roll-up in multi-level hierarchy)

- Enter *Unit of measure* (e.g. trees)
- Format *Numeric Type* (count, money, decimal)
- Enter *Decimal Digits*
- Enter *Goal*
- Enter *Actual value*

d. Check the applicable box(es) to *Show in Project View*

e. Click ***Save and Close***

f. Click *Close* to exit without saving changes



Quantify Results (Reporting Codes)

a. Check the ***Quantify Result*** box

b. Select a ***Quantify Mode***

c. Click ***Automatic*** to quantify the Goal using a Reporting Code (does not roll-up in multi-level hierarchy)

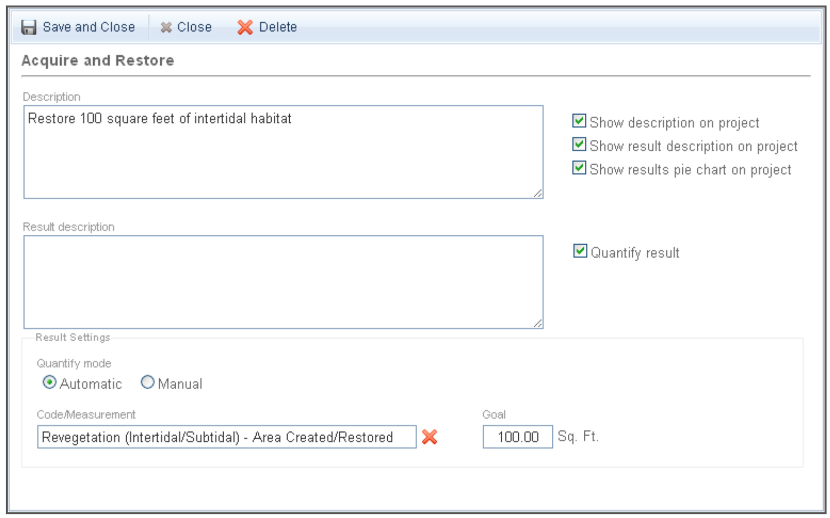
a. Select a ***Reporting code*** from the drop down list

b. Enter ***Goal***

c. Actual Value computed automatically from reporting code (s) updates within project (s)

d. Click ***Save and Close***

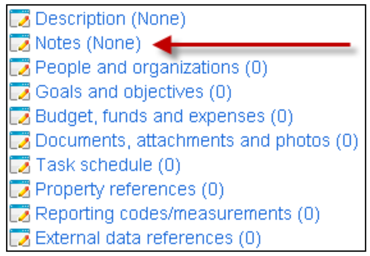
e. Click *Close* to exit without saving changes



Notes

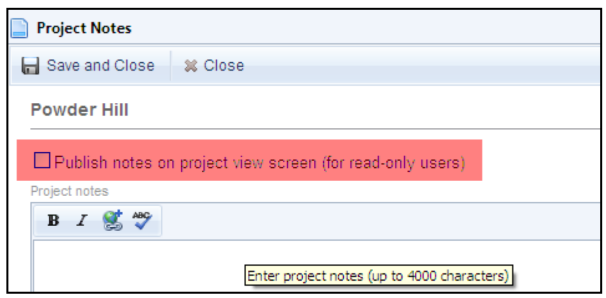
Use the **Notes** field to enter additional data about the project. This information can be shown to read only users via the project face page by selecting the checkbox.

What to do:	**How to do it:**
Create Notes	a. Click the ***Notes*** hyperlink



b. Enter ***information in the Notes field***

c. Check the *Publish Notes* button if desired



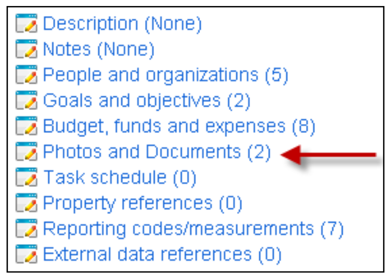
d. Click ***Save and Close***

NOTE: This attribute is available on all three levels.

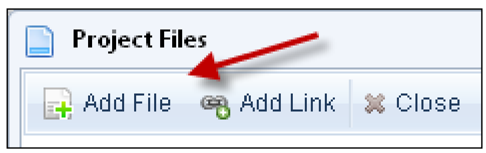
Photos, Documents and Links

Click the ***Files*** hyperlink on the project edit screen to attach documents, photos, reference materials and any other information useful in managing the project. There is an option to save a copy of the file in the File Manager by checking ***Add to File Repository***.

What to do:	**How to do it:**
Add a Project File or Photo	a. From the Project Attributes Screen, click the ***Photos and Documents*** link



b. Click the ***Add File*** button



c. Click ***Select*** button to open the File Browser

d. Double-click the file or select it and click the ***Open*** button

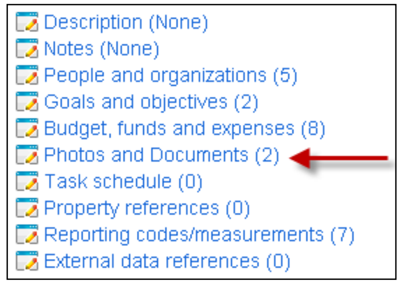
e. Press the ***Continue*** button

f. Enter a file *Date* (use the file date to determine the display order of files - descending sort)

g. Enter a *Description*

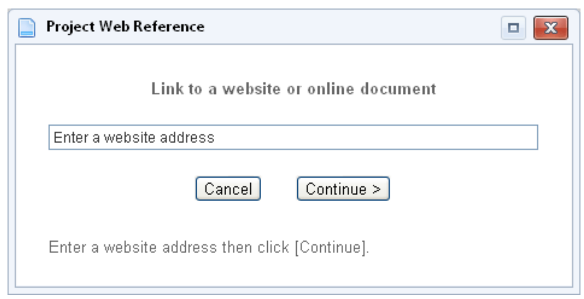
h. Click ***Save and Close***

What to do:	How to do it:
Add a Project Link	a. From the Project Attributes Screen, click the ***Photos and Documents*** link



b. Click the ***Add Link*** button

c. Paste or type a web address into the textbox



d. Press the ***Continue*** button

e. Enter a file *Date* (use the file date to determine the display order of files - descending sort)

f. Enter a *Description*

g. Click ***Save and Close***

What to do: | **How to do it:**

Add Project File or Link to File Repository

a. After adding a file to a Project, check the ***Add to File Repository*** box

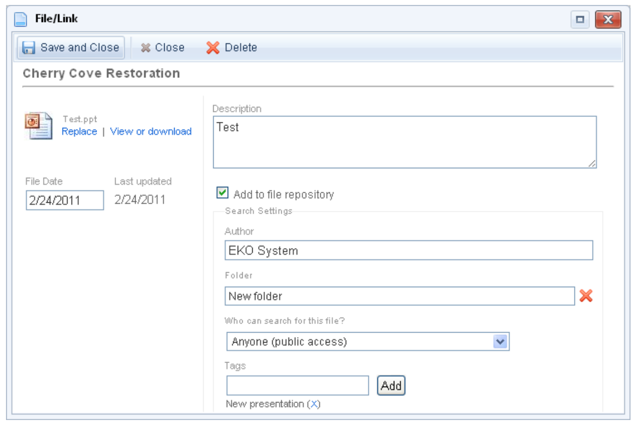
b. Enter ***Author*** (s) name

c. Select a *File Folder* (File categories are created in the File Manager Module)

d. Set the ***Access Level***

e. Enter *Tags* (s) to aid in searches

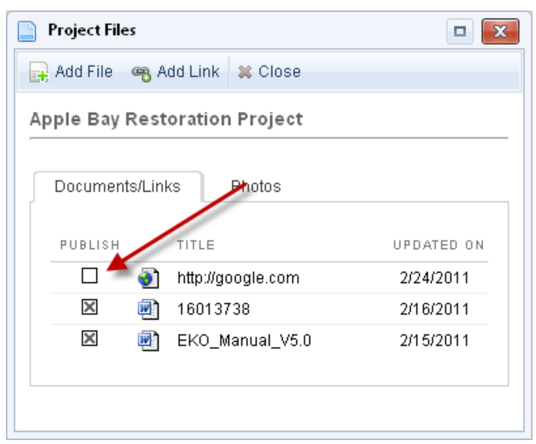
f. Click ***Save and Close***



Publish File on Project Face Page

a. From the Project Attributes Page, click the Photos and Documents link

b. Click the ***Publish*** checkbox next to the File, Photo, or link you want to publish to the Project Face page



People and Organizations

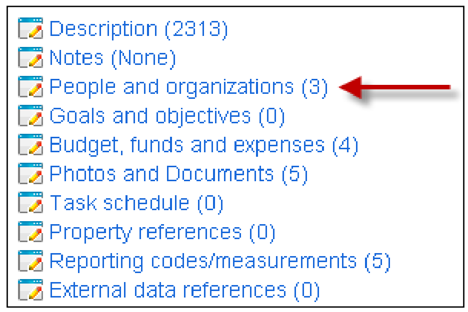
A project may contain several different contacts. All contact information is stored in People and Organizations. Contacts are added to Level 3 and standard projects only and then rolled-up to projects at higher levels in the hierarchy.

NOTE: <u>This attribute is only available on Level 3 and Standard Projects</u>.

What to do:	How to do it:

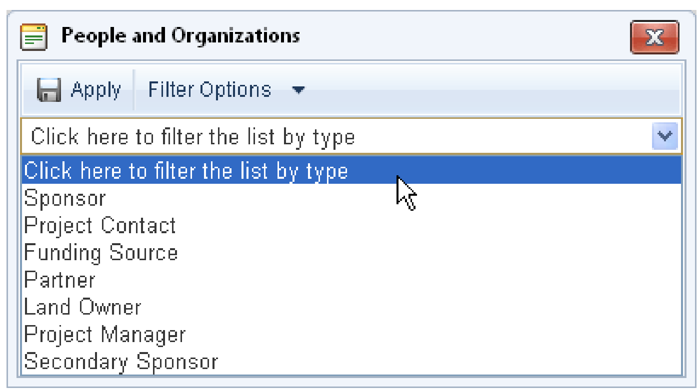
Assign Contact to the Project

a. From the Project Attributes screen, click ***People and Organizations*** hyperlink



b. Click the ***Add Contact*** button

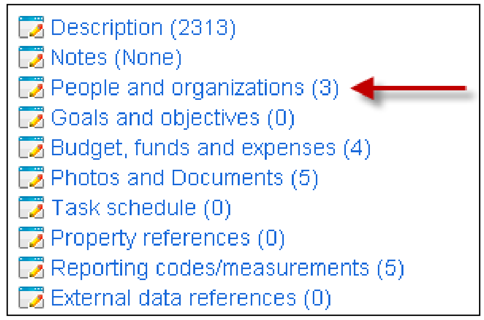
c. Filter the search by Selecting a Role



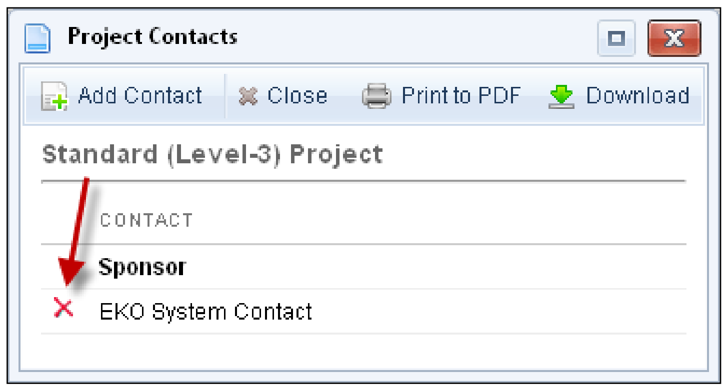
d. Select one or more contacts from list by clicking the

e. Click ***Apply***

What to do:	How to do it:
Remove Contact from a Project	a. From the Project Attributes Screen, Click ***People and Organizations*** hyperlink



b. Click the **red X** next to the contact



NOTE: After the contact is added it displays on the People and Organizations page. To delete, click the X in front of the contact.

Reporting Codes and Measurements

Reporting codes are assigned to projects and project tasks (basic and subtask only) to describe project activities and information. These codes are used to generate project reports and quantify results for project Goals and Objectives. Reporting codes are also search-able when looking for project information and can be summarized throughout the Multi-level Hierarchy.

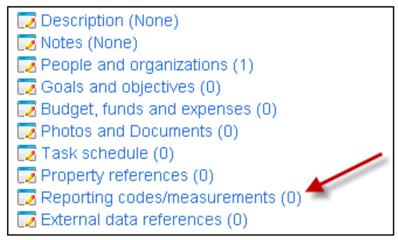
NOTE: <u>This attribute is only available on Level 3 and Standard Projects</u>.

What to do:	How to do it:

Add a Reporting Code/Measurement

a. From the project attributes screen, click the ***Reporting Codes/Measurements*** hyperlink

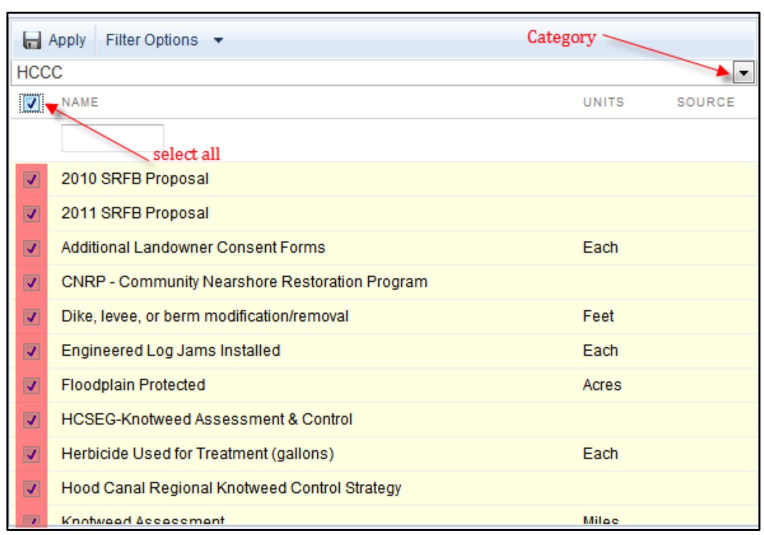
b. Click the **Add Code/measurements** link



c. Click the ***Add Code*** button

d. Filter search by clicking the Select by Category drop-down menu and selecting a ***Reporting Code Category***

e. Select individual ***Reporting Codes*** by clicking the checkbox or click the ***Select All*** checkbox

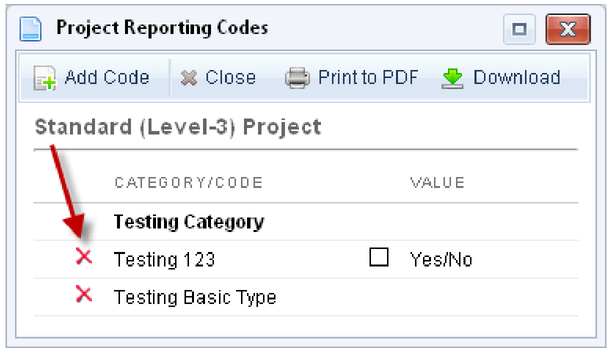


f. Click **Apply**

Remove a Reporting Code/Measurement

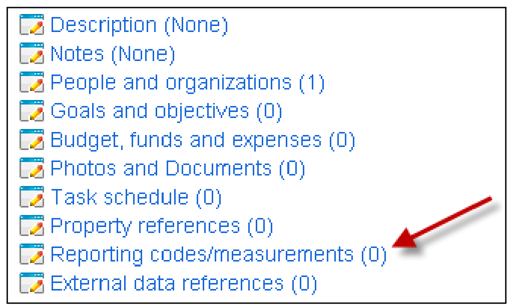
a. From the Project Attributes Screen, click the **Reporting Codes/Measurements** hyperlink

b. Click the **red X** next to the reporting code



Edit a Reporting Code/Measurement

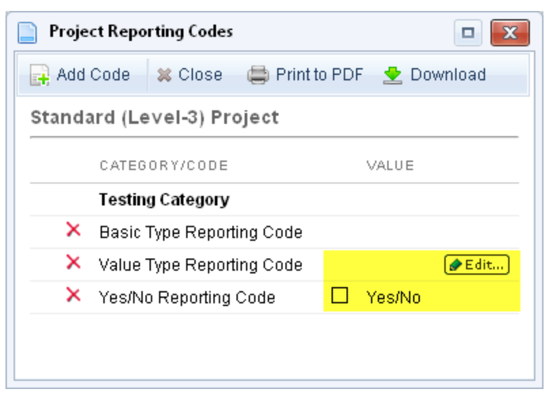
a. From the Project Attributes screen, click the ***Reporting Codes/Measurements*** hyperlink



b. Click the ***Edit*** button next to the reporting code to enter numeric value

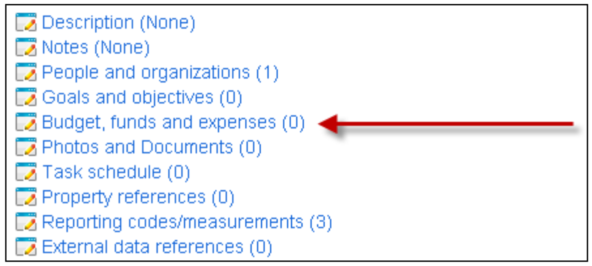
c. Click the ***Yes/No*** checkbox to indicate the Yes value

d. Click the ***Close*** button

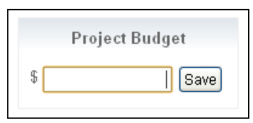


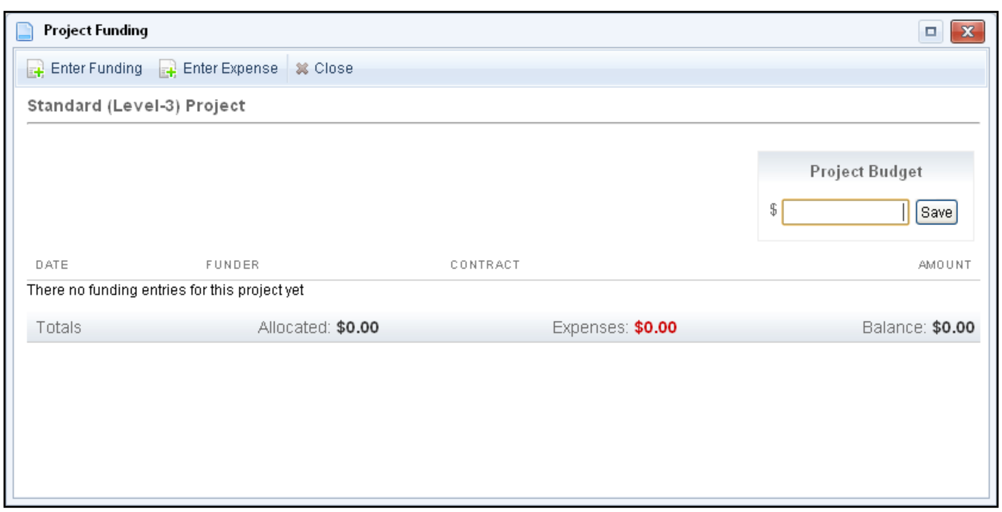
Budget, Funds, and Expenses

Project budget, funding, expenses, and contracts can be tracked throughout the life of a project. To create funding entries click the Budget, Funds, and Expenses hyperlink from the Project Attributes Screen.



NOTE: This link is only available on Level 3 and Standard Projects.

What to do:	How to do it:
Assign Project Budget	a. From the Project Attributes Screen, click the ***Budget, funds and expenses*** hyperlink b. Enter amount (numbers only) in ***Project Budget*** field  c. Click the ***Save*** button



What to do:	How to do it:
Add a Funding Entry	a. From the Project Funding Screen, click the ***Enter Funding*** button

b. Enter ***Entry Date*** (defaults to today)

c. Select a ***Funding Source*** from lookup list (if no funding source has been assigned click the *Add funder* link to add a funding source.

d. Select a ***Contract*** (optional) if a Contract is tied to the funding source.

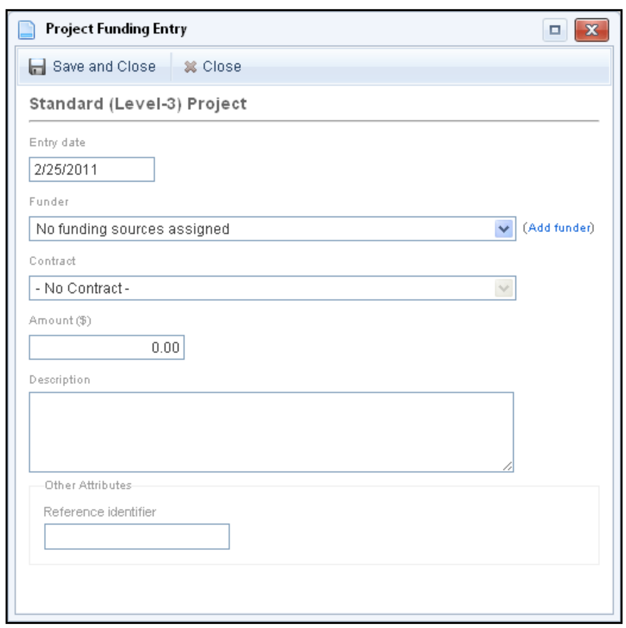
e. Enter an ***Amount*** (do not enter $)

f. Enter *Description* (optional)

g. Enter *Reference info* (optional)

h. Click ***Save and Close***

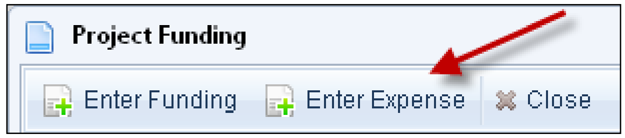
i. Click *Close* to exit without saving changes



What to do:	How to do it:

Add Expense Entry

a. From the Project Funding Screen, click the ***Enter Expense*** button



b. Enter the expense entry ***Date*** (Defaults to today)

c. Select ***Funding Source*** from lookup list

d. Enter ***Amount*** (do not enter $ sign)

e. Select a *Reporting Code* (if applicable)

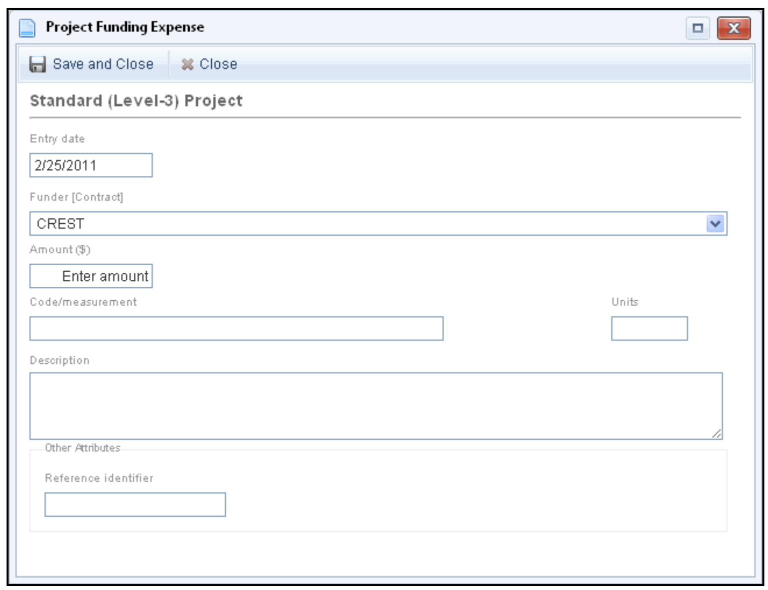
- Enter Reporting Code *Units* (if applicable)

f. Enter a *Description* (optional)

g. Enter *Reference Info* (optional)

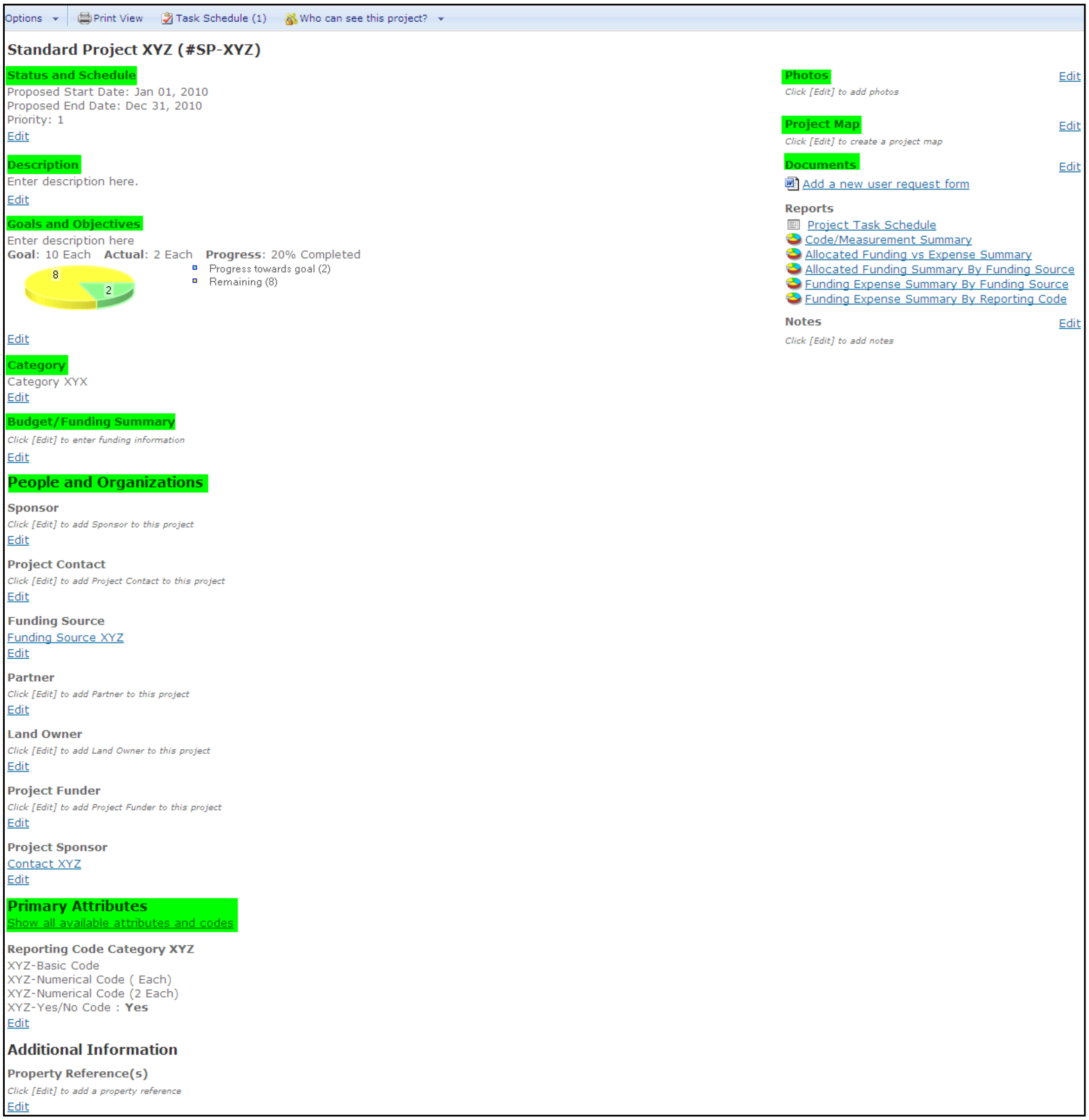
h. Click ***Save and Close***

i. Click *Close* to exit without saving changes



5-4: View Project Information (Standard)

Once all information has been entered on the project attributes page, click ***Save and Close***. ***EKO-System*** defaults to the **Project View Screen** with a project security level of Region/Guest. From this screen, users can view all attributes of the Project. The fields highlighted on the project face page are the same as the fields Options >Edit Attributes.

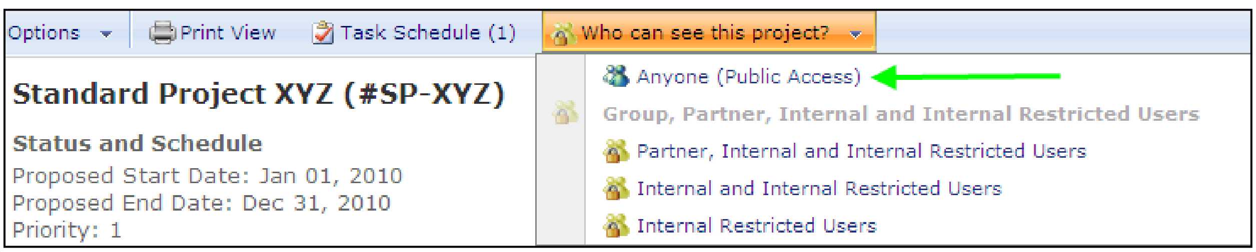


5-5: Publish Projects

EKO-System may include a Public Portal which allows the organization to relay project information to the community, funders, sponsors, and other types of entities.

To display a project on the portal the security level of the projects needs to be updated to the proper access level.

What to do:	How to do it:
Publish Project	a. Launch the ***Project Face Page (Project View Screen)*** b. Click the ***Who Can See this Project*** button c. Select ***Anyone (Public Access)*** d. Click ***Save and Close***



5-6: Project Templates

Project Templates help to standardize and expedite project data entry. Project templates are created using existing projects and duplicate objectives, tasks, reporting codes, contracts, and contacts. Using Project Templates is a great way to speed-up data entry for multiple projects that have similar attributes.

What to do: | **How to do it:**

Create a Template

a. Create an empty project

or

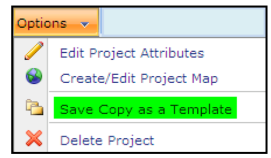
b. Select an existing project from the list

c. Click ***Options*** on the Project View Screen

d. Click ***Save a Copy as a Template***

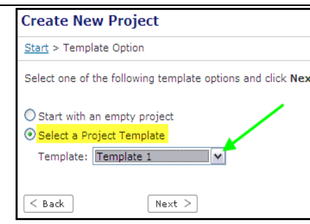
e. Enter ***Template Name***

f. Click ***Save and Close***



Create a Standard or Level 3 Project from Template - Project Wizard

Use the ***Select a Project Template*** option in the Project Wizard. Once all the steps of the wizard are complete the Project Edit page displays. All project information can now be added.



Enter Project Information (template)

Project templates can be used to save time if there are many projects of the same type or with similar information.

See enter Required Items

See enter Project Attributes

Edit Template Attributes

Users can edit the attributes that a template stores as data entry requirements change.

a. Open the ***Projects*** module

b. Click on ***Project Templates*** in the right navigation

c. Click on a ***Template*** from the template list

d. Edit Template Attributes, same as Editing Project Attributes

SECTION 6: PROJECT MAP

Map Projects

Create Geographic Features

Load Shapefiles

Create Annotation

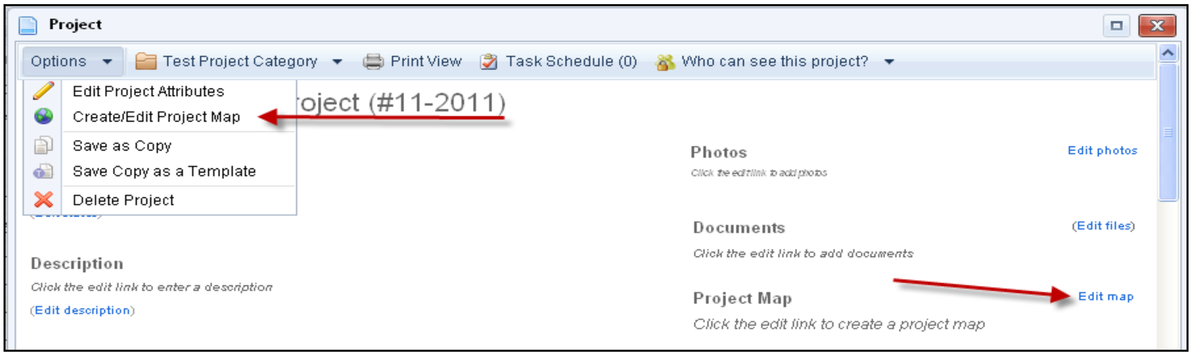
Attached Control Area to Project

Once projects have been created, the location can be mapped. Creating a project map helps to communicate the project's spatial context and is critical to generating reports using the GeoRegion feature. The EKO-System GIS Browser allows users to create maps, save them in their project, or download them as images. Maps can be created using points, lines, and polygons to display to position of project features. Map Settings can be adjusted to meet the needs of the user.

This section consists of the following exercises:

- Creating a project map
- Creating geographic features (points, lines, and polygons)
- Creating features from existing shapefiles
- Creating map annotation
- Attaching Control Area to a Project
- Saving your map

6-1: Project Map Feature (s)



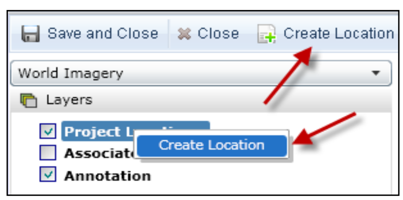
What to do:	How to do it:

Create a Project Location

a. From the Project Face page, click ***Options>Create/Edit Project Map*** or click ***Edit map*** in the Project Map section.

b. Right-click ***Project Locations>Create Location*** or click the ***Create Location*** button and select the feature type

- If the Create Location option is chosen, simply sketch the feature on the map



c. The new Location will now be in the Details box. The user may now map the location.

d. Right-click on the Location in the *Details* box and click *Edit Location*

e. Enter a *Name* in field

f. Enter a *Description*

g. Add *Geographic Region* (optional)

h. Enter *Map Information* (optional)

i. Enter *Reference Information* (optional)

j. Check the *Hide* box if applicable

k. Click ***Save and Close***

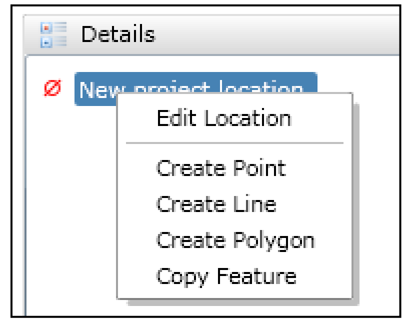
NOTE: If ***Set Automatically*** is checked the geographic information will auto-populate once the location is created on the map.

What to do: | **How to do it:**

Create a Map Feature Object

Right-click the ***Location Name*** to reach the shortcut window

a. Edit location - displays the Project Location page



b. Choose Feature Type

- ***Create Point***

  or

- ***Create Line***

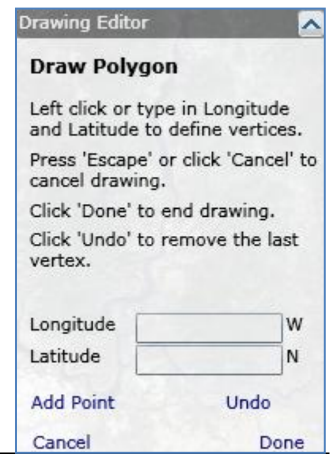
  or

- ***Create Polygon***

  or

- ***Copy Feature***

c. ***Draw*** directly on the map or ***Enter Coordinates*** of vertices

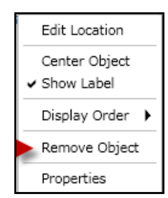


   a. ***Copy Feature***: To copy a feature from Shapefile or service, you will need to load or display a feature on the map first, select the Copy Feature option in step two, and then click on the feature you wish to copy.

d. Right-***click*** the map or click ***Done on the drawing editor box***

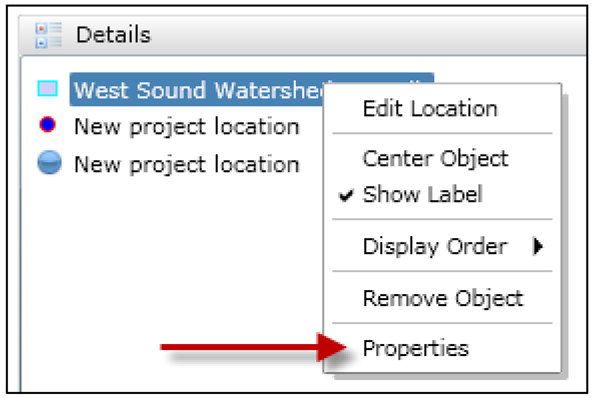
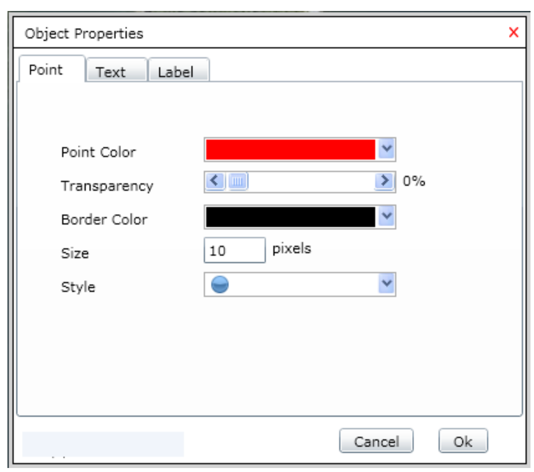
6-2: Modify Existing Map Feature

What to do:	How to do it:
Edit a Location Information	a. Right-click the ***Location*** in the Details box to reach the shortcut window b. Click ***Edit Location*** to display the Location Information screen c. Edit the information(Name, Description, GeoRegions, Map Reference) d. Click ***Save and Close***
Edit a Location Object	a. Select the object on the map b. Right-click the object to reach the shortcut window c. Click ***Edit Object*** to display object vertices • **Move Vertex**: Click on a vertex and ***drag it to the correct location*** or ***enter coordinates*** • **Insert Vertex:** Click on an vertex near the desired location of a new one and click ***Insert*** on the Drawing Editor • **Remove Vertex:** Select a vertex and click ***Remove*** on the Drawing Editor d. Click ***OK*** when finished editing
Delete a Map Feature Object	a. From the Map Details box, right-click the Location Name to access the Feature Menu b. Click **Remove Object**
Delete a Project Location	a. From the Map Details box, right-click the Location Name to access the Feature Menu b. Click Edit Location c. From the Feature Information window, click the Delete button

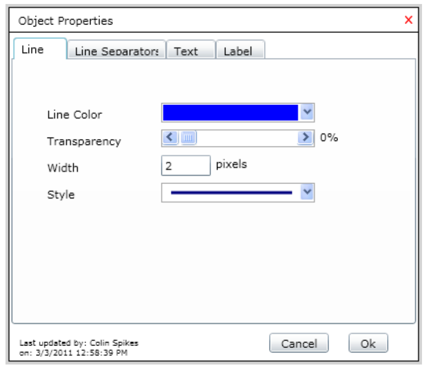


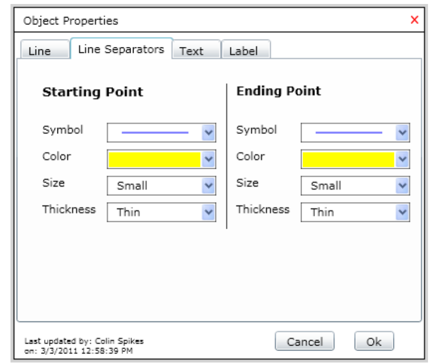
6-3: Feature Display Properties

Feature settings can be configured to display locations in different ways and create thematic maps.

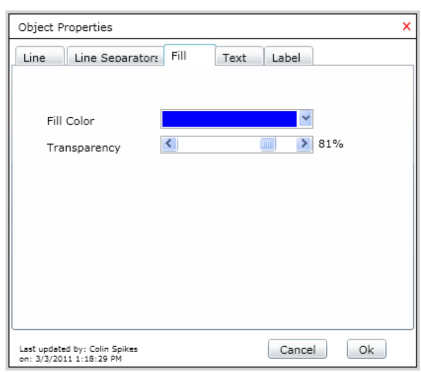
What to do:	How to do it:
Edit Feature Menu	a. Right-click the Location in the ***Details*** box to reach the shortcut window b. Click ***Properties*** 
Edit Point Feature Properties	Point features can be edited to display different point color, transparency, size, and style. a. From the ***Object Properties*** window ***Point*** tab, click on any of the drop-down menus to set the Object properties b. Click ***OK*** to apply settings 

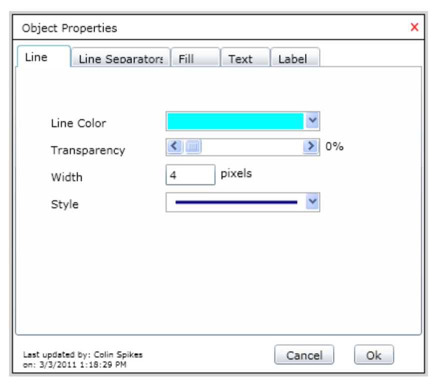
What to do:	**How to do it:**
Edit Line Feature Properties	a. From the Object Properties window Line tab, click on any of the drop-down menus to set the properties b. From the ***Line Separators*** tab, click on any of the drop-down menus to change the separator c. Click ***OK*** to apply settings





Edit Polygon Features Properties	a. From the Object Properties window; click the Line tab b. Click on any of the drop-down menus to set the polygon border properties c. From the ***Line Separators*** tab, click on any of the drop-down menus to change the separator d. From the ***Fill*** tab, click on the options to change the fill settings e. Click ***OK*** to apply settings





6-4: Feature Labels

Map features can be labeled to provide easier identification. Labels can be modified in a number of ways, as described in the following sections.

What to do: | **How to do it:**

Show Feature Label

a. Right-click the Location in the ***Details*** box to reach the shortcut window

b. Click ***Show Label***

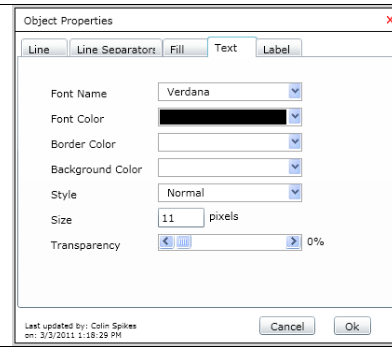
Edit Label Text Style

a. Right-click the Location in the ***Details*** box to reach the shortcut window

b. Click ***Properties***

c. Click on the Text Tab

d. Select any of the options from this page.



Edit Label Location

a. Right-click the Location in the ***Details*** box to reach the shortcut window

b. Click ***Show Label***

c. Right-click on the Label on the Map to display the shortcut menu

d. Click ***Edit Label***

e. Click on the label, hold down, and move it to the desired location.

f. Click ***OK*** when finished

Rotate Label

a. Right-click the Location in the ***Details*** box to reach the shortcut window

b. Click ***Show Label***

c. Right-click on the Label on the Map to display the shortcut menu

d. Click ***Edit Label***

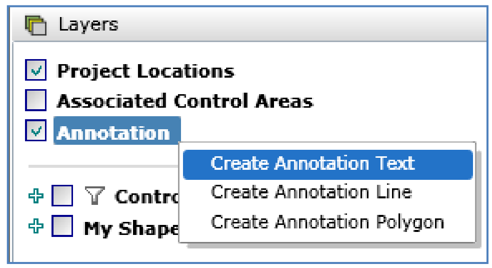
e. Click Rotate on the Drawing Editor window

f. Rotate the label

g. Click ***OK*** when finished

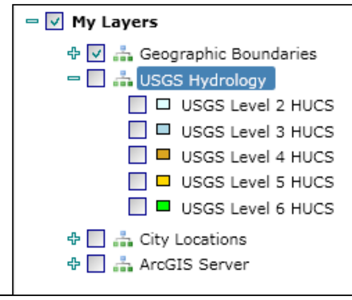
6-5: Map Annotation

Map annotation can be added to label features or create call-out pointers.

What to do:	How to do it:
Create Annotation Text	a. Right-click ***Annotation*** to reach the short cut menu b. Click ***Create Annotation Text*** • Click on the Map • Enter the ***Text*** into the textbox • Click ***Done*** 
Create Annotation Line	a. Right-click ***Annotation*** to reach the short cut menu b. Click ***Create Annotation Line*** • Click the Starting Point on the Map • Drag to End location • ***Right-click*** to accept changes or click ***Done*** 
Create Annotation Polygon	a. Right-click ***Annotation*** to reach the short cut menu b. Click Create ***Annotation Polygon*** • Click the Starting Point on the Map • ***Right-click*** or click ***Done*** when shape is created

6-6: Add External Layers to Map

GIS layers can be brought into the Project Map from ArcGIS Server services or from shapefiles you load in. These features can be copied to create a project location from an existing feature.

What to do:	How to do it:	
Add Layers to Map from Service	a. Click the **+** to expand the ***My Layers*** section in the layers menu b. Click the checkbox next to the layer to display it on the map	

Add Shapefile

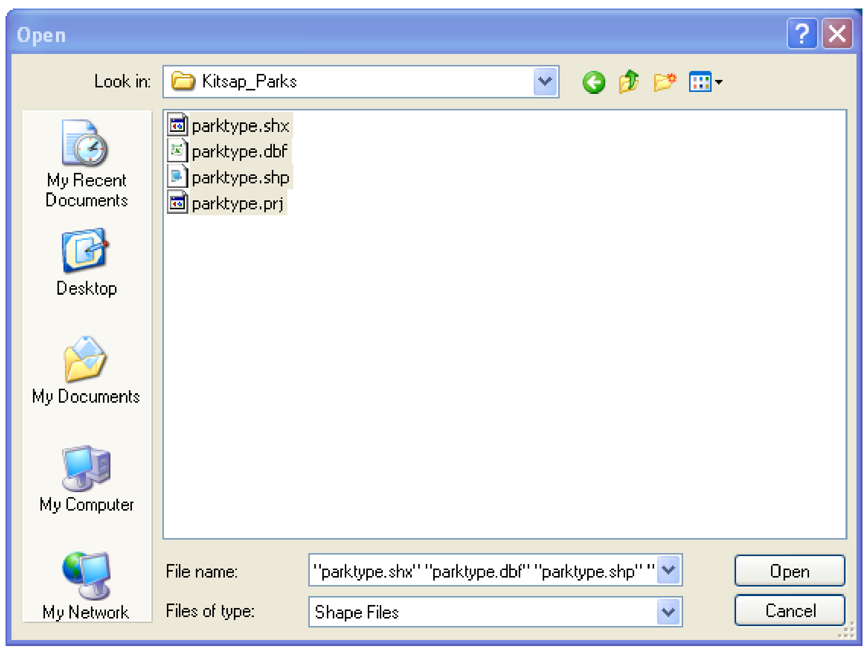
a. Right-click on ***My Layers***

b. Click ***Load***

c. Using the file browser, locate the shapefile (consists of files with extensions.shx, .dbf, .shp, & .prj)

d. Select the four files that EKO-System uses from the shapefile

e. Presss ***Open***



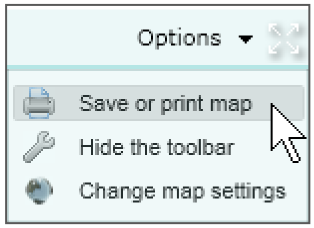
6-7: Save Map to Project Face page

What to do:	How to do it:

Display Project Map

a. From the project map, click the ***Options*** drop down menu

b. Select ***Save or Print Map***

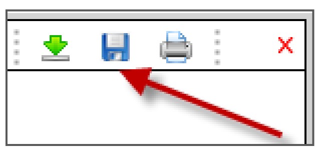


c. To have an image only on the Project Face page, check ***the Image Only*** box, or enter a ***Map Title***

- If image only, ***set the image size*** in pixels

d. Press ***OK***

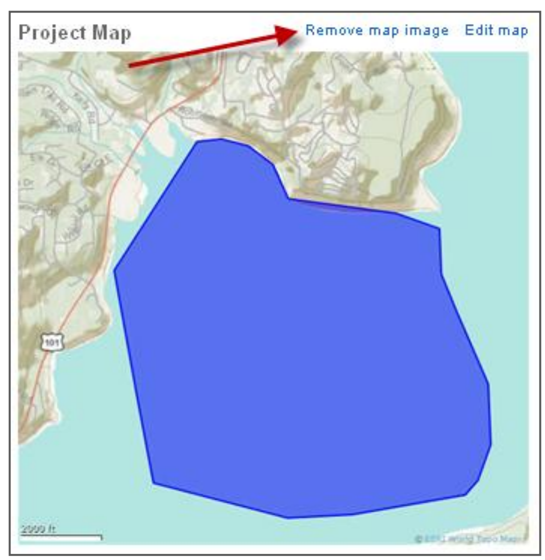
e. From the Print Preview screen, click the ***Save Icon*** on the toolbar



Change/Remove Project Map

To replace the map image click the ***Edit*** button update the map then follow the steps above. The new map will replace the old one.

To remove the map image click the ***Remove*** hyperlink above the map image on the project view page.



6-8: Attach/Detach Control Area to Project

Control Areas allow users to associate project with geographic features to aid with reporting. Control Areas are flexible features created by users.

What to do:	How to do it:
Attach Project to Control Area	a. Open the Project Map b. Click the ***+*** to expand the ***Control Areas*** section c. Select the appropriate ***Control Area Layer*** d. Select the ***Control Area Name*** in the Details window or select the ***Control Area Location*** on the map e. ***Right-click*** to reach the short cut menu f. Click ***Attach to Project***
Detach Project from Control Area	a. Open the Project Map b. Click on the Associated Control Areas checkbox c. Select the ***Control Area Name*** in the Details window or select the ***Control Area Location*** on the map d. ***Right-click*** to reach the short cut menu e. Click ***Remove from Project***

SECTION 7: MULTI-LEVEL HIERARCHY

Create Multi-Level Project

Reassign Project in Hierarchy

The Multi-level hierarchy feature helps organizations communicate how on-the-ground actions relate and roll-up to larger initiatives. By using 'Goals and Objectives" that are automatically quantified using 'Reporting Codes" implementation reporting from Level 3 projects can be summarized in higher level projects.

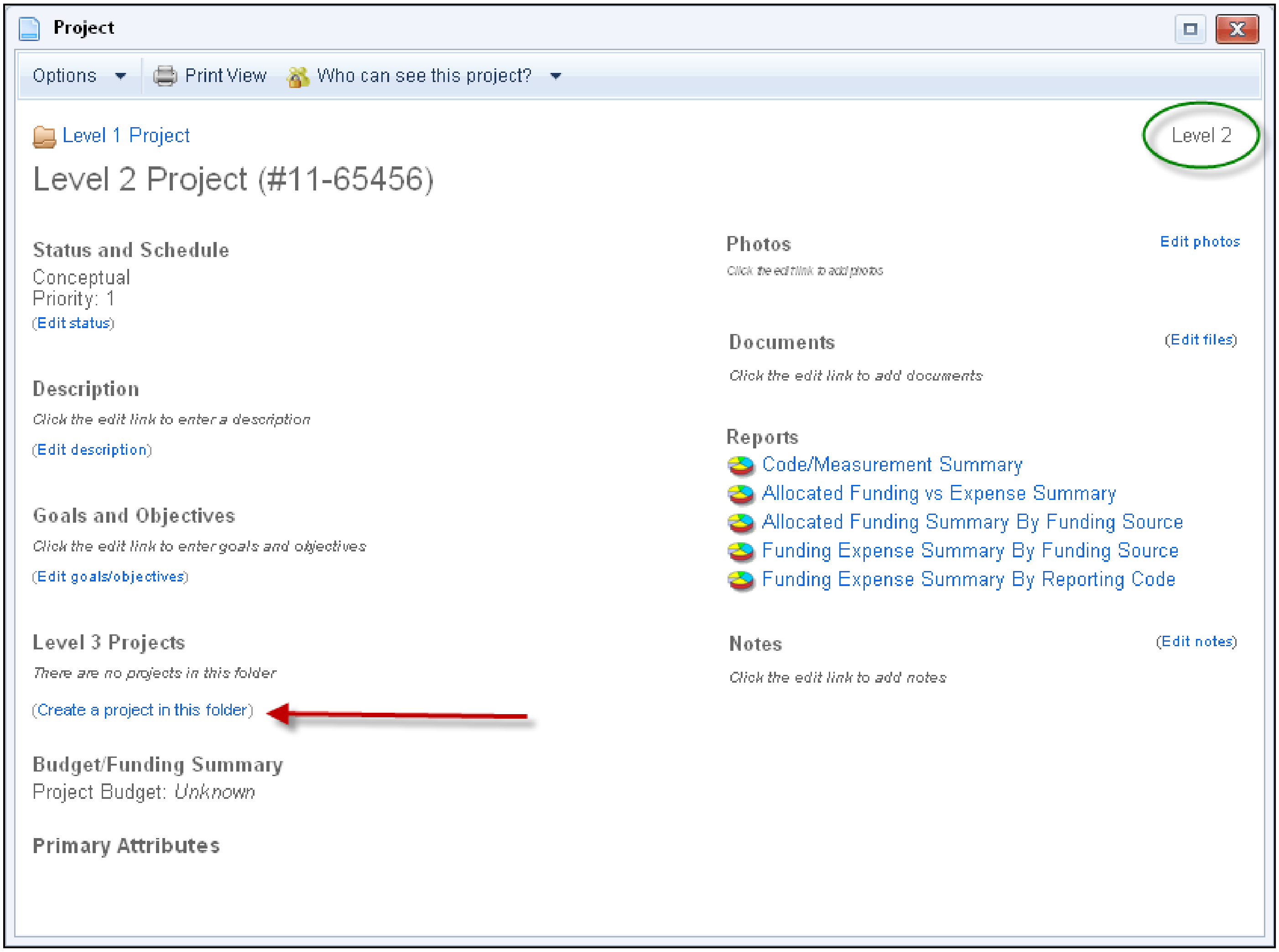
This section consists of the following exercises:

- Creating a multi-level project
- Attach/Detach existing project to Multi-level hierarchy

[7-1: Create Multi-level Project]

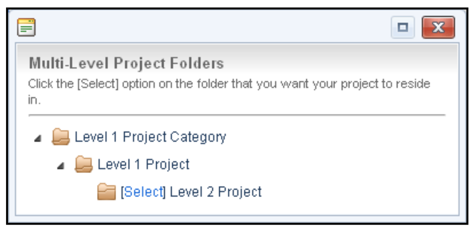
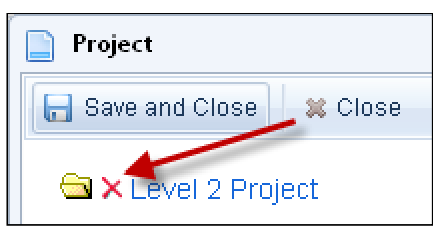
7-2: Create a Multi-level Project - Project Face Page

Once the Level 1 and 2 projects are created Lower level projects can be created right from the Project face page. Click the **Create a Project in this folder** link and follow the steps of the Wizard.



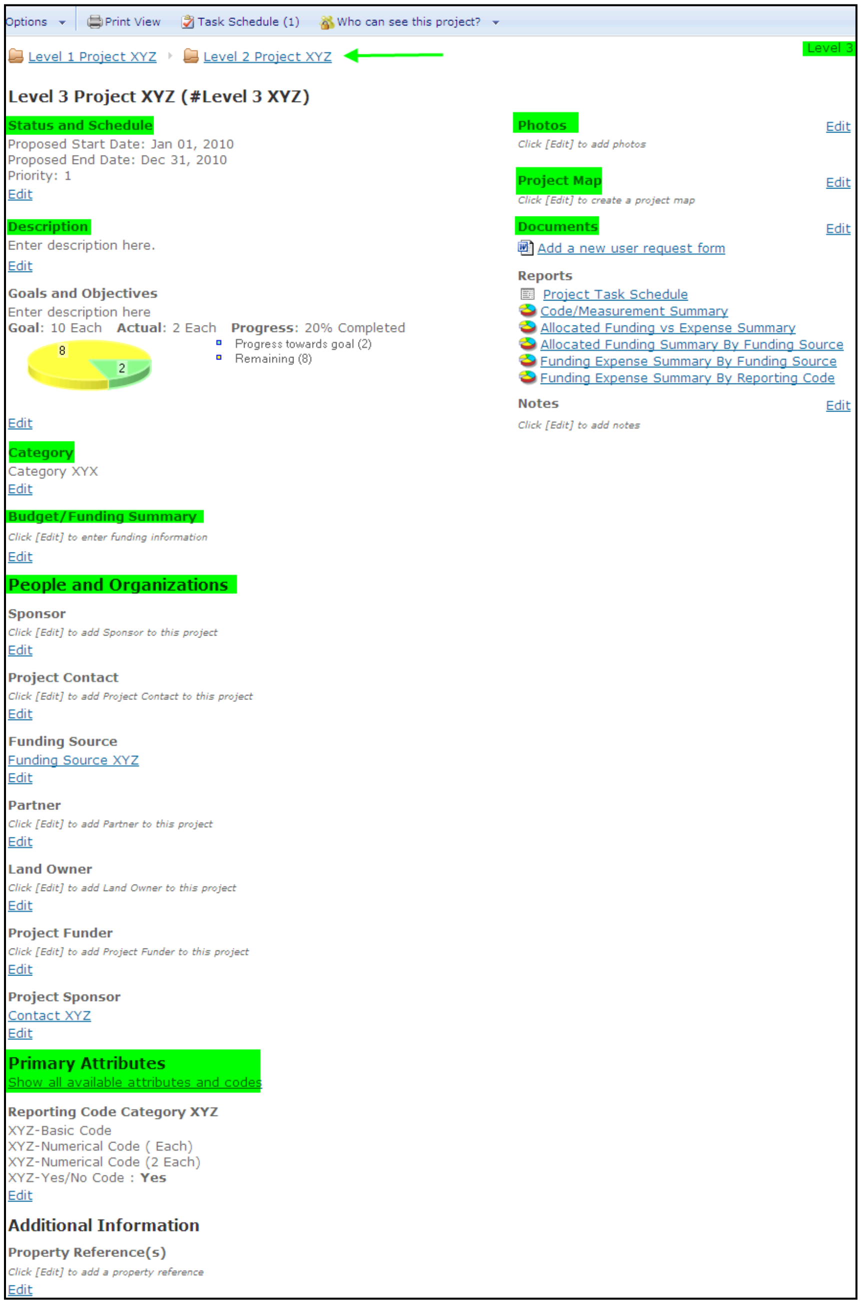
7-3: Editing Multi-level Hierarchy

Once a standard project has been created it can be attached to a Level 2 which converts the standard project to a Level 3 project and places it in the hierarchy.

What to do:	How to do it:
Attach Standard Project to Multi-level Hierarchy	a. Open the ***Project*** b. Click ***Options*** c. Click ***Edit Project Attributes*** d. Click the ***No Project Folder Selected*** link e. Expand the Project Category folder list f. Select a ***Level 2*** project g. Click ***Save and Close*** 
Detach Level 3 Project from Multi-level Hierarchy	Once a standard project has been attached to a Level 2 it becomes a Level 3 project. To remove that level 3 project from the Multi-level hierarchy folder; the level 3 project needs to be converted back to a standard project. a. Open the ***Project*** b. Click ***Options*** c. Click ***Edit Project Attributes*** d. Click the ***Remove Project from this*** link 

7-4: View Project Information

Once all information has been entered on the project attributes page, click *Save and Close*. *EKO-System* defaults to the Project View Screen with a project security level of Region/Guest. From this screen, users can view all attributes of the Project. The fields highlighted on the Project Face page are the same as the fields Options >Edit Attributes



SECTION 8: SEARCH FOR AND VIEW PROJECTS

Simple Project Search

Advanced Project Search

View Projects

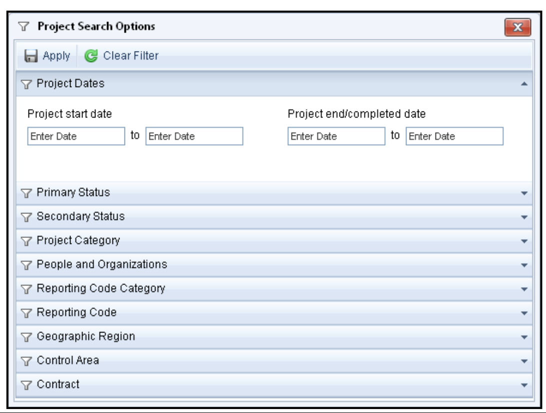
EKO-System allows users to search and view projects using different criteria to help users identify specific projects. Similarly, users can view projects in multiple contexts to assist with project

This section consists of the following exercises:

- Simple and Advanced Search
- View Projects in Different Contexts

8-1: Search Projects

Searching for projects or project information does not require exact information. Searches can be conducted with only partial information and can be facilitated using the search filter.

What to do:	How to do it:
Simple Search	Simple searches can be completed to search for projects, contracts, and files by name or part of the name. a. Click on the ***Search box*** in the upper right hand corner b. Enter the ***Name*** or part of the Name c. Click on the ***magnifying glass*** or press enter 
Advanced Search	Advanced searches can be completed to filter projects, contracts by attributes that are used. a. ***Select the information type*** you want to search for (Projects, Contracts, or Files) b. Click the ***Advanced Search*** link c. ***Filter the search*** by criteria d. Click ***Apply*** 

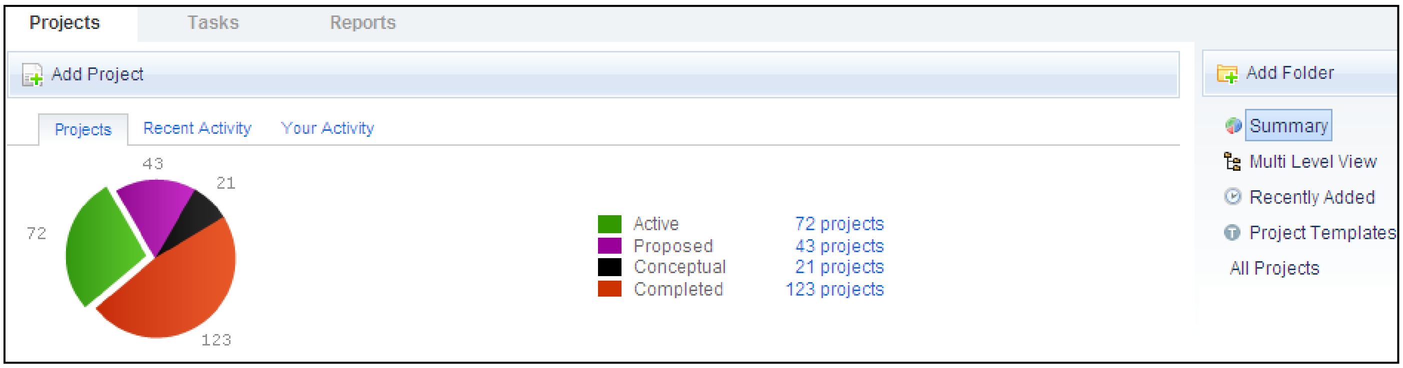
8-2: Project Information Views

Summary View

Project Manager defaults to a display that shows *all* projects in the **'Project Summary by Category'** view; however this view can be manipulated in many different ways.

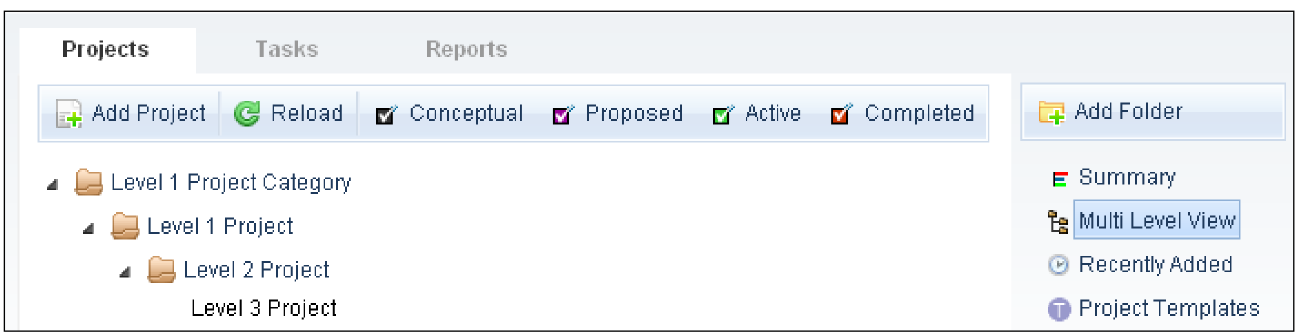
The view can be changed to display only a particular status (e.g. *Active Projects)* in the Category by selecting that status from the drop down menu.

The **Project Status Summary** window keeps a count of how many projects are in each status regardless of Category. Click the Status to see a list of the projects that meet the criteria. Once the list is displayed it can be sorted by clicking the header.



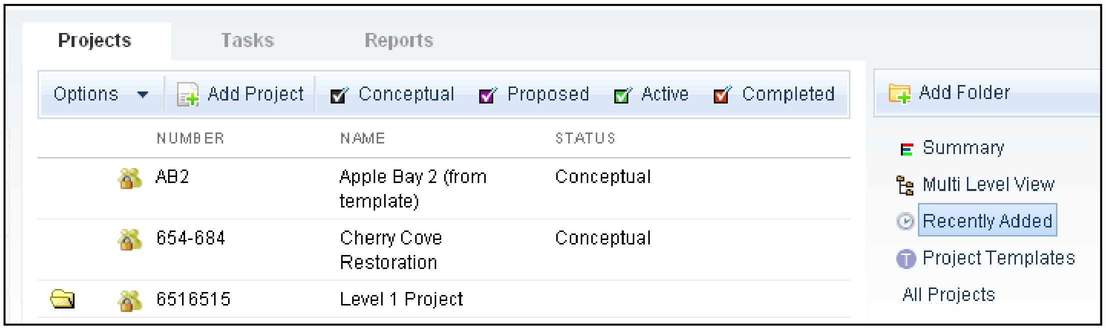
Multi-Level View

Another option for viewing projects is the Multi-level view. The projects are established in a hierarchy broken out by category. Click the folder to display Level 1, 2, and 3 projects. The **Toolbar** allows the user to view projects by status and add projects.



Recently Added View

The Recently Added projects view allows users to see the projects that were recently added to the system.



Project List View

The Project List View displays all Level 3 or standard projects. Click the Headers to sort by, Project ID, Project Name or Project Category.

All Projects View

The All Projects View lists all the Level 1-3 Projects in the datasite.

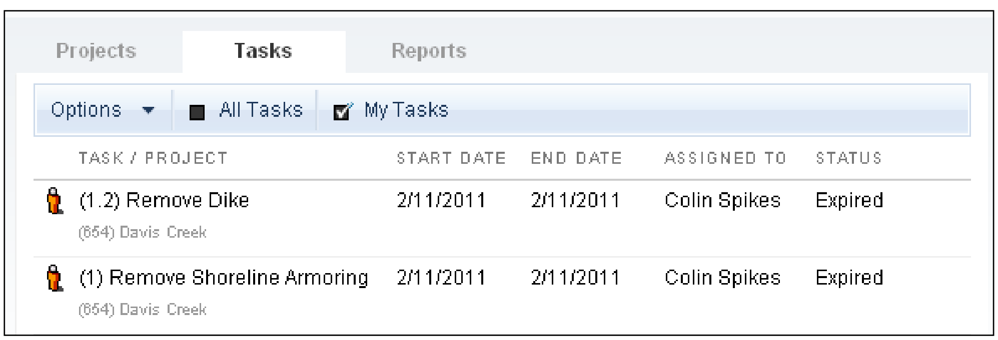
Task List View

Projects can also be viewed via the task list.

NOTE: <u>Only ***Active*** projects with tasks assigned are listed in this view. Two views are available:</u>

All Tasks - All assigned tasks display

My Tasks - Only tasks assigned to the user who is logged in display



NOTE: <u>The list can be sorted by clicking the header names with the exception of status.</u>

SECTION 9: PROJECT REPORTS

Create Project Report
Save and Share Reports
Create Custom Reports
Customize Report Layouts

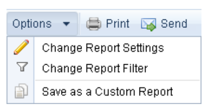
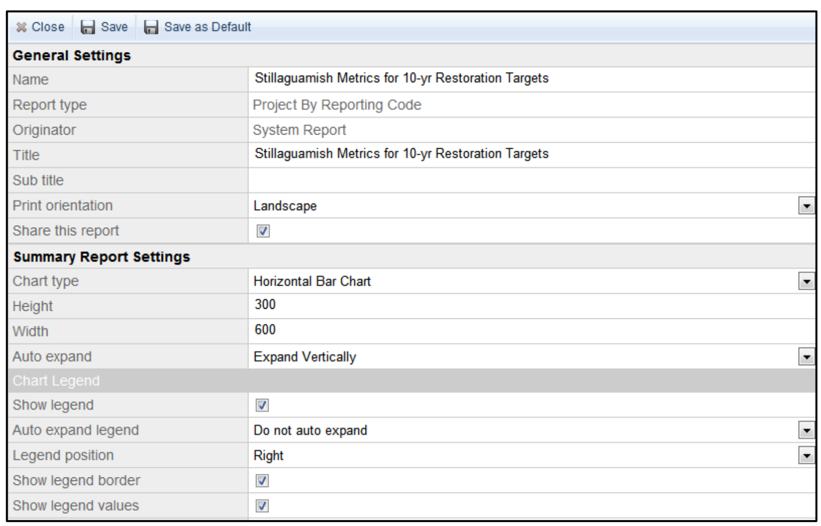
After an EKO-System datasite has been populated with project data, reports can be generated based on this information. Every EKO-System implementation comes with a number of pre-configured project reports, which can be customized to generate reports on specific project attributes or appear in a specific format.

This section consists of the following activities:

- Create a report using the Quick Report Wizard
- Modify the appearance of a report
- Use pre-configured reports
- Create a custom report from an existing report
- Save and share your custom reports

9-1: Project Report

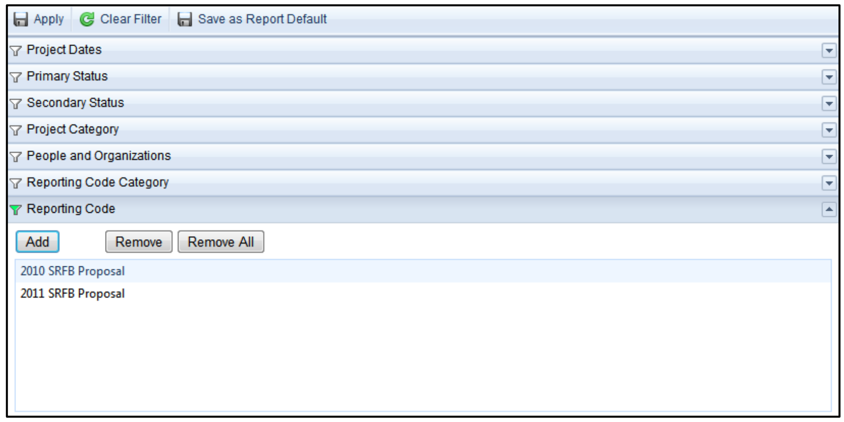
Reports are accessed via the ***Projects*** module and only users with the Data Access Right-Run Reports have the ability to use this tool.

What to do:	**How to do it:**
Create a Report	a. Enter the **Projects** module b. Click the **Reports** Tab c. Click the appropriate report
Change Report Settings	a. Click the ***Options*** drop-down menu  b. Select ***Change Report Settings***  • Modify the applicable settings. c. Press ***Apply***

Change Report Filter

a. Click the ***Options*** drop-down menu

b. Select ***Change Report Filter***



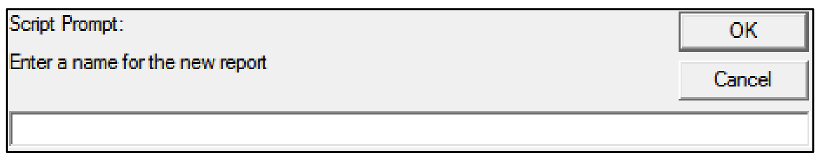
c. Add applicable ***filter(s)***

d. Click ***Apply***

Save as Custom Report

a. Click the ***Options*** drop-down menu

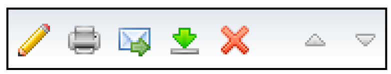
b. Select ***Save as Custom Report***



c. Click ***OK***

9-2: Custom Reports

Custom reports are created by making changes to existing reports.

What to do:	How to do it:
Add Report to Summary View	a. Click Add to Summary View to save a Custom Report to your Summary view page 
Remove Report from Summary Page	a. From the summary view page, click the red ***Remove*** icon(**x**) 
Delete a Custom Report	a. Enter the ***Project Manager*** module b. Click ***Reports*** c. Click the red ***Remove*** icon (**x**) to delete the report d. Click ***OK*** 

What to do:	How to do it:
9-3: Change List Settings	a. Click on a Project List b. Click on the Options drop-down menu c. Select Change List Settings d. Change List Settings e. Press Save f. List will refresh with your settings applied
	a. **Print Version** • Print a copy of the chart b. **Download** • Create an Excel copy of the report information c. **Send** • Email a report
9-4: Change List Filter	a. Click on a Project List b. Click on the Options drop-down menu c. Select Change List Filter d. Change List Filter e. Press Save List will refresh with your filter applied
	a. **Print Version** • Print a copy of the chart b. **Download** • Create an Excel copy of the report information

SECTION 10: MAP MODULE

Browser Setting

Points of Interest Layers

Project Layers

Control Area Layers

Shape Files

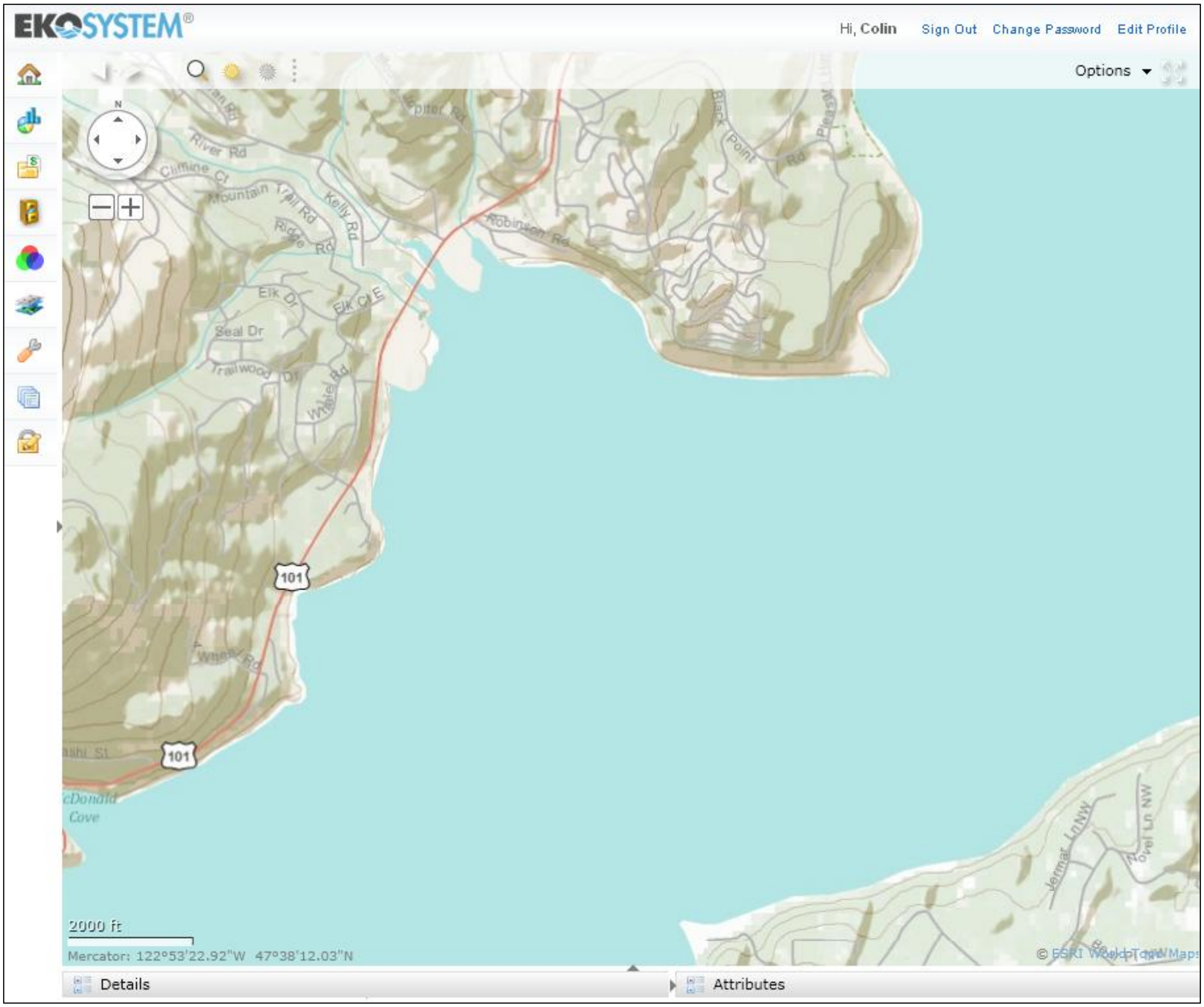
This section will discuss the following:

- Adjusting the settings of the map on the user's computer
- Manipulating layers and various options for viewing data on the map
- Uploading Shapefiles
- Saving Personal Maps

10-1: Change Map Settings

The Map is a dynamic tool. Projects, Control Areas, and custom GIS Layers can be displayed in here to view information in its spatial context. Layers can be turned on and off and manipulated to suit communication and decision making.

The Map settings can be adjusted to provide a map that is most conducive to viewing the data displayed.



What to do:	How to do it:

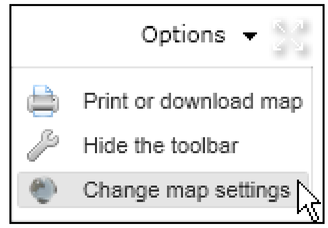
Adjust Map Settings

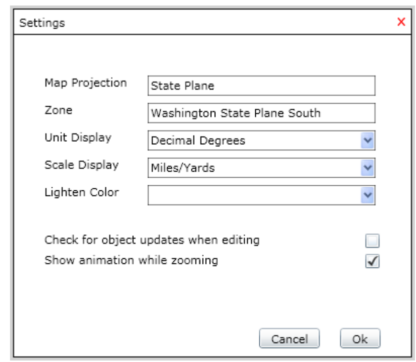
a. Click the **Options** menu in the upper right hand corner of the map

b. Select **Change Map Settings** from the drop-down menu

c. **Adjust Map Settings** listed below as needed

d. Press the **OK** button to save





Map Projection

- Projections system used by map

Zone

- State Plane System Zone

Unit Display

- Decimal Degrees
- Degrees Minutes
- Degrees Minutes Seconds
- Meters
- Feet

Scale Display

- Kilometers/Meters
- Miles/Yards

Lighten Color

- Select a color
- Map fades to the selected color
- Easier to view objects

Check for object updates when editing

- System displays last update to mapped object

Show animation while zooming

- Select/Deselect to turn zoom animation on/off

10-2: Map Layers

The Map module integrates features and base maps. Map layers allow the user to display features and base maps in customized views. Feature datasets can be displayed as points, lines, or polygons. The Map module interacts with other modules allowing user to filter and display data using attributes from Projects, Contracts, and Control Areas. Users may display feature data from external sources including shapefiles, ArcGIS Server, and other Geographic Consortium Standards (GCS) data sources.

This section will give examples to help understand the options that available.

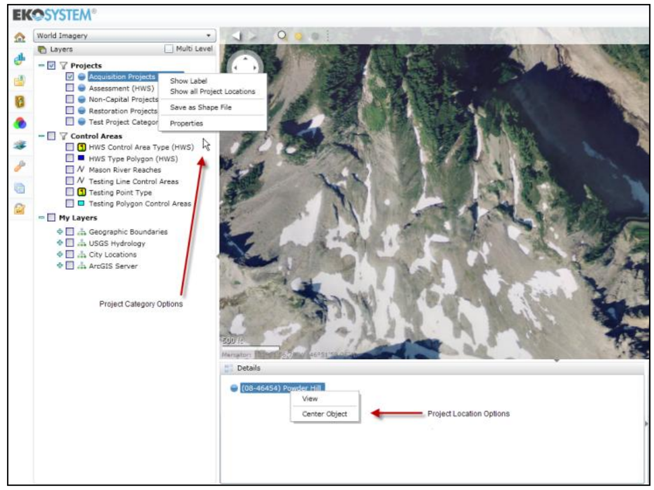


Figure 20 - Map Layers-Standard View

What to do:	How to do it:

Map Feature Options	a. Click the check box in front of the word ***Projects*** to display all projects in all categories as points on the map **or**
	• Click ***+*** to expand the ***Project*** categories
	• Check to display projects by category
	• ***Points*** will display on the map
	• Details will populate in the Details window below the map
	    • Right click Project name in Details box to:
	        • View Project Facepage
	        • Center Project Location
	• Right-click the ***Category*** name in the left navigation to reach the shortcut menu
	    • Right click on the Category name to:
	        • Show Labels
	        • Show all Project Locations (points, lines, polygons) assigned to the category
	        • l

What to do: | **How to do it:**

Projects Layer - Multi-Level View

a. Click the ***Multi-Level*** checkbox above the left navigation pane

b. Click the **+** in front of ***Projects*** to expand the list

c. Click the **+** in front of the ***Level 1 Project Category Name***

d. Click the **+** in front of the applicable ***Level 1 Project Name***

e. Click the check box in front of the applicable ***Level 2 project***

f. The ***Level 3 projects*** display on the map and in the Details window

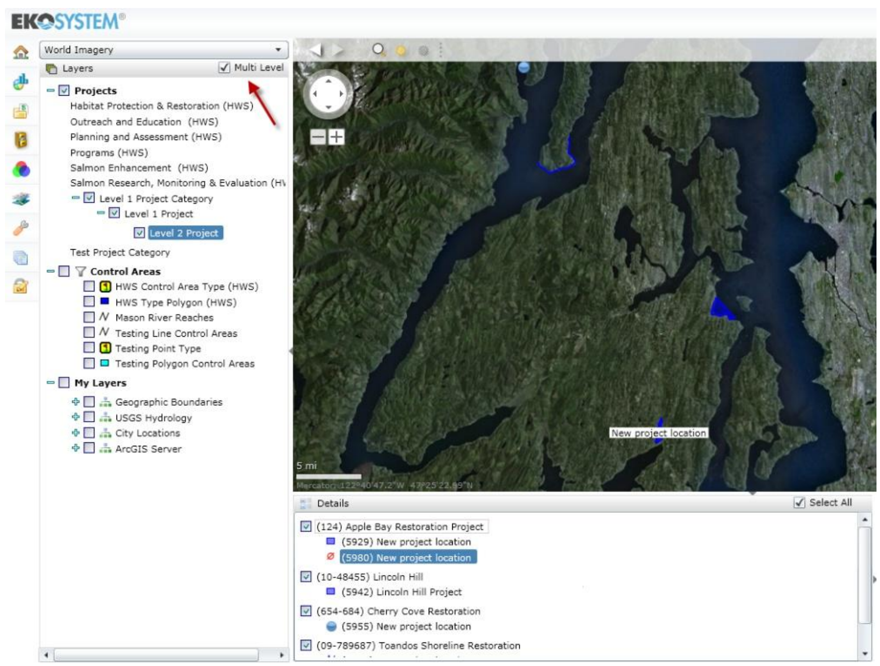
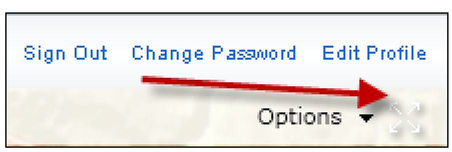


Figure 21 - Map Layers - Multi-Level View

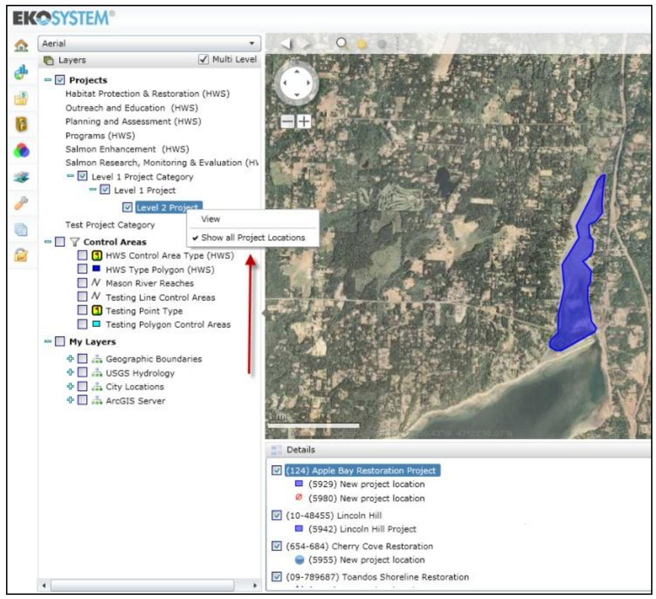
Full Screen View

Click the Full Screen link in the upper right corner to view a larger map



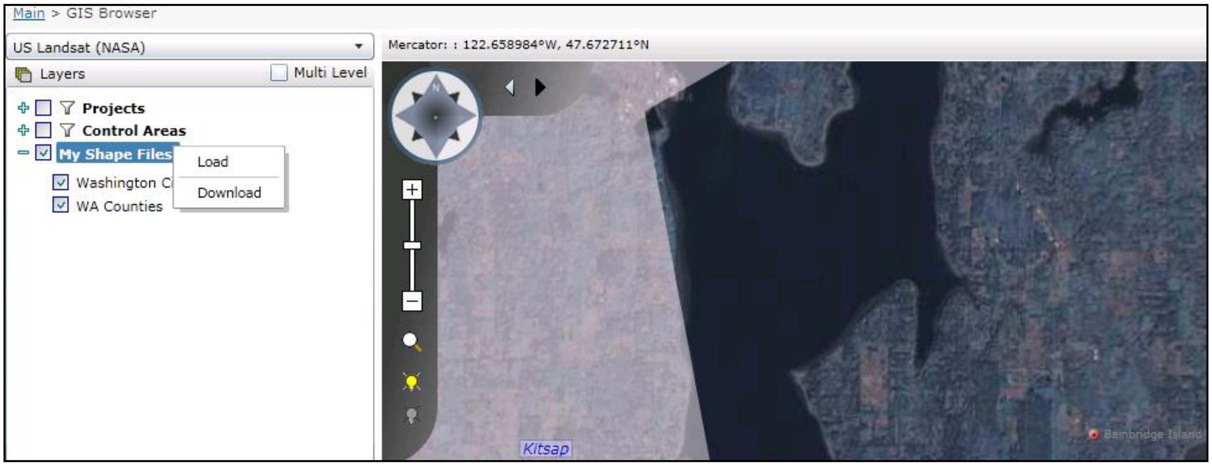
Full screen mode is view only; edits cannot be made while in full screen.
Press the ESC on your keyboard to leave full screen and enter edit mode

What to do:	How to do it:
Display Project Locations as Points, Lines, or Polygons	a. Click the check box in front of the word ***Projects*** to display projects in all categories as points on the map **or** b. Click ***+*** to expand and display categories c. Select which category to display d. Right-click the ***Category*** to reach the shortcut menu e. Select ***Show all Project Locations***



- When the location is selected on the map the corresponding detail line is auto selected
- ***Spatial Attributes*** and ***Object Data*** displays
- Right-click the highlighted project to reach the shortcut menu:
    - **Center Object -** centers the object on the map
    - **Show Label -** displays the label on the map

Users can display feature data on the map from shapefile or web services. The ESRI shapefile is a geospatial vector data format for GIS software. It is developed and regulated by ESRI as a (mostly) open specification for data interoperability among ESRI and other software products. Web services are published from ArcGIS Server and connected to display on the map



Shapefiles

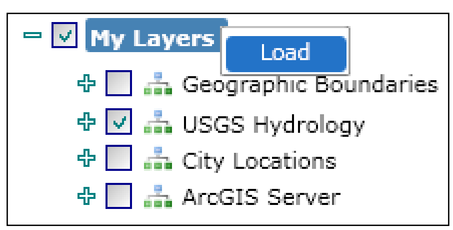
A 'shapefile' commonly refers to a collection of files with extensions ".shp", ".shx," ".dbf", and ".prj" on a common prefix filename (i.e., 'lakes.*'). The actual 'shape file' relates specifically to files with the '.shp' extension; however this file alone is incomplete for distribution, as it depends on the other supporting files. 'shapefiles' spatially describe points, polygons, and polylines. These, for example, could represent water wells, lakes and rivers, respectively. Each item may also have attributes that describe the items, such as the name or temperature.

What to do: / How to do it:

What to do: Load - upload shapefile stored on the user's computer.

How to do it:

a. Right-click My Layers



b. Select Load

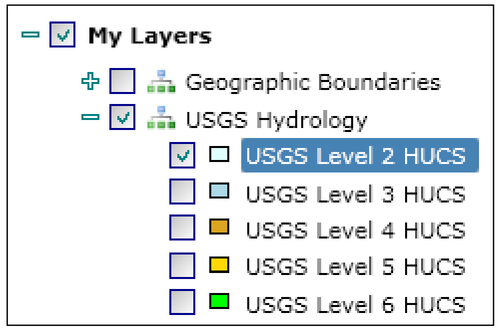
c. Read Tip; click OK

d. Select files from your computer (".shp", ".shx," ".dbf", and ".prj")

e. Press OK on the file browser

Web Service Features
Users can connect to pre-configured web services to display feature data on the Map.

What to do:	How to do it:
Display Web Service Features	a. Click My Layers b. Click the **+** in front of a group feature dataset c. Click the check box to display a feature dataset



SECTION 11: CONTROL AREAS

Control Area Categories

Control Area

Associate Project with Control Area

The Control Areas module allows users to associate projects with geographic features for reporting and display purposes.

This section will discuss the following topics:

- Creating a Control Area
- Storing Control Areas in Control Are Categories
- Associating a Project with a Control Area

11- 1 Control Area Categories

The Control Area Module allows the user to create and maintain Control Areas used in identifying and monitoring affected geographical areas. Control Areas are assigned to projects, used for project reports, and can be used as search criteria when looking for project information.

Organizing control areas is best done by creating categories.

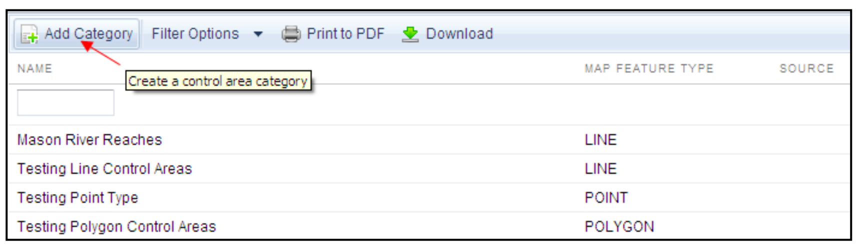
What to do: / How to do it:

Create a Control Area Category

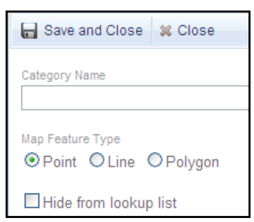
a. Click ***Configuration*** (role based)

b. Click the ***Folders/Categories*** link under Control Areas

c. Click ***Add Category***



d. Enter ***Category Name***



e. Select ***Map Feature Type*** (Point, Line, Polygon)

f. *Hide from lookup list* (if applicable)

g. **Save and Close**

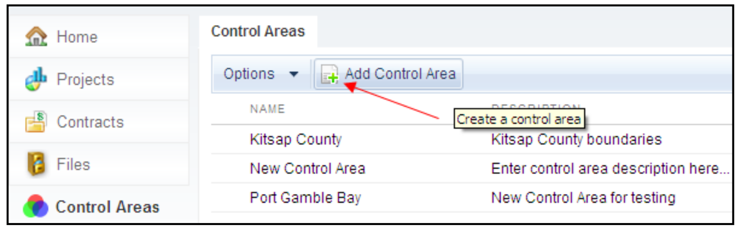
11- 2 Control Areas

What to do:	How to do it:

Create a New Control Area

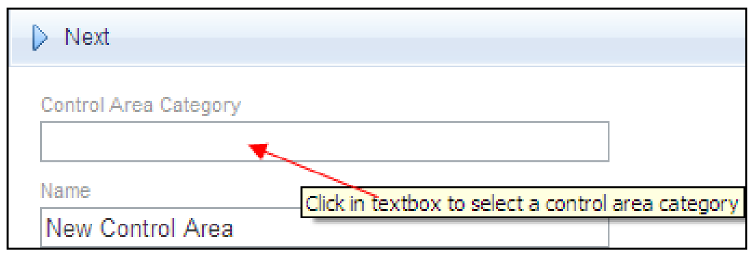
a. Launch the ***Control Areas*** module

b. Click the ***Add Control Area*** button



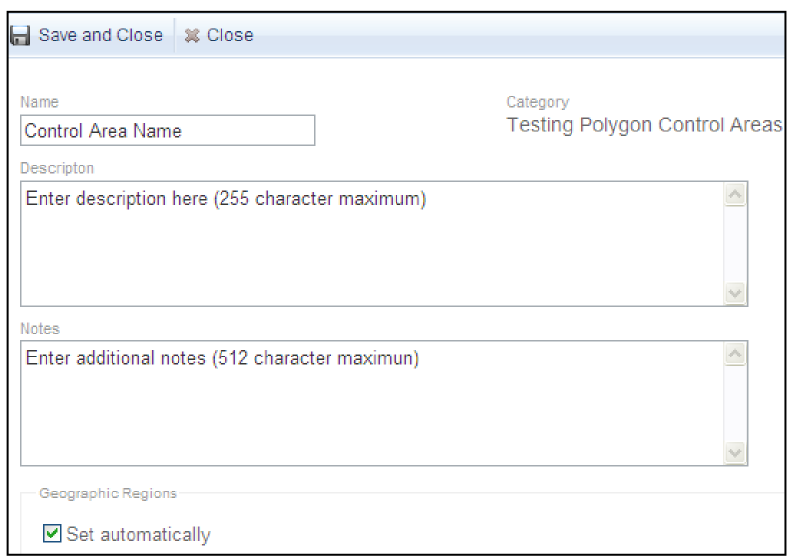
c. Click in the ***Control Area Category*** field to select from the list

d. Enter the ***Name*** of the new Control Area



e. Click ***Next***

f. Enter Description and notes (Optional)



g. **Save and Close**

11- 3 Edit/Delete a Control Area

If the Control Area is not been attached to a project it can be deleted from the system.

What to do:	How to do it:

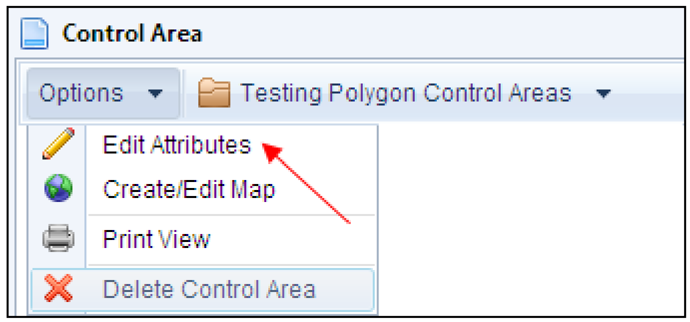
Edit a Control Area

a. Launch the ***Control Areas*** module

b. Select the ***Control Area***

c. Expand the ***Options*** drop down list

d. Click ***Edit Attributes*** to make changes



e. ***Save and Close***

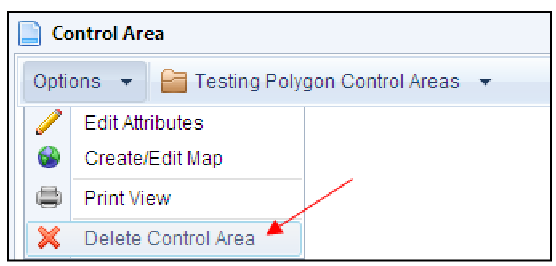
Delete a Control Area

a. Launch the ***Control Areas*** module

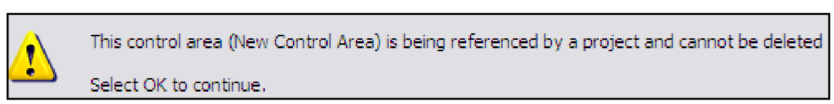
b. Select the ***Control Area***

c. Expand the ***Options*** drop down list

d. Click ***Delete Control Area***



NOTE: <u>An error will be received if Control Area is attached to a project</u>.



11- 4 Map a Control Area

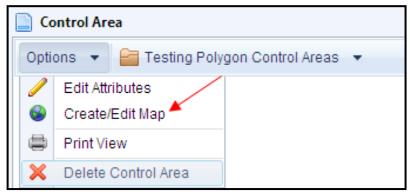
What to do:	How to do it:
Create Object	a. Launch the ***Control Areas*** module

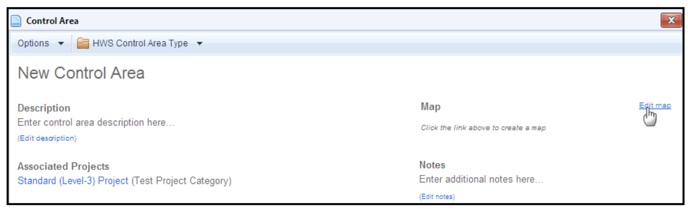
a. Launch the ***Control Areas*** module

b. Select the ***Control Area***

c. Expand the ***Options*** drop down list

d. Click ***Create/Edit Maps*** or click the ***Edit Map*** link





e. Right-click the ***Control Area Name*** in the details window

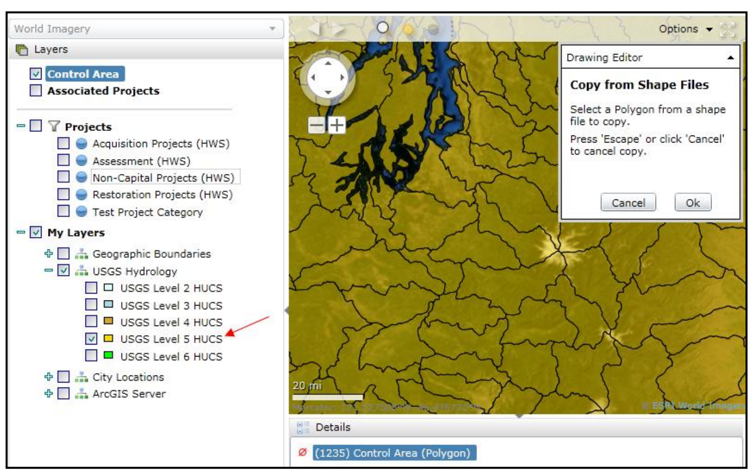
f. Click ***Create Object*** or ***Copy Feature*** (see NOTE)

g. ***Click on map*** to create a location or enter coordinates in drawing editor dialogue box

h. Right-click object on the map or click ***Ok*** in the dialogue box

i. Click ***Save and Close***

NOTE: <u>Load a layer to use the ***copy*** feature</u>



Attach Control Area to a project	a. Open the Control Area map b. Click the ***+*** to expand the ***Projects Layer*** c. Select the applicable Project Category Layer d. Select the ***Project Name*** in the Details window or select the ***Project*** on the map e. ***Right-click*** to reach the short cut menu f. Click ***Attach to Control Area***
Detach Project from Control Area	a. Open the Control Area Map b. Click on the Associated Control Areas checkbox c. Select the ***Control Area Name*** in the Details window or select the ***Control Area Location*** on the map d. ***Right-click*** to reach the short cut menu g. Click ***Remove from Project***

SECTION 12: CONTRACTS

Create Contract

Associate Contract with Project

Edit Contract Attributes

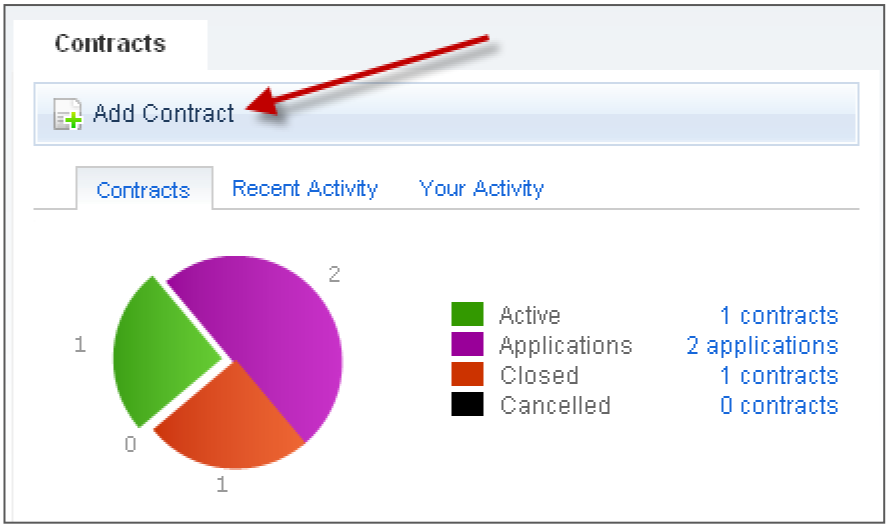
Submit Contract to PRISM

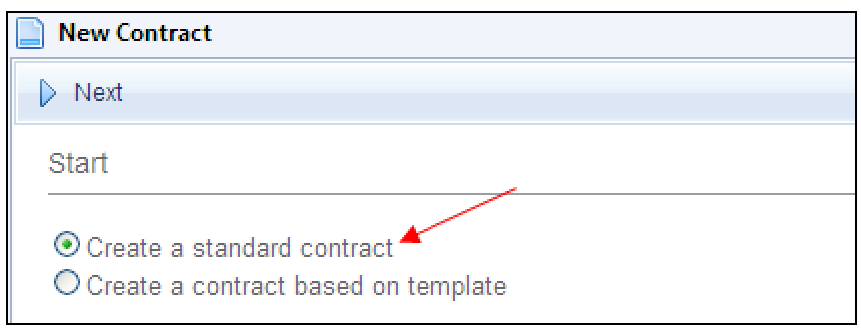
The Contracts module allows users to create contracts to track funding vehicle information against a project(s) or stand alone. Contracts can be grants, landowner agreements, or other types of contracts. Contracts can be submitted to Washington's Recreation and Conservation Office and other external databases. By using and Contract template, users can track standardized Contract Attributes. Only users with permission to the Contracts module will be able to access it. Users with permission will have a Contracts button in the left toolbar.

This section will cover the following topics:

- Creating a contract
- Associating a contract or contracts with a project or projects
- Completing and Editing Contract Attributes
- Sending Project attributes to associated contract
- Submitting contract to PRISM or other external databases

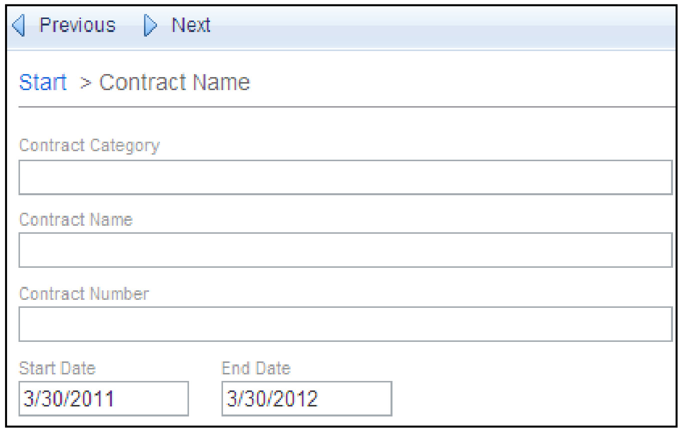
12-1: Create Contract



What to do:	How to do it:
Create a Standard Contract	From the main page, click the **Contracts** link; click the ***Add Contract*** button to start the wizard a. Step 1 - ***Start*** • ***Create a Standard Project*** (default) • ***Create a contract based on template*** to submit to PRISM or other external database, select PRISM template from list  • Click ***Next***

b. Step 2 - ***Contract Name***

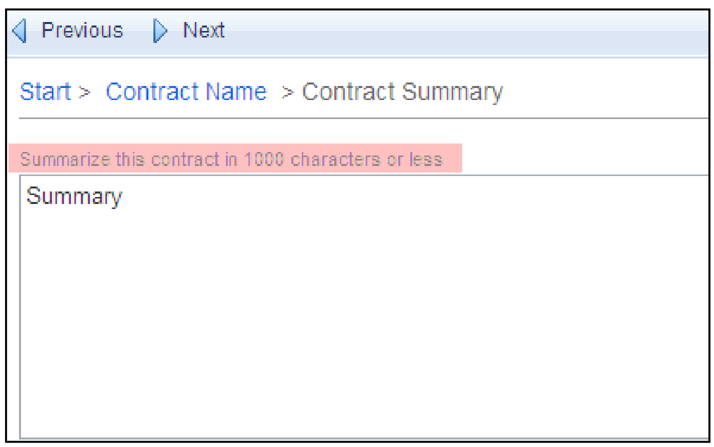
- Enter Contract Category (Optional)
- Enter ***Contract Name***
- Enter ***Contract Number***
- Update Start and End date (Defaults to current date)



- Click ***Next***

c. Step 3 - ***Summary***

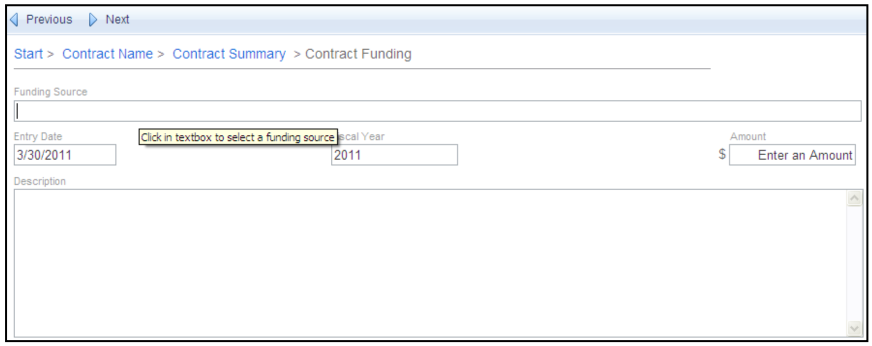
- Enter ***Summary***



- Click ***Next***

d. Step 4 - ***Contract Funding***

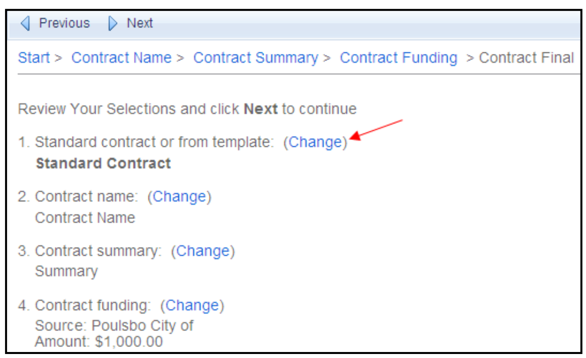
- Enter ***Funding Source*** or click in the field to search
- Update Entry date (Defaults to current date)
- Update Fiscal Year (Defaults to current year)
- Enter ***Amount***
- Enter Description (Optional)



- Click ***Next***

e. Step 5 - ***Contract Final (Review)***

- Click Change next to the applicable field to edit data



- Click ***Next*** to Save and Create Contract

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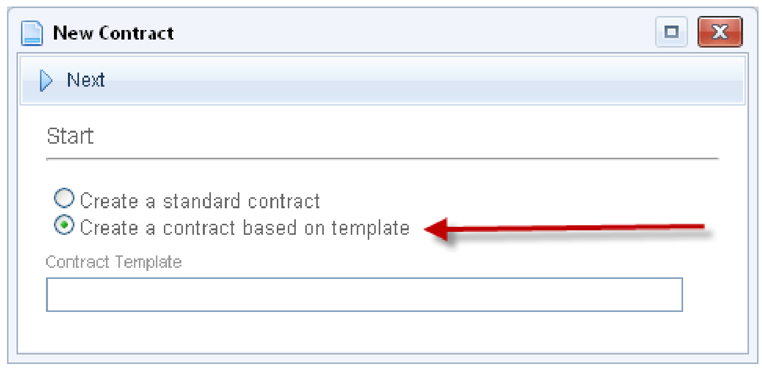
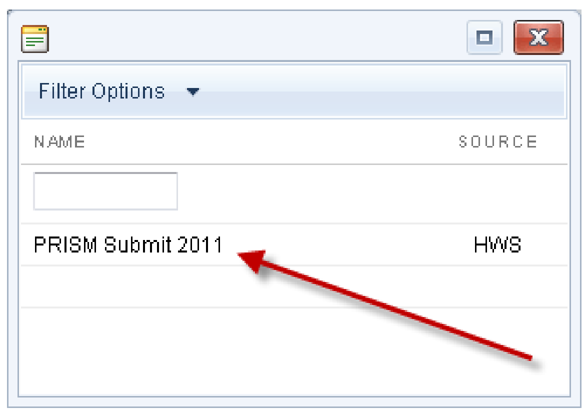
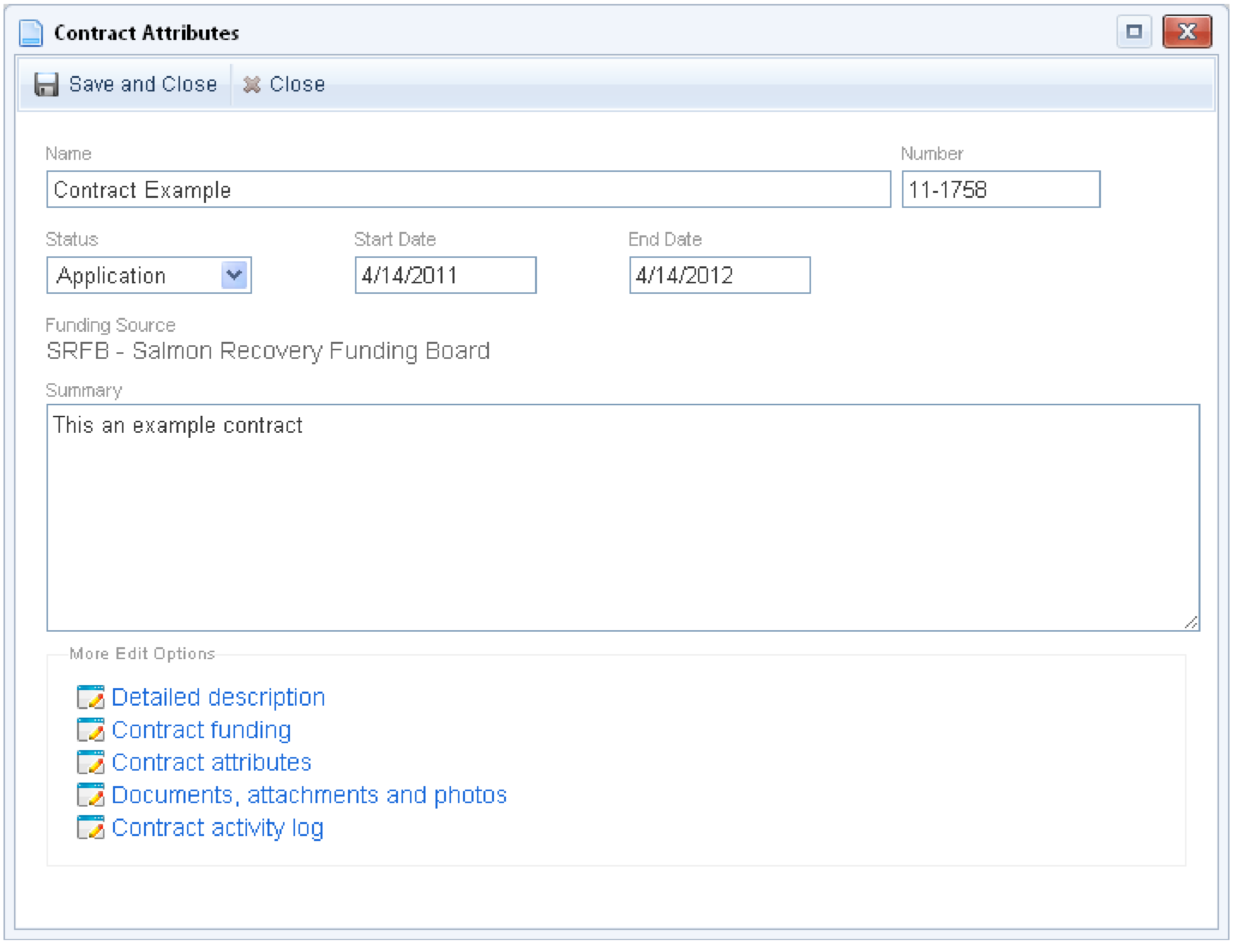
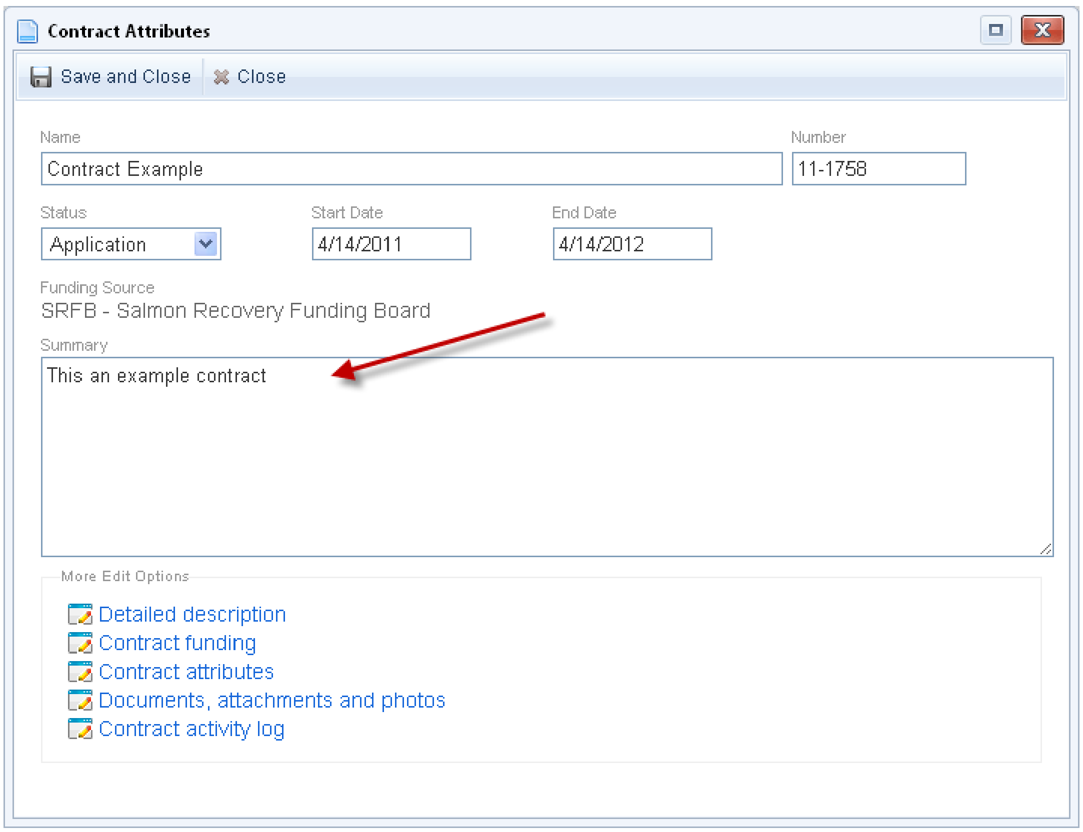
What to do:	How to do it:
Create a Contract to Submit to PRISM or other External Database	To submit a contract to PRISM or another external database, users must create a contract based on a template. The PRISM template will be in the available template list for HWS users. From the main page, click the **Contracts** link; click the ***Add Contract*** button to start the wizard a. Step 1 - ***Start*** • ***Create a contract based on template*** to submit to PRISM or other external database  • Select PRISM template from list  • Click ***Next***
	b. Step 2 – ***Follow remaining steps*** for a standard contract from previous section

12-2: Enter Contract Attributes

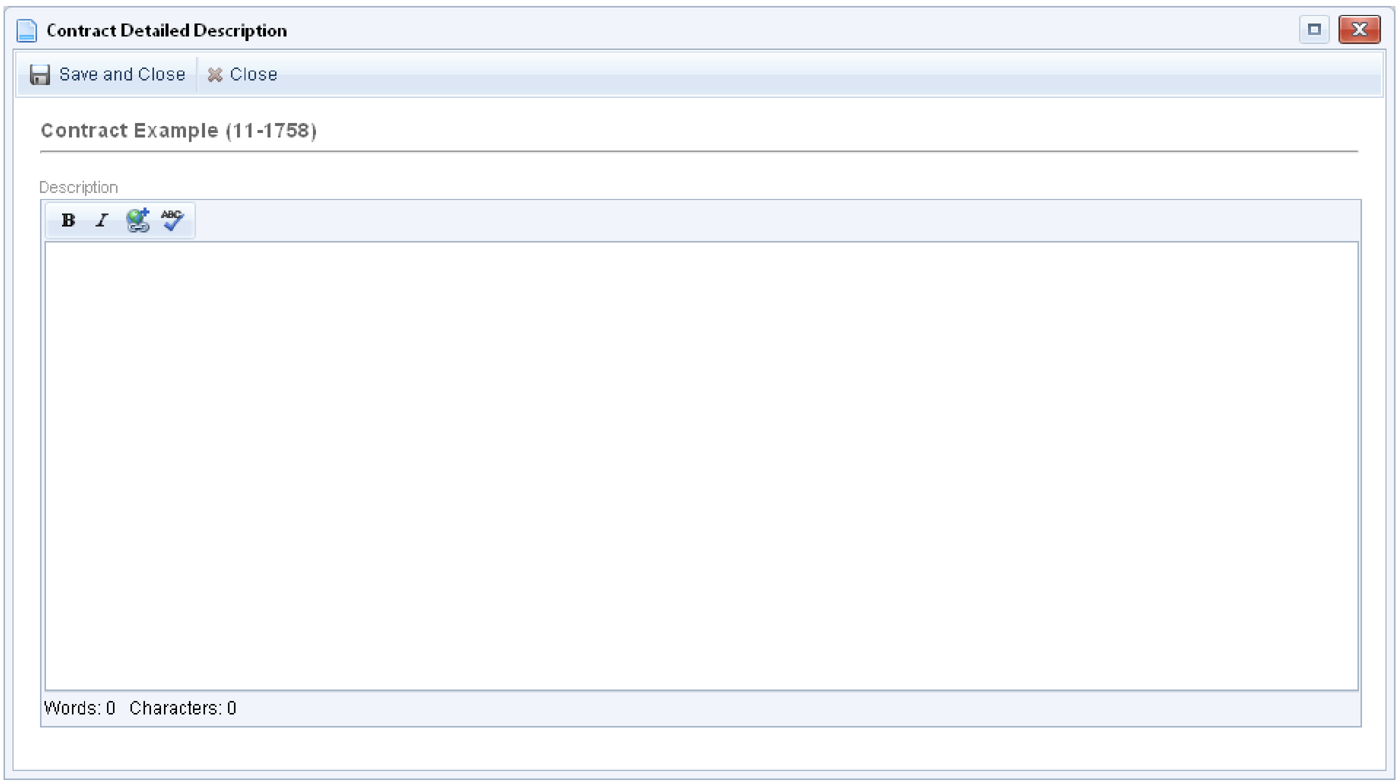
From the Contract Attributes screen pictured below, users can enter the contract specific information needed including a description, funding, and other attributes.



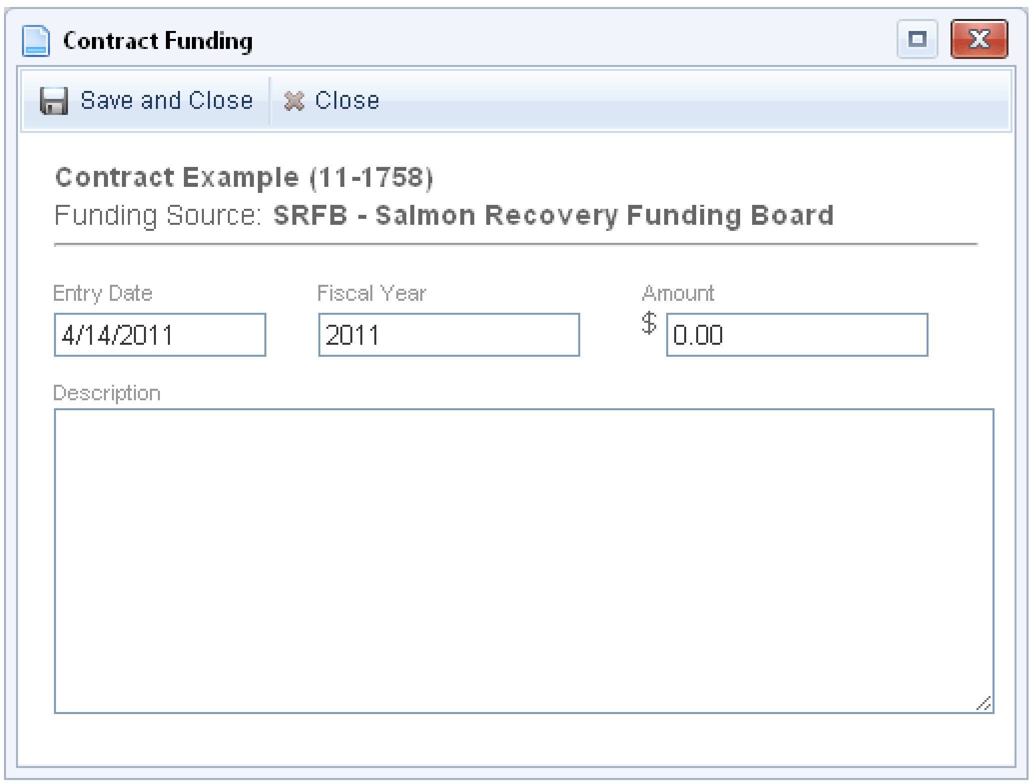
What to do:	How to do it:
Enter Contract Summary	The Contract summary is intended to be a brief description of your Contract and is limited to 1000 characters. Longer descriptions can be entered into the Detailed description, which allows 4000 characters. a. Place cursor in ***Summary*** field b. Append the summary that was entered when creating the contract c. ***Save and Close***



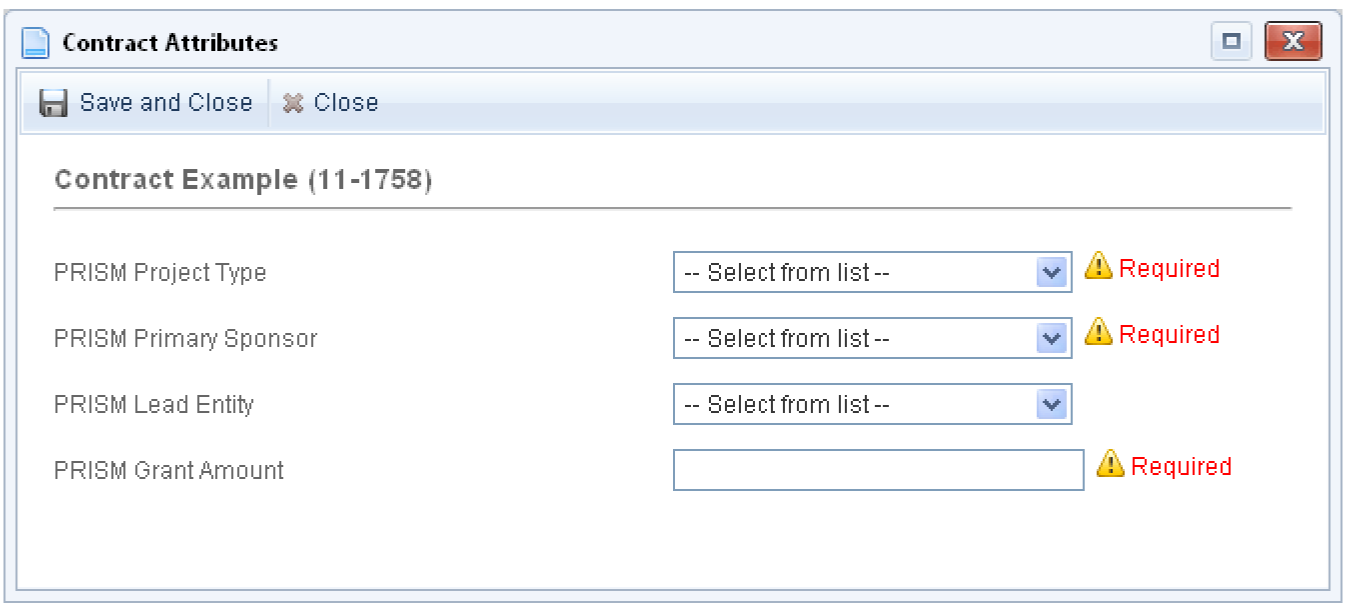
What to do:	How to do it:
Enter Contract Description	The Contract Detailed Description is designed to accommodate a more detailed description of your Contract than the Contract Summary. The field contains a 4000 character maximum. a. From the Contracts Attributes screen, click ***Detailed Description*** b. Enter a ***description*** c. Click ***Save and Close*** from the toolbar



What to do:	How to do it:
Add Contract Funding	When creating a contract, a funding source is identified by the user. To add funding to the Contract from the funding source, follow the steps below. a. From the Contracts Attributes screen, click ***Contract Funding*** b. Click ***Add Funding*** c. Enter an ***Entry Date*** d. Select the ***Fiscal Year*** e. Enter the ***Funding Amount*** f. Enter a *Funding Entry Description* g. Click ***Save and Close*** from the toolbar



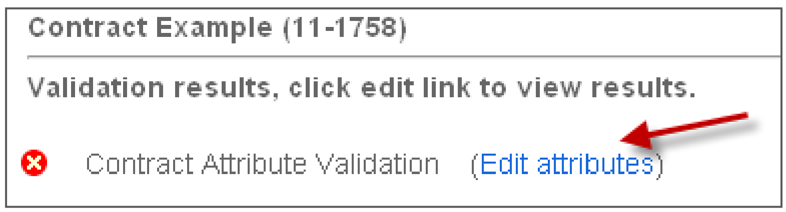
What to do:	How to do it:
Enter Contract Attributes	Contract Attributes are determined by the Contract template configuration. These attributes can be configured to track a wide variety of data types. Contracts using the PRISM 2011 Submit template will have four required attributes: Project Type, Primary Sponsor, Lead Entity, and Grant Amount. To enter Contract attributes, follow the directions below: a. From the Contract Attributes screen, ***click on the Contract attributes hyperlink*** b. ***Select values from the drop down menus or enter them in the text boxes*** c. ***Click Save and Close*** from the toolbar



What to do:	How to do it:
Validate Contract Attributes	Contract Attributes can be validated against rules establish in the template configuration. To learn about how to validate the Contract, follow the instructions below:

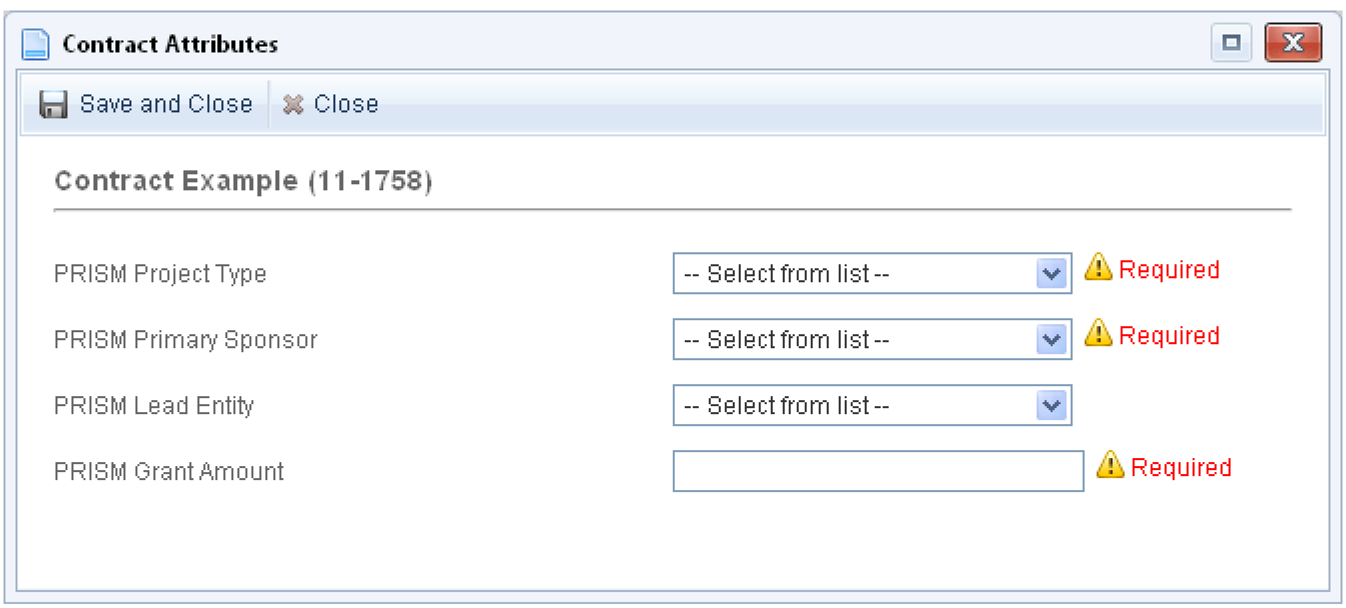
a. From the Contract Face Page, ***click on the Validate button***

b. ***If the Contract fails validation, click on the Edit Attributes hyperlink on the resulting page***

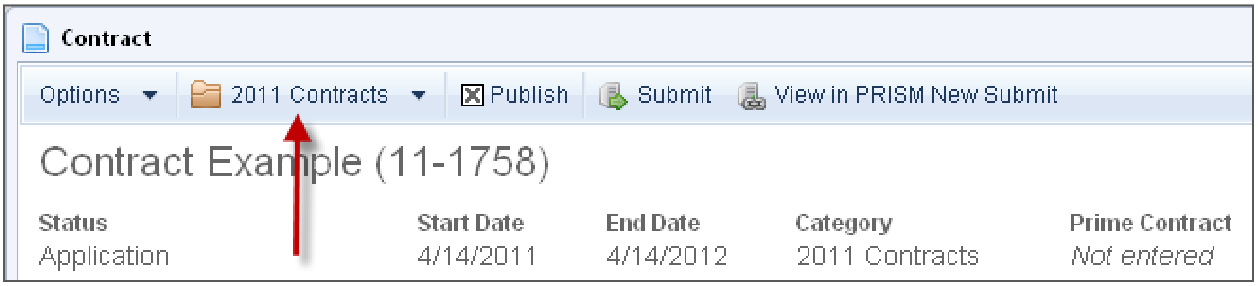


c. ***Complete the Required Attributes***

d. ***Click Save and Close*** from the toolbar

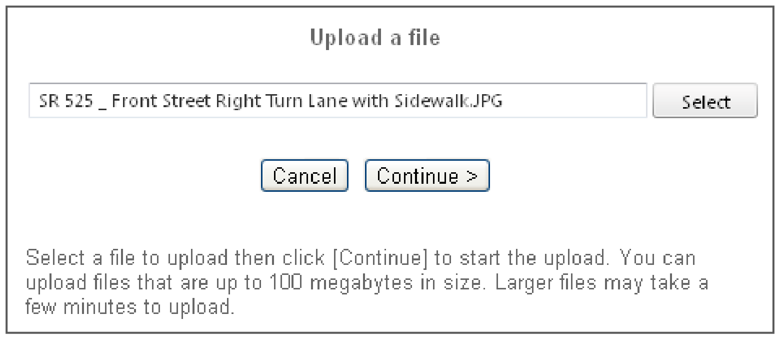


What to do:	How to do it:
Change Contract Category	a. From the Contract Face page, ***Move to Contract*** drop-down menu from the Contract Toolbar b. ***Select the Contract Category*** you would like to move the Contract to



12-3: Attach Documents and Photos

What to do:	How to do it:
Add File	a. From the Contracts Attributes screen, ***click on the Documents, attachments and photos hyperlink***
	b. ***Click on the Add File drop-down menu on the toolbar***
	c. ***Select Add*** File from the drop-down menu
	d. ***Click on the Select button*** to launch the file browser
	e. ***Locate a file*** on your machine or network
	f. ***Select the file*** and ***press Open***
	g. ***Click the Continue button***

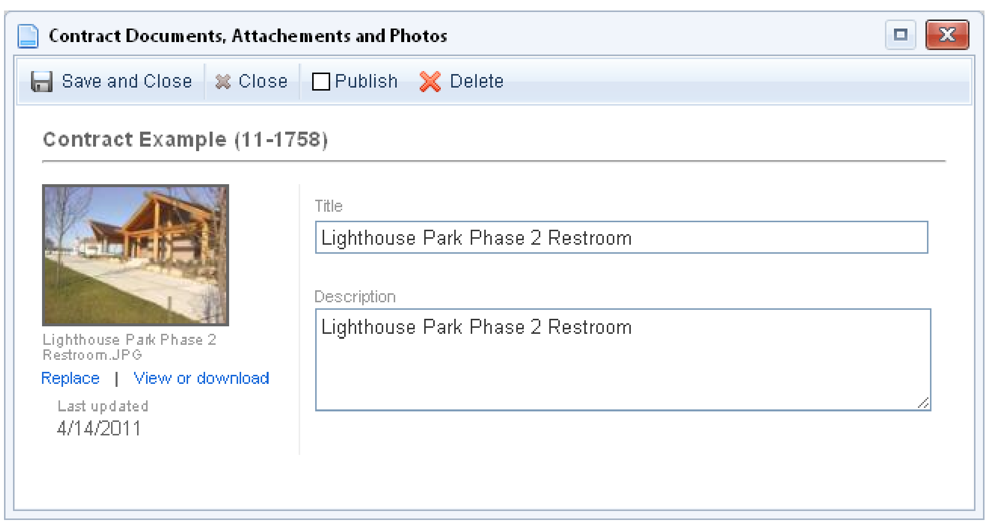


h. ***Enter a Title***

i. *Enter a Description*

j. *Check Publish to display file on Contract Face page and allow the public to see the file*

k. ***Press Save and Close***



What to do:	How to do it:
Add Link	Users can add a link to a webpage to their contract by using the Add Link feature. Follow the instructions below to learn about this.

a. From the Contracts Attributes screen, ***click on the Documents, attachments and photos hyperlink***

b. ***Click on the Add Link button on the toolbar***

c. ***Paste in or enter a webpage address (url)***

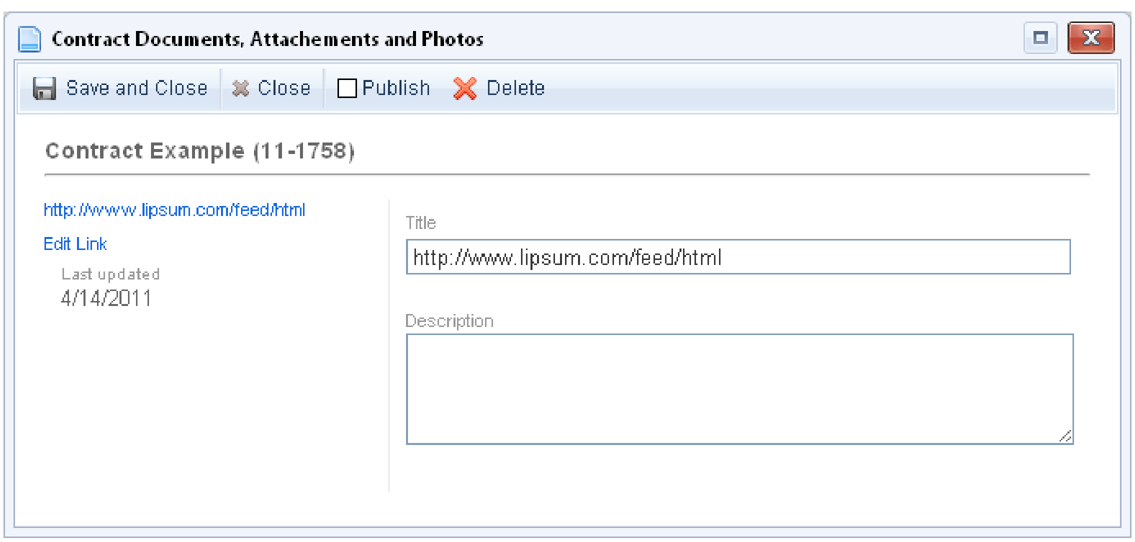
d. ***Click the Continue button***

e. ***Enter a Title***

f. *Enter a Description*

g. *Check Publish to display file on Contract Face page and allow the public to see the file*

h. ***Press Save and Close***



What to do:	How to do it:
Add Project File	Once a project is associated to a Contract those files can be shared.

a. From the Contracts Attributes screen, ***click on the Documents, attachments and photos hyperlink***

b. Click on the ***Add File*** drop-down menu on the toolbar

c. Select ***Add Project File*** from the drop-down menu

d. Select ***Project***

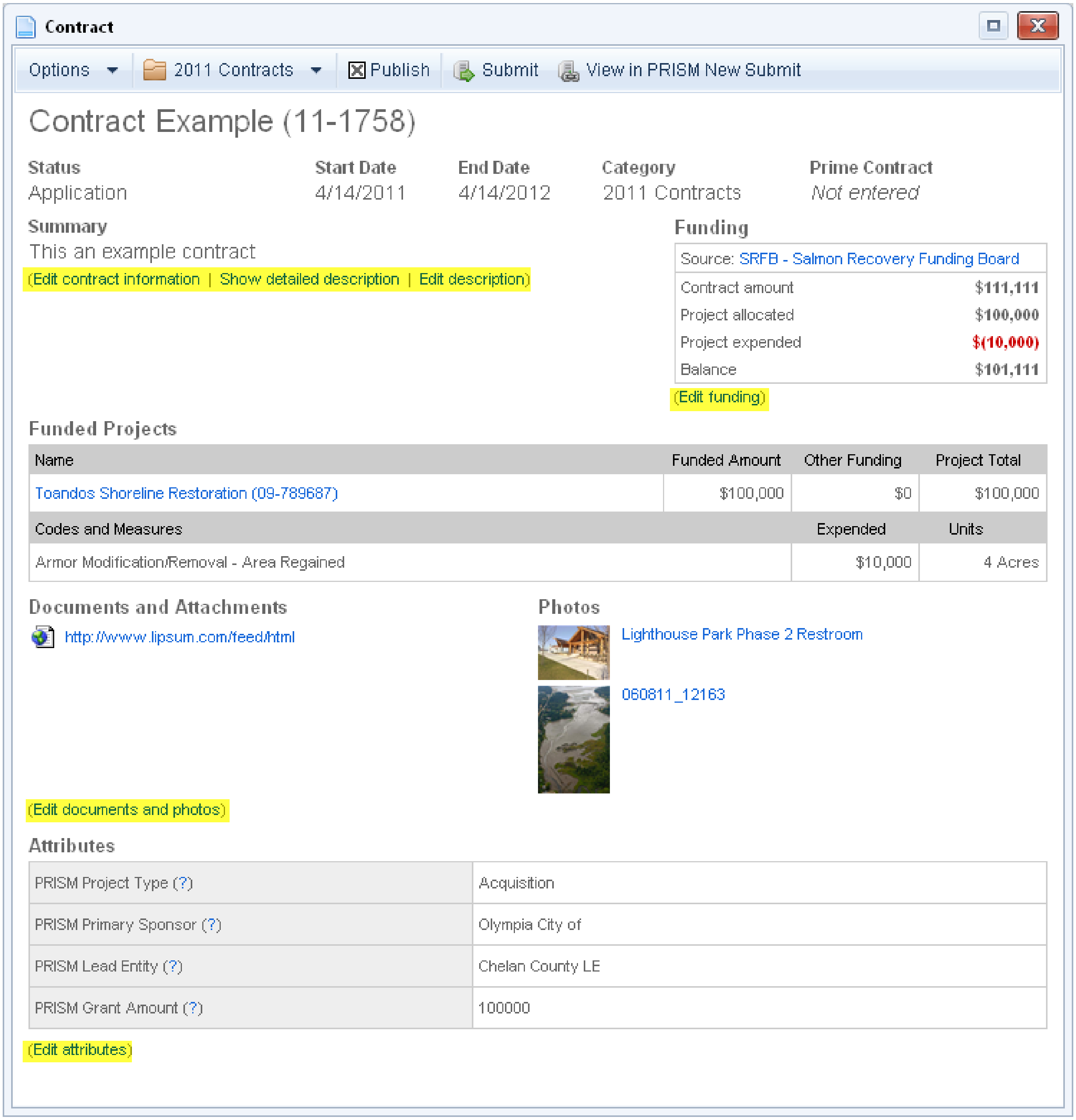
e. Select the ***File(s)***

f. Press ***Save and Close***

g. Press ***Close*** to return to the Contract Attributes screen

12-4: View Contract Information

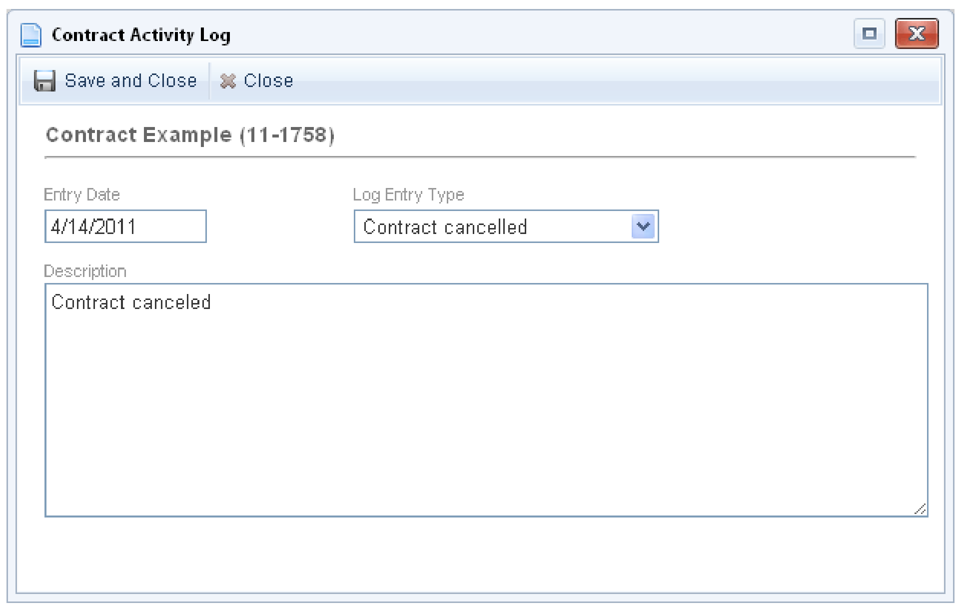
Once all information has been entered on the Contract attributes page, click ***Save and Close***. ***EKO-System*** defaults to the **Contract Face page**. From this screen, users can view all attributes of the Project. The fields highlighted on the project face page are the same as the fields on the Project Attributes screen.



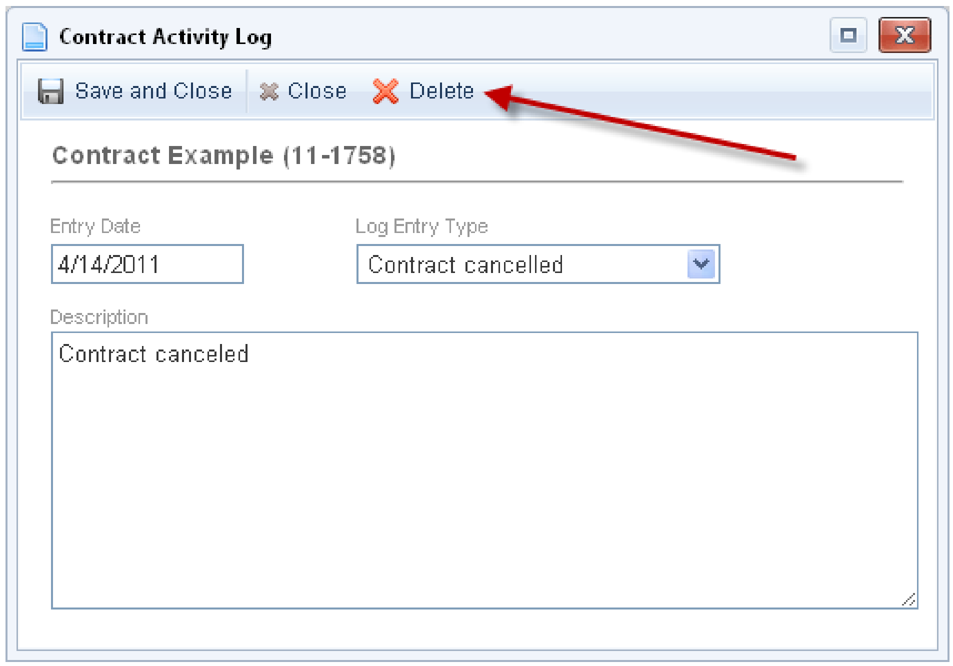
12-5: Contract Activity Log

The Contract Activity Log tracks activity on the Contract. Information such as when the Contract is created, submitted to an external database, and change of status is automatically written to the Contract Activity Log. Users can add their own entries to the Contract Activity Log to track any events that they want to track on the Contract.

What to do:	How to do it:
Add Activity Log Entry	a. From the Contract Attributes screen, click on the ***Contract Activity Log*** b. Click the ***Add Log Entry*** button c. Select an ***Entry Date*** d. Select an ***Log Entry Type*** from the drop-down menu e. Enter a ***Description*** of the Contract Activity Log Entry f. Click the ***Save and Close***

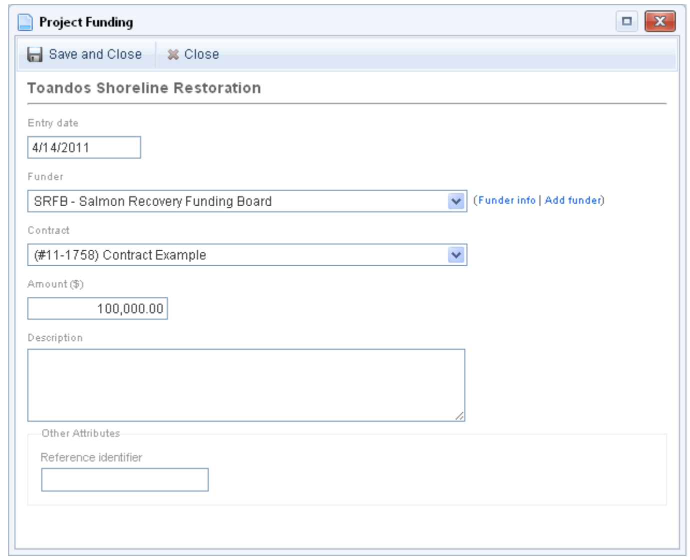


What to do:	How to do it:
Delete Activity Log Entry	a. From the Contract Attributes screen, ***click on the Contract Activity Log hyperlink*** b. ***Click on a Log Entry*** c. ***Select an Entry Date*** d. ***Click on Delete button from the toolbar***



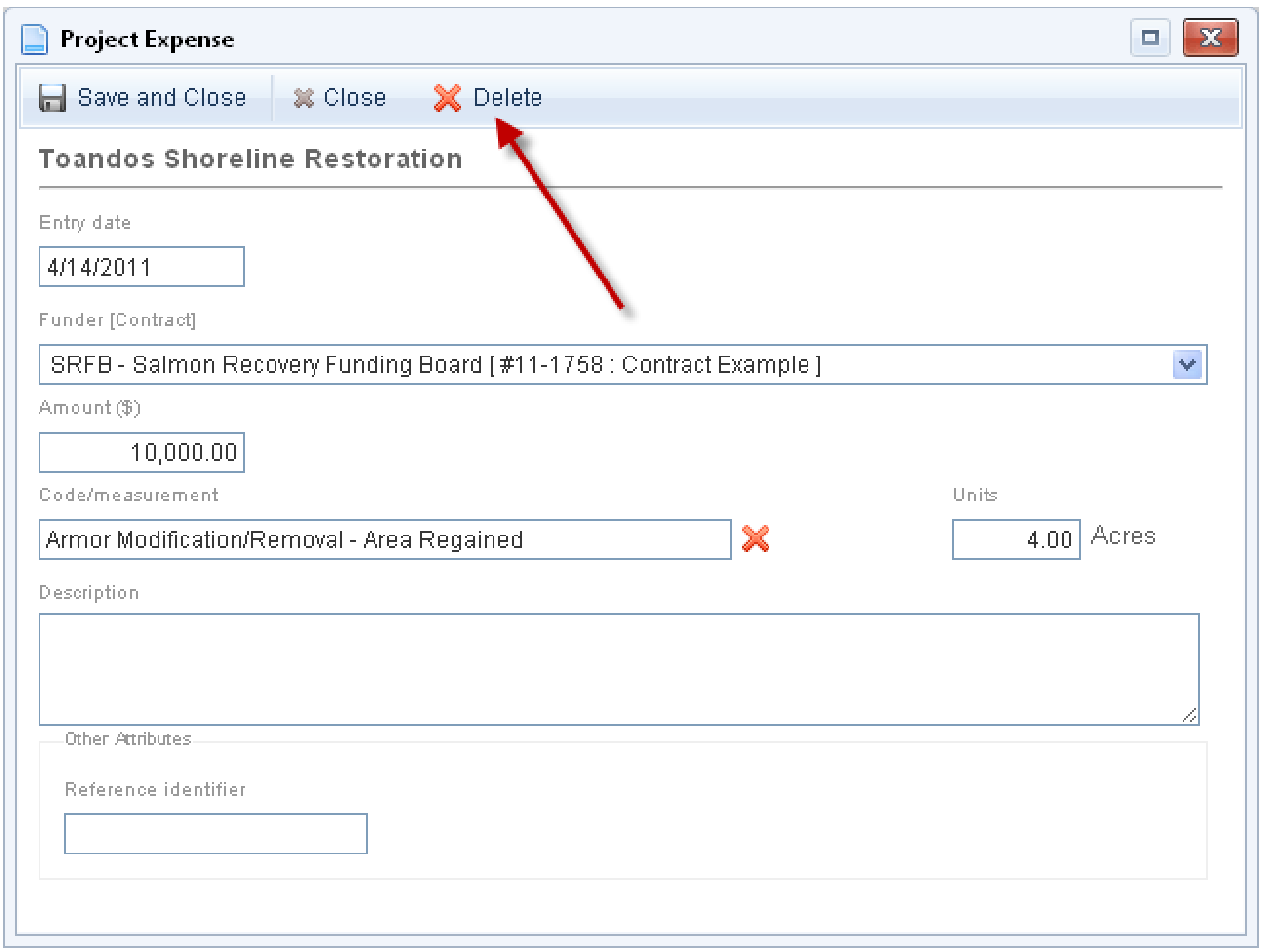
12-6: Associate Contract with Project

After creating a Contract, users can associate the Contract with one or many Projects to better track funding of the Project(s), add files from the Project, and display Project attributes on the Contract Face page. Users will associate the Contract with a Project by creating a Funding Entry against the Project using the Contract as the Funding Source. To learn more about creating a Funding Entry against a project click here.



What to do:	How to do it:
Associate Contract with Project	To associate a Contract with a project, user must enter the Projects module. Then, add the Contract to the Project as a Funding Source by creating a Funding Entry against the Project. a. In the Projects module***, locate the Project you want to associate with the Contract*** b. ***Open the Project*** c. ***Add the same funding source as your Contract to the Project*** by clicking edit beneath the Funding Source heading and searching for the Funding Source used by the Contract d. ***Open the Budget/Funding Summary by clicking Edit Funding*** e. ***Click the Enter Funding button from the Project Funding and Expense toolbar*** f. ***From the Project Funding screen, use the Contract Funding Source as the Funder*** g. ***Select the Contract from the Contract drop-down menu*** h. ***Enter in the Contract Funding amount*** i. *Enter a Funding Description* j. *Enter a Reference Identifier* k. ***Press Save and Close*** The Project and Contract are now associated. From the Project Face page, you will now see a link to your Contract in the Budget/Funding Summary section of the screen.

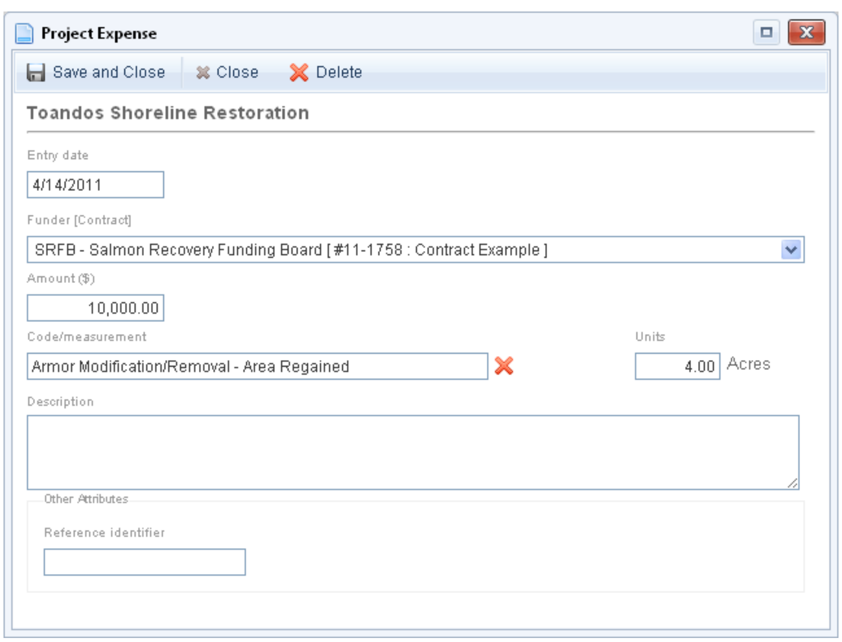
What to do:	How to do it:
Detach a Contract from Project	To detach a Contract from a Project, user must enter the Projects module. Then, remove the Contract from the Project as a Funding Source. a. From the Contract Face page, ***click on the Project*** you want to detach from the Contract b. From the Project Face page, ***Open the Budget/Funding Summary by clicking Edit Funding*** c. ***Click on the Funding Entry that was made using the Contract as the Funding Source*** d. ***Click the Delete Button***



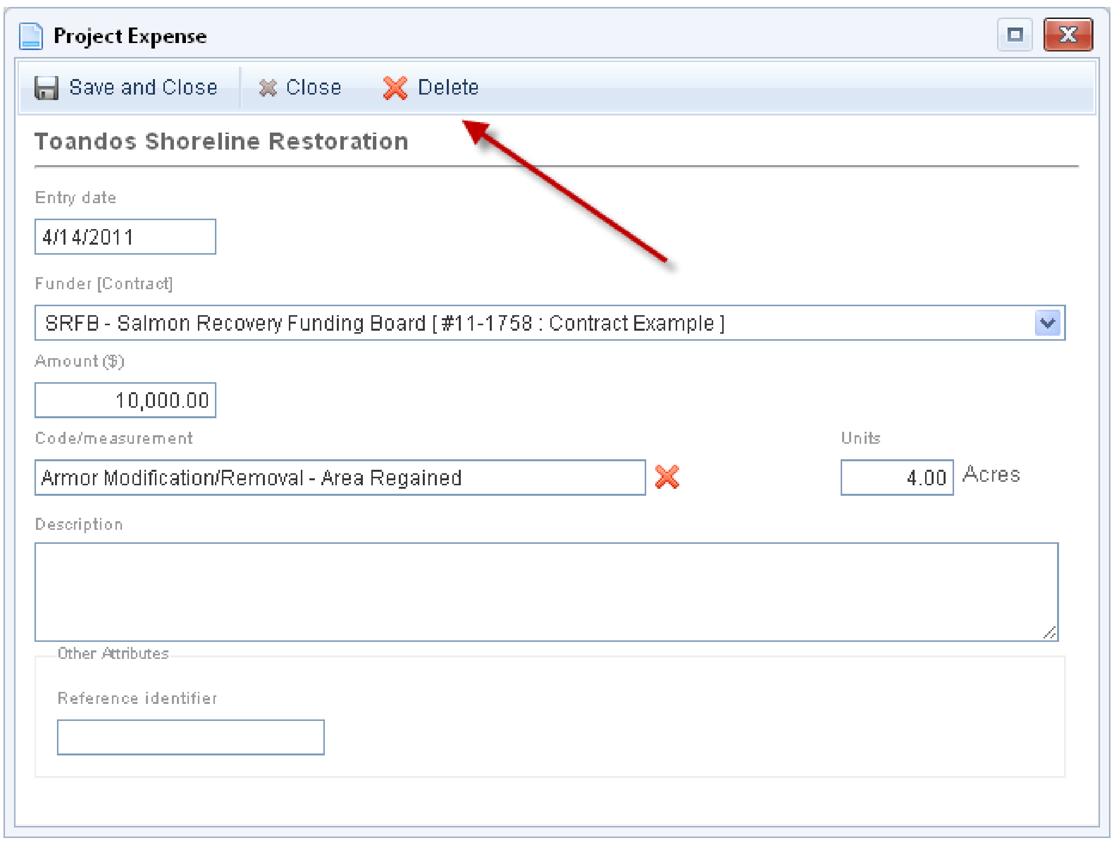
12-7: Display Project Attributes on Contract Face page

Project attributes can be displayed on the Contract Face page. To display Project attributes on the Contract Face page, users will need to create expense entries on the associated project(s) using the Contract as the Funding Source for those expenses.

What to do:	How to do it:
Display Project Attributes on Contract Face page	a. From the Contract Face page, ***click on a Project in the Funding Projects section*** (if you have already associated the Contract with a Project) to open the associated Project. b. ***From the Project Face page, click on the Edit Funding hyperlink*** c. ***Click the Enter Expense button*** d. ***Select an Entry Date*** e. ***Use the Contract as the Expense funding source*** f. ***Enter an Expense amount*** g. ***Select a Reporting Code/Measurement,*** Numeric or Basic • *If numeric, enter units* h. *Enter an Expense Description* i. *Enter and Reference Identifier* j. ***Press Save and Close*** NOTE: The Reporting Code/Measurement will now be displayed on the Contract Face page in the Codes and Measures section.



What to do:	How to do it:
Remove Project Attributes from Contract Face page	a. From the Contract Face page, ***click on a Project in the Funding Projects section*** (if you have already associated the Contract with a Project) to open the associated Project. b. ***From the Project Face page, click on the Edit Funding hyperlink*** c. ***Click the Expense Entry you want to remove*** d. ***Click the Delete button on the Project Expense toolbar*** The Reporting Code/Measurement will no longer displayed on the Contract Face page in the Codes and Measures section.



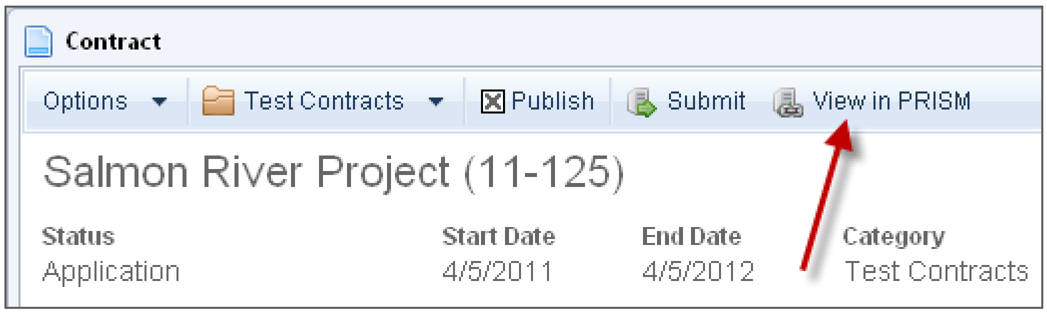
12-8: Submit Contract to PRISM or Other External Database

The Contracts module allows users to submit Contracts to RCO's PRISM database and potentially other external databases in the future. Contracts should only be submitted after all the attributes are filled in, Projects are linked to, documents are attached, and other information is added.

A Contract will only be submitted to PRISM and other external databases if initially created using the correct template. Templates will be clearly named so that users know which templates will allow them to submit the contract.

What to do:	How to do it:
Submit Contract	a. From the Contract Face page, ***click on the Submit button*** on the Contract toolbar b. **PRISM Only:** • ***Enter PRISM Username*** • ***Enter PRISM Password*** • ***Select PRISM Lead Entity*** c. ***Click the Continue button*** d. If successful, ***press the Close button*** The Contract will be submitted to PRISM or other external database. If submitted to PRISM, the Contract ID will be over-written with a PRISM Project ID. An entry will be made in the Contract Log

What to do:	How to do it:
View PRISM Submit Project Snapshot	Contracts submitted to RCO's PRISM database can be viewed by calling the PRISM Project Snapshot. This Snapshot page will allow users to easily see PRISM Project information associated with HWS Contracts and Projects. To call the PRISM Snapshot page, follow the instructions below: a. From the Contract Face page, ***click on the View in PRISM button*** b. ***PRISM Snapshot*** will open in another window.

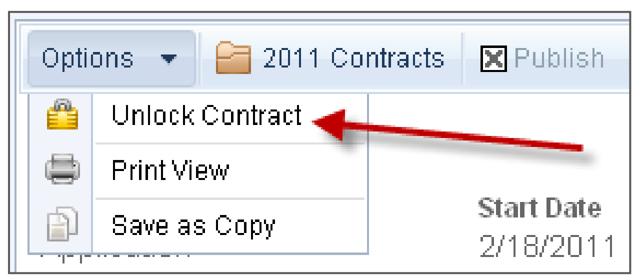


12-9: Lock Contract

Contracts can be locked to prevent accidental edits. Users can unlock Contracts if they need to make edits to it. Any user that can edit the Contract can unlock it.

What to do:	How to do it:
Lock Contract	a. From the Contract Face page, ***click on the Options drop-down menu*** b. ***Select Lock Contract***

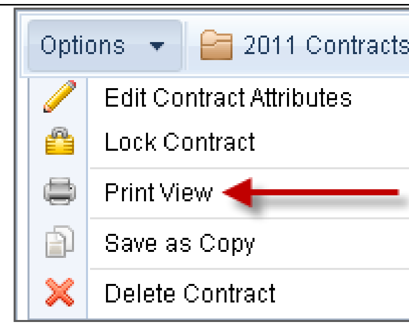
What to do:	How to do it:
Unlock Contract	a. From the Contract Face page, ***click on the Options drop-down menu*** b. ***Select Unlock Contract***



12-10: Contract Print View

Contract Print View allows users to view the Contract Face page in a cleaner layout for printing purposes.

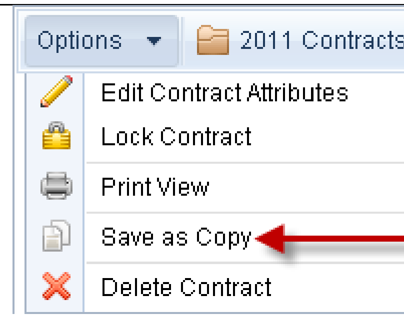
What to do:	**How to do it:**
Print View	a. From the Contract Face page, ***click on the Options drop-down menu*** b. Select ***Print View*** c. ***Print View*** opens in new tab d. **Close** new tab to return to Contract Face page



12-11: Save Contract as Copy

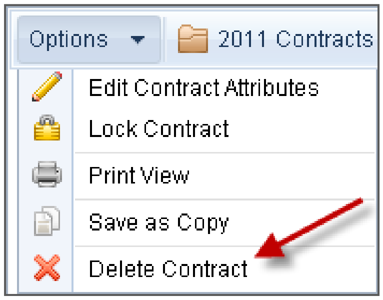
The Save Contract as Copy feature allows users to create a new Contract by making a copy of an existing Contract. This feature speeds up data entry, enabling users to start with copy of an existing Contract.

What to do:	How to do it:
Save as Copy	a. From the Contract Face page, click on the ***Options*** drop-down menu b. Select ***Save as Copy*** c. Contract Copy Opens d. ***Rename*** Contract Copy



12-12: Delete Contract

What to do:	How to do it:
Delete Contract	a. From the Contract Face page, click on the ***Options*** drop-down menu b. ***Delete*** Contract



NOTE: <u>The Contract cannot be retrieved after it is deleted.</u>