USER GUIDE

SNPLMA MANAGEMENT AND REPORTING TOOL (SMART)

SNPLMA's Web-Based Quarterly Reporting Database
Version 10

April 2021

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ACCESSING THE "SMART" APPLICATION

You will be provided a Username and granted access to the External BASS (BLM Application Security System) network that hosts SMART, it is recommended that you use Chrome. *SMART and BASS are two different things try not to confuse the two.*

You can now login with your "Active Directory" Username **_IF_** you are on the Department of The Interior (DOI) network. To make this happen your Username for SMART needs to be the same as your Username when logging into your agencies network. This will be coordinated when your account is initially set-up.

If you are teleworking, you will need to be connected to your network/VPN via Pulse or whatever your agency may be using to make the connections for this to work.

The URL to SMART through External BASS is:
https://www.bass.blm.gov/bass2/login.do;jsessionid=B4AF0A318E03C0537D1D3CD890F093D3?dispatch=preparePage

You can always access SMART via the SNPLMA Website here: https://www.blm.gov/programs/lands-and-realty/nevada/snplma

Once you are set you up as a user in BASS and SMART, the BASS system will send you an email with a temporary password. The sender will appear as **BASSAdmin@blm.gov.** You will need to use this "temporary" password within 48 hours, or it will expire, and you will have to contact the SMART Database Administrator (DBA), Deb at dackerman@blm.gov, to reset the password.

➢ **Enter the above noted URL in Chrome and log on with your Username and the temporary password from the email. Totally recommend copying and then pasting the password from the email because of the characters and things you can get in those temporary passwords.**

IMPORTANT NOTES

1. If you are logging in from an "internal " BLM network make sure that when you enter the URL you see the words "External Production" on the screen. If not your in the wrong place and you cannot get to SMART internally.

2. Our recommendation is that you DO NOT change to this type of access for SMART.

3. If you are on a DOI network and want to use the "Single Sign On" or "One Click" you do not need to enter a User and Password. You just click on the Login button.

Create a new, unique password.

When creating your password, note the Password Rules. ***Passwords will have to be changed every 60 days.*** You will not be allowed to take advantage of any of the last 24 passwords you may have previously used. The requirement to change your password every 60 days is one that comes from the National Operations Center(NOC) it is not something we can change. If you will be accessing SMART when not on the network, you will need to update and make changes and keep this password active otherwise you can ignore the emails when it is expiring and let it expire. Contacting Deb at dackerman@blm.gov for a reset is all that is needed.

The system will notify you when your password is about to expire. You will get this generic notice daily starting five days prior to the expiration of your password. Here is a sample of the email that you would receive:

From: BASSAdmin@blm.gov [mailto:BASSAdmin@blm.gov]
Sent: Thursday, June 04, 2015 11:00 PM
To: Joan Smith
Subject: BASS: Password Expiration Notification

Dear BASS User (jsmith):

Our system indicates that your BASS password expires IN 5 DAYS. In order to avoid your password expiring, which then requires submitting a Help Desk ticket to have it reset, please log into BASS (www.bass.blm.gov/bass2/) and reset your password.

Please do not reply to this email, as we are unable to respond to messages sent to this address.

IMPORTANT NOTES

1. If it does expire, DO NOT, put in a Help Desk ticket, you need only contact the SMART Database Administrator (DBA), Deb at dackerman@blm.gov, to have your password reset.

You can change your password at any time you do not have to wait for a notice to do so.

<u>Resetting your password.</u>

Go to the SMART application and login, before your password has expired, and choose My Profile.

After logging on, you will see a screen similar to the one below.

Click on the drop-down arrow and choose "Change Password"

Enter your new password two (2) times making sure to follow the "Password Rules".

You will get a confirmation of the change and then click on "Continue" where you will then select the SMART Application.

➢ **Click on "SMART Production" to enter the application.**
The first screen you will see is a Welcome Screen, which should display as shown below:

This screen has some information that can be very helpful. It shows you your User ID, Role, and what application you are in, and you can look up here to see the current period you are reporting on. In this example, you are entering your financial requests for your needs through FY2021 Q4 and entering your quarterly status updates for work accomplished in FY2021 Q2. This display is at the top for every screen so you will always know what is being required of you from any screen within the application.

BROWSER RECOMMENDATION

The recommended browser to use is Chrome.

You can use Internet Explorer if you would like but, displays are "wonky" and hard to view sometimes. Chrome does work best.

Please Note: **The SMART application will "time-out" after 15 minutes of inactivity. This will require you to login again. This is a BASS security requirement by the National Operations Center(NOC) in Denver and is not something that SNPLMA can change.**

LOCATING YOUR PROJECTS

There are two ways to access your active projects.

Method 1 (Recommended) Project Search: Use the "Project" selection in the top menu bar to search using several additional selection parameters to further narrow the search.

IMPORTANT NOTES

1. There are ways to narrow your search and get a smaller list to look at. For example, if you want to look at completed (CM) projects vs. (TO) (Active/Task Order Assigned projects") you would choose "Completed" from the drop-down list to get a list of all the projects with CM status. *(Note: Selection choices included on the drop-down list of status' are all of the choices that are available. However, the Entity User role will not be able to select and view Closed(CL) or Terminated(TR) projects nor will the Active and Inactive selections function.)*

➤ **Clicking on Search**. Making no additional selections will give you a complete list of all your Active Projects.

➢ **Clicking on the desired Sub Activity, Round, etc**. This will expand the category to show active projects within the category (those not yet closed or terminated). The screen shot below shows the active Forest Service projects in the Capital Improvements category. Categories with many active projects may require use of the scroll bar to see all projects.

This method is preferred for locating a project because it narrows the results so you can find the project you're looking for without having to scroll through multiple screens. You can also just type in a "Project Number" if you know it and just Search for that one project. If you're only looking for Round 16 projects select 16 from the Round option and then search.

Method 2 Dropdown List Search: Select the desired project from the category dropdown list on the left side of the Welcome Screen.

Remember you can see your "Role" in the upper right-hand part of the screen along with your Username...

This is the screen you see when SMART is *not open* for input. Contact your Program Manager if you need to update and or enter anything outside of the normal period of entry.

Return to Project Search Results |

PROJECT MENU: (F013, 14-1, WARD MOUNTAIN IMPLEMENTATION, PHASE 1)

No Access For WorkPlan.   No Access For Quarterly Status.   No Access For Annual Accomplishments.

New in FY20 is the ability to view a summary of your financial information at any time regardless of SMART being open or closed.
This data is updated at the beginning of each month

Contacts can also be updated at anytime.

Funding Processes   Project Contacts

Project Information

Project Of Concern:	Yes	**Work Plan Status:**	Approved
POC Status:	Orange	**Focus POC:**	No
Project Status:	Task Order Assigned	**Current End Date:**	08/31/2019
Status Date:	09/01/2014		

Status Update Comments and Program Mgr. Notes:

Project Number as the Sole Search Parameter: Selecting only a project number will result in a list of all active projects your access allows for you to see, regardless of category, with that project number. The sample below for FW15 resulted in two projects, one a Capital Improvements and one in Conservation Initiatives.

ACCESSING PROJECT MENU SELECTIONS

After locating the project, you want to update, you need to access the Project Menu. This is where you will be making all of you updates and entries for you projects.

➤ **Click on the "Project Menu" box to the right next to the project number**.

The Project Menu screen will be displayed. The sample below is for a Capital Improvements Project Round 17-1.

The Project Menu screen has five menu boxes available to Entity users.

From top left to right, the menu boxes are:

Work Plan: The Work Plan menu box (first block, top row) is only available when a new workplan is required for a new project or if the Program Manager (PM) has indicated that updates to the Workplan are needed.

Quarterly Status Update: This menu box provides access to enter all quarterly status information: overall percent complete, percent complete by deliverable, actual start and end dates for deliverables, and narrative status comments.

Annual Accomplishments: This menu box has two selections. The top selection is to display the previous year's annual accomplishment for reference only and is not available to be edited. The second selection is for entering the current fiscal year's annual accomplishment's and where you enter your Performance Measures when closing a project. There is also a checkbox labeled "Final Overall Accomplishment" to indicate that the information entered is the overall project accomplishment description required upon closeout of the project.

Funding Processes: This menu box allows you to enter the current funding needs for your projects and where you go to and enter the amount of expended/obligated dollars. Not a requirement for those projects funded through ASAP. This now shows your current "Funding Summary" regardless of whether SMART is open or not.

Project Contacts: This menu box allows you to verify or update project contact information. Please confirm each quarter that this information (names, email addresses, phone numbers) are correct. This choice is available regardless of whether SMART is open or not. Note: You can only have one Project Manager if you are entering a new one delete the old one first.

Navigating the Project Menu Screen: In the example below, the "Funding Processes" menu box has been accessed. To return to the Project Menu Screen, click the blue "Project Menu" selection above the title bar.

If the Project Menu Screen was accessed using the "Project" menu and selected parameters, you can move to another project in the same search.

➢ **Click on "Return to Search Results" above the title row on the Project Menu Screen.**

This will return you to your original search results (see below) based on the parameters that had been previously entered.

The user can now select another project to update from the original search by selecting "Project Menu" or locate a new project by entering new search parameters.

STEP 1: CREATING A WORKPLAN FOR NEW PROJECTS

Locate the project for which a workplan is needed.

➢ **Click on "Project Menu" then on the "Work Plan" menu box**.

The following screen displays with the message that no results were found because no deliverables, tasks, or subtasks have yet been entered.

➢ **Click on Create New Deliverable**

In the Implementation Agreement Section IX item (a)-I indicates that Deliverables (in the Work Plan) are to be identified as primary/anticipated/standard. New in FY2020 there is a drop-down menu from which to make this designation. This is a mandatory selection and is now the first thing to do when creating your deliverables. Any changes to older Work Plans will now require this entry to made as well now.

➢ **Select your Deliverable type from the drop-down.**

➢ **Select a deliverable from the drop-down menu for "Deliverable Description."**

➢ **Enter the Target Start and Target End Dates; Comments if needed.** ➢ **Click "Save"**

A message will be displayed that the deliverable has been saved successfully, and the date modified will display.

➢ **Click on "List Deliverables" to enter tasks or subtasks for the deliverable.**
➢ **Click on "Create New Deliverable" to enter the next deliverable.**

Review your entry. If you need to make a change to the entered dates or comments, do so and then click update. When you are satisfied with the deliverable entry, you can move on to entering tasks/subtasks for this deliverable or enter a new deliverable.

➢ **Click "Create Tasks."**

➢ **Enter the task description and any comments.** ➢**Select the Responsible Entity** ➢ **Click "Save"**

A message will be displayed that the task has been saved, and the date modified will display.

Review your entry. If you need to make a change in the description or comments, do so and then click update. When you are satisfied with the task entry, you can move on to entering subtasks for this task or enter a new task for the displayed deliverable.

➢ **Click on "List Tasks" to enter subtasks or to create an additional new task for the deliverable.**

➢ **After clicking on "List Tasks" if you get this screen you will need to enter your task.**

➤ **Otherwise you will see something like this and here you will click on "List Subtasks"**

This screen will show you all the tasks, this sample only has one and you can see what the Deliverable is and the Task #.

➤ **Click on "Create New Subtask"**

➢ **Enter the subtask description and any comments.** ➢**Select the Responsible Entity** ➢ **Click "Save"**

As with the deliverables and tasks, a message will be displayed that the subtask has been saved. You can review, edit if needed, and click update before moving to enter the next subtask, task, or deliverable.

➢ **To enter a new Deliverable, back out of the subtask screen by clicking "List Subtasks," "List Tasks," and "List Deliverables."** This sequence will take you back to the "Create New Deliverable" screen with the project description.

STEP 2: UPDATING QUARTERLY STATUS

➢ **Click on the "Project Menu" box of the project to be updated**.
➢ **Click on the "Quarterly Status Update" menu box to get to the project deliverables. Remember you are only reporting on Deliverables that you have started working on that are not 100% complete. If the deliverable is at 100% or does not have an Actual Start date you do not report on it.**

SNPLMA Management And Reporting Tool

DACKERMAN
System Administrator

SMART Test

Financial Input: FY 2021 Qtr 4 / Status Input: FY 2021 Qtr 2   Project   Uploads   Reports (Hyp)   Reports   Admin   Logout

Projects [collapse]
Capital Improvements
Conservation Initiatives
Eastern Nevada Landscape Restoration Project
Environmentally Sensitive Land Acquisitions
Hazardous Fuels Reduction Plans and Wildfire Prevention Projects
Lake Tahoe Restoration Projects
Multi-Species Habitat Conservation Plans
Parks, Trails, and Natural Areas
Pre-Proposal Planning (PPP)
Santini-Burton
Virgin River Habitat Conservation Restoration Plan and Ground Water Monitoring

Return to Project Search Results | Project Menu

QUARTERLY STATUS: (N103, 17-11, CONSTRUCT GRADE CONTROL STRUCTURE IN LAS VEGAS WASH)

Create New Quarterly Status

Current Statuses

Please enter Overall Project Complete Percentage   Overall Project Complete Percentage: 22 %   Save

8 items found, displaying all items.

Deliverable #: 1
Type: Standard
Other: Funding Instrument (1151 Direct Transfer Authorization)

	Target Start Date	Target End Date	Actual Start Date	Actual End Date
	08/01/2019	02/21/2020	08/01/2019*	

Tasks:
#1: Other: Issue Special Account Funds Notice
#2: Other: Work plan data entry in SMART
#3: Other: Request to Initiate
#4: Other: Initial Project Site Visit
#5: Other: Work Plan Approval
#6: Other: Execute Funding Instrument (1151 Direct Transfer Authorization)

Current Quarterly Status   Percent Complete: 80%   Add

Previous Quarterly Status
Request of Initial Funding Transfer and requesting of Work-plan approval.   Add/Edit

- You can see the Deliverable Type
- You see the List of Tasks for the Deliverable
- The list of deliverables will display the previous quarter's status comments and percent complete if previously entered.
- It will also display actual start and end dates if entered as well as the percent overall project completion.
- If there are more deliverables than can be displayed on a single page, additional deliverables are available on additional pages.

➢ **Click on the "[First/Prev] page number or Next/Last" to navigate through the deliverables**.

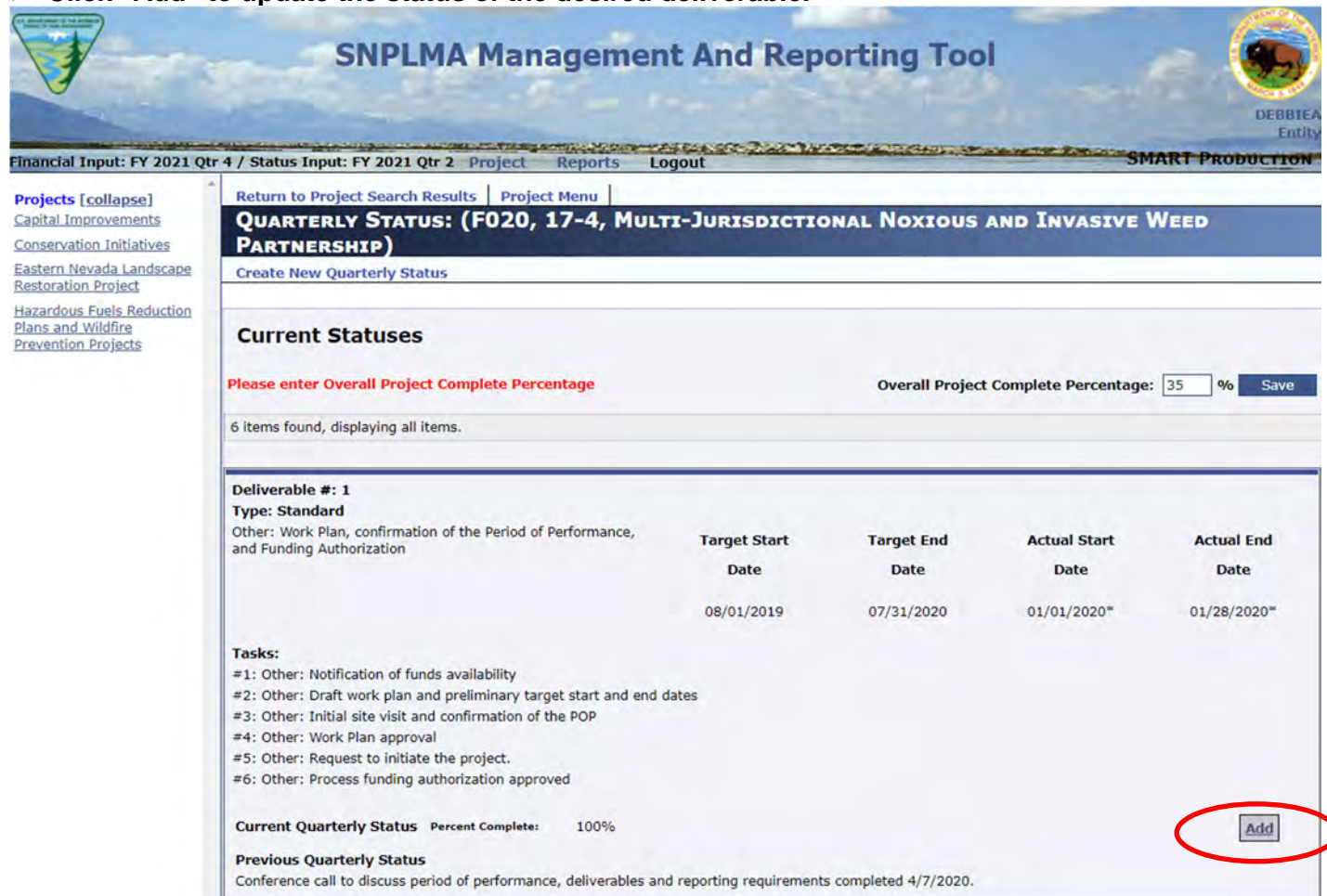**Create New Quarterly Status**

Current Statuses

Please enter Overall Project Complete Percentage   Overall Project Complete Percentage: [100] %   [Save]

15 items found, displaying 1 to 10.

[First/Prev] 1, 2 [Next/Last]

➢ **Click "Add" to update the status of the desired deliverable.**

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DEBBIEA
Entity

Financial Input: FY 2021 Qtr 4 / Status Input: FY 2021 Qtr 2   Project   Reports   Logout   **SMART PRODUCTION**

Projects [collapse]	Return to Project Search Results	Project Menu

Capital Improvements

Conservation Initiatives

Eastern Nevada Landscape
Restoration Project

Hazardous Fuels Reduction
Plans and Wildfire
Prevention Projects

QUARTERLY STATUS: (F020, 17-4, MULTI-JURISDICTIONAL NOXIOUS AND INVASIVE WEED PARTNERSHIP)

Create New Quarterly Status

Current Statuses

Please enter Overall Project Complete Percentage   Overall Project Complete Percentage: [35] %   [Save]

6 items found, displaying all items.

Deliverable #: 1
Type: Standard

Other: Work Plan, confirmation of the Period of Performance, and Funding Authorization	Target Start Date	Target End Date	Actual Start Date	Actual End Date
	08/01/2019	07/31/2020	01/01/2020*	01/28/2020*

Tasks:
#1: Other: Notification of funds availability
#2: Other: Draft work plan and preliminary target start and end dates
#3: Other: Initial site visit and confirmation of the POP
#4: Other: Work Plan approval
#5: Other: Request to initiate the project.
#6: Other: Process funding authorization approved

Current Quarterly Status   Percent Complete: 100%   [Add]

Previous Quarterly Status
Conference call to discuss period of performance, deliverables and reporting requirements completed 4/7/2020.

- Actual Start Date and Percent Complete are required in order to enter/update the status for a deliverable. You cannot enter an "Actual" date that is in the future. An actual date can only be as of today or earlier.

Please by sure to enter only "ACTUAL" Start and End Dates in the Actual Start Date and Actual End Date buckets. A guess as to what those dates will be are just that, a guess, an actual date cannot be in the future it has to have come to pass already. Program and Project Managers do have the ability to update and change this information so contact them should you need to make a change here.

0% is also a valid Percent Complete to use here.

- ➢ **Enter the Actual Start Date**
- ➢ **Enter the Percent complete as a whole number (e.g., 5, , 25, 50 75, 97, etc.) and do not include a percent sign**
- ➢ **Enter the Actual End Date only if the deliverable is 100 percent complete**
- ➢ **Enter the narrative describing the status of the project.**

(Status can include work that has been done, issues that are being addressed and the status of resolution, as well as work that is anticipated to be done in the upcoming quarter.)

- ➢ **Click "Save" when done entering current status information.**

After completing the entry and clicking "Save" the screen will display a message that the "Quarterly Status was saved successfully." It is recommended that the user review the entry to ensure that it's correct before moving on the the next deliverable.

➢ **Click "List Quarterly Statuses" to return to the list of deliverables.**

The updated information is now reflected under the deliverable(s) that have been updated. Note that instead of an "Add" button, there is now an "Add/Edit" button; this indicates the deliverable has been updated and provides a means to edit the entry if needed.

Repeat this process until all deliverables that have been started for the project have been updated.

STEP 3: FUNDING REQUESTS

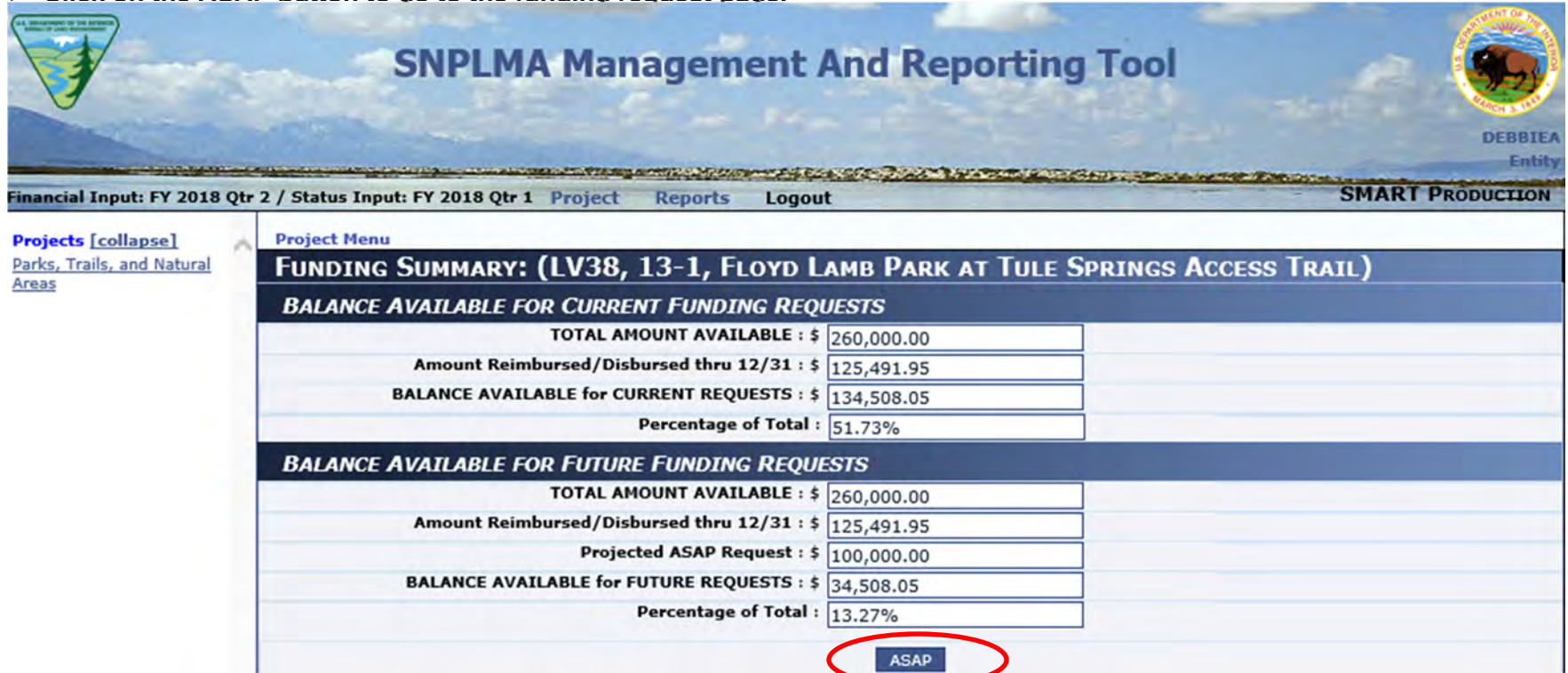➢ **Click on "Project Menu" to return to the Project Menu Screen.**

➢ **Click on the "Funding Processes" menu box.**

Note: Funding Requests can be edited until SMART closes. After saving, entity users will see an "update" button. Changes can be made or additional information can be added and then click the "update" button.

ASAP Funding Request

This first screen is the "Funding Summary" page. No entries are made on this page. This your "snapshot" of where your funding is currently at.

➢ **Click on the ASAP button to go to the funding request page.**

Users can enter information into four fields on the ASAP fund request page:

- "Entity Project/Accounting Number" – Completing this field is optional
- "Current ASAP Request" – This amount will be reflected on the financial summary page after
- "Final ASAP Closeout" – Click this box only when the project is being closed out.
- "ASAP Comments" -- Explain/justify the Current ASAP request amount (i.e., purpose of funds that will be drawn down).

If there is a dollar figure entered for the Current ASAP Request you will be required to enter ASAP Comments. You can no longer request funds without entering comments.

In the example below, the "Current ASAP Request" is $0.00 (entered without symbols or commas) and the purpose of the request to purchase materials has been entered in "ASAP Comments."

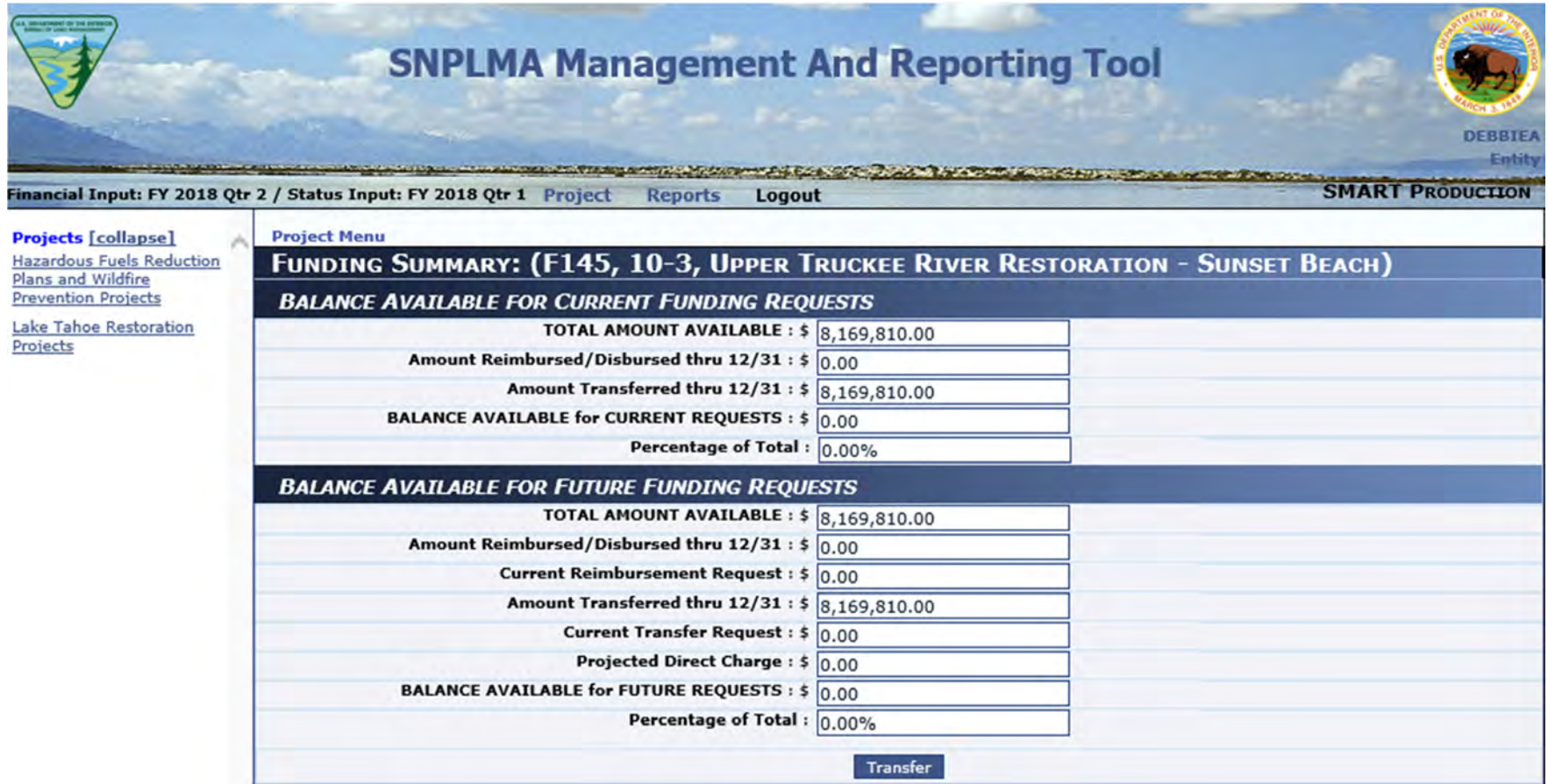➢ **Click Save after entering the request amount, justification comments, and other appropriate information.**

After clicking "save," a message in green text "**Financial Request was saved successfully**" will appear in the upper left portion of the screen (no screen shot available of this for ASAP at this time).

➢ **Click "ASAP Summary" to return to the financial summary page**. Review the fund summary page to ensure the amount requested is reflected and that the "Balance Available for Future Requests" has been recalculated reflecting a reduction equal to the amount requested.

Transfer Funding Request

Each funding request method works essentially the same with only slight differences. The screen shot below is the Financial Summary page for a project funded by 1151 direct transfer. No entries are made on this page.

➢ **Click on the "Transfer" button to go to the funding request page.**

(Note: Although there are fields for "Current Reimbursement Request" and "Current Direct Charge" as well as "Current Transfer Request," only the appropriate type of funding for the selected project will be available. In this F145 example, as in many other Federal projects, the sole method of funding is direct transfer. However, some older projects were funded first by reimbursement and then by direct transfer, so more than one funding method button may appear. If this occurs, only the current funding method should be selected.

Entities can enter information in five fields on the Transfer fund request page:

- "Entity Project/Accounting Number" – Completing this field is optional
- "Total Transferred Funds Expended/Obligated Thru …" – This information is required.
- "Current Transfer Request" – This amount will be reflected on the financial summary page after
- "Final Transfer Closeout" – Click this box only when the project is being closed out.
- "Transfer Comments" – Explain/justify the Current Transfer request amount, this is a mandatory entry if there is an amount requested in Current Transfer Request box. (i.e., why the funds are needed in this quarter vs. at a later time).

> **Click "Save" after entering the required information.**

The example below has entries under "Total Transferred Funds Expended/Obligated Thru #/##/####," "Current Transfer Request" and explanation/justification under "Transfer Comments" for the $50,000 transfer request. After clicking "update" the "**Financial Request was saved successfully**" message appears and the "% of Funds Expended/Obligated" is automatically calculated based on the entry under "Total Transferred Funds Expended/Obligated Thru #/##/####"

➢ **Click on "Fund Summary" to return to the financial summary page.**

It is recommended that Entities review the Financial Summary page to ensure the amount requested is reflected and that the "Balance Available for Future Requests" reflects a reduction to the "Balance Available for Current Requests" equal to the amount requested.

Direct Charge Funding Request

Most BLM projects are now funded by direct charge. The direct charge Financial Summary has the same fields as projects funded by Transfer.   As with all funding methods, no entries are made on this page.

➢ **Click "Direct Charge" to access the fund request page**.

For projects funded by Direct Charge, the amount is reflected as "Amount Reimbursed/Disbursed through ##/##/####" this is the amount that has been paid and does not include amounts obligated on contracts/agreements but not yet paid (i.e., unliquidated obligations).

Entities can enter information in five fields on the Direct Charge fund request page:

- "Entity Project/Accounting Number" – Completing this field is optional
- "Total Charged Funds Expended/Obligated Thru ##/##/####" Though not required to enter the funding request, this information is used by the SNPLMA Division to help evaluate the funding request and should be entered if available.
- "Current Direct Charge Request" – This amount will be reflected on the financial summary page after
- "Final Direct Charge Closeout" – Click this box only when the project is being closed out.
- "Direct Charge Comments" – Explain/justify the Current Transfer request amount (i.e., why the funds are needed in this quarter vs. at a later time).

In this example, $199,651.55 has been entered as "Total Charged Funds Expended/Obligated" – this figure includes amounts obligated on contracts/agreements but not yet paid (i.e., unliquidated obligations). In this example, the current direct charge request of $20,000 is entered as is the explanation/justification for why the funds will be needed this quarter.

➢ **Click "Save"**

After clicking "save," a message in green text "**Financial Request was saved successfully**" will appear in the upper left portion of the screen. (See below.)


> ➤ **Click Fund Summary to return to the Financial Summary page.**

It is recommended that Entities review the Financial Summary page to ensure the amount requested is reflected and that the "Balance Available for Future Requests" has been recalculated reflecting a reduction equal to the amount requested to confirm the data entered is reflected correctly on the Financial Summary page.

Reimbursement Funding Requests

➢ **Click on the "Funding Processes" menu box from the Project Menu Screen**
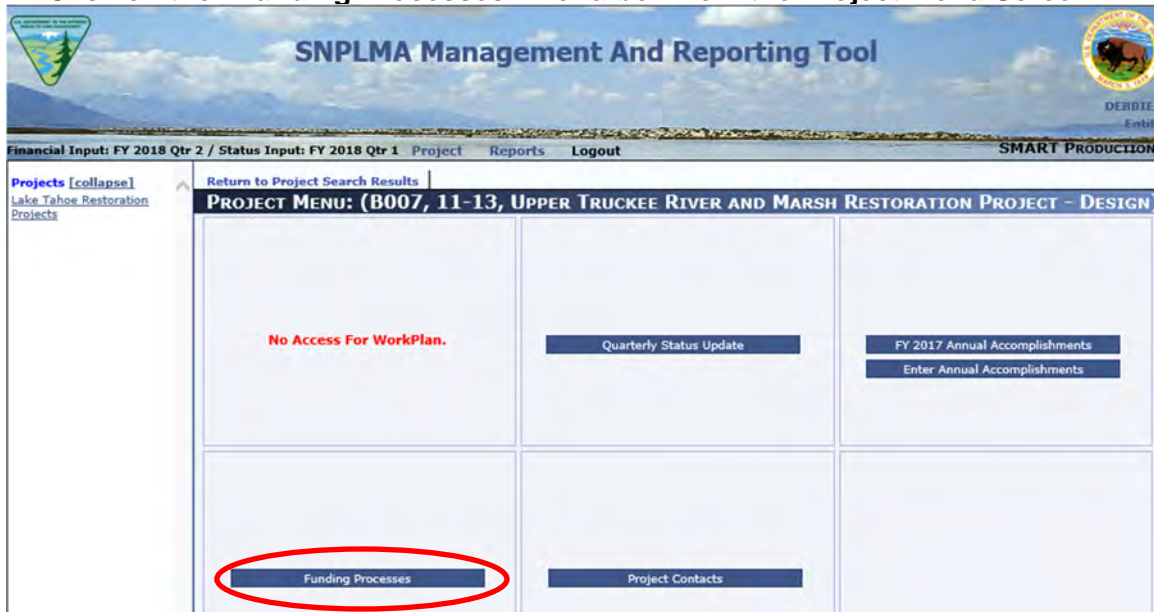
➢ **Click on "Reimbursement"**
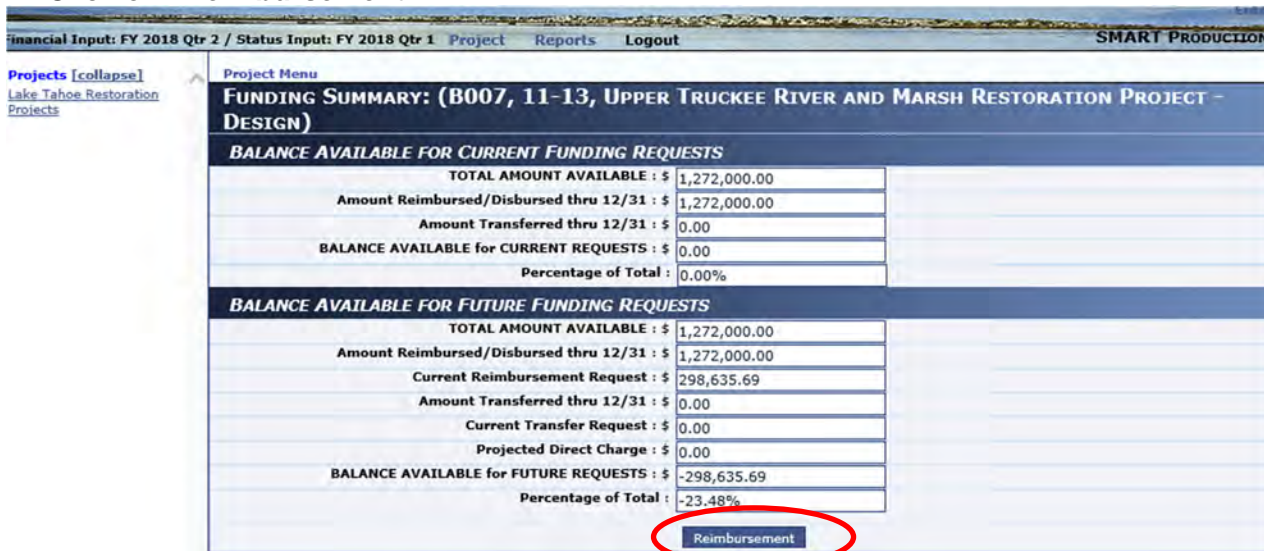
Entities can enter information in five fields on the Reimbursement fund request page:

- "Entity Project/Accounting Number" – Completing this field is optional
- "Total Reimbursed Funds Expended/Obligated Thru …" Though not required to enter the funding request, this information is used by the SNPLMA Division to help evaluate the funding request and should be entered if available.
- "Current Reimbursement Request" – This amount will be reflected on the financial summary page after saving/updating
- "Final Reimbursement Closeout" – Click this box only when the project is being closed out.
- "Reimbursement Comments" – Explain/justify the Current Reimbursement request amount (i.e., why the funds are needed in this quarter vs. at a later time).

➢ **Make the appropriate entries, then click "Save" or "Update"** *(The screen print below shows "update" because it was edited during final testing of the application.)*

After clicking "Save" a message in green text "**Financial Request was saved successfully**" will appear in the upper left portion of the screen.

➢ **Click Fund Summary to return to the Financial Summary page.**

It is recommended that Entities review the Financial Summary page to ensure the amount requested is reflected and that the "Balance Available for Future Requests" has been recalculated reflecting a reduction equal to the amount requested to confirm the data entered is reflected correctly on the Financial Summary page.

➢ **Click Project Menu to move to the next step in the quarterly update process.**

STEP 4: CONTACTS

➢ **Click the "Project Contacts" menu box.**

Review the contact information for accuracy (phone numbers, emails, etc.). ➢ **Click "Edit" to make needed changes**.

➢ **Click "Update" when changes are complete.**

➢ **Click "Create" to add a new contact.**

There can be only one contact designated as the "Project Manager." If a project manager has already been designated, the "Project Manager" will not display as a choice in the drop-down for Contact Type. You will have to "Delete" the existing Project Manager". Other choices are financial specialist, SNAP, Other, and SNPLMA Program Manager. Robert Taylor has been entered as the Program Manager in the example below.

➢ **Click "Save" when done entering the information for the new contact.** A message will appear that the **"Contact was saved successfully."**

➢ **Click "List" to see the revised list of all contacts.**

SNPLMA Management And Reporting Tool

DEBBIEA
Entity

Financial Input: FY 2018 Qtr 2 / Status Input: FY 2018 Qtr 1   Project   Reports   Logout   SMART PRODUCTION

Projects [collapse]
Capital Improvements
Conservation Initiatives
Eastern Nevada Landscape
Restoration Project

Project Menu

SEARCH CONTACT: (NP99, 16-4, RECONSTRUCT AND RESTORE THE HISTORIC WHEELER PEAK CAMPGROUND)

List | Create

5 items found, displaying all items.

Type	First Name	Last Name	Position Title	Phone Number 1	Phone Number 2	Email	Actions
Financial Specialist	Anita	Hansen	Administrative Officer	775-234-7501		anita_hansen@nps.gov	Edit
Other	Tod	Williams	Chier-Planning and Resources	775-234-7560			Edit
Other	Curt	Dimirick	Superintendent	775-234-7502		curt_dimirick@nps.gov	Edit
Project Manager	Anita	Hansen	Project Manager	775-234-7530		Anita_hansen@nps.gov	Edit
SNPLMA Program Manager	Robert	Taylor	Capital Improvements Program Manager	702-515-5139		r50taylo@blm.gov	Edit

STEP 5: ANNUAL ACCOMPLISHMENTS
There are two times that partners must enter annual accomplishments. One time is in the first quarterly report of a new fiscal year for the previous fiscal year and the other is at project closeout.
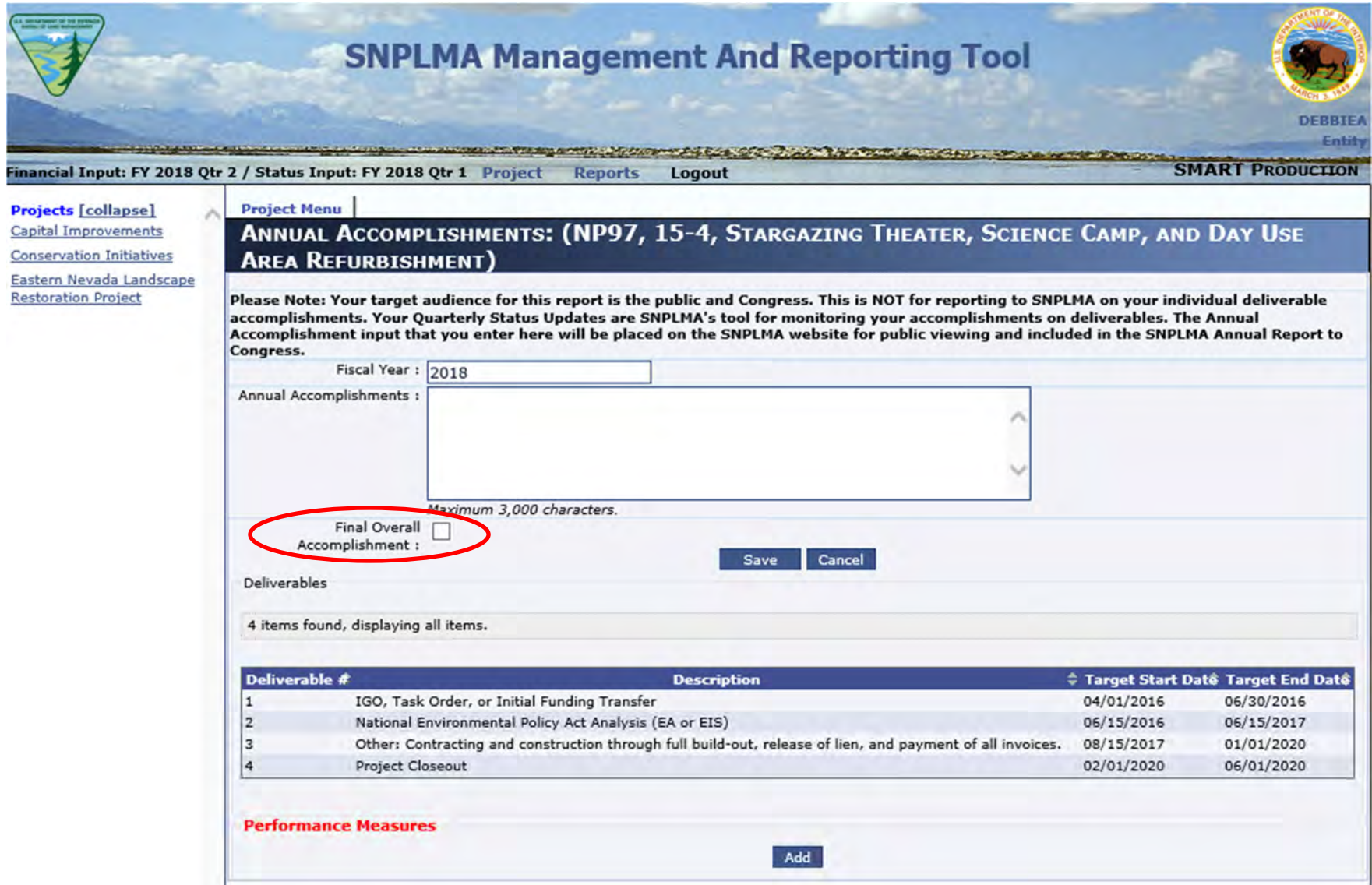
Return to the Project Menu. ➤ **Click on "Enter Annual Accomplishments"**

In Q1 of the New Fiscal Year describe the overall project accomplishments, progress, milestones achieved in the prior fiscal year. Double check with your Program Manager on specific requirements and needs.

Project Closeout: Summarize the <u>overall project accomplishments</u> from beginning through completion. Closeout accomplishments must include the SNPLMA performance measures with applicable numeric measurement accomplished by the project (see Appendix J-3 in the Implementation Agreement – Part II, dated February 5, 2013, for the performance measures).

➢ **Click the Checkbox for "Final Overall Accomplishment" if it is the last time you will be reporting and the project is going to "Closed"**

➢ **Click "Save" when done entering your Accomplishment.**

STEP 6: Performance Measures

Performance Measure can now be entered separate and no longer included with your Annual Accomplishment's Narrative. The choices available for you to choose from are customized to your particular program.

➢ **Click the "Add" button under the Deliverable list on the Annual Accomplishments page when you are ready to enter your Performance Measures.**

The first drop-down is your list of valid performance measures.

You will be entering each performance measure one at a time. You will only see the PM's that are relevant to your program.

The second drop-down is your list of valid Fiscal Years

Since you can select from and enter PM's for any Fiscal Year you will only see the entry under Annual Accomplishments for the current FY. You will not see entry available at the bottom of the AA entry screen for the previous FY. Just enter any PM via the current FY screen.

The third drop-down is your list of valid "Units of Measure"

You may notice that there is not a "Delete" button. If you make a mistake contact your Program Manager and let them know. This entry here in SMART is only for gathering the data it is then taken from here and exported to the SNPLMA Financial DB where it can be used for reporting.

➢ **Click the Save when you are done entering your PM and then Add to enter the next one. You will back out of this screen by clicking on Annual Accomplishments.**

Step 7: ACCESSING REPORTS
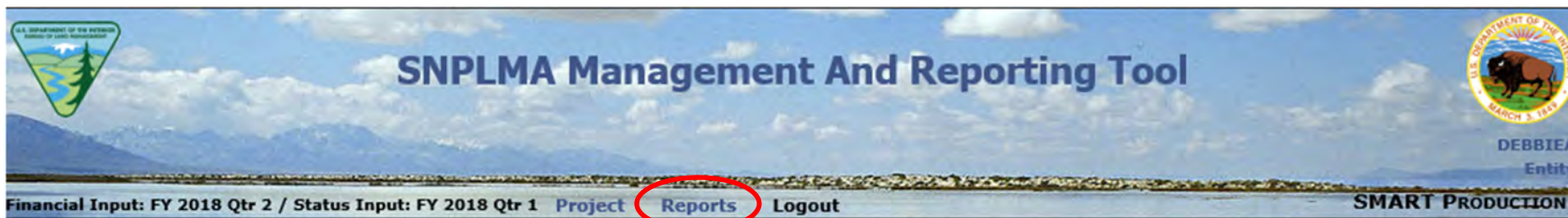
➢ **Click on Reports from any page to get to the Report menu.** Reports are opened in a new window so closing reports will not close SMART.

Reports can be run at any time. SMART does not have to be open. You can also run reports on all of your projects and not just the current active projects.

New instructions are included at the top of the screen to help you out. I will go though some of the quirks of using this new application here.

1st now you will select your report. Previously you made your parameter selections prior to selecting your report. Now because of how OBIEE works there are individual "parameter selections" or "dashboards" for each report.

Example: Here is the "dashboard" for the Project Work Plan(s) Report

This will open up on a new Tab.

Note that the default parameters are "All".

So be sure to make your parameter selections before running anything.

You also can see your login name displayed on the dashboard.

This is so that the application knows who you are and therefore knows what you can see and run reports for.

The dropdowns for parameters will only display what you are authorized to view/see projects for.
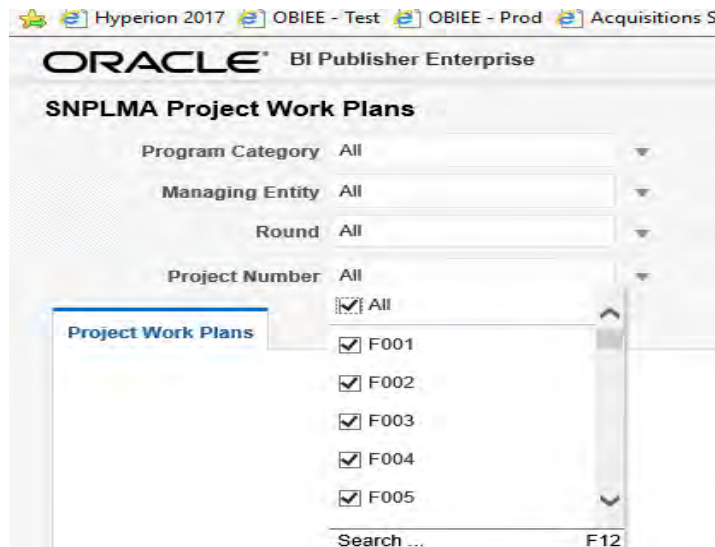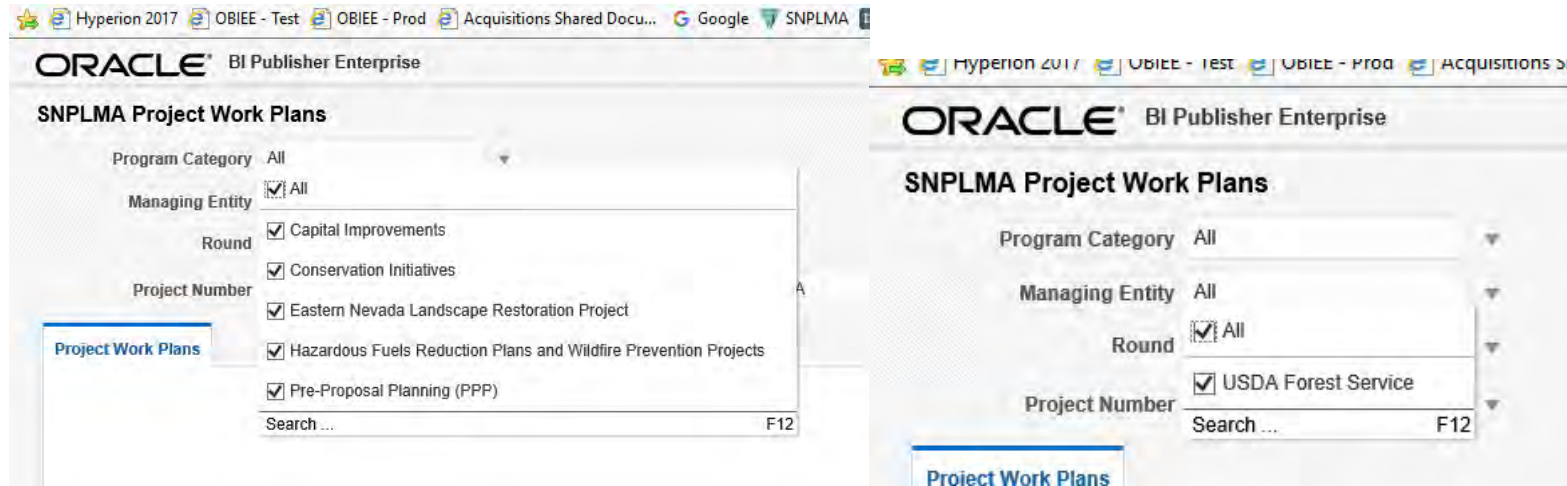
Note you can easily see the list of all your projects and not just the "Active" projects making easier to run reports for any project regardless of the status.

Making your selections is a little tricky now.

Once you make your initial selection, as I have here of ENLRP, you then need to "click" anywhere to lock that choice in. For example click here.

Do not click on the Apply button as that will "run" the report.

Make a selection and then "click" out on your desktop somewhere. Do not "click" on Apply yet. Do this for all of your selections until you have made them all.

Once you have made all of your selections then click on Apply

You will see the following:

You can scroll through all the pages here but most likely you are going to want to print and or save the report you just ran. Over to the right side you will this:
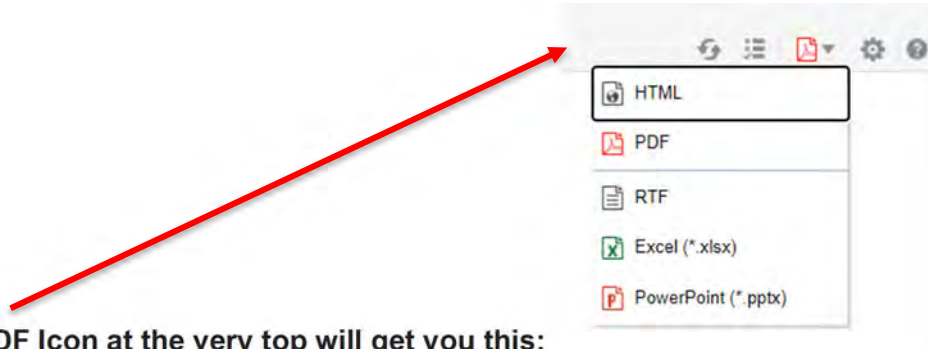
Clicking on this PDF Icon at the very top will get you this:

Doing anything from this menu will only change how the display is for you. It is recommended that you don't go this route.

It is recommened that click on the download or printer and go from there.

If I am looking at the PDF as shown above you can click on the "download" symbol:
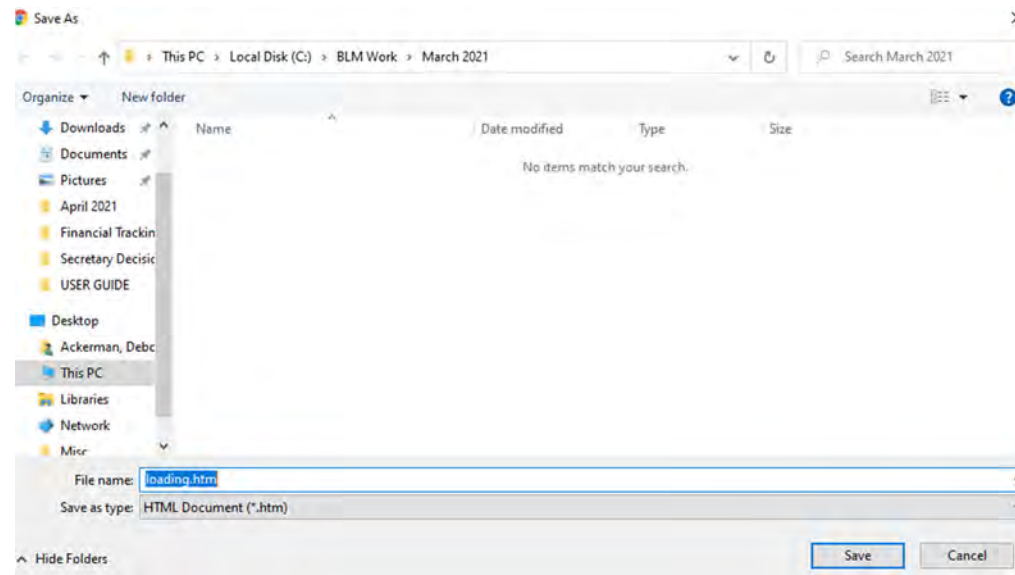
This dialog box will pop up:

From here you can browse to where ever you want to save the pdf and name it what ever you would like.

But should you want to physically print the report, click on the little printer icon: 🖨

When you do this you will see the more familiar Print Dialog Box:

From here you also save a pdf or print the report on any number of printers that are available to you.

Make your printer selection and then click on the Print Button:

SUMMARY
The first step should be completed for all new projects. Steps two through six should be repeated for each project that is not either closed or terminated.
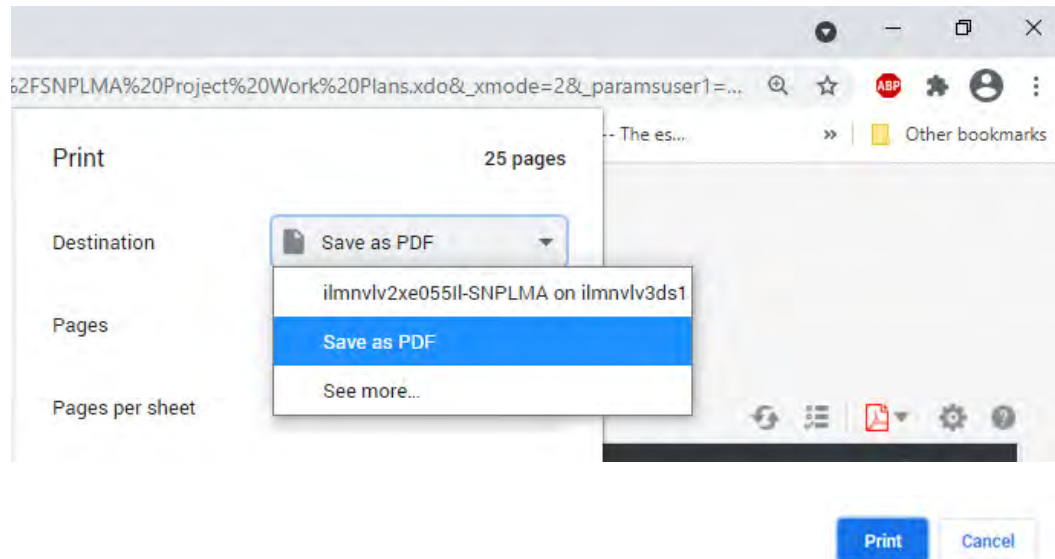
- Problems, issues, and errors should be reported by email to the System Administrator, Deb Ackerman at dackerman@blm.gov. If she cannot resolve the help request, she will submit a remedy ticket to the NOC.

- Requests to reset BASS passwords should be sent to Deb Ackerman at dackerman@blm.gov with the Subject Line "**Reset BASS Password.**"   Your user logon ID needs to be included in the body of the email.

- For questions on this manual or other "how to" questions related to SMART, you may email Deb Ackerman at dackerman@blm.gov or call her at 702-515-5130.

- As always, you may contact your Program and Project Managers for assistance with your SNPMA questions.