SWIMS CORE MODULES
USE GUIDANCE DOCUMENT

ADOPTED BY THE OSWCC, NOVEMBER 2007

Per the Ohio Soil and Water Conservation Commission's (OSWCC) adoption of the SWIMS Program Use Policy, the following guidance defines those fields in the individual core modules ***required*** to be populated, and those tasks to be completed. Input of this information and completion of these tasks will provide required data for local and state level reporting.

1. **Cooperator Module:**

For any clients entered in SWIMS, the following information is required.

- ☐ First Name
- ☐ Last Name
- ☐ Telephone Number (Home)
- ☐ Address
- ☐ City/Town
- ☐ Zip Code
- ☐ Primary Interest
- ☐ Parcel or Tract Number(s) – only required if you plan to use the Conservation 6 Note feature.

2. **Cooperator Projects Module:**

Each SWCD should capture as much of their "technical" work as possible in this module. The following fields/tasks are to be completed for each individual Cooperator project created.

- ☐ Project Name
- ☐ Program Type
- ☐ Project Type
- ☐ Actual Start Date
- ☐ Assign BMPs/Services to each Project
- ☐ Mapping, in GIS, of each assigned BMP/Service upon installation/delivery.
- ☐ Input of "Practice Measurement" (e.g. acres, feet, instances) for each assigned BMP/Service upon installation/delivery.
- ☐ Input of "Installed Date" for each assigned BMP/Service upon installation/delivery.

3. **Initiatives Module**

Each SWCD should capture as much of their "education and outreach" work as possible in this module. The following fields/tasks are to be completed for each individual Initiative created.

- ☐ Initiative Name
- ☐ Program Type
- ☐ Initiative Type
- ☐ Actual Start Date
- ☐ "Events" (found under Events tab) are to be added to record/report all activities actually accomplished for each Initiative.
- ☐ At a minimum, the following fields are required to be populated for each "Event" entry:
    - Date;
    - Presentation/Activity Type;
    - # of Presentations/Activity; and
    - # of Attendees/Participants

4. **Timesheet Module**

- ☐ SWIMS timesheet is the only recognized timesheet by the Ohio Soil and Water Conservation Commission and is to be used by all SWCD staff for time keeping.
- ☐ The timesheet will track leave earned, used and balances for all employees.
- ☐ Timesheet records will be available at all times for review by the DSWR staff and ODNR Audit Section staff.
- ☐ Time spent by staff working on individual Cooperator Projects and Initiatives will be charged to the applicable Cooperator Projects(s) or Initiative(s).

AGRICULTURAL RELATED PROJECTS IN THE SWIMS PROGRAM

SWIMS Help Sheet

This document will provide guidance to SWCDs on how to set-up the SWIMS program so that Agricultural Projects and Best Management Practices (BMPs) completed by SWCDs can be captured for reporting to local entities and sponsors, and for statewide reports.

LAND AND WATER PROJECTS

In order to make projects conducted with SWCD assistance reportable, SWCDs should create in SWIMS a separate Land Water (L & W) project for each Project they're involved with. This would apply to any "on the land" project that the SWCD would like to capture staff time for, as well as the BMPs and quantities completed with the project.

Project vs. Practice

There is a lot of confusion as to whether or not a Land and Water Project in SWIMS is setup by the "project" or the "practice". The answer is: It depends on how you want to charge your staff time.

For example: Joe Smith has been approved for an EQIP contract that contains the following CNMP, Manure Storage Structure, Roof Runoff, and Filter Strip practices. You have a few options on how to enter this information into SWIMS:

1. **EQIP-Smith-Headquarters:** This is setup as one big project that allows work on any of the above BMPs to be used to charge time to. Under the practice tab, you would be able to add the individual BMPs and capture quantities for each BMP. The drawback is that you cannot capture time on the individual BMPs you have worked on. Time spent on the CNMP will be lumped in with time spent surveying the filter strip. For contributing agreements and to have the ability to track time spent on the individual BMPs you will want to have some separation.

2. **Projects: EQIP-Smith-CNMP and EQIP-Smith-Headquarters:** This allows you to charge time spent on the CNMP separately from all other work on the EQIP contract.

3. **Some other combination of practices that you want to track time on specifically**: If your office wants to see how much staff time is being spent on Filter Strips, then all Filter Strip practices should be setup as separate projects.

4. **Charging time to a specific BMP** within a project is now an option in SWIMS. As long as you list the BMPs in the BMP tab, a check box in timesheets will allow you to attach your hours to that specific BMP, if so desired.

A. Project Set-up:

Step 1: Creating/naming the projects in the L&W module.
Use of a consistent naming convention will allow for consistent reporting results. For example please use the following type of naming convention: **Program – landowner name – Project or practice**

Examples:

- EQIP – Jones – Pasture Management
- CRP-– Weston - Waterway
- 319 – Smith- Riparian Buffer

Putting "Program Type" in the front of each L&W project name, will allow querying to be done on all projects that contain "EQIP" or "319" or "CRP" ~~the~~ project name. This will also group all like projects together on your L&W projects list.

Once the project is created in the L&W module, time can then be charged by staff against each individual project. Summary reports and queries are then available for each project showing individual employee or entire staff time spent on a project.

Step 2: Choosing a Project "Category"
When setting up the project in the L&W module, select the most appropriate type from the project "**Category**" list. Do not leave this blank, as reports will be completed based on this box.

Step 3: Choosing a "Program" Type
From the "**Program"** type list, choose one of the following which best describes the project. This may be EQIP, 319, CRP, or another local option, but as above, do not leave this blank as reports will be completed based on this box as well.

Step 4: Assigning BMPs to the Project
To spatially capture and record the work being completed by SWCDs, the BMPs that are assigned to a L&W project are "drawn and saved" in the L&W module's GIS interface. Drawing and saving the BMPs in the GIS then allows reporting to be done by: SWCD, Township, 11 digit watershed, 14 digit watershed, State "House and Senate" districts as well as Federal Congressional district. The BMPs you will assign to Agricultural projects will be used to delineate the acres in the practice planned, the length (ft.) of the planned practice, or the instances of occurrence depending on the BMP selected.

Please assign the proper BMPs to each project. These are found on the L&W BMP list that exists in the L&W module. To access the list, click on the "Add BMP" button, then choose the following BMPs:

- All individual Projects should have at least one BMP added to locate and define the BMP being installed in this project. From the BMP list choose the appropriate BMP(s) and assign it/them to the project.

- For each BMP that you assign/add to the project, click on/highlight them with your mouse/cursor, then click on "Edit BMP" button, when the "Edit BMP' box appears on the screen, enter the total acres/feet/instance in the "Practice Measurement" field. Then click the "OK" button to save.

- When you go into the SWIMS GIS to draw and save the BMP(s), simply locate on the aerial where the practice to be installed is located and draw the shape (shape to be drawn is predetermined by the BMP chosen). BMPs quantified by acres are drawn as a polygon, BMPs quantified by feet are drawn as lines, and BMPs quantified as instances are drawn as points).

B. Charging Time To Projects - Additional Info

Once projects are set-up as L&W projects, you then have the ability to charge time against them. By using the comment box on the Timesheet you can describe the activity or activities that the hours charged against the project represents.

Remember, since the Timesheet "Comments" box is queriable, you can very easily run a query to obtain hours spent doing specific activities for individual Wildlife projects. <u>This does require the consistent use of consistent verbiage to describe those activities.</u> This can be easily accomplished by creating a list of activities that can then be cut and pasted by SWCD staff into the Timesheet comment box. A sample list might include the following:

- Survey
- Design
- Planning
- Follow up

As long as you consistently cut and paste the activities into the comment box, you can run a query to show time spent on that particular activity.

C. Conservation 6 Notes

Conservation 6 notes are accessible either through the Client or L&W module. The 6 notes allow you to capture the date and notes for a particular visit or phone call with a landowner/client. This is a good way to document follow up visits or occasions where additional information/contact was given to the person.

SWCD PROCESS FOR ENTERING POLLUTION COMPLAINTS IN THE SWIMS POLLUTION COMPLAINT MODULE

Step 1: Enter The Cooperator Information For The Complaint

This will include information for both the Alleged Violator as well as the Complainant. Both of these have to exist as Cooperators in the Cooperator module.

- ☐ After logging into SWIMS, select the *Cooperators* icon from the main SWIMS toolbar on the left side of the screen.
- ☐ Then click on *Cooperator Search,* the "Cooperator Search" page comes up, enter the cooperator's last name and click *Search*. Do this for the both the alleged violator and the complainant.
- ☐ If the cooperator name is returned in the "Search Results", single click the entry to select it and then press the "Edit" button to open/display the cooperator details. Click on the "Locations" tab to display the Tract or Parcel information that has been entered for the Cooperator.

  Important: The alleged violator's tract or parcel associated with the pollution complaint/investigation **must** be entered prior to completing the complaint, entering any Communication notes, (cons 6 notes), or completing the PIR in the SWIMS Pollution Complaint module. *It is not required to enter tract or parcel information for the Cooperator who is the Complainant.*

- ☐ If the Cooperators (alleged violator and complainant) have not been entered, click "Cooperators" on the main SWIMS toolbar, then click "*Add Cooperator"*. This will bring up a blank Cooperator "Details" screen. At a minimum, you will need to populate the following fields: 1) First Name, 2) Last Name, 3) Address, 4) City, 5) State 6) Zip Code and 7) County.

  Important: Once completed then be sure to add the applicable tract or parcel information under the *Locations* tab for the alleged violator.

- ☐ If the alleged violator is **unknown**, use the following information to create an "Unknown" Cooperator.
  - First name: **Violator**
  - Last name: **Unknown**
  - Address: **Unknown**
  - City: **Unknown**
  - County: **Use the actual county name**
  - Tract #: **9999**
- ☐ Click *OK* to return to the *Cooperator Search* screen
.
- ☐ Continue to **Step 2**

Step 2: Begin Work In The *Pollution Complaints Module – Complaint Tab*.

☐ Click on the *Pollution Complaints* button on the main SWIMS toolbar on the left side of the screen, then click on *Pollution Complaints"*.

☐ The *Pollution Complaint/Pollution Investigation Report Search* page opens.

☐ Click *Search* to see if the complaint has been entered. If not, select the *New Complaint* button on the right side of the page.

☐ Complete all information on the Complaint screen down through the comments box and select the ***SAVE*** button at the top left of the screen before entering the Cons. 6 notes. If your 6 notes are long, SWIMS can time out before you finish and all the information you have entered will be lost. The only way you'll find out that SWIMS has timed out is when you go to *Save* and have to log in again. (**Remember, SAVE early and often)**

Note: Ensure that you have selected an *"Alleged Violator"* before you "Save" the complaint. If you have not done so, the SWIMS generated complaint number will be incomplete (i.e. – Mercer-2007-_______). If the alleged violator is unknown, select the "Unknown" cooperator that you created.

☐ To enter a 6 note, click the grey box located next to the "*Click here to add a new record*" statement at the bottom of the page. Then double-click on the date cell. You must enter the date using the following format: yyyy-mm-dd. To select a tract/parcel double click on the tract button; pick the applicable tract/parcel off the drop down list. To better see the *Tract/Parcel* numbers, select any tract and then select the *Planner* box, this will expand the *Tract* box and make it easier to see which tract/parcel number you picked or would like to pick. This also applies to the *Note* box.

Notes:

- When entering in the *Note* field, you can use the "Enter" key just like you would in a word processing program. This will not cause you to lose the page as it does in other SWIMS modules.
- Conservation 6 note entries can be created in MS Word (highly recommended) and then cut & pasted into the 6 note box. The advantage is ease of typing as well as spell check.

☐ If in the complaint module, you generate cons 6 notes for *Violator Unknown* on *Tract #9999*, those 6 notes will always be associated with *Violator Unknown* on *Tract #9999*. If you change the alleged violator in the complaint module to a known person, you should cut and paste the applicable 6 notes from *Unknown* to the new person's 6 notes.

☐ When done entering information, click on the "Change Status" button near top of the screen; select "Complaint Entered."

☐ Then Select the *Save* button at the top left of the screen. The complaint has now been entered in the system.

☐ Continue to **Step 3**

Step 3: Completion Of The "*PIR – General*" Form And Other *"Forms"* As Required.

- ☐ On *Complaint* page, click on "*Here*" button (right side of page, just below box labeled "DSWC Use Only"). This will generate the "*PIR – General*" form for the complaint.
- ☐ Then click on the "*PIR – General*" tab and complete the PIR form for the complaint.

- ☐ **Important Note:** Question 3 requires you to enter a latitude and longitude reading (in Degrees, Minutes, Seconds format). This information MUST be entered on the PIR form or NONE of the information entered on the form will be SAVED,

  The following websites/programs are helpful for determining/finding latitude and longitude readings.
  - http://itouchmap.com/latlong.html
  - Google Earth

  <u>**Note**</u>: On question 6, depending on the rules that have been violated, additional PIR forms may need to be completed. If additional PIR forms are needed, click on the *"Enable/Disable Supplemental Forms"* button found at the end of Question 6. This will activate the appropriate supplemental form(s).

- ☐ Complete any required additional forms.

- ☐ When all PIR forms have been completed, return to the "Complaint" tab, click on the "Change Status" button near top of the screen, and select "PIR Submitted."

- ☐ Select the *Save* button at the top left of the screen.

- ☐ The PIR(s) is/are now in the system.

SWIMS SET-UP GUIDANCE FOR CAPTURING/REPORTING SWCD URBAN ASSISTANCE

Following is guidance regarding how the SWIMS program can be set-up so that "Urban" work completed by the SWCD for a County, Township, Municipality, or other Unit of Government, can be captured and reported both locally and at the State level as well.

In the SWIMS program there are three different methods, which can be used to capture/record time.

1 **Timesheet Module Time Codes/time code details –** these can be utilized when the work/time to be captured is mostly administrative and nothing needs to be mapped/saved in the GIS, and there is no "attendance" or total "participants" information that needs to be captured/reported.

2 **Initiatives** - should be used when the work/time spent on an individual task, event, function, etc. needs to be captured/reported. Initiatives should also be used when attendance numbers /participant information needs to be captured/reported.

3. **Land & Water Projects –** use when work/time to be captured/reported involves installation of a BMP or providing a service (e.g. ditch maintenance, subdivision review~~s~~, site review, etc.). You can also record acres, feet or instances, depending on the type of BMP being installed. Drawing and saving the BMP(s) assigned to the Land & Water project in the Land & Water GIS allows township, county, major watershed (11 digit HUC), minor watershed (14 digit HUC), Ohio House and Senate Districts, U.S. Congressional District and Municipality to be captured and reported on.

SETTING UP LAND AND WATER PROJECTS

In order for Urban practices installed "On the Land" or "Urban Assistance" provided to, a County, Township, Municipality, or other Unit of Government to be reportable, the SWCD should set-up a separate Land and Water (L & W) project for each entity to which the SWCD is providing service. This will allow the SWCD to then be able to keep track of time spent with that entity and be able to report that time.

Naming Projects

When creating the L&W Projects, a consistent naming convention should be used when naming the individual L&W Projects, doing so will allow for easier querying/reporting. Inserting the word "Urban" in each Project name will allow querying to be done on all Projects that contain "Urban" in the project name. Following are some example L&W project names:

- Urban - Erie County
- Urban - Blue Rock Township
- Urban - City of Painesville

Drawing/Saving "BMPs" in the L&W Module GIS

In order to geographically capture urban work completed by the SWCD, BMPs should be assigned to each of the Urban L&W Projects. These BMPs can then be drawn/mapped and saved in the L&W module's GIS component.

One of the first steps is to determine which BMPs would need to be mapped.
Following are some examples of BMPs:

- Site investigations
- Inspections
- Subdivision Reviews
- Inventory and Evaluation, aka I & E

By drawing and saving the BMPs in the GIS the following attribute details are captured and are then reportable: township, county, major watershed (11 digit HUC), minor watershed (14 digit HUC), Ohio House and Senate Districts, U.S. Congressional district and Municipality. An example might look like this:

- <u>L&W Project Name</u>: Urban - City of Painesville
- <u>BMP assigned to the Project, drawn/saved in GIS:</u> - Subdivision Reviews

The SWCD would go into the L&W module GIS component and draw/save a point in the correct location on the aerial map identifying where the subdivision reviews were/will be completed. Potentially the SWCD might perform this BMP (sub-division reviews) many times for the City of Painesville. Therefore to capture the number of "instances" this BMP was completed, the SWCD would record the number completed in the "Practice Measurement Instances" box located on the "Edit BMP" screen.

By using the described process, reports could then be generated by the SWCD, the DSWC or the OFSWCD, which would show the total number (instances) of site inspections completed by SWCDs. The fact that the BMPs had been drawn in the GIS would provide the ability to run the query based on township, county, watershed, or any of the other attributes captured as a result of spatially locating the practices.

Charging Time to L&W Projects

Once a Project has been created in the L&W module, SWCD staff can then charge time against it. You can charge time against a project from the Timesheet module (this is faster) or by opening the L&W Project, clicking on the Staff Time button and entering the number of hours charged.

Using "Comments" Box in the Timesheet Module for Querying Purposes

Use of the "comments" box (found on the "Enter Time" screen in the Timesheet module) also provides a means of tracking/reporting/querying Urban work done by the SWCD. Consistently entering comments in the "comments" box describing work that was performed for a County, Township, Municipality, or other Unit of Government can be queried for. An easy way to accomplish this would be to create a list of activities in a MS Word or Excel document, which could then be <u>consistently</u> copied and pasted into the comments box each time. The list of activities could be text, reference numbers or a combination of both.
A sample list might look like the following:

101 - Urban I & E
102 - Urban Site Investigations
103 – Urban Site Inspections
104 – Urban Violations

Consistent entry of the activities into the comments box would allow the SWCD to query the County, Township, Municipality, or other Unit of Government, as well as the specific work/service provided within that municipality. For instance you could run a report that shows how much time has been spent for the City of Painesville L&W Project, where "I & E" has been entered in the comments box. The report will then show you instances where an employee charged time to this project with "I & E" in the comments box, giving you total hours spent towards that activity in that location.

L&W Summary

To begin using the different L&W Project tracking methods described thus far in this document, a SWCD would simply need to do the following:

- Create L & W Projects for each entity where Urban work/service will be provided (e.g. County, Township, Municipality, or other Unit of Government)
- Identify a list of BMPs/services that will be drawn/saved in the GIS to spatially identify those activities. Talk to Martin Joyce about adding them to the SWIMS BMP list if they currently don't exist.
- Create a list of "Details" or "Reference Numbers" that can be consistently entered in the "Comments" box (found on the "Enter Time" screen in the Timesheet module) by SWCD staff when entering their time. This will allow you to query information entered in the comments.

Tracking time using Initiatives vs. Time Code Details

Urban work/services provided by the SWCD can also be captured by using Time Codes/time code details or by using Initiatives (set up in the "Objectives" module). Depending on what your reporting/tracking needs are, that determines whether to use an Initiative or a Time Code/time code details to capture time spent on urban work.

The Objective/Initiative module is used to track education and outreach (non-conservation practice) activities completed by the SWCD. If an SWCD is interested in how much time is spent on individual urban projects, then setting them up as Initiatives is the best option. By doing so, time can be charged back against individual Initiatives.

In reality a SWCD might set up an Initiative that would complement an existing L&W project – e.g. an Initiative for education and outreach associated with NPDES Phase II activities. When doing this, it makes sense to name the Initiative the exact same thing as the L&W project. By doing so it will then be very easy to run one query and pull the time charged to both the L&W project as well as the Initiative. This will allow for easier, more complete reports. If you decide to capture time with Time Codes/time code details you end up with a total amount of time spent for all activities not individual ones.

FORESTRY RELATED PROJECT SET-UP GUIDANCE IN THE SWIMS PROGRAM

For Woodland Management Plans, Timber Harvest Plans (THP), and Notice of Intent Forms (NOI) completed by SWCDs

This document will provide guidance to SWCDs on how to set-up the SWIMS program so that Forestry related assistance provided by SWCD's can be captured for reporting to local entities/sponsors and for statewide reports as well.

WOODLAND MANAGEMENT PLANS

In order to make Woodland Management Plans created with SWCD assistance reportable, SWCDs should create in SWIMS a separate "Cooperator Project" for each management plan they're involved with.
Note: As with all Cooperator Projects, "Cooperator" name and address information as well as Parcel/Tract information for the "Cooperator" can be captured if you wish. This information is entered in the SWIMS "**Cooperators**" module.

Cooperator Project Set-up

Step 1: Creating/naming the projects in the Cooperator Projects module.
Use of a consistent naming convention will allow for consistent querying results. For example please use the following type of naming convention:

- Forestry – Smith-Forest Management Plan
- Forestry – CAUV-Jones Forest Management Plan

Putting "Forestry" in the front of each Cooperator Project name, will allow querying to be done on all projects that contain "Forestry" in the project name. This will also group all "Forestry" projects together on your Cooperator Projects list.

Once the Forestry related project is created in the Cooperator Projects module, staff can then charge time against each individual project. Summary reports and queries are then available for each project showing individual employee or entire staff time spent on the project(s).

Step 2: Choosing a "Project Type"
When setting up the project in the Cooperator Projects module, choose "Woodland" from the "Project Type" drop-down list.

Step 3: Choosing a "Program" Type
From the "**Program"** drop-down list, indicate the program that the landowner is participating in. Choose one of the following:

- CAUV
- EQIP

- Ohio Forest Tax Law (OFTL)
- SWCD Program
- Tree Farm

Step 4: Use of the Cooperator Projects "Description" field
Information inserted in the "Description" field (this field is found on the "Details" screen) can be queried. This provides the ability to build reports based on information inserted into the field. For example, SWCDs that are writing woodland management plans for the CAUV Program or something similar, might insert in the Description field, work timelines contained in the Forest Management Plan (see below).

For example, let's assume the management plan you're writing requires the following work to be completed:
2007 - TSI Tract 3
2008 - TSI Tract 1
2010 - Thinning Tract 2
2010 - Harvest Tract 4

If you insert this type of information into the Description field for all Forest Management Plans and you do it consistently, you could then run a query based on a certain year when an activity needs to take place. In the above example, by querying for the year "2007", all projects having work scheduled for completion that year would be listed in the query results and the required follow-up and inspection could then be completed. This will not work for years inserted as "2006-2010 - TSI", each individual year must be entered into the box. So "2006-2010 - TSI", would need to be entered as separate entries in the field – e.g. 2006-TSI, 2007-TSI, 2008-TSI, etc. or TSI 2006 2007 2008 2009 2010.

Step 5: Assigning BMPs to the Cooperator Project
Please assign the proper BMPs to the project. These are found on the BMP list that exists in the Cooperator Projects module, on the BMPs/Activities tab.

- To access the BMP list, from the BMPs/Activities screen, click on the "Add" button, then choose "Woodland Management" from the "Activity Type" drop down list. Then choose the appropriate BMPs from the "BMP/Activity Name" drop down list to assign them to the project.

- To spatially capture and record the work being completed by SWCDs, the BMPs that are assigned to a project are "drawn and saved" in the Cooperator Projects module's GIS interface. Drawing and saving the BMPs in the GIS then allows reporting to be done based on the following attributes: SWCD, Township, 11 digit Watershed, 14 digit Watershed, Ohio "House" District, Ohio "Senate" District, Federal "Congressional" district and Municipality.

- Please draw and save all completed BMPs in the GIS

TIMBER HARVEST PLAN (THP) AND TIMBER HARVEST NOTICE OF INTENT (NOI)

Notice of Intents (NOIs) submitted by Landowners, Loggers or Foresters. Every SWCD in Ohio has the potential to receive THPs and/or Timber Harvest NOIs. The following guidance will walk you through the setup of SWIMS to track the THPs and NOIs that your SWCD receives.

- The **THPs** can be tracked by either creating an "individual" Cooperator Project for each THP received or they can be tracked by creating one "Generic" project for THPs. If you want to be able to track staff time spent on individual THPs, then you'll want to create individual Cooperator Projects for each THP received.
- If tracking staff hrs. spent on individual THPs is not an issue, then you can create a "Generic" project to track them.
- **NOIs** typically require minimal staff time; therefore they can be easily tracked by creating one "Generic" project to track them.

A. Timber Harvest Plan (THP) – tracking with "individual" Cooperator Projects.

For each THP submitted to the SWCD, create a separate project in the SWIMS Cooperator Projects module.

Note: As with all Cooperator Projects "Cooperator" name and address information as well as Parcel/Tract information for the "Cooperator" can be captured if you wish. This information is entered in the SWIMS "**Cooperators**" module.

Step 1: Creating/naming the projects in the Cooperator Projects module.
Use of a consistent naming convention will allow for consistent querying results. For example please use the following type of naming convention: **Forestry - Smith - THP**

Step 2: Choosing a "Project Type"
When setting up the project in the Cooperator Projects module, choose **"Woodland"** from the Project Type drop-down list.

Step 3: Choosing a "Program" Type
From the "**Program"** drop-down list, choose the following option: **Timber Harvest**

Step 4: Use of the Cooperator Projects "Description" field
Information inserted in the "Description" field (this field is found on the "Details" screen) can be queried. This provides the ability to build reports based on information inserted into the fieldRefer to page 1 of the submitted THP form and enter the following names and their relationship to the Timber Harvest in the "Comments" field. For example:

- Landowner Name - John Smith
- Logger \ Logging Company Name - James Miller
- Forester \ Consultant Name - Mark Williams
- Name of Submitter - Wade Garrett

Step 5: Assigning BMP to the Project.
The BMPs are found on the list that exists in the Cooperator Projects module, on the BMPs/Activities tab.

- To access the BMP list, from the BMPs/Activities screen, click on the "Add" button, then choose "Woodland Management" from the "Activity Type" drop down list.

- Then choose "THP (Timber Harvest Plan) Review" to assign it to the project.
- To spatially capture and record the work being completed by SWCDs, the BMPs that are assigned to a project are "drawn and saved" in the Cooperator Projects module's GIS interface. Drawing and saving the BMPs in the GIS then allows reporting to be done based on the following attributes: SWCD, Township, 11 digit Watershed, 14 digit Watershed, Ohio "House" District, Ohio "Senate" District, Federal "Congressional" district and Municipality.
- Please draw and save all completed BMPs in the GIS.

B. Timber Harvest Plan (THP) – tracking with "Generic" Cooperator Project.

Note: As with all Cooperator Projects "Cooperator" name and address information as well as Parcel/Tract information for the "Cooperator" can be captured if you wish. This information is entered in the SWIMS "**Cooperators**" module.

Step 1: Creating/naming the project in the Cooperator Project module.

Create a Cooperator Project named – "__________________ Timber Harvest Plans (THPs)
(Your county name)

Step 2: Choosing a "Project Type"
When setting up the project in the Cooperator Projects module, choose **"Woodland"** from the "Project Type" drop-down list.

Step 3: Choosing a "Program" Type
From the "**Program"** drop-down list, choose the following option: **Timber Harvest**

Step 4: Assigning BMPs to the Project.
After creating the "Timber Harvest Plan" Project as indicated above, please assign the appropriate BMP to the project.

- The BMPs are found on the BMP list that exists in the Cooperator Projects module, on the BMPs/Activities tab.To access the BMP list, from the BMPs/Activities screen, click on the "Add" button, then choose "Woodland Management" from the "Activity Type" drop down list.
- Then choose "THP (Timber Harvest Plan) Review" to assign it to the project.
- To spatially capture and record the work being completed by SWCDs, the BMPs that are assigned to a project are "drawn and saved" in the Cooperator Projects module's GIS interface. Drawing and saving the BMPs in the GIS then allows reporting to be done based on the following attributes: SWCD, Township, 11 digit Watershed, 14 digit Watershed, Ohio "House" District, Ohio "Senate" District, Federal "Congressional" district and Municipality
- Please draw and save all completed BMPs in the GIS.

Step 5: BMP "Comments" Field
After you assign/add the "THP (Timber Harvest Plan) Review" BMP to the project, refer to page 1 of the submitted THP (Timber Harvest Plan) Review form and enter the following names and their relationship to the Timber Harvest in the "Comments" field. For example:

- Landowner Name - John Smith

- Logger \ Logging Company Name - James Miller
- Forester \ Consultant Name - Mark Williams
- Name of Submitter - Wade Garrett

Step 6. In the future, every time your SWCD receives a new Timber Harvest Plan (THP), open up the "Timber Harvest Plan (THP)" Project and simply repeat steps 4 and 5.

C. Timber Harvest Notice of Intent (NOI) - tracking with "Generic" Cooperator Project.

Note: As with all Cooperator Projects "Cooperator" name and address information as well as Parcel/Tract information for the "Cooperator" can be captured if you wish. This information is entered in the SWIMS "**Cooperators**" module.

Step 1: Creating/naming the project in the Cooperator Project module.

Create a Cooperator Project named – "___________________ Timber Harvest NOIs".
(Your county name)

Step 2: Choosing a "Project Type"

When setting up the project in the Cooperator Projects module, choose **"Woodland"** from the "Project Type" drop-down list.

Step 3: Choosing a "Program" Type

From the "**Program"** drop-down list, choose the following option: **Timber Harvest**

Step 4: Assigning BMPs to the Project.

- After creating the "Timber Harvest NOI" Project as indicated above, please assign the appropriate BMP to the project.

- The BMPs are found on the BMP list that exists in the Cooperator Projects module, on the BMPs/Activities tab. To access the BMP list, from the BMPs/Activities screen, click on the "Add" button, then choose "Woodland Management" from the "Activity Type" drop down list, then choose NOI (Timber Harvest) Submitted" to assign it to the project.

Step 5. BMP "Comments" Field

After you assign/add the "NOI (Timber Harvest) Submitted" BMP to the project, refer to page 1 of the submitted Timber Harvest NOI form and enter the following names and their relationship to the Timber Harvest in the "Comments" field. For example:

- Landowner Name - John Smith
- Logger \ Logging Company Name - James Miller
- Forester \ Consultant Name - Mark Williams
- Name of Submitter - Wade Garrett

6. In the future, every time your SWCD receives a new Timber Harvest NOI, open up the "Timber Harvest NOI" Project and simply repeat steps 4 and 5.

CHARGING TIME AGAINST FORESTRY PROJECTS - ADDITIONAL INFO

Once Forestry projects are set-up as Cooperator projects, hours can be charged against them. By using the "Comment" field on the Timesheet you can describe the activity or activities that the hours charged against the project represents. Remember, since the Timesheet Comments field is queriable, you can very easily run a query to obtain hours spent doing specific activities for individual Forestry projects or for all Forestry projects. <u>This does require the consistent use of consistent verbiage to describe those activities.</u> This can be easily accomplished by creating a list of activities using the "Timesheet Comments" feature in the Timesheet. A sample list might look like the following:

- Forestry – Logging Complaint Investigation
- Forestry – Mapping
- Forestry – Inventory and Evaluation, aka I & E

Then it's just a matter of staff selecting the appropriate comment for insertion in the "Comment" field. Queries could then be run to show time spent on those particular Forestry activities.

COMMUNICATION NOTES

While working with a particular individual, you have the ability to capture the date and notes for a particular visit or phone call with a landowner/client by using the <u>**Communication Note**</u> feature found in SWIMS. This is a good way to document follow up visits or occasions where additional information/contact was given to the client such as timelines for practice completion.

GUIDANCE FOR SET-UP OF WILDLIFE SPECIALIST/WILDLIFE RELATED PROJECTS IN THE SWIMS PROGRAM

SWIMS Help Sheet

This document will provide guidance to SWCDs on how to set-up the SWIMS program so that Wildlife Specialist Assistance provided by SWCDs can be captured for reporting to local entities/sponsors, the ODNR-DOW and for Statewide reports.

LAND AND WATER PROJECTS

In order to make Wildlife Damage or Wildlife Habitat work/projects conducted with SWCD assistance reportable, SWCDs should create in SWIMS a separate Land Water (L & W) project for each Project they're involved with. This would apply to Wildlife Damage or Wildlife Habitat Assistance through both Farm Bill Programs and Local programs as well.

Important Note: As with all L&W projects, both the Client name and address information as well as Parcel/Tract information for the client (entered in the Client module, on the "Location" tab) **must** be completed before you can create L&W projects.

Project Set-up

Step 1: Creating/naming the projects in the L&W module.

Use of a consistent naming convention will allow for consistent reporting results. For example please use the following type of naming convention:

- Wildlife Damage – Jim Jones
- Wildlife Habitat – Weston Food Plot
- Wildlife Nuisance – Guernsey County Calls

Putting "Wildlife" in the front of each L&W project name, will allow querying to be done on all projects that contain "Wildlife" in the project name. This will also group all "Wildlife" projects together on your L&W projects list.

Once the Wildlife related project is created in the L&W module, time can then be charged by staff against each individual project. Summary reports and queries are then available for each project showing individual employee or entire staff time spent on project.

Step 2: Choosing a Project "Category"

When setting up the project in the L&W module, from the project "**Category**" list choose **Wildlife Management.**

Step 3: Choosing a "Program" Type

From the "**Program"** type list, choose one of the following which best describes the project:

- Wildlife Damage Complaint
- Farm Bill Program funding (CREP, CRP, WHIP, etc…)
- SWCD Program or another type that fits the project

Step 4: Assigning BMPs to the Project.
To spatially capture and record the work being completed by SWCDs, the BMPs that are assigned to a L&W project are "drawn and saved" in the L&W module's GIS interface. Drawing and saving the BMPs in the GIS then allows reporting to be done by: SWCD, Township, 11 digit watershed, 14 digit watershed, State "House and Senate" districts, Federal Congressional district and Municipality. The BMPs you will assign to Wildlife projects will be used to: 1) delineate the acres in the practice planned, the length (ft.) of the planned practice, or the instances of occurrence depending on the BMP selected and 2) indicate the type (species) of wildlife damage occurring for Wildlife Damage Complaints.

Please assign the proper BMPs to each Wildlife project. These are found on the L&W BMP list that exists in the L&W module: To access the list, click on the "Add BMP" button, then choose the following BMPs:

A. <u>For Wildlife Damage Complaints:</u>

- All individual Projects should have a BMP added to locate and define the primary animal causing the damage. From the BMP list choose the appropriate species causing the damage and assign it to the project.
- When you go into the SWIMS GIS to draw and save this BMP, simply locate the field where the damage is occurring on the aerial and mark it with a point. (You do not need to draw the outline of the entire field; a point will be used to indicate the location.)

B. <u>For Wildlife Habitat Assistance:</u>

- All individual Projects should have a BMP added to locate and define the BMP being installed in this project. From the BMP list choose the appropriate BMP(s) and assign it/them to the project.
- For each BMP that you assign/add to the Wildlife Habitat project, click on them with your mouse/cursor, then click on "Edit BMP" button, when the "Edit BMP' box appears on the screen, enter the total acres/feet in the "Practice Measurement" field. Then click the "OK" button to save.
- When you go into the SWIMS GIS to draw and save the BMP(s), simply locate on the aerial where the practice to be installed is located and draw the shape (shape to be drawn is predetermined by the BMP chosen). BMPs quantified by acres are drawn as a polygon, BMPs quantified by feet are drawn as lines, and BMPs quantified as instances are drawn as points)

C. <u>For Wildlife Nuisance Calls</u>
In order to capture time spent on and numbers of, Nuisance Wildlife Calls, please use the format listed below in order to have consistency statewide.

- You will need to setup a "generic" client called "_________ County", if someone in your office has not already done so. Plus, you will also need to enter a generic parcel/tract for this client. **(Please note: client and parcel/tract number is only required if you plan to use the "Conservation 6 Note" feature in SWIMS)**
- Every Wildlife Specialist should create a project named "(<u>County Name</u>) Nuisance Calls" This will create a way for you to charge time for all of those calls that are one-time contacts, where assistance is <u>usually</u> given over the phone. This also gives you the ability to track the number of

calls you receive, and map them in the GIS if you choose. The generic client you have created will be linked with this project.

- If you choose to map these calls, you will add a BMP called "Nuisance Animal Complaint" to the project each time you receive a call. Each one is then mapped as an individual BMP.
- If you choose to simply keep track of the number of these calls, after you have added the BMP, "Nuisance Animal Complaint", you can edit the BMP and change the number of calls in the box marked "instances", updating it every time you get this type of call.

CHARGING TIME AGAINST WILDLIFE PROJECTS - ADDITIONAL INFO

Once Wildlife projects are set-up as L&W projects, you then have the ability to charge time against them. By using the comment box on the Timesheet you can describe the activity or activities the hours charged against the project represents.

Remember, since the Timesheet "Comments" box comments are able to be queried, you can very easily run a query to obtain hours spent doing specific activities for individual Wildlife projects. <u>This does require the consistent use of consistent verbiage to describe those activities.</u> This can be easily accomplished by creating a list of activities that can then be cut and pasted by SWCD staff into the Timesheet comment box. A sample list might look like the following:

- Wildlife – Survey
- Wildlife – Design
- Wildlife – Planning
- Wildlife – Damage
- Wildlife – Nuisance

As long as you consistently cut and paste the activities into the comment box, you can run a query to show time spent on that particular activity.

CONSERVATION 6 NOTES

Conservation 6 notes are accessible either through the Client or L&W module. The 6 notes allow you to capture the date and notes for a particular visit or phone call with a landowner/client. This is a good way to document follow up visits or occasions where additional information/contact was given to the person, especially for follow up on deer damage permits, collection, and receipt.

DRAINAGE PROJECT SET-UP GUIDANCE IN SWIMS PROGRAM

SWIMS Help Sheet

For SB 160, ORC 6131, Mutual Agreements and Ditch Maintenance by SWCDs

The goal of this document is to provide guidance to SWCDs on how to set-up the SWIMS program so that Drainage Assistance provided by SWCD's can be captured for reporting to local entities/sponsors and for statewide reports as well.

LAND AND WATER PROJECTS

In order to make drainage work/projects conducted with SWCD assistance reportable, SWCDs should create in SWIMS a separate Land and Water (L & W) project for each Drainage Project they're involved with. This would include new projects as well as Ditch/Tile that are on "Maintenance" (through the District).

Project Set-Up

Step 1: Creating/naming the projects in the L&W module.

Use of a consistent naming convention will allow for consistent reporting results. For example please use the following type of naming convention:

- Drainage – Jones Ditch;
- Drainage – Weston Ditch;
- Drainage – Smith Tile Main, etc.

Putting "Drainage" in the front of each L&W project name, will allow querying to be done on all projects that contain "Drainage" in the project name. This will also group all "drainage" projects together on your L&W projects list.

Once the drainage project is created in the L&W module, time can then be charged by staff against each individual project. Summary reports and queries are then available for each project showing individual employee or entire staff time spent on a project.

Step 2: Choosing a Project "Category"

When setting up the project in the L&W module, choose from the project "Category" list, one of the following:

- Drainage – Design & Construction
- Drainage – Maintenance

For SWCDs that operate a "Ditch Maintenance Program", when a project is completed and is ready to go on "Maintenance" you can change the Project "Category" from "Drainage - Design & Construction" to "Drainage – Maintenance".

Step 3: Choosing a "Program" Type

From the "**Program"** type list, choose one of the following::

- Drainage – ORC 1515-CWI

- Drainage – ORC 6131
- Drainage – Mutual Group

Step 4: Assigning BMPs to the Project.
To spatially capture and record the work being completed by SWCDs, the BMPs that are assigned to a L&W project are "drawn and saved" in the L&W module's GIS interface. Drawing and saving the BMPs in the GIS then allows reporting to be done by: SWCD, Township, 11 digit watershed, 14 digit watershed, State "House and Senate" districts, Federal Congressional district and Municipality. The BMPs you will assign to Drainage projects will be used to: 1) delineate the acres in the drainage area and 2) indicate the construction type of the ditch.

Please assign the following BMPs to each Drainage project. These are found on the L&W BMP list that exists in the L&W module. To access the list, click on the "Add BMP" button, then choose from the following BMPs:

- <u>Drainage – Acres in Drainage Area (this BMP should be assigned to all drainage projects)</u>
  - After adding this BMP to the drainage project, click on it with your mouse/cursor, then click on "Edit BMP" button, when the "Edit BMP' box appears on the screen, enter the total acres of the Drainage Area in the "Practice Measurement" field. Then click the "OK" button to save.
  - When you go into the SWIMS GIS to draw and save this BMP, simply locate the mouth of the watershed or drainage area on the aerial and mark it with a small polygon. (You do not need to draw the outline of the entire watershed).

- <u>Type of Construction (assign as many of the following to the project that apply)</u>
  - Drainage – 2 Stage
  - Drainage – Natural Channel
  - Drainage – One-Sided Construction
  - Drainage – Over-wide Channel
  - Drainage – Snag & Clear
  - Drainage – Tile Main
  - Drainage – Two Sided Construction

For each BMP that you assign/add to the drainage project, click on them with your mouse/cursor, then click on "Edit BMP" button, when the "Edit BMP' box appears on the screen, enter the total length/feet in the "Practice Measurement" field. Then click the "OK" button to save.

When you go into the SWIMS GIS to draw and save the/these BMP(s), simply draw a line on the aerial indicating the physical location/drainage course of the BMP.

Charging Time To Drainage Projects

Once drainage projects are set-up as L&W projects, you then have the ability to charge time against them. By using the comment box on the Timesheet you can describe the activity or activities that the hours charged against the project represents. Since the Timesheet "Comments" box is queriable, you can very easily run a query to obtain hours spent doing those activities for individual drainage projects. <u>This does require the</u>

consistent use of consistent verbiage to describe those activities. This can be easily accomplished by creating a list of activities that can then be cut and pasted by SWCD staff into the Timesheet comment box. As long all staff consistently cut and paste the activities into the comment box, you can run a query to show time spent on that particular activity. A sample list might look like the following:

- Drainage – Group Meetings
- Drainage – Public Hearings
- Drainage – Surveying
- Drainage – Design
- Drainage – Construction
- Drainage – Inspections
- Drainage – Administration

SWIMS QUERY BUILDER MODULE
"HELP SHEET"

SWIMS
Help
Sheet

GETTING STARTED

Following is basic information/guidance to help you get started using the SWIMS Query Builder module.

When you open the Query Builder module, the first screen displayed is the "Query Builder Main" screen. It allows you to run an existing query or start a new query. Copies of queries that have been saved will be displayed as "Favorites" on this screen.

The buttons on the toolbar, located on the left side of the screen, will tell you what function they perform by holding the cursor over the buttons. See explanation below.

- The Green and white button or **EXECUTE** button allows you to run/execute a saved query. Simply click on a query you want to run and then click on the Execute button. The query results are displayed on the right side of the screen.
- The orange globe **VIEW MAP** button will show a map of a saved query if the query contains "mapped" (spatial) fields/attributes.
- The yellow paper **NEW QUERY** button, allows you start/create a new query.
- The pink gear box **MANAGE QUERIES** button allows you to manage existing/saved queries, or create a new one.

Most of the time you will be selecting the:

- **NEW QUERY** button, when you click it, it opens the "Query Editor" screen where you can start/create a new query); **or the**
- **MANAGE QUERIES** button; gives you access to your "Master Query List". When you click this button, the right side of the screen will re-configure. It will then display a "second" toolbar with buttons. Also displayed will be a list of any queries previously saved. This is your "Master" list of queries.

The buttons on the toolbar perform different functions:

- The **NEW QUERY** button, allows you start/create a new query.
- The **EDIT QUERY** button, allows you to change an existing query. Simply select/click on a query in the Master list, then hit the Edit Query button. The selected query will then open, allowing you to edit/change the query.

STARTING/BUILDING A QUERY

Once you have decided to start a new query, hit the **NEW QUERY** button, the screen will re-configure, you will then be setting at the "Query Editor" screen. This screen will allow you to choose fields of data for your query.

Step One - CURRENT INFO TYPE

On the left side of the screen you will see the "Current Info Type" heading. Beneath it will be a drop down box, which contains the different SWIMS information types that you can query. By default, "Land and Water Projects" will be the displayed info type. Beneath the drop down box will be a list of all the different fields (attributes) associated with Land and Water Projects that you may query.

NOTE: Queries can only be built within the chosen Info Type, you cannot query "across" other info types. Changing the info type will result in erasing any of the attributes that you have selected. When you change an info type, SWIMS will display a warning box asking you if you want to proceed. Selecting 'Yes" will allow you to choose a different info type, selecting No, will keep you at the current info type.

Step Two - CHOOSING ATTRIBUTES

Once your desired info type is selected, you then select the attributes to be displayed in the query results. To do this, simply click on, drag and then drop the attributes into the **RESULTS COLUMN** box**.**

Helpful Hint: You know the attribute has been successfully dropped into the Results Column box as soon as the border around the Results Column box is highlighted with a thick black border. At this time you can release the mouse control.

You may drag as many of the attributes into the Results Column box as you like. The order, in which they are displayed in the box, is the same order the data will be displayed in the query results. So if you want data to be displayed in a certain order in your query results, simply arrange the attributes in the box in that same order.

When you have finished selecting all the attributes for your query, you may then want to select how the query results data is sorted (e.g. sort by last name). To do this, simply select from the attribute list on the left side of the screen, the attribute(s) you want to use to sort with. Click on, drag and drop them into the **SORT ORDER** box.

Important Note: You must select the attribute(s) to be used for sorting from the attribute list on the left side of the screen, not from the Results Column box above. Once the attribute has been dropped in the Sort Order box you may then click the attribute to change A-Z to Z-A if needed. You may use multiple attributes to sort with if needed. The data results will be sorted (left to right) by the first attribute, then the second, and so on.

Step Three – SETTING A FILTER

Depending on the query you are building, you may also need to set a filter. To do so, select from the attribute list on the left side of the screen, the attribute you wish for filtering. Click on, then drag and drop the attribute into the long, narrow, gray box located under the **FILTER CRITERIA** heading.

Helpful Hint: You may drop and release the attribute as soon as the gray box turns "yellow". After the attribute is dropped in the box, additional data choices (dates, texts, categories, etc.) can be used to further refine the query results.

Important Note: Please keep in mind that in order to build a query, you only need to populate the **RESULTS COLUMN** box**.** The SORT ORDER and FILTER CRITERIA boxes only need to be populated when a specific type of result is desired.

Step Four – RUNNING A QUERY / EXPORTING RESULTS

After all the needed attributes are placed in the boxes, simply hit the **EXECUTE** button and the query results will be displayed in a new screen. If you want to change something in the query, close the results screen by clicking on the "X" in the upper right hand corner. You will be returned to the "Query Editor" screen. Then change/edit the query and re-run.

Once the query results contain the data you want, the results can be "Exported" if desired. To do this click on the **EXPORT** button located on the upper right hand corner of the query results screen. The query results are then exported to an MS Excel spreadsheet document.

Step Five – SAVING A QUERY

You may want to save some of the queries you build so they can be used/viewed in the future. To save a query after it has been created, enter a name for the query in the "Query Title" box at the top of the Query Editor screen. You must also enter a description for the query in the "Description" box.

Important Note: Both the "Query Title" and "Description" boxes must be populated in order to save a query.

Once information is entered in both boxes, click the "Save" button on the toolbar at the top of the Query Editor screen. After the **SAVE** button is pressed, a copy of the query is saved in your Master query list and in Favorites list. Both of these lists are found on the Query Builder Main (first) screen of the module.