

OPERATIONS AND MAINTENANCE BUSINESS INFORMATION LINK - mikemdo@ombilt

Action Edit Query Record Field Help Window

PARTNERSHIP AGREEMENTS

Agreement Type: ALL TYPES Organization: ALL ORGANIZATIONS Organization Type: ALL TYPES

Show Selected Create New Annual Data

Project Site: BARDWELL LAKE

Organization	Agreement Code	Agreement Type	Business Line	Date Effective	Description	Terminated	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	COP	COOPERATING ASSOCIATION	REC	14-MAR-2003	TETRA will will develope, operate and ma	<input type="checkbox"/>	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	MOA	MEMORANDUM OF UNDERSTANDING	REC	01-OCT-2004	Horse Trail Maintenance, Installation1188	<input type="checkbox"/>	View/Edit
Wal-Mart	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Test of System	<input checked="" type="checkbox"/>	View/Edit
U.S. FISH & WILDLIFE SERVICE	ECA	ECONOMY ACT PARTNERSHIP	REC	31-AUG-2010	test of System	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	HCP	HANDSHAKE PARTNERSHIP	REC	31-AUG-2010	Test of Sysyem	<input type="checkbox"/>	View/Edit
Trail Dogs	CCS	CHALLENGE PARTNERSHIP	REC	31-AUG-2010	Build Fitness trail	<input type="checkbox"/>	View/Edit
First Baptist Church	MOA	MEMORANDUM OF UNDERSTANDING	REC	31-AUG-2010	Maintain Fitness trail	<input type="checkbox"/>	View/Edit
Cabellas	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Water Safety Supplies	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	CNT	CONTRIBUTIONS PROGRAM	ES	18-JUL-2011	test for es	<input type="checkbox"/>	View/Edit
GIRL SCOUTS OF AMERICA	COA	COOPERATIVE AGREEMENT	REC	01-APR-2011	Test	<input type="checkbox"/>	View/Edit

This opening screen displays all agreements listed in OMBIL for the Project Site (PS), including both ES and Recreation agreements. Under ES, you can view the Recreation agreements, but cannot edit them. You must access them through the Recreation business function and update process. If you click on the View/Edit button for a Recreation agreement.....

Display of the status of the agreement, checked if terminated.

Record: 10/17 ... <OSC>

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PARTNERSHIP AGREEMENTS

Agreement Type: ALL TYPES Organization: ALL ORGANIZATIONS Organization Type: ALL TYPES

Show Selected Create New Annual Data

Project Site: BARDWELL LAKE

Organization	Agreement Code	Agreement Type	Business Line	Date Effective	Description	Terminated	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	COP	COOPERATING ASSOCIATION	REC	14-MAR-2003	TETRA will will develop, operate and ma	<input type="checkbox"/>	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	MOA	MEMORANDUM OF UNDERSTANDING	REC	01-OCT-2004	Horse Trail Maintenance, Installation188	<input type="checkbox"/>	View/Edit
Wal-Mart	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Test of System	<input checked="" type="checkbox"/>	View/Edit
U.S. FISH & WILDLIFE SERVICE	ECA	ECONOMY ACT PARTNERSHIP	REC	31-AUG-2010	test of System	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	HCP	HANDSHAKE PARTNERSHIP	REC	31-AUG-2010	Test of Sysytem	<input type="checkbox"/>	View/Edit
Trail Dogs	CCS	CHALLENGE PARTNERSHIP	REC	31-AUG-2010	Build Fitness trail	<input type="checkbox"/>	View/Edit
First Baptist Church	MOA	MEMORANDUM OF UNDERSTANDING	REC			<input type="checkbox"/>	View/Edit
Cabellas	CNT	CONTRIBUTIONS PROGRAM	REC			<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	CNT	CONTRIBUTIONS PROGRAM	REC			<input type="checkbox"/>	View/Edit
GIRL SCOUTS OF AMERICA	COA	COOPERATIVE AGREEMENT	REC			<input type="checkbox"/>	View/Edit

Cannot Change Partnership

 This record is not editable because it is a(n) REC agreement. Please go to the REC business function to edit this record.

OK

A System Warning will inform you that the record is not editable and you must go to the Recreation Business function in order to make changes to that record. Just Click OK.

Display of the status of the agreement, checked if terminated.

Record: 10/17

<OSC>

OPERATIONS AND MAINTENANCE BUSINESS INFORMATION LINK - mikemdo@ombilt

Action Edit Query Record Field Help Window

PARTNERSHIP AGREEMENTS

Agreement Type: ALL TYPES Organization: ALL ORGANIZATIONS Organization Type: ALL TYPES

Show Selected Create New Annual Data

Project Site: BARDWELL LAKE

Organization	Agreement Code	Agreement Type	Business Line	Date Effective	Description	Terminated	
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	COP	COOPERATING ASSOCIATION	REC	14-MAR-2003	TETRA will will develope, operate and ma	<input type="checkbox"/>	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	MOA	MEMORANDUM OF UNDERSTANDING	REC	01-OCT-2004	Horse Trail Maintenance, Installation1188	<input type="checkbox"/>	View/Edit
Wal-Mart	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Test of System	<input checked="" type="checkbox"/>	View/Edit
U.S. FISH & WILDLIFE SERVICE	ECA	ECONOMY ACT PARTNERSHIP	REC	31-AUG-2010	test of System	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	HCP	HANDSHAKE PARTNERSHIP	REC	31-AUG-2010	Test of Sysytem	<input type="checkbox"/>	View/Edit
Trail Dogs	CCS	CHALLENGE PARTNERSHIP	REC	31-AUG-2010	Build Fitness trail	<input type="checkbox"/>	View/Edit
First Baptist Church	MOA	MEMORANDUM OF UNDERSTANDING	REC	31-AUG-2010	Maintain Fitness trail	<input type="checkbox"/>	View/Edit
Cabellas	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Water Safety Supplies	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	CNT	CONTRIBUTIONS PROGRAM	ES	18-JUL-2011	test for es	<input type="checkbox"/>	View/Edit
GIRL SCOUTS OF AMERICA	COA	COOPERATIVE AGREEMENT	REC	01-APR-2011	Test	<input type="checkbox"/>	View/Edit



10 records may be displayed at a time. If you have more than 10 agreements use the scroll bar on the right to view the remainder of the agreements.

Action Edit Query Record Field Help Window

PARTNERSHIP AGREEMENTS

Agreement Type: ALL TYPES Organization: ALL ORGANIZATIONS Organization Type: ALL TYPES

Show Selected Create New Annual Data

Project Site: BARDWELL LAKE

Organization	Agreement Code	Agreement Type	Business Line	Date Effective	Description	Terminated	View/Edit
Cabellas	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Water Safety Supplies	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	CNT	CONTRIBUTIONS PROGRAM	ES	18-JUL-2011	test for es	<input type="checkbox"/>	View/Edit
GIRL SCOUTS OF AMERICA	COA	COOPERATIVE AGREEMENT	REC	01-APR-2011	Test	<input type="checkbox"/>	View/Edit
QUAD CITY CVB	COP	COOPERATING ASSOCIATION	ES	07-JUN-2011	ES - Test 2	<input type="checkbox"/>	View/Edit
Cabellas	COA	COOPERATIVE AGREEMENT	ES	07-APR-2012	ES Test 3	<input type="checkbox"/>	View/Edit
Longfellow Middle School	MOA	MEMORANDUM OF UNDERSTANDIN	ES	07-FEB-2012	ES Test 4	<input type="checkbox"/>	View/Edit
Environmental Protection Agency	ECA	ECONOMY ACT PARTNERSHIP	ES	07-JUN-2008	ES Test 5	<input type="checkbox"/>	View/Edit
Bee County	HCP	HANDSHAKE PARTNERSHIP	ES	19-MAR-2009	ES Test 6	<input type="checkbox"/>	View/Edit
American Chestnut Foundation	CCS	CHALLENGE PARTNERSHIP	ES	01-MAY-2012	ES Test 7	<input type="checkbox"/>	View/Edit
Wal Mart	CNT	CONTRIBUTIONS PROGRAM	ES	01-MAY-2009	ES Test 8	<input type="checkbox"/>	View/Edit



After you scroll down, you can see the remainder of the agreements.

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Action Edit Query Record Field Help Window

PARTNERSHIP AGREEMENTS

Agreement Type: ALL TYPES
Organization: ALL ORGANIZATIONS
Organization Type: ALL TYPES

Show Selected Create New Annual Data

Project Site: BARDWELL LAKE

Organization	Agreement Code	Agreement Type	Business Line	Date Effective	Description	Terminated	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	COP	COOPERATING ASSOCIATION	REC	14-MAR-2003	TETRA will will develop, operate and ma	<input type="checkbox"/>	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	MOA	MEMORANDUM OF UNDERSTANDIN	REC	01-OCT-2004	Horse Trail Maintenance, Installation1188	<input type="checkbox"/>	View/Edit
Wal-Mart	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Test of System	<input checked="" type="checkbox"/>	View/Edit
U.S. FISH & WILDLIFE SERVICE	ECA	ECONOMY ACT PARTNERSHIP	REC	31-AUG-2010	test of System	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	HCP	HANDSHAKE PARTNERSHIP	REC	31-AUG-2010	Test of Sysytem	<input type="checkbox"/>	View/Edit
Trail Dogs	CCS	CHALLENGE PARTNERSHIP	REC	31-AUG-2010	Build Fitness trail	<input type="checkbox"/>	View/Edit
First Baptist Church	MOA	MEMORANDUM OF UNDERSTANDIN	REC	31-AUG-2010	Maintain Fitness trail	<input type="checkbox"/>	View/Edit
Cabellas	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Water Safety Supplies	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	CNT	CONTRIBUTIONS PROGRAM	ES	18-JUL-2011	test for es	<input type="checkbox"/>	View/Edit
GIRL SCOUTS OF AMERICA	COA	COOPERATIVE AGREEMENT	REC	01-APR-2011	Test	<input type="checkbox"/>	View/Edit

Limit the agreements shown on the screen by using the **filters** at the top of the screen. Simply select an Agreement Type, an Organization (Name), or an Organization Type. After a filter is selected, click on the “Show Selected” button and the screen will refresh with only show those agreements the user selected. If there are known agreements that do not appear, the user must click on the “Create New” button and work through the screens to create a new agreement. If no new agreements need to be created, then click on the “Annual Data” button to start the update process or the “View/Edit” button to review and/or update basic partnership information.



PARTNERSHIP AGREEMENTS

Agreement Type Organization Organization Type

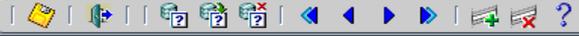
ALL TYPES
 CCS - CHALLENGE PARTNERSHIP
 CNT - CONTRIBUTIONS PROGRAM
 COA - COOPERATIVE AGREEMENT
 COP - COOPERATING ASSOCIATION
 ECA - ECONOMY ACT PARTNERSHIP
 HCP - HANDSHAKE PARTNERSHIP

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Annual Data

Organization	Agreement Code	Agreement Type	Business Line	Date Effective	Description	Terminated	
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	COP	COOPERATING ASSOCIATION	REC	14-MAR-2003	TETRA will will develop, operate and ma	<input type="checkbox"/>	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	MOA	MEMORANDUM OF UNDERSTANDING	REC	01-OCT-2004	Horse Trail Maintenance, Installation1188	<input type="checkbox"/>	View/Edit
Wal-Mart	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Test of System	<input checked="" type="checkbox"/>	View/Edit
U.S. FISH & WILDLIFE SERVICE	ECA	ECONOMY ACT PARTNERSHIP	REC	31-AUG-2010	test of System	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	HCP	HANDSHAKE PARTNERSHIP	REC	31-AUG-2010	Test of Sysytem	<input type="checkbox"/>	View/Edit
Trail Dogs	CCS	CHALLENGE PARTNERSHIP	REC	31-AUG-2010	Build Fitness trail	<input type="checkbox"/>	View/Edit
First Baptist Church	MOA	MEMORANDUM OF UNDERSTANDING	REC	31-AUG-2010	Maintain Fitness trail	<input type="checkbox"/>	View/Edit
Cabellas	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Water Safety Supplies	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	CNT	CONTRIBUTIONS PROGRAM	ES	18-JUL-2011	test for es	<input type="checkbox"/>	View/Edit
GIRL SCOUTS OF AMERICA	COA	COOPERATIVE AGREEMENT	REC	01-APR-2011	Test	<input type="checkbox"/>	View/Edit

In this example, we have selected Cooperating Association as a filter so that only those type agreements will be displayed.



PARTNERSHIP AGREEMENTS

Agreement Type: ALL TYPES

Organization:

- First Baptist Church
- GIRL SCOUTS OF AMERICA
- Longfellow Middle School
- QUAD CITY CVB
- TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION**
- Trail Dogs
- U.S. FISH & WILDLIFE SERVICE
- Wal Mart

Organization Type: ALL TYPES

Project Site: BARDWELL LAKE

Show Selected (indicated by a red arrow)

Create New

Organization	Code	Type	Line	Effective	Description	Terminated	
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	COP	COOPERATING ASSOCIATION	REC	14-MAR-2003	TETRA will will develop, operate and ma	<input type="checkbox"/>	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	MOA	MEMORANDUM OF UNDERSTANDIN	REC	01-OCT-2004	Horse Trail Maintenance, Installation1188	<input type="checkbox"/>	View/Edit
Wal-Mart	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Test of System	<input checked="" type="checkbox"/>	View/Edit
U.S. FISH & WILDLIFE SERVICE	ECA	ECONOMY ACT PARTNERSHIP	REC	31-AUG-2010	test of System	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	HCP	HANDSHAKE PARTNERSHIP	REC	31-AUG-2010	Test of Sysytem	<input type="checkbox"/>	View/Edit
Trail Dogs	CCS	CHALLENGE PARTNERSHIP	REC	31-AUG-2010	Build Fitness trail	<input type="checkbox"/>	View/Edit
First Baptist Church	MOA	MEMORANDUM OF UNDERSTANDIN	REC	31-AUG-2010	Maintain Fitness trail	<input type="checkbox"/>	View/Edit
Cabellas	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Water Safety Supplies	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	CNT	CONTRIBUTIONS PROGRAM	ES	18-JUL-2011	test for es	<input type="checkbox"/>	View/Edit
GIRL SCOUTS OF AMERICA	COA	COOPERATIVE AGREEMENT	REC	01-APR-2011	Test	<input type="checkbox"/>	View/Edit

In this example, we have re-set the Agreement Type to “All Types” and are now filtering on the Organization Name “Texas Equestrian Trail Riders Association” This will limit the display to specific organizations. Click “Show Selected”.

OPERATIONS AND MAINTENANCE BUSINESS INFORMATION LINK - mikemdo@ombilt

Action Edit Query Record Field Help Window

PARTNERSHIP AGREEMENTS

Agreement Type: ALL TYPES Organization: TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION Organization Type: ALL TYPES

Show Selected Create New Annual Data

Project Site: BARDWELL LAKE

Organization	Agreement Code	Agreement Type	Business Line	Date Effective	Description	Terminated	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	COP	COOPERATING ASSOCIATION	REC	14-MAR-2003	TETRA will will develope, operate and ma	<input type="checkbox"/>	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	MOA	MEMORANDUM OF UNDERSTANDING	REC	01-OCT-2004	Horse Trail Maintenance, Installation1188	<input type="checkbox"/>	View/Edit
						<input type="checkbox"/>	View/Edit
						<input type="checkbox"/>	View/Edit
						<input type="checkbox"/>	View/Edit
						<input type="checkbox"/>	View/Edit
						<input type="checkbox"/>	View/Edit
						<input type="checkbox"/>	View/Edit
						<input type="checkbox"/>	View/Edit
						<input type="checkbox"/>	View/Edit

As you can see, by filtering on the Organization Name, the display shows all agreements for that organization, regardless of the type of agreement.

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Action Edit Query Record Field Help Window

PARTNERSHIP AGREEMENTS

Agreement Type: ALL TYPES
 Organization: ALL ORGANIZATIONS
 Organization Type: ALL TYPES

Show Selected Create New Annual Data

Project Site: BARDWELL LAKE

Organization Type List:

- ALL TYPES
- LOC - LOCAL GOVERNMENTAL AGENCY
- CON - BUSINESS (CONCESSIONAIRE, COMPANY, SOLE PROPRIETORSHIP)
- EDU - EDUCATIONAL INSTITUTIONS (SCHOOLS, UNIVERSITIES)
- OTH - OTHER
- MIL - MILITARY ORGANIZATION
- NPO - NONPROFIT, QUASI PUBLIC, OR COMMUNITY ORGANIZATION**
- FED - FEDERAL AGENCY (OTHER THAN CORPS AND MILITARY)

Organization	Code	Agreement Type	Bus. Line	Effective	Description	Terminated	
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	COP	COOPERATING ASSOCIATION	REC	14-MAR-2003	TETRA will will develop, operate and ma	<input type="checkbox"/>	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	MOA	MEMORANDUM OF UNDERSTANDING	REC	01-OCT-2004	Horse Trail Maintenance, Installation1188	<input type="checkbox"/>	View/Edit
Wal-Mart	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Test of System	<input checked="" type="checkbox"/>	View/Edit
U.S. FISH & WILDLIFE SERVICE	ECA	ECONOMY ACT PARTNERSHIP	REC	31-AUG-2010	test of System	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	HCP	HANDSHAKE PARTNERSHIP	REC	31-AUG-2010	Test of Sysytem	<input type="checkbox"/>	View/Edit
Trail Dogs	CCS	CHALLENGE PARTNERSHIP	REC	31-AUG-2010	Build Fitness trail	<input type="checkbox"/>	View/Edit
First Baptist Church	MOA	MEMORANDUM OF UNDERSTANDING	REC	31-AUG-2010	Maintain Fitness trail	<input type="checkbox"/>	View/Edit
Cabellas	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Water Safety Supplies	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	CNT	CONTRIBUTIONS PROGRAM	ES	18-JUL-2011	test for es	<input type="checkbox"/>	View/Edit
GIRL SCOUTS OF AMERICA	COA	COOPERATIVE AGREEMENT	REC	01-APR-2011	Test	<input type="checkbox"/>	View/Edit

In this example, we have re-set the Agreement Type to “All Types” , the Organization To “All Organizations” and are now filtering on Type of Organization “NonProfit.” This will limit the display to a specific Type of Organization. Click “Show Selected”.

Display of the status of the agreement, checked if terminated.

Record: 1/?

<OSC>

OPERATIONS AND MAINTENANCE BUSINESS INFORMATION LINK - mikemdo@ombilt

Action Edit Query Record Field Help Window

PARTNERSHIP AGREEMENTS

Agreement Type: ALL TYPES Organization: ALL ORGANIZATIONS Organization Type: NPO - NONPROFIT, QUASI PUBLIC, OR COMMUNITY ...

Show Selected Create New Annual Data

Project Site: BARDWELL LAKE

Organization	Agreement Code	Agreement Type	Business Line	Date Effective	Description	Terminated	View/Edit
BOY SCOUTS OF AMERICA	HCP	HANDSHAKE PARTNERSHIP	REC	31-AUG-2010	Test of Sysytem	<input type="checkbox"/>	View/Edit
First Baptist Church	MOA	MEMORANDUM OF UNDERSTANDING	REC	31-AUG-2010	Maintain Fitness trail	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	CNT	CONTRIBUTIONS PROGRAM	ES	18-JUL-2011	test for es	<input type="checkbox"/>	View/Edit
GIRL SCOUTS OF AMERICA	COA	COOPERATIVE AGREEMENT	REC	01-APR-2011	Test	<input type="checkbox"/>	View/Edit
American Chestnut Foundation	CCS	CHALLENGE PARTNERSHIP	ES	01-MAY-2012	ES Test 7	<input type="checkbox"/>	View/Edit
						<input type="checkbox"/>	View/Edit
						<input type="checkbox"/>	View/Edit
						<input type="checkbox"/>	View/Edit
						<input type="checkbox"/>	View/Edit
						<input type="checkbox"/>	View/Edit

By filtering on Non Profit, the list shows those non profit groups that have agreements at the project site (regardless of Business line). In order to proceed with the update process, we will re-set the screen one more time to display all agreements.

Action Edit Query Record Field Help Window

PARTNERSHIP AGREEMENTS

Agreement Type: ALL TYPES Organization: ALL ORGANIZATIONS Organization Type: ALL TYPES

Show Selected Create New Annual Data

Project Site: BARDWELL LAKE

Organization	Agreement Code	Agreement Type	Business Line	Date Effective	Description	Terminated	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	COP	COOPERATING ASSOCIATION	REC	14-MAR-2003	TETRA will will develop, operate and ma	<input type="checkbox"/>	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	MOA	MEMORANDUM OF UNDERSTANDING	REC	01-OCT-2004	Horse Trail Maintenance, Installation1188	<input type="checkbox"/>	View/Edit
Wal-Mart	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Test of System	<input checked="" type="checkbox"/>	View/Edit
U.S. FISH & WILDLIFE SERVICE	ECA	ECONOMY ACT PARTNERSHIP	REC	31-AUG-2010	test of System	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	HCP	HANDSHAKE PARTNERSHIP	REC	31-AUG-2010	Test of Sysytem	<input type="checkbox"/>	View/Edit
Trail Dogs	CCS	CHALLENGE PARTNERSHIP	REC	31-AUG-2010	Build Fitness trail	<input type="checkbox"/>	View/Edit
First Baptist Church	MOA	MEMORANDUM OF UNDERSTANDING	REC	31-AUG-2010	Maintain Fitness trail	<input type="checkbox"/>	View/Edit
Cabellas	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Water Safety Supplies	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	CNT	CONTRIBUTIONS PROGRAM	ES	18-JUL-2011	test for es	<input type="checkbox"/>	View/Edit
GIRL SCOUTS OF AMERICA	COA	COOPERATIVE AGREEMENT	REC	01-APR-2011	Test	<input type="checkbox"/>	View/Edit



To see more detailed information about any of the agreements or make corrections to the basic agreement and/or organization information, click on **“View/Edit”**.

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Action Edit Query Record Field Help Window

PARTNERSHIP AGREEMENTS

Agreement Type: ALL TYPES Organization: ALL ORGANIZATIONS Organization Type: ALL TYPES

Show Selected Create New Annual Data

Project Site: BARDWELL LAKE

Organization	Agreement Code	Agreement Type	Business Line	Date Effective	Description	Terminated	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	COP	COOPERATING ASSOCIATION	REC	14-MAR-2003	TETRA will will develop, operate and ma	<input type="checkbox"/>	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	MOA	MEMORANDUM OF UNDERSTANDING	REC	01-OCT-2004	Horse Trail Maintenance, Installation1188	<input type="checkbox"/>	View/Edit
Wal-Mart	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Test of System	<input checked="" type="checkbox"/>	View/Edit
U.S. FISH & WILDLIFE SERVICE	ECA	ECONOMY ACT PARTNERSHIP	REC	31-AUG-2010	test of System	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	HCP	HANDSHAKE PARTNERSHIP	REC	31-AUG-2010	Test of Sysytem	<input type="checkbox"/>	View/Edit
Trail Dogs	CCS	CHALLENGE PARTNERSHIP	REC	31-AUG-2010	Build Fitness trail	<input type="checkbox"/>	View/Edit
First Baptist Church	MOA	MEMORANDUM OF U				<input type="checkbox"/>	View/Edit
Cabellas	CNT	CONTRIBUTIONS PRO				<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	CNT	CONTRIBUTIONS PRO				<input type="checkbox"/>	View/Edit
GIRL SCOUTS OF AMERICA	COA	COOPERATIVE AGRE				<input type="checkbox"/>	View/Edit

View Only

 The following table is for viewing purposes only. Annual financial data entry is only available through the annual update accessed through the main partnership screen.

OK

Display of the status of the agreement, checked if terminated.
Record: 1/? <OSC>

A system generated message pops up, but is only partially correct. Annual financial data is available for viewing only in this screen and cannot be updated/edited. However, the Edit and Delete capabilities are active. Edits will only be made permanent upon saving. Deletions are permanent as soon as the delete record button is pressed (Red X at top of page).

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Action Edit Query Record Field Help Window

PARTNERSHIP AGREEMENTS

Project Site: BARDWELL LAKE

Partnership Type: CONTRIBUTIONS PROGRAM

Primary Organization: BOY SCOUTS OF AMERICA

Co-Partners

Description: test for es

Primary Purpose: Education

Date Effective: 18-JUL-2011

Terminated:

In the View/Edit screens, the user can not edit the FY data in the bottom half of the screen. This must be edited through the Annual Update screens.

Fiscal Year	Number of Volunteers	Volunteer Hours	Partner Value				Corps Value					Additional Investments	Total Amount		
			Volunteer Rate	Value of Services	Funds Invested	Professional Services Provided	Materials & Equipment Donated	Total Partner Value	Contract Funds	Services	Materials & Equipment			Total Corps Value	
2011			\$21.36	\$0					\$0				\$0		\$0
2012			\$21.79	\$0					\$0				\$0		\$0

In this screen, users can make changes to the “Description”, “Partnership Type”, “Primary Organization”, “Primary Purpose”, or Co-Partners (note that they are lit up/active). The effective date may only be changed if the agreement was created during the current update year (FY12 for this exercise). For example, if the agreement has data for prior fiscal years, then the effective date may not be changed. The “Terminated” also may not be edited in this screen. Note that those fields are grayed out for this example. An agreement may be deleted only if it was created during the current update year, i.e. you can not delete the record shown, because it was created in FY11. **No changes may be made to any of the FY data in the bottom half of the screen.** Note that they are also grayed out. Changes to the FY data will be described later in this presentation.

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Action Edit Query Record Field Help Window

PARTNERSHIP AGREEMENTS

Project Site: BARDWELL LAKE

Partnership Type: CONTRIBUTIONS PROGRAM

Primary Organization: BOY SCOUTS OF AMERICA

Description: test for es

Primary Purpose: Education

Date Effective: 18-JUL-2011

Terminated:

Co-Partners

In the View/Edit screens, the user can not edit the FY data in the bottom half of the screen. This must be edited through the Annual Update screens.

Fiscal Year	Number of Volunteers	Volunteer Hours	Partner Value				Corps Value						Total Amount	
			Volunteer Rate	Value of Services	Funds Invested	Professional Services Provided	Materials & Equipment Donated	Total Partner Value	Contract Funds	Services	Materials & Equipment	Total Corps Value		Additional Investments
2011			\$21.36	\$0				\$0				\$0		\$0
2012			\$21.79	\$0				\$0				\$0		\$0

Users can change or edit the “Description” by typing in the box above. If change s are needed to the “Partnership Type” due to an error in the original data entry, then double click on the datafield.

PARTNERSHIP AGREEMENTS

Project Site: BARDWELL LAKE
Description: test for es

Partnership Type: **CONTRIBUTIONS PROGRAM** (highlighted in pink)

Primary Organization: **BOY SCOUTS OF AMERICA** (highlighted in pink)
Primary Purpose: **Education** (highlighted in pink)
Date Effective: 18-JUL-2011
Terminated:

Co-Partners

In the View/Edit screens, the user can not e

Fiscal Year	Number of Volunteers	Volunteer Hours	Volunteer Rate
2011			\$21.36
2012			\$21.79

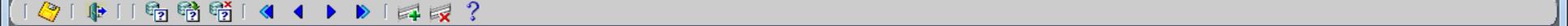
AGREEMENT TYPE DESCRIPTION

Find %

Code	Description
CCS	CHALLENGE PARTNERSHIP
CNT	CONTRIBUTIONS PROGRAM
COP	COOPERATING ASSOCIATION (highlighted in blue)
COA	COOPERATIVE AGREEMENT
ECA	ECONOMY ACT PARTNERSHIP
HCP	HANDSHAKE PARTNERSHIP
MOA	MEMORANDUM OF UNDERSTANDING/MEMORANDUM OF AGREEMENT (MOU/MOA)

Find OK Cancel

In this example, we will change the “Partnership Type” from a Contributions Program to a Cooperating Association so you can easily see the differences in the screen.



PARTNERSHIP AGREEMENTS

Project Site: BARDWELL LAKE

Partnership Type: COOPERATING ASSOCIATION

Primary Organization: BOY SCOUTS OF AMERICA

Description: Test for ES

Primary Purpose: Education

Date Effective: 18-JUL-2011

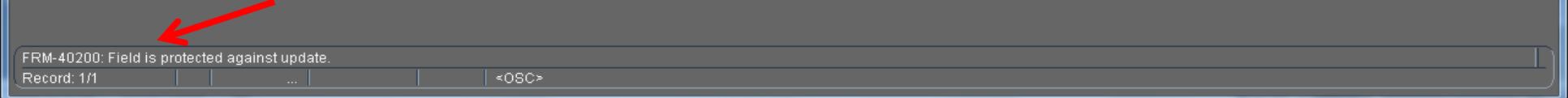
Terminated:

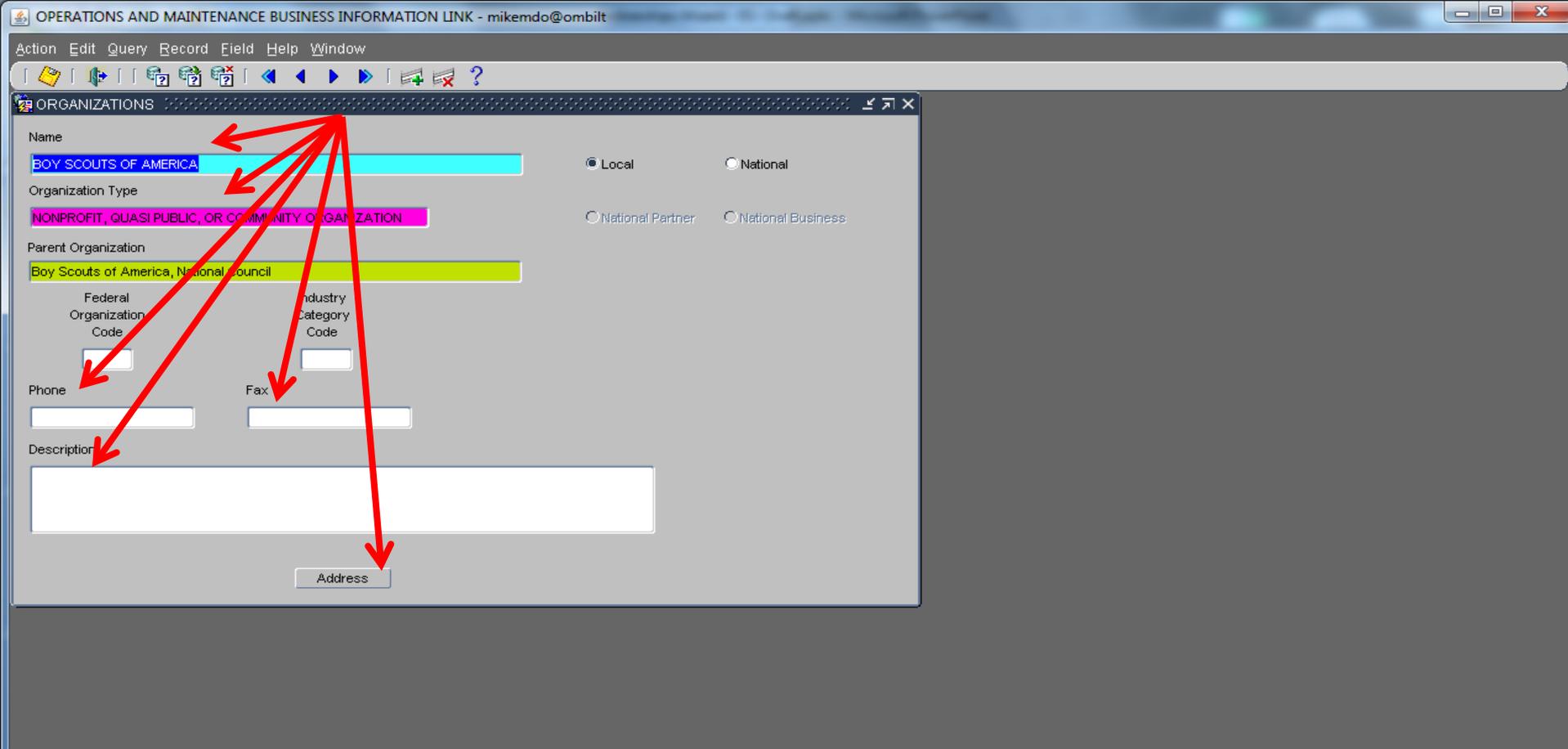
Co-Partners

In the View/Edit screens, the user can not edit the FY data in the bottom half of the screen. This must be edited through the Annual Update screens.

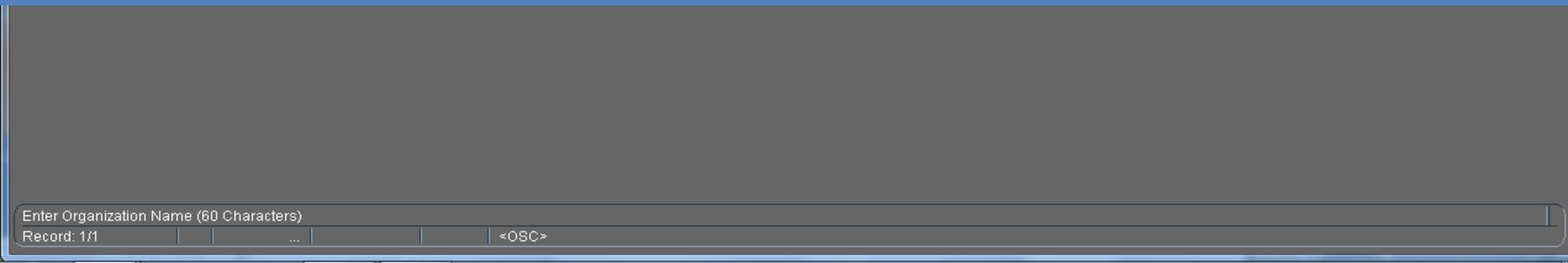
Fiscal Year	Partner Value							Corps Value								
	Number of Volunteers	Volunteer Hours	Volunteer Rate	Value of Services	Value of Sales	Number of Paid Staff	Funds Invested	Professional Services Provided	Materials & Equipment Donated	Total Partner Value	Contract Funds	Services	Materials & Equipment	Total Corps Value	Amount Leveraged	Total Amount
2011			\$21.36	\$0						\$0				\$0		\$0

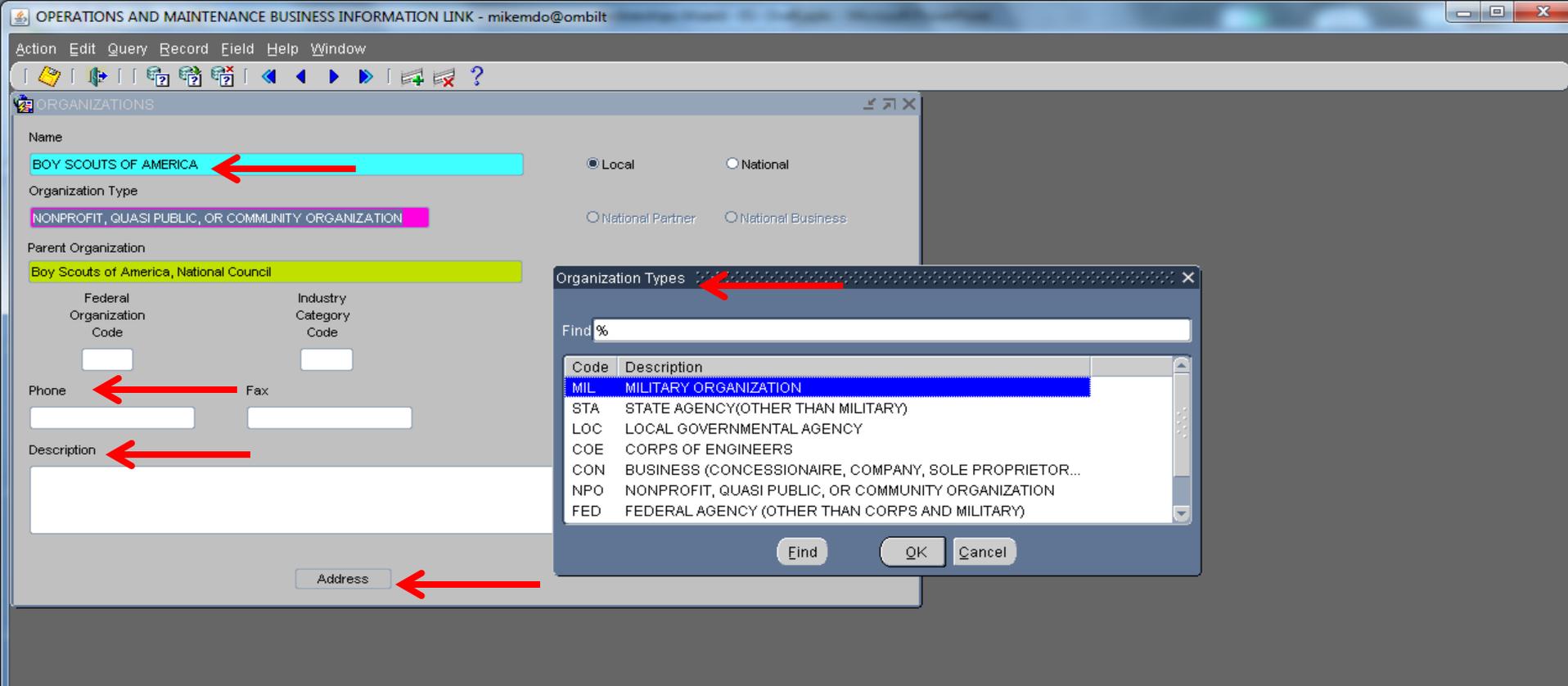
If attempting to change FY data in the bottom half of the screen, a warning message seen below will appear that the field is protected against update. Updating the FY data will be discussed later. If you need to change or edit the name of the organization, double click on the “Primary Organization” datafield.





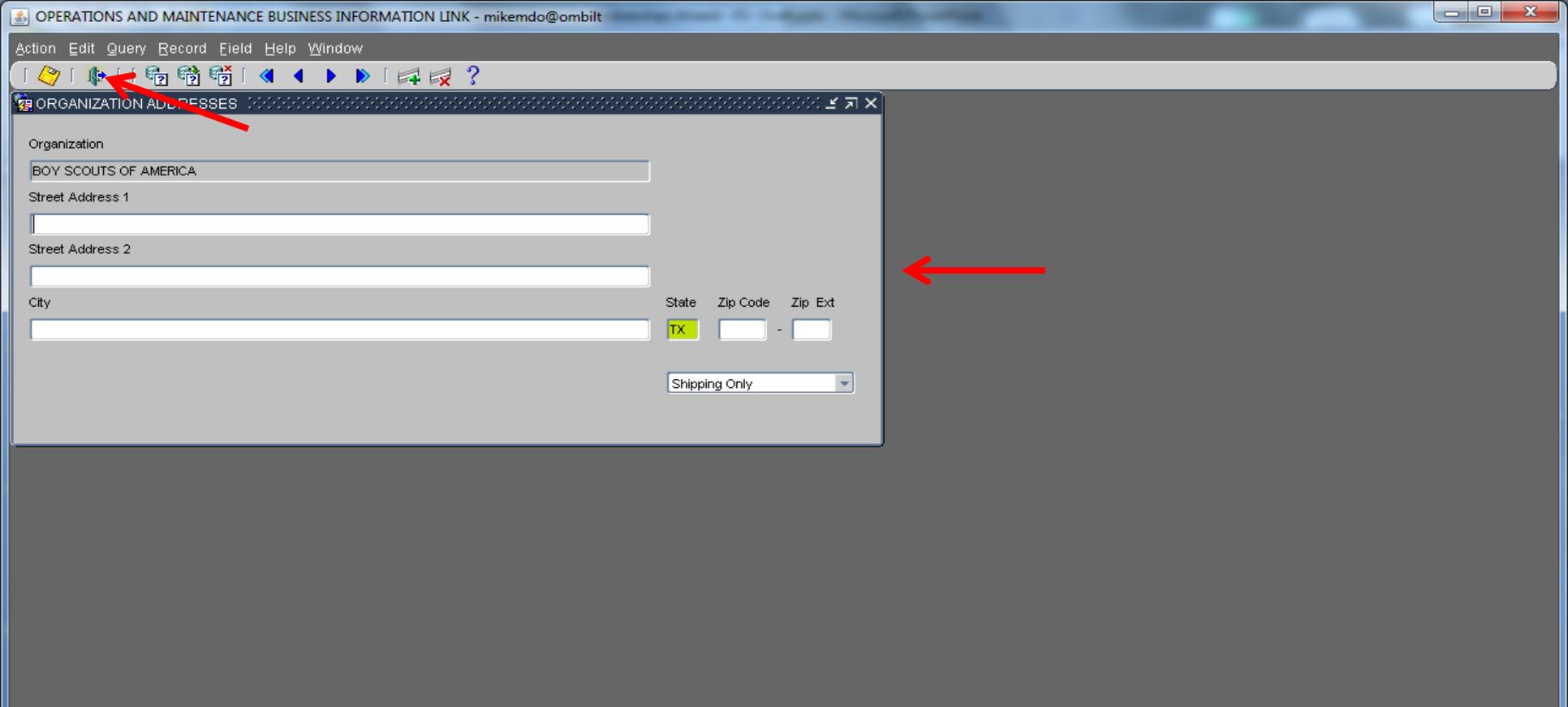
In the **Edit screen**, you can change (correct) the Name of the organization, the Organization Type, Phone, Description, and Address, but you cannot change the Local or National indicator buttons or the Parent Organization. That function is reserved for administrators of the system.



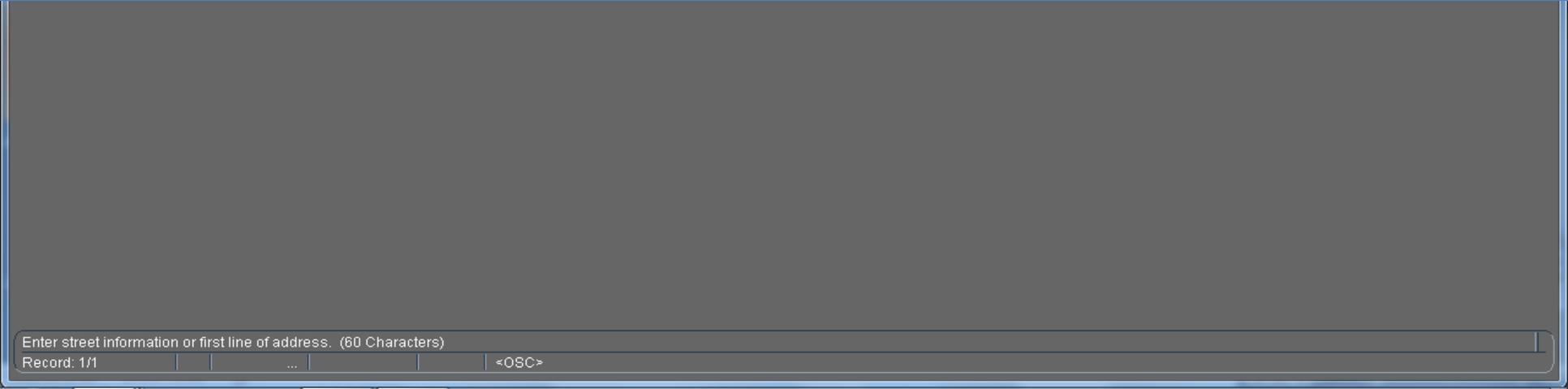


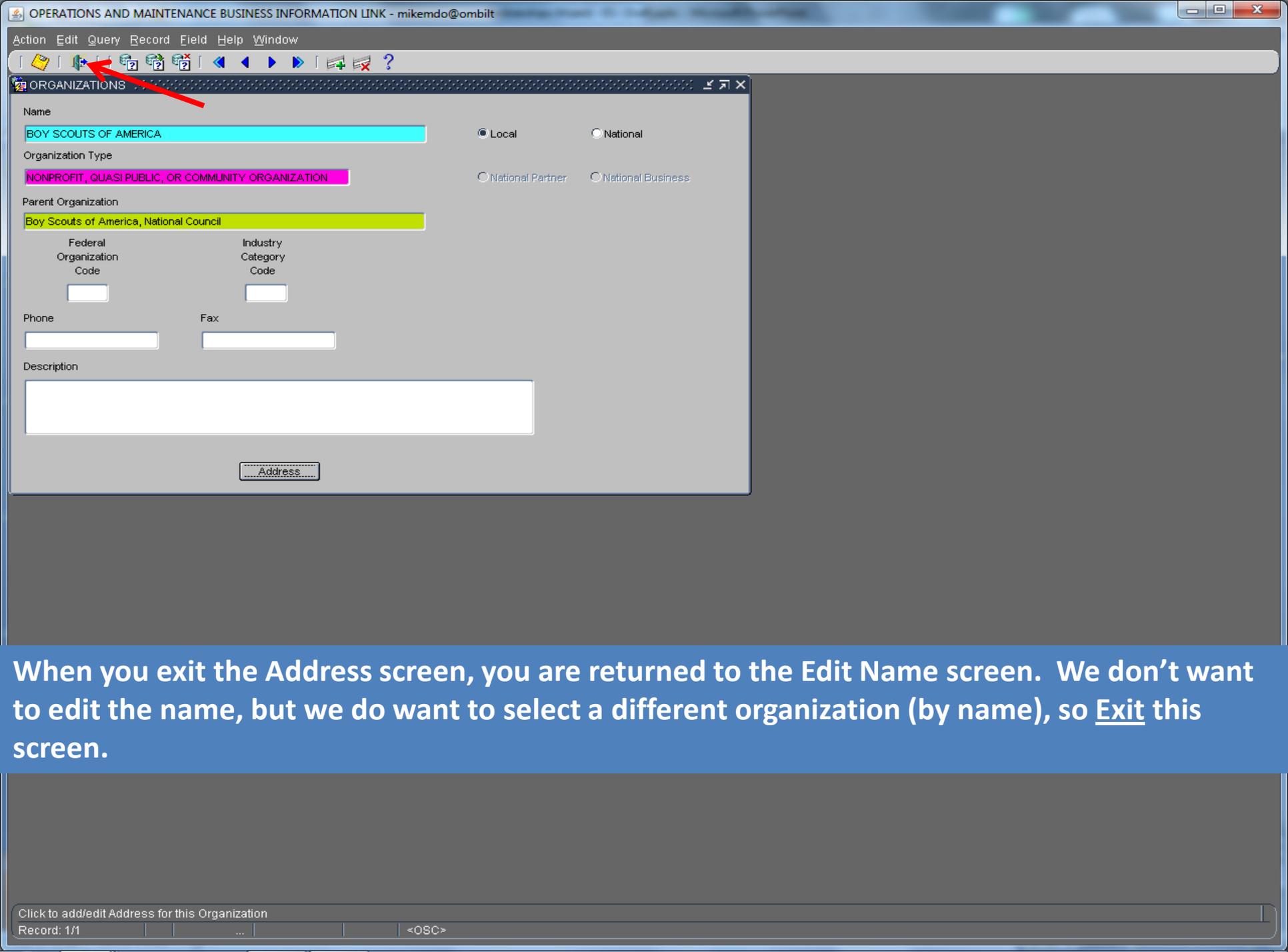
To update (correct) the Name (see * Note below), Phone, or Description, just click on those datafields and type in the correct data. If you need to change the Organization Type, then double click on that datafield to view the pick list shown above. Then select the correct description. To update the Address, click on Address to bring up that screen.

***NOTE** – Do not use this function to change the Name of the Organization to a different Organization. This function is only to correct spelling errors, etc. The process to select a different Organization, or create a new one, will be explained in the next few slides.



In the Address screen, edit any of the datafields as needed, then click on the “Exit” door.





When you exit the Address screen, you are returned to the Edit Name screen. We don't want to edit the name, but we do want to select a different organization (by name), so Exit this screen.

OPERATIONS AND MAINTENANCE BUSINESS INFORMATION LINK - mikemdo@ombilt

Action Edit Query Record Field Help Window

PARTNERSHIP AGREEMENTS

Project Site: BARDWELL LAKE

Partnership Type: CONTRIBUTIONS PROGRAM

Primary Organization: BOY SCOUTS OF AMERICA

Description: Test for ES

Primary Purpose: Education

Date Effective: 18-JUL-2011

Terminated:

Co-Partners

In the View/Edit screens, the user can not edit the FY data in the bottom half of the screen. This must be edited through the Annual Update screens.

Fiscal Year	Number of Volunteers	Volunteer Hours	Partner Value				Corps Value							
			Volunteer Rate	Value of Services	Funds Invested	Professional Services Provided	Materials & Equipment Donated	Total Partner Value	Contract Funds	Services	Materials & Equipment	Total Corps Value	Additional Investments	Total Amount
2011			\$21.36	\$0				\$0				\$0		\$0

This takes you back to the View/Edit screen. If you don't need to edit the Primary Organization, but instead need to change it to another entity (because of previous error, i.e. the wrong organization is listed for the agreement), then double click on the Primary Organization datafield once again.

Double click on this datafield to select the type of agreement for this partnership.

Record: 1/1 ... List of Valu... <OSC>

Action Edit Query Record Field Help Window

PARTNERSHIP AGREEMENTS

Project Site: BARDWELL LAKE
Partnership Type: CONTRIBUTIONS PROGRAM
Primary Organization: BOY SCOUTS OF AMERICA
Description: Test for ES
Primary Purpose: Education
Date Effective: 18-JUL-2011
Terminated:

In the View/Edit screens, the user can not edit the FY data in the bottom half of the screen. This must be edited through the Annual Update screens.

Partner Value								Corps Value						
Fiscal Year	Number of Volunteers	Volunteer Hours	Volunteer Rate	Value of Services	Funds Invested	Professional Services Provided	Materials & Equipment Donated	Total Partner Value	Contract Funds	Services	Materials & Equipment	Total Corps Value	Additional Investments	Total Amount
2011			\$21.36	\$0				\$0				\$0		\$0

To change the “Primary Purpose”, double click on the datafield.

Action Edit Query Record Field Help Window

PARTNERSHIP AGREEMENTS

Project Site: BARDWELL LAKE
Partnership Type: CONTRIBUTIONS PROGRAM
Primary Organization: BOY SCOUTS OF AMERICA
Description: Test for ES
Primary Purpose: Education
Date Effective: 18-JUL-2011
Terminated:

Co-Partners ←

In the View/Edit screens, the user can not edit the FY data in the bottom half of the screen. This must be edited through the Annual Update screens.

Fiscal Year	Number of Volunteers	Volunteer Hours	Volunteer Rate	Value of Services	Partner Value				Corps Value					Total Amount
					Funds Invested	Professional Services Provided	Materials & Equipment Donated	Total Partner Value	Contract Funds	Services	Materials & Equipment	Total Corps Value	Additional Investments	
2011			\$21.36	\$0				\$0				\$0		\$0

You can also add Co-Partners to the agreement by clicking on the Co-Partner button located right under the Primary organization.

Action Edit Query Record Field Help Window

PARTNERSHIP AGREEMENTS

Agreement Type: ALL TYPES Organization: ALL ORGANIZATIONS Organization Type: ALL TYPES

Show Selected Create New Annual Data

Project Site: BARDWELL LAKE

Organization	Agreement Code	Agreement Type	Business Line	Date Effective	Description	Terminated	
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	COP	COOPERATING ASSOCIATION	REC	14-MAR-2003	TETRA will will develope, operate and ma	<input type="checkbox"/>	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	MOA	MEMORANDUM OF UNDERSTANDIN	REC	01-OCT-2004	Horse Trail Maintenance, Installation188	<input type="checkbox"/>	View/Edit
Wal-Mart	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Test of System	<input checked="" type="checkbox"/>	View/Edit
U.S. FISH & WLDLIFE SERVICE	ECA	ECONOMY ACT PARTNERSHIP	REC	31-AUG-2010	test of System	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	HCP	HANDSHAKE PARTNERSHIP	REC	31-AUG-2010	Test of Sysytem	<input type="checkbox"/>	View/Edit
Trail Dogs	CCS	CHALLENGE PARTNERSHIP	REC	31-AUG-2010	Build Fitness trail	<input type="checkbox"/>	View/Edit
First Baptist Church	MOA	MEMORANDUM OF UNDERSTANDIN	REC	31-AUG-2010	Maintain Fitness trail	<input type="checkbox"/>	View/Edit
Cabellas	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Water Safety Supplies	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	CNT	CONTRIBUTIONS PROGRAM	ES	18-JUL-2011	Test for ES	<input type="checkbox"/>	View/Edit
GIRL SCOUTS OF AMERICA	COA	COOPERATIVE AGREEMENT	REC	01-APR-2011	Test	<input type="checkbox"/>	View/Edit

When you exit the "View/Edit" screen, you will be returned to Project Partnership Agreements screen.

OPERATIONS AND MAINTENANCE BUSINESS INFORMATION LINK - mikemdo@ombilt

Action Edit Query Record Field Help Window

PARTNERSHIP AGREEMENTS

Agreement Type: ALL TYPES Organization: ALL ORGANIZATIONS Organization Type: ALL TYPES

Show Selected Create New Annual Data

Project Site: BARDWELL LAKE

Organization	Agreement Code	Agreement Type	Business Line	Date Effective	Description	Terminated	View/Edit
TEXAS EQUISTRIAN TRAIL RIDERS ASSOCIATION	COP	COOPERATING ASSOCIATION	REC	14-MAR-2003	TETRA will will develop, operate and ma	<input type="checkbox"/>	View/Edit
TEXAS EQUISTRIAN TRAIL RIDERS ASSOCIATION	MOA	MEMORANDUM OF UNDERSTANDING	REC	01-OCT-2004	Horse Trail Maintenance, Installation1188	<input type="checkbox"/>	View/Edit
Wal-Mart	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Test of System	<input checked="" type="checkbox"/>	View/Edit
U.S. FISH & WILDLIFE SERVICE	ECA	ECONOMY ACT PARTNERSHIP	REC	31-AUG-2010	test of System	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	HCP	HANDSHAKE PARTNERSHIP	REC	31-AUG-2010	Test of Sysytem	<input type="checkbox"/>	View/Edit
Trail Dogs	CCS	CHALLENGE PARTNERSHIP	REC	31-AUG-2010	Build Fitness trail	<input type="checkbox"/>	View/Edit
First Baptist Church	MOA	MEMORANDUM OF UNDERSTANDING	REC	31-AUG-2010	Maintain Fitness trail	<input type="checkbox"/>	View/Edit
Cabellas	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Water Safety Supplies	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	CNT	CONTRIBUTIONS PROGRAM	ES	18-JUL-2011	Test for ES	<input type="checkbox"/>	View/Edit
GIRL SCOUTS OF AMERICA	COA	COOPERATIVE AGREEMENT	REC	01-APR-2011	Test	<input type="checkbox"/>	View/Edit

If you discover that you need to add a new agreement, simply Click on the “Create New” button.

Action Edit Query Record Field Help Window

WIZARD

WHAT - Basics of the Parnership Agreement

Partnership Agreement Type

Partnership Agreement Type Description

Primary Purpose

Primary Purpose Description

Description

Cancel

Next >>

This is the first of several screens that must be completed in order to add a new Agreement to the Project Site. We will start with the WHAT form by clicking on the data field "Partnership Agreement Type".

Action Edit Query Record Field Help Window

CCS - CHALLENGE PARTNERSHIP
CNT - CONTRIBUTIONS PROGRAM
COP - COOPERATING ASSOCIATION
ECA - ECONOMY ACT PARTNERSHIP
HCP - HANDSHAKE CHALLENGE PARTNERSHIP
MOA - MEMORANDUM OF UNDERSTANDING/MEMORANDUM OF AGREEM

Primary Purpose

Description

Partnership Agreement Type Description

Primary Purpose Description

Cancel Next >>

This will display a list of the **seven types of Partnership Agreements** that are available for selection. For this exercise, we will select **“Economy Act Partnership”**.



WIZARD

WHAT - Basics of the Partnership Agreement

Partnership Agreement Type
ECA... ECONOMY ACT PARTNERSHIP

Partnership Agreement Type Description
Agreements for services and/or supplies with other federal agencies. Congress authorized government agencies to enter into agreements for goods and services when it is in the best interests of each agency and cost savings will result. This kind of agreement requires a determinations and findings approval form that documents verification and approval of legal

Primary Purpose

Primary Purpose Description

Description

Cancel Next >>

Once the Partnership Agreement Type has been selected, the description box to the right will auto-populate with a pre-formatted description that cannot be changed by the user. Now Click on the datafield below Primary Purpose.



WIZARD

WHAT - Basics of the Partnership Agreement

Partnership Agreement Type

- PED - EDUCATION
- PEN - ENVIRONMENTAL STEWARDSHIP**
- PHS - HEALTH AND SAFETY
- PMI - MILITARY
- PRD - RECREATION

Partnership Agreement Type Description

Agreements for services and/or supplies with other federal agencies. Congress authorized government agencies to enter into agreements for goods and services when it is in the best interests of each agency and cost savings will result. This kind of agreement requires a determinations and findings approval form that documents verification and approval of legal

Primary Purpose Description

Description

Cancel Next >>

This will display the **five broad categories** available for selection under Primary Purpose. For this example we will use Environmental Stewardship.

Action Edit Query Record Field Help Window

WIZARD

WHAT - Basics of the Partnership Agreement

Partnership Agreement Type
ECA - ECONOMY ACT PARTNERSHIP

Partnership Agreement Type Description
Agreements for services and/or supplies with other federal agencies. Congress authorized government agencies to enter into agreements for goods and services when it is in the best interests of each agency and cost savings will result. This kind of agreement requires a determinations and findings approval form that documents verification and approval of legal

Primary Purpose
PEN - ENVIRONMENTAL STEWARDSHIP

Primary Purpose Description
A partnership agreement, formal or informal, entered into for the benefit of project environmental stewardship activities.

Description

Cancel Next >>

Once the Primary Purpose has been selected, the description box to the right will auto-populate with a pre-formatted description that cannot be changed by the user.



WIZARD

WHAT - Basics of the Partnership Agreement

Partnership Agreement Type
ECA... ECONOMY ACT PARTNERSHIP

Partnership Agreement Type Description
Agreements for services and/or supplies with other federal agencies. Congress authorized government agencies to enter into agreements for goods and services when it is in the best interests of each agency and cost savings will result. This kind of agreement requires a determinations and findings approval form that documents verification and approval of legal

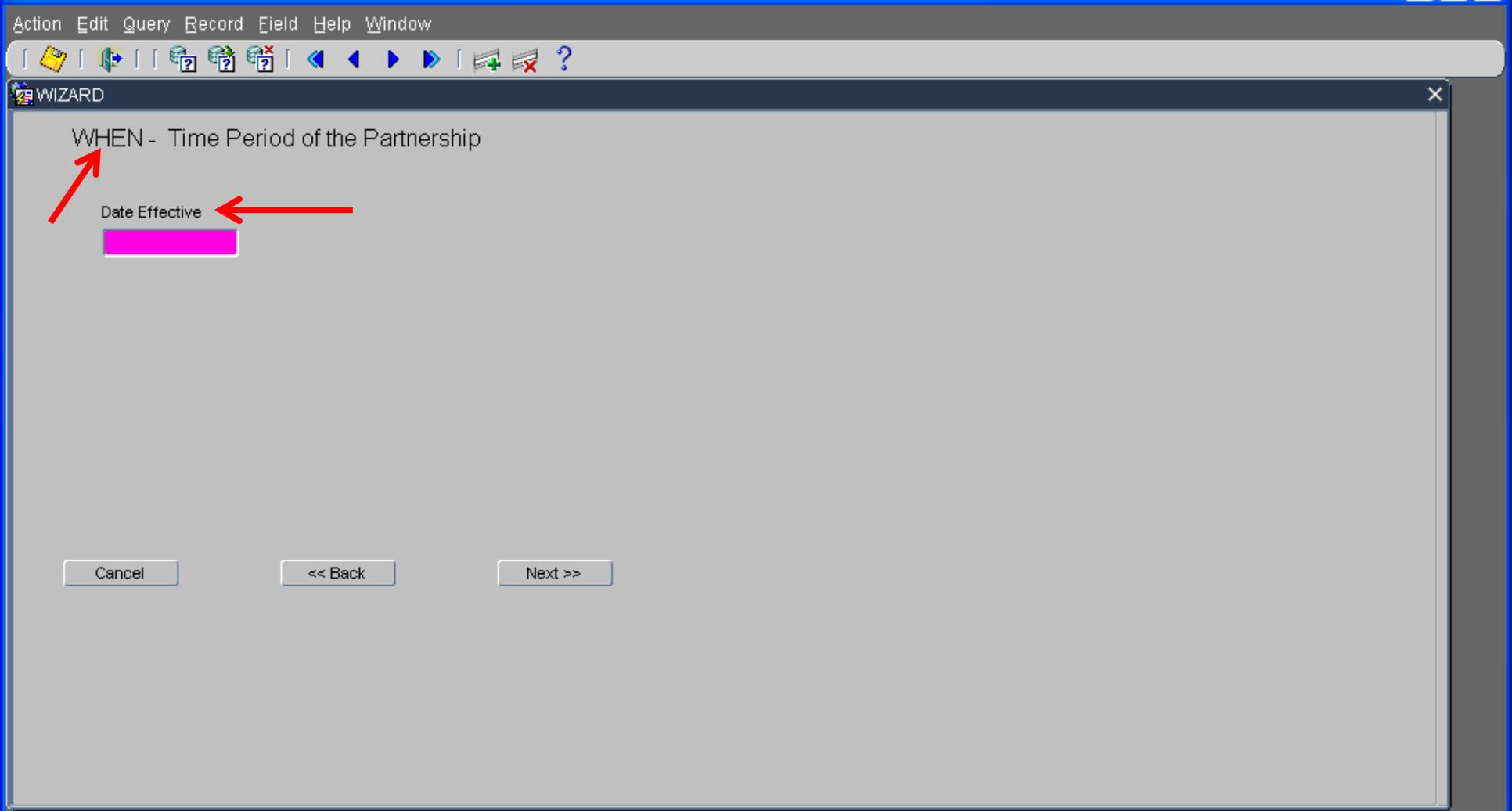
Primary Purpose
PEN - ENVIRONMENTAL STEWARDSHIP

Primary Purpose Description
A partnership agreement, formal or informal, entered into for the benefit of project environmental stewardship activities.

Description
Test of System

Cancel Next >>

Next is the Description box, where the user gives a detailed explanation of the purpose of the agreement. This is limited to **255 characters**, so be concise. Click "Next".



On the WHEN screen, you simply provide the Effective Date for the agreement by either **double clicking** on the datafield, which will bring up a calendar, or by typing the date in the correct format – **dd-mon-yyyy**.

Action Edit Query Record Field Help Window

WIZARD

WHEN - Time Period of the Partnership

Date Effective

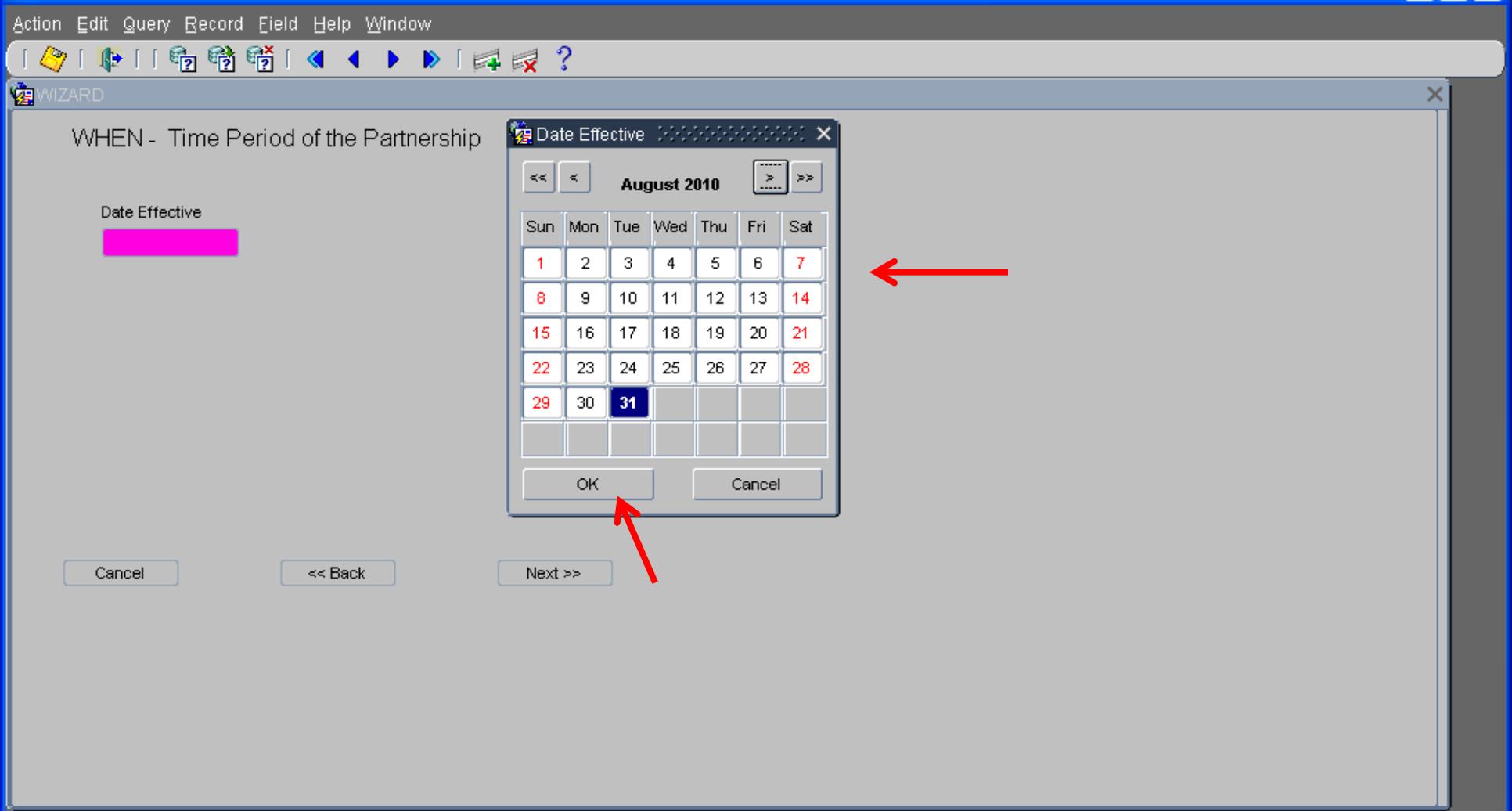
Date Effective

Calendar: August 2010

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

OK Cancel

Cancel << Back Next >>



With the calendar function, you simply select the date you want and then click “OK”.

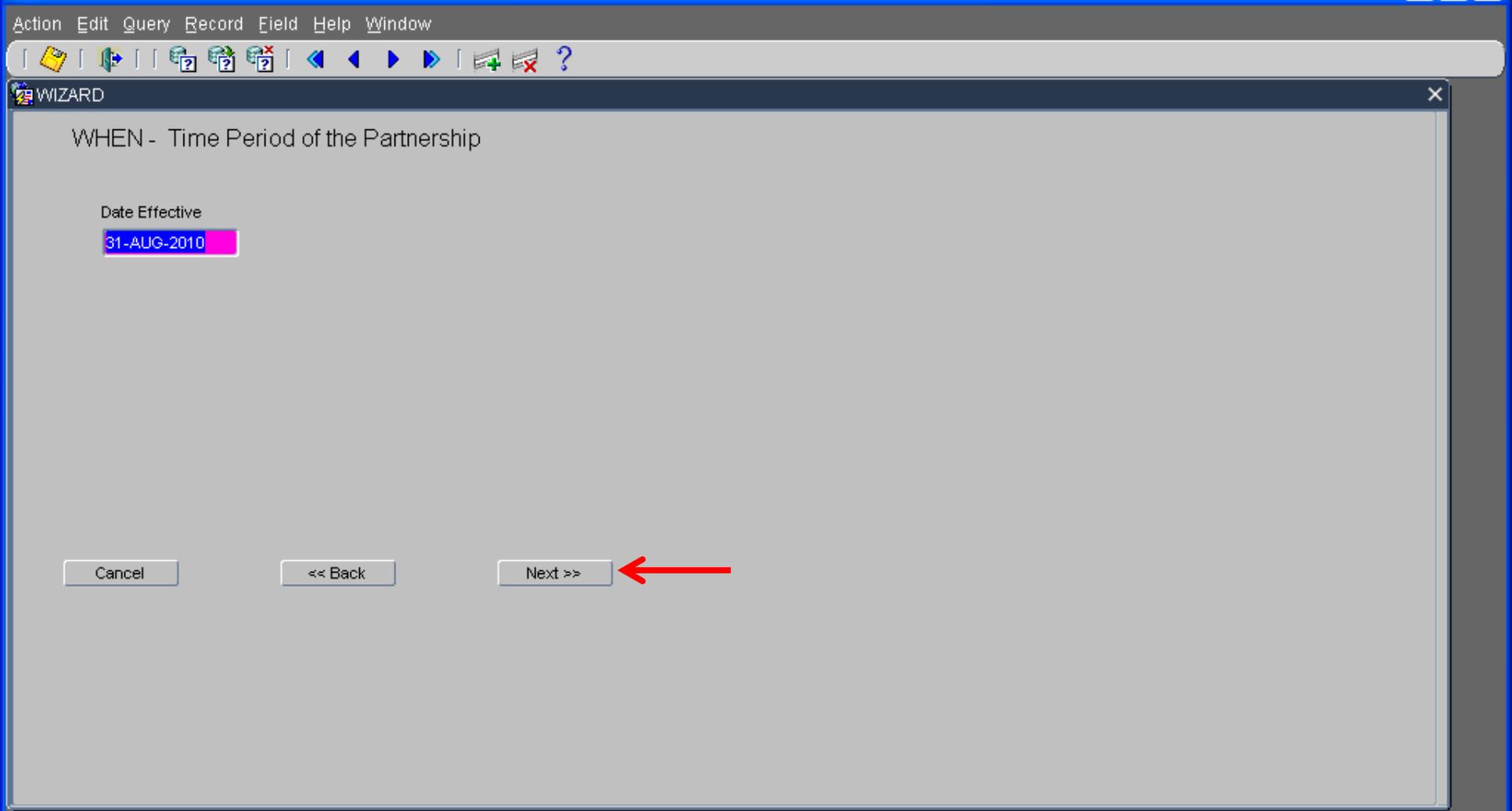
Action Edit Query Record Field Help Window

WIZARD

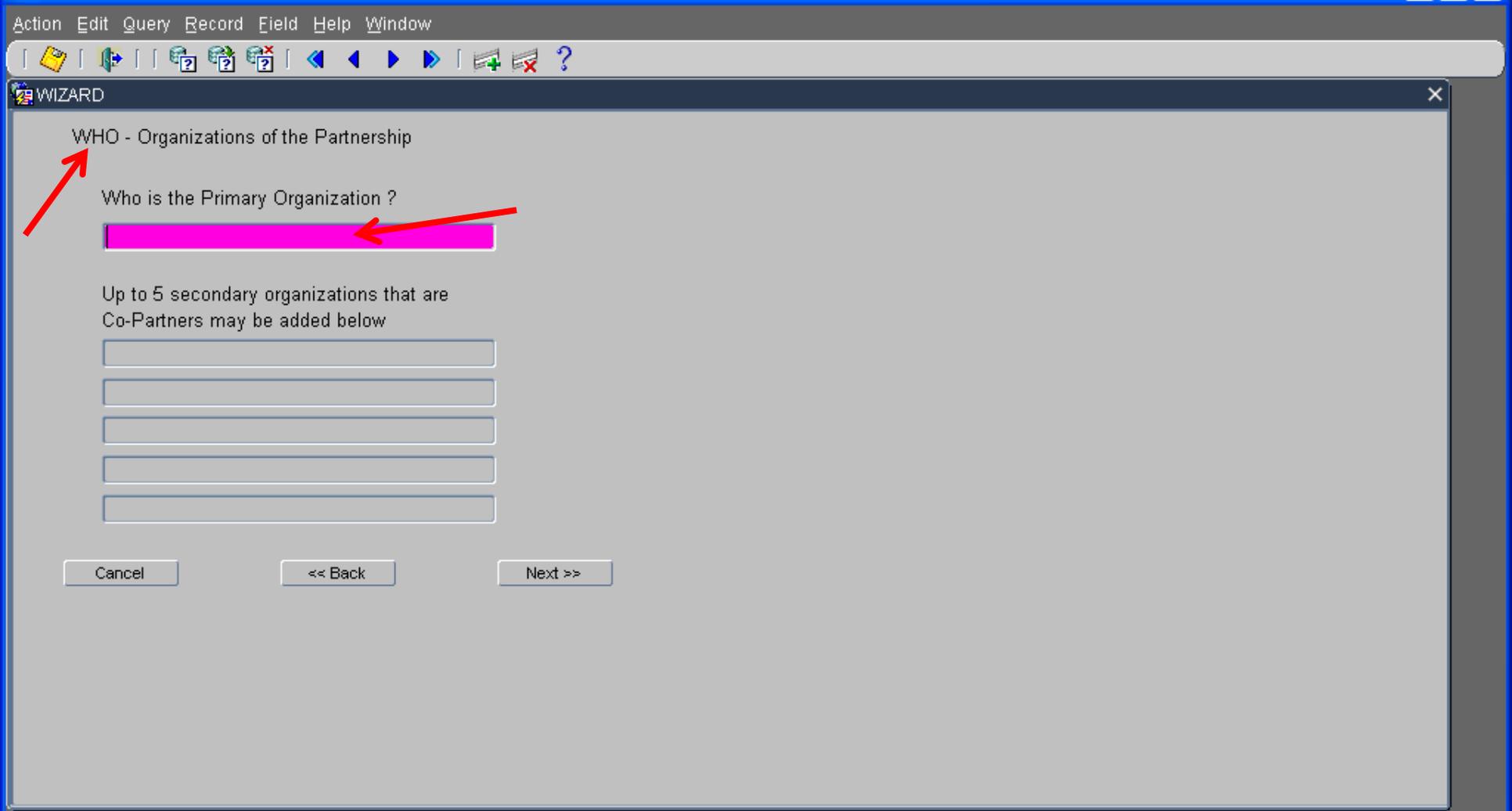
WHEN - Time Period of the Partnership

Date Effective
31-AUG-2010

Cancel << Back Next >>



When you click OK on the Calendar (previous screen), the date will auto-populate the datafield. Once the date has been entered correctly, simply Click “Next”.



The WHO screen is the first step in selecting a Primary Organization, by name. Simply “double Click” on the datafield and it will bring up another screen where you will either select an existing organization or add a new one.

Action Edit Query Record Field Help Window

WIZARD

Filter on Organization Type? <input checked="" type="radio"/> No <input type="radio"/> Yes	Type of Organization < NOT SELECTED >	Search Results 2678
Filter on National Organizations? <input checked="" type="radio"/> No <input type="radio"/> Yes	National Organizations < NOT SELECTED >	2678
Filter on State? <input checked="" type="radio"/> No <input type="radio"/> Yes	States < NOT SELECTED >	2678
Has Partnership at Project Site? <input checked="" type="radio"/> No <input type="radio"/> Yes	Project Site BARDWELL LAKE	2678

Total number of Organizations that will be returned by above selections: 2678

Organizations
Load List >>> [] Use This One

Recommendation
[] New Organization

Cancel

This is the Organization Wizard (which was mentioned earlier when we discussed changing the organization within an agreement or entering Co-partners to an agreement) is a search engine with filters used to find existing Organizations (partners). If the one you are looking for does not exist, you may create a new one. In this example we are going to search for the US Fish & Wildlife Service.



WIZARD

Filter on Organization Type? Type of Organization

No EDU - EDUCATIONAL INSTITUTIONS (SCHOOLS, UNIVERSITIES)

Yes **FED - FEDERAL AGENCY (OTHER THAN THE CORPS)**

Filter LOC - LOCAL GOVERNMENTAL AGENCY

No NPO - NON-PROFIT

Filter OTH - OTHER

No RAO - RELIGIOUS AFFILIATION

No STA - STATE AGENCY

Has P < NOT SELECTED >

No Yes BARDWELL LAKE

Search Results

0

0

0

0

0

Total number of Organizations that will be returned by above selections: 0

Organizations

Load List >>> Use This One

Recommendation

1. You selected to use organization type but did not choose from the type list.

2. Selecting National Organization first will set Organization Type for you.

3. If Organization has a National Parent Organization please use the National List.

4. State is required if you want to create an Organization.

New Organization

Cancel

So first we will filter on **Federal Agency** (Other than the Corps) by clicking the “Yes” radio button for “Filter on Organization Type?”. You will notice that once you make a selection, there are comments that auto-populate in the “Recommendation” box. These comments will change as you make changes to your filters. These are important notes about what to do in different circumstances, so read them carefully.

Action Edit Query Record Field Help Window

WIZARD

Filter on Organization Type? <input type="radio"/> No <input checked="" type="radio"/> Yes	Type of Organization FED ... FEDERAL AGENCY (OTHER THAN THE C...	Search Results 64
Filter on National Organizations? <input checked="" type="radio"/> No <input type="radio"/> Yes	National Organizations < NOT SELECTED >	64
Filter on State? <input checked="" type="radio"/> No <input type="radio"/> Yes	States < NOT SELECTED >	53
Has Partnership at Project Site? <input checked="" type="radio"/> No <input type="radio"/> Yes	Project Site BARDWELL LAKE	53

Total number of Organizations that will be returned by above selections: 53

Organizations
Load List >>> [] Use This One

Recommendation

- 1. If Organization has a National Parent Organization please use the National List.
- 2. State is required if you want to create an Organization.
- 3. You may get better choices if you select a state.
- 4. Create new when Organizations are not confirmed as used at your project site.

Cancel

New Organization

When you select a Type of Organization, then the Search results display 64 Search Results for the type you specified. In this case, it shows there are 64 Federal Agencies (Other than the Corps) listed in the system. Next click the “Yes” radio button for “**Filter on National Organizations?**”

Action Edit Query Record Field Help Window

WIZARD

Filter on Organization Type? No Yes

Type of Organization: FED - FEDERAL AGENCY (OTHER THAN THE C)

Search Results

64
16
16
16

Filter on N: No Yes

Filter on S: No Yes

Has Partn: No Yes

Organizations

Load List >>>

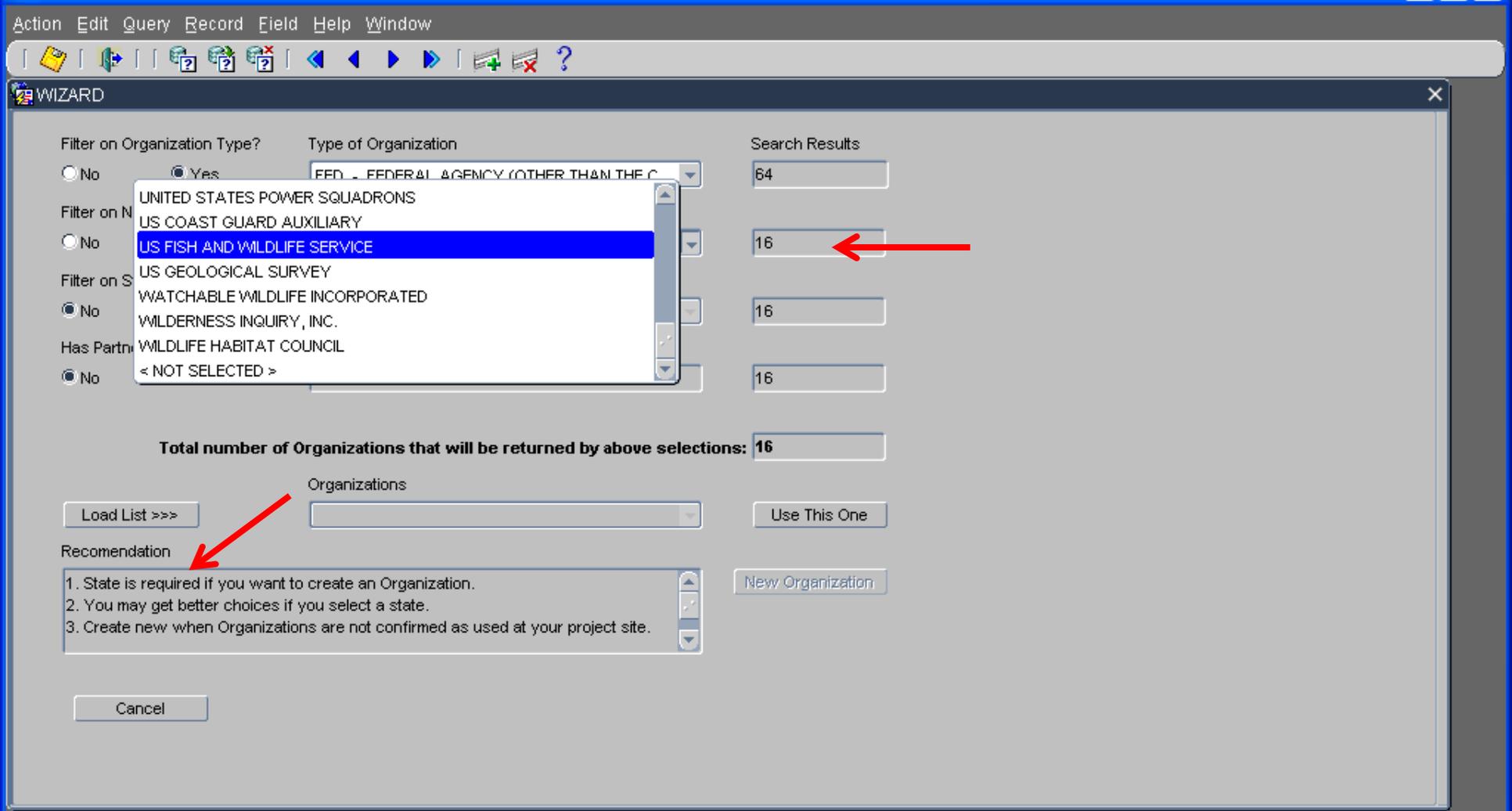
Use This One

Recommendation

1. State is required if you want to create an Organization.
2. You may get better choices if you select a state.
3. Create new when Organizations are not confirmed as used at your project site.

New Organization

Cancel



After filtering on **National Organizations**, we look specifically for US Fish & Wildlife Service. Under Search Results, it now shows there are 16 possible matches and please note that the comments in the “Recommendation” box have changed accordingly.

Action Edit Query Record Field Help Window

WIZARD

Filter on Organization Type?
 No Yes

Filter on National Organizations?
 No Yes

Filter on State? 
 No Yes

Has Partnership at Project Site?
 No Yes

Project Site
BARDWELL LAKE

Search Results

PR PUERTO RICO	64
RI RHODE ISLAND	
SC SOUTH CAROLINA	
SD SOUTH DAKOTA	
TN TENNESSEE	16
TX TEXAS	0 
UM U. S. MINOR OUTLYING ISLANDS	
UT UTAH	

Total number of Organizations that will be returned by above selections: 0

Organizations
Load List >>>  Use This One

Recommendation 

1. You selected to use State but did not choose from the list.
2. Create new when Organizations are not confirmed as used at your project site.
3. You may want to modify selections and retry Load List.
4. You may want to create a new organization if organization is not found.

New Organization

Cancel

Since Bardwell Lake is in Texas, we will now click the “Yes” radio button to Filter on State? And select Texas. As shown, there are currently no matches in Texas for US Fish & Wildlife Service. Again, note the changes in the “Recommendation” box comments.

Action Edit Query Record Field Help Window

WIZARD

Filter on Organization Type? <input type="radio"/> No <input checked="" type="radio"/> Yes	Type of Organization FED - FEDERAL AGENCY (OTHER THAN THE C...	Search Results 64
Filter on National Organizations? <input type="radio"/> No <input checked="" type="radio"/> Yes	National Organizations US FISH AND WILDLIFE SERVICE	16
Filter on State? <input type="radio"/> No <input checked="" type="radio"/> Yes	States TX TEXAS	0
Has Partnership at Project Site? <input type="radio"/> No <input checked="" type="radio"/> Yes	Project Site BARDWELL LAKE	0

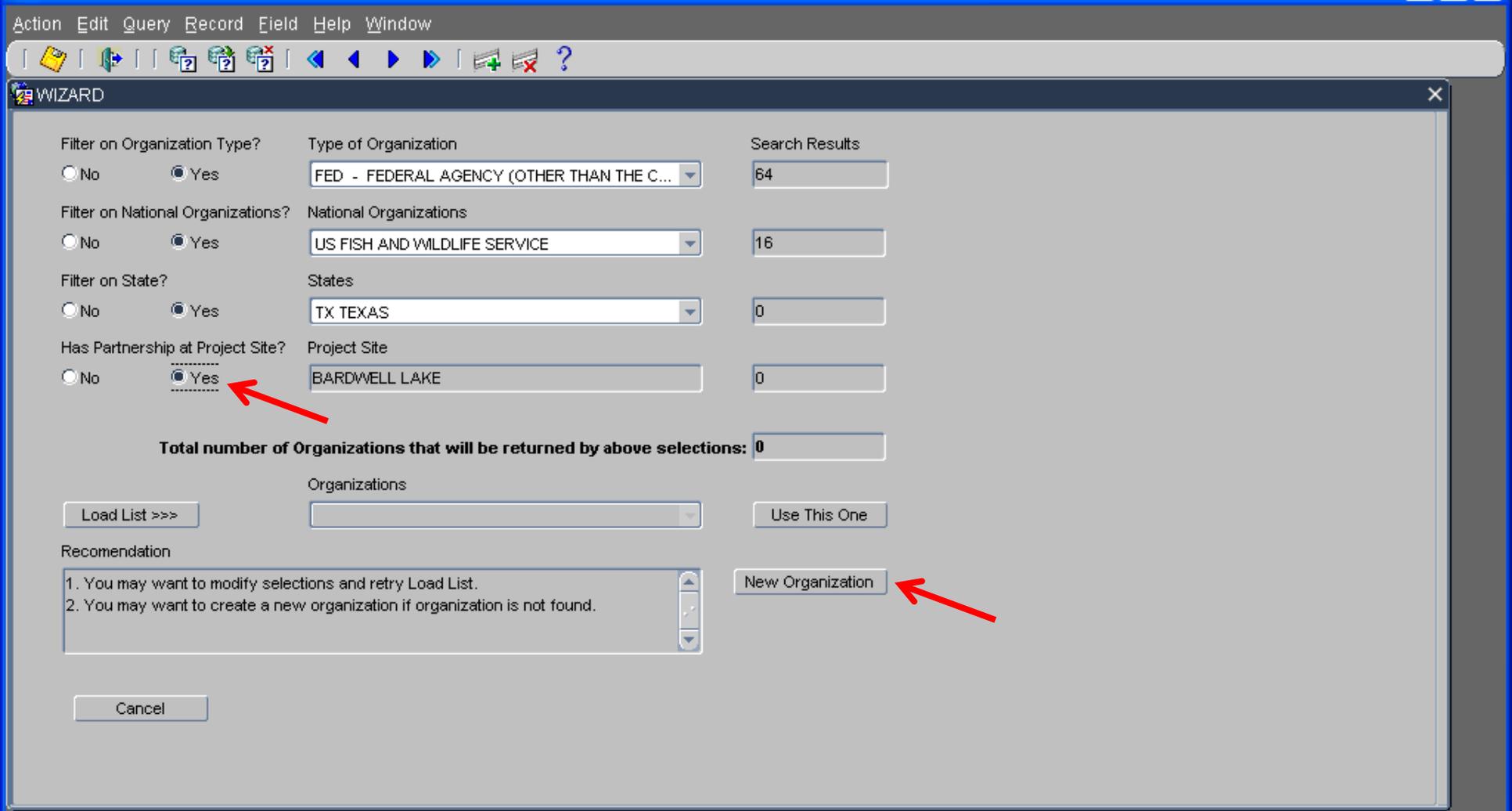
Total number of Organizations that will be returned by above selections: 0

Organizations
Load List >>> [] Use This One

Recommendation
1. You may want to modify selections and retry Load List.
2. You may want to create a new organization if organization is not found.

New Organization

Cancel



Now we check the “Yes” button for the “**Has Partnership at Project Site?**” Because there are no matches to our filters, the “**New Organization**” button has now become activated. Based on the results of our search, we know there is no match at this project site, so click the “New Organization” button.



WIZARD

Filter on Organization Type? No Yes
Type of Organization: FED - FEDERAL AGENCY (OTHER THAN THE C...
Search Results: 64

Filter on National Organizations? No Yes
National Organizations: US FISH AND WILDLIFE SERVICE
Search Results: 16

Filter on State? No Yes
States: TX TEXAS
Search Results: 0

Has Partnership at Project Site? No Yes
Project Site: BARDWELL LAKE
Search Results: 0

Total number of Organizations that will be returned by above selections: 0

Organizations: [Empty List] [Load List >>>] [Use This One]

Recommendation:
1. You may want to modify selections and retry Load List.
2. You may want to create a new organization if organization is not found.
[New Organization..]

Organization Type: FEDERAL AGENCY (OTHER THAN THE CORPUS)
National Parent Organization: US Fish and Wildlife Service
City: [Redacted] State: TX Zip: [Redacted] Zip-Ext: [Redacted]
Street Address 1: [Redacted]
Street Address 2: [Redacted]
Organization Name: [Redacted]
Organization Description: [Redacted]

[Cancel] [Use Above] [Clear Above]

When you click the “New Organization” button, a right hand side screen opens up to reveal the datafields necessary to create a new Organization listing.

Action Edit Query Record Field Help Window

WIZARD

Filter on Organization Type? No Yes

Type of Organization: FED - FEDERAL AGENCY (OTHER THAN THE C...

Filter on National Organizations? No Yes

National Organizations: US FISH AND WILDLIFE SERVICE

Filter on State? No Yes

States: TX TEXAS

Has Partnership at Project Site? No Yes

Project Site: BARDWELL LAKE

Search Results: 64

Organization Type: FEDERAL AGENCY (OTHER THAN THE CORPUS)

National Parent Organization: US Fish and Wildlife Service

City: Ennis

State: TX

Zip:

Zip-Ext:

Street Address 1:

Street Address 2:

Organization Name: US Fish and Wildlife Service

Organization Description: Federal Agency, local office

Total number of Organizations that will be returned by above selections: 0

Organizations:

Load List >>>

Use This One

New Organization

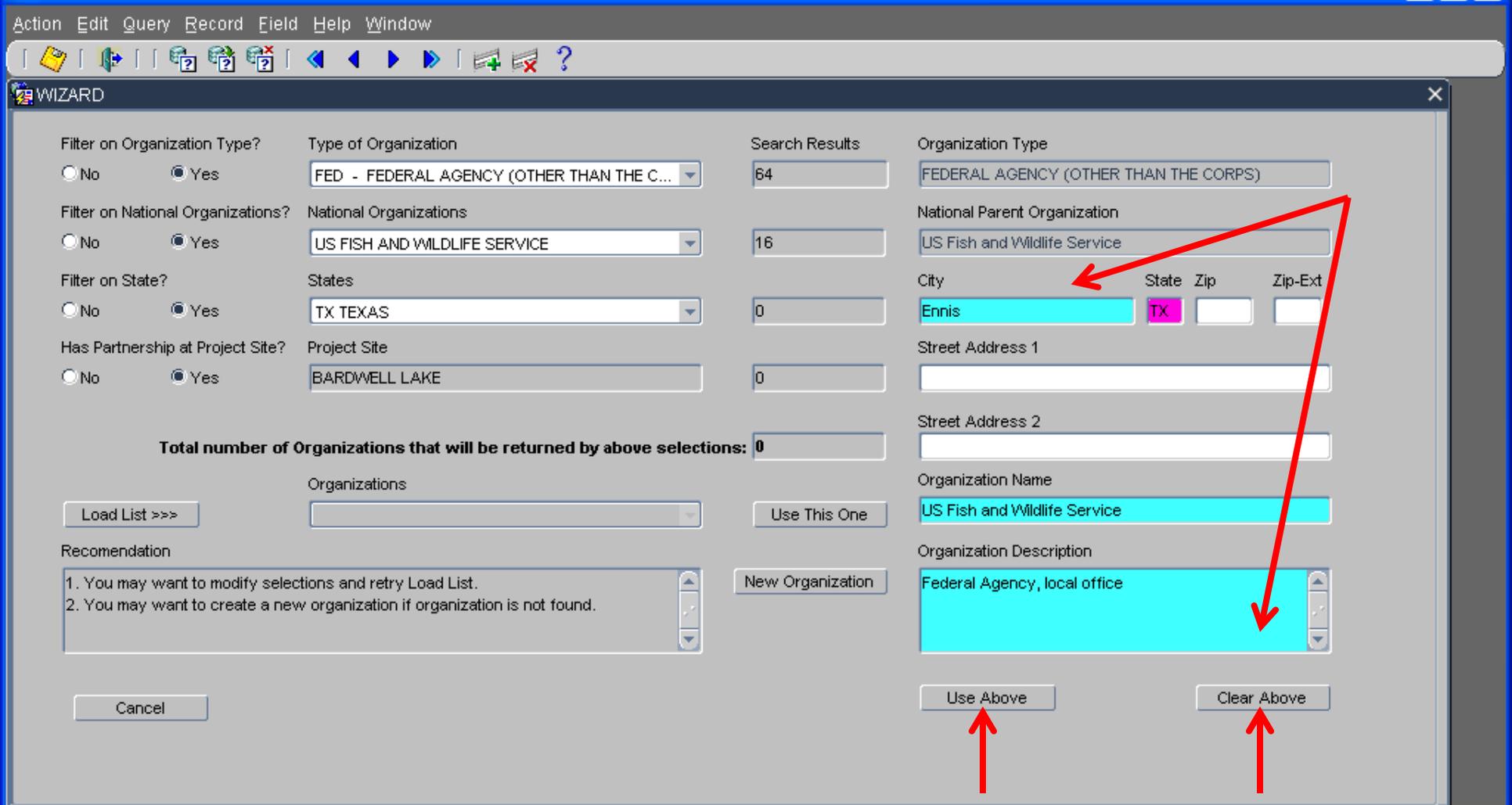
Use Above

Clear Above

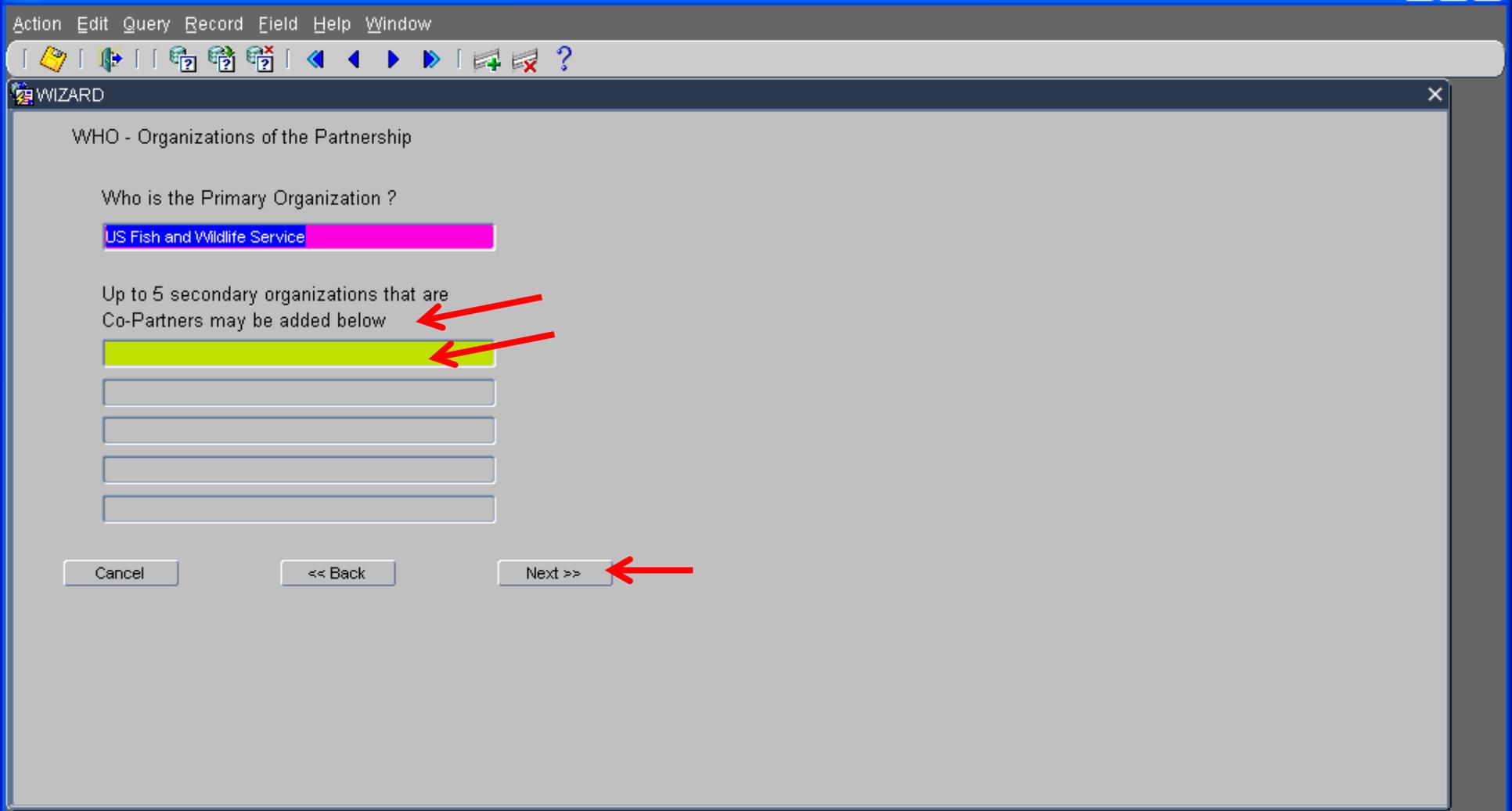
Recommendation

- You may want to modify selections and retry Load List.
- You may want to create a new organization if organization is not found.

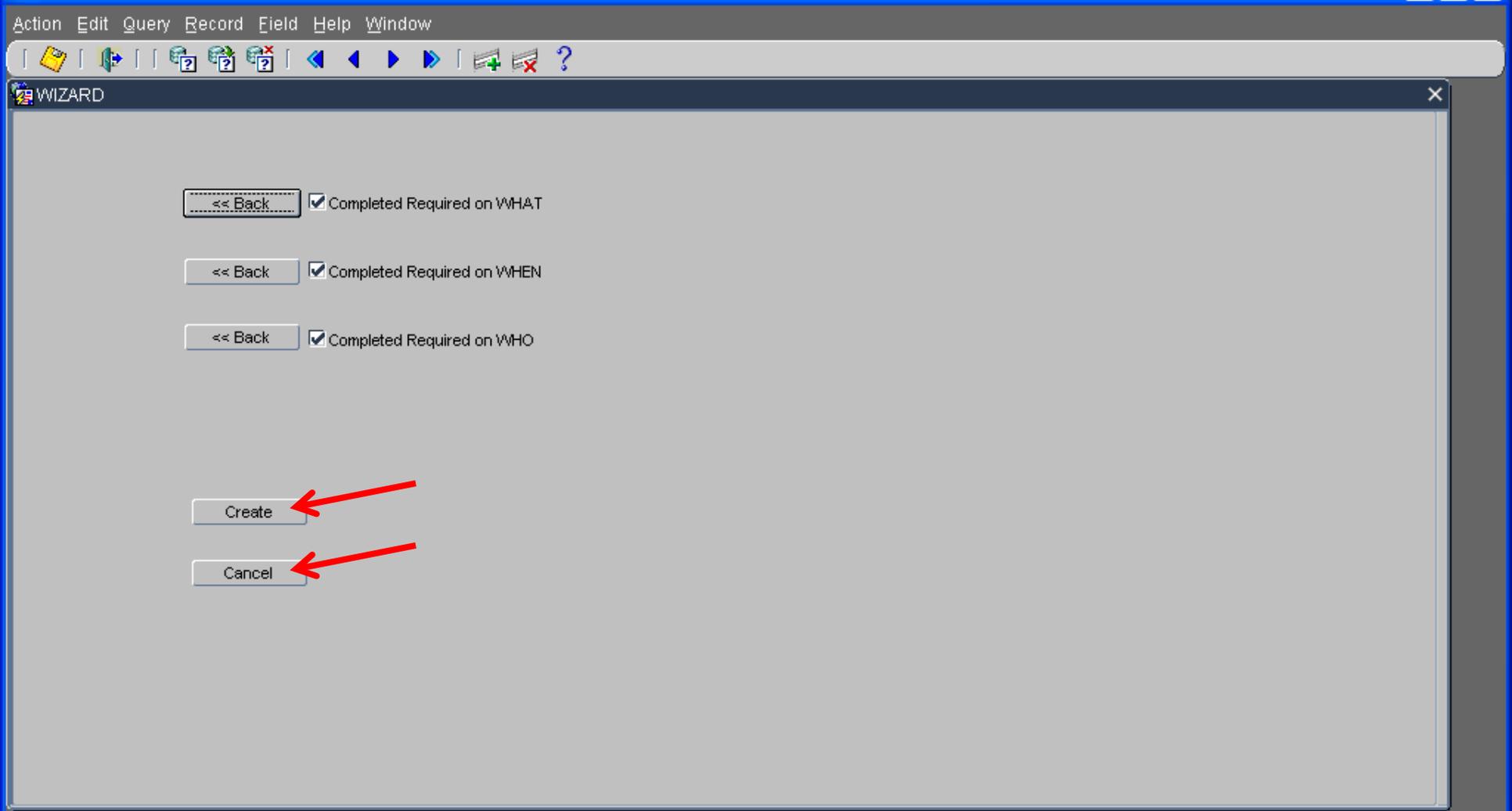
Cancel



Simply fill in the applicable datafields (the colored fields must be completed in order to complete the process). If you make a mistake, or realize you are using the wrong organization, just click the “Clear Above” button and you can start over. Once you have the correct data entered, click on the “Use Above” button to accept this organization.



This automatically takes you back to the Primary Organization screen, and populates the datafield with the organization you created. If there are Co-Partners, they can be added now by double clicking on the yellow/green line and going through the same process you used for the Primary Organization. Click "Next" to proceed to the next screen.



This is a final step in creating the new Agreement, so if you decide you have made an error, simply click on the “Cancel” button and it will abort and take you back to the opening screen. In this case, we will click on “Create” which accepts this new agreement that has just been finished.

Action Edit Query Record Field Help Window

WIZARD

<< Back Completed Required on WHAT

<< Back Completed Required on WHEN

<< Back Completed Required on WHO

Create

Cancel

Create Another Agreement



Would you like to create another agreement?

Yes No



The system will now allow you to create another agreement if you need to do so. In this example we do want to create another agreement, so click on "Yes".

OPERATIONS AND MAINTENANCE BUSINESS INFORMATION LINK - mikemdo@ombilt

Action Edit Query Record Field Help Window

WIZARD

WHAT - Basics of the Partnership Agreement

Partnership Agreement Type
HCP - HANDSHAKE PARTNERSHIP

Partnership Agreement Type Description
These agreements are a subset of challenge partnership agreements. They are partially funded through seed money provided by HQ.

Primary Purpose
PEN - ENVIRONMENTAL STEWARDSHIP

Primary Purpose Description
A partnership agreement, entered into for the benefit of project environmental stewardship activities.

Description
Test of system

Cancel Next >>

This will take you back to the WHAT screen of the “Create New Agreement” process. Handshake Partnership is already selected as the Agreement Type and Recreation as the Primary Purpose, and a purpose entered. Click “Next” to proceed.

Action Edit Query Record Field Help Window

WIZARD

WHEN - Time Period of the Partnership

Date Effective
31-AUG-2009

Cancel << Back Next >>

As before, select the appropriate Effective Date of the agreement, then click “Next”.



WIZARD

WHO - Organizations of the Partnership

Who is the Primary Organization ? 

Up to 5 secondary organizations that are
Co-Partners may be added below

As before, you need to double click on the “Primary Organization” line.

Action Edit Query Record Field Help Window

WIZARD

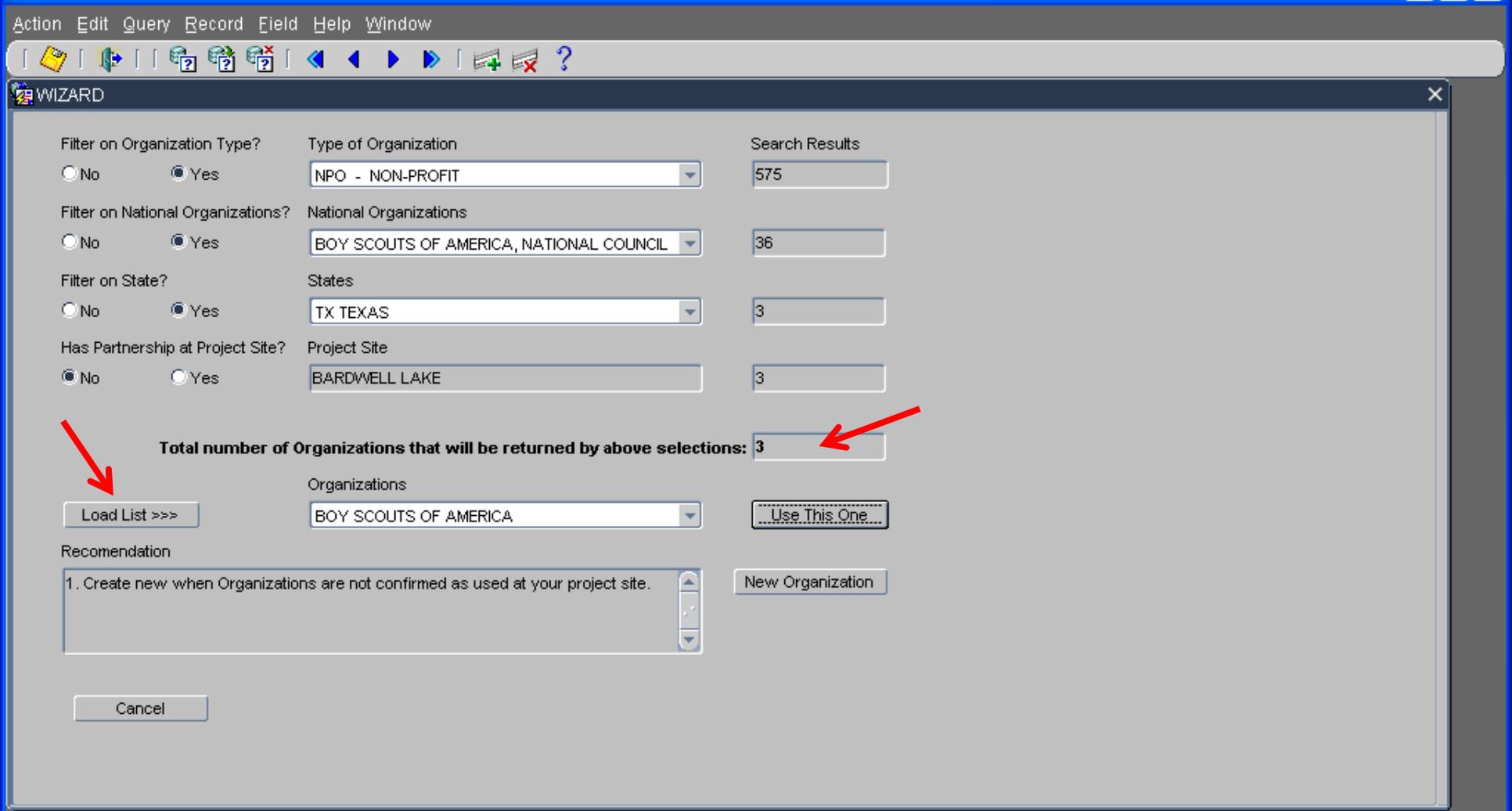
Filter on Organization Type? <input type="radio"/> No <input checked="" type="radio"/> Yes	Type of Organization NPO - NON-PROFIT	Search Results 575
Filter on National Organizations? <input type="radio"/> No <input checked="" type="radio"/> Yes	National Organizations BOY SCOUTS OF AMERICA, NATIONAL COUNCIL	36
Filter on State? <input type="radio"/> No <input checked="" type="radio"/> Yes	States TX TEXAS	3
Has Partnership at Project Site? <input checked="" type="radio"/> No <input type="radio"/> Yes	Project Site BARDWELL LAKE	3

Total number of Organizations that will be returned by above selections: 3

Load List >>> Organizations: BOY SCOUTS OF AMERICA Use This One...

Recommendation
1. Create new when Organizations are not confirmed as used at your project site. New Organization

Cancel



In this example, I have already selected as filters, the Type of Organization of Non-Profit, the National Organization of Boy Scouts of America, National Council, and Texas for State. Then I clicked on the “Load List” button and it displays the three possible matches in the dropdown list.



WIZARD

Filter on Organization Type? <input type="radio"/> No <input checked="" type="radio"/> Yes	Type of Organization NPO - NON-PROFIT	Search Results 574
Filter on National Organizations? <input type="radio"/> No <input checked="" type="radio"/> Yes	National Organizations BOY SCOUTS OF AMERICA, NATIONAL COUNCIL	36
Filter on State? <input type="radio"/> No <input checked="" type="radio"/> Yes	States TX TEXAS	3
Has Partnership at Project Site? <input checked="" type="radio"/> No <input type="radio"/> Yes	Project Site BARDWELL LAKE	3
Total number of Organizations that will be returned by above selections:		3

Organizations

<table border="1"> <tr> <td>Los</td> <td>BOY SCOUTS OF AMERICA</td> <td>▼</td> </tr> <tr> <td>Recon</td> <td>BOY SCOUTS OF AMERICA, NE TEXAS & SE OKLAHOMA TRAILS COUNCIL</td> <td></td> </tr> <tr> <td>1. Cre</td> <td>BOY SCOUTS OF AMERICA, SHERMAN COUNCIL</td> <td></td> </tr> </table>	Los	BOY SCOUTS OF AMERICA	▼	Recon	BOY SCOUTS OF AMERICA, NE TEXAS & SE OKLAHOMA TRAILS COUNCIL		1. Cre	BOY SCOUTS OF AMERICA, SHERMAN COUNCIL		<input type="button" value="Use This One"/>
Los	BOY SCOUTS OF AMERICA	▼								
Recon	BOY SCOUTS OF AMERICA, NE TEXAS & SE OKLAHOMA TRAILS COUNCIL									
1. Cre	BOY SCOUTS OF AMERICA, SHERMAN COUNCIL									
	<input type="button" value="New Organization"/>									

There are three possible matches, and for this example, we want the first one so, simply click on it.

Action Edit Query Record Field Help Window

WIZARD

Filter	Field	Value	Search Results
Filter on Organization Type? <input type="radio"/> No <input checked="" type="radio"/> Yes	Type of Organization	NPO - NON-PROFIT	575
Filter on National Organizations? <input type="radio"/> No <input checked="" type="radio"/> Yes	National Organizations	BOY SCOUTS OF AMERICA, NATIONAL COUNCIL	36
Filter on State? <input type="radio"/> No <input checked="" type="radio"/> Yes	States	TX TEXAS	3
Has Partnership at Project Site? <input checked="" type="radio"/> No <input type="radio"/> Yes	Project Site	BARDWELL LAKE	3

Total number of Organizations that will be returned by above selections: 3

Organizations

Load List >>> Use This One

Recommendation

1. Create new when Organizations are not confirmed as used at your project site.

New Organization

Cancel



Since this is the organization we want to use in this example of a new Agreement, simply click on the “Use This One” button.



WIZARD

Filter on Organization Type? No Yes

Type of Organization: NPO - NON-PROFIT

Search Results: 574

Organization Type: NON-PROFIT

Filter on National Organizations? No Yes

National Organizations: BOY SCOUTS OF AMERICA, NATIONAL COUNCIL

Search Results: 36

National Parent Organization: Boy Scouts of America, National Council

Filter on State? No Yes

States: TX TEXAS

Search Results: 3

City: [] State: TX Zip: [] Zip-Ext: []

Has Partnership at Project Site? No Yes

Project Site: BARDWELL LAKE

Search Results: 3

Street Address 1: []

Total number of Organizations that will be returned by above selections: 3

Street Address 2: []

Organizations: BOY SCOUTS OF AMERICA

Organization Name: BOY SCOUTS OF AMERICA

Recommendation: 1. Create new when Organizations are not confirmed as used at your project site.

Organization Description: []

The pertinent information about this organization now appears on the right hand side of the screen. Since that is the one we want, click on the “Use Above” button.



WIZARD

WHO - Organizations of the Partnership

Who is the Primary Organization ?

BOY SCOUTS OF AMERICA

Up to 5 secondary organizations that are Co-Partners may be added below

As before, this takes you back to the Primary Organization screen and auto-populates the datafield. Click “Next”.

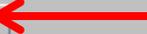


WIZARD

Completed Required on WHAT

Completed Required on WHEN

Completed Required on WHO



Once again we are back at the final screen for creating a new Agreement. Click on the “Create” button.

Action Edit Query Record Field Help Window

WIZARD

<< Back Completed Required on WHAT

<< Back Completed Required on WHEN

<< Back Completed Required on WHO

Create

Cancel

Create Another Agreement



Would you like to create another agreement?

Yes No



The system continues to give you opportunities to create new Agreements until you tell it that you don't need another one. Click "No".



PARTNERSHIP AGREEMENTS

Agreement Type: ALL TYPES | Organization: ALL ORGANIZATIONS | Organization Type: ALL TYPES

Show Selected | Create New | Annual Data

Project Site: BARDWELL LAKE

Organization	Agreement Code	Agreement Type	Business Line	Date Effective	Description	Terminated	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	COP	COOPERATING ASSOCIATION	REC	14-MAR-2003	TETRA will will develop, operate and ma	<input type="checkbox"/>	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	MOA	MEMORANDUM OF UNDERSTANDING	REC	01-OCT-2004	Horse Trail Maintenance, Installation1188	<input type="checkbox"/>	View/Edit
Wal-Mart	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Test of System	<input checked="" type="checkbox"/>	View/Edit
U.S. FISH & WILDLIFE SERVICE	COA	ECONOMY ACT PARTNERSHIP	REC	31-AUG-2010	test of System	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	HCP	HANDSHAKE PARTNERSHIP	REC	31-AUG-2010	Test of System	<input type="checkbox"/>	View/Edit
Trail Dogs	CCS	CHALLENGE PARTNERSHIP	REC	31-AUG-2010	Build Fitness trail	<input type="checkbox"/>	View/Edit
First Baptist Church	MOA	MEMORANDUM OF UNDERSTANDING	REC	31-AUG-2010	Maintain Fitness trail	<input type="checkbox"/>	View/Edit
Cabellas	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Water Safety Supplies	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	CNT	CONTRIBUTIONS PROGRAM	ES	18-JUL-2011	Test for ES	<input type="checkbox"/>	View/Edit
GIRL SCOUTS OF AMERICA	COA	COOPERATIVE AGREEMENT	REC	01-APR-2011	Test	<input type="checkbox"/>	View/Edit

The system returns you to the opening screen of the Wizard and as you can see, the two new agreements we created, one with the US Fish & Wildlife and one with the Boy Scouts are now displayed.



PARTNERSHIP AGREEMENTS

Agreement Type: ALL TYPES | Organization: ALL ORGANIZATIONS | Organization Type: ALL TYPES

Show Selected | Create New | Annual Data

Project Site: BARDWELL LAKE

Organization	Agreement Code	Agreement Type	Business Line	Date Effective	Description	Terminated	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	COP	COOPERATING ASSOCIATION	REC	14-MAR-2003	TETRA will will develope, operate and ma	<input type="checkbox"/>	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	MOA	MEMORANDUM OF UNDERSTANDING	REC	01-OCT-2004	Horse Trail Maintenance, Installation1188	<input type="checkbox"/>	View/Edit
Wal-Mart	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Test of System	<input checked="" type="checkbox"/>	View/Edit
U.S. FISH & WILDLIFE SERVICE	ECA	ECONOMY ACT PARTNERSHIP	REC	31-AUG-2010	test of System	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	HCP	HANDSHAKE PARTNERSHIP	REC	31-AUG-2010	Test of Sysytem	<input type="checkbox"/>	View/Edit
Trail Dogs	CCS	CHALLENGE PARTNERSHIP	REC	31-AUG-2010	Build Fitness trail	<input type="checkbox"/>	View/Edit
First Baptist Church	MOA	MEMORANDUM OF UNDERSTANDING	REC	31-AUG-2010	Maintain Fitness trail	<input type="checkbox"/>	View/Edit
Cabellas	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Water Safety Supplies	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	CNT	CONTRIBUTIONS PROGRAM	ES	18-JUL-2011	Test for ES	<input type="checkbox"/>	View/Edit
GIRL SCOUTS OF AMERICA	COA	COOPERATIVE AGREEMENT	REC	01-APR-2011	Test	<input type="checkbox"/>	View/Edit

Some might think that because you have now entered all of the Partnerships /Agreements, that you are through with the update; however, if you click on the “Exit” door...

OPERATIONS AND MAINTENANCE BUSINESS INFORMATION LINK - mikemdo@ombilt

Action Edit Query Record Field Help Window

PARTNERSHIP AGREEMENTS

Agreement Type: ALL TYPES Organization: ALL ORGANIZATIONS Organization Type: ALL TYPES

Show Selected Create New Annual Data

Project Site: BARDWELL LAKE

Organization	Agreement Code	Agreement Type	Business Line	Date Effective	Description	Terminated	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	COP	COOPERATING ASSOCIATION	REC	14-MAR-2003	TETRA will will develop, operate and ma	<input type="checkbox"/>	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	MOA	MEMORANDUM OF UNDERSTANDING	REC	01-OCT-2004	Horse Trail Maintenance, Installation1188	<input type="checkbox"/>	View/Edit
Wal-Mart	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Test of System	<input checked="" type="checkbox"/>	View/Edit
U.S. FISH & WILDLIFE SERVICE	ECA	ECONOMY ACT PARTNERSHIP	REC	31-AUG-2010	test of System	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	HCP	HANDSHAKE PARTNERSHIP	REC	31-AUG-2010	Test of Sysytem	<input type="checkbox"/>	View/Edit
Trail Dogs	CCS	CHALLENGE PARTNERSHIP	REC	31-AUG-2010	Test of System	<input type="checkbox"/>	View/Edit
First Baptist Church	MOA	MEMORANDUM OF UNDERSTANDING	REC	31-AUG-2010	Test of System	<input type="checkbox"/>	View/Edit
Cabellas	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Test of System	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Test of System	<input type="checkbox"/>	View/Edit
GIRL SCOUTS OF AMERICA	COA	COOPERATIVE AGREEMENT	REC	31-AUG-2010	Test of System	<input type="checkbox"/>	View/Edit

NOTICE!!!

You must proceed to the Annual Data to update the financial information for each agreement. This can be done until 30-JUN-12. It must be completed in order to be 100% complete with the update.

OK

You will receive this System Message letting you know you still have to go through the “Annual Data” in order to complete the update process, so click on “OK”. This message says the update can be done only until 30 June 2012; however, that is just for training purposes and the actual date (usually the end of Oct of the update year) will be shown during the live update.

Action Edit Query Record Field Help Window

PARTNERSHIP AGREEMENTS

Agreement Type: ALL TYPES Organization: ALL ORGANIZATIONS Organization Type: ALL TYPES

Show Selected Create New **Annual Data**

Project Site: BARDWELL LAKE

Organization	Agreement Code	Agreement Type	Business Line	Date Effective	Description	Terminated	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	COP	COOPERATING ASSOCIATION	REC	14-MAR-2003	TETRA will will develope, operate and ma	<input type="checkbox"/>	View/Edit
TEXAS EQUESTRIAN TRAIL RIDERS ASSOCIATION	MOA	MEMORANDUM OF UNDERSTANDIN	REC	01-OCT-2004	Horse Trail Maintenance, Installation1188	<input type="checkbox"/>	View/Edit
Wal-Mart	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Test of System	<input checked="" type="checkbox"/>	View/Edit
U.S. FISH & WLDLIFE SERVICE	ECA	ECONOMY ACT PARTNERSHIP	REC	31-AUG-2010	test of System	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	HCP	HANDSHAKE PARTNERSHIP	REC	31-AUG-2010	Test of Sysytem	<input type="checkbox"/>	View/Edit
Trail Dogs	CCS	CHALLENGE PARTNERSHIP	REC	31-AUG-2010	Build Fitness trail	<input type="checkbox"/>	View/Edit
First Baptist Church	MOA	MEMORANDUM OF UNDERSTANDIN	REC	31-AUG-2010	Maintain Fitness trail	<input type="checkbox"/>	View/Edit
Cabellas	CNT	CONTRIBUTIONS PROGRAM	REC	31-AUG-2010	Water Safety Supplies	<input type="checkbox"/>	View/Edit
BOY SCOUTS OF AMERICA	CNT	CONTRIBUTIONS PROGRAM	ES	18-JUL-2011	Test for ES	<input type="checkbox"/>	View/Edit
GIRL SCOUTS OF AMERICA	COA	COOPERATIVE AGREEMENT	REC	01-APR-2011	Test	<input type="checkbox"/>	View/Edit

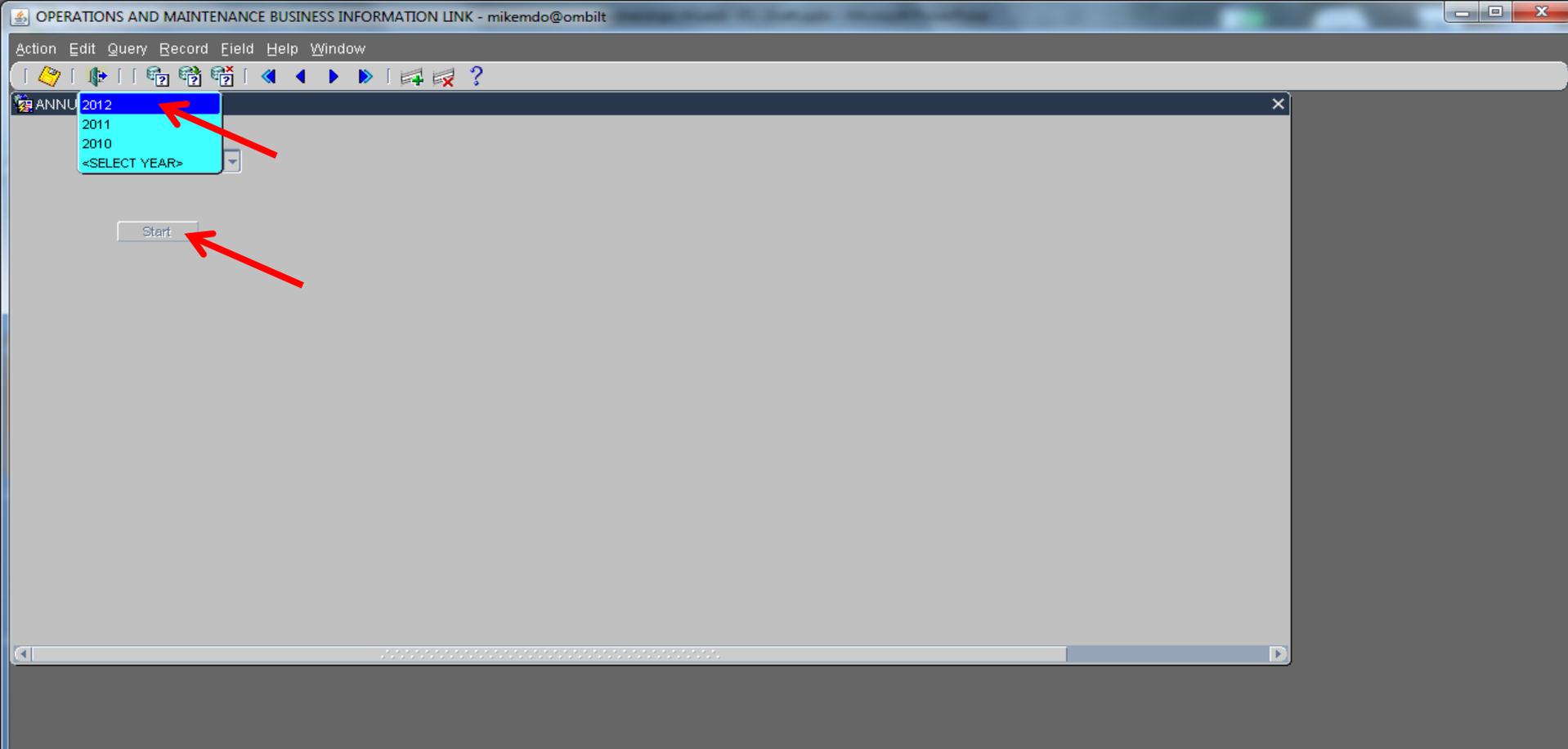
This will take you back into the Partnership wizard and at this point we are ready to begin the update of Annual Data, so click on the **“Annual Data”** button.

Action Edit Query Record Field Help Window

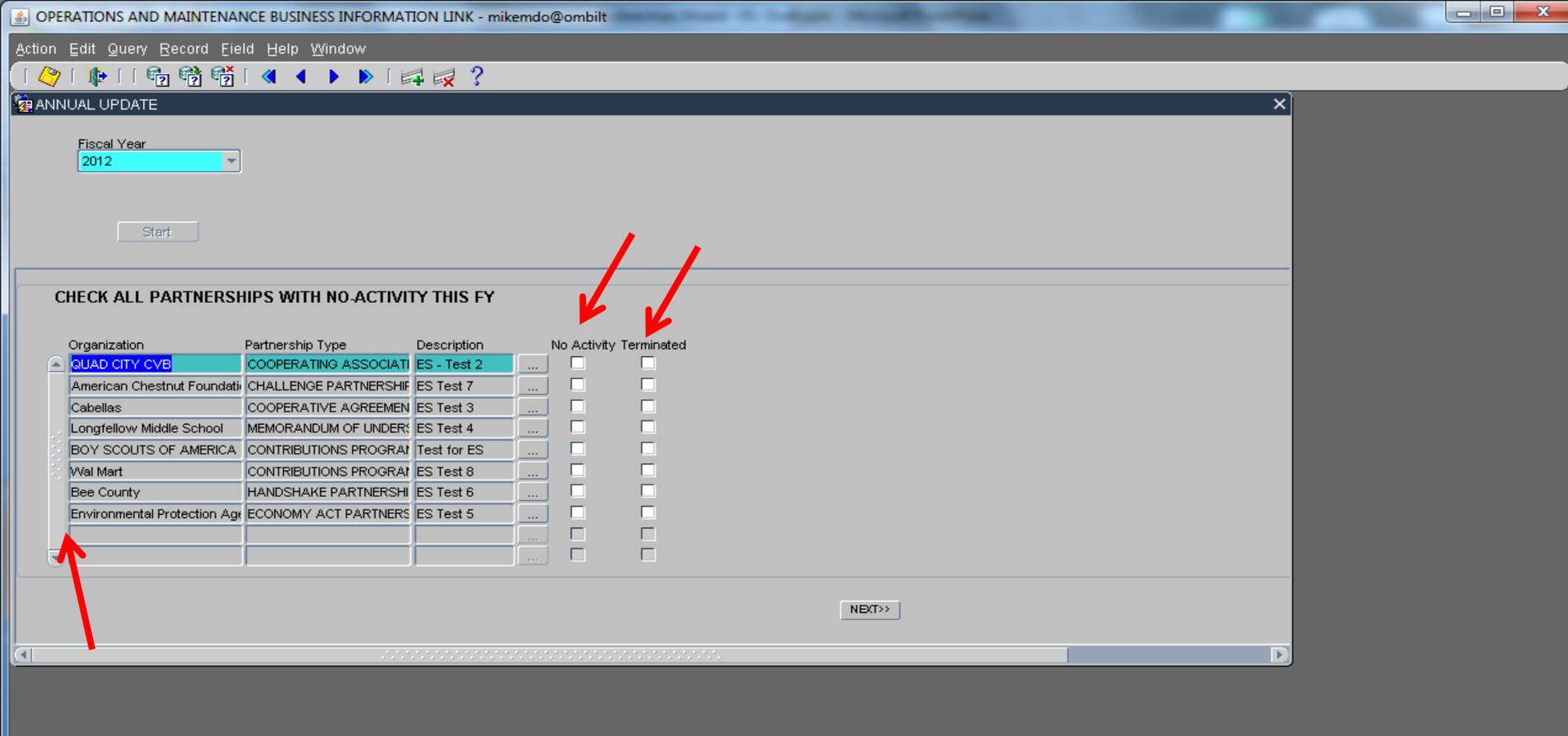
Fiscal Year
<Select fiscal year>

Start

Begin by selecting a Fiscal Year. Click on <Select fiscal year>.



We are updating data for FY 2012, so simply select 2012 from the dropdown list and then click “Start”. You will only be able to update data for the report FY. All other fiscal year data is locked and any changes to prior years must be requested through the District POC.



This screen displays all of the Partnerships currently listed at the Project Site; however, some of them may not have had any activity during the report FY, so you can eliminate them from the update process by clicking on the “No Activity” box located at the end of each Agreement. There is also a column labeled “Terminated” so if any of the agreements have been terminated, i.e. there will never be any more activity under that agreement, then check that box. Note the scroll bar to the left. If you have more agreements than will display on one page, you will need to scroll down to see the remainder.

OPERATIONS AND MAINTENANCE BUSINESS INFORMATION LINK - mikemdo@ombilt

Action Edit Query Record Field Help Window

ANNUAL UPDATE

Fiscal Year
2012

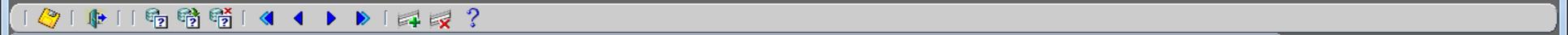
Start

CHECK ALL PARTNERSHIPS WITH NO ACTIVITY THIS FY

Organization	Partnership Type	Description	No Activity	Terminated
QUAD CITY CVB	COOPERATING ASSOCIATI	ES - Test 2	<input type="checkbox"/>	<input type="checkbox"/>
American Chestnut Foundati	CHALLENGE PARTNERSHIP	ES Test 7	<input type="checkbox"/>	<input type="checkbox"/>
Cabellas	COOPERATIVE AGREEMEN	ES Test 3	<input type="checkbox"/>	<input type="checkbox"/>
Longfellow Middle School	MEMORANDUM OF UNDER	ES Test 4	<input type="checkbox"/>	<input type="checkbox"/>
BOY SCOUTS OF AMERICA	CONTRIBUTIONS PROGRAM	Test for ES	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Wal Mart	CONTRIBUTIONS PROGRAM	ES Test 8	<input type="checkbox"/>	<input type="checkbox"/>
Bee County	HANDSHAKE PARTNERSHI	ES Test 6	<input type="checkbox"/>	<input type="checkbox"/>
Environmental Protection Agt	ECONOMY ACT PARTNERS	ES Test 5	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>

NEXT>>

In this example, we marked one of the agreements as having No Activity during this report FY. So to proceed to the update, Click "Next".



ANNUAL UPDATE

Fiscal Year
2012

Start

CHECK ALL PARTNERSHIPS WITH NO ACTIVITY THIS FY

Organization	Partnership Type	Description	No Activity Terminated	
QUAD CITY CVB	COOPERATING ASSOCIATI	ES - Test 2	<input type="checkbox"/>	<input type="checkbox"/>
American Chestnut Foundati	CHALLENGE PARTNERSHIP	ES Test 7	<input type="checkbox"/>	<input type="checkbox"/>
Cabellas	COOPERATIVE AGREEMEN	ES Test 3	<input type="checkbox"/>	<input type="checkbox"/>
Longfellow Middle School	MEMORANDUM OF UNDER:	ES Test 4	<input type="checkbox"/>	<input type="checkbox"/>
BOY SCOUTS OF AMERICA	CONTRIBUTIONS PROGRAM	Test for ES	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Wal Mart	CONTRIBUTIONS PROGRAM	ES Test 8	<input type="checkbox"/>	<input type="checkbox"/>
Bee County	HANDSHAKE PARTNERSHI	ES Test 6	<input type="checkbox"/>	<input type="checkbox"/>
Environmental Protection Ag	ECONOMY ACT PARTNERS	ES Test 5	<input type="checkbox"/>	<input type="checkbox"/>

Review Agreements



Please review the agreements. If you need more than what is listed, click the create button.

OK

A system message once again gives you another chance to **Create a New Agreement** if you notice that one is missing. Click the **“OK”** button.

OPERATIONS AND MAINTENANCE BUSINESS INFORMATION LINK - mikemdo@ombilt

Action Edit Query Record Field Help Window

ANNUAL UPDATE

Fiscal Year
2012

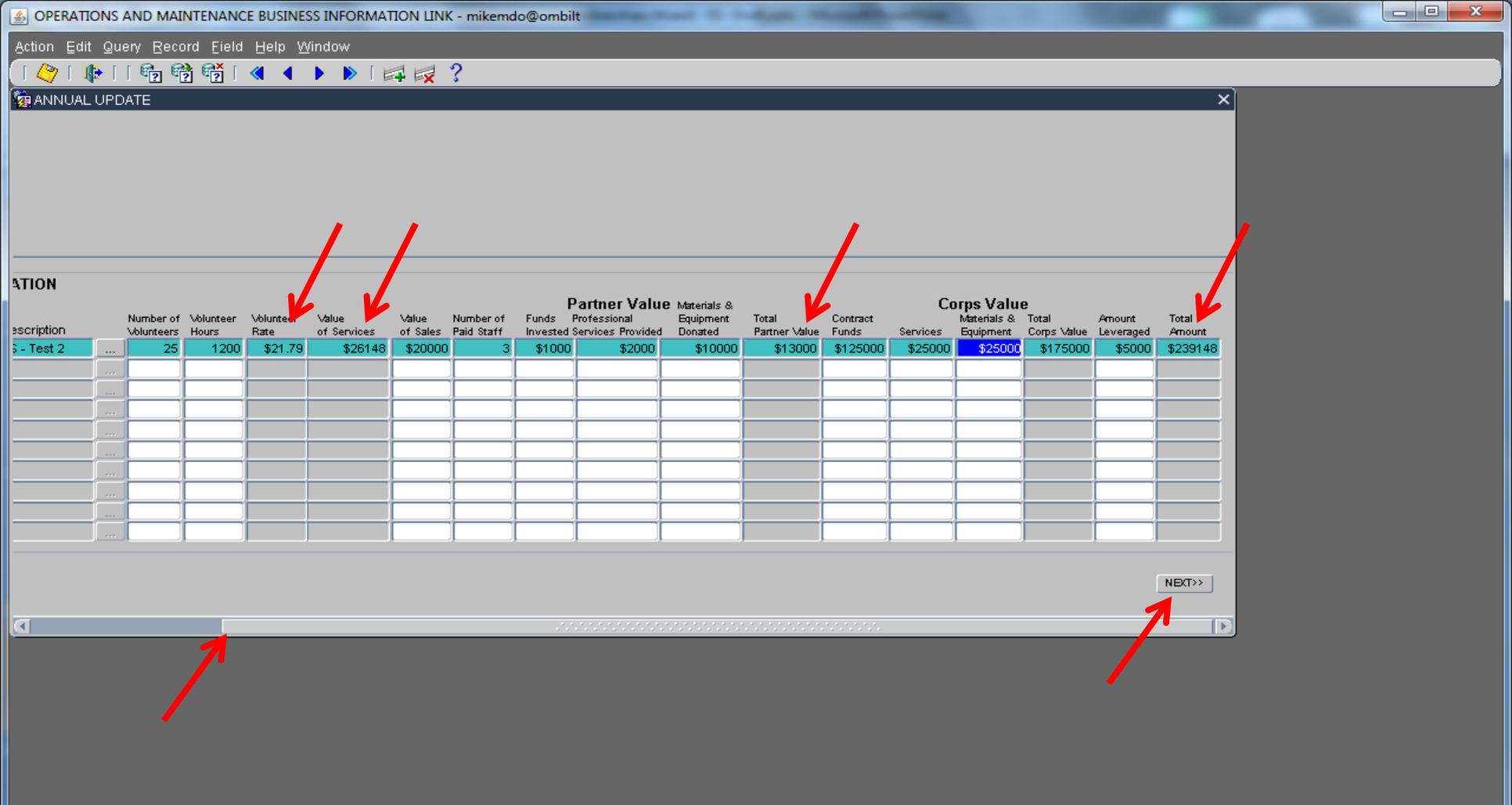
Start

ACTIVE PARTNERSHIPS

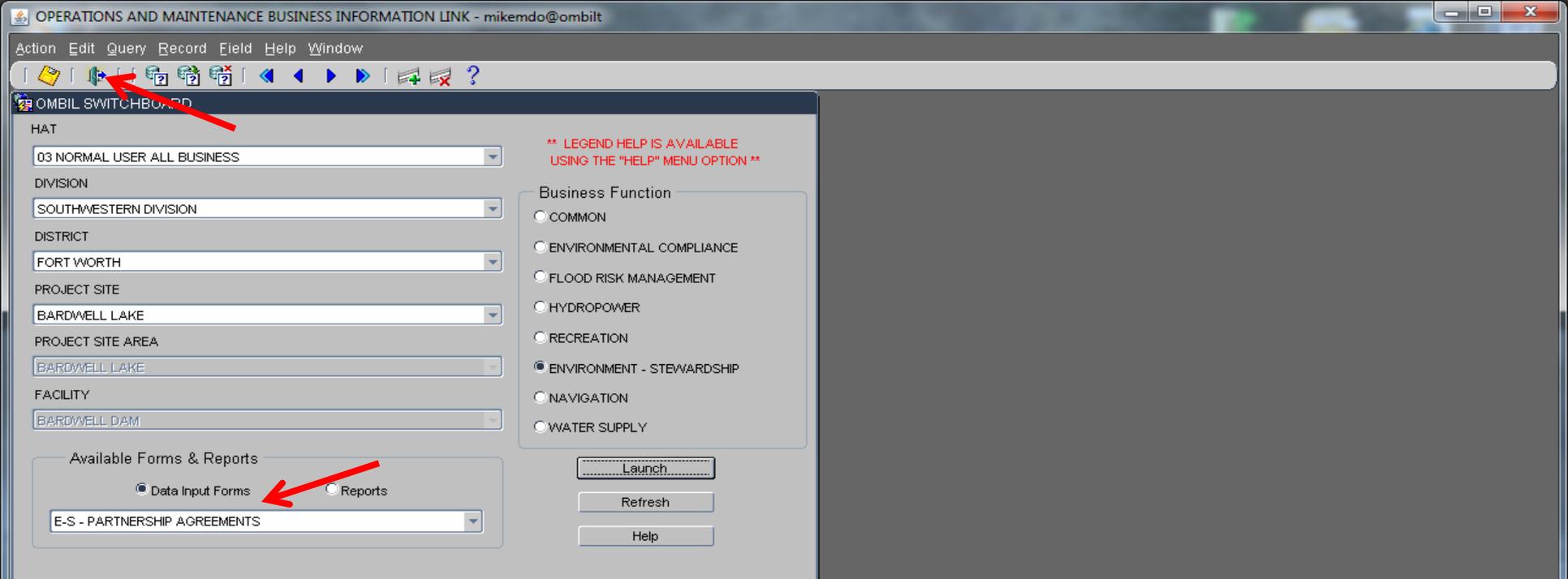
Organization	Partnership Type	Description	
QUAD CITY CVB	COOPERATING ASSOCIATI	ES - Test 2	...
American Chestnut Foundati	CHALLENGE PARTNERSHIP	ES Test 7	...
Cabellas	COOPERATIVE AGREEMEN	ES Test 3	...
Longfellow Middle School	MEMORANDUM OF UNDER	ES Test 4	...
Wal Mart	CONTRIBUTIONS PROGRAM	ES Test 8	...
Bee County	HANDSHAKE PARTNERSHI	ES Test 6	...
Environmental Protection Agt	ECONOMY ACT PARTNERS	ES Test 5	...
			...
			...
			...

<<BACK CREATE NEXT>>

The screen refreshes to **display only Active Agreements** that are active for the report FY. If you now see that an Agreement is missing, simply click the “Create” button and it will take you back through the creation process. Since we aren’t missing any, we will proceed by clicking the “Next” button to begin the data update process.



In this example, we have used the scroll bar across the bottom and all of the datafields have now been completed. For all of the update screens, the “Volunteer Rate” is pre-set and the “Value of Services”, “Total Partner Value”, and “Total Amount” are all calculated by the system and cannot be changed by the user. Click “Next” to continue the update.



Once you are back at the Switchboard, you may re-enter the Partnership Agreements wizard to make any last minute changes, Exit the system or continue on with another update.