CSIMS V2.0 & V2.1 Spring Workshop Handout

- 1. Open the CSIMS V2.0 training application link.
- 2. Login to CSIMS Training Site.
- 3. First time Login.
- 4. CSIMS V2.0 User Update Profile.
- 5. CSIMS V2.0 User Logout.
- 6. Calendar function.
- 7. New Home Page Charts function.
- 8. Favorites
- 9. Cost-Share Menu function.
 - a. Annual Program Setup
 - i. CS-2 District Program Setup
 - ii. CS-2 District Program Ranking Worksheet Setup
 - b. Annual Program Reports
 - i. CS-2 District Program Report
 - ii. Project Type Practice/Component Report
 - c. Ranking Worksheet
 - i. Ranking Worksheet Groups
 - ii. Ranking Worksheet for Individuals
 - iii. Ranking Worksheet Report
 - d. Ranking Worksheet Report
 - e. Landowner Information Table.
 - f. Landowner Report.
 - g. Contracts function.
 - i. Contract Setup and Payment.
 - ii. Encumbered Contract Setup and Payment.
 - iii. County Contract and Payment Read Only.

10. Buffer

- a. Buffer Admin
- b. Buffer Report
- c. Buffer Voucher Report
- d. Buffer Program Users Guide

- 11. Conservation Districts Menu function.
 - a. Employee Forms
 - i. Employee Information Form Hold
 - ii. Employee Oath Form
 - b. Employee Reports Hold
 - i. Employee Reports
 - ii. Employee Wage Report
 - c. Supervisor Forms
 - i. Supervisor Information Form
 - ii. Supervisor Election Results Form Hold
 - iii. Supervisor Oath of Office
 - d. Supervisor Reports
 - i. Result of Election Hold
 - ii. Supervisor Reports Hold
 - e. Kansas Conservation Districts
 - i. District Information Form.
 - ii. District Conservationist Information Form.
 - iii. Kansas Conservation District Directory.
 - f. Annual Meeting Form.
 - g. Annual Meeting Report.
- 12. Reports Menu Function
 - i. County Ledger Report
 - ii. CS-1 District Allocation Report
 - iii. CS-1 County Cancellation Report
 - iv. Voucher Report
 - v. Year End Report
- 13. Resources Menu Function.
 - a. CSIMS Users Guide Hold
 - b. Program Manual.
 - i. Chapter 1 Programs Overview.
 - ii. Chapter 2 General Policies and Guidelines.
 - iii. Chapter 3 Local Program and Contract Procedures.

- iv. Chapter 4 Practices and Components.
- v. Chapter 5 Livestock Waste Management Provisions.
- vi. Chapter 6 NPS Pollution Control Special Provisions.
- vii. Chapter 7 Irrigation Provisions.
- viii. Chapter 8 Riparian and Wetland Protection Program.
- ix. Chapter 9 Kansas Water Quality Buffer Incentive

c. Kansas Conservation District Handbook

- i. Administrative Section
 - 1) Division of Conservation Overview.
 - 2) Preface.
 - 3) Chapter 1 State Conservation Commission and Conservation Districts.
 - 4) Chapter 2 Conservation District Supervisors.
 - 5) Chapter 3 Board Meetings.
 - 6) Chapter 4 Conservation District Annual Meetings.
 - 7) Chapter 5 Financial Management.
 - 8) Chapter 6 District Operations.

ii. Personnel Section

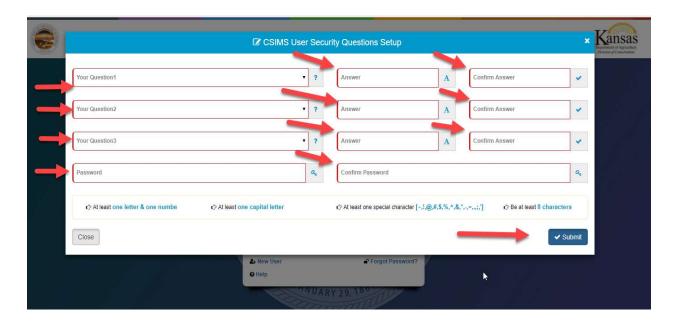
- 1) Chapter 1 Personnel Management Responsibilities.
- 2) Chapter 2 Determining Workload and Staffing Needs.
- 3) Chapter 3 Recruitment and Employment.
- 4) Chapter 4 Qualification Standards.
- 5) Chapter 5 Position Description and Performance Appraisals.
- 6) Chapter 6 Employee Compensation
- 7) Chapter 7 Employee Training.
- 8) Chapter 8 Employee Relations.
- 9) Chapter 9 Personnel Services.
- 10) Bibliography.
- iii. QuickBooks for Conservation Districts.
- iv. Kansas Conservation District Supervisors Handbook.
- v. NRCS/Electronic Field Office Technical Guide (eFOTG).
- vi. NRCS Practice Cost Data.
- vii. Helpful Links.

CSIMS V2.0 & V2.1 Training Users Guide

- 1. Open the CSIMS 2.0 training application link provided in the October 23, 2018 e-mail.
- 2. First time Login:
 - a. Use the work email address and your CSIMS password.
 - b. You will be directed to setup the security questions and new password.

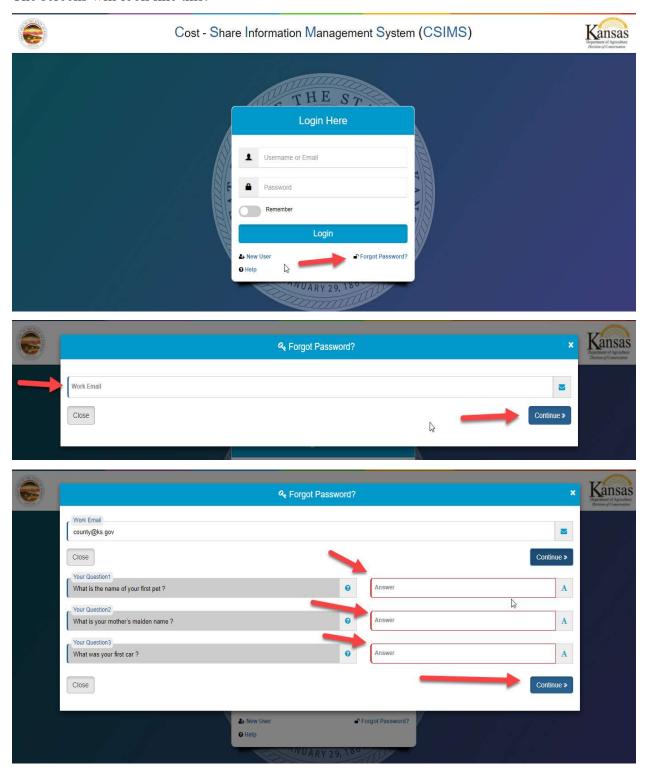
The screens will look like this:

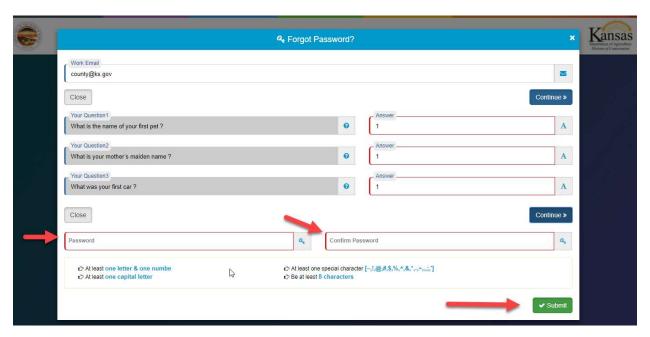




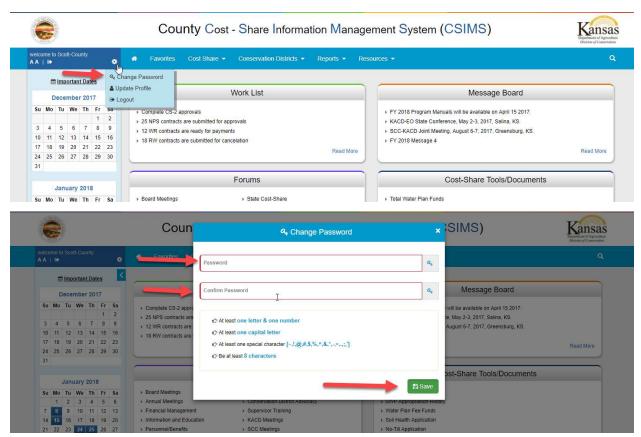
3. Forgot Password Function.

The screens will look like this:



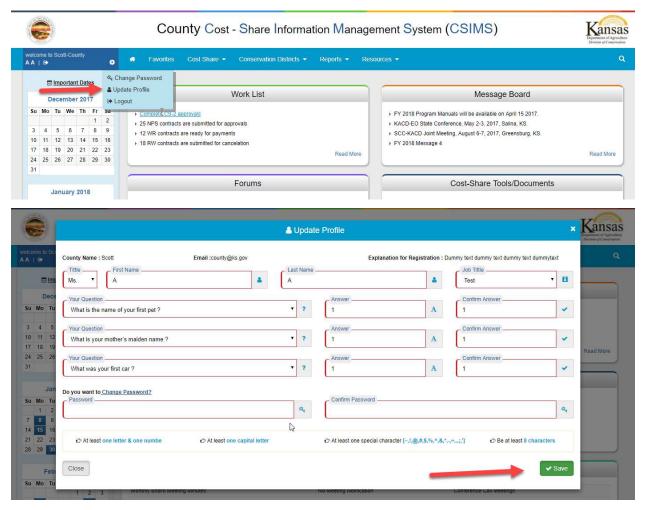


4. User Password Change Function. This can be performed after successful login to CSIMS. The screen will look like this:

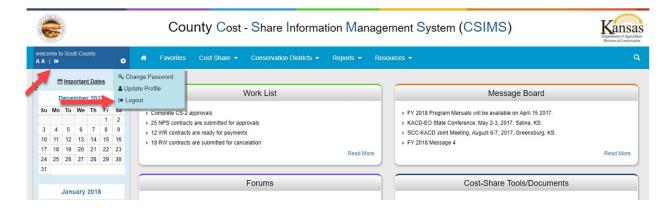


5. User Update Profile function. This can be performed after successful login to CSIMS. All security questions or password can also be updated here.

The screens will look like this:

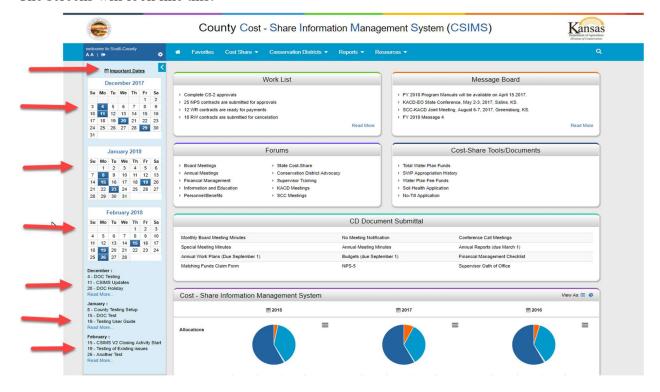


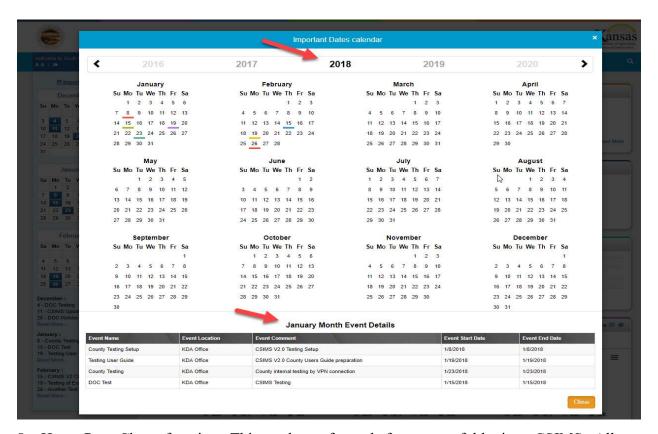
6. User Logout function. This can be performed after successful login to CSIMS. The screen will look like this:



7. New Calendar function. This can be performed after successful login to CSIMS. All events are entered by Division of Conservation (DOC) staff and can be displayed on the Home Page for three months (Previous month, Current month and Next month) period only. Click the Important Dates to see full year calendar and previous year events also.

The screens will look like this:

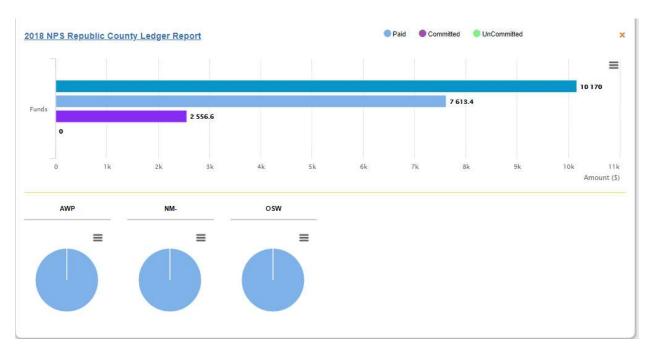




8. Home Page Charts function. This can be performed after successful login to CSIMS. All allocations for three years data will be displayed by Program and can be drilled down to details level. County Ledger report will also be available here. Data can be view as table or chart level.

The screens will look like this:





Clicking on the Project Type will give a list of contracts.

The screen will look like this:

2018NPSContract List				
County Name	County Contract Number	Paid Amount	Committed Amount	Actual Cost
Cloud	NPS-2018-6	\$0.00	\$195.00	\$0.00
Dickinson	NPS-2018-7	\$0.00	\$300.00	\$0.00
Finney	NPS-2018-2	\$0.00	\$750.00	\$0.00
Franklin	NPS-2018-1	\$0.00	\$1,000.00	\$0.00
Franklin	NPS-2018-3	\$0.00	\$315.00	\$0.00
Keamy	NPS-2018-2	\$0.00	\$1,000.00	\$0.00
Kearny	NPS-2018-3	\$0.00	\$1,000.00	\$0.00
Lane	NPS-2018-2	\$0.00	\$650.00	\$0.00
Lane	NPS-2018-5	\$0.00	\$373.75	\$0.00
Lane	NPS-2018-6	\$0.00	\$325.00	\$0.00

Click on the NPS County Ledger Report and the County Ledger will open in a pop-up. The screen will look like this:



9. Favorites function – Clicking on the Star beside any Menu Function will add here.

The screen will look like this:



Note – The CS-2 District Program Setup, Component Report, Contract Setup and Payment, Encumbered Contract Setup and Payment and the Landowner Report were chosen.

To remove an item from the Favorites unclick the Star.

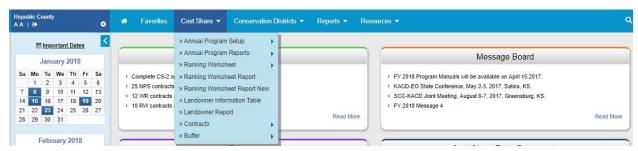
The screen will look like this:



Note – The CS-2 District Program Setup and Component Report was removed from Favorites.

10. Cost-Share Menu Function.

The screen will look like this:



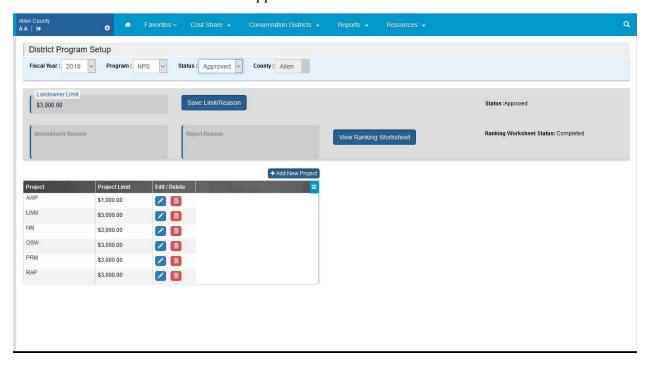
11. Annual Program Setup

The screen will look like this:



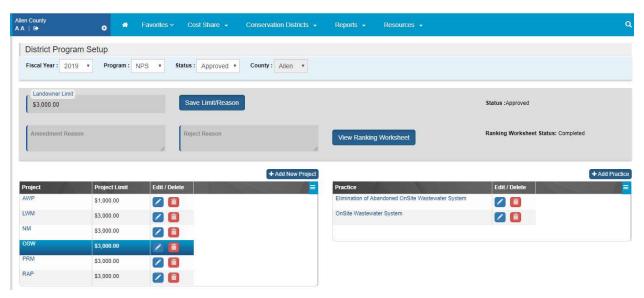
CS-2 District Program Setup

The screen will look like this for an Approved CS-2:



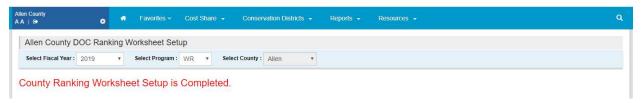
Clicking on the Project Type shows the Practices.

The screen will look like this:



CS-2 District Program Ranking Worksheet Setup.

The screen will look like this for a Completed Ranking Worksheet Setup:



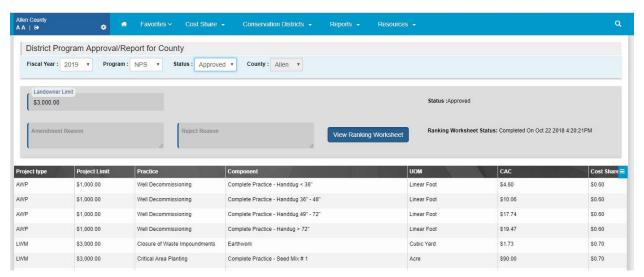
12. Annual Program Reports.

The screen will look like this:



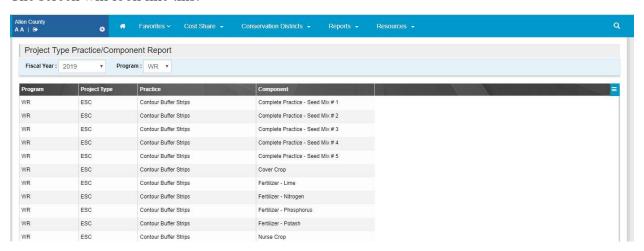
CS-2 District Program Report.

The screen will look like this:



Project Type/Practice/Component Report.

The screen will look like this:



13. Ranking Worksheet

The current screen will look like this:



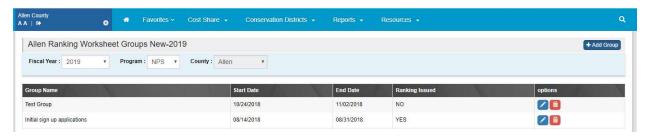
The final screen will look like this:



Note – Red lined out items will be removed.

Ranking Worksheet Groups New-2019

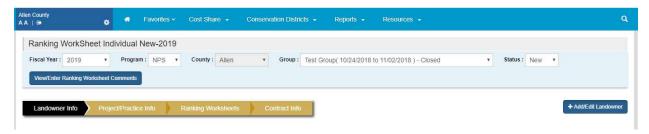
The screen will look like this:



Note – New-2019 will be removed.

Ranking Worksheet Individual New-2019

The screen will look like this:



Note – New 2019 will be removed and the colors will change.

Ranking Worksheet Report New – will be removed from this grouping.

Move Ranking Worksheet Form – will be removed.

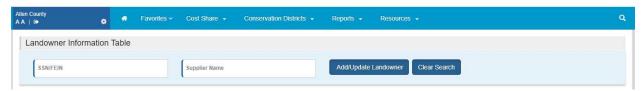
13. Ranking Worksheet Report

The screen will look like this:



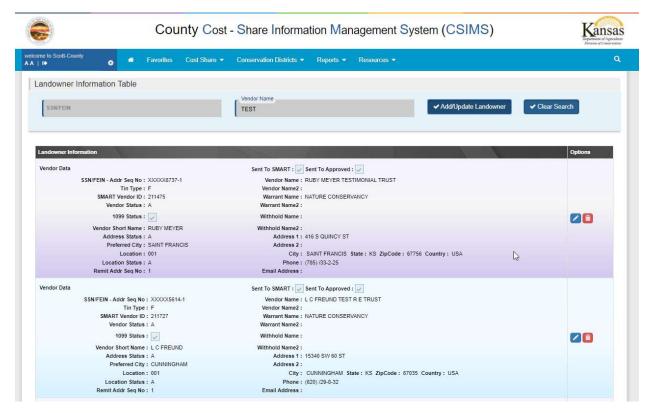
14. Landowner Information Table – Search can be performed from here and New Landowner can also be added from here.

The screen will look like this:



Note – Vendor Name has been replaced with Supplier Name.

The screen will look like this when a search has been entered:



Add a New Landowner:

Enter the SSN/FEIN in the box and click the Add/Update Landowner Button Click the Add/Update Landowner the screen will look like this:



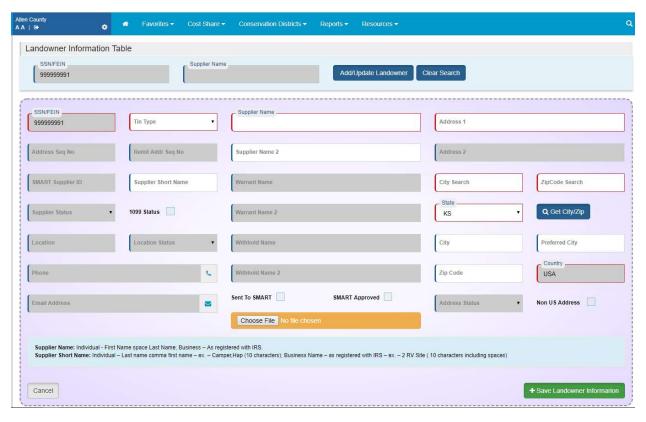
A pop-up will appear and you will need to click the Yes button.

The Add/Update Landowner Pop-up screen will look like this:



Clicking the Yes will bring the Landowner Information Form.

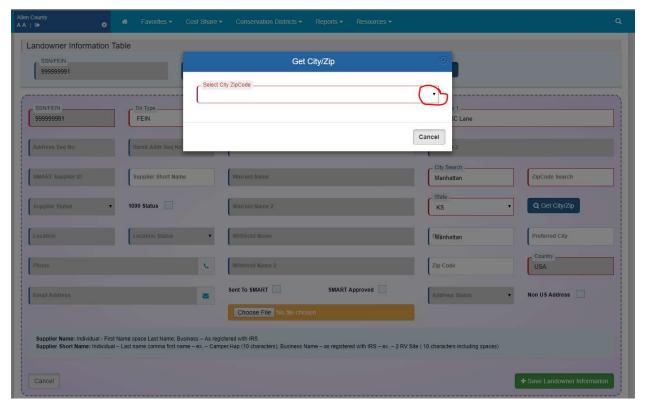
The Landowner Information Form screen will look like this:



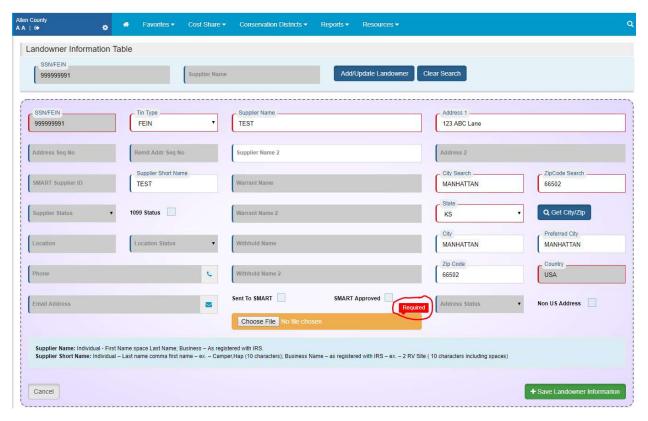
Enter the Landowner Information, Get City/Zip, Upload W-9 and Save Landowner Information.

Click on the down arrow and select the ZipCode.

The Landowner Information Table screen will look like this when Get/City Zip is clicked:

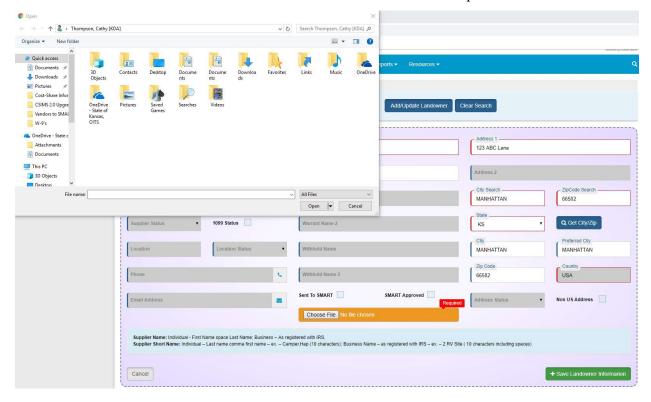


Clicking the Save Landowner Information Button without Uploading the W-9 Request for Taxpayer Identification Number and Certification will bring the error message of Required: The Landowner Information Table with error screen will look like this:

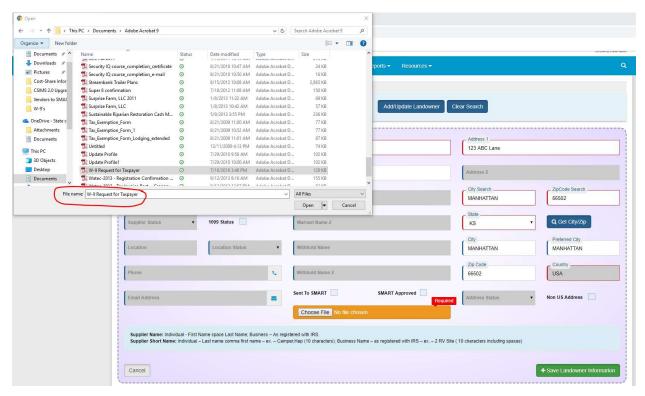


Click on the Choose File Button to Upload the W-9 Request for Taxpayer Identification Number and Certification.

The Choose File Button screen will look like this to select the file to Upload:

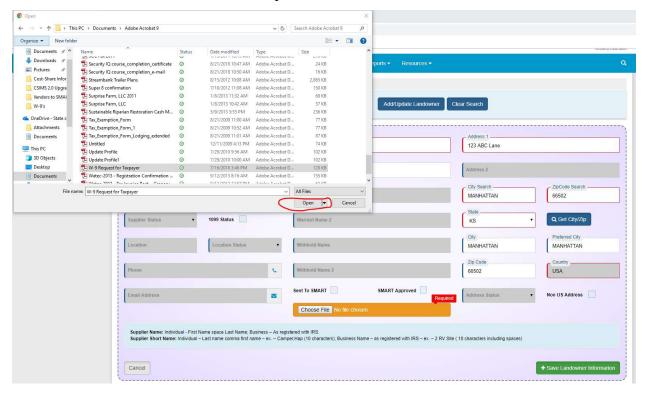


The search screen will look like this when a file has been chosen:



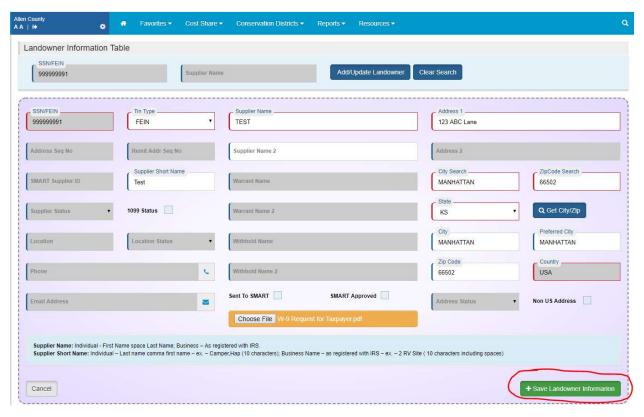
Click Open to Upload the file:

The search screen will look like this to Open the file:

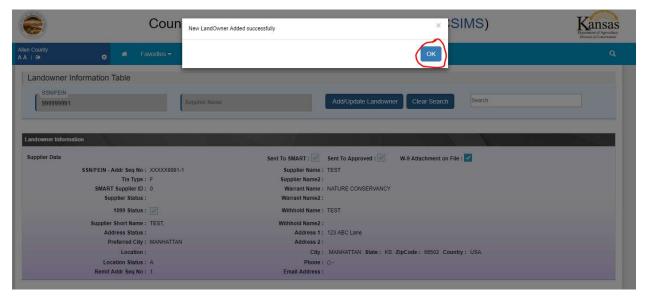


Note: Clicking on the Cancel will not upload the W-9 Request for Taxpayer Identification Number and Certification form.

The Landowner Information Table screen will look like this when the file has been uploaded and click the Save Landowner Information Button:

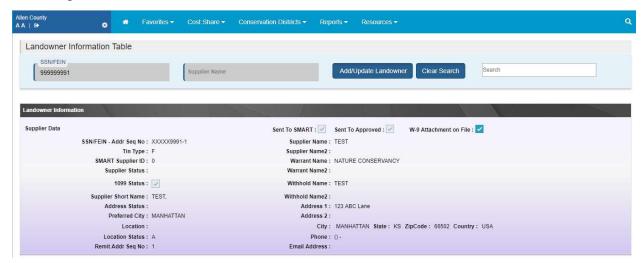


The Landowner Information Table screen will have a pop-up that will like this after Save Landowner Information has been clicked:



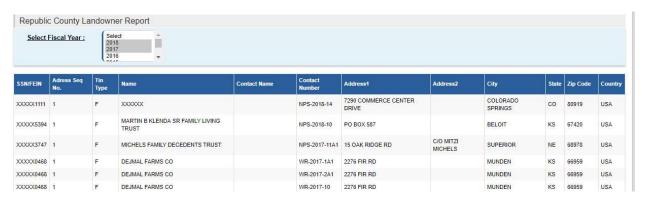
Note: Clicking Ok will close the pop-up.

The completed and saved Landowner Information form screen will look like this:



15. Landowner Report – Provides the landowner information that has been entered in CSIMS by your district.

The screen will look like this:



16. Contracts Navigation.

The screen will look like this:

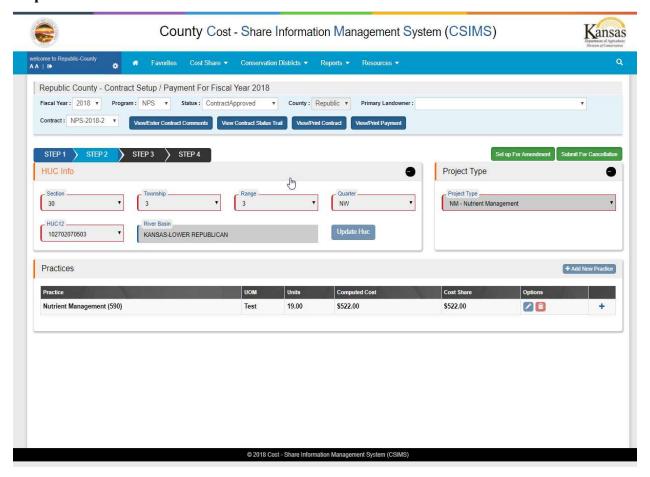


Contract Setup and Payment – New Contracts starting with Fiscal Year 2019 will be created from the Ranking Worksheet Report. Amendments, Cancellations and Payments will be created here.

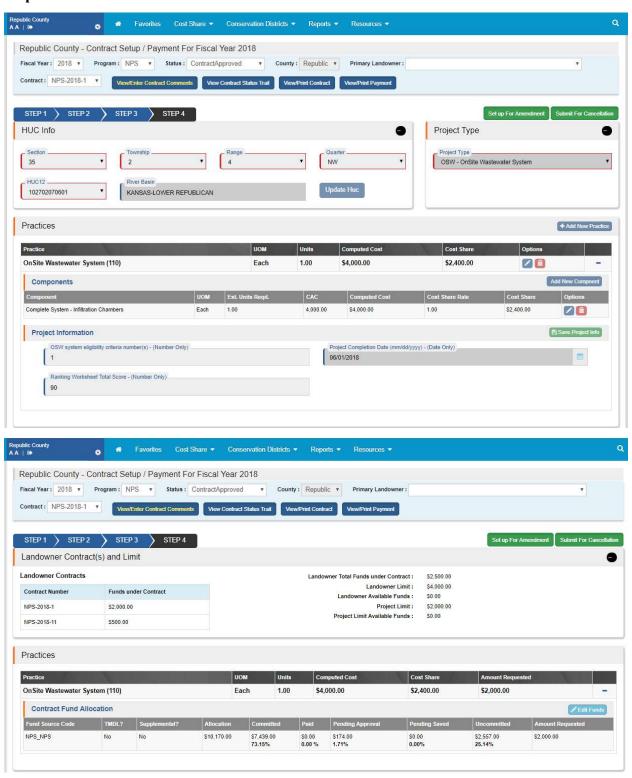
Step 1 the screens will look like this:



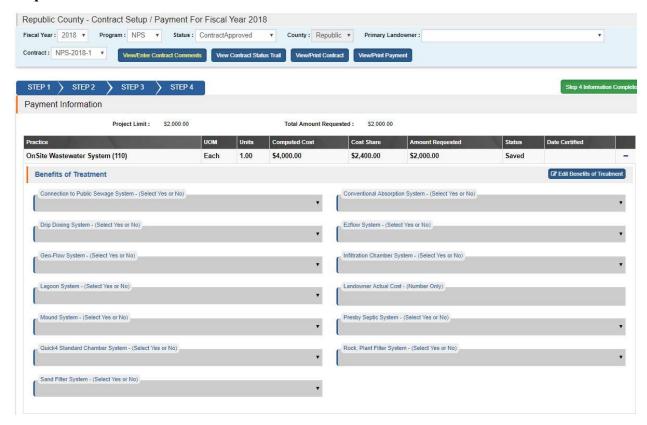
Step 2 the screen will look like this:



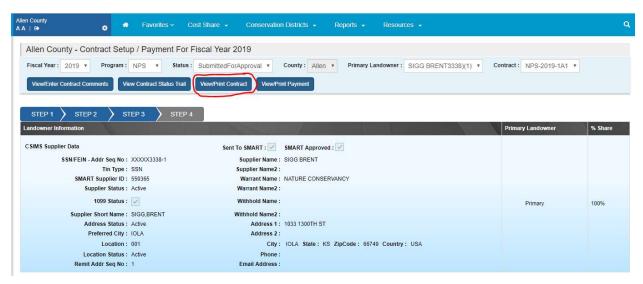
Step 3 the screen will look like this:



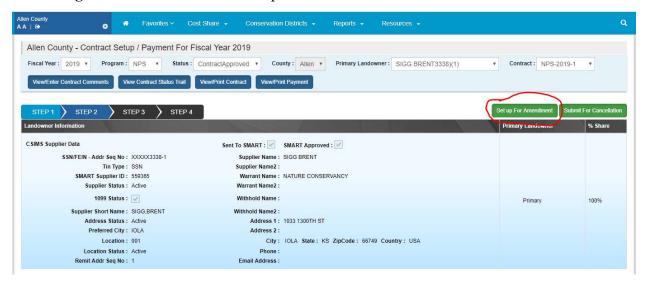
Step 4 the screen will look like this:



Printing a Contract. Click the View/Print Contract Button and another window will appear with the contract.



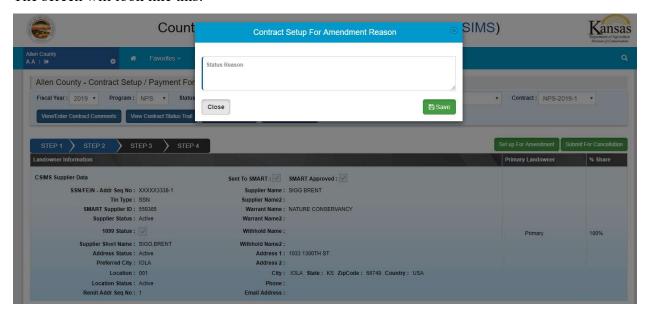
Amending a Contract – Click the Set up For Amendment Button.



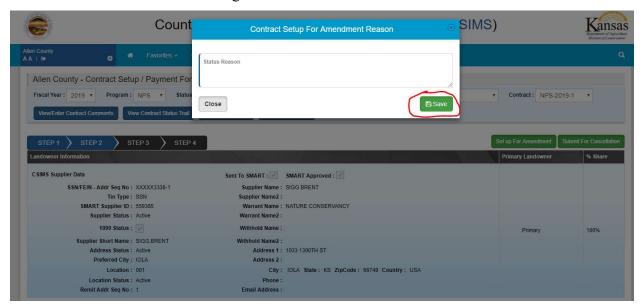
Note – the funds wills automatically reset when Set up For Amendment Button is clicked.

When the Set up For Amendment Button is clicked a pop-up will appear and you will need to enter the Status Reason for the Amendment.

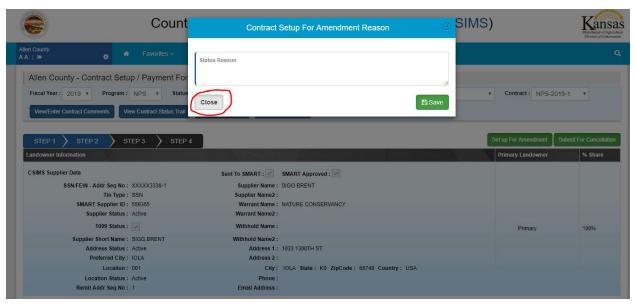
The screen will look like this:



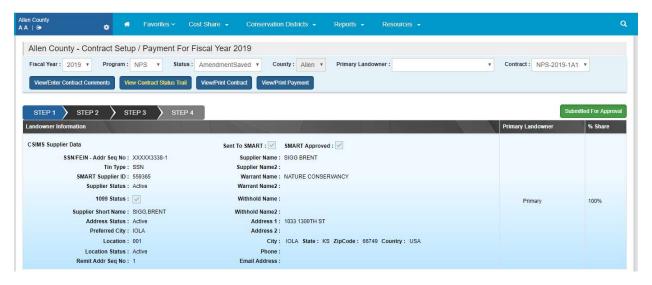
Click the Save Button after entering the Status Reason will create the Amendment.



Clicking on the Close in the pop-up will cancel the Amendment.

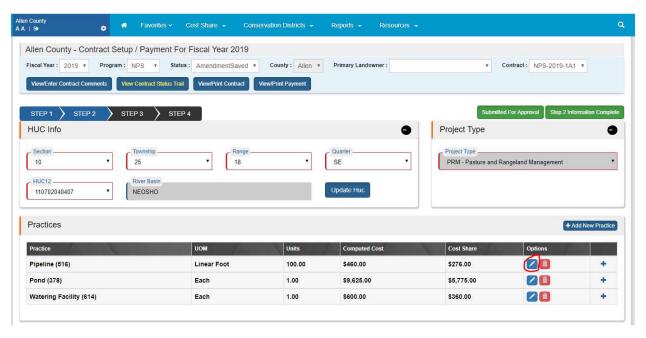


Step 1 Landowner Information the only information that can be changed here is the Primary Landowner and the % Share.

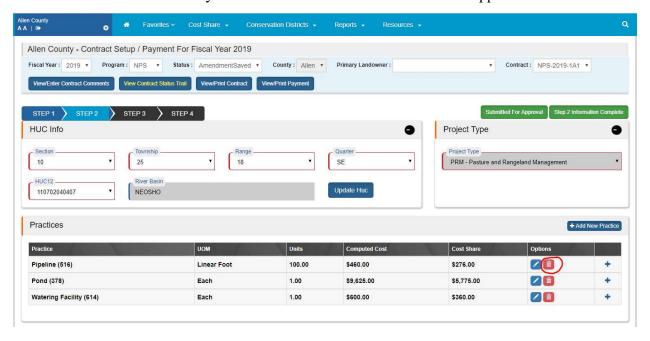


Step 2 Project and Component Information.

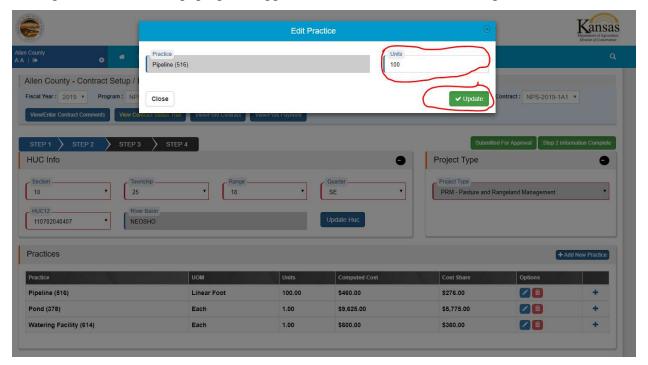
Edit the Practice Units click the Edit Button



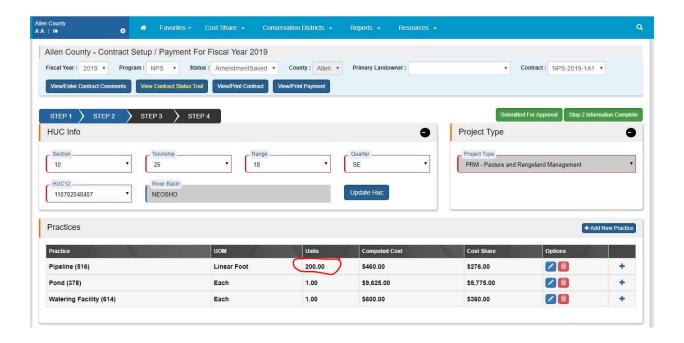
Delete the Practice Button only the DOC can delete a Practice from an Approved Contract.



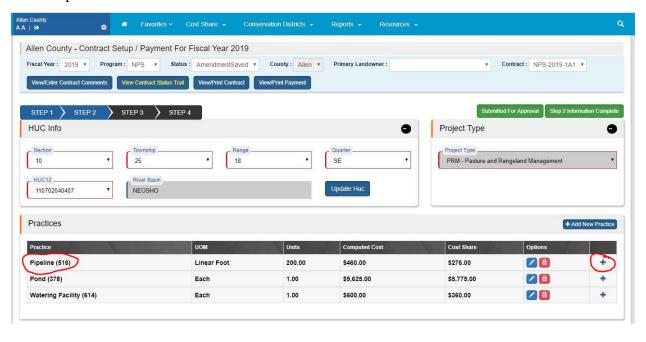
Editing the Practice Units pop-up will appear to enter the Units and click Update.



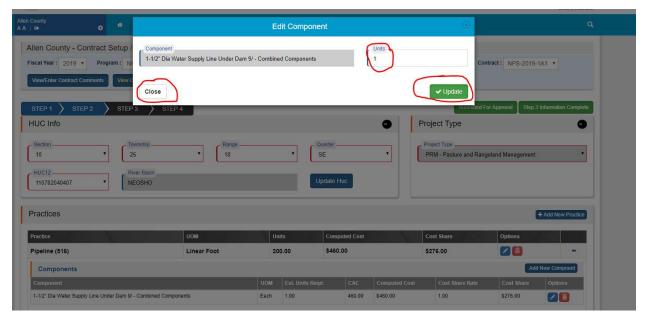
Units changed to 200 and Update clicked



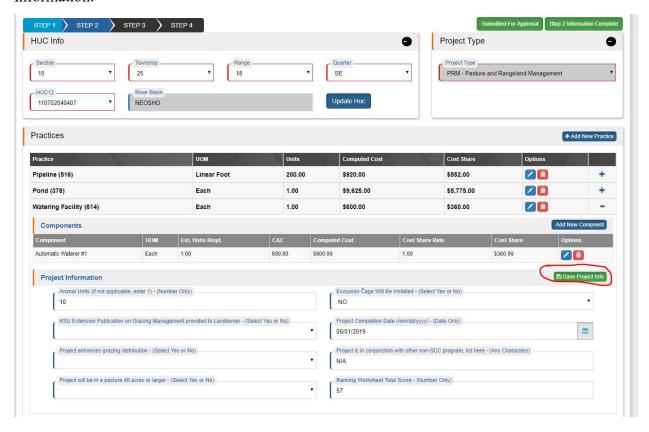
Editing Components. Click the Practice or the Expand Icon using either one will expand to show the Components.



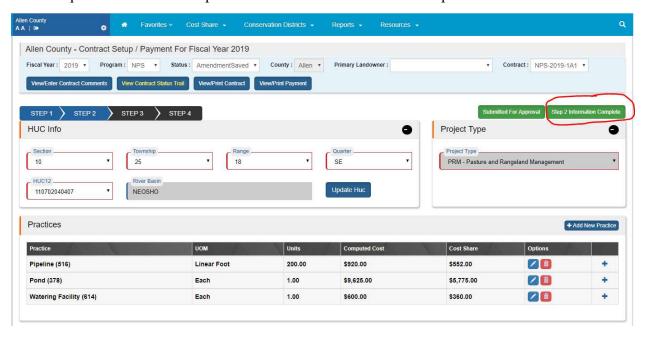
Click the Edit Icon and a pop-up will display to enter the Units. Enter the Units and click the Update Button. Clicking the Close Button will not Update the Est. Units Reqd.



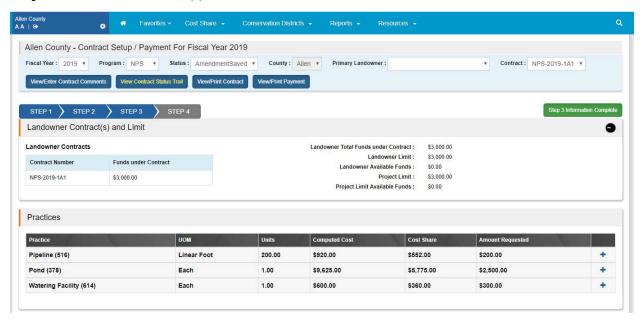
Editing the Project Information update the Project Information as needed and click Save Project Information.



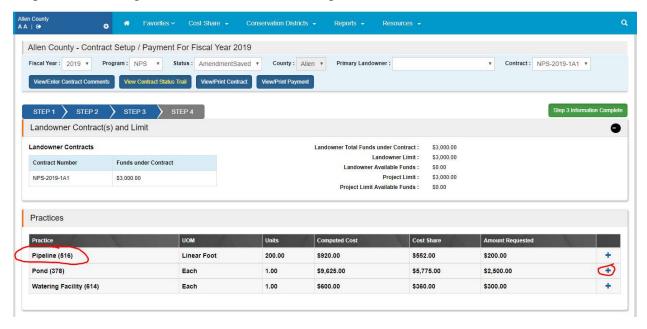
Click Step 2 Information Complete once all information has been updated.



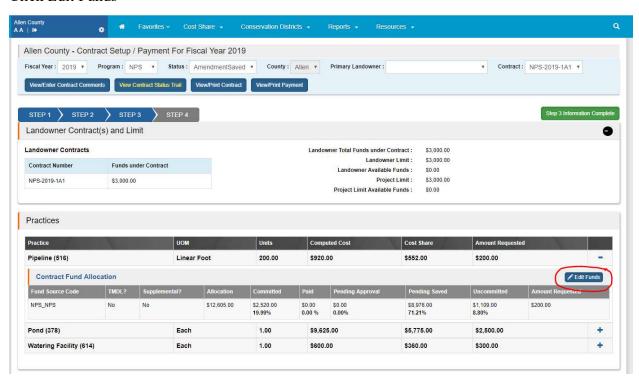
Step 3 Landowner Contract(s) and Limit.



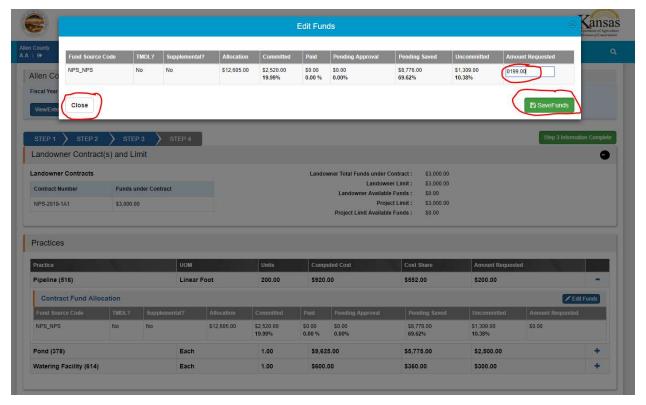
Step 3 Edit Funding. Click the Practice or the Expand Icon.



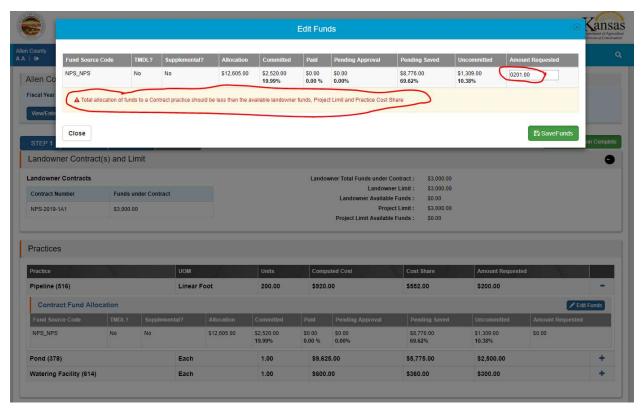
Click Edit Funds



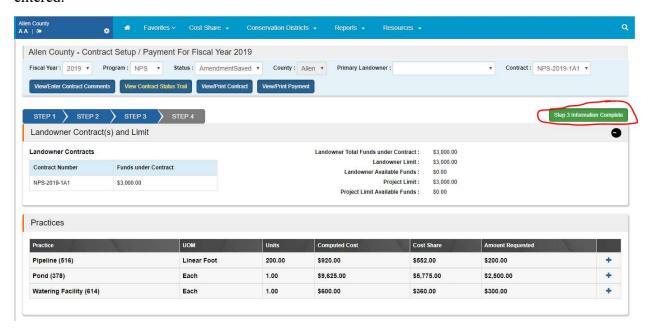
Edit Funds Pop-up enter Amount Requested and the Save Funds. Clicking the Close Button will close pop-up without Saving Funds.



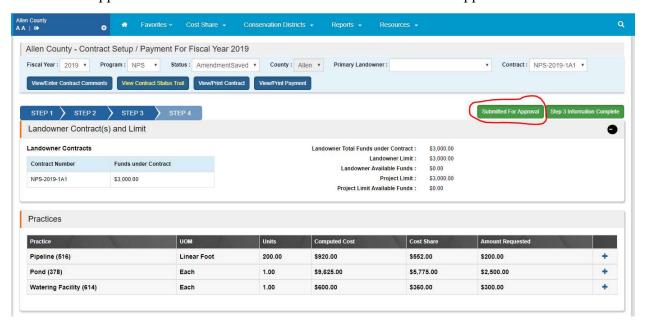
Edit Funds error message will appear when the Save Funds Button has been clicked if there is an error



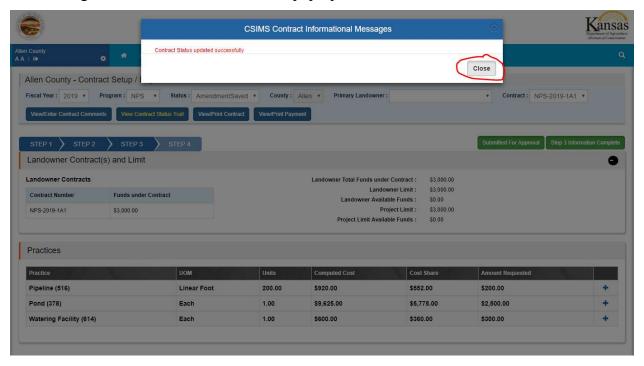
Step 3 Information Complete. Click the Step 3 Information Complete when all funding has been entered.



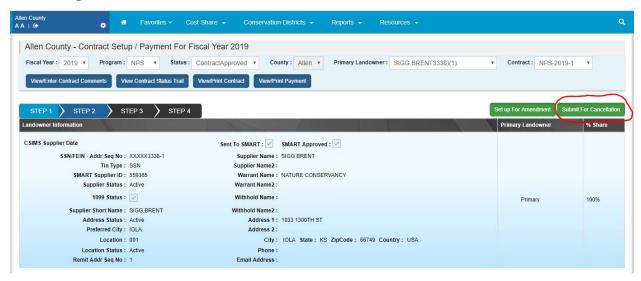
Submit For Approval to have the Amendment submitted to DOC for Approval.



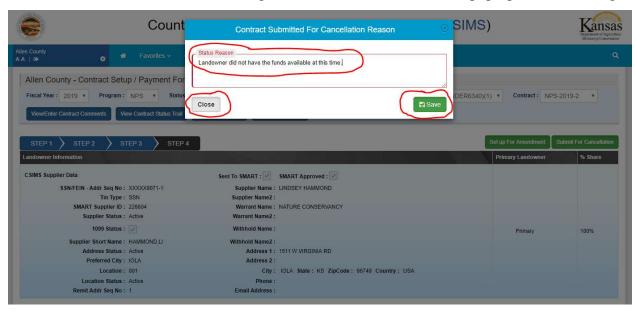
Submitted For Approval. Clicking the Submitted For Approval Button will bring this pop-up and clicking the Close Button will close the pop-up.



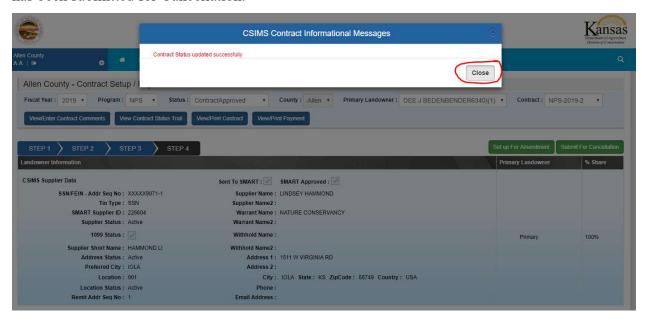
Cancelling a Contract – Click the Submit for Cancellation Button.



Clicking the Submit For Cancellation will bring the pop-up to enter the Status Reason. Enter the Status Reason and Click Save. Clicking the Close Button will close the pop-up without Saving.

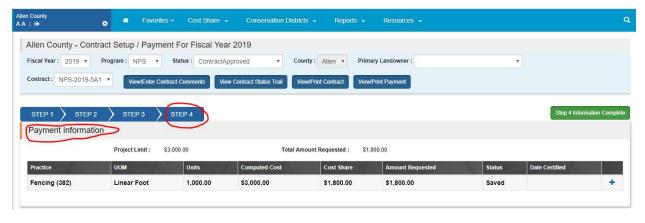


Clicking the Save Button will bring this pop-up that the Contract Status updated successfully. It has been submitted for Cancellation.

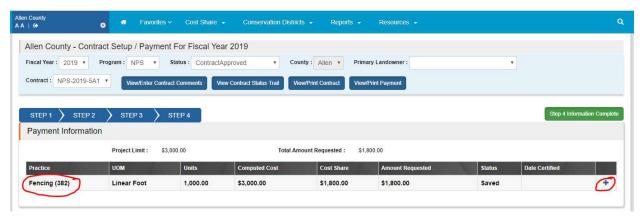


Submitting a Contract for Payment without an Amendment. Review Steps 1, 2 and 3 to make sure the information is correct.

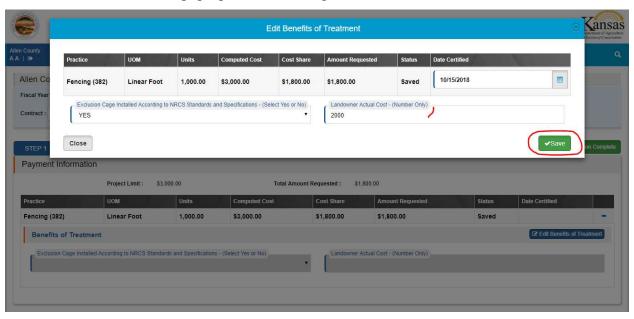
Step 4 Payment Information



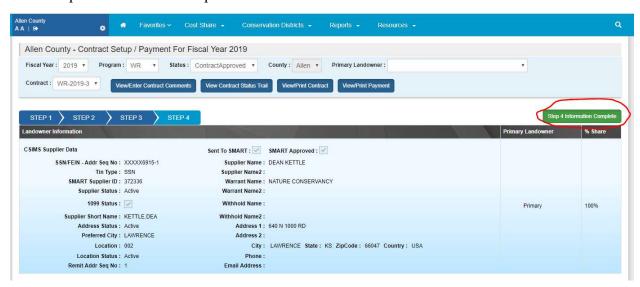
Click on Practice or the Expand Button to see Benefits of Treatment.



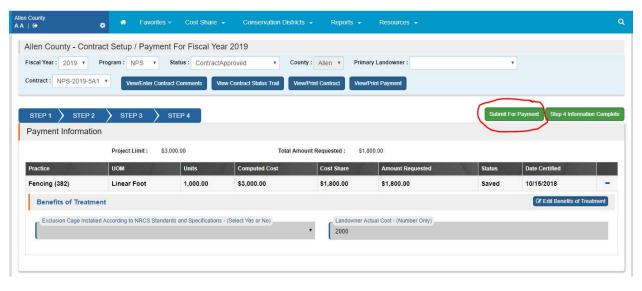
Benefits of Treatment. Enter the Benefits of Treatment information and click Save. Clicking the Close Button will close the pop-up without Saving.



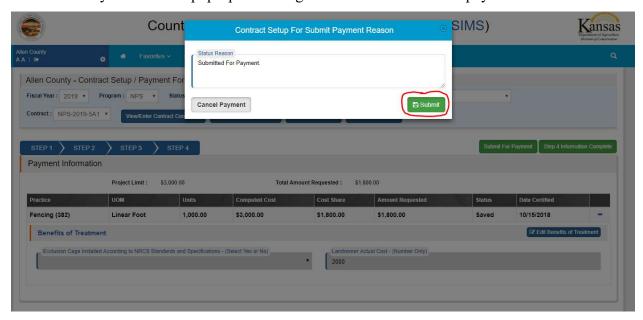
Click Step 4 Information Complete.



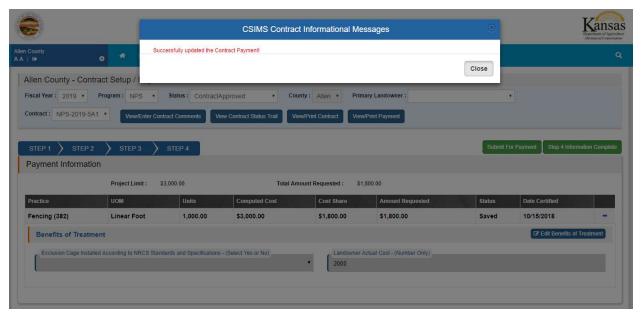
Click the Submit for Payment Button.



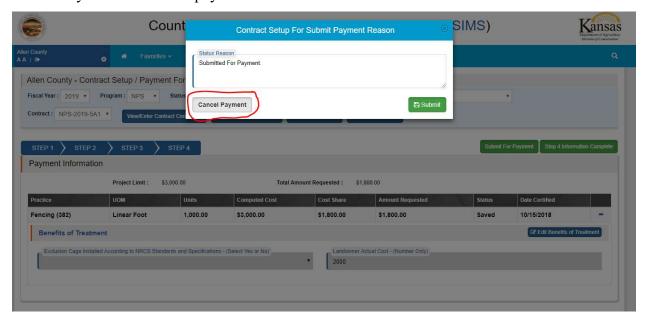
Submit for Payment Button pop-up. Clicking the Submit will send for payment.



Pop-up after clicking Submit.

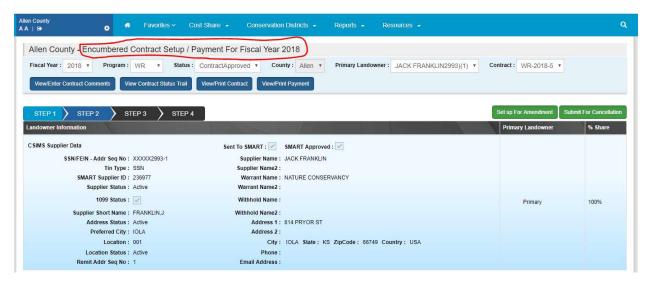


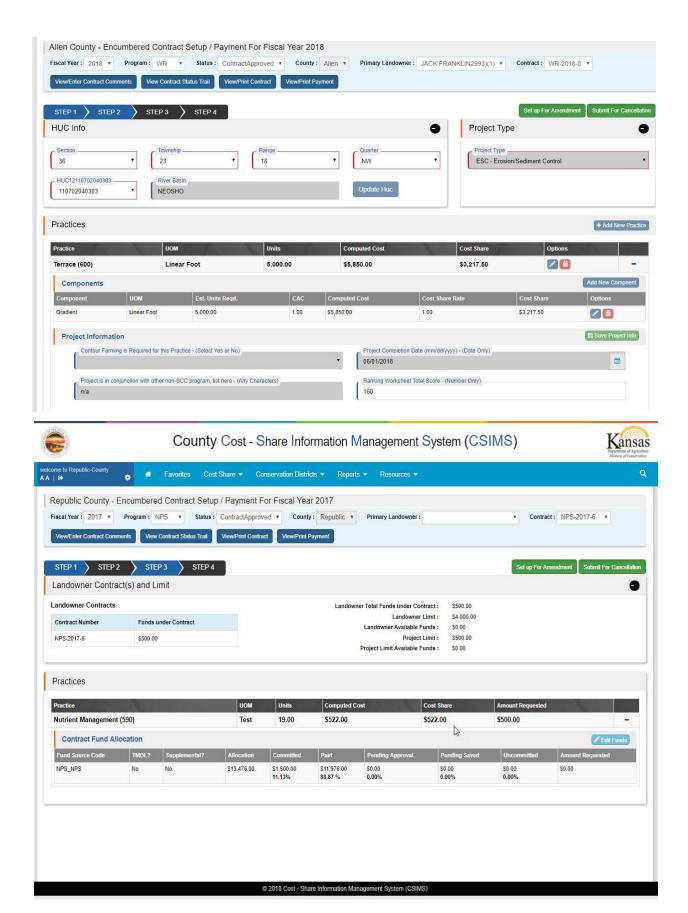
Cancel Payment cancels the payment.

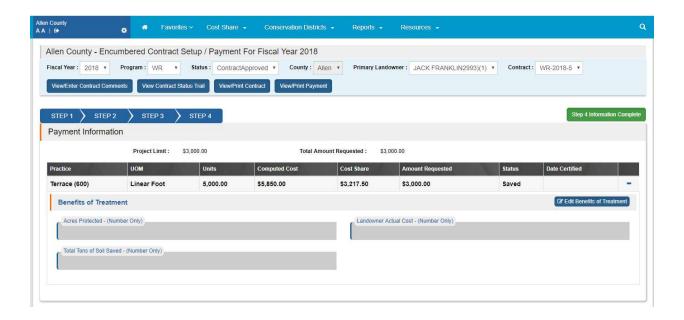


18. Encumbering Contract Setup and Payment. Prior Fiscal Year Contracts will be accessible here. Amending and Submitting a Contract for Payment are the same processes as outlined above.

The screens will look like this:



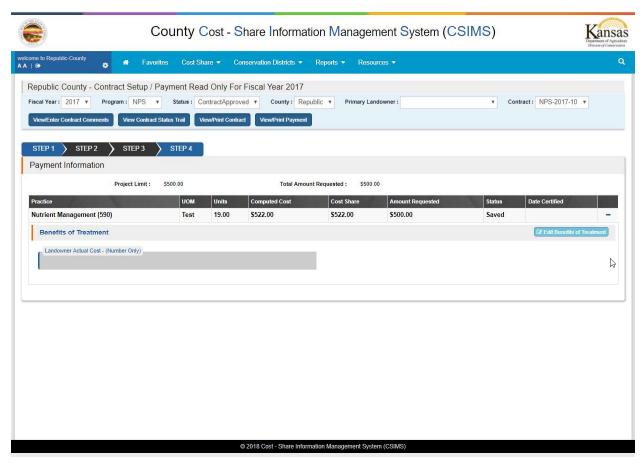




19. County Contract and Payment Read Only – This function can be used to access current status of each contract. However, once a Fiscal Year Program has been encumbered, this is used only to view and/or print Cancellation Approved and/or Final Paid status contracts.

The screens will look like this:





20. Buffer – Under Construction.

The screen will look like this:



21. Conservation Districts Menu.

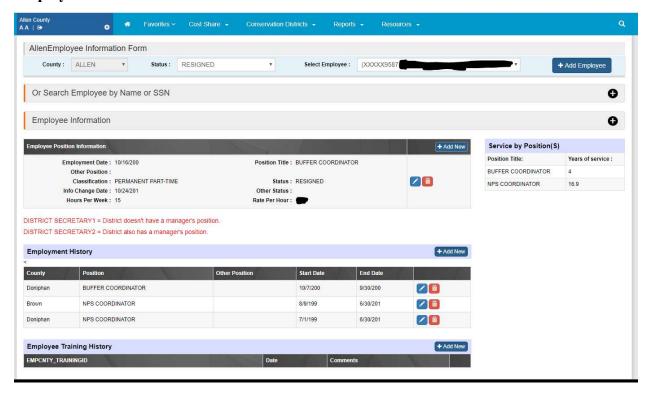
The screen will look like this:



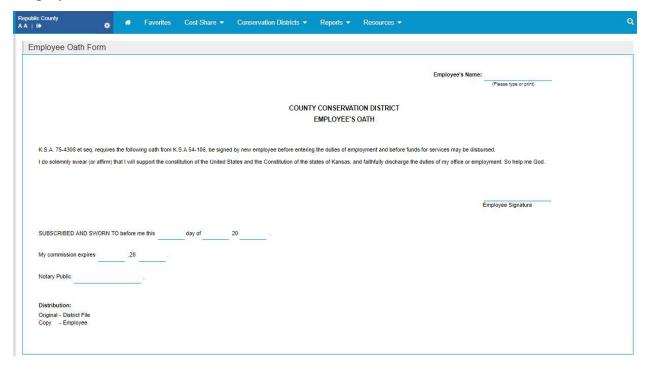
22. Employee Forms – Conservation District employee database to provide the district an employee record keeping tool and to generate a printable employee oath to be completed by each new employee.



Employee Information screen will look like this:



Employee Oath screen will look like this:

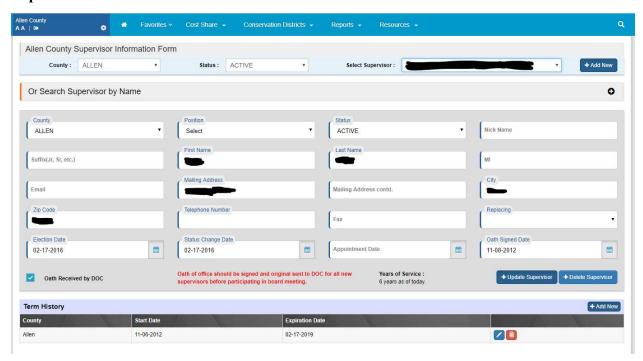


- 23. Employee Reports Under Construction.
- 24. Supervisor Forms A conservation district database to provide the district a supervisor record keeping tool for Supervisor Information, Supervisor Election Results and Oath of Office forms.

The screens will look like this:



Supervisor Information screen will look like this:

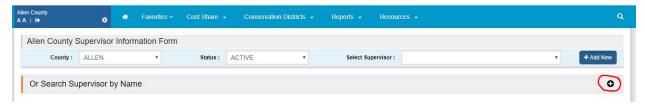


Adding a New Supervisor. When a New Supervisor has been elected you should first do a name search to make sure that they are not already in the database.

The Search Function screen will look like this:



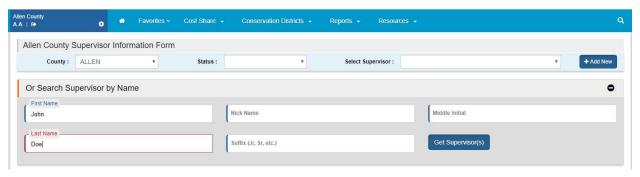
Click on the Or Search Supervisor by Name or Expand Icon to see the search fields.



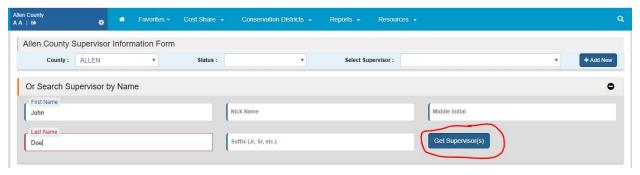
The search screen will look like this after expanding:



The search screen will look like after entering First Name and Last Name:

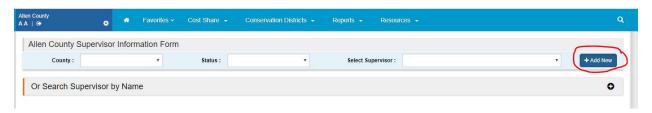


Click the Get Supervisor(s) Button:



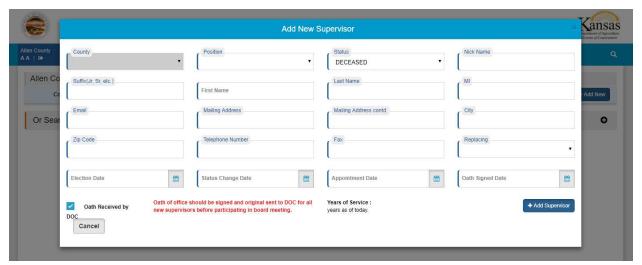
Click the Add New Button if you do not get any results from the search.

The screen will look like this:



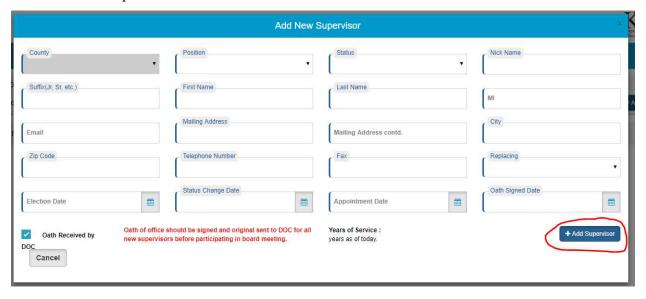
A pop-up will for Add New Supervisor will appear.

The screen for Add New Supervisor will look like this:

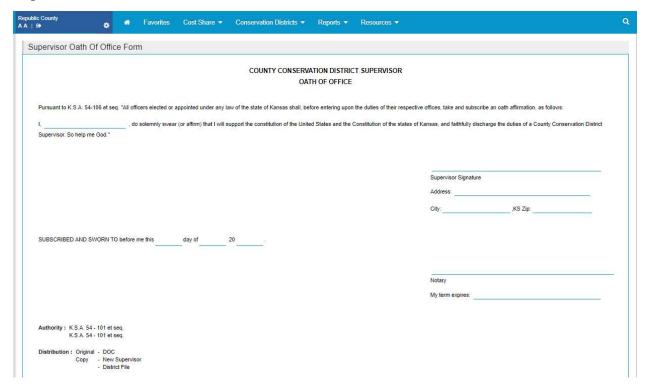


Click the Add Supervisor Button.

The Add New Supervisor screen will look like this:



Supervisor Oath of Office screen will look like this:



25. Supervisor Reports – Under Construction.

The screen will look like this:

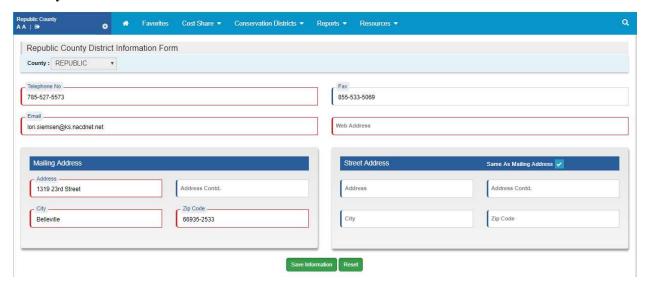


26. Kansas Conservation Districts is used to generate the Kansas Conservation Districts Directory.

The screen will look like this:

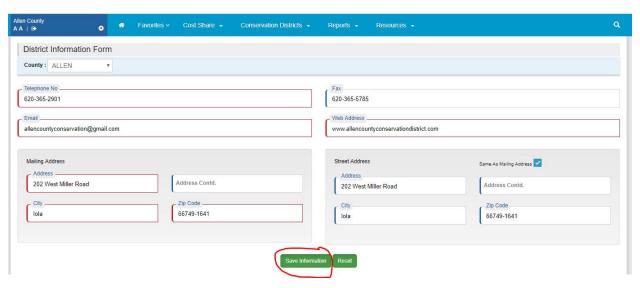


County District Information Form screen will look like this:



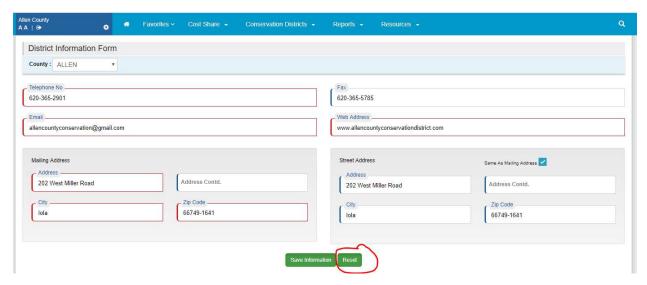
To update form enter the new information and click Save Information Button.

The Save Information Button on the District Information Form screen will look like this:

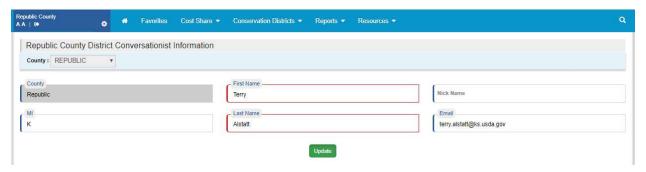


Clicking the Reset will clear the form and all information will have to be re-entered.

The Reset Button on the District Information Form will look like this:

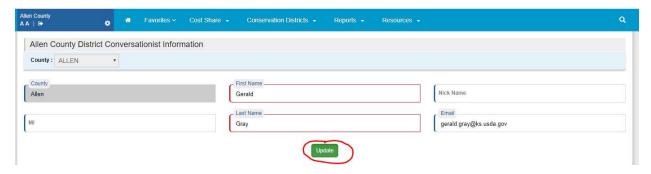


District Conservationist Information Form screen will look like this:



Update the Information and click the Update Button.

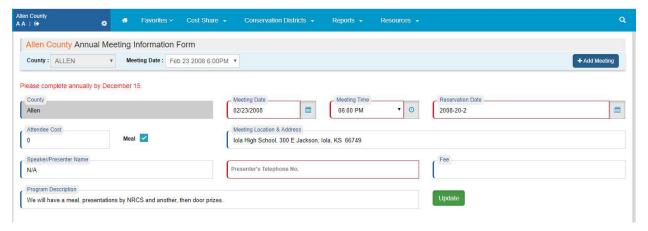
The Update Button on the District Conservationist Information Form screen will look like this:



Kansas Conservation District Directory – Under Construction.

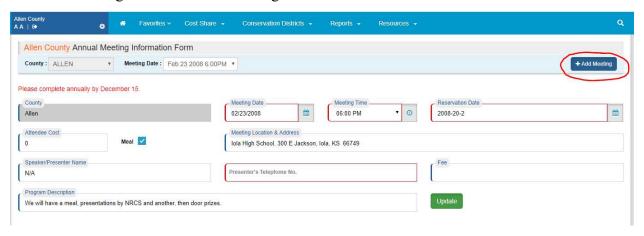
27. Annual Meeting Form the function is used to enter the Annual Meeting Information annually by December 15th.

The screen will look like this:



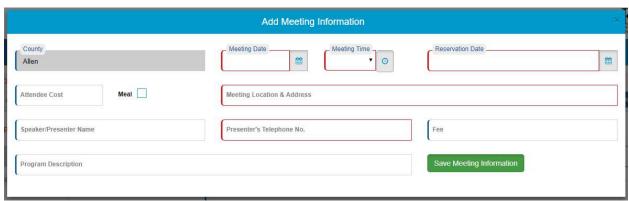
Click the Add Meeting Button to add a new meeting.

The Add Meeting Button Annual Meeting Information Form screen will look like this:



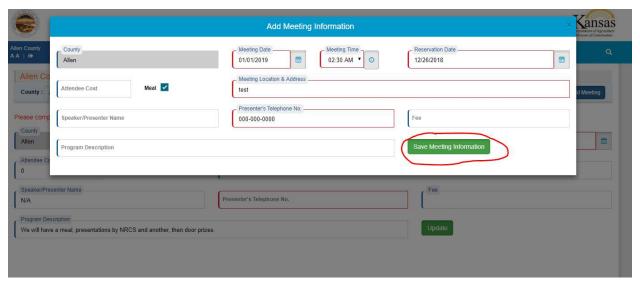
The Add Meeting Information pop-up will appear to enter the meeting information.

The pop-up for the Add Meeting Information screen will look like this:

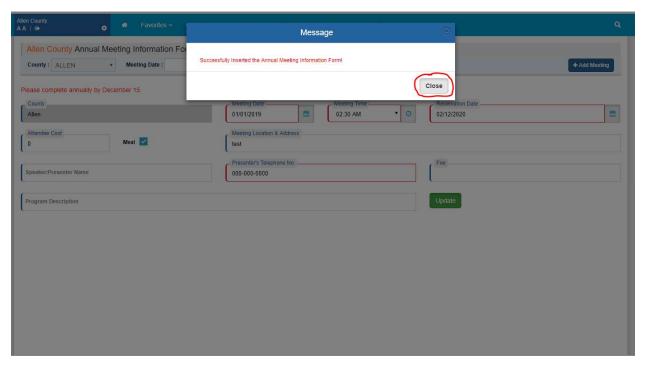


Enter the information and click Save Meeting Information Button.

The Save Meeting Information Button screen will look like this:



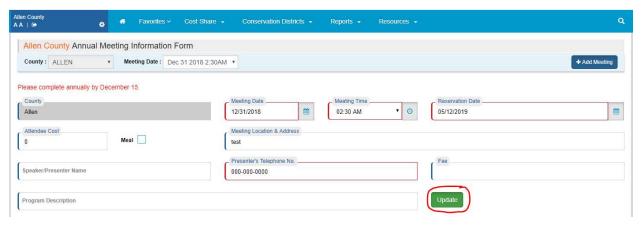
The Add Meeting Information form will look like this after Meeting Information Button has been clicked:



Clicking the Close Button will close the pop-up.

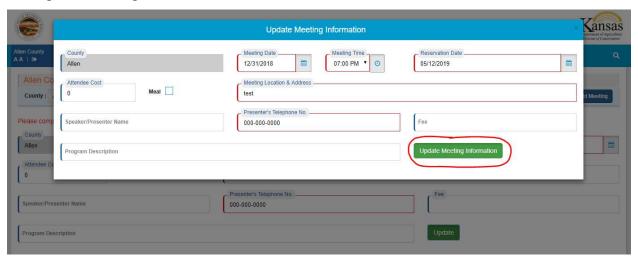
Updating the Annual Meeting Information Form after meeting has been added.

The Update Button on the Annual Meeting Information Screen will look like this:



Enter the information that needs to be corrected and click the Update Button.

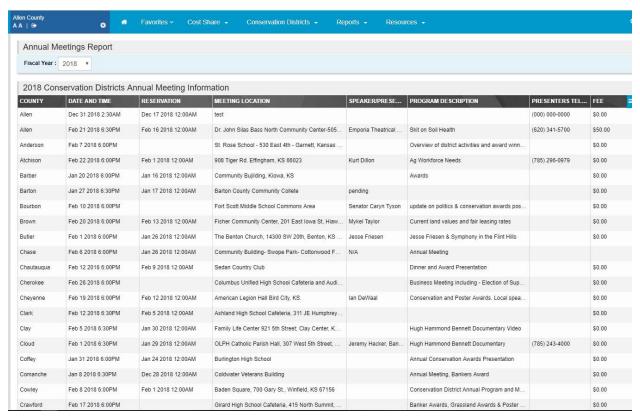
The Update Meeting Information screen will look like this:



Clicking on the Update Meeting Information Button will update.

28. Annual Meetings Report.

The Annual Meetings Report screen will look like this:



29. Reports Menu Function.

The screen will look like this:

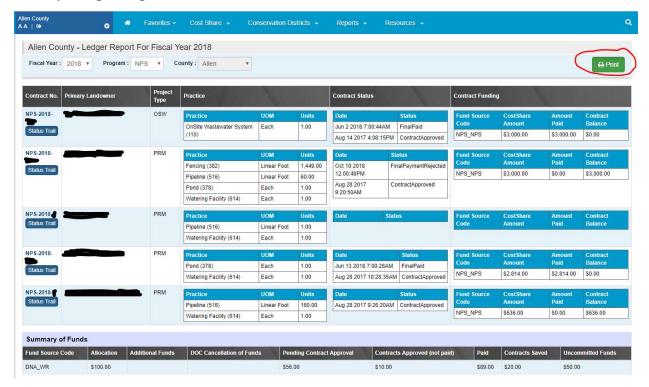


County Ledger Report search screen will look like this:



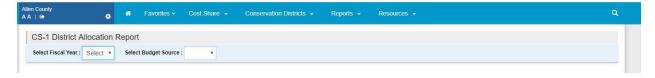
Select the Fiscal Year and Program from the Drop Down selections.

County Ledger Report screen will look like this:



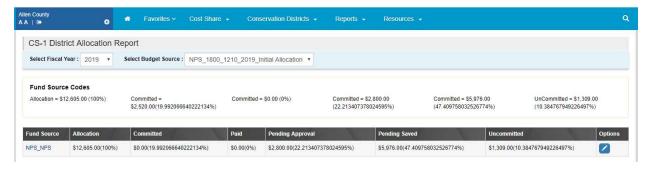
Clicking the Print Button will print the County Ledger Report.

CS-1 District Allocation Report screen will look like this:



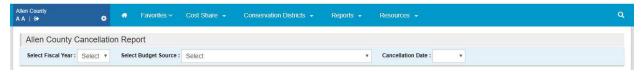
Select the Fiscal Year and the Budget Source.

The CS-1 District Allocation Report screen will look like this after the selection:



CS-1County Cancellation Report

The selection for the CS-1 County Cancellation Report screen will look like this:



Select Fiscal Year, Budget Source and Cancellation Date.

The CS-1 County Cancellation Report will look like this after selection: - Under Construction.

Voucher Report – Under Construction.

Year End Reports – Under Construction.

30. Resources Menu Function.

The screen will look like this:



CSIMS Users Guide – Functioning but is not the CSIMS 2.0 Users Guide.

Programs Manual. Starting in Fiscal Year 2020 the Programs Manual will be one single document.

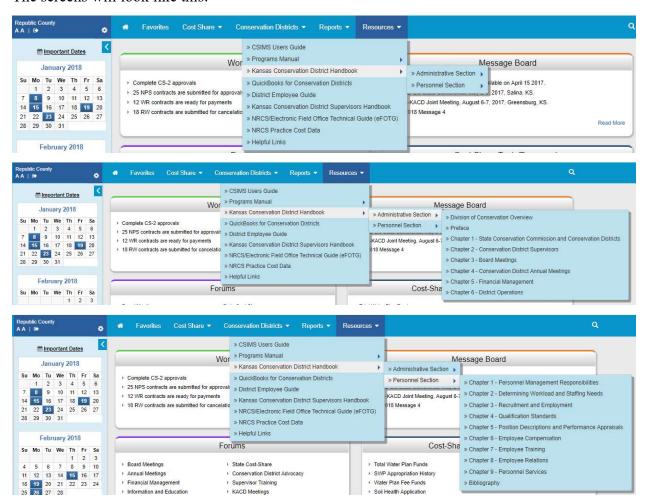
The screen will look like this:



Kansas Conservation District Handbook. Starting in Fiscal Year 2019 the Kansas

Conservation District Handbook will be one single document.

The screens will look like this:



QuickBooks for Conservation District – Clicking on the link will open document in a separate window.

Kansas Conservation District Supervisors Handbook
NRCS/Electronic Field Office Technical Guide (eFOTG)
NRCS Practice Cost Data
Helpful Links – Under Construction.