

**Stewardship Contracting Information Database
Version 2
Creating and Editing Activity and Financial Records**

Now we've got the basics of the contract information entered, we've got the project Contract and Bid Items entered for the contract. So we're ready for the contractor to begin working and get started from there.

There's two ways to enter -- let me go back. Activity records are used to track contract progress as far as units completed, and financial records are used to keep track of monetary changes and those kinds of things. We'll talk about that.

There's two ways to enter activity and financial records. The old way, it still can be done, it's a little bit cumbersome the way we did it in SCID 1.0, is you go down to the Project then you go into the Edit Mode, you go into the Contract, Phoenix contract, and then you go into the Bid Items, you expand that, and then you go into the individual bid item that you're entering the activity records for.

That's the Bid Item. And now we want to go into Activity Records. It says that there are no documents found so we want to create an activity record. And this is -- let me pull this down, this is the activity record data entry screen where you enter the date the service work was accepted and the unit service units accepted.

I think we've got an easier way to do that than what we used to do. Let me cancel out of here and go back to the main screen. Sometimes we'll get these messages and then we just pushed the Back button. Generally those are generated when you're going through the database too quickly and we get frustrated about it takes too long to do something. That's generally what brings those kind of screens up so you have to really wait for it to do what it's supposed to do.

Now we're back to the opening screen and if you were to login to SCID, this is the screen you'd come up to first. Rather than to drill down through that to the bid items, you've got a button here that says Create Activity and Financial Records. So we want to do an activity record. And then you want to drill into the particular project and then the contract and then the bid item that you want to enter this for.

So you can see this is the same bid item forms. So we're going to say that on July 14, 25 units were accepted. You've done the inspections and you've accepted that. So you want to save that. And then we close out of here. And then you go back to the main screen and you want to enter another activity record. This would be for the product side. You did one for the service side now you're doing one for the product side. The date that the products were removed, again go back to July 14 and there is the products were measured in terms of acres so this was -- 25 acres of product have been removed. So we want to save that. And then you close that. You go to the main menu. Right now what I'm going to do is I'm going to drill into the bid items just to make sure that the information we just -- the activity records we

just recorded are correct. And you can see that I didn't have to go into the edit mode just to go into the bid items. And then what you see here is that you've got the thinning or the service worked 25 acres is completed and 25 acres of product have been removed. So you can see that you have \$3,125 of service were completed and \$250 worth of product. So at this point in time we've decided to pay the contractor \$2500. That's not the entire balance that's left if you subtract these two, but that's what he's asked for in a request.

What we'll do is go back to the main screen again and instead of drilling through, we're just going to enter a financial record.

This would be for the thinning work that we're doing and he's asked for \$2500. Again, the payment date will be on the – let's say this was actually on – the work was completed say on the 14th and he asked for this, we're going to pay him on the 25th. And this is Invoice Number 1A. And here we are making a cash payment to the contractor so that radio button is selected. If we were just documenting that he'd earned the stewardship credits we would be selecting that radio button. So from there we'll save. And we'll close out of here. And then return to the main menu.

So what we've done is we've entered a Service and a Products Activity Record and then we also entered a Financial Record. Say that we discovered going through a record in the notes we have that actually 25 acres of thinning had been done instead of -- or 30 acres of thinning had been done instead of 25 and we wanted to edit that particular activity record. So we would -- again we have to drill into -- we're going to edit this because we're going to change it, so you need to go into the Edit Mode. And then we go into Contract Data. It's a little bit cumbersome to do this, you'll get used to it. So we're going to edit. We're going to edit this particular -- nope, we're not there yet. So we need to go into the Edit mode into the Activity Records, and it shows Activity Record Three. That's one we just did. And it shows that the 25 acres is being done. So what we want to do is we want to edit that. Instead of 25 acres we have 30 acres. So we want to save that. Then we want to close that. And we want to save and close this. It must not have recorded correctly because we changed that to 30 but that is what we did. So we want to save and close out of here. Going too fast again. It's one of the things that happens. Save and close out of here.

So we've showed you the basics of using the SCID database. This is how you enter the data into the Project level, the Contract level, the Bid Item level, an Activity and Financial Records. It's a lot of work to get there but once we get all that information entered you can use the reports to view how the displayed data out of the database. So that's what we will discuss next is Create Reports.