Stewardship Contracting Information Database

Version 2

(SCID_v2)

User Guide

National Operations Center
Division of Resource Services
Bureau of Land Management

October 2008

Stewardship Contracting Information Database
User Guide

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Changes from SCID 1.0

1) Projects and contracts have been separated. The hierarchy is now Project/Contract/Bid Item/Activity & Financial records. In addition there can be more than one contract under a project. This allows for IDIQ contracts where several task orders (individual contracts) are issued under an umbrella contract (project).

2) The POC for a contract is assigned at the contract level not the project level.

3) Activity and Financial records can be entered from the opening page without going through the Project/Contract/Bid Item layers.

4) Project and Contract Status **(titles?)** have been changed to reflect the language actually used in contracting.

5) Required fields are tied to Project/Contract status. As the status changes the required fields change.

6) Field have been rearranged and renamed to better reflect the contracting process.

7) Several new reports have been added.

1.0 Introduction

1.1 Users

This User Guide was developed for a variety of users, reflecting the multi-functionality of the Stewardship Contracting Information Database, known as SCID. The users include:

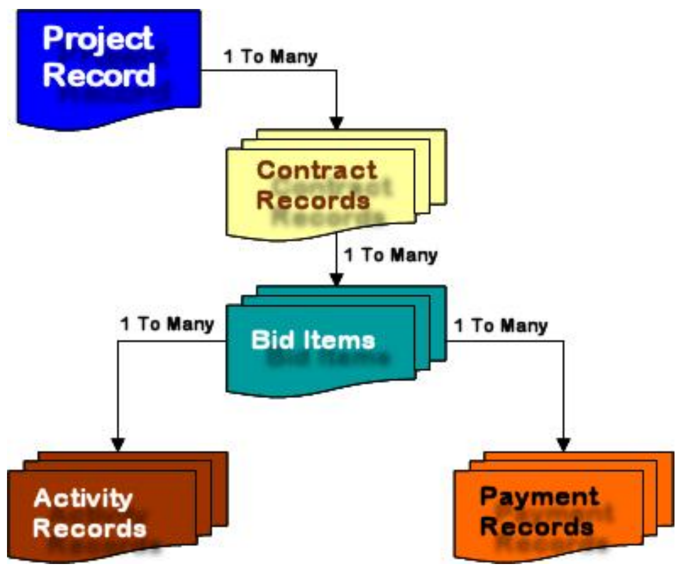
Field office foresters and contracting inspectors
State Office Stewardship Leads
National level BLM foresters
Division of Business Services (DBS) Auditors

SCID has the flexibility to allow very detailed and site-specific information about stewardship contracts to assist field level personnel in day-to-day contract administration. It also allows State Office Leads to easily track activities occurring on projects in their respective states as well as facilitate reviews or audits of specific projects as needed. NBC auditors can review financial transactions for individual projects as well as determine current balance sheets.

Because of its multi-functionality, all portions of the database, as well as the user guide, may not be applicable to all users.

1.2 SCID Structure

The SCID database has a hierarchical structure. The main component (and primary layer) is the project layer. Below projects is the contract layer, where individual contracts are identified. A project can have one to many contracts under it. The next layer down is the Bid Items. The major basis of most data in SCID is the Bid Item. Each project is broken down by service and product bid items that constitute the actual stewardship contract. All Activity Records and Financial Records are built off a specific Bid Item. Without the Bid Item, these records cannot be entered. See image below for a graphic representation of this hierarchy.



1.3 To Access the Database

1.3.1 To access SCID users:

1) Need to be members of the SCID user group. Requests for new users should go through the State Stewardship Lead.

2) Need to have an internet password in their Lotus Notes account. If you have never established an Internet Password through Lotus Notes, your Lotus Notes password may not work. Appendix A provides step by step directions on how to establish a Lotus Notes Internet password.

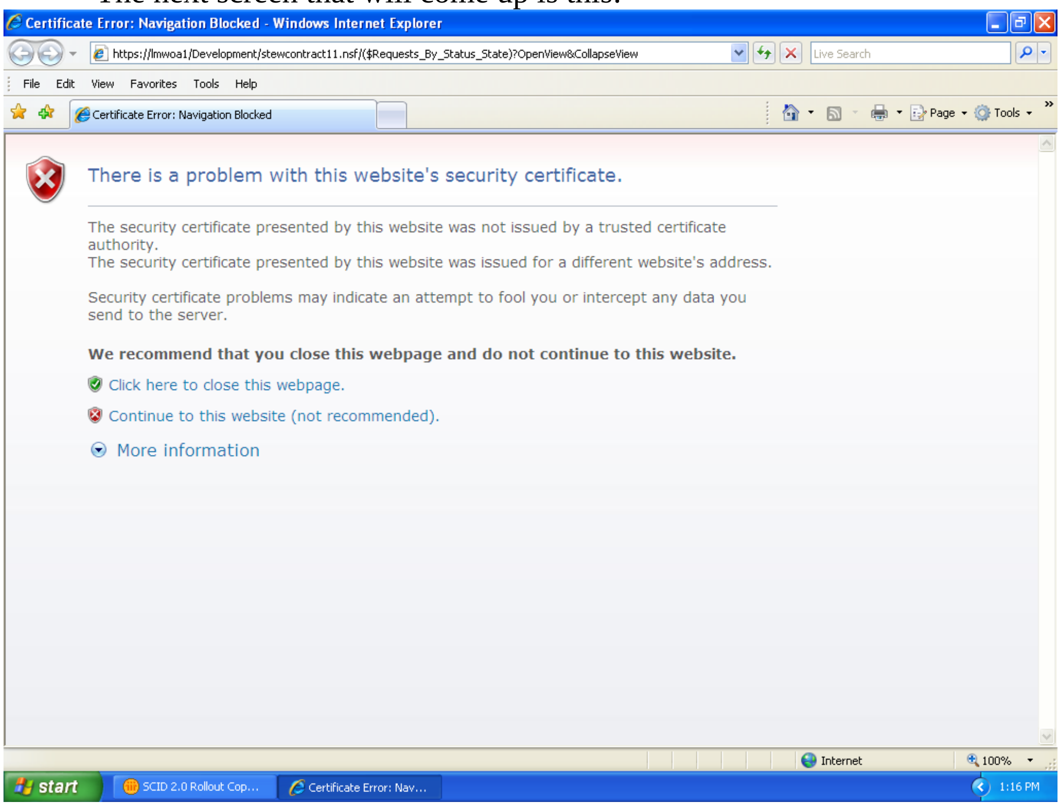
1.3.2 Access SCID

1) Call up Internet Explorer (IE) browser. Netscape Communicator is not supported in this application nor is your Lotus Notes client.

Use the following intranet web address:

https://lmwoa1/stewcontract.nsf/($Requests_By_Status_State)?OpenView&CollapseView

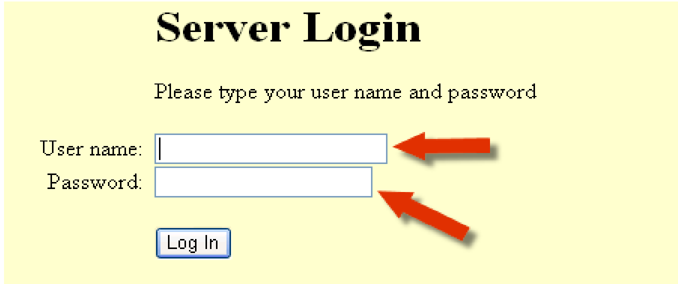
The next screen that will come up is this:



Select "Continue to this website (not recommended)".

2) At User Name prompt, enter your network login name (usually first initial and last name up to 8 total characters). **Please see screen shot below**.

Enter your Lotus Notes password at the Password prompt. If you have changed your Lotus Notes password within the last day, the new password may not work, so use your old one. If you are having difficulty logging onto the web site, please contact Dick Watson at 303-236-0158 (Richard_C_Watson@blm.gov).



From Here the Default opening page if SCID comes up.

2.0 Main Menu

After a successful login, the main menu screen will pop up and look something similar to this:

Stewardship projects can be opened using a variety of views in SCID. The default opening view shown above is the Projects by Status and State view. To open a project, users need to select the appropriate project status, then select the State. The above view is in "collapse" mode. The user can select the " + Expand" button to view a list of all projects. Or the user can select the blue twistie ▸ next to the project status and the project names within that status are shown in the below example for Approved Projects in California:

At the Main Menu screen you have the option of:

1) Selecting a specific project to review or edit by moving the curser to a specific project listed as a hyperlink and clicking on it.

2) Or by going into the blue box (aka Main Menu) on the left side of the screen where the user has several additional choices:

2.1 Main Views

Clicking on “Main Views” allows the user to rearrange the list of projects on the right side of the Main Menu from sorted by Status and State to:

- All projects listed alphabetically
- Fiscal Year
- Status
- Reference BPS number
- State
- Contact
- Status and State – this is the default opening view

The view lists can be expanded or collapsed globally by category (e.g. the specific FY for the FY View) by selecting the appropriate button (Expand or Collapse) or by specific category by selecting the blue twistie next to that category. More information about the project data that can be viewed is in Section 3.0.

2.2 Create Project

This selection allows the State Stewardship Leads to create a new project in the database. If you require this functionality, please contact the SCID Database Administrator. See Section 4.0 (below) for more information on how to create a project.

2.3 Create an Activity/Financial Record

This selection is a short-cut which allows a user to create a new activity record or financial record for an existing project in the database without following normal procedure of opening the specific project, contract and bid item records. The user must have Edit rights to the specific project for which they wish to enter new activity/financial record data. After selecting this button, the user selects whether an activity record or financial record will be entered. Then the user selects the appropriate State/project/contract/bid item from a drop down lists. The user only needs to add the date and accomplishment for that date then save the record. Bid Items must already exist for the selected project and contract in order to create Activity/Financial Records with this short-cut. Activity/Financial Records may also be created (and edited) through the procedures discussed in Section 8.

2.4 Creating a Report

All users have the ability to generate reports from existing data. A brief description of reports available at this time follows:

2.4.1 General Project Information – All Projects

This report provides a list of all projects in the database sorted by FY. Information includes State, Project Name, Acres, Primary and Secondary Goals, Estimated Service Costs, Estimated Product Values, Primary Product, Location, Project Length, and Current Status

2.4.2 Project by FY

Same report as above, however, only projects for a selected FY are shown.

2.4.3 Activity Records by Contract

User selects a specific contract and a report is generated on the extent of activities for that contract. Information includes Contract Number, Contract Total Product Value, Contract Total Service Cost, Total Value, and lists Activity Records by date. Each Activity Record will have Date of Activity, Bid Item Number, Bid Item Description, Type of Bid Item (Service or Product), Unit of Measure, Units Accomplished for this Activity Record, Value Per Unit, and Product of Service Value for Activity Record. The report also provides a Balance to Date of the Product Value minus the Service Cost.

2.4.4 Activity Records by Contract and Bid Item

This report, similar to the Activity Record by Contract report sorts and then lists information first by Bid Item Number and then by Activity Record Date.

2.4.5 Financial Records by Contract

Similar to the Activity Records by Contract report, the Financial Records Report allows the user to select a specific contract, and a report is generated displaying current information related to any financial transactions that have occurred to date for that contract. Information will include Contract Number, Contract Total Product Value, Contract Total Service Cost, Total Value, Payment Bond Amount, Performance Bond Amount, Contractor, and lists financial records by date. Each financial record will have the Date of Invoice, Invoice Number (if there is one), Bid Item Number, Collection Amount, Service Payment Amount, Stewardship Credits Earned, Stewardship Credits Used, Benefiting Subactivity, and Bid Item Program Element.

2.4.6 Balance Sheet by Contract

This report provides the user with the up-to-date financial status of a contract. It consolidates the values of products removed, the service work completed, any collections from the contractor, any payments made to the contractor, and the status of stewardship credits earned and used.

2.4.7 Consolidated Balance Sheet Report

This report, similar to the Balance Sheet by Contract report, consolidates all contracts into one report, in lieu of selecting a specific contract.

2.4.8 Project Summary – Independent Contracts

This report provides a summary of the Bid Items, the product and service work completed to date, and a summary of the financial aspects of the contract.

2.4.9 Product Volumes from SCID

This report displays the conversion of products into reportable units. For each product bid item the bid item entered, the volume conversion factor, and the reportable units.

2.4.10 Service and Product Offered By FY

This report displays the service and product values and product volumes for contracts with a Bid Opening or Offer Date on the General Contract page during the selected Fiscal Year.

2.5 Help

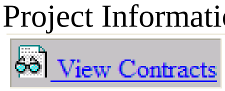
The user will find many helpful explanations on using SCID by selecting this button.

2.6 Logout

Selecting this button logs the user out of SCID and takes them to the BLM Intranet site. This is the preferred method of exiting SCID. However, the user may simply close their browser window to exit SCID.

3.0 Viewing Project/Contract Data

All members of the SCID user group can view information for any project/contract by following the structure of SCID as outlined in Section 1.2. The user must first select a specific project, which takes them to the General Project Information screen. Next the user clicks on the “View Contracts”



button at the top of the page.A list of the contracts associated with the project appears and the user then selects an appropriate contract. Once in the General Contract Information page the bid items can be viewed by selecting the “View Bid Items” button at the top of the screen. The Bid Item list will be in

"Collapse" mode and grouped by Activity Type, so click on "Expand" to see the entire Bid Item list. Select a specific bid item for viewing by clicking on the blue colored number under the "Bid #" column. The Contract Bid Item screen, containing general information about that specific Bid Item, appears. Better descriptions about this general information can be found in Section 7.0. Activity Records and Financial Records for a specific Bid Item can be viewed by selecting the appropriate button in the upper left corner of the Contract Bid Item screen. Selecting the Activity Record button brings up a list of Activity Records entered for that Bid Item. A particular Activity Record can be viewed by selecting the respective blue colored number under the "Activity Record #" column. After selecting an Activity Record number, a Contract Activity Record screen appears with information pertaining to that specific activity record. The "View Financial Record" button, similar to the "View Activity Record" button, allows the user to view Financial Record data.

4.0 Creating a New Project

Only the State Stewardship Leads and the Database Administrators are authorized to create new projects.

When the Create Project button in the Navigator is clicked, if the user has Create Project rights, a blank General Project Information Form appears. Many data fields are required to have data entered. This ensures data integrity and reduces time-consuming follow-up questions and data entry. Required fields have red font and are marked with a small * to the right of the field label. The required fields will change as the project/contract status changes.

To save data after it has been entered, the user must select the "Save & Close" button at the top left of the screen. Selecting the "Project Data" button just below the Status field will also save the data. Note that this button will be yellow in color if the user is in the Project Data section. If the user selects the "Close" button, the user is prompted to "Continue without Saving Edits?" If the user clicks the OK button, the data entered will **not** be saved. However, if the user clicks the Cancel button, the data will be saved before closing the document.

5.0 Editing General Project Information Form

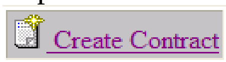
The Database Administrator, the specific State Stewardship Lead and the Assigned Field Office Contact Person have rights to edit existing project data. After selecting a specific project from the Main Menu view, the General Project

Information screen appears. Select the "Edit" 

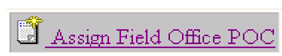
button in the upper left hand corner of the screen to begin editing. If the "Edit" button is not visible, the user does not have Edit rights to that project. Required fields will still require information, so if required data is deleted, a prompt prevents the user from saving any changes to the project until that data field is again populated.

6.0 Creating and Editing Contract Information

New contracts can be created from the General Project Information page. When the Project Page is in the Edit Mode, select the Contract Data 

blue bar to pull up the Contract List page. At the top of this page select CREATE CONTRACT 

. This will bring up a blank General Contract Information page. The Project Information is automatically entered. The General Contract Information page is divided into sections based on the contract status. The first section is Bid Opening or Offered phase, the second section is Contract Award or Approved phase, and the third section is Contract Completion or Termination phase. Note that required fields change when the contract status changes.

The State Lead then clicks on the 

button at the top of the document. Once accomplished, the field person specified as the "Field Office Contact Person" will also have Edit rights to the project and this contract documents.

7.0 Creating and Editing Bid Information

Each contract has Service and Product Bid Items that constitute the actual Stewardship Contract. All Activity Records and Financial Records are created from specific Bid Items. Without the Bid Item, these records cannot be created and populated with data.

Bid Item information can be entered and edited only by the specific Field Office Contact Person, the respective State Stewardship Lead or the Database Administrator.

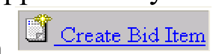
To enter or edit bid information, the user must start at the General Project Information Record, , click on the Edit 

button at the top of the page to get into the edit mode, then select the Contract Data 

button and a list of the contracts associated with the project comes up. Select the appropriate contract and the General Contract Information page for the contract appears. Once in the General Contract Information page select the Bid Info 

button located just below the Contract Status field. A Bid Item

List appears and the name of the project is located just above the Status field. At the Bid Item List, a list of the Project's Bid Items is displayed. If no Bid Items have been entered, a message will inform the user. The Bid Item List, similar in format to the Projects List view, is collapsible and expandable thru use of the appropriate buttons and/or blue twistie ▸.

Note: You may not create a Bid Item until you are in the Bid Items section as the "Create Bid Item" button will not appear until you are. To create a Bid Item, select the "Create Bid Item" button 

at the top of the screen. A blank Contract Bid Item data entry screen appears. Data fields without a blank box will not have information entered by the user (they are usually data fields carried over from another form or consist of a computation made by the system). The following data fields are required (required fields are marked with a small * to the right of the field label) and must have information entered:

<u>Required Data Fields</u>
Activity Type (Product or Service)
Bid Item Number

Bid Description
Number of Units
Unit of Measure
Value per Unit

<u>Additional Required fields for Product Bid Items</u>
Volume Estimate Basis [Lump Sum or Scale]
Product
Volume Conversion Factor

<u>Additional Data Fields</u>
County
Subactivity
Program Element

Note that after a Contract Bid Item has been saved the number of units in the bid description cannot be edited. Contact the Database Administrator if this field needs to be changed.

Some business rules to follow in creating Bid Items:

- Be sure to separate out Service Bid Items from Product Bid Items.

- Please be descriptive in the Bid Item Title:

    Bad - 500 MBF Ponderosa Pine

Good - Commercial Thin PP Unit 1 (you will be able to designate Units of Measure (the 500 MBF) in the database, so there is no need to include it in the title.). You should consider designating an area label (such as Unit 1 Unit 2, Unit 3, etc.) for each respective geographic unit in the Bid Items.

- Consider stages of work as separate Bid Items, or subbid items, for example

Bid Item No.	Bid Item Description
0001A	Road Maintenance - Culvert Installation
0001B	Road Maintenance - Waterbar construction
0001C	Road Maintenance - Final Grading

or

0002A	Temporary Road construction
0002B	Temporary Road Closure and Reclamation.

This will make assigning Stewardship Credits much easier. If it is all consolidated in one item, (e.g. 0002 - Temporary Road Construction and Reclamation) you won't be able to assign Stewardship Credits until the reclamation is done. The contractor would probably like to use the earned construction credits after the road is built and they are ready to harvest timber.

- For Product Bid Items, SCID is primarily designed to address monetary (i.e. dollar) values which are needed for contract administration. For each Product Bid Item, you can set the “Number of Units” at something easy to determine in the field (e.g. acres). As the contract progresses, the contract administrator only needs to record the number of acres done for a specific Activity Record. The user will be required to enter a conversion factor for each Product Bid Item. This conversion factor is the relationship between Product Volume and the Bid Item “Number of Units.” As “Units of Accomplishment” (see Activity Record information) are entered, the database will also track units of Product Volume separately. This information will be used for end of year reporting in “Public Land Statistics” and in performance measure reporting.

  For example, the user has one Product Bid Item for commercially thinning 100 acres of sawtimber. The user has cruised the timber and has estimated that there will be about 10 MBF of sawtimber removed per acre. An appraisal of the timber has determined the value at $100/MBF, which also corresponds to what the successful bidder placed on this Bid Item. The user selects ***Acres*** for “Unit of Measure,” selects 100 for “Number of Units,” and selects ***$1000.00*** for “Value Per Unit” (10 MBF/acre X $100/MBF). The user also selects ***Sawtimber*** for “Product,” ***MBF*** for “Product Unit,” and *10* for “Volume Conversion Factor.”

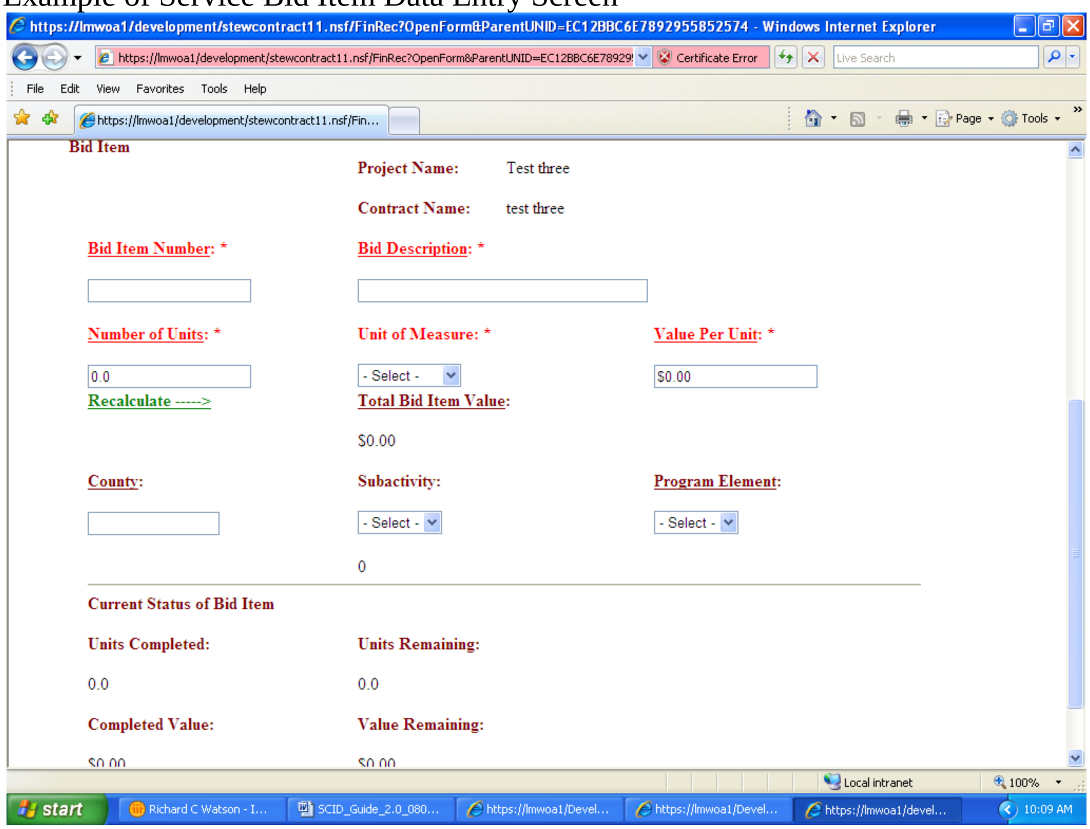
As work progresses on this Bid Item, all the user has to enter in the Activity Record is the number of acres completed. The program automatically determines the value of the Bid Item accomplished to date, and the volume of timber that has been removed to date.

- More information about Activity Records can be found in Section V.

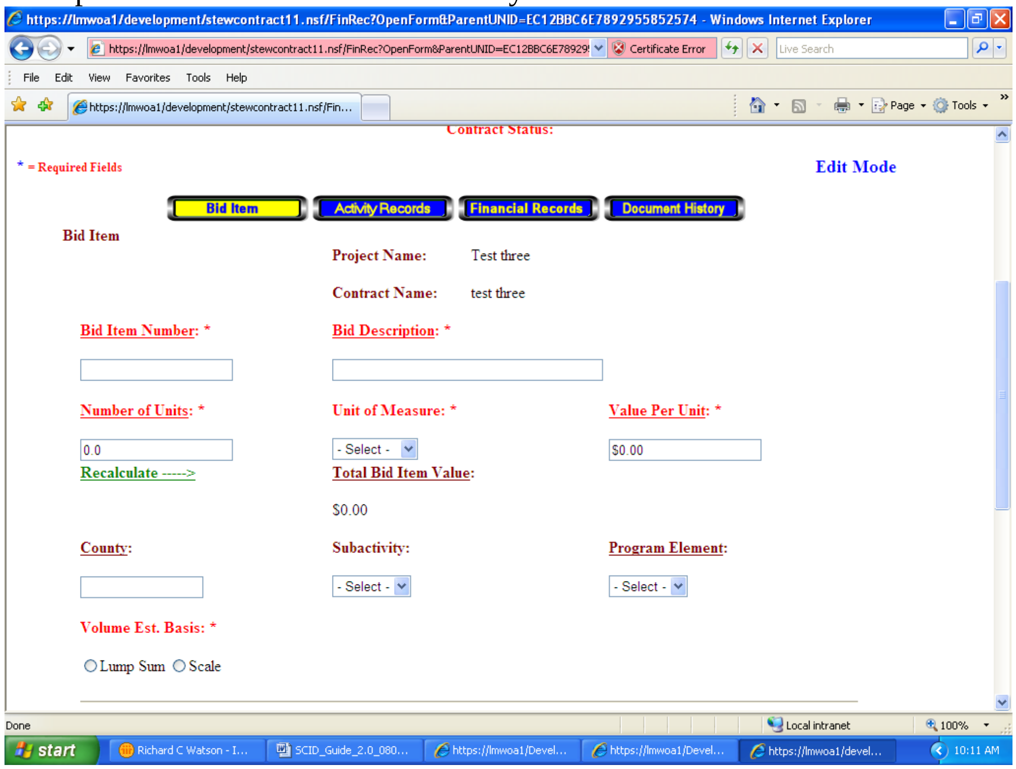
- Separate out Bid Items by benefiting Subactivity and Program Element. While these data fields are not required, data entry here will prevent future data calls from the WO.

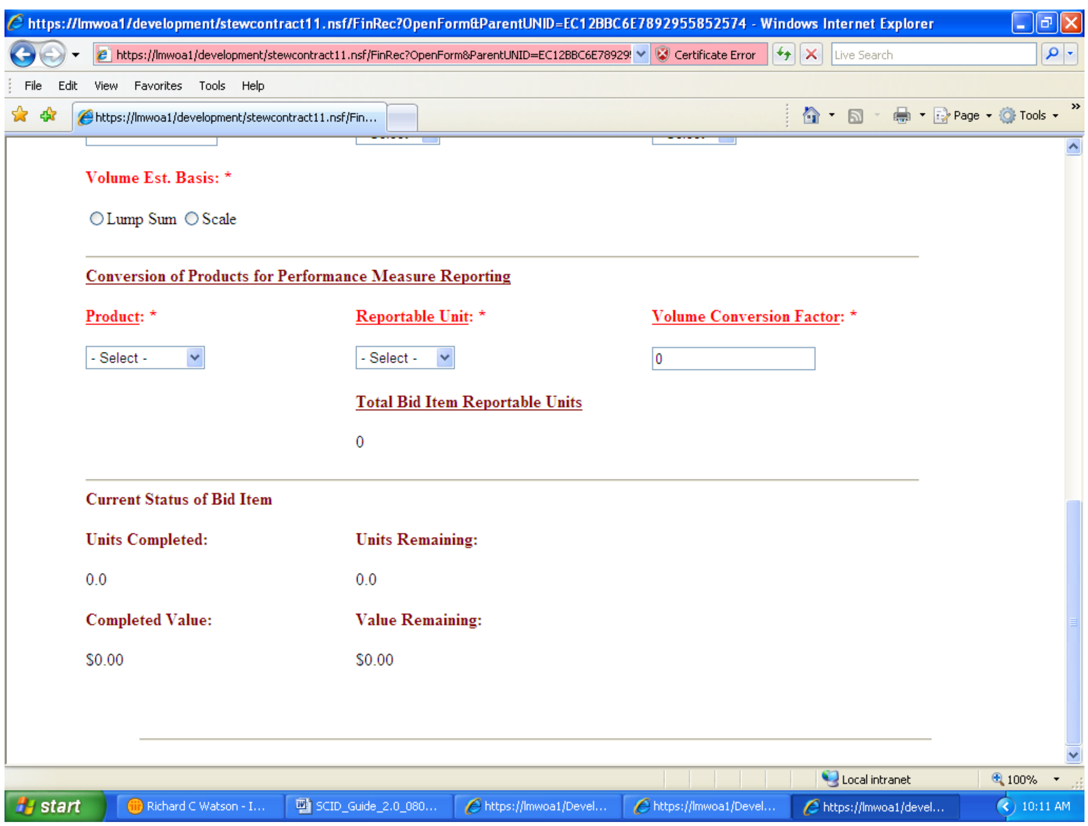
- Make your Units of Measurement in whole numbers. For example, either round up or down 30.5 acres to 31 or 30 acres. (*Why? - - If your Value per Unit is down to cents (e.g. $10.83 per acre) and you go down to tenths in your Unit of Measure (30.5 acres), the total value is $330.315. That $0.005 will give you nothing but trouble in rounding errors and trying to get the values to reconcile at the end of a project*.)

Example of Service Bid Item Data Entry Screen



Example of Product Bid Item Data Entry Screen





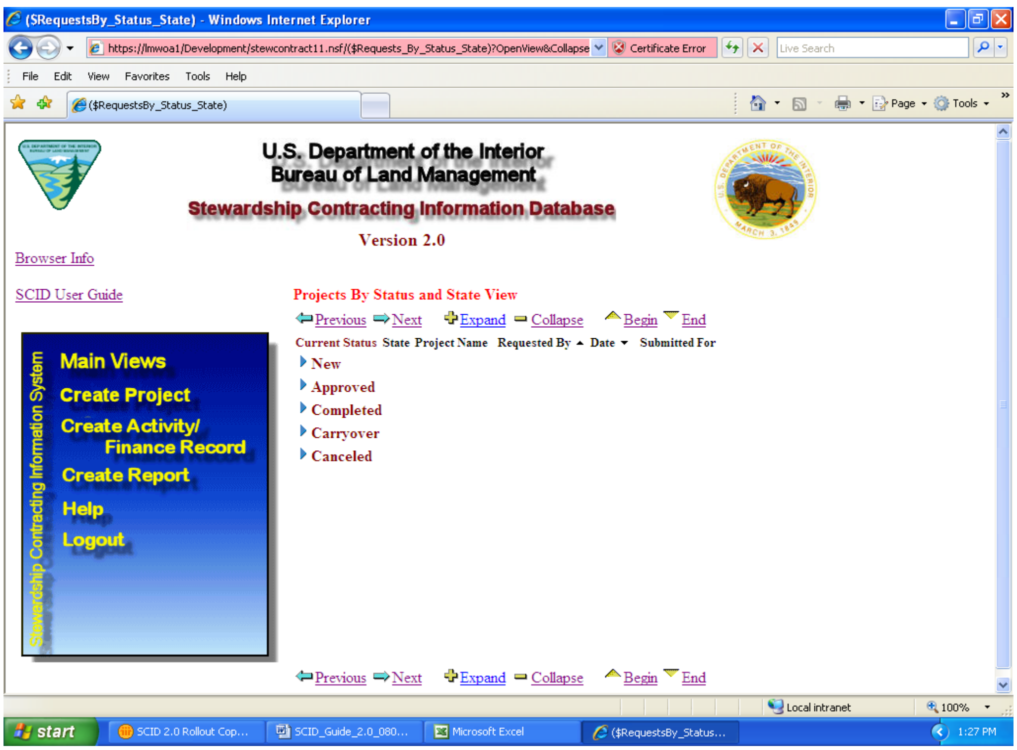
8.0 Creating and Editing Activity Record/Financial Record Information

Activity or Financial Record information can only be created and edited by the specific Field Officer Contact Person, the respective State Coordinator(s) and the Database Administrator. All others are only allowed Read Access to existing Activity Records.

There are two ways to enter new Activity of Financial records.

1) From the Create Activity/Financial Record link 

in the blue box (Main Menu) on the opening screen. This is the preferred method for entering Activity/Financial Records.



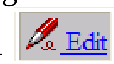
Next the user will be asked to select whether an Activity or Financial record will be entered. Click on the appropriate radio button.

Please select whether you wish to create an Activity Record or a Financial Record:

○ Activity Record ○ Financial Record

Following this the user needs to select the appropriate State/Project/ Contract/Bid Item for the Activity or Financial Record.

2) The second method for entering an Activity or Financial Record is for the user to select the Project/Contract, then select the Bid Item, and then enter the Activity or Financial Record for a particular bid item To enter or edit Activity/Financial Record information, the user must start at the General Project Information Record, select Edit, then select the Contract Data 

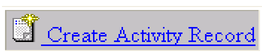
button and a list of the contracts associated with the project comes up. Select the appropriate contract and the General Contract Information page for the contract appears. If the contract is not in Edit Mode click, on the Edit 

button at the top of the page. Then select the Bid Info 

button located just below the Status field. A Bid Item List page appears and the name of the project is located just above the Status field.

To create an Activity Record, the user selects the Bid Item that corresponds to the activity that needs to be recorded. A completed Project Bid Item screen appears. The user selects the "Edit" button 

at the top left part of the screen. The Project Bid Item data is now in Edit mode, with editable data fields highlighted with boxes. The user then selects the "Activity Reports" button 

just above the editable fields. A list of Activity Records by date appears. If there are no Activity Records in the database for that Bid Item, a message appears to that effect. To create a new Activity Record, select the "Create Activity Record" button 

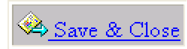
at the top of the screen. This button only appears after the Activity Reports button is selected and then only if the Contract Status is either "Awarded or Approved" or "Completed or Terminated." A new screen appears entitled "Contract Activity Record" with additional information brought forward from the Bid Item record used to create this Activity Record such as Activity Type (Product or Service), Project Name, Bid Item Number, Bid Item Description, Program Element, Unit of Measure, and Value per Unit. For service Bid Items enter the "Date Service Work Completed" and "Service Units Accepted" fields. For Product Bid Items enter the "Date Products Removed" and "Product Units Removed" fields.

If the user only needs to edit existing Activity Records, the process is very similar, the only exception being that the user should locate the existing record on the Activity Record List under that Bid Item. The user selects the record number, displayed as a blue hyperlink, under the Activity Record # column. That specific record is then displayed in a separate browser window, allowing the user to make necessary changes to it once that document has been placed in Edit mode

The process for entering and editing Financial Records is virtually the same as for Activity Records. When entering Financial Records select FINANCIAL RECORDS 

instead of Activity Records.

After data has been entered for the <u>first time</u>, the user should select the “Save” 

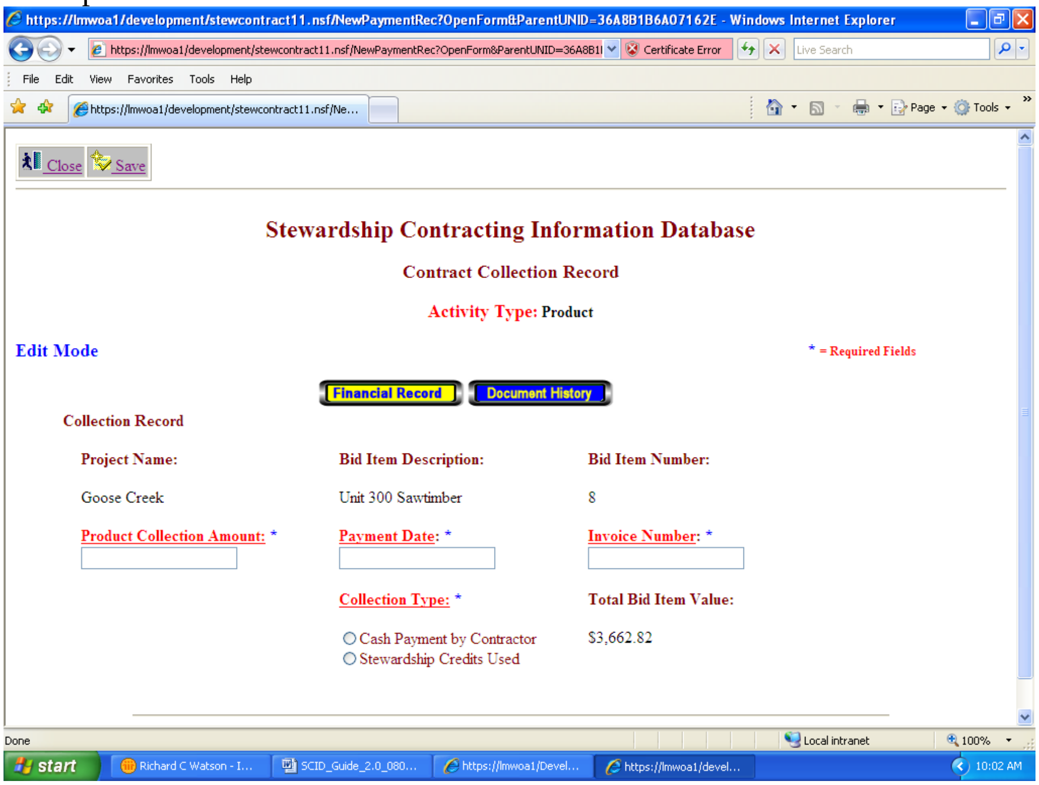
and then the “Save & Close” 

buttons at the top left of the screen. Similar “Save & Close” selections need to be made at the Project Bid Item List form, and the General Project Information Form. If the user selects “Close” instead of “Save & Close,” the user is prompted if they wish to “Continue without Saving Edits?” If the user clicks the OK button, the data entered will <u>**not**</u> be saved. However, if the user clicks the Cancel button, the data <u>will</u> be saved before closing the document.

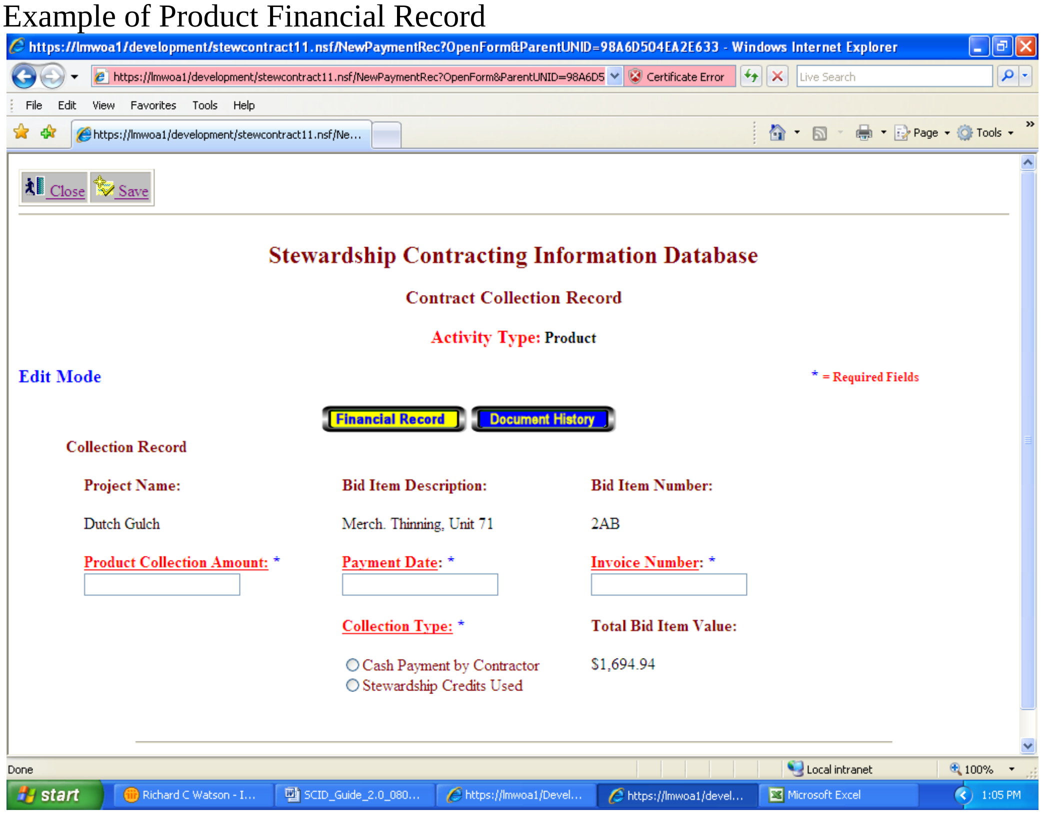
Example of Service Activity Record

Example of Product Activity Record

Example of Service Financial Record

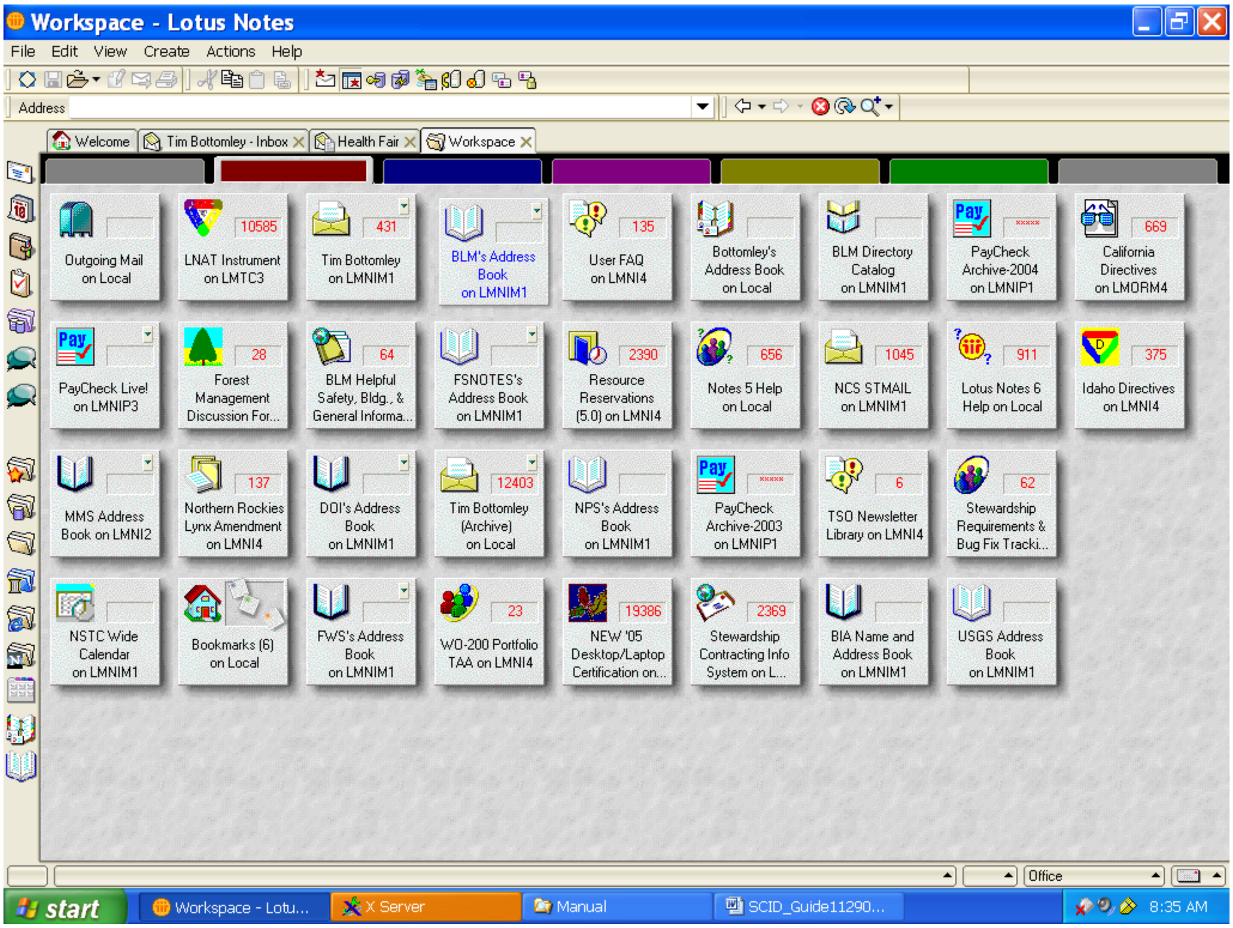


Example of Product Financial Record



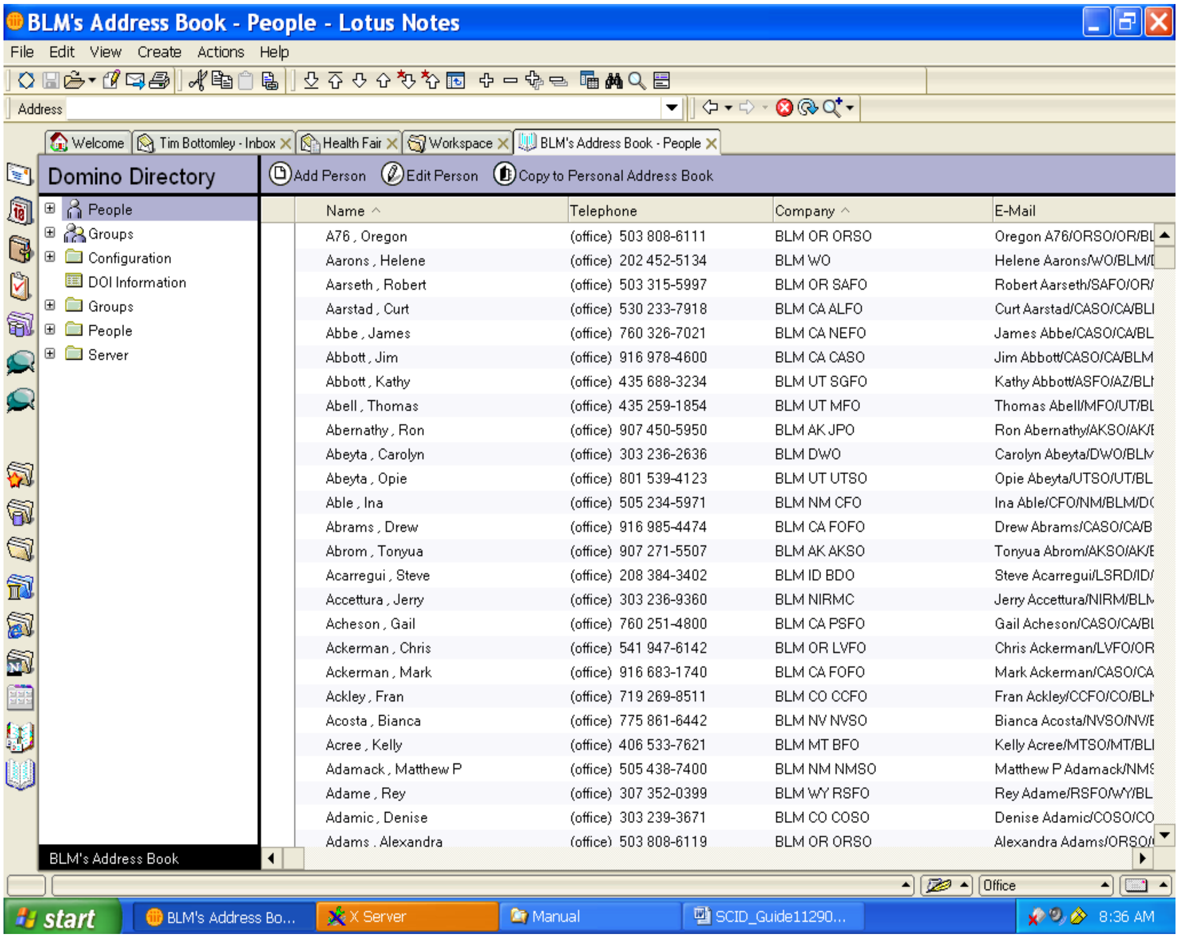
Appendix A
Establishing an Internet Password in Lotus Notes

1. Find the BLM Address Book from the Workspace directory in Lotus Notes.

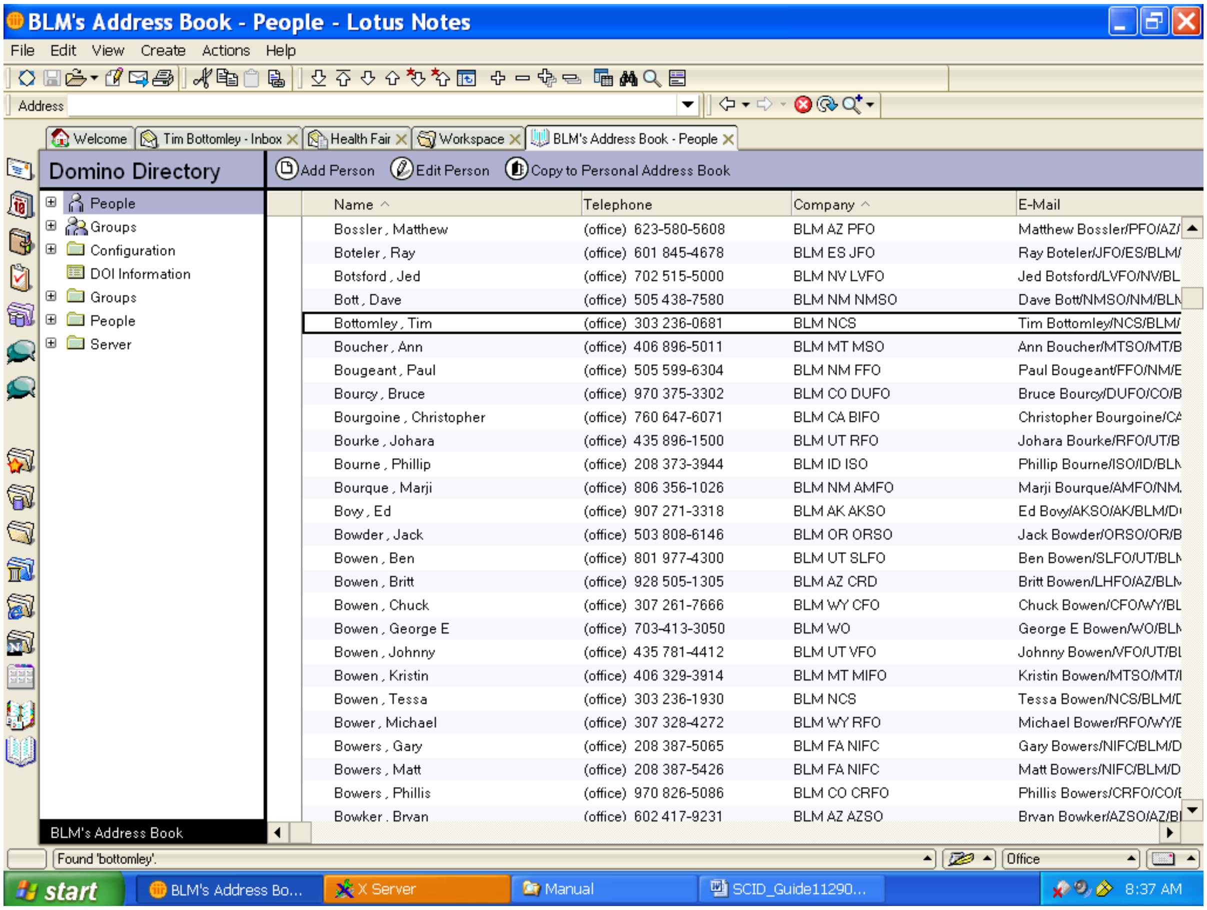


If you do not have the BLM Address Book database in your Lotus Notes Workspace, contact your local computer person to have it installed in your Workspace.

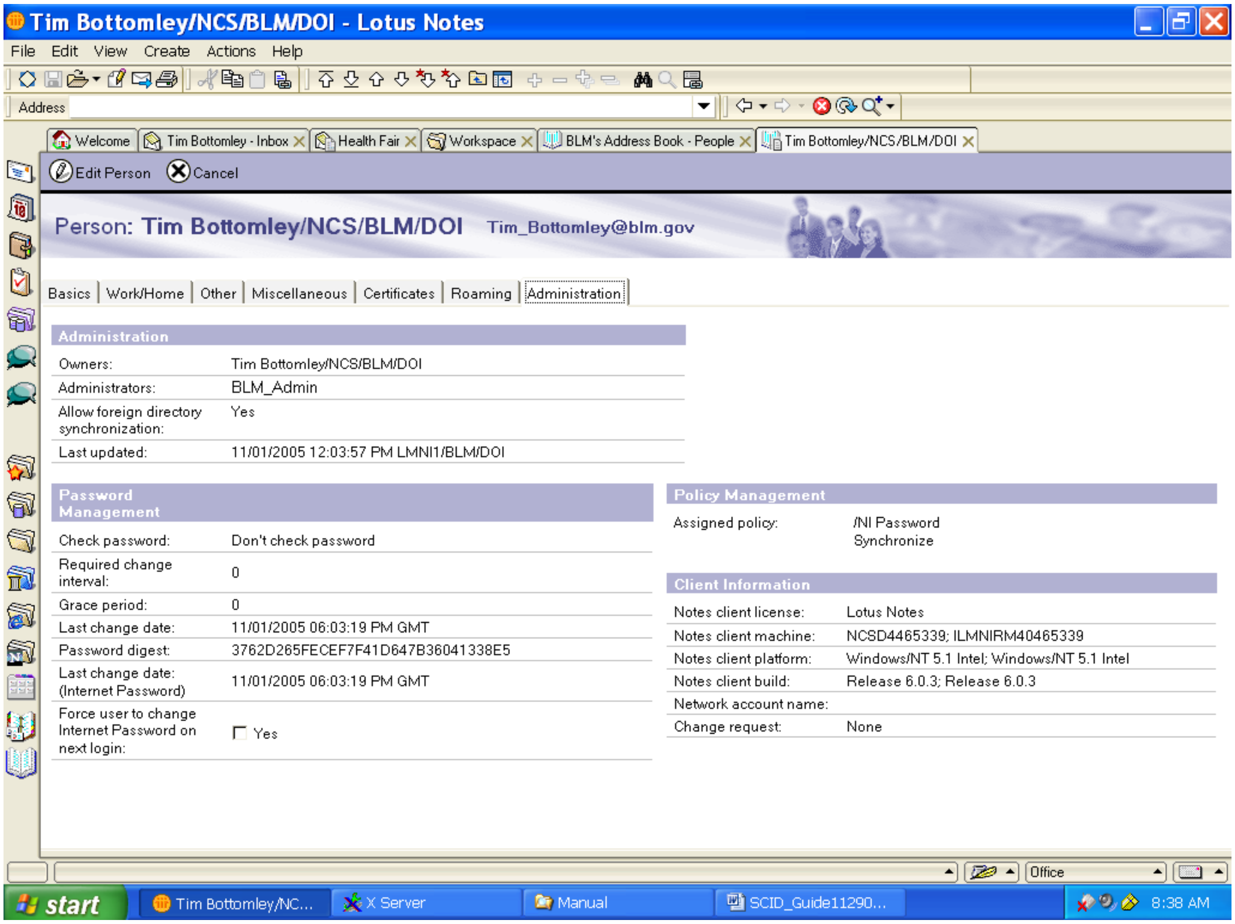
2. Double click on "BLM's Address Book …", and the following should come up.



3. Find your name.

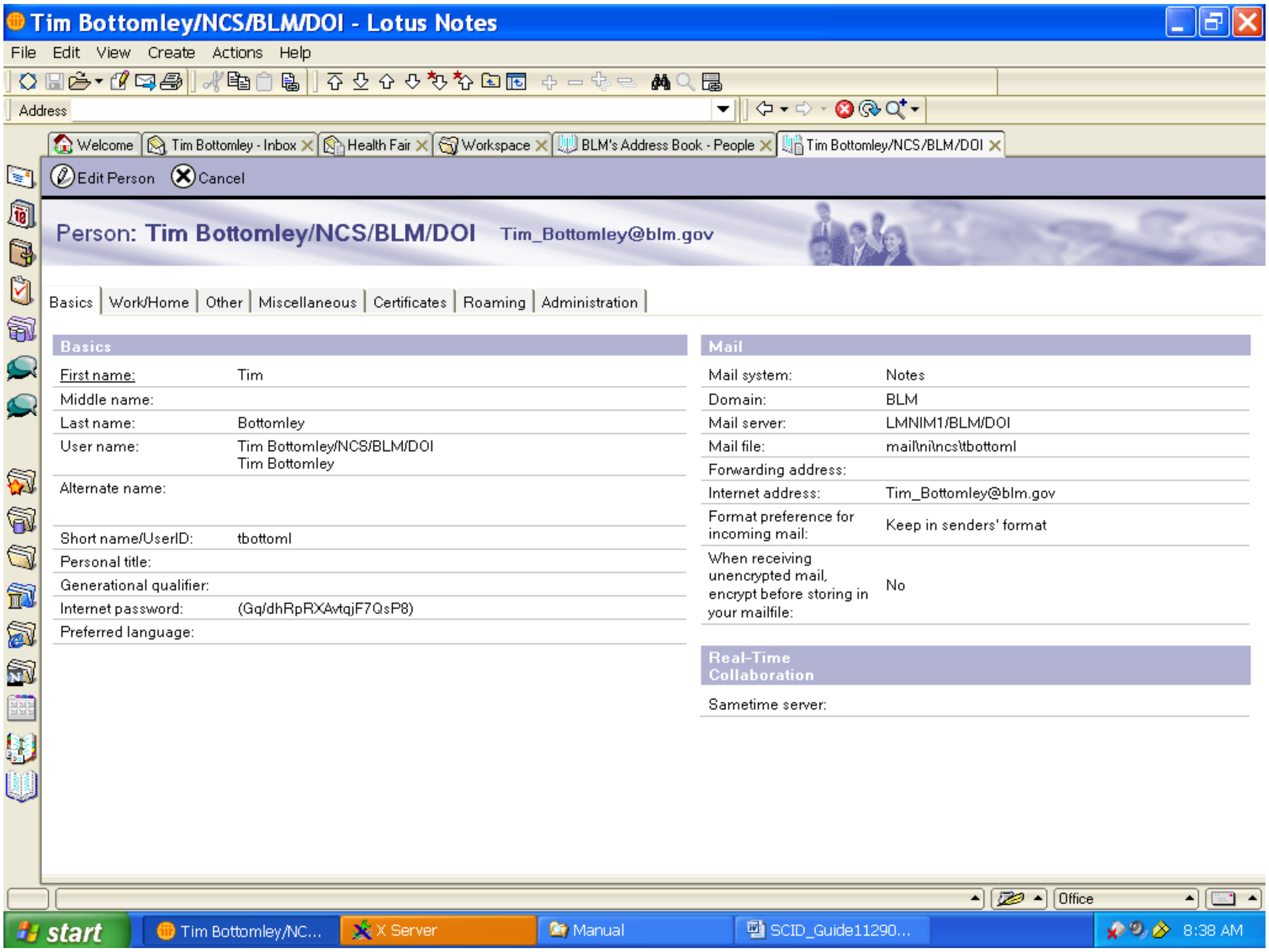


4. After double-clicking on that name, the following should come up.



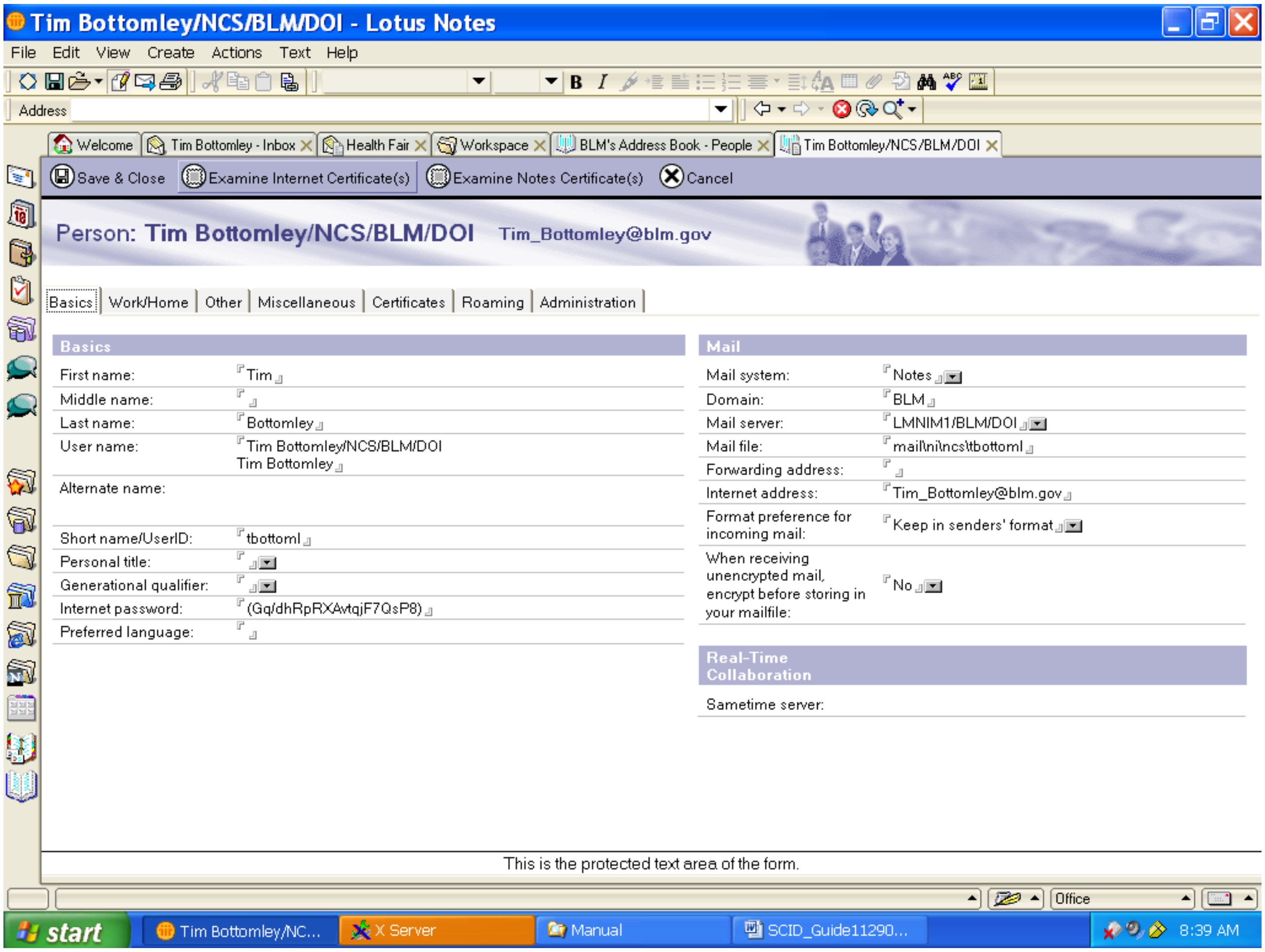
Just below the name in the above screen shot, there are several tabs: Basics, Work/Home, Other, Misc., Certificates, Roaming, and Administration. In the above example, "Administration" is the one shown.

5. Click on the “Basics” tab.



The Internet password is on the second from bottom line on the left. The numbers and characters shown in the above example are not the actual password.

6. Select Edit Person (just above your name on the upper left side of the screen).



Now change the Internet password to one of your choosing. Use the strong password structure (8 digits, capital and small letters, at least one number, and one symbol). **Important – be sure to remove the parentheses around the password when you create your password**, or the 'world' will be able to see it.

Once you establish an Internet password, it will automatically change to your Lotus Notes password after the next password change in Lotus Notes. However, this refresh usually occurs after business hours, so your new Lotus Notes password will not work until the next business day.