eLINK Guidance Document

Overview

> **Purpose:** This document highlights some of the features and definitions within the eLINK system.

Terminology

Activity: An activity is a project or group of projects that is categorized by an **Activity Category**. Under each Activity, there may be multiple **Activity Budgets** and **Activity Details**.

Activity Budget: Each Activity contains at least one Activity Budget, or funding source. The Activity Budgets may represent funds provided by the Current State Grant, Federal, Landowner, or Other State Funds that are used to complete an Activity.

Activity Category: Activity categories are used to filter **Activity Details** in the system and to create reports where the listing of individual activities is not necessary or outside the system. Note: not all categories are eligible activities for all grants.

Activity Details: Activity details is equivalent to best management practices (BMPs) in the old eLINK except the current activity details includes additional non-constructed BMPs such as inventories, management plans, etc. Activity details captures information such as indicators and installed dates.

Grant: A grant is a single fiscal year of a fund (i.e. *FY17 Stormy County NRBG – Local Water Management*) or a funded grant application (i.e. *FY17 Stormy County Projects & Practices – Stabilization of Thunder Creek*. Many grants may be included within a single grant agreement. New Grant records are created and available to an LGU user after either a competitive application is awarded or the unexecuted grant agreement for a noncompetitive grant is made available to the LGU. Active grants are available on the user's **Home** page. Closed grants can be found through a search on the **Home** page when the "Include Closed Grants" button is checked.

Roles/User: A user is an individual who has access to view and/or modify information within eLINK. A user has access only to information related to the user and the user's organization(s). A user may have access to **Grants** outside the user's organization if assigned as a **Team Member** for the grant by a user within the grant recipient organization.

Team Member: A user may select team member(s) from other organization(s) as partners on a **Grant.** Users can set the permissions of team members to either read-only or edit. Team members must been registered users within eLINK. Note: members of the submitter's organization of a competitive grant are default team members with read-only permissions.

Navigation within eLINK

Once a user logs into eLINK, she or he will come to the home screen. At the top of the Home screen, below the "eLINK, the BWSR Grants Management System" header, is a series of icons. These icons are: Home, Apply, Track, Search, and Contacts and Organizations. Users can navigate to specific modules within eLINK by clicking on an icon and selecting the appropriate item from the drop down menu. Users can return to the eLINK home screen from anywhere within the system by clicking on the "eLINK, the BWSR Grants Management System" header.

Home

Home: Source of in-system messages, quick reports, and a list of grants associated with the user.

- ■ **Messages:** System-generated messages about grants in the system.

- ■ **Quick Reports**: Access to frequently used, grant-specific reports.

- ■ **Grants Search and Grants Status Summary:** Allows users to filter and search within the grants they have access to. By clicking on the "Include Closed Grants" button, the search is expanded to include view-only access to closed grants within the user's organization. Clicking the "Grants Status Summary" button will generate a status report for all grants appearing in the **Grants Grid** (maximum of 1000 results).

- ■ **Grants Grid:** Includes all active grants of the user's primary organization, and any grant where the user created an application or is assigned as a Team Member. Note: The column Grant Budget Amount in the grid on the lower section of the home page is the total budgeted for awarded grants - it does not total budgets from grant applications.

  A **Grant** is accessed through the Edit action icon 🖉 on the **Home** page within the **Grants** window on the lower portion of the screen. Once Edit is selected, a new screen will open with the following options (tabs) available.

  - ■ **Grant** – For grants with applications, equivalent to the current narrative of competitive applications. Questions vary by fund source. The Day-to-Day Contact for the grant can be edited within this tab.

  - ■ **Grant Map** – For grants with applications, functions as a means to provide a map with competitive applications as well as to select HUC12s. Mapping of installed BMPs occurs in separate location.

  - ■ **Application Budget** – For grants with applications, equivalent to the current spreadsheet of the competitive applications.

  - ■ **Team Selection** – Allows a grant applicant or primary contact for non-competitive grants to set edit and view permissions on the **Grant**, including those outside the organization who are registered eLINK users. Everyone in the primary organization of the person who originally creates an application is assigned a view-only role as a default. BWSR staff do not need to be assigned as team members.

  - ■ **Progress Report** – New feature for all grants. Allows for users to summarize in narrative form what has been completed since the last report, but does not replace reporting on Actual Results or quantifiable reporting details.

  - ■ **Attachments** – Consolidates attachments associated with a single **Grant**.

Apply

Apply: This is where users go to *start* an application. Applications in progress can be saved, edited, withdrawn, and submitted by users up to the given deadline for the specific grant application; after which the application is locked. Note: a saved application can be accessed for editing through the **Home** screen.

Track

Workplan Activities: The Workplan Activities page summarizes budgets and expenditures for all activities associated with the user, and can be filtered by specific activities or grants. Workplan Activities filtered to a specific grant are accessed by clicking the 📊 icon for a specific grant on the home page. The action icons allow the user to change budgets, report expenditures, add details such as BMPs, report indicators and map BMPs.   Additional information about the specific action icons associated with activities on this page can be found in the *eLINK Guidance Document* "Managing Activities."

Document Library: Consolidates system-generated or user-added attachments of all grants for an organization. Documents for an individual **Grant** can be found within the **Attachment** tab of that grant by clicking on the View or Download ⬇ action icon.

Search

Search>Ad Hoc Search: Place to perform tabular queries of eLINK data. The screen will show basic results of the search criteria entered and reports of the full data set can be generated.

Search>GIS Viewer: Place to perform spatial queries of eLINK data. GIS viewer can be used to print a basic map or to download the spatial data.

Contacts and Organizations

Contacts: A **Contact** within eLINK is identified as a user, the staff and boards/councils of the organizations of these users, state and federal agency staff, and potentially staff of organizations partnering with these contacts. Cooperators - the landowners or land occupiers that receive funding for implementation of practices - will have their information recorded and stored directly with **Activity** information.

- **Primary Organization** and **Contact Type** are assigned by BWSR staff.

- The system doesn't restrict entering a contact twice. However, duplicate entries for contacts are not recommended.

Organizations: eLINK will collect basic directory-type organization information such as location information, websites, and meeting dates. Users can access information for only the organizations to which they are associated. The public page can be used to access information for organizations within eLINK.

TAA Database: The TAA Database is available to Soil and Water Conservation Districts only. This database allows BWSR to benchmark and monitor levels of Technical Approval Authority at SWCDs.

Biennial Budget Request: The Biennial Budget Request module is available to organizations who are eligible applicants for BWSR's Clean Water Fund competitive grants. See the *eLINK Guidance Document* "Biennial Budget Request" for more details.