THE BWSR

eLINK

COOKBOOK

BOARD OF WATER AND SOIL RESOURCES

Table of Contents

Updated December 2018: Minor edits were made due to enhancements to the eLINK system. Those enhancements will make some of the system windows look slightly different than the screenshots in this document, but do not affect the steps outlined.

Updated May 2019: Hyperlinks were updated to work with the new BWSR website.

Updated February 2021: Clarification added in the guidance for entering actual results under the Edit Activity section.

Updated December 2022: Hyperlinks were updated to reflect changes to referenced guidance.

Managing Activities

The first step in completing the grant reporting requirements in eLINK is to update all of the activity and expenditure information for the grant. This is done through the Workplan Activities module in eLINK, which will be outlined in this section of the eLINK Cookbook. Before getting started, download the eLINK Guidance: *eLINK Reporting at a Glance* for specific requirements for each grant.

For more information on Managing Activities see the eLINK Guidance: *Managing Activities*.

Terminology

Activity: An Activity in eLINK 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 appropriate; see the eLINK Guidance: *Activity Categories*. Note: Not all Activity Categories are eligible for all grants.

Activity Details: Activity Details are equivalent to best management practices (BMPs), but also include additional non-constructed BMPs such as inventories, management plans, etc. that make up the Activity as a whole; see the eLINK Guidance*: Practices.* Activity Details capture information such as indicators, mapping, and installed dates.

Managing Activities: Adding New Activities/Activity Budgets

To add new activities to an existing grant, click on the **Workplan Activities** icon next to the desired grant in the grants table of the Home screen. This will bring users to the Workplan Activities screen, with the activities filtered by the grant selected.

To add new activities or to link new funding sources to existing activities, users should click the **"Add New Activity Budget"** button on the Workplan Activities screen and enter the following information.

Add Activity Budget   ×

1. Grant*   [▼]

2. Activity*   [▼]

3. Not shown. Pops up when "Create New Activity" is selected in step 2.

4. Budgeted Amount $*   [   ]

5. Source Type*   [▼]

6. Source Description   [   ]

7. Match?*   [▼]

                              8.   **9.**
                              [Save]   [Close]

1. **Grant**: Select from the dropdown the grant in which to add the activity.

2. **Activity**: Select the Activity associated with the new funding source to be entered or "Create New Activity". The activity list consists of: activities planned in an application if applicable, new activities created since this grant was awarded (following these steps), and any activities linked to from another grant. When adding a new funding source to an existing activity make sure you select that existing activity instead of creating a new activity.

3. **Activity Name** (only available if the "Create New Activity" option under Activities has been selected): Enter a new activity name.

4. **Budgeted Amount**: Enter the amount budgeted against the source that will be identified below. This is the amount allocated for this activity based on the source type and description.

5. **Source Type**: Select the applicable Source Type.

    a. **Current State Grant**: Select only for budgeting against the grant selected in step 1.

    b. **Federal Funds**: reflects Federal sources of funds. Match = yes or no (depending on individual policies).

    c. **State fund not in eLINK**: reflects funds from other state sources that are not represented in eLINK. Match = no for these funds.

    d. **Local Funds**: reflects all other sources. Match = yes or no (depending on individual policies).

6. **Source Description**: Enter a clear, concise description that differentiates the source type. Provide enough specificity so that you can differentiate between source types.

7. **Match**: Mark 'yes' if the source is to be considered match fund for the grant fund or 'no' if the source is to represent other leveraged funds not to be considered match.

8. **Save**. Upon successful completion of this step, a notification that the item has been successfully completed will appear above the grant line item. If there are errors, the system will highlight the missing information.

9. **Close**. Close upon successfully saving the information.

10. Repeat as many times as necessary to add all state grant, matching and other funds.

Managing Activities: Edit Activity

After the activity budget has been successfully saved it will show up in the **Workplan Activities** grid. Each individual funding source for a given activity will be listed as a separate row in the grid.

To enter new information or make edits to the activity use the **Activity Actions** icons. Activity Actions include detailed information about the tasks within the activity. Selecting the Activity Actions for any row of a specific activity will change this information for all rows (funding sources) of this activity.

Click the **Edit Activity** icon to edit information about the activity; this will open a popup window.

Scroll down for Actual Results and Save/Close buttons.

1. **Activity Name**: was entered earlier when the activity was created. Editing the Activity Name here will edit it for all budget rows of the activity.

2. **Activity Description**: enter information about what the activity **will** accomplish.

3. **Activity Category**: see the eLINK Guidance: *Activity Categories* for more information about these categories.

4. **Local Activity Number**: enter your local contract or activity tracking number if applicable.

5. **Activity Lifespan (yrs)**: enter an estimated lifespan if applicable to the activity. Not all activities have lifespans.

6. **Start Date**: enter a date when you anticipate the activity will start. This can be edited to the actual start date in the future as applicable.

7. **Completion Date**: enter a date only when the project is completed.

8. **Actual results**: enter information about what the activity **did** accomplish. This should be entered after work has begun and updated through activity installation or implementation.

9. Upon completion of information in this window click Save, then click Close.

Managing Activities: Edit Activity Details

Click the **Edit Activity Details** icon to enter details about the activity such as the specific practices to be installed. This will open a new window. Activity details are a subset of individual elements or practices that make up an activity as a whole.

This step is not required for all activities. Activity Details are only needed when there are individual best management practices or other elements under the activity. For example, activity categories Administration and Project Development don't have Activity Details. See the eLINK Guidance: *Chart of Practices by Activity Category* to help determine if Activity Details are applicable for a given activity category. If Activity Details are not applicable skip ahead to the *Activities: Activity Rates and Hours* section on page 12.
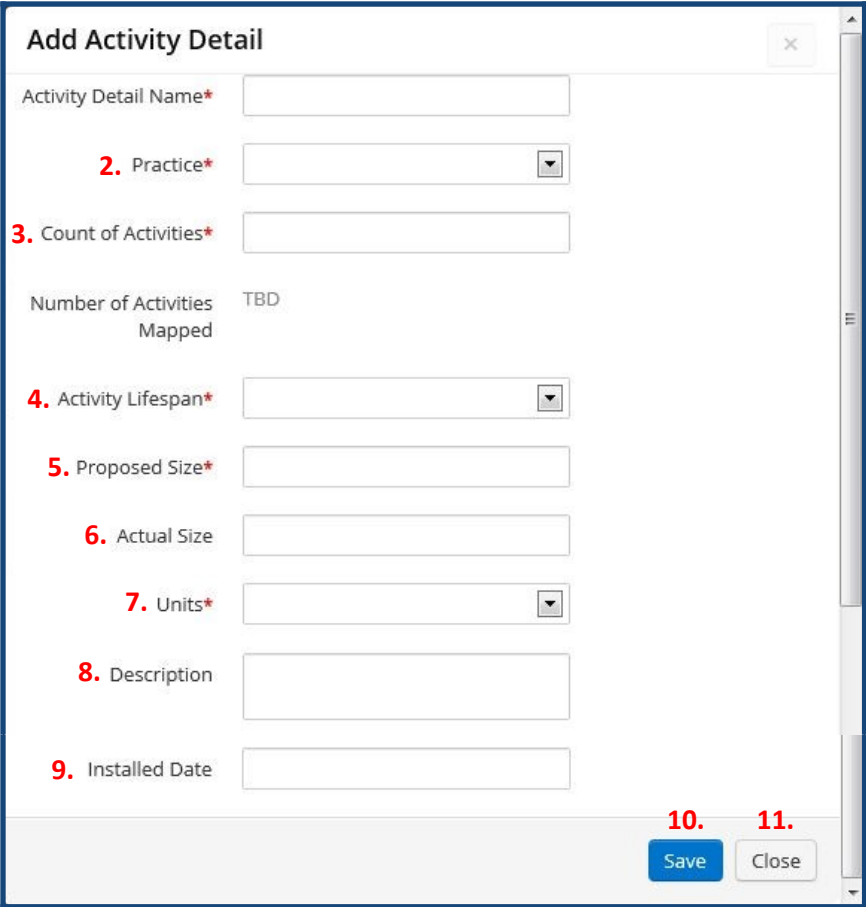
Click the **"Add New Activity Details"** button and enter required information.

1. **Activity Detail Name**: enter a name that will distinguish the activity.

2. **Practice**: select the appropriate practice from the dropdown; this list is filtered based on the Activity Category selected in the edit activity module. If the Practice you wish to select is not available, you may need to edit the Activity Category within the Edit Activity window.

3. **Count of Activities**: enter the proposed number of the activities to be accomplished.

4. **Activity Lifespan**: enter the appropriate lifespan.

5. **Proposed Size**: enter the estimated size (do not include units of measure in this line).

6. **Actual Size**: to be entered after project is completed.

7. **Units**: units of the size.

8. **Description**: enter any other information that describes the project.

9. **Installed Date**: to be entered after project completed.

10. **Save**. Upon successful saving, an indication that the activity has been successfully saved will appear in the top of the window. If any of the line items are not correctly completed, the system will notify the user of the specific line item in which the error occurs.

11. **Close**.

12. Repeat as necessary to add additional activity details associated with the project by starting back at the "Add New Activity Details" button.

Managing Activities: Edit Activity Details - Indicators

To edit or add to the activity details after saving, from the activity details window, click the **Edit** icon.

Click the **Indicators** icon in the activity details window to add final indicators for the activities reported based on the actual estimated results.

Scroll over to

Save and Close

1. **Indicator Category**: select the primary category for the indicator; this will filter the next list.

2. **Indicator Name & Units**: select the specific indicator name.

3. **Value**: enter the value consistent with the units in the previous selection.

4. **Waterbody**: enter the waterbody the indicator is intending to address.

5. **Calc. Tool**: select the calculation tool used to determine the value.

6. **Comments**: enter additional information about the calculation, or if the calculation tool was not available, enter the name of the tool used.

7. Click on the green check at the right of the window box to save the indicator.

8. Repeat for additional indicators.

9. Hit the [X] in the upper right hand corner of the window to close the window and return to the activity details window.

Managing Activities: Edit Activity Details - Mapping

Click the **Activity Detail Map** icon to map the reported projects. Note the number of mapped projects will appear in the activity details.

Under the **BMP Editor** select the applicable feature type then add to the map. When project is mapped click on the **Go Back** button in the bottom left corner of the screen.

Click **Workplan Activities** at the top of the screen to return to the Workplan Activities Screen.

Managing Activities: Activity Rates and Hours

Click the **Edit Activity Rates & Hours** icon to enter information about the rates and estimated hours. This is a legislative requirement of the Clean Water Fund. Consult your BC if you have questions on the information that should be entered in this window.

This step is only required for Clean Water Fund grants and is generally completed during the work plan stage.

Managing Activities: Expenditures

Clicking the **Expenditures** icon opens a window where individual expenses of the specific fund source and activity combination are recorded.

1. **Expenditure Date**: select the date of the expenditure.

2. **Expenditure Amount**: enter the amount of the expenditure.

3. **Description**: enter a description of the expenditure.

4. Click on the green check at the right of the window box to save the indicator.

5. Repeat for additional expenses.

6. Hit the [X} in the upper right hand corner of the window to close the window and return to the workplan activities window.

Managing Activities: Editing and Deleting Activity Budgets

Click the **Edit Activity Budget** icon to change a budgeted amount, which was inputted during the Add New Activity Budget process. Budgets of locked activities can be viewed-only by clicking the **View Activity Budget** icon which would show instead of the edit icon. Activities budgets are locked by BWSR when a workplan is required for a grant and the workplan has been approved. Changing these budgeted amounts requires a work plan modification or amendment. Please work with your BC for assistance.

The **Delete Activity Budget Row** icon can be used to remove an Activity Budget. This deletes the budget row for an individual funding source, but does not delete the activity. Be aware that once Activity Budget information is deleted it cannot be restored. This function is not available when the workplan is locked.

Managing Activities: Linking Existing Activities to a Grant

There are times when an Activity may be funded by more than one grant in eLINK. In these situations, the activity must be linked to both grants in the system. Linking associates the Activity and its related data, such as Activity Details and indicators, with both grants; streamlines the tracking process; and eliminates the need to double-enter the activity.

Before starting, be sure to have the Activity and the grant name and IDs available for the grant where the Activity was initially created. Next, navigate to the Workplan Activities screen of the grant to which you wish to link the Activity (usually a newer grant). To link an existing activity to a grant, select the **"Link Existing Activity to Grant"** button and a new window will open.

Link Activity to Grant

The link Activity to Grant screen allows you to link an existing activity associated with a another grant to the grant you are currently working on. This feature prevents you from needing to double enter the activity and will associate all the activity and its related data, such as details and indicators, to this new grant. For competitive grants you can either associate the activity directly with the grant or associate the activity with grant through an activity that was included in your original grant application under the Activity and Budget screen.

1. Step 1. Select the Grant you would like to associate an existing activity with.

P16-8700 2016 - Local Water Management - NRBG (Stormy County)

1b. Not shown. Pops up when a competitive grant is selected in Step 1.

2. Step 2. Enter the existing Activity to associate with this Grant. This would include any activity associated with your organization.

Note: After saving and closing this dialog box, you will need to click the "Add Activity Budget" button and enter a dollar amount before the linked activity will appear in the grid.

3.

Save   Close

---

1. **Step 1**: Select from the dropdown the grant you would like to link the activity to.

> **Step 1b (Competitive Grants Only)**: Grants that originated in the system through an application will have this step which establishes a connection between the planned indicators of an activity in the application and the final indicators of the linked activity. Select the proposed activity entered during your original application under Activity and Budget if the linked activity to be selected in step 2 will be applied to the planned indicators of this activity. Select "Activity Not Associated with Original Grant Application" if the linked activity to be selected in step 2 does not need to be applied to the planned indicators of the original application.

2. **Step 2**: Start typing the activity name in the auto-complete field and select the activity to associate with this grant. This may take a moment. The list of activities includes all activities with which you are associated, starting with the grant ID under which the activity was originally entered in eLINK.

3. Select the Save button, then the Close button.

4. The activity is now linked, but will not appear in the Workplan Activities screen until you have added an Activity Budget for the grant. Select the Add New Activity Budget button and the activity selected in Step 2 above will now appear in the activity list for this grant. (See *Managing Activities: Adding New Activities/ Activity Budgets* on page 4 for more information.)

Progress Reporting

Progress Reports include entering and updating activity information where progress has been made, and submitting the report through the Progress Report function. Progress reports may also require the attachment of additional documentation in support of the reported activities of the grant and/or to support reimbursement requests, such as a Financial Report.

The deadline for Progress Reporting varies by grant program and the terms of the grant agreement; however, generally reports are required:

* Annually by February 1st

* At the 40% payment request for competitive grants

* Within 30 days of the end of the grant agreement, or expenditure of all grant and match funds, whichever occurs first

The first step in progress reporting is to enter and/or update activity information where progress has been made; including entering new activities, entering expenditures made on activities, providing additional information or details about activity accomplishments, and mapping and entering final estimated indicators as appropriate for completed projects. For instructions on how to create and/or update activity information, see the *Managing Activities* section of the eLINK Cookbook starting on page 3, or the eLINK Guidance Document: *Managing Activities*.

This section of the eLINK Cookbook will outline how to create and submit a progress report, generate financial reports, add attachments, and return funds (when applicable). For more information on Progress Reporting see the eLINK Guidance: *Progress Reporting*.

Progress Reporting: Adding a New Progress Report

After Activities of the grant have been updated to reflect actions and expenditures since the previous report, users can access the progress reporting module from the home page by clicking the **Progress Report** icon for the grant.

Users can also access the progress reporting module from the Workplan Activities screen by clicking on the **Grant Title** in the workplan activities grid (shown below), which will bring the user to the Grant window. In the Grant window, the user selects the **Progress Report** tab (not shown).

Home / Grant / Progress Report

Grant Id: P16-8700
Allocation Type: LWM-NRBG
Stage: Application - Award Finalize

Grant Title:
2016 - Local Water Management - NRBG (Stormy County)
Amount Awarded: $8,000.00
Status: [▼] Go

Organization: Stormy County
Go to Workplan

| Grant | Grant Map | Application Budget | Team Selection | Progress Report | Attachments |

Add New Progress Report

Displaying 0 - 0 of 0 results

ENTRY TYPE	CREATED DATE	CREATED BY	GRANT STAGE	GRANT STATE	ACTION

Show 5 10 25 50 100 results per page

Click the **"Add New Progress Report"** button, and you will be taken to the Create Progress Report screen.

Create Progress Report

1. Progress Entry*

2. Progress Report Type*

3. Payment Amount Requested $

Unpaid Funds Remaining: $38,715.00

40% Payment Amount: $154,858.40

10% Payment Amount: $38,714.60

4. Save Cancel / Go Back

---

1. Enter information in the **Progress Entry** box that the Board Conservationist should know about the progress report. Examples include: "Annual progress report"; "No funds spent in CY 2017"; "Greater than 50% of the grant has been spent and we are requesting the 40% installment."

2. Select from the following options for the **Progress Report Type** (not all options are available for all grants).

    a. *Interim Report*: interim progress reports can be submitted at any time for all grants.

    b. *Interim Report w/Payment*: for interim progress reports on grants when a reimbursement payment is requested. You will also need to enter the Payment Amount Requested, and attach a financial report.

    c. *Final Report*: for finalized grants with no payment requests or funds to return. This must be accompanied by attachment of a financial report. An approved Final Progress Report will become a closed grant, which can no longer be edited.

    d. *Final Report w/Payment*: for finalized grants when a reimbursement payment is requested. You will also need to enter the Payment Amount Requested, and attach a financial report. After the payment is processed by BWSR, the grant becomes closed and can no longer be edited.

    e. *Final Report w/Funds Returned to BWSR*: for finalized grants with funds to return. Selecting this option will require the user to enter the amount of funds to be returned and the check number. A Returned Funds Form can then be printed. (See *Progress Reporting: Returning Funds* on page 22 for more information.) This progress report must also be accompanied by attachment of a financial report. After receipt of the refund amount and processing in Grant Agreement Management, the grants becomes closed and can no longer be edited.

3. If your grant is paid out on a reimbursement basis, or advance/reimbursement basis, this page will display the **unpaid funds remaining**, and ask you to enter the Payment Amount Requested as part of the progress report. An amount only needs to be entered when submitting a report requesting payment.

4. Click "Save" in order to save the Progress Report. You should see a message indicating the progress report was successfully created.

5. **DO NOT FORGET TO SUBMIT**. See below.

The final step is to change the **Status** of the grant progress report to "Submitted". This is accomplished by selecting **"Submitted"** from the grant status dropdown list in the upper part of the page and then clicking the **"Go"** button. Setting the grant status to "Progress Report – Submitted" will generate a PDF of copy of your

Progress Reporting: Returning Funds

When funds need to be returned for finalized grants the user must select "Final Report w/Funds Returned to BWSR" under the Progress Report Type. When this option is selected additional fields will appear in the Create Progress Report window and require the user to enter the **Refund Amount** and the **Check Number**. After those fields have been completed the user must first **Save** the Progress Report, and then can click on the **Generate Report** button to generate the Returned Funds Form. The form can then be printed and sent with the check to the address on the form.

Progress Reporting: Financial Reports

Financial Reports are required to accompany all final progress reports (Final Report, Final Report w/Payment, Final Report w/Funds Returned to BWSR) and interim progress reports where a reimbursement payment is requested (Interim Report w/Payment). This is accomplished by generating the Financial Report in eLINK, having it signed by the Official Signature (see the *About the BWSR Grants Administration Manual* section of the Grants Administration Manual), and attaching the report into eLINK.

To generate the Financial Report click on the **Generate Financial Report** icon on the Home screen. The report is generated as a Microsoft Word document and you will be prompted to Open or Save the document. Open the report and review it for accuracy. If the report is accurate, print it off so it can be signed by the Official Signature. If the report appears to be inaccurate, make sure all of the activities and expenditures were entered correctly, and contact your Board Conservationist if you have questions.

Once the Financial Report has been signed by the Official Signature, scan the report and save it to a location of your choosing so it can be attached into eLINK.

 Note: The Financial Report can also be accessed through the Quick Reports module on the Home page by entering the Grant Title, selecting "Financial Report" under the Grant Reports dropdown, and clicking on the "Go" button. (Not shown)

New in 2018, the Financial Report can also be accessed from the Progress Report tab and Workplan Activities screen by clicking on the Generate Financial Report button.

Progress Reporting: Attachments

There are two different options for adding attachments into eLINK. The first option is to add the attachment through the Progress Report module. When a new progress report is added and saved as described under *Progress Reporting: Adding a New Progress Report* starting on page 18, the Progress Report window will expand to include an **"Add New Attachment"** button. Click on that button.

1. **Document**: Click **Browse** and locate the document you wish to attach where you saved it.

2. **Document Type**: Select "Progress Report" for the type.

3. **Document Name**: Give the attachment a name, such as "Financial Report" or other appropriate name.

4. **Description**: Enter a description for the attachment. (optional)

5. Click "Add Attachment" to save.

The Progress Report can now be submitted.

This add attachment option is not available after the progress report has been submitted.

The other option to add attachments is through the Attachments tab in the Grant window. Click on the **Edit** icon in the Grants table on the Home screen. Then click on the **Attachments** tab.

Click on the **"Add New Attachment"** button.

1. **Document**: Click **Browse** and locate the document you wish to attach where you saved it.

2. **Document Type**: Select "General Attachment" for the type.

3. **Document Name**: Give the attachment a name, such as "Financial Report" or other appropriate name.

4. **Description**: Enter a description for the attachment. (optional)

5. Click "Add Attachment" to save.

Progress Reporting: Successful Completion

Progress Reporting submittal is complete once all the activity and expenditure information has been updated for a grant; a progress report has been created and submitted; and the financial report (if applicable) has been generated, signed, and attached. The Board Conservationist will review the Progress Report, and either approve or request more information. If more information is requested, the Board Conservationist will provide detail on what additional information is needed. Board Conservationist approval of the Progress Report signifies successful completion of eLINK reporting requirements.