

## II. System Setup

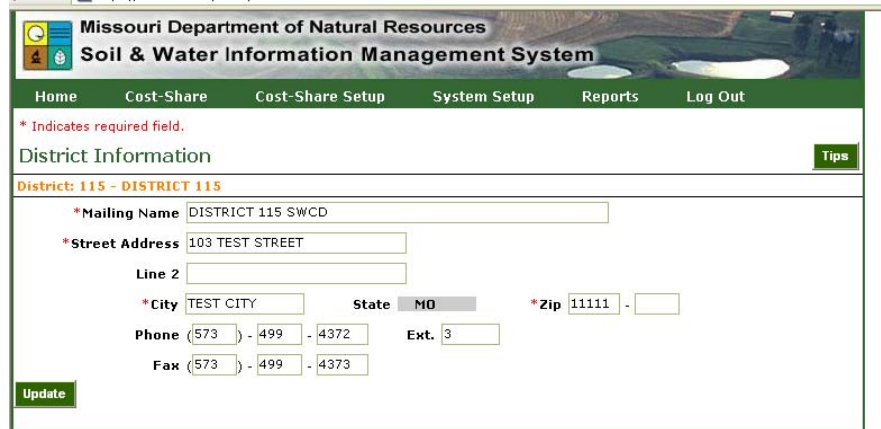
### A. District Information

**Things to Know:**

- The district’s basic information can be updated on the District Information screen.

**Enter Information:**

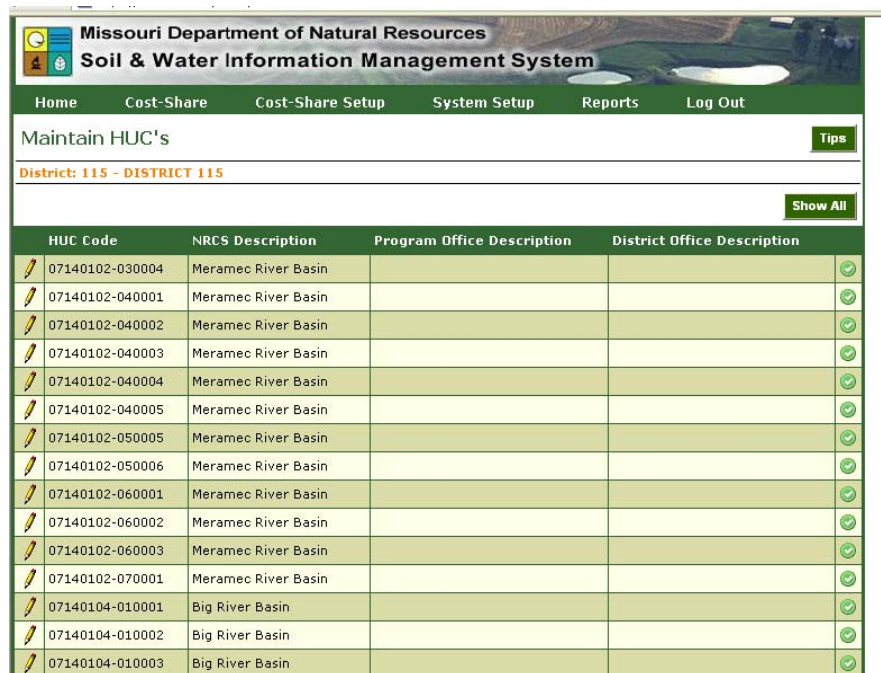
1. From the main menu, select “System Setup,” then “District Info.”
2. The mailing name, address, phone, and fax numbers for the district can be updated on this screen.
3. Click the “Update” button to save changes to the district information.



### B. District Hydrologic Unit Codes (HUC)

**Things to Know:**

- HUC codes for each district are entered by the program office.
- Only HUC codes entered for the district will appear in the grid.
- The HUC codes listed on the screen will be available on the “Maintain Farms/Tracts” screen in a drop-down.
- If a HUC code does not appear in the bottom grid, the user should contact the program office to have the HUC code added.



# MoSWIMS District Office Training Manual

## **Enter Information:**

1. From the main menu, select “System Setup,” then “Maintain HUC Codes.”
2. All the HUC codes for the district will appear in the grid.
3. To edit a HUC code from the grid, click the pencil icon next to the record to edit.
4. The information for the selected record will then fill the editor at the top of the screen.
5. The district can add a District Office Description to the HUC code.
6. Click the “Update” button to save the changes.

## **NOTE:**

- HUC codes can be made inactive at any time.
- This does not affect any contracts, change orders, or contract payments with which it is associated.

### To make a code inactive:

- Select the code from the grid by clicking the pencil icon next to the HUC code.
- Click the "Active" box, and remove the checkmark.
- Click the "Update" button to save the changes.
- To view inactive records click the “Show All” button. The records will appear at the bottom of the grid.

## **C. District Public Water Supply System (PWSS) Codes**

### **Things to Know:**

- PWSS codes for the district are entered by the program office.
- If the district has PWSS codes, they will appear in a grid at the bottom of the screen.
- PWSS codes are not associated to any specific project.
- The PWSS codes listed on this screen will be available on the Farms/Tracts Maintenance screen in a drop-down.

| PWSS ID     | Description           |   |
|-------------|-----------------------|---|
| 4191055-205 | COLD SPRING           | ✓ |
| 6010430-204 | MERAMEC RIVER         | ✓ |
| 6010716-205 | MERAMEC RIVER (SOUTH) | ✓ |
| 6010716-206 | MERAMEC RIVER         | ✓ |
| 6024293-205 | BIG RIVER             | ✓ |

## **Enter Information:**

1. From the main menu, select “System Setup,” then “Maintain PWSS Codes.”
2. If PWSS codes exist for the district, PWSS codes for that district will appear in the grid.
3. To select a PWSS code from the grid, click the pencil icon next to the record to edit.
4. The information for PWSS codes is read-only and cannot be edited.

# MoSWIMS District Office Training Manual

5. Make the code active or inactive by clicking in the “Active” box.
6. Changing the activity status does not affect contracts, change orders, or contract payments with which the code is associated.
7. Click the “Update” button to save the changes.

## D. Code Maintenance

### **Things to Know:**

- In MoSWIMS, the district can create and maintain certain codes specifically for the district.
- “Address Category Types” and “Tracking Types” are the two categories for which codes can be added and/or edited by the district.
- Districts will not be allowed to enter a duplicate or edit a program office code.

### **Add in Code Maintenance:**

1. From the main menu, select “System Setup,” and then select “Cost-Share – Code Maintenance” from the menu.
2. From the Code Categories drop-down, click on the category to add or edit codes.
3. All the codes and code information for that category will be listed in the grid.
4. To enter a new code, the user must enter the required fields of “Type” and “Type Name” into the editor.
5. The “Sort Sequence” allows users to enter a value to determine the order codes appear in.
6. The “Class” data entry field on this screen is for future use.
7. Once the appropriate information has been entered, click the “Add” button.

### **Edit an Existing Code:**

1. Click the pencil icon next to the record to edit.
  - a. If there is no pencil icon, the record was entered by the program office and cannot be edited by the district.
2. The information for the code will populate the editor in the upper portion of the screen.
3. Modify the information, then click the “Update” button.
4. Codes cannot be deleted if they are associated to an active record in the address book, contract, change order, contract payment, or in the allocations section.

### **NOTE:**

- Code Types can be made inactive at any time.
- This does not affect the contracts, change orders, or contract payments with which it is associated.

# MoSWIMS District Office Training Manual

To make a code inactive:

- Select the code from the grid by clicking the pencil icon next to the record.
- Click the “Active” box, removing the checkmark.
- Click the “Update” button to save the changes.

## E. District Tracking Codes

### Things to Know:

- After setting up the tracking types in the Code Maintenance screen, tracking codes can be used as criteria for reporting purposes.
- Districts may set up multiple “Tracking Types,” and associate numerous tracking codes with each tracking type.
- It is recommended that districts do not add codes that duplicate functionality already existing in MoSWIMS.

| Tracking Types | Tracking Codes | Description         | Active                              |
|----------------|----------------|---------------------|-------------------------------------|
| CONTRACTOR     | GROUNDWORKS    | OWNER: JOHN SMITH   | <input checked="" type="checkbox"/> |
| CONTRACTOR     | SCOTT DOZING   | OWNER: JACKIE SCOTT | <input checked="" type="checkbox"/> |
| TECHNICIAN     | JIM REYNOLDS   |                     | <input checked="" type="checkbox"/> |
| TECHNICIAN     | TROY DEXTER    |                     | <input checked="" type="checkbox"/> |
| TECHNICIAN     | PHIL WHITE     |                     | <input checked="" type="checkbox"/> |

### Enter Information:

1. From the main menu, select “Cost-Share,” then “Maintain Tracking Codes.”
2. Select a “Tracking Type Name” from the drop-down list.
3. Enter the tracking code.
4. A description for the Tracking Code can be added in the description field.
5. Click the “Add” button.
6. A message will appear that says the addition was successful or unsuccessful. This message will appear throughout MoSWIMS when adding information.
7. Upon a successful addition, the record will then appear in the lower grid.

### Edit an Existing Tracking Code:

1. To edit an existing tracking code from the lower grid, click the pencil icon next to the record.
2. The information for the record will then fill the editor at the top of the screen.
3. This information can be modified.
4. Click the “Update” button to save the changes.

### NOTE:

- Tracking Codes can be made inactive at any time.

# MoSWIMS District Office Training Manual

- This does not affect the contracts, change orders, or contract payments with which it is associated.

## To make a code inactive:

- Select the code from the grid by clicking the pencil icon next to the record.
- Click the “Active” box, removing the checkmark.
- Click the “Update” button to save the changes.

## F. District Address Book

### Things to Know:

- Districts can enter information in the “Address Book” for individuals with whom the district has contact.
- The “Address Types” that the program office and the district have set up will automatically load in the Address Type selection box.
  - Not all address records and types are associated to cost-share, but can relate to other district business such as mailing newsletters.
- To populate necessary contact fields for an “Organization” or “Individual record,” the user must choose the type that applies.
- The townships for the district are entered by the program office and appear in the “Townships” drop-down.
- The county automatically defaults to the district.
- The “Address Book” can also be accessed from the contract. This will be covered further in the “Contract” section.

### Enter Information:

1. From the main menu, select “System Setup”, then “Address Book”.
2. To add a new record, select the address type(s) that will be associated to the record.

## MoSWIMS District Office Training Manual

- a. More than one address type may be associated to a record. To select multiple address types, hold down the Control key and select the types to associate to the record.
- b. The address types for Cooperator and Legal Landowner are associated to all “Address Book” records, but can be unassociated.
3. Once the address types are selected, click the “Add” button next to the Address Type box.
4. The address types selected will move to the Selected Address Types box.
5. If an address type is incorrectly added, select the address type and then click the “Remove” button.
6. “TIN” refers to the Tax Identification Number.
7. The “Date Approved as Cooperator” is an optional field that will allow the district to enter the date the board of supervisors approved the landowner as a cooperator with the Soil and Water Conservation District.
8. The “Business Charter #” from the Secretary of State’s office is an optional field.
9. A “Company/Trust/Organization Name” or a “Last Name” and “First Name” are required.
  - a. If more than one owner is listed on the deed of the property, use the “Company/Trust/Organization Name” field.
10. An “In Care Of/Attention” may be useful if a “Company/Trust/Organization” name is entered.
  - a. This field should contain the “Company/Trust/Organization’s” primary contact.
11. Enter the address information.
12. Fill in the city, state, and zip code portion of the address.
  - a. If the address is out of the country, select “Other” from the State drop-down.
  - b. This will allow a foreign address line to display on the screen.
13. Districts can enter phone numbers, fax numbers, cell phone numbers, and an e-mail address for the record.
14. Select a “Township” from the drop-down if the district chooses to associate this information to the record.
15. The “County” field defaults to the district.
  - a. There is a drop-down in the event that a cooperator resides in a different county.
16. Upon a successful add, the record will appear in the lower grid.

### **Edit an Existing Address Book Record:**

1. Districts can search for existing address records.
2. There are two search types that can be performed.
  - a. “Names Beginning With”
  - b. “Names Containing”
3. Filter results by making a selection in the “Address Type” drop-down.
4. Click the “Search” button and the results will show in the lower grid.
5. To edit an existing address record from the lower grid, click the pencil icon next to the record.
6. The information for the selected record will then fill the editor.
7. Click the “Update” button to save the changes.
8. The update was successful or unsuccessful message will appear.
9. Additional buttons appear on the screen when a record is selected from the lower grid.
  - a. “View Cooperator Event History” button

# MoSWIMS District Office Training Manual

- b. “Maintain Farm/Tract” button
- 10. To view the cooperator’s cost-share history, click on the “View Cooperator Event History” button.
- 11. Click on the “Maintain Farm/Tract” button to open the “Maintain Farms/Tracts” screen to add or update farms for the record.

## **NOTE:**

- o Address records can be made inactive at any time.
- o This does not affect the contracts, change orders, or contract payments with which it is associated.

### To make an address record inactive:

- o Select the record from the lower grid by clicking the pencil icon next to the record.
- o Click the “Active” box, removing the checkmark.
- o Click the “Update” button to save the changes.

## **G. Farm/Tract Information**

### **Things to Know:**

- o This screen is used to associate farm and tract records with legal owners.
- o Districts will be required to enter information in the Farms/Tracts screen in order for contracts to be approved.
- o Information in the Farms/Tracts screen will load into contracts, change orders, and contract payments.
- o This screen is available from the contract and change order screen.  
This will be covered further in those sections.

Missouri Department of Natural Resources  
Soil & Water Information Management System

\* Indicates required field.

Maintain Farms / Tracts [Tips](#) [Return to Previous Page](#)

Selected Cooperator

DOOLITTLE FARMS  
133 DOOLITTLE DRIVE, DOOVILLE MO 45654

Farms/Tracts Owned By This Cooperator

| Farm # | Tract # | Section | Township | Range |
|--------|---------|---------|----------|-------|
| 7415   | 159     | 13      | 31       | 36E   |

Current Owner: DOOLITTLE FARMS [Clear Ownership](#)  
133 DOOLITTLE DRIVE, DOOVILLE MO 45654

\* Farm #  Conservation Plan Approved

\* Tract #  \* HUC

\* Section  Primary PWSS

\* Township  Secondary PWSS

\* Range

[Clear](#) [Update](#) [Delete](#)

Farms / Tracts Available for Association

Search by Name  Search by Farm #  [Search](#)

### **Enter Information:**

1. From the “Address Book” screen, open an active address by clicking on the pencil icon, and then click the “Maintain Farms/Tracts” button.
2. All the farms and tracts for the legal owner are listed in the top grid.

## MoSWIMS District Office Training Manual

3. To add a new farm or tract record for the cooperator, fill in the editor with the appropriate information.
  - a. The farm #, tract#, section, township, range, conservation plan approved date, HUC code, Primary, and Secondary PWSS codes can be entered for a record.
4. After entering the information, click the “Add” button.
5. The add was successful or unsuccessful message will appear.
6. Upon a successful add, the record will appear in the top grid.

### **Edit an Existing Farm/Tract record:**

1. To edit an existing farm/tract record from either the top or the bottom grid, click the pencil icon next to the record to be edited.
2. The information for the selected record will then fill the editor at the top of the screen.
3. Click the “Update” button to save the changes.
4. The update was successful or unsuccessful message will appear.

### **Change Ownership of a Farm/Tract record:**

1. If the ownership of a specific farm/tract is a legal owner other than the name shown at the top of the screen, search the bottom grid to look up farm/tract records.
2. The search features work the same as on the “Address Book” screen.
  - a. Users can use “Search by Name” or “Search by Farm Number.”
  - b. The results are displayed in the grid at the bottom of the screen.
3. Click on the pencil icon to see the information in the editor.
4. The current owner will be listed in the gray box.
5. To remove the current owner, click the “Clear Ownership” button.
6. Once ownership for a farm/tract has been cleared, click the “Search” button for the record to appear in the lower grid.
7. Select a record from the lower grid by clicking on the pencil icon next to the record.
8. The record will appear in the editor.
9. To set ownership to the selected cooperator, click the “Set Ownership to the Above Cooperator” button.
10. The selected name should now appear in the gray display portion of the screen and in the top grid listing the legal owner’s farms/tracts.