FLIS 2.1

Forest Legacy Information System

User's Guide

Release 2.1

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U.S. Forest Service
National Information Center for State & Private Forestry

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Introduction

Summary

The Forest Legacy Information System (FLIS) is a new version of an existing system. FLIS enhances the relationships between tracts and projects to more accurately reflect the reality of the actual Forest Legacy Program. FLIS also extends the system to monitor and document the Forest Legacy process from the initial draft stage to the final approval – a process that involves Organizational, State, Regional, and National users.

The system also provides information archives at various points as Projects/Tracts advance in status. FLIS provides tools to follow the process from initiation to conclusion, cataloguing historical reports for Projects/Tracts as they advance through the system.

System Interface

Users of the Forest Legacy Information System are authenticated and managed through the National Information Center [NIC] Portal. The NIC Portal is an application that handles all FLIS user administration (i.e. requesting and granting of accounts as well as user authentication). The NIC Portal is also the source of organization information (including organizational hierarchy). The system uses information provided by the NIC Portal to determine the “type” of the user – either National, Regional or State/Organizational. Depending on a user’s role (State/Org, Regional, or National), the system will display the appropriate homepage with the assigned read/write permissions.

Key Functionality

The major functions of the Forest Legacy Information System (FLIS) are to:

- Provide state and organizational users the ability to create/update information for Tracts that are identified as possible candidates for the Forest Legacy Program, and to associate various Tracts with Projects.
- Allow state users to submit Projects for review and approval.
- Provide functionality for Regional users to identify, select, and submit projects/tracts for funding.
- Give Regional and National users the authority to review and modify projects/tracts within their respective regions.

- Allow Monitors to enter reports for Conservation Easement tracts.

Operating Environment

The user interface is designed to support Netscape 6 and above and Microsoft Internet Explorer 5.5 – 8.0. The interface will be based on the HTML 4 standard. **JavaScript must be enabled** to allow advanced functionality to operate.

FLP Funding Workflow

General Summary

Within FLIS, tracts move through a defined workflow (see **Figure 1**). They are assigned a status at each step within the workflow. Ideally, they move from "Draft" to "Approved Completed". Tracts may have only one status at a time. In contrast, projects do not have an independent status; they simply assume the status of the lowest-status tract within the project.

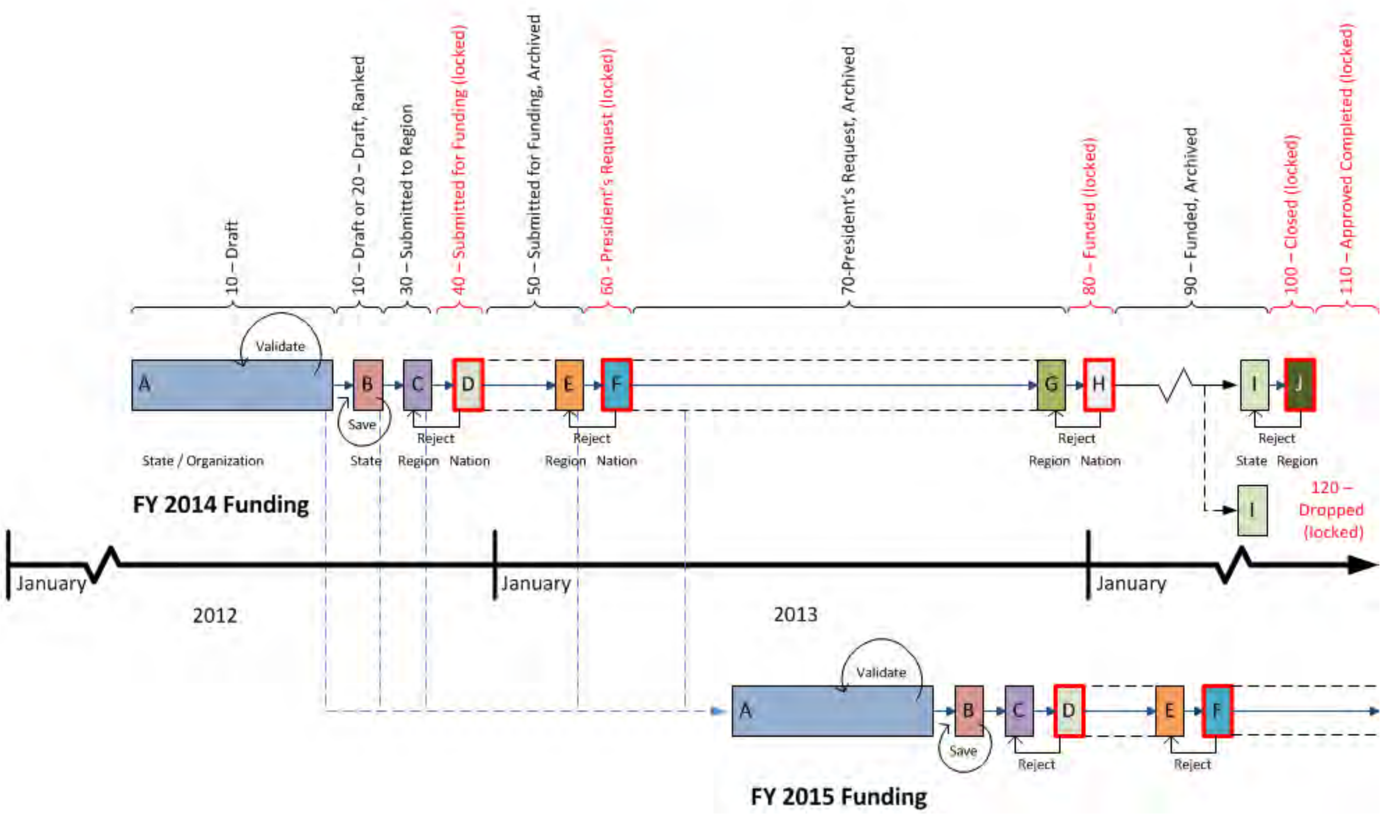


Figure 1 - Forest Legacy Program workflow as represented within FLIS.

Each step within the workflow represents stage where State, Regional, and National users must take a particular action (e.g. Submit, Approve, or Reject) to move the tract to the next or previous step. The next section includes a list of the recognized statuses with descriptions.

Tract Status Descriptions

Draft – Initial step in the workflow. It indicates the tract has not yet been ranked or submitted to region for funding consideration.

Ranked – Indicates that a tract and its associated project meet the minimum information requirements for funding consideration and the state has ranked the project. However the state has not yet submitted the project to the region for their review and approval.

Submitted to Region – Indicates the tract and associated project have been submitted to the region for review and approval.

Submitted for Funding – Indicates the tract and associated project have been submitted by the region for national funding consideration. At this stage, any project that with a tract that is “Submitted for Funding” will be locked from editing.

Proposed for Outyear Funding – This is a special status that is reserved for tracts that have been submitted for funding consideration, but represent a future phase for the project. That is the tract is proposed Forest Legacy Funding for an out year. Tracts with this status are ignored when determining project status.

Submitted for Funding, Archived – Indicates that a National User has reviewed and archived all projects that were submitted for funding consideration for a given funding fiscal year. Once archived, the projects that were locked become unlocked and may once again be edited as needed.

President’s Request – Indicates that the tract was in a highly ranked project by the Forest Legacy Program National Panel and is being proposed to Congress for funding based on the proposed President’s budget. Regional program managers are responsible for submitting a list of “President’s Request” tracts annually. At this stage, projects containing tracts with a status of “President’s Request” are locked from editing.

President’s Request, Archived – Indicates the “President’s Request” tracts submitted by the region have been reviewed and archived by the national program manager. At this stage, projects are again unlocked and may be updated as needed.

Funded – Indicates the tract has been funded. Regional program managers are responsible for annually submitting a list of funded tracts. Again, projects containing tracts with this status are locked from editing.

Funded, Archived – Indicates the “Funded” tracts submitted by the regions have been reviewed and archived by the national program manager. Again at this stage, projects are unlocked and may be updated as needed. Once funded, tracts may no longer be deleted; they may only be “Closed” or “Dropped”.

Closed – Indicates there has been a closing on the tract; a state program manager has entered all the required information into FLIS, and the tract is now pending review by a regional program manager.

Approved Competed – Indicates the closed tract has been reviewed and approved by the program manager. At this point, the tract is permanently locked from editing.

Dropped – Indicates the acquisition of this tract has failed and the identified Forest Legacy funds will not be used. Dropped tracts are also locked from editing.

Tract Display Status

Because the actions of system users move tracts through the funding workflow, it is important to have status categories that communicate to system users the exact "state" a tract is in. In contrast, key decision makers do not need to know the intricacies of this workflow. Consequently, we have collapsed the statuses described in the previous section into a simple list of "display statuses" that are used on a few key reports (e.g. Project Brief). The mapping of display status to tract status is presented in the table below.

<table>
<tr><th>Tract Status</th><th>Display Status</th></tr>
<tr><td>Draft</td><td>Draft</td></tr>
<tr><td>Draft, Ranked</td><td>Ranked</td></tr>
<tr><td>Submitted to Region</td><td>In Review</td></tr>
<tr><td>Submitted for Funding</td><td rowspan="3">Proposed</td></tr>
<tr><td>Proposed for Outyear Funding</td></tr>
<tr><td>Submitted for Funding, Archived</td></tr>
<tr><td>President's Request</td><td rowspan="2">President's Request</td></tr>
<tr><td>President's Request, Archived</td></tr>
<tr><td>Funded</td><td rowspan="2">Funded</td></tr>
<tr><td>Funded, Archived</td></tr>
<tr><td>Closed</td><td rowspan="2">Completed</td></tr>
<tr><td>Approved Complete</td></tr>
<tr><td>Dropped</td><td>Dropped</td></tr>
</table>

Getting Started

Request NIC User Account

Note: You may want to bookmark NIC Portal, or add this location to your Favorites.

1.) Navigate to the National Information Center Portal by entering the following URL (Universal Resource Locator) into your browser: http://spfnic.fs.fed.us/nicportal/

2.) From the Welcome to the NIC Portal portlet on the right, click on the “Create an Account” link.

3.) On the Create Account page, enter all required information and indicate which NIC Portal system(s) you are requesting access to, along with the role (data entry or read only) that you will need (see **Figure 2**).

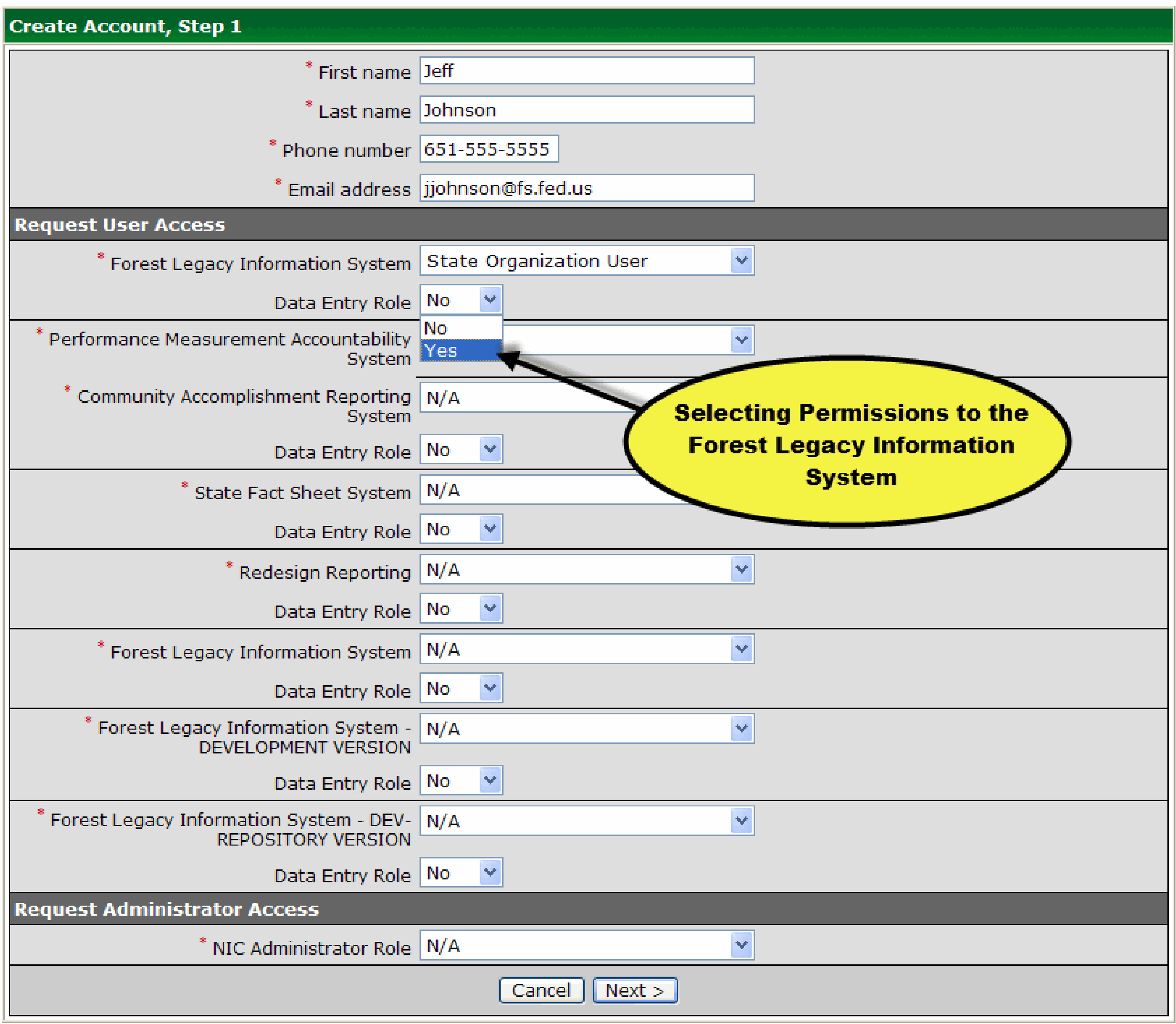


Figure 2 – Selecting NIC Account Settings and Application Permissions

4.) Click the “Next” button to review your account information.

5.) When you are sure that all of the information you have entered is correct, click the “Submit” button to request a User Account.

6.) Once your request has been approved, you should receive an email notification with an account activation code. After activating your account, you will be asked to provide an account password.

Reset Forgotten Password

In the event that you have forgotten your password to NIC Portal, you can regain access to your account by resetting the account password. Follow the steps below to reset your account password:

1.) Navigate to the National Information Center Portal by entering the following URL (Universal Resource Locator) into your browser: http://spfnic.fs.fed.us/nicportal/

2.) From the “Welcome to the NIC Portal” portlet on the right, click on the “reset your account password” link.

3.) Enter your Account ID and email address on the Reset Account Password page. Click the “Submit” button.

The Account Password Reset page will be displayed confirming that your request has been submitted. You should receive an email notification with an account activation code within 2 hours. After activating your account, you will be asked to provide your new account password.

Logging in to the FLIS Application

Note: You must have a NIC user account to login to the Forest Legacy Information System. If do not have an Account, see section

1.) Navigate to the National Information Center Portal by entering the following URL (Universal Resource Locator) into your browser: http://spfnic.fs.fed.us/nicportal/

2.) Enter your Username and Password, and click the “Login” button.

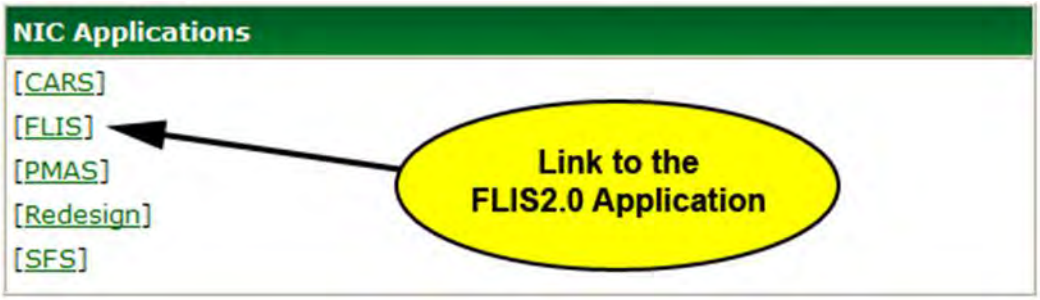


Figure 3 - The FLIS Application Link

3.) Once you have gained access to your NIC Portal account, select the "FLIS" link from the "NIC Applications" portlet (see **Figure 3**).

4.) You should now be logged into FLIS. The Homepage for your User Role should be displayed (State, Regional, or National).

Navigation

Quick Links Menu

The Quick Links menu contains a set of menu links to key areas and functions within FLIS; these links vary as the user moves throughout the State (see **Figure 4**), Regional, and National levels. These links include:

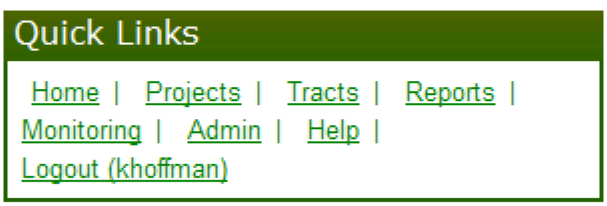


Figure 4 - The State-Level Quick Links Menu

Admin – Links to user and program contacts information, as well as system notice subscriptions.

Help – Same for all users; links to the system help.

Home – This is the user's homepage, and is displayed upon entering the FLIS application.

Logout – Logs user out of the FLIS application and directs them to the NIC Portal.

Monitoring – Displayed at the State level; links to the Monitoring page within a state. This is where users submit Monitoring reports.

Program – Displayed at the National and Regional levels; links to the Program page, from which Projects/Tracts are advanced in status and archived.

Projects – Displayed at the State level; links to pages with Project information.

Reports – Displayed at the State level; links to detailed and brief reports pages.

Tracts – Displayed at the State level; links to pages with Tract information.

Organizational Breadcrumbs and Hyperlinks

The FLIS application displays an organizational hierarchy on all pages, with hyperlinks to National, Regional, and State levels throughout the system (see the State-level breadcrumb - **Figure 5).**

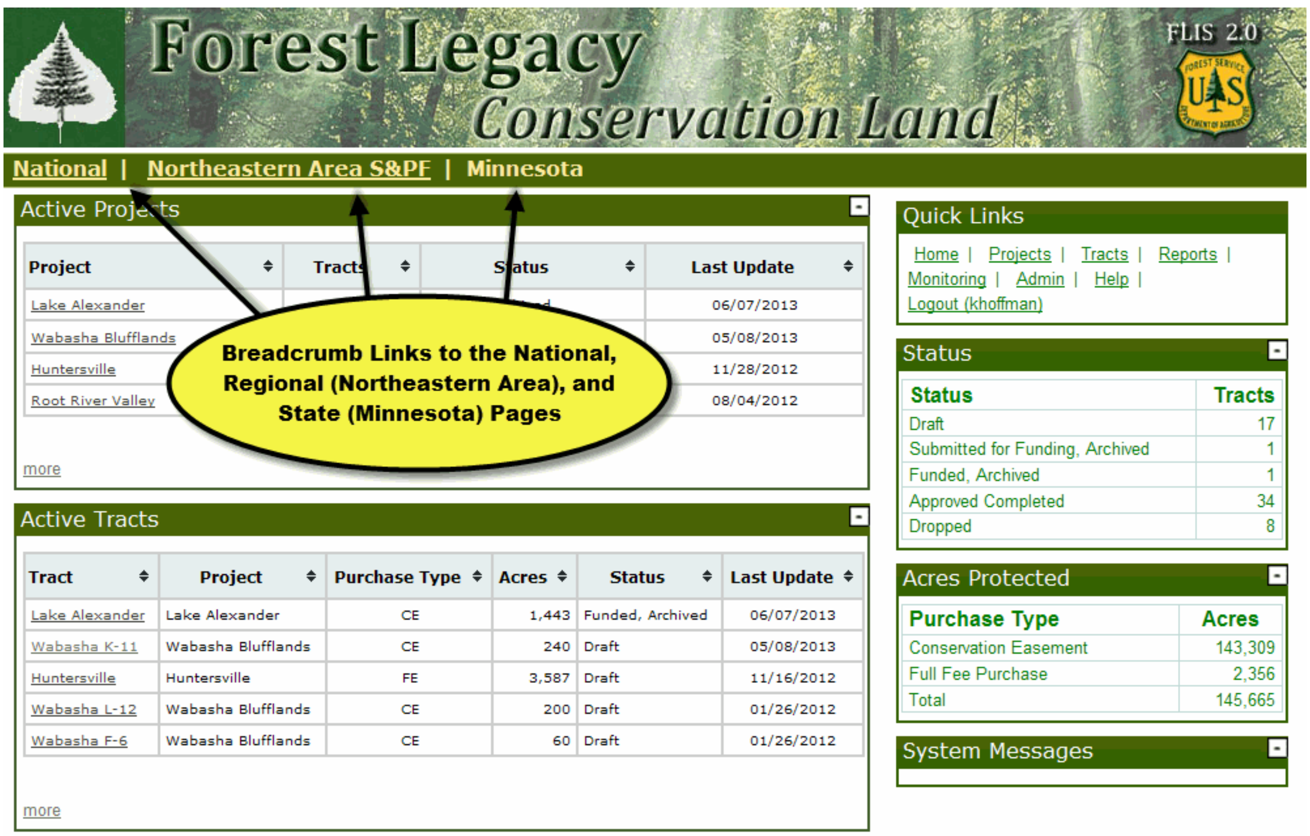


Figure 5 - The State-Level Breadcrumb Links

Using the Organizational Breadcrumb, users can access other Regions and States. State pages are linked through their respective Regions, and Regional pages are linked through the National page.

National Breadcrumb Link: This links to the topmost level in the organizational hierarchy. Regional homepages are linked through the National homepage. To access a Regional homepage, a user must first navigate to the National homepage.

Regional Breadcrumb Link: This links to the intermediate level in the organizational hierarchy; this is the homepage for Regional-level users. Users navigate to state homepages through the Regional level (see **Figure 6**).

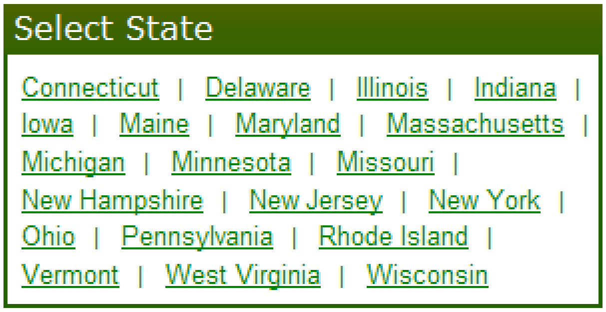


Figure 6 – The Select State Portlet

State Breadcrumb Link: This is the lowest level of the organizational hierarchy. Most data-entry occurs within the State-level scope. State homepages are accessible through their respective Region's homepage.

User Roles and Permissions

User Roles

Various roles are defined for different users of FLIS. These roles are specific to different functions that need to be accomplished at National, Regional, State, and Organizational levels.

National System Administrator: The National System Administrator is a person who has the responsibility for maintaining the Forest Legacy Information System.

National User: A National user is a member of the U.S. Forest Service with national responsibilities. A National User has access to all regions and states. A National User may complete, review and approve Project and Tract Information. A National User has read access any Tract or Project, regardless of its status. National users' primary responsibility is to archive Project/Tract information as it progresses through the Legacy funding process.

Regional User: A Regional User is a member of the U.S. Forest Service who has program oversight responsibilities. A Regional User has access to all states within the region and may complete, review and approve these states' Projects and/or Tracts. A Regional user has read access any Tract or Project, regardless of its status. The NIC Portal supports regional users that have access to more than one region. (This additional access is requested through the NIC Portal.)

State User: A State User is a member of a state forestry organization who identifies, enters and completes tract information for Projects/Tracts within their state. A State user can identify, create and edit projects, as well as associate tracts with projects. The NIC Portal supports State-level users that have access to more than one state. (This additional access is requested through the NIC Portal.)

State Monitor: A State Monitor is a State level user whose primary function within the FLIS application is to report monitoring activity for "conservation easement" tracts. State Monitors write/edit access is limited to monitoring reports for their state. All other functionality within the FLIS application is limited to read-only for State Monitor Users.

Organizational User: An Organizational User is a member of a FLIS-involved organization who identifies and inputs tract information for Projects/Tracts associated with their organization. In addition, an organizational user can identify, create and edit projects, as well as associate tracts with different projects.

Organizational Monitor: An Organizational Monitor is an Organizational-level user whose primary function within FLIS is to report monitoring activity for "conservation easement" tracts. Organizational Monitors data-entry access is limited to monitoring reports associated with their organization. All other functionality within the FLIS application is limited to read-only for Organizational Monitor Users.

Permissions

Read-Only Permissions: All users have read-only permissions for all Projects and Tracts in the system that have advanced beyond a status of "Draft". National and Regional users have no restrictions on read-only permissions (meaning, they can view information for all Projects/Tracts, including those with a status of "Draft"). State users have read permissions for "Draft" Project/Tract profiles in their state, but not outside their state. Organization users may read Draft information for Project/Tracts associated with their organization, but not others.

Data-Entry Permissions: Data-entry permissions allow write access to the application's Tract and Project information. Data-entry permissions are granted to State and Organizational Users and Monitors as appropriate to allow project formulation and reporting of tract monitoring activities. Data-entry permissions are also necessary to submit a Project/Tract to advance its status.

Note: Projects and tracts are visible to all users in the FLIS system with the following exceptions:
-State/Organization Data-Entry users: "Draft" and "Submitted to Region" tracts are not visible outside of their respective State or Organization permissions.
-Read-Only users: "Draft" and "Submitted to Region" tracts are not visible to a Read-Only user (regardless of role).

Add / Edit / Delete Project

Note: Projects and tracts are visible to all users in the FLIS system with the following exceptions:
-State/Organization Data-Entry users: "Draft" and "Submitted to Region" tracts are not visible outside of their respective State or Organization permissions.
-Read-Only users: "Draft" and "Submitted to Region" tracts are not visible to a Read-Only user (regardless of role).

Only State-Level Users and Organizational Users may create and edit Project information. However, an Organizational User must be explicitly granted permission to edit a Project created by a State Users (see User Roles and Permissions).

Adding New and Editing Existing Projects

1.) From the State Homepage, click on the "Projects" link from the Quick Links menu.

2.) Selecting/Adding a Project (see **Figure 7**).

   a. If adding a new Forest Legacy Project, select the "Add Project" link from the Project Menu portlet.

   b. If editing an existing Forest Legacy Project, select your project by name from the table in the Project list.

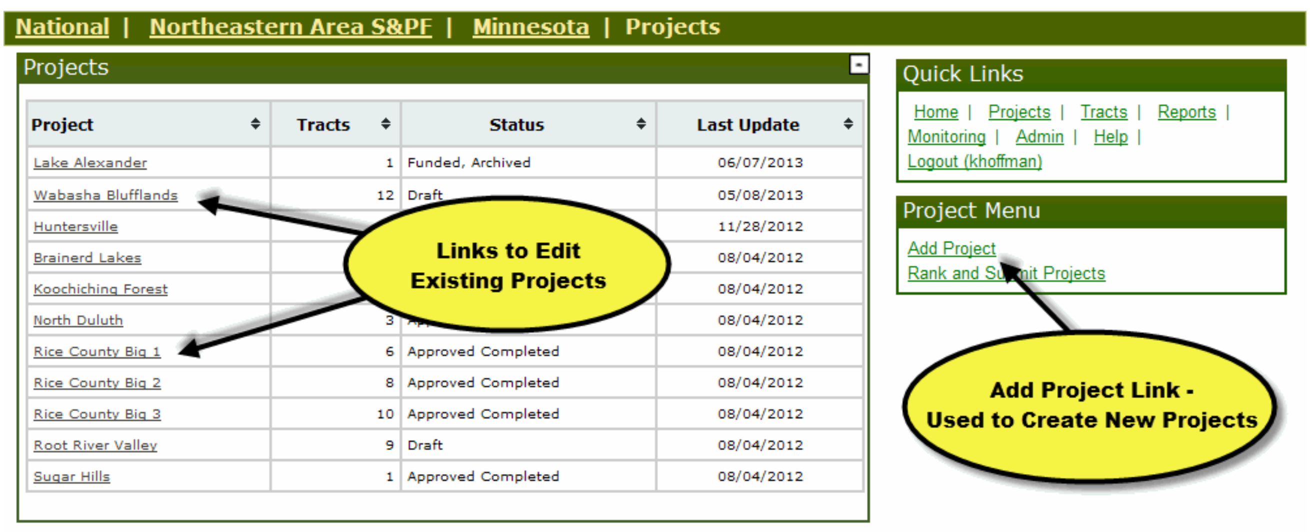


Figure 7 - Projects Page Links

The Edit Project page is broken out into a series of tabs to improve usability (see **Figure 8).** Each tab represents a different part of the same Edit Project page. A user may navigate among the different tabs without saving information. However, if a user navigates away from the tabs of the Edit Project page (such as clicking a Quick Links link), the user will be asked to save information; if the user does not save, any information entered will be lost.

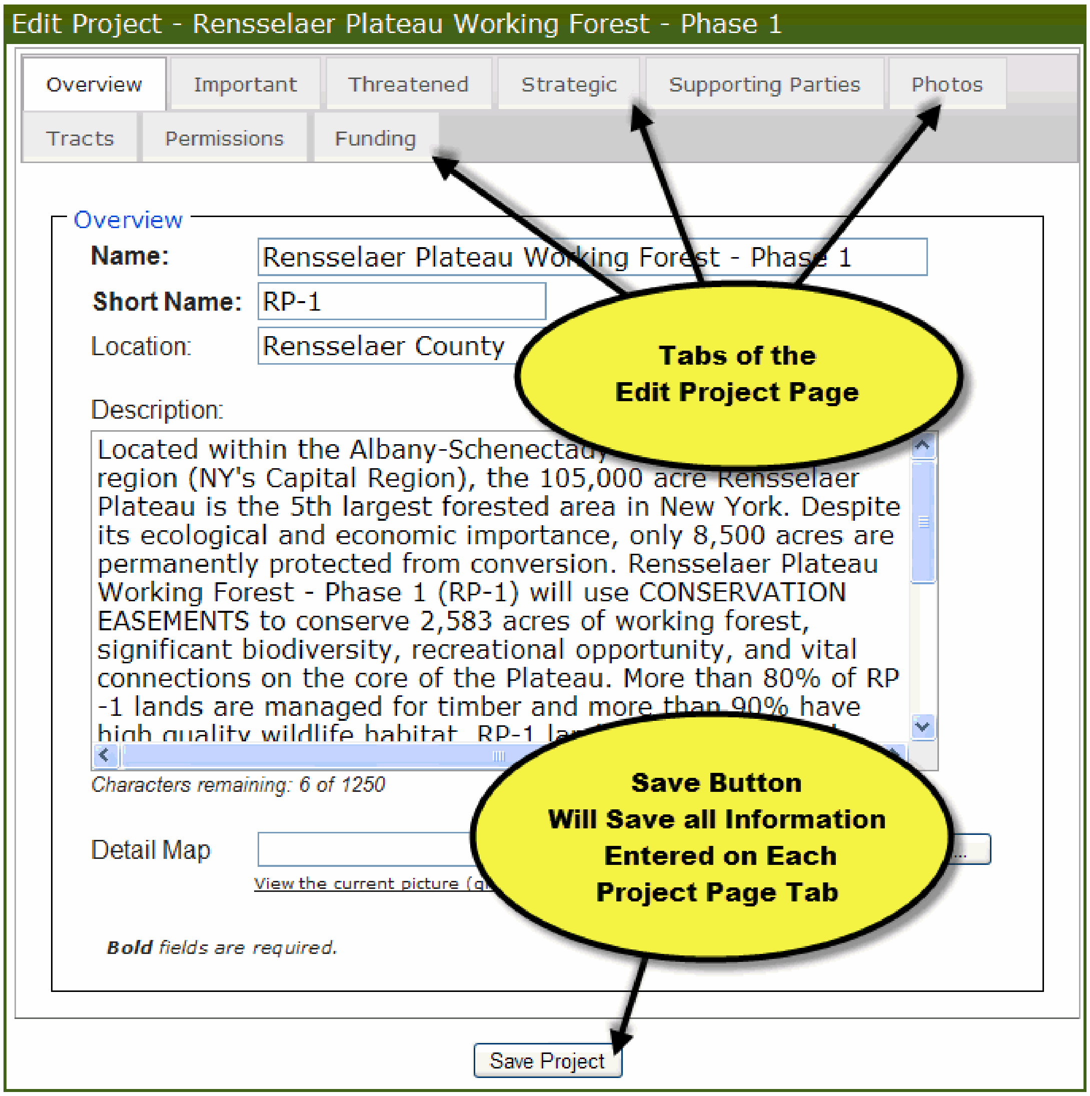


Figure 8 - The Edit Project Page Overview Tab

Project Overview

1.) By default, when a user selects a Project from the Project list (see Adding New and Editing Existing Projects), or selects to add a new Project, the Project-Overview page is displayed. In the Project – Overview tab, begin adding/editing general information about your project.

a. "Name" and "Short Name" are required fields. These fields identify your project within your state.

b. "Location", "Description", and "Detail Map" are optional fields, and are not required to save the Project's information.

Note: Detail Map must be an image type format - .pdf, .docx, etc. are not acceptable formats. If you are experiencing problems with uploading a Detail Map image, try resizing the picture to a shorter height/width and re-submit. Recommended maximum height/width is 1200 pixels.

2.) Click the "Save Project" button to store your project information in the FLIS application.

a. If any required fields have been omitted, the Project information will not be saved, and a list of errors will be displayed at the top of the Edit Project page.

Project - Importance

Project – Importance is limited to 20 items in the FLIS system. Each Importance item is limited to 300 characters.

1.) On the Project page, select the Importance tab.

a. To add a new Importance item, click on the "Add" button at the bottom of the Importance tab. A text entry form will be displayed, allowing the user to Add/Edit the text of a new Importance item. After all text has been added, click the OK button (see **Figure 9**) to commit the entered information to a temporary array of Project data stored in local memory (the information still requires saving before it is permanently stored in the FLIS system records - see Step 3). You will then be returned to the updated Project – Importance tab.

b. To edit an existing Importance record, select the desired record from the displayed list, and click on the "Edit" button. A text entry form will be displayed, allowing the user to edit the text of the selected Importance item. After all edits have been made, click the OK button to commit the entered information to a temporary array of Project data stored in local memory (the information still requires saving before it is permanently stored in the FLIS system records - see Step 3). You will then be returned to the updated Project – Importance tab.

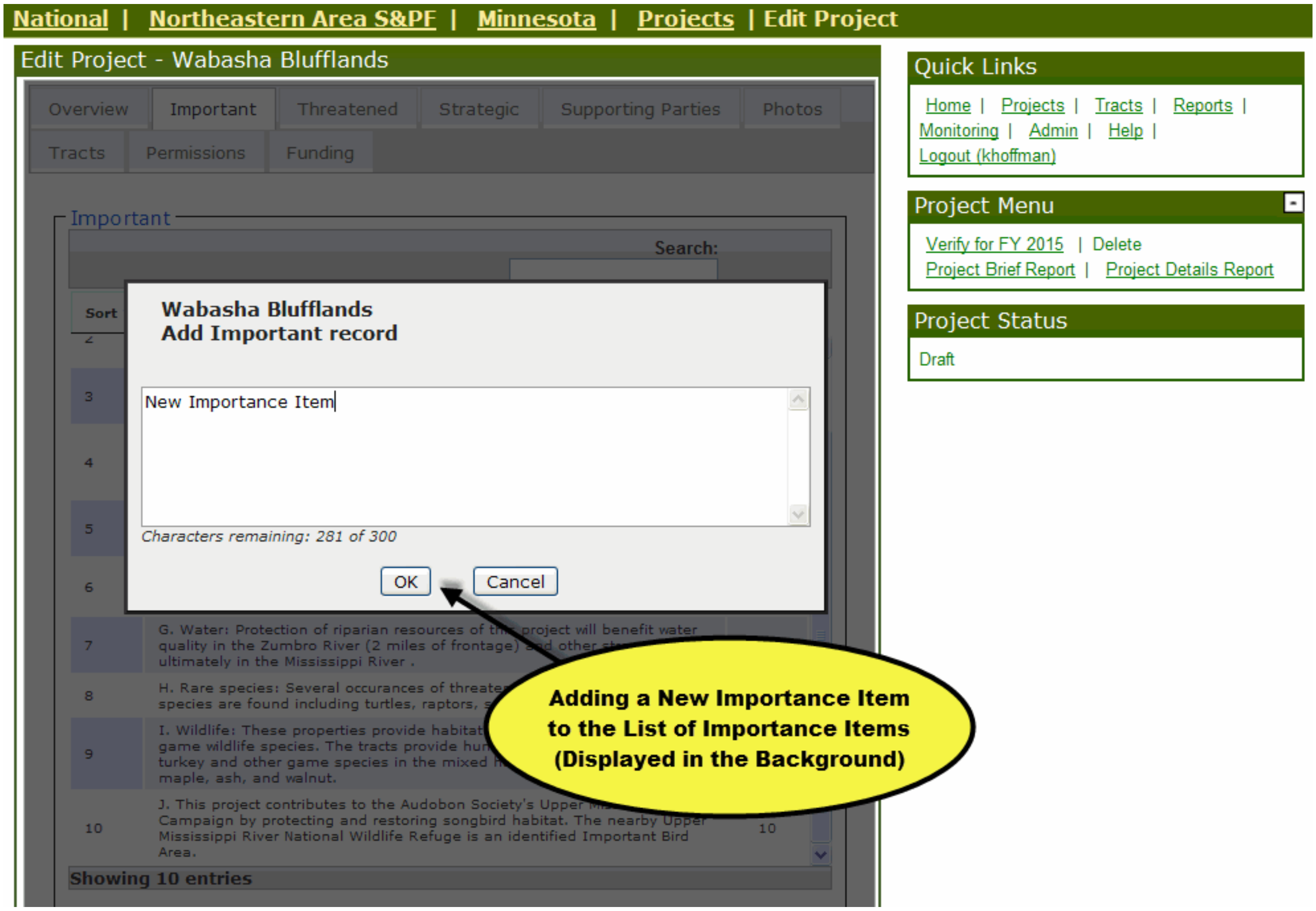


Figure 9 - Adding a New Importance Item

2.) If necessary, re-order the Importance items by using the "Up" and "Down" buttons.

3.) Click the "Save Project" button to store your project information in the FLIS application.

   a. If any required fields have been omitted, the Project information will not be saved, and a list of errors will be displayed at the top of the Edit Project page.

Project – Threatened

Project – Threatened is limited to 10 items in the FLIS system. Each Threatened item is limited to 300 characters.

1.) On the Project page, select the Threatened tab.

   a. To add a new Threatened item, click on the "Add" button at the bottom of the Threatened tab. A text entry form will be displayed, allowing the user to Add/Edit the text of a new Threatened item. After all text has been added, click the OK button to commit the entered information to a temporary array of Project data stored in local memory (the information still requires saving before it is permanently stored in the FLIS system records – see Step 3). You will then be returned to the updated Project – Threatened tab.

a. To edit an existing Threatened record, select the desired record from the displayed list, and click on the “Edit” button. A text entry form will be displayed, allowing the user to edit the text of the selected Threatened item. After all edits have been made, click the OK button to commit the entered information to a temporary array of Project data stored in local memory. You will then be returned to the updated Project – Threatened tab.

2.) If necessary, re-order the Threatened items by using the “Up” and “Down” buttons.

3.) Click the “Save Project” button to store your project information in the FLIS database.

a. If any required fields have been omitted, the Project information will not be saved, and a list of errors will be displayed at the top of the Project-Overview tab.

Project – Strategic

Project – Strategic is limited to 10 items in the FLIS system. Each Strategic item is limited to 400 characters.

1.) On the Project page, select the Strategic tab.

a. To add a new Strategic item, click on the “Add” button at the bottom of the Strategic tab. A text entry form will be displayed, allowing the user to Add/Edit the text of a new Strategic item. After all text has been added, click the OK button to commit the entered information to a temporary array of Project data stored in local memory (the information still requires saving before it is permanently stored in the FLIS system records - see Step 3). You will then be returned to the updated Project – Strategic tab.

b. To edit an existing Strategic record, select the desired record from the displayed list, and click on the “Edit” button. A text entry form will be displayed, allowing the user to Edit the text of the selected Strategic item. After all edits have been made, click the OK button to commit the entered information to a temporary array of Project data stored in local memory. You will then be returned to the updated Project – Strategic tab.

2.) If necessary, re-order the Strategic items by using the “Up” and “Down” buttons.

3.) Click the “Save Project” button to store your project information in the FLIS application.

a. If any required fields have been omitted, the Project information will not be saved, and a list of errors will be displayed at the top of the Edit Project page.

Project – Supporting Parties

At least 1 Project– Supporting Party is required in the FLIS application. Each Supporting Parties item is limited to 80 characters.

1.) On the Project page, select the Supporting Parties tab.

   a. To add a new Supporting Party, click on the “Add” button at the bottom of the Supporting Parties tab. A text entry form will be displayed, allowing the user to Add/Edit the text of a new Supporting Parties item. After all text has been added, click the “OK” button to commit the entered information to a temporary array of Project data stored in local memory (the information still requires saving before it is permanently stored in the FLIS system records - see Step 3). You will then be returned to the updated Project – Supporting Parties tab.

   b. To edit an existing Supporting Parties record, select the desired record from the displayed list, and click on the “Edit” button. A text entry form will be displayed, allowing the user to edit the text of the selected Supporting Parties item. After all edits have been made, click the OK button to commit the entered information to a temporary array of Project data stored in local memory. You will then be returned to the updated Project – Supporting Parties tab.

2.) If necessary, re-order the Supporting Parties items by using the “Up” and “Down” buttons.

3.) Click the “Save Project” button to store your project information in the FLIS application.

   a. If any required fields have been omitted, the Project information will not be saved, and a list of errors will be displayed at the top of the Project-Overview tab.

Project – Photos

Each Project has a limit of 4 photos in the FLIS application.

Note: Large photo sizes can result in slow browser performance during report generation. All photos are automatically resized during report generation; downsizing photos before uploading them to the system can improve performance. Recommended maximum width is 1200 pixels.

1.) On the Project page, select the Photos tab.

   a. To add a new Photo, click on the “Add” button at the bottom of the Photos tab. A form will be displayed (see **Figure 10**), allowing the user to browse for a photo on their local computer. In the Edit Photo Record form, text may also be entered to provide a photo caption and photo credit. After all desired information has been added, click the OK button to commit the entered information to a temporary array of Project data stored in local memory (the information still requires saving before it is permanently stored in the FLIS system records - see Step 3). You will then be returned to the updated Project – Photos tab.

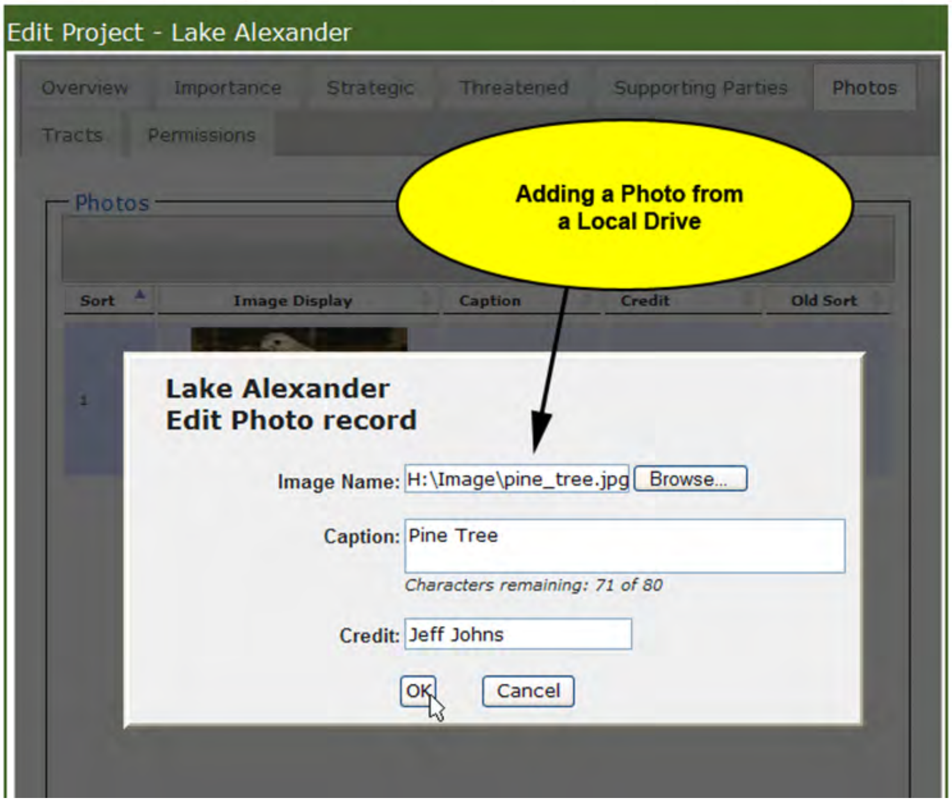


Figure 10 - Adding a Photo to a Project's Record

b. To edit an existing Photos record, select the desired record from the displayed list, and click on the "Edit" button. A form will be displayed, allowing the user to browse for a photo on their local computer. In the Edit Photo Record form, photo caption and credit text may also be edited. After all desired changes have been made, click the OK button to commit the entered information to a temporary array of Project data stored in local memory (the information still requires saving before it is permanently stored in the FLIS system records - see Step 3). You will then be returned to the updated Project – Photos tab.

2.) If necessary, re-order the Photos by using the "Up" and "Down" buttons.

3.) Click the "Save Project" button to store your project information in the FLIS database.

a. If any required fields have been omitted, the Project information will not be saved, and a list of errors will be displayed at the top of the Edit Project page.

Project – Tracts

Note: Tracts can only be assigned to one Project at a time.

1.) On the Project page, select the Tracts tab.

   a. To assign a new Tract to the Project, click on the “Add Existing Tract to Project” button at the bottom of the Tracts tab. A form will be displayed, allowing the user to browse a list existing tracts within their state. If the selected tract is already associated with a different Project, the user will be warned about breaking the existing Project-Tract assignment, as Tracts can only be assigned to one Project.

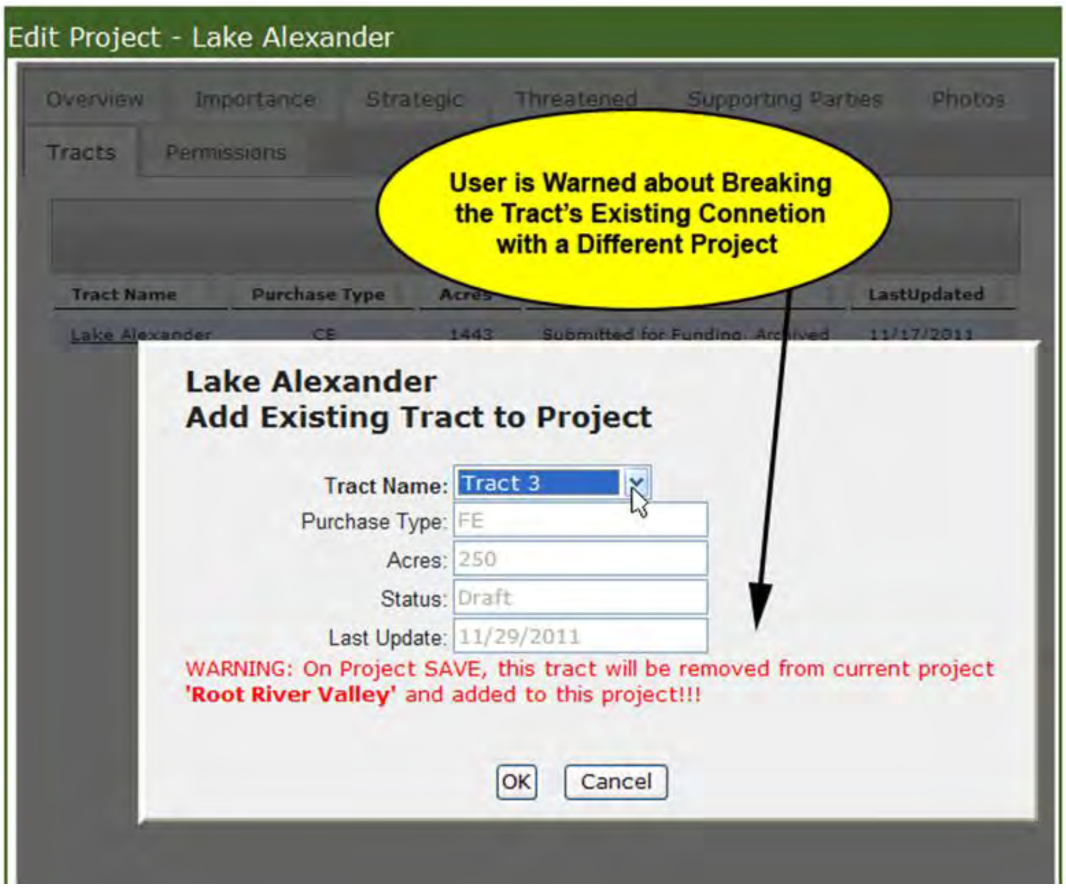


Figure 11 - Tract Reassignment Warning

   b. After a tract has been selected, click the OK button to commit the entered information to a temporary array of Project data stored in local memory (the information still requires saving before it is permanently stored in the FLIS system records - see Step 2). You will then be returned to the updated Project – Tracts tab.

   c. To create a new Tract, select the “Tracts” link from the Quick Links Menu, then click on the “Add Tract” link from the Tract Menu (see).

2.) Click the “Save Project” button to store your project information in the FLIS application.

   a. If any required fields have been omitted, the Project information will not be saved, and a list of errors will be displayed at the top of the Edit Project portlet.

Project – Permissions

By default, the current user's organization is shown at the top of the list (it will be selected and grayed out; a Project must be associated with at least one state). The remainder of the Permissions list is composed of relevant state agencies and organizations with a presence in the Project's state, and each bordering state. If you do not see the organization to which you would like to grant permissions, contact the NIC Portal support desk for assistance.

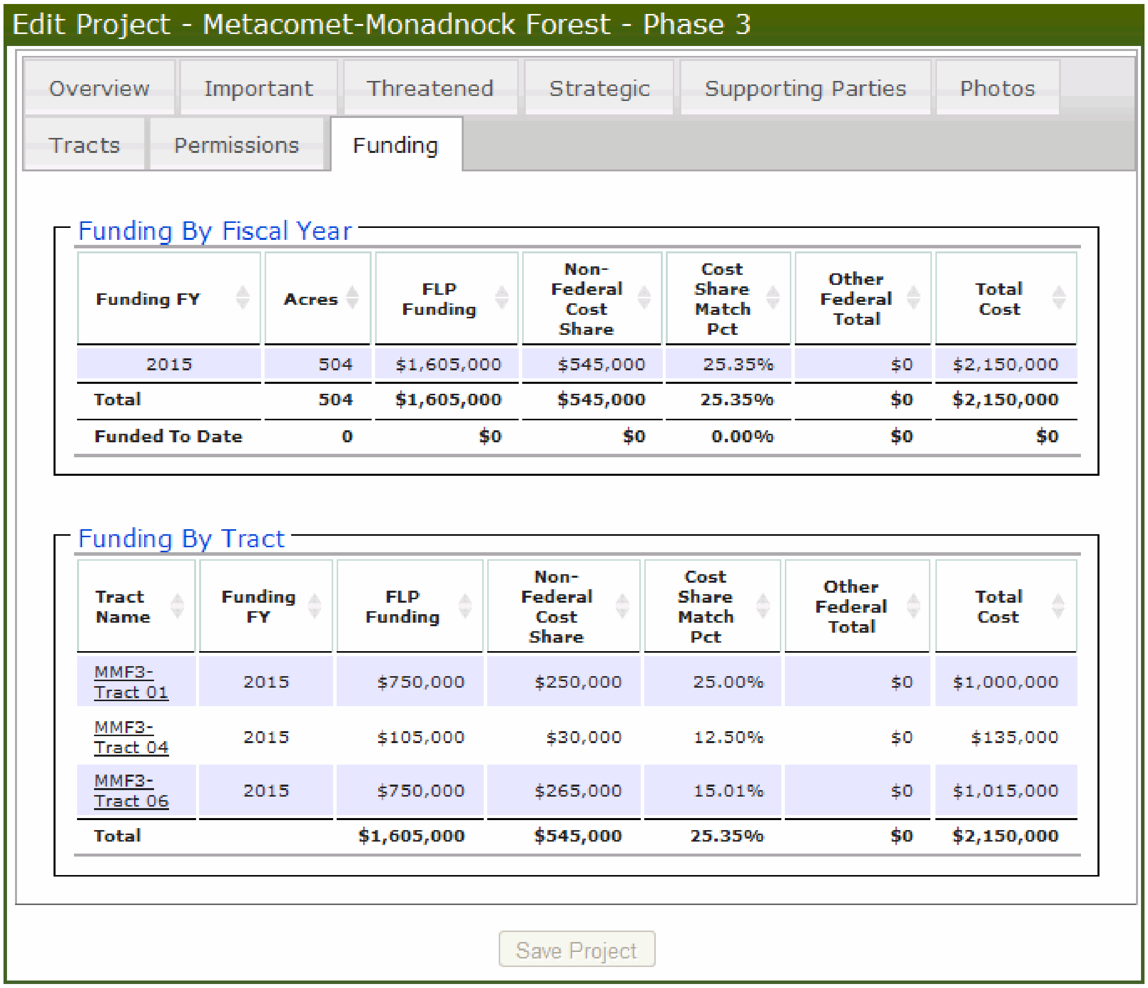
1.) On the Project page, select the Permissions tab.

   a. To add or remove permissions to access/edit the active project, simply check or un-check the appropriate checkbox next to an organization's name.

2.) Click the "Save Project" button to store your project information in the FLIS application.

   a. If any required fields have been omitted, the Project information will not be saved, and a list of errors will be displayed at the top of the Edit Project page.

Project – Funding


Edit Project - Metacomet-Monadnock Forest - Phase 3

Overview | Important | Threatened | Strategic | Supporting Parties | Photos | Tracts | Permissions | Funding

Funding By Fiscal Year

Funding FY	Acres	FLP Funding	Non-Federal Cost Share	Cost Share Match Pct	Other Federal Total	Total Cost
2015	504	$1,605,000	$545,000	25.35%	$0	$2,150,000
Total	**504**	**$1,605,000**	**$545,000**	**25.35%**	**$0**	**$2,150,000**
Funded To Date	**0**	**$0**	**$0**	**0.00%**	**$0**	**$0**

Funding By Tract

Tract Name	Funding FY	FLP Funding	Non-Federal Cost Share	Cost Share Match Pct	Other Federal Total	Total Cost
MMF3-Tract 01	2015	$750,000	$250,000	25.00%	$0	$1,000,000
MMF3-Tract 04	2015	$105,000	$30,000	12.50%	$0	$135,000
MMF3-Tract 06	2015	$750,000	$265,000	15.01%	$0	$1,015,000
Total		**$1,605,000**	**$545,000**	**25.35%**	**$0**	**$2,150,000**

Save Project

Figure 12 - The Edit Project Funding Tab

The Funding Tab contains a project-level funding summary, as well as funding information for each individual tract within the project. In order for a project to meet the minimum conditions for funding consideration (see Verify Project for Submission), the project must have at least 25% of its funding covered though Non-Federal Cost Share. The Funding by Fiscal Year table (see **Figure 12**) shows the project's Non-Federal Cost Share percentage, which is based on the combined funding totals of the project's tracts; individual tract funding information is shown below in the Funding by Tract table.

Verify Project for Submission

In order to submit a Project (and its assigned Tracts) for funding consideration, certain items of information must be present in the Project (and Tract) forms. To verify that all required information has been entered for the Project:

1.) Within the Project page (see Project Overview), click the "Verify" link in the Project Menu portlet (see **Figure 13**).

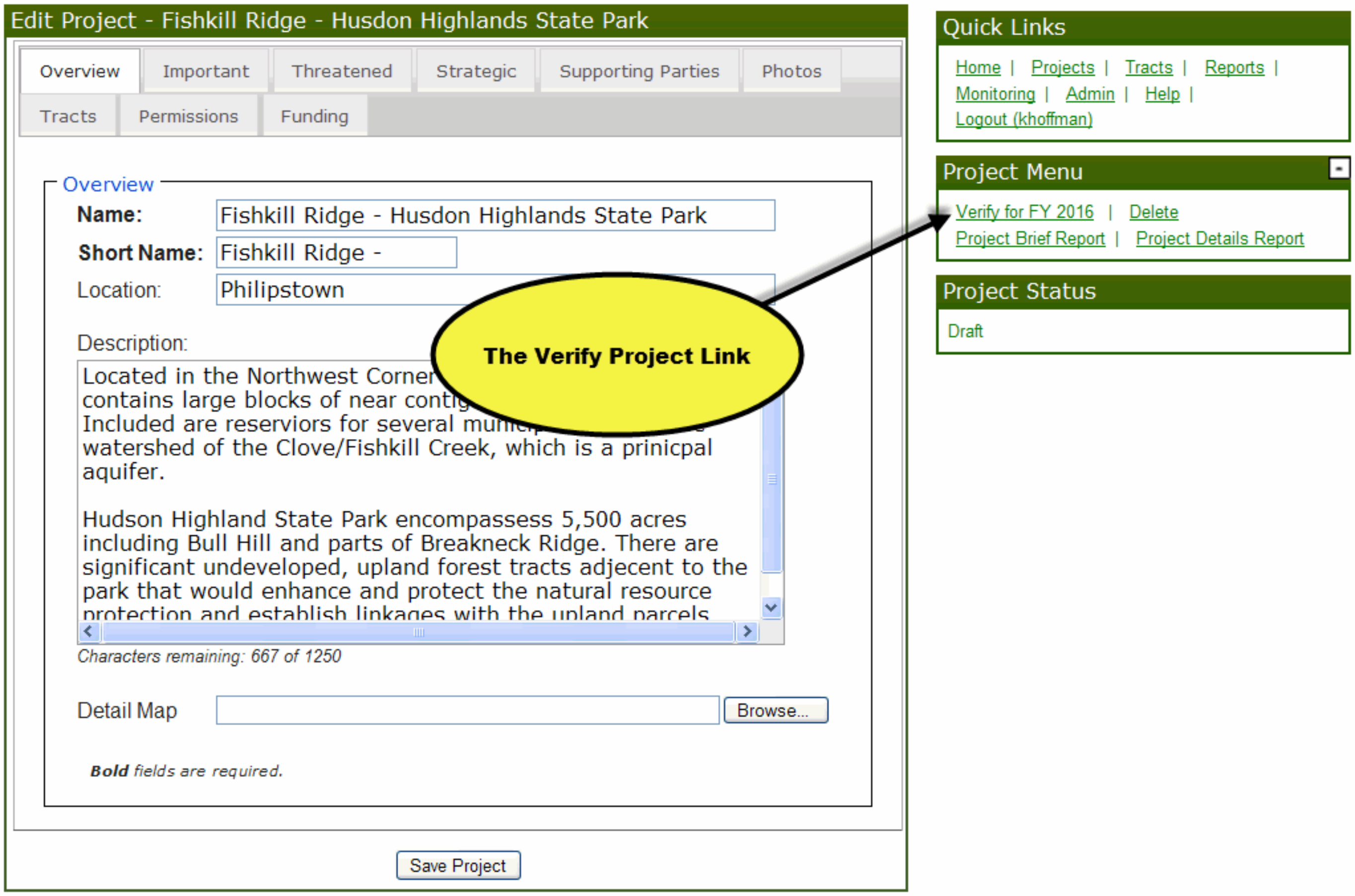


Figure 13 - The Verify Project Link

2.) A new page will pop up, displaying a summary of the Project's (and its assigned Tracts') completeness and a detailed list of issues needing attention; in some cases, a user will need to edit the accompanying Tract information, as well as any Project errors (see **Figure 14**). All of the issues identified in the Verify Project page must be addressed before a Project and its Tracts can be submitted to Regional managers for funding consideration.

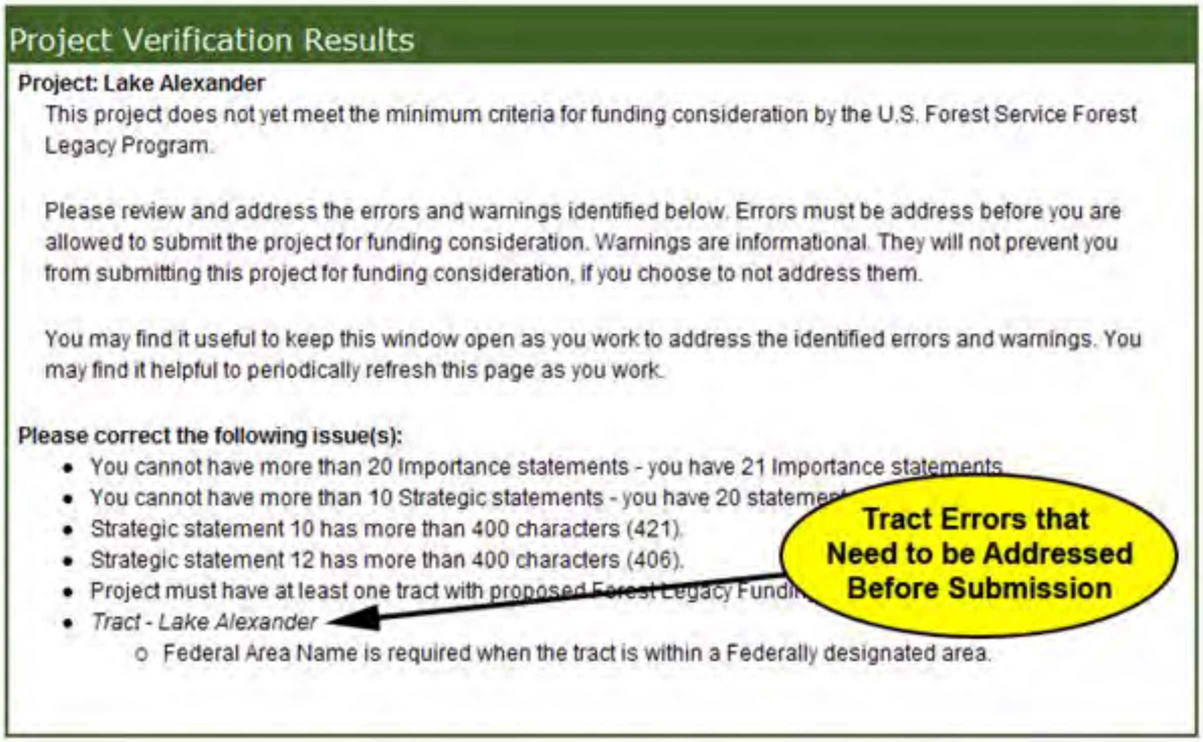


Figure 14 - The Project Verification Results Page

Delete Project

Note: A Project can be deleted depending on user permissions and Project/Tract status. See the table below for a list of Projects that can be deleted, relative to different user roles.

1.) From the State Homepage, click on the "Projects" link from the Quick Links menu.

2.) Select a Project from the list.

3.) In the Project Menu portlet, select the "Delete" option (see **Figure 15**).

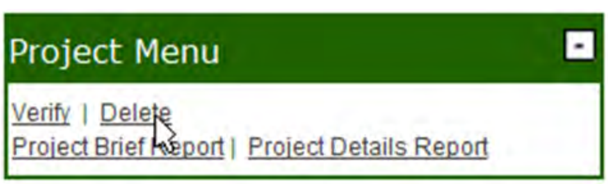


Figure 15 - The Project Menu Portlet - Delete Link

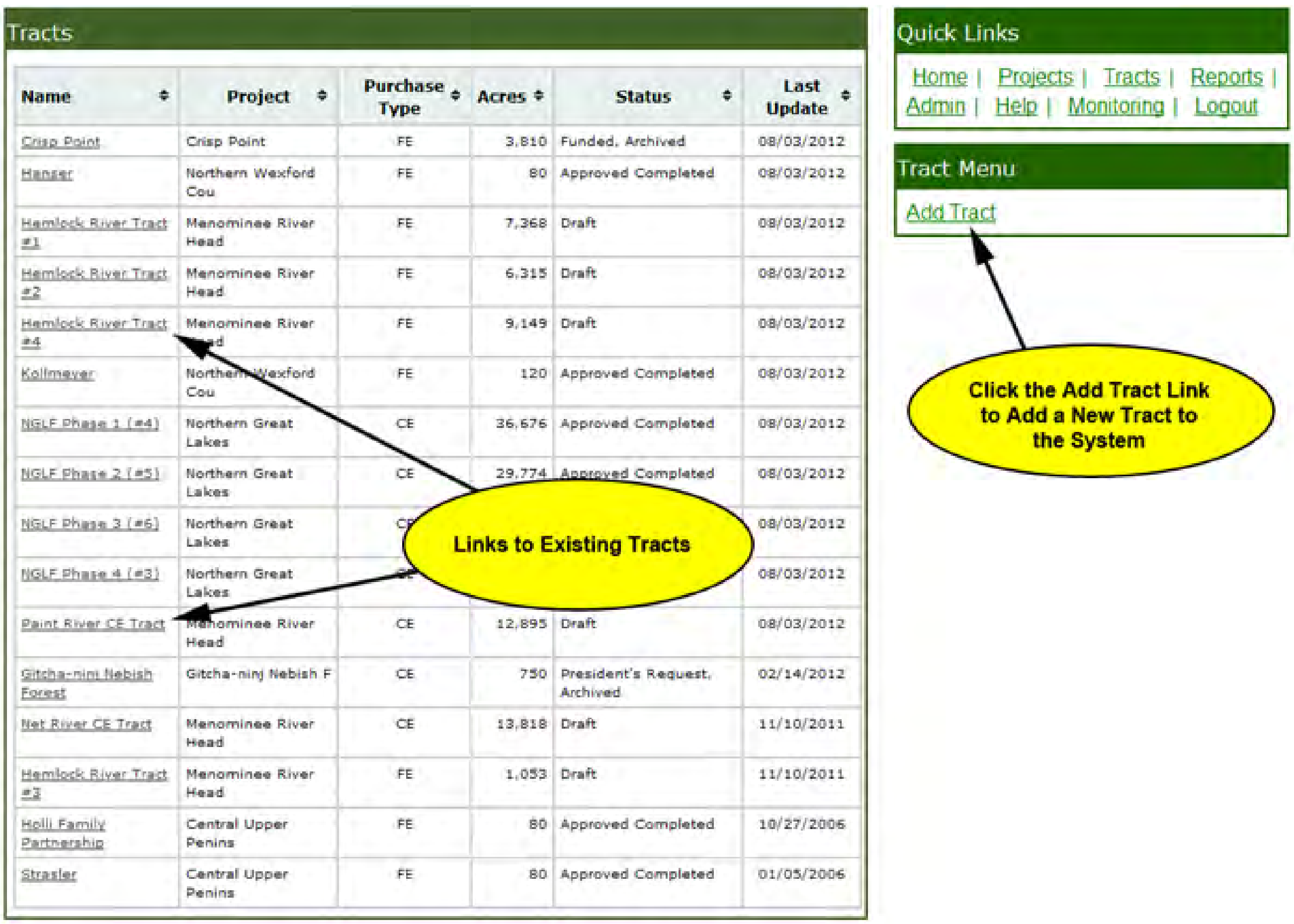
4.) On the following page, select the "Yes" option to confirm Project deletion.

Role (Data-Entry Users)	**Project Delete Privileges**
Organizational User	The user must have edit permissions for the Project; the Project contains only “Draft” tracts.
State User	The Project must be within the user’s state; the Project contains only “Draft” tracts.
Region User	The Project must be within the user’s region; the Project does not contain a tract with a status higher than “Funded”.
National User	The Project does not contain a tract with a status higher than “Funded”.

Add / Edit / Delete Tract

Note: Projects and tracts are visible to all users in the FLIS system with the following exceptions:
-State/Organization Data-Entry users: “Draft” and “Submitted to Region” tracts are not visible outside of their respective State or Organization permissions.
-Read-Only users: “Draft” and “Submitted to Region” tracts are not visible to a Read-Only user (regardless of role).

Adding New and Editing Existing Tracts


Tracts

Name	Project	Purchase Type	Acres	Status	Last Update
Crisp Point	Crisp Point	FE	3,810	Funded, Archived	08/03/2012
Hanser	Northern Wexford Cou	FE	80	Approved Completed	08/03/2012
Hemlock River Tract #1	Menominee River Head	FE	7,368	Draft	08/03/2012
Hemlock River Tract #2	Menominee River Head	FE	6,315	Draft	08/03/2012
Hemlock River Tract #4	Menominee River Head	FE	9,149	Draft	08/03/2012
Kollmeyer	Northern Wexford Cou	FE	120	Approved Completed	08/03/2012
NGLF Phase 1 (#4)	Northern Great Lakes	CE	36,676	Approved Completed	08/03/2012
NGLF Phase 2 (#5)	Northern Great Lakes	CE	29,774	Approved Completed	08/03/2012
NGLF Phase 3 (#6)	Northern Great Lakes	CE			08/03/2012
NGLF Phase 4 (#3)	Northern Great Lakes	CE			08/03/2012
Paint River CE Tract	Menominee River Head	CE	12,895	Draft	08/03/2012
Gitcha-nini Nebish Forest	Gitcha-ninj Nebish F	CE	750	President's Request, Archived	02/14/2012
Net River CE Tract	Menominee River Head	CE	13,818	Draft	11/10/2011
Hemlock River Tract #3	Menominee River Head	FE	1,053	Draft	11/10/2011
Holli Family Partnership	Central Upper Penins	FE	80	Approved Completed	10/27/2006
Strasler	Central Upper Penins	FE	80	Approved Completed	01/05/2006

Figure 16 - The Tracts Page

1.) From the State Homepage, click on the “Tracts” link from the Quick Links menu.

2.) Selecting/Adding a Tract to edit (see **Figure 16**):

a. If adding a new Forest Legacy Tract, select the “Add Tract” link from the Tract Menu.

b. If editing an existing Forest Legacy Tract, select your Tract by name from the table in the main Tracts portlet.

Tract – General

Note: The Edit Tract page is broken out into a series of tabs to improve usability. Each tab represents a different part of the same Edit Tract page. A user may navigate among the different tabs without saving information. However, if a user navigates away from the tabs of the Edit Tract page (such as clicking a Quick Links link), the user will be asked to save information; if the user does not save, any information entered will be lost.

1.) From the State Homepage, click on the "Tracts" link from the Quick Links menu.

a. "Tract Name" and "Project Name" are required fields. The "Project Name" field is comprised of a list of Project options; these are the Projects that have a presence in the state where you are creating the new tract. (Another required field is the "Funding Fiscal Year" on the Tract – Funding tab. All required information must be entered before the Tract can be saved.)

Note: A Tract can only be assigned to one Project at a time.

b. Additional information fields are optional at this time. This information can either be entered now, or the tract can be saved and edited further at a later time.

2.) After all required fields have been completed, click the "Save Tract" button to store your tract information in the database.

a. If any required fields have been omitted, the Tract information will not be saved, and a list of errors will be displayed at the top of the Edit Tract page.

Tract – Readiness

Readiness is defined as the degree of completion towards the legal transfer of property rights and/or ownership of tract land. Readiness is expressed through seven items on the Edit Tract page: Pre-Appraisal/Market Analysis, Easement or Fee Conditions, Purchase Agreement, Title Search, Mineral Determination, Stewardship Plan, and Cost Share Committed.

Each readiness item entered into a tract's profile translates into a readiness 'point'. Readiness scores, displayed on the Project Brief and Project Details reports, reflect the readiness for acquiring tract land in the current funding fiscal year (this is the year displayed just under the "Funding History" heading in the Project Brief report). Higher readiness scores can increase the chances of a project's tracts receiving funding for acquisition.

Note: If a tract has a Purchase Type of "Full Fee Purchase", a point is automatically awarded for the "Stewardship Plan" readiness item.

Although readiness values are entered in the Edit Tract page, readiness is a project-level score; projects with multiple tracts will receive a point for a given readiness item if more than 50 percent of the project's tracts have a value entered. A project can have a maximum readiness score of seven (corresponding to the seven readiness items).

Note: A project's Cost-Share Committed score depends on the percentage of funding coming from non-federal cost-share sources. If the non-federal cost-share funding percentage of the project funding total is greater than 25 percent, and the non-federal cost-share sources have been identified as "Committed" (see Tract – Funding), a point will be added to the project's readiness score.

1.) On the Edit Tract page, select the Readiness tab.

2.) In the Tract – Readiness tab, select completion dates for the indicated Readiness items; users can click the calendar icon next to the text box to select a date.

3.) Click the "Save Tract" button to store your tract information in the FLIS application.

    a. If any required fields have been omitted, the Tract information will not be saved, and a list of errors will be displayed at the top of the Edit Tract page.

Tract – Funding

1.) On the Edit Tract page, select the Funding tab.

2.) In the Tract – Funding tab, under the Forest Legacy section, enter the intended fiscal year for funding (Funding Fiscal Year).

3.) Enter the funding amount to be requested from the Forest Legacy Program.

4.) Enter the Grant Number, if funds have been allocated through the Forest Legacy Program.

5.) Under the Non-Federal Cost Share section, select the "Add" button to open a form allowing the user to Add/Edit Non-Federal Cost Share information. All fields are required.

Note: A cost share of 25 percent of overall project cost is required for Forest Legacy funding. A tract will only receive a readiness point for Cost-Share Commitment (see Tract – Readiness) if the "Commitment" field for the non-federal cost-share item is set to "Yes".

    a. After all required information has been entered, click the "OK" button to commit the entered information to a temporary array of Tract data stored in local memory (the information still requires saving before it is permanently stored in the FLIS system records - see Step 9).

6.) Under the Other Federal section, select the "Add" button to open a form allowing the user to Add/Edit Other Federal cost share information. All fields are required.

   a. After all required information has been entered, click the "OK" button to commit the entered information to a temporary array of Tract data stored in local memory (the information still requires saving before it is permanently stored in the FLIS system records - see Step 9).

7.) To edit Non-Federal or Other Federal Cost Share information, select the desired record from the list and click on the "Edit" button to open a form allowing the user to edit cost share information.

   a. When the desired changes have been made, click the "OK" button to commit the entered information to a temporary array of Tract data stored in local memory (the information still requires saving before it is permanently stored in the FLIS system records - see Step 9).

8.) Enter any notes related to funding or your organization's use of Forest Legacy Program funds in the Funding Notes text box.

9.) After all Funding information has been entered, click the "Save Tract" button to store your tract information in the database.

   a. If any required fields have been omitted, the Tract information will not be saved, and a list of errors will be displayed at the top of the Edit Tract page.

Tract – Boundary

FLIS has been upgraded to allow the submission of shapefiles that outline Forest Legacy Tract boundaries. This information is used to help generate the locator map displayed on the Project Brief report, as well as the Project Details tract preview maps.

1.) On the Edit Tract page, select the Boundary tab.

2.) Verify that your shapefile is projected to the North American Datum 1983 (commonly known as "NAD83"); ESRI ArcGIS Software may be required to verify projection information. To reproject the shapefile to the North American Datum 1983 projection, follow these steps:

   a. Open ArcMap/ArcCatalog software.

   b. Click the Toolbox button  to display the toolbox.

   c. Navigate to the "Project" tool (see **Figure 17**); double click to open the Project dialogue window.

Figure 17 - The "Project" Tool

d. In the Project dialogue window, add your shapefile to the “Input Dataset or Feature Class” field.

e. In the “Output Dataset or Feature Class” field, give a name to the output shapefile, and set it to save on a local drive.

f. Click the Lookup button  next to the “Output Coordinate System” field. In the Spatial Reference Properties pop-up window, click the “Select” button.

g. In the Browse for Coordinate System pop-up window, navigate to: Geographic Coordinate Systems\North America\North American Datum 1983.prj

h. Highlight the .prj file and click the “Add” button. Afterwards, the Spatial Reference Properties window should match **Figure 18**.

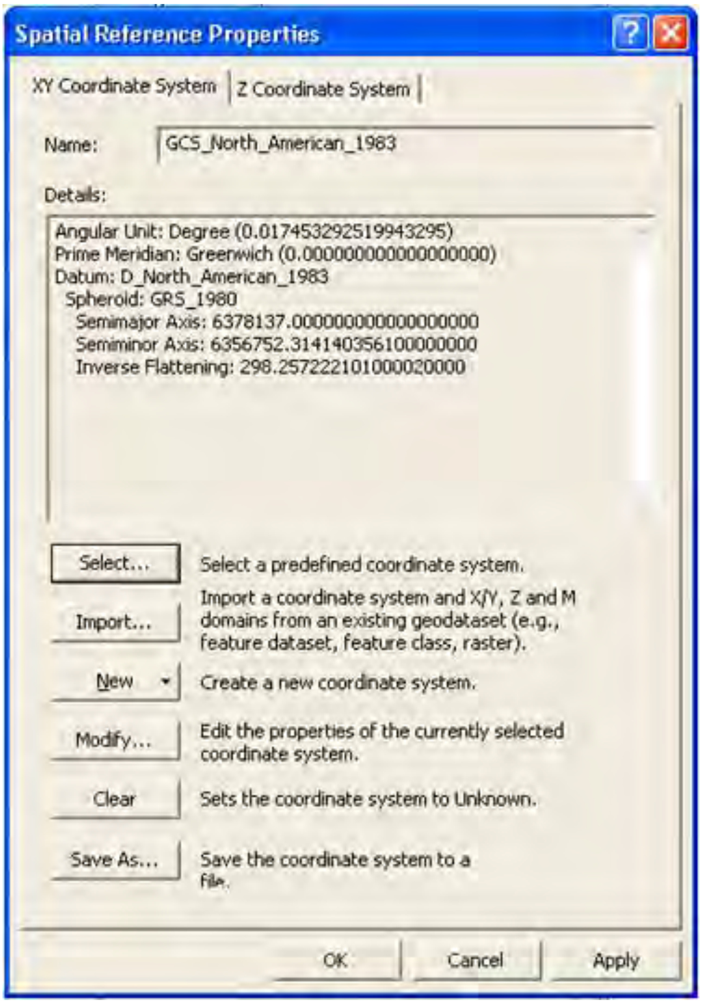


Figure 18 - The Spatial References Properties

i. Click the "OK" button in the Spatial Reference Properties window.

j. If necessary, select an appropriate Geographic Transformation. For more information on selecting the correct Geographic Transformation, visit: http://blogs.esri.com/esri/arcgis/2009/05/06/about-geographic-transformations-and-how-to-choose-the-right-one/

k. Click the "OK" button at the bottom of the Project dialogue window. Your reprojected output shapefile will be posted to the location specified in Step e.

3.) Bundle all files associated with your tract boundary into a .zip file (do not put the files in a folder within the zip; rather, have the files sit at the root of the zip file). Only include those files which are part of the tract's shapefile (at minimum .dbf, .prj, .shp, .shx). With the exception of the file extensions, all files associated with the shapefile must have the same name (i.e. shapefile.shp, shapefile.dbf, shapefile.prj, etc.).

4.) On the Tract-Boundary page, click the “Browse” button to select your zipped shapefile from the local directory where your zipped shapefile is located.

5.) Click the “Save Tract” button to save your Tract’s boundary information. Please be patient as the system processes your request; shapefile uploads require longer processing times.

Delete Tract

Note: A Tract can be deleted depending on user permissions and Project/Tract status. See the table below for a list of Tracts that can be deleted, relative to different user roles.

1.) Within the Edit Tract page, in Tract Menu portlet on the right-hand side of the screen, click the “Delete Tract” link.

2.) A Delete Tract Confirmation page will be displayed.

3.) Click on the “Yes” button to permanently delete the tract’s information from the FLIS application.

Role	Tract Delete Privileges
Organizational User	The User must have edit permissions for the Project that contains the tract; the Tract has a status of “Draft”.
State User	The Tract must be within the user’s state; the Tract has a status of “Draft”.
Region User	The Tract must be within the user’s region; the Tract has a status lower than “Funded”.
National User	The Tract has a status lower than “Funded”.

Monitoring

Add / Edit Monitoring Report

Note: User's with "State Monitor" and "Organization Monitor" user-role credentials can create, edit, and submit Monitoring Reports. State-level users also have these permissions.

Conservation Easement Tracts require an annual Monitoring Report to be submitted to the FLIS application. Monitoring Reports provide an opportunity for observers to record items of concern, or to subdivide/merge a Conservations Easement Tract's subdivisions.

1.) From the State Homepage, click the "Monitoring Link" in the Quick Links menu.

2.) For a full list of Conservation Easement tracts (those tracts that require annual Monitoring Reports) click the "More" link in the CE Tracts/Divisions portlet.

    a. Alternatively, if a year or more has passed since the tract's last Monitoring Report was submitted, a link to the tract's Monitoring Report form will appear in the "Past Due" portlet.

    b. If Editing an existing Monitoring Report, a link to the tract's Monitoring Report form will appear in the "Recently Filed Tract Monitoring Reports" portlet.

3.) Click the Tract Name link to access the Monitoring Report form.

4.) On the Add New Monitoring Report form (see **Figure 19**), click the calendar icon to select the Monitoring Date (the date the tract was completed or filed (on paper)).

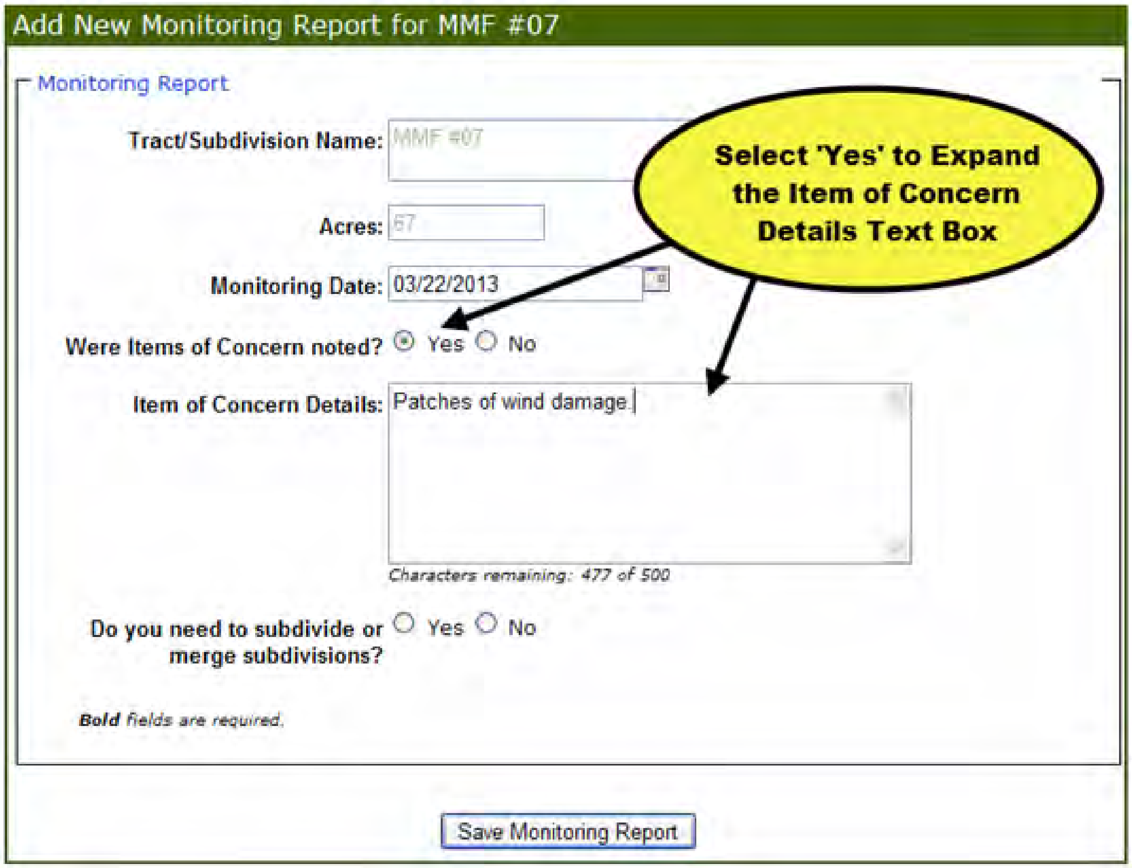


Figure 19 - The Monitoring Report Page

5.) If Items of Concern were identified on the site, select the “Yes” option.

   a. If the user selects the “Yes” option, a text box will display; enter the details of the Item of Concern.

6.) Click the “Save Monitoring Report” button to submit the Monitoring Report.

Monitoring Report Subdivisions

Note: This will not be an available option unless the “Allow Subdivision” field is set to “Yes” on the Edit Tract form for the parent tract (see Tract – General); this setting cannot be changed if the tract is in a read-only status (see Tract Status Descriptions).

A subdivision is a portion of a conservation easement tract that was divided for the purposes of sale or ownership. Within FLIS, it only pertains to the monitoring of acquired conservation easements, and only if the agreement allows for subdivision.

1.) On the Monitoring Report form (accessed by clicking a link through the "CE Tracts / Divisions" portlet on the state Monitoring homepage), select the "Yes" option next to "Do you need to subdivide or merge subdivisions".

2.) In the Subdivide/Merge Subdivision fieldset (which appears below the Monitoring Report fieldset after selecting the "Yes" option in Step 1, select the "Subdivide the Tract/Subdivision" option.

3.) In the "Sub-Divide" fieldset, enter the Subdivision Name and Acres values into the appropriate fields. After entering these values, a second line will automatically display (with the acreage count automatically calculated to match the total tract acres – see **Figure 20**).

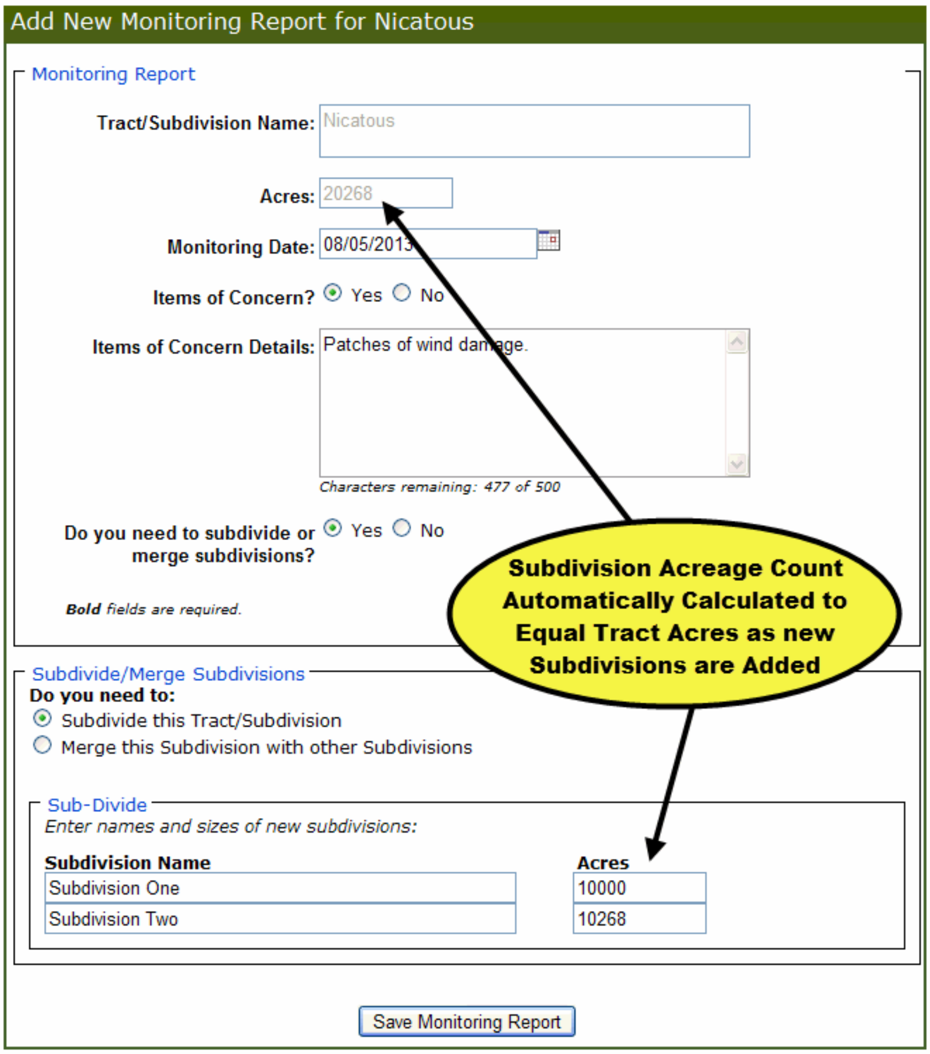


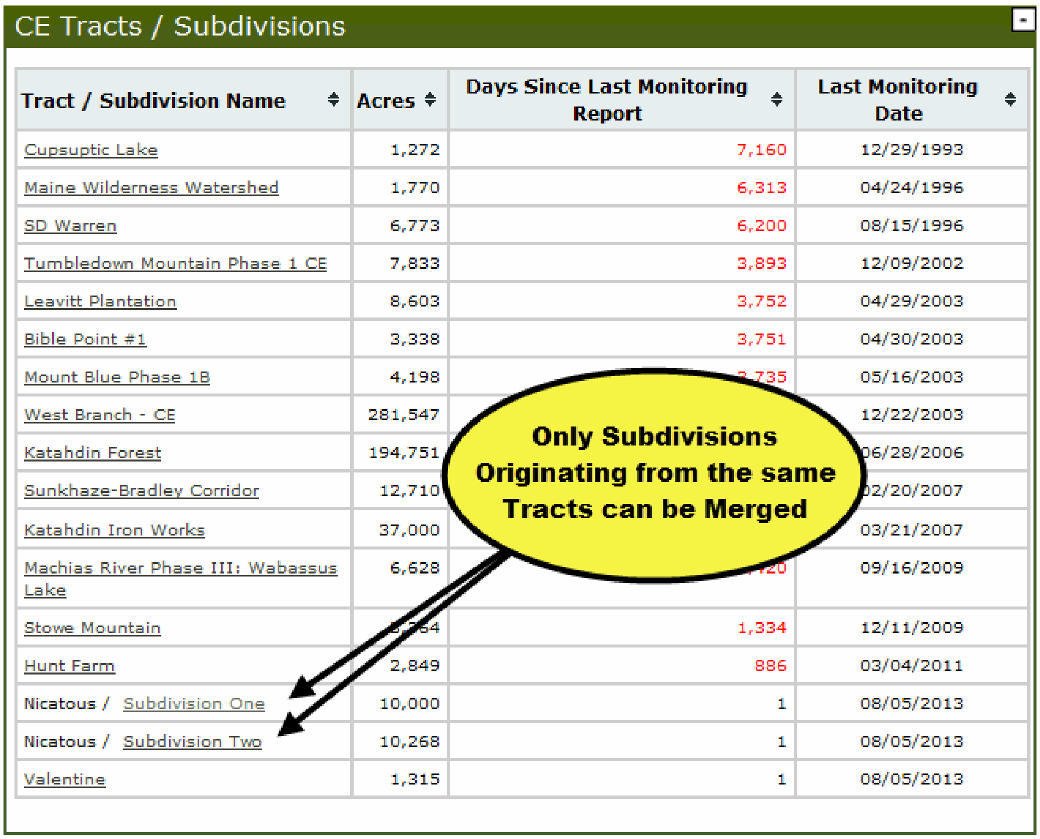
Figure 20 - Subdividing in the Monitoring Form

4.) In the "Sub-Divide" fieldset, enter the remaining Subdivision Names and acreage. Then, save the form's information. The subdivision reports will be displayed in the Recently Filed Monitoring Reports portlet on the state Monitoring homepage.

Merge Subdivisions

Note: Subdivisions can only be merged by creating a new Monitoring Report. The "Merge Subdivisions" option is not available when editing existing Monitoring Reports.

1.) From the state Monitoring Homepage (or through the full CE Tracts / Divisions list), click the link of a tract subdivision that you wish to merge with another subdivision [that originated from the same tract]; see **Figure 21**.



Tract / Subdivision Name	Acres	Days Since Last Monitoring Report	Last Monitoring Date
Cupsuptic Lake	1,272	7,160	12/29/1993
Maine Wilderness Watershed	1,770	6,313	04/24/1996
SD Warren	6,773	6,200	08/15/1996
Tumbledown Mountain Phase 1 CE	7,833	3,893	12/09/2002
Leavitt Plantation	8,603	3,752	04/29/2003
Bible Point #1	3,338	3,751	04/30/2003
Mount Blue Phase 1B	4,198	[illegible]	05/16/2003
West Branch - CE	281,547	[illegible]	12/22/2003
Katahdin Forest	194,751	[illegible]	[illegible]
Sunkhaze-Bradley Corridor	12,710	[illegible]	[illegible]
Katahdin Iron Works	37,000	[illegible]	03/21/2007
Machias River Phase III: Wabassus Lake	6,628	[illegible]	09/16/2009
Stowe Mountain	[illegible]	1,334	12/11/2009
Hunt Farm	2,849	886	03/04/2011
Nicatous / Subdivision One	10,000	1	08/05/2013
Nicatous / Subdivision Two	10,268	1	08/05/2013
Valentine	1,315	1	08/05/2013

Figure 21 - Selecting Subdivisions to Merge

2.) Enter the appropriate information into the Monitoring Form. In the "Subdivide/Merge Subdivisions" fieldset, select the "Merge the Subdivision with Other Subdivisions" options.

3.) In the "Merge" fieldset, select a subdivision(s) from the list (only subdivisions associated with the same parent tract are selectable); hold the CRTL button to select multiple subdivisions. Then, give the merged subdivisions a new name.

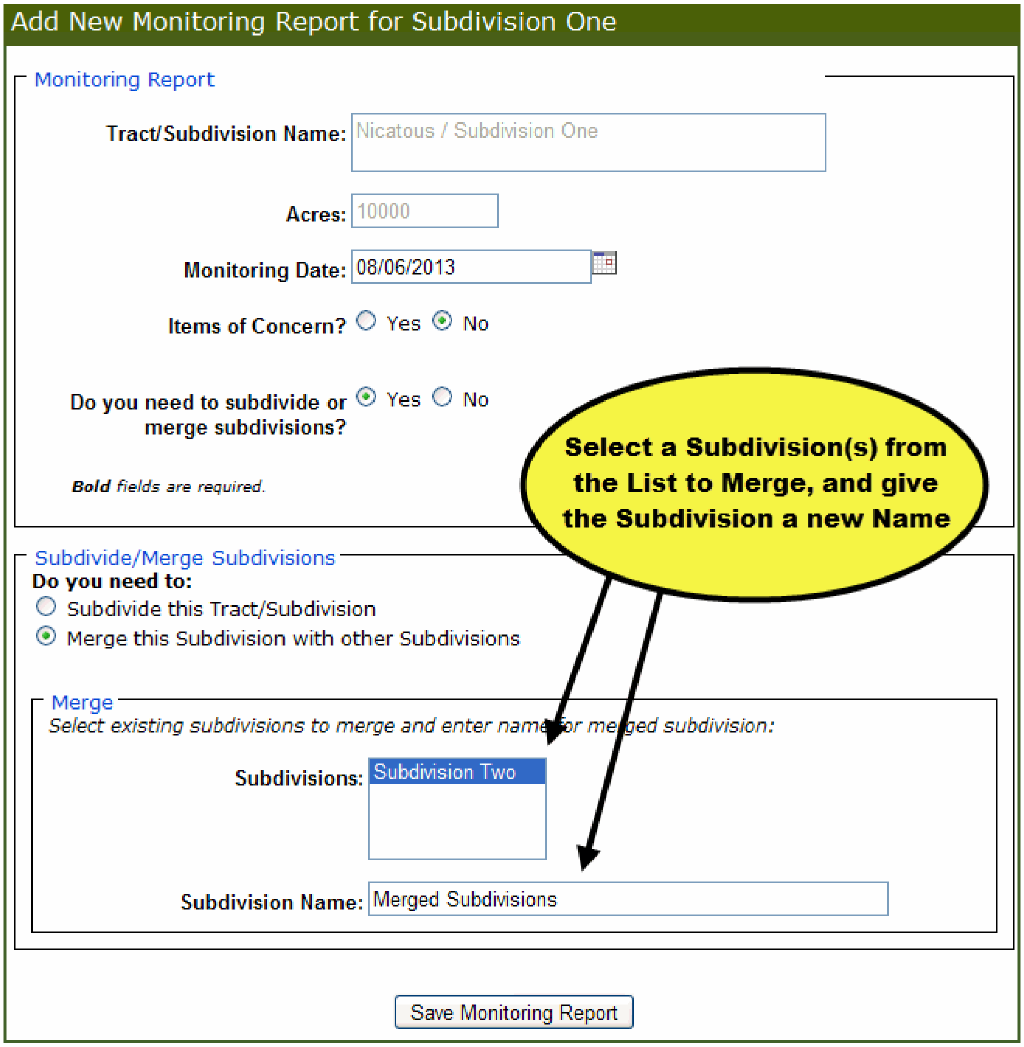


Figure 22 - Selecting a Subdivision

4.) Click the “Save Monitoring Report” button to submit the report to the system; you will be redirected to the state Monitoring homepage. A link to the Merged Subdivision’s Monitoring Report will appear in the “Recently Filed Tract Monitoring Reports” portlet.

Upload Monitoring Reports

Users can submit monitoring reports for multiple tracts/subdivisions at once. To do this, a user can download a pre-formatted spreadsheet, or create their own spreadsheet. All users with data-entry permissions for submitting monitoring reports can submit multiple reports via spreadsheet.

Note: Submitted reports will only be stored in the system if the user has data-entry permissions for the applicable tract/subdivision.

Monitoring Reports spreadsheets are to be comprised of individual rows; each row will represent a Monitoring Report for a single tract/subdivision.

Submitted spreadsheets must conform to the following specification:

Column Name	Data Type	Length	Null Values Allowed?	Description
State Abbreviation	Text	2	No	State Alpha Code, commonly used as the two character state abbreviation by the US Postal Service (e.g. MN for Minnesota).
Tract/Subdivision Name	Text	N/A	No	The name of the monitored Conservation Easement tract (or one of its subdivisions). This name must exactly match the subdivision name as it is stored in the FLIS system (these names are displayed under the "Tract/Subdivision Name" column in the CE Tracts / Divisions portlet on the state's Monitoring homepage). The record will be skipped if the name is not an exact match.
Monitoring Date	Text	150	No	Date the Monitoring Report was completed or filed (on paper).
Items of Concern	Text	2	No	Were items/issues of concern identified when the Conservation Easement tract was monitored? "Yes" or "No"
Items of Concern Details	Text	255	Yes	Explanation of the items of concern identified when the Conservation Easement tract was monitored. This cell cannot be empty if the "Items of Concern" cell is set to a positive value (e.g. Y, T, 1); otherwise, the record will be skipped.

The downloadable template spreadsheet is pre-formatted to include the columns mentioned above, as well as a list of all Conservation Easement tracts/subdivisions in the state (with blank cells under the Monitoring Date, Items of Concern, and Items of Concern Details headings – these cells are to be filled in by the user).

Note: If users choose to create and maintain their own spreadsheets for multiple monitoring report submission, the spreadsheets must conform to the standards shown above; if there are columns other than State Abbreviation, Tract/Subdivision Name, Monitoring Date, Items of Concern, and Items of Concern Details, errors will occur during submission. Skip to Step 2 if you intend to submit a user-created spreadsheet.

1.) To download a state's Monitoring Report Spreadsheet template:

   a. From the State homepage, click the "Monitoring" link in the Quick Links menu.

b. On the Monitoring page, click the “Download a blank Monitoring Data Template” link in the Monitoring Reports portlet on the right-hand side of the screen; save the file to a local directory.

c. Open the spreadsheet file using a spreadsheet editor application (such as Microsoft Excel). Downloaded templates include a list of all Conservation Easement tracts within the state, with blank cells for the reporting columns (see **Figure 23**).

State Abbreviation	Tract/Subdivision Name	Monitor Date	Items of Concern? (Yes/No)	Items of Concern Details (required if Items of Concern=Yes)
IA	Caves			
IA	Cold Air Slope			
IA	Effigy			
IA	Franklin			
IA	Lansing Big Lake			
IA	Patterson Creek			
IA	River Bluffs			
IA	Stephens Forest			
IA	Whitewater			

Figure 23 - A Blank Monitoring Report Template

2.) Enter Monitoring Report data into the spreadsheet. As you enter data, verify your entries meet the following conditions:

a. All State Abbreviations must correspond to the state where the user is operating. The system will skip any rows with a state code outside the state where the user is operating (or if the cell is blank). Downloadable templates are bundled with a list of all tracts/subdivisions in the state.

b. All Tract/Subdivision Names must exactly match their corresponding records in the FLIS system. The system will skip any rows with a Tract/Subdivision name that does not have an exact match in the FLIS system (these names are displayed under the "Tract/Subdivision Name" column in the CE Tracts / Divisions portlet on the state's Monitoring homepage).

c. All Monitor Date entries are correctly formatted as date values, and do not include any future dates.

d. The “Items of Concern” column is set to either “Yes” or “No”.

e. For any rows where the “Items of Concern” field is set to “Yes”, the “Items of Concern Details” cell must contain text explaining the issue (see **Figure 24**).

State Abbreviation	Tract/Subdivision Name	Monitor Date	Items of Concern? (Yes/No)	Items of Concern Details (required if Items of Concern=Yes)
IA	Caves	5/12/2013	No	
IA	Cold Air Slope	6/1/2013	No	
IA	Effigy	4/30/2013	Yes	Fire damage.
IA	Franklin	5/7/2013	No	
IA	Lansing Big Lake	6/1/2013	No	
IA	Patterson Creek	4/4/2013	Yes	Patches of tree wilt.
IA	River Bluffs	3/31/2013	Yes	Tornado damage.
IA	Stephens Forest	5/20/2013	No	
IA	Whitewater	6/4/2013	No	

Figure 24 - A Correctly Formatted Monitoring Report Spreadsheet

3.) Save the spreadsheet in one of the following formats: xls, csv, txt.

4.) Return to the FLIS application in an internet browser window; navigate to the Monitoring homepage for your state.

5.) On the Monitoring homepage, in the Monitoring Upload Menu portlet, click the “Upload Monitoring Reports” link.

6.) Click the “Browse” button and navigate to your saved Monitoring Reports spreadsheet.

7.) Click the “Upload Reports” button to upload the spreadsheet’s reports.

8.) After the file uploads to the system, in the Upload History portlet, click the “View Log File” link in the row that corresponds to the file you just submitted; the “Success” column denotes how many [Monitoring Report] rows were accepted by the system (see **Figure 25**).

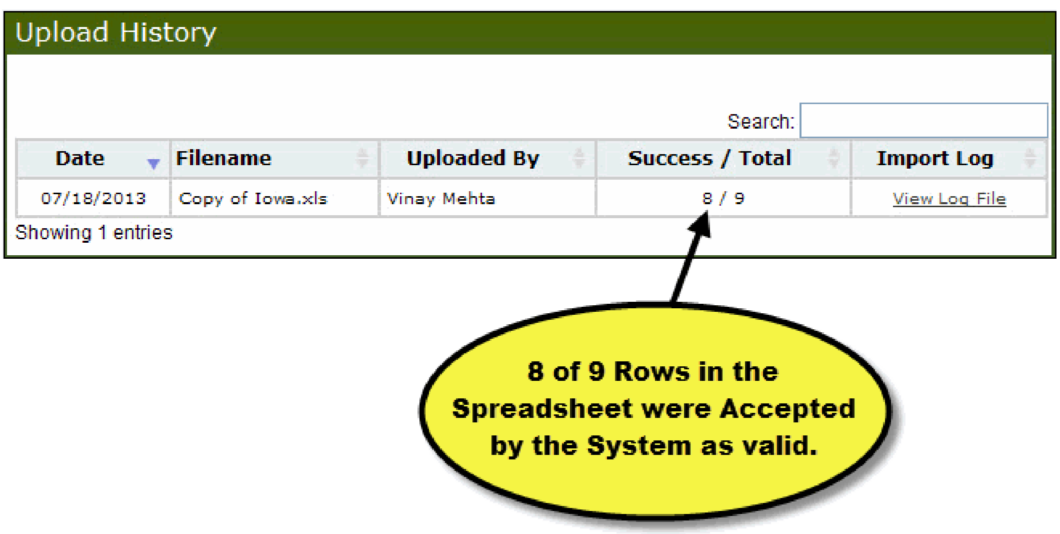
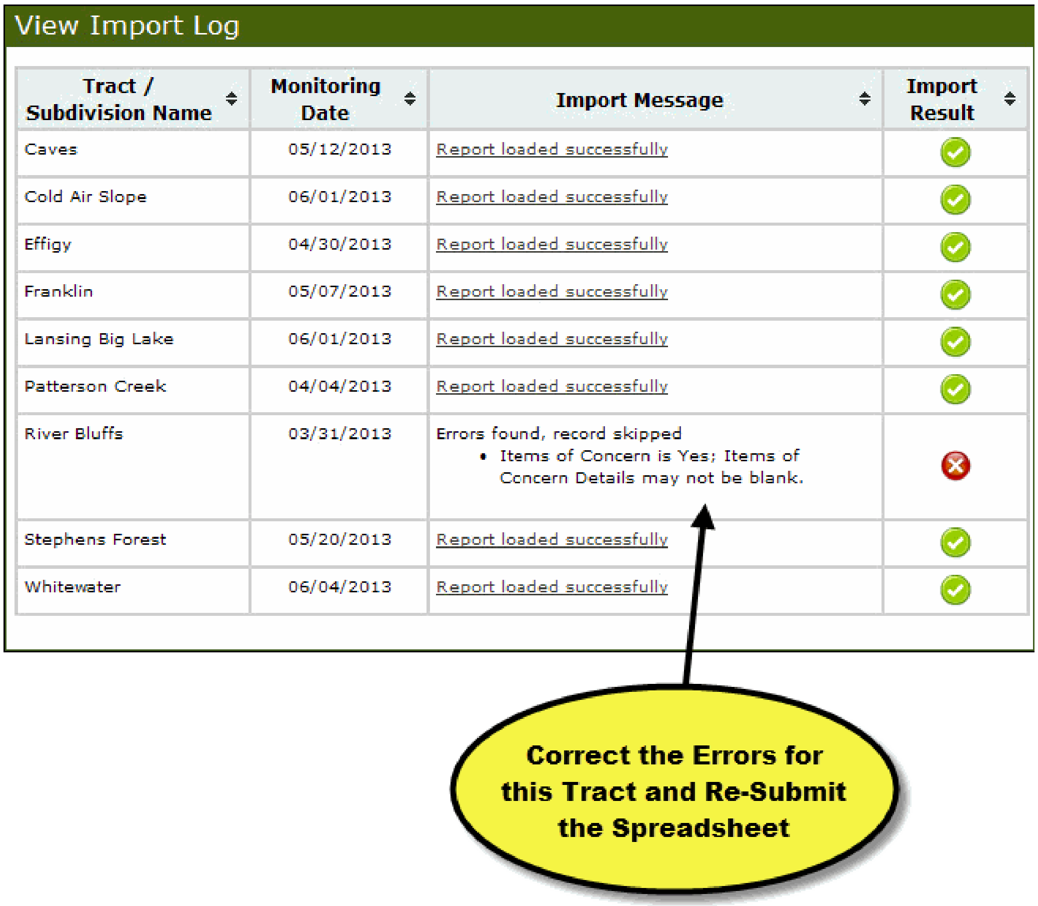


Figure 25 - The Monitoring Report Upload History Portlet

9.) Examine the contents of the Upload Report Log for the file you submitted. If there are errors present, correct the issues and re-submit to the system (for an example, see **Figure 26**). In this example, the system flagged the last row because an empty "Items of Concern Details" cell followed a positive value in the "Items of Concern" cell (a copy of the submitted spreadsheet is display in **Figure 27**).


View Import Log

Tract / Subdivision Name	Monitoring Date	Import Message	Import Result
Caves	05/12/2013	Report loaded successfully	
Cold Air Slope	06/01/2013	Report loaded successfully	
Effigy	04/30/2013	Report loaded successfully	
Franklin	05/07/2013	Report loaded successfully	
Lansing Big Lake	06/01/2013	Report loaded successfully	
Patterson Creek	04/04/2013	Report loaded successfully	
River Bluffs	03/31/2013	Errors found, record skipped • Items of Concern is Yes; Items of Concern Details may not be blank.	
Stephens Forest	05/20/2013	Report loaded successfully	
Whitewater	06/04/2013	Report loaded successfully	

Figure 26 - The Monitoring Report Import Log

Note: In this example (see Figure 27), the "River Bluffs" row contains a positive value in the "Items of Concern" cell, but has no text in the "Items of Concern Details" cell. The Import Log in Figure 26 provides the user with an error message to help diagnose the issue.

State Abbreviation	Tract/Subdivision Name	Monitor Date	Items of Concern? (Yes/No)	Items of Concern Details (required if Items of Concern=Yes)
IA	Caves	5/12/2013	No	
IA	Cold Air Slope	6/1/2013	No	
IA	Effigy	4/30/2013	Yes	Fire damage.
IA	Franklin	5/7/2013	No	
IA	Lansing Big Lake	6/1/2013	No	
IA	Patterson Creek	4/4/2013	Yes	Patches of tree wilt.
IA	River Bluffs	3/31/2013	Yes	
IA	Stephens Forest	5/20/2013	No	
IA	Whitewater	6/4/2013	No	

The Items of Concern cell is set to "Yes", but the Items of Concern Details cell is blank. Therefore, the record will be skipped.

Figure 27 - An Incomplete Monitoring Report Row

State-Level Duties

State Homepage

Below is a graphic of the State-Level homepage (see **Figure 28** - the Minnesota homepage). Review the elements of the graphic to familiarize yourself with the State homepage.

At various points during the Forest Legacy Program funding process, it is a State-level user's responsibility to create and submit information to Regional users, who in turn review and further submit the information to National-level users for archival.

Note: POST-ACTION STATUS refers to the status the Projects and/or Tracts will achieve after the user completes the task. For example, following the completion of all tasks described in the Rank and Submit Projects for Funding, the Projects and/or Tracts will achieve a status of "Submitted to Region".

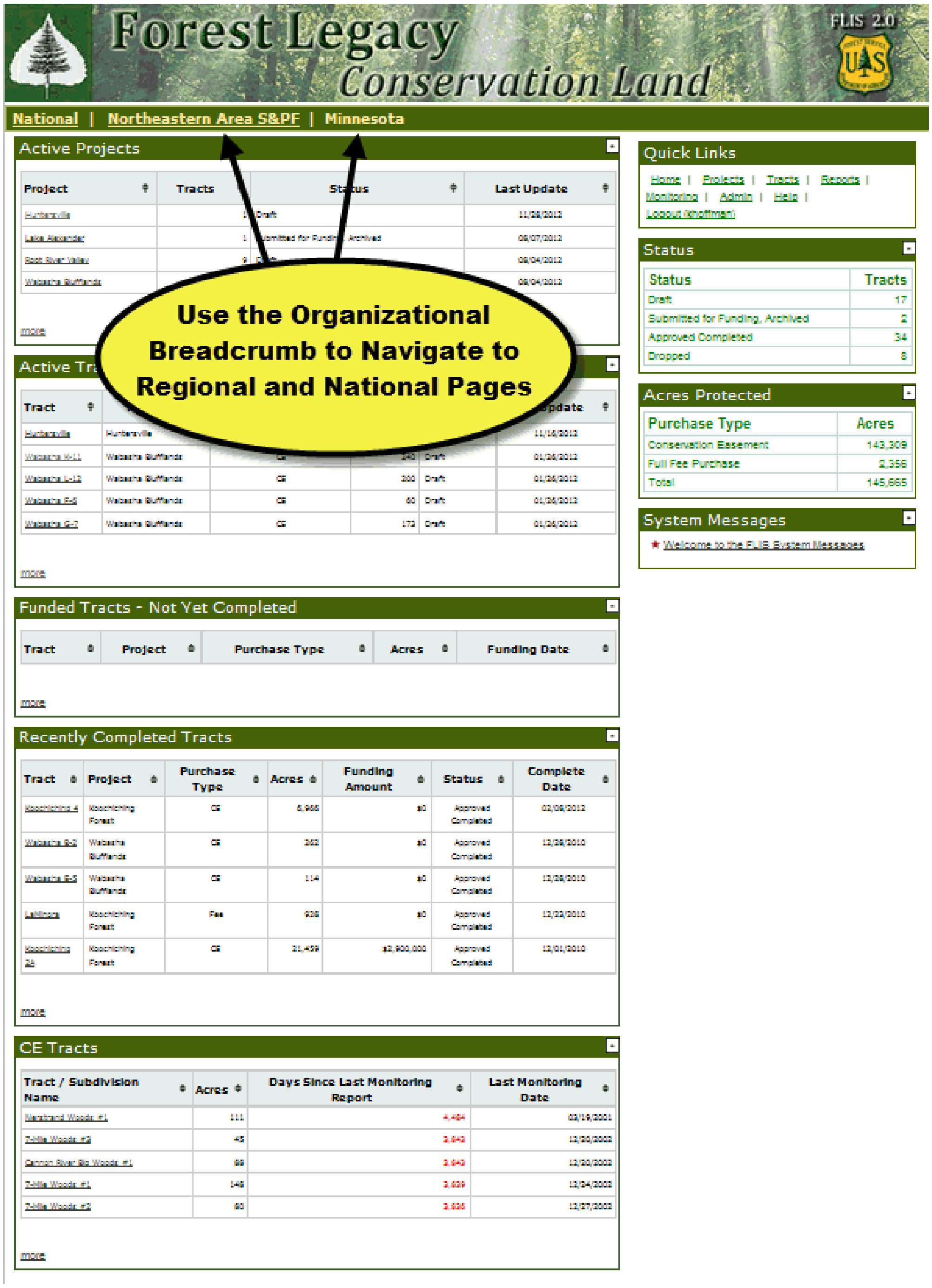


Figure 28 - The State Homepage

Rank and Submit Projects for Funding

POST-ACTION STATUS: Submitted to Region – This status indicates the Project and its associated Tracts have been submitted to the region for review and approval. This is the first step to initiate the funding process.

To receive Legacy funds, a Project (and its assigned Tracts) must advance through the FLIS application toward a status of "Approved, Completed". The first step towards receiving funds [after the initial information drafting stage] is to submit the Project/Tracts to Regional managers for funding consideration. To do this, a Project and its Tracts must have all required information entered into the system (see Verify Project for Submission); a user can then Rank Projects and submit them to Regional managers for funding consideration. During a funding cycle, each Legacy-participating state is allowed to submit three Projects for funding consideration; each Project is given a rank of 1, 2, or 3, depending on desirability. The FLIS application does not require unique ranks for Projects (meaning, a state could submit three Projects with the same rank).

Note: A Project will only appear on the Rank and Submit page if it has an assigned Tract with a target funding year that matches the current funding cycle (that is, the year past the current fiscal year – see Tract – Funding). All of the Projects that you intend to submit for funding consideration in a given fiscal year funding cycle must be ranked and submitted at one time; once ranks are submitted for a given fiscal year cycle, a user cannot re-submit rankings. If rankings must be redone, contact the NIC Help desk.

1.) From the State Homepage, click on the "Projects" link from the Quick Links menu.

2.) In the Project Menu portlet, select the "Rank and Submit Projects" link.

3.) One the Rank and Submit page, expand the text of one Project intended for submission (see **Figure 29**).

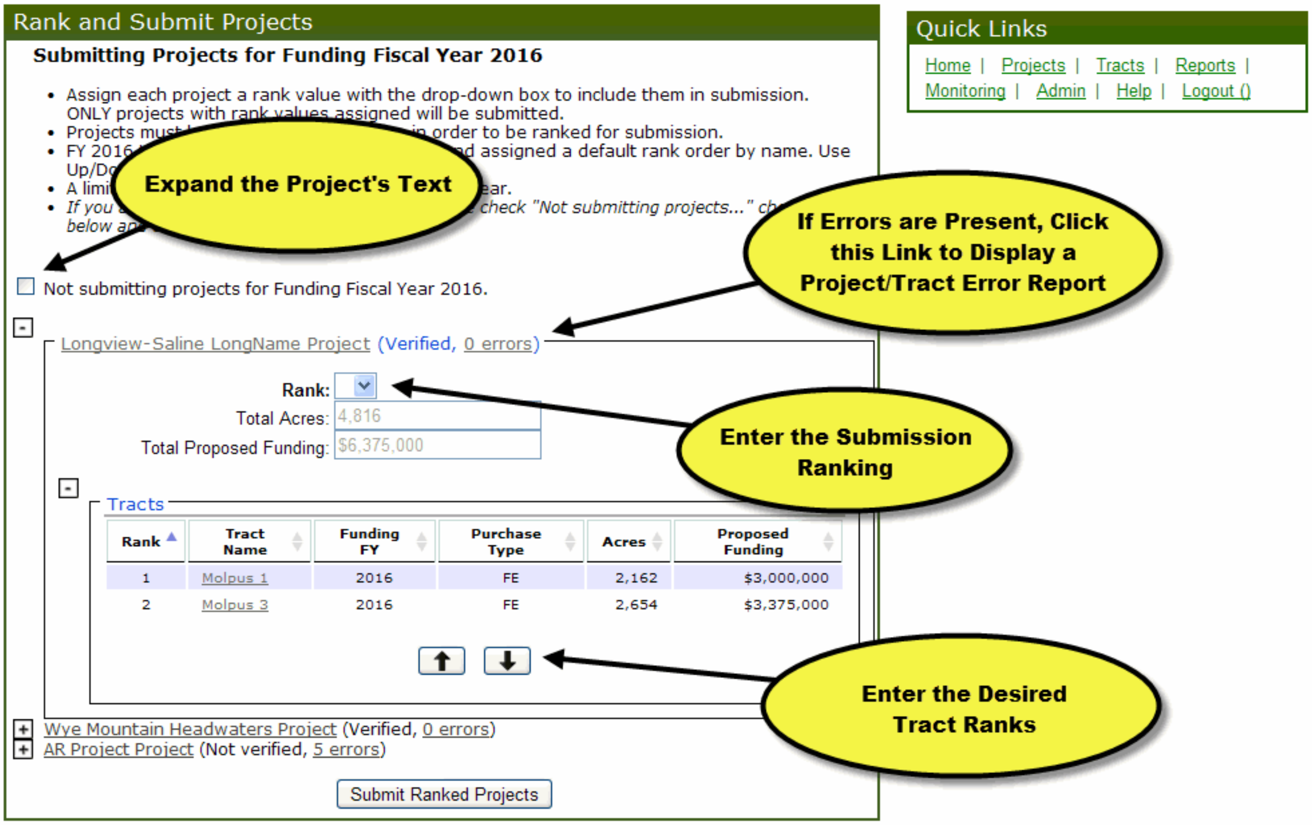


Figure 29 - The Rank and Submit Projects Page

4.) If Project intended for submission is displayed with errors (see **Figure 29**), correct these errors before proceeding.

5.) If the state does not intend to submit Projects/Tracts for funding consideration during the upcoming funding cycle, check the box next to “Not submitting projects for Funding Fiscal Year [Current Year]”.

6.) Enter the desired ranking in the Rank drop-down box.

7.) If necessary, expand the Tracts text; this will display a list of Tracts assigned to the Project with a set Funding Fiscal Year that matches the current funding cycle (see Tract – Funding). Using the Up and Down buttons, rank the Project’s Tracts as desired (see **Figure 29**).

8.) Click the “Submit Ranked Projects” button to submit the Projects to the Regional manager for funding consideration.

Close Tract

Note: A Tract can only be Closed if it has first reached a status of “Funded, Archived”.

POST-ACTION STATUS: Closed – This status indicates there has been a closing on the tract and the state program manager has entered all the required information into FLIS, and the tract is now pending review by a regional program manager. Once Closed, a tract is locked from editing.

When a Tract has advanced to the status of "Funded", user can identify a Tract as "Closed":

1.) Within the Edit Tract page, select the "Close Tract" option in the Tract Menu portlet (see **Figure 30**).

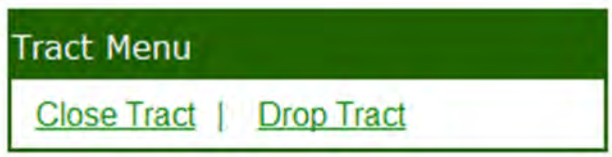


Figure 30 - The Close Tract and Drop Tract Options

2.) On the Close Completed Tract page, enter [at minimum] all required information.

Note: A User can click the "Save Tract" button to save the form's information and return at a later time to certify the information and close the tract.

3.) Check the "I certify…" box at the bottom of the page; this is a required certification of information. A tract cannot be closed without this certification.

4.) Click the "Close Tract" button.

   a. If any required fields have been omitted, the Tract will not be Closed, and a list of issues to be corrected will be provided at the top of the Verify Tract Information page.

Drop Tract

Note: A Tract can only be Dropped if it has reached a status of "Funded, Archived"; only State-level users with data-entry permissions may Drop Tracts.

POST-ACTION STATUS: Dropped – This status indicates the acquisition of this tract has failed and the identified Forest Legacy funds will not be used. A Dropped tract is locked from editing.

On occasion, the deal for tract acquisition cannot be made; this might be due to a variety of circumstances. In this event, the tract needs to be identified as "Dropped". When a Tract has advanced to the status of "Funded", user can then identify a Tract as "Dropped":

Within the Edit Tract page (see ***Note: Projects and tracts are visible to all users in the FLIS system with the following exceptions:***
-State/Organization Data-Entry users: "Draft" and "Submitted to Region" tracts are not visible outside of their respective State or Organization permissions.

-Read-Only users: "Draft" and "Submitted to Region" tracts are not visible to a Read-Only user (regardless of role).

1.) Adding New and Editing Existing Tracts), select the "Drop Tract" option in the Tract Menu portlet (see **Figure 30**).

2.) On the Drop Tract page, enter the appropriate information into the "Drop Date" and "Drop Reason" fields.

3.) Click the "Drop Tract" button.

Submit Accomplishment Report

Note: A State's accomplishments for funding tracts are tracked yearly by submitting Accomplishment Reports. These reports must be submitted by the due date set by the National Administrator (see Setting Accomplishment Report Due Dates). Once submitted, the accomplishments will only appear in the Regional/National Annual Accomplishments report (see Annual Accomplishments) after approval from a Regional-level user (see Approve Accomplishment Report).

1.) From the State homepage, click the "Reports" link in the Quick Links menu.

2.) Click the "View and Submit Accomplishments" link in the Reports Menu.

3.) Verify the information in the table is accurate and complete.

Note: Be sure that all intended tract activities for the Fiscal Year have occurred; otherwise these accomplishments will not be shown in the National Annual Accomplishments report.

If there are no accomplishments for the fiscal year, the State must still submit an accomplishment report by certifying that no accomplishments occurred.

4.) If the information in the table is complete and accurate, check the "I certify…" box and click the "Submit Report" button (see **Figure 31**).

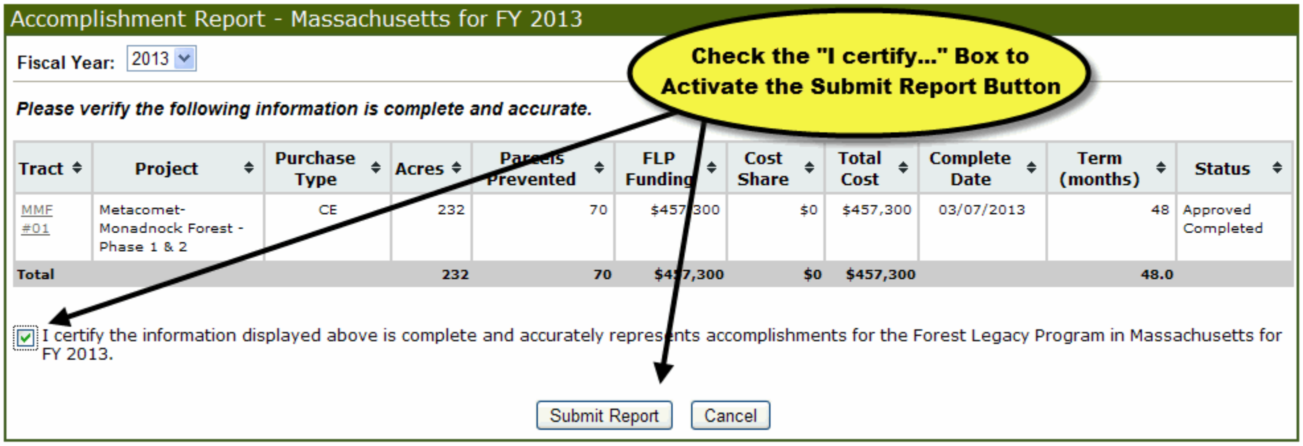


Figure 31 - Submitting an Accomplishment Report

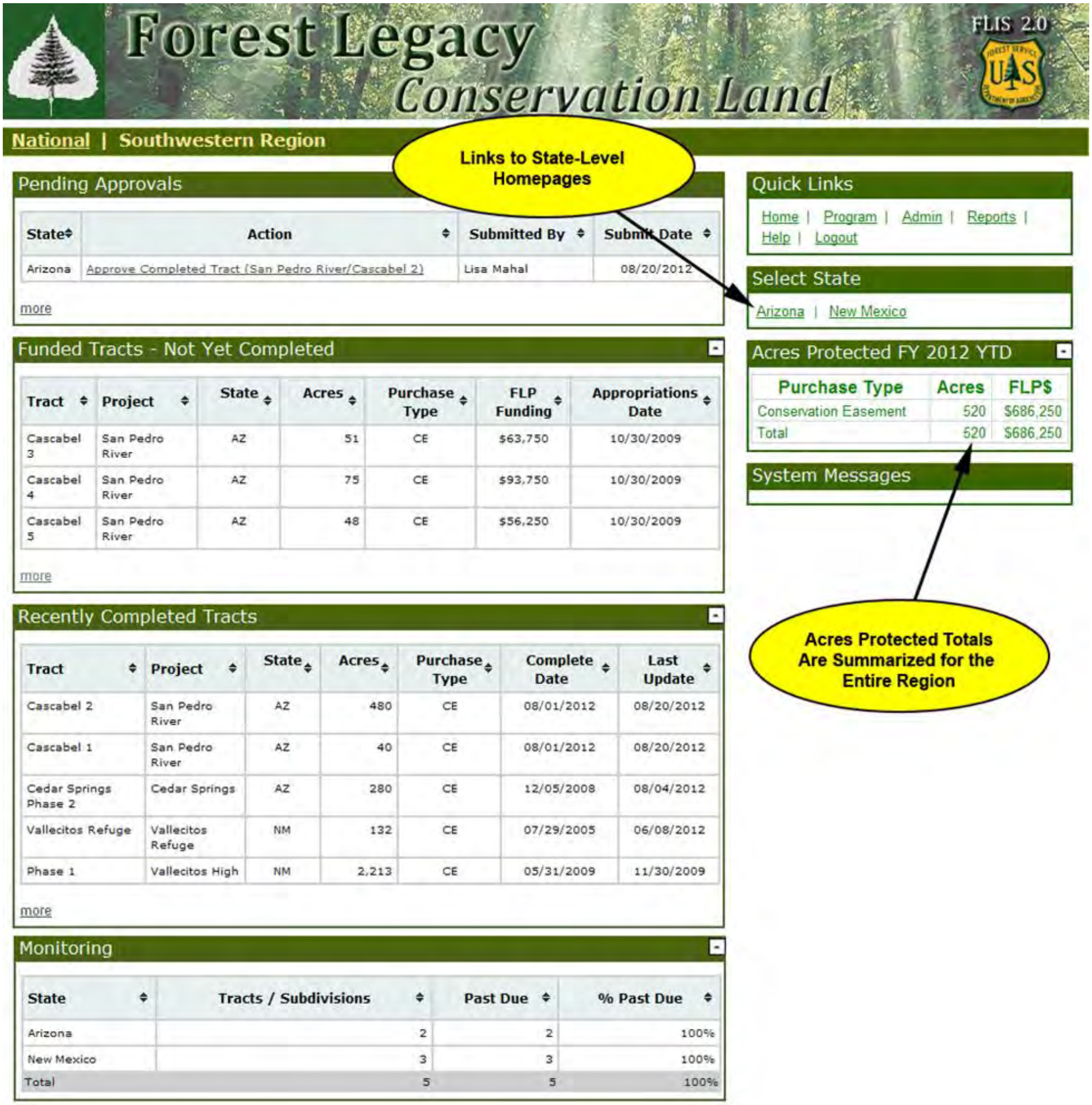
Regional-Level Duties

Regional Homepage

Below is a graphic of the Regional-Level homepage (see **Figure 32** - the Southwestern Region's homepage). Review the elements of the graphic to familiarize yourself with the Regional homepage.

At various points during the Forest Legacy Program funding process, it is a Regional user's responsibility to verify data and submit information to National users for archival. Also, when a tract is deemed "funded", it is the responsibility of the Regional user to grant final approval before funds can be exchanged.

Note: POST-ACTION STATUS refers to the status the Projects and/or Tracts will achieve after the user completes the task.



State	Action	Submitted By	Submit Date
Arizona	Approve Completed Tract (San Pedro River/Cascabel 2)	Lisa Mahal	08/20/2012

Purchase Type	Acres	FLP$
Conservation Easement	520	$686,250
Total	520	$686,250

Tract	Project	State	Acres	Purchase Type	FLP Funding	Appropriations Date
Cascabel 3	San Pedro River	AZ	51	CE	$63,750	10/30/2009
Cascabel 4	San Pedro River	AZ	75	CE	$93,750	10/30/2009
Cascabel 5	San Pedro River	AZ	48	CE	$56,250	10/30/2009

Tract	Project	State	Acres	Purchase Type	Complete Date	Last Update
Cascabel 2	San Pedro River	AZ	480	CE	08/01/2012	08/20/2012
Cascabel 1	San Pedro River	AZ	40	CE	08/01/2012	08/20/2012
Cedar Springs Phase 2	Cedar Springs	AZ	280	CE	12/05/2008	08/04/2012
Vallecitos Refuge	Vallecitos Refuge	NM	132	CE	07/29/2005	06/08/2012
Phase 1	Vallecitos High	NM	2,213	CE	05/31/2009	11/30/2009

State	Tracts / Subdivisions	Past Due	% Past Due
Arizona	2	2	100%
New Mexico	3	3	100%
Total	5	5	100%

Figure 32 - The Regional-Level Homepage

Submit Projects for Funding Consideration

Note: All states within the Region must have ranked and submitted their Projects for funding consideration (or mark their states as "Not Submitting Projects" for the intended fiscal funding cycle) before Projects can be submitted for funding by the Regional user.

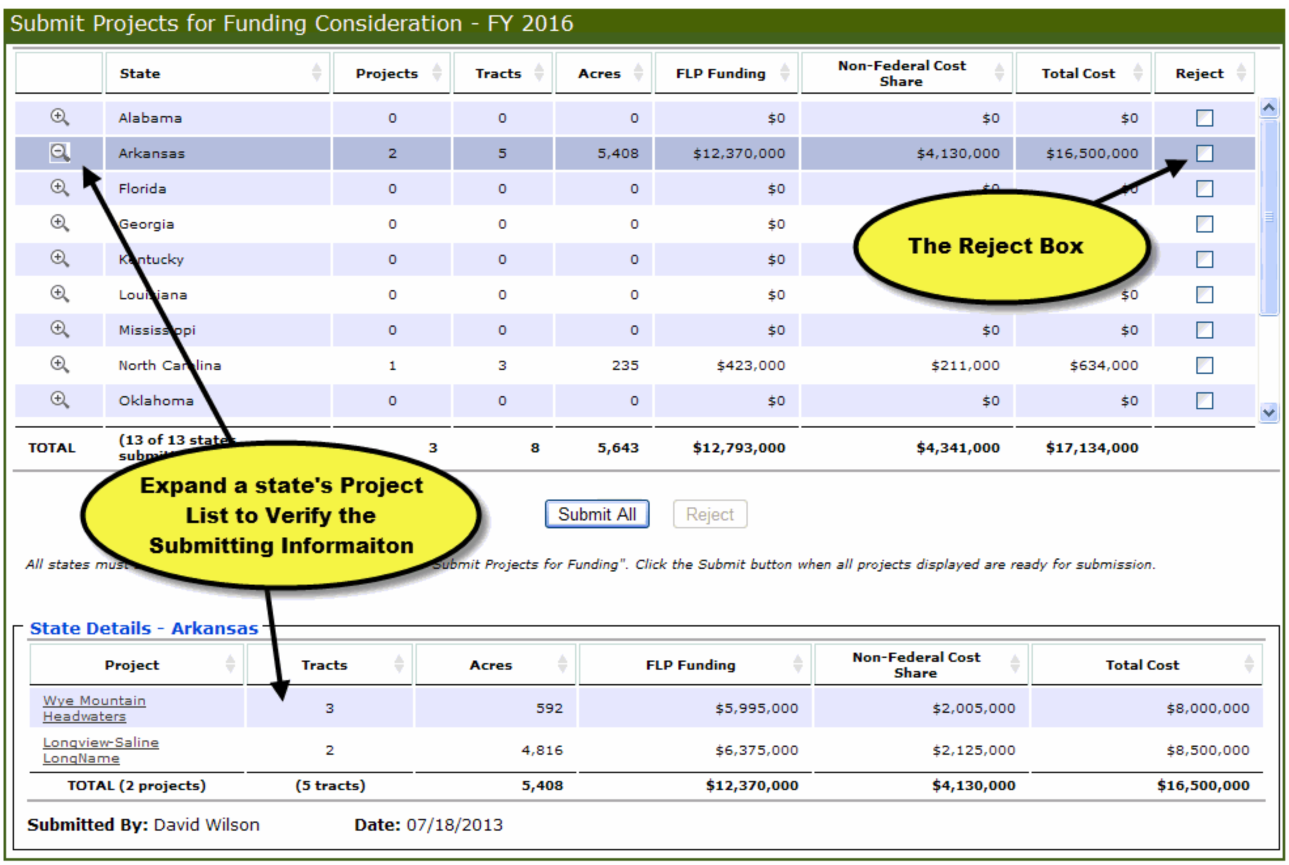
POST-ACTION STATUS: Submitted for Funding – This status indicates the Project and its associated Tracts have been submitted by the region for national funding consideration. At this stage, any project with a tract that is "Submitted for Funding" will be locked from editing.

1.) From the Regional Homepage, click on the "Program" link from the Quick Links menu.

2.) On the Program Menu page, click the "Submit Projects for Funding Consideration" link.

3.) Examine the list of Projects in the table/form to verify the correct projects are being advanced to the National level (see **Figure 33**).

   a. If there are errors in the data, check the Reject box in the state's row, and click the "Reject" button. The state user will then need to re-submit the state's projects for funding consideration.


Submit Projects for Funding Consideration - FY 2016

	State	Projects	Tracts	Acres	FLP Funding	Non-Federal Cost Share	Total Cost	Reject
	Alabama	0	0	0	$0	$0	$0	☐
	Arkansas	2	5	5,408	$12,370,000	$4,130,000	$16,500,000	☐
	Florida	0	0	0	$0	[illegible]	[illegible]	☐
	Georgia	0	0	0	$0	[illegible]	[illegible]	☐
	Kentucky	0	0	0	$0	[illegible]	[illegible]	☐
	Louisiana	0	0	0	$0	[illegible]	$0	☐
	Mississippi	0	0	0	$0	$0	$0	☐
	North Carolina	1	3	235	$423,000	$211,000	$634,000	☐
	Oklahoma	0	0	0	$0	$0	$0	☐
TOTAL	(13 of 13 state[illegible] subm[illegible]	3	8	5,643	$12,793,000	$4,341,000	$17,134,000	

Submit All Reject

All states must [illegible] Submit Projects for Funding". Click the Submit button when all projects displayed are ready for submission.

State Details - Arkansas

Project	Tracts	Acres	FLP Funding	Non-Federal Cost Share	Total Cost
Wye Mountain Headwaters	3	592	$5,995,000	$2,005,000	$8,000,000
Longview-Saline LongName	2	4,816	$6,375,000	$2,125,000	$8,500,000
TOTAL (2 projects)	(5 tracts)	5,408	$12,370,000	$4,130,000	$16,500,000

Submitted By: David Wilson **Date:** 07/18/2013

Figure 33 - The Submit Projects for Funding Consideration Page

4.) Click the "Submit Projects for Funding" button at the bottom of the page. This will forward the Projects to the National user for archival.

Submit President's Request Tracts

POST-ACTION STATUS: President's Request – This status indicates the tract is in a project that has been ranked by the Forest Legacy Program National Panel and is being proposed to Congress for funding based on the proposed President's budget (regional program managers are responsible for submitting a list of "President's Request" tracts annually). At this stage, projects containing tracts with a status of "President's Request" are locked from editing.

1.) From the Regional Homepage, click on the "Program" link from the Quick Links menu.

2.) On the Program Menu page, click the "Submit President's Request Tracts" link.

3.) On the Submit President's Request Tracts page, in the Project Rank boxes, enter the appropriate President's Request ranking for the Project. Entering a rank in the box will populate a list of Tracts below; check the Tracts that are intended to be included with the President's Request (see **Figure 34).**

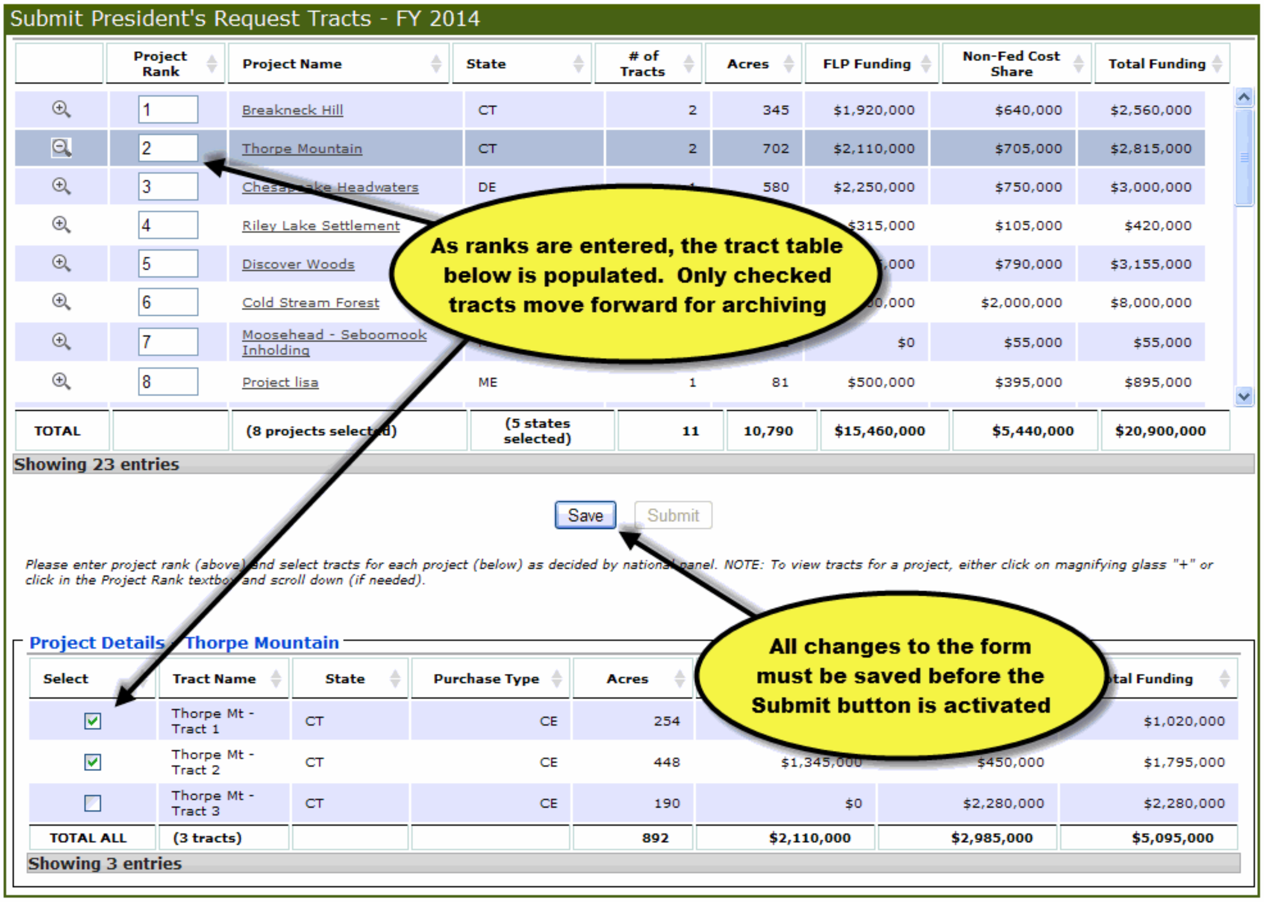


Figure 34 - The Submit President's Request Tracts Page

Note: Any changes to the form are required to be saved before the page's information can be submitted to the National level.

4.) Click the "Save" button.

5.) Click the "Submit" button.

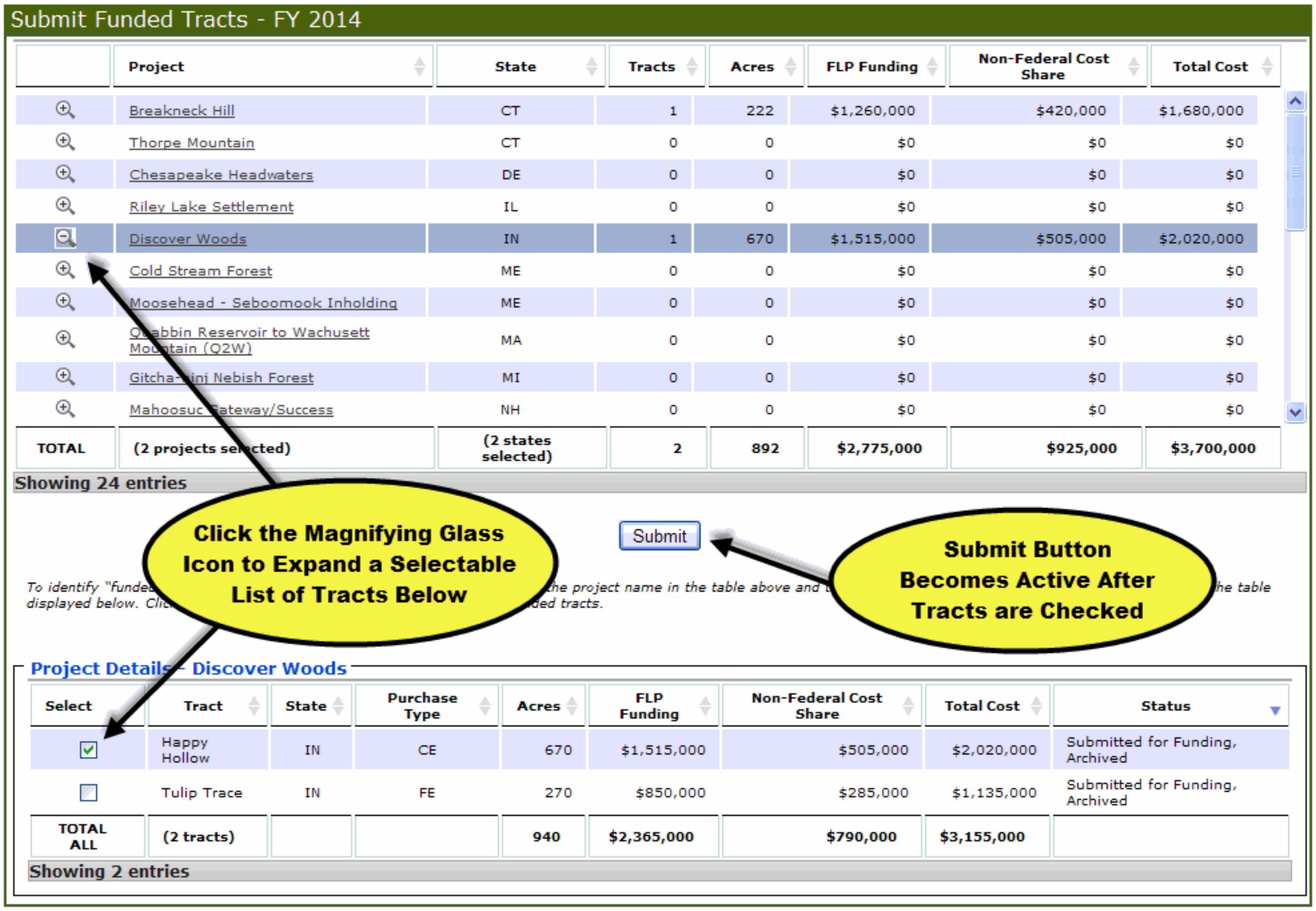
Submit Funded Tracts

POST-ACTION STATUS: Funded – This status indicates the tract has been funded. Regional program managers are responsible for annually submitting a list of funded tracts. Projects containing tracts with a status of "Funded" are locked from editing.

1.) From the Regional Homepage, click on the "Program" link from the Quick Links menu.

2.) On the Program Menu page, click the "Submit Funded Tracts" link.

3.) On the Submit Funded Tracts page, in the Submit Funded Tracts portlet, click a magnifying glass icon next to a Project containing Tracts that are intended for submission (see **Figure 35**).



	Project	State	Tracts	Acres	FLP Funding	Non-Federal Cost Share	Total Cost
	Breakneck Hill	CT	1	222	$1,260,000	$420,000	$1,680,000
	Thorpe Mountain	CT	0	0	$0	$0	$0
	Chesapeake Headwaters	DE	0	0	$0	$0	$0
	Riley Lake Settlement	IL	0	0	$0	$0	$0
	Discover Woods	IN	1	670	$1,515,000	$505,000	$2,020,000
	Cold Stream Forest	ME	0	0	$0	$0	$0
	Moosehead - Seboomook Inholding	ME	0	0	$0	$0	$0
	Quabbin Reservoir to Wachusett Mountain (Q2W)	MA	0	0	$0	$0	$0
	Gitcha-Minj Nebish Forest	MI	0	0	$0	$0	$0
	Mahoosuc Gateway/Success	NH	0	0	$0	$0	$0
TOTAL	(2 projects selected)	(2 states selected)	2	892	$2,775,000	$925,000	$3,700,000

Showing 24 entries

Select	Tract	State	Purchase Type	Acres	FLP Funding	Non-Federal Cost Share	Total Cost	Status
☑	Happy Hollow	IN	CE	670	$1,515,000	$505,000	$2,020,000	Submitted for Funding, Archived
☐	Tulip Trace	IN	FE	270	$850,000	$285,000	$1,135,000	Submitted for Funding, Archived
TOTAL ALL	(2 tracts)			940	$2,365,000	$790,000	$3,155,000	

Showing 2 entries

Figure 35 - The Submit Funded Tracts Page

4.) Repeat Step 3 for all Tracts that are intended for submission.

5.) Click the “Submit” button.

Approve Completed Tracts

Note: A Tract can also be “Rejected” by the Regional user. A rejection is warranted if the Regional user sees information on the Approve Completed Tract page that is inaccurate. If the Regional user “rejects” the tract, the tract’s status reverts to “Funded, Archived” (see Tract Status Descriptions). The tract can be re-submitted for Closure by the state user at another time.

POST-ACTION STATUS: Approved, Completed – This status indicates the closed tract has been reviewed and approved by the regional program manager. At this point, the tract is permanently locked from editing.

1.) From the Regional Homepage, click on the “Program” link from the Quick Links menu.

2.) On the Program Menu page, click the “Pending Approvals” link.

3.) From the “View All Pending Approvals” portlet, click the “Approve Completed Tract [Tract Name]” link of the tract you wish to Close.

4.) Review the details of the Approve Completed Tract page (see **Figure 36**); if necessary, change any incorrect information in the form.

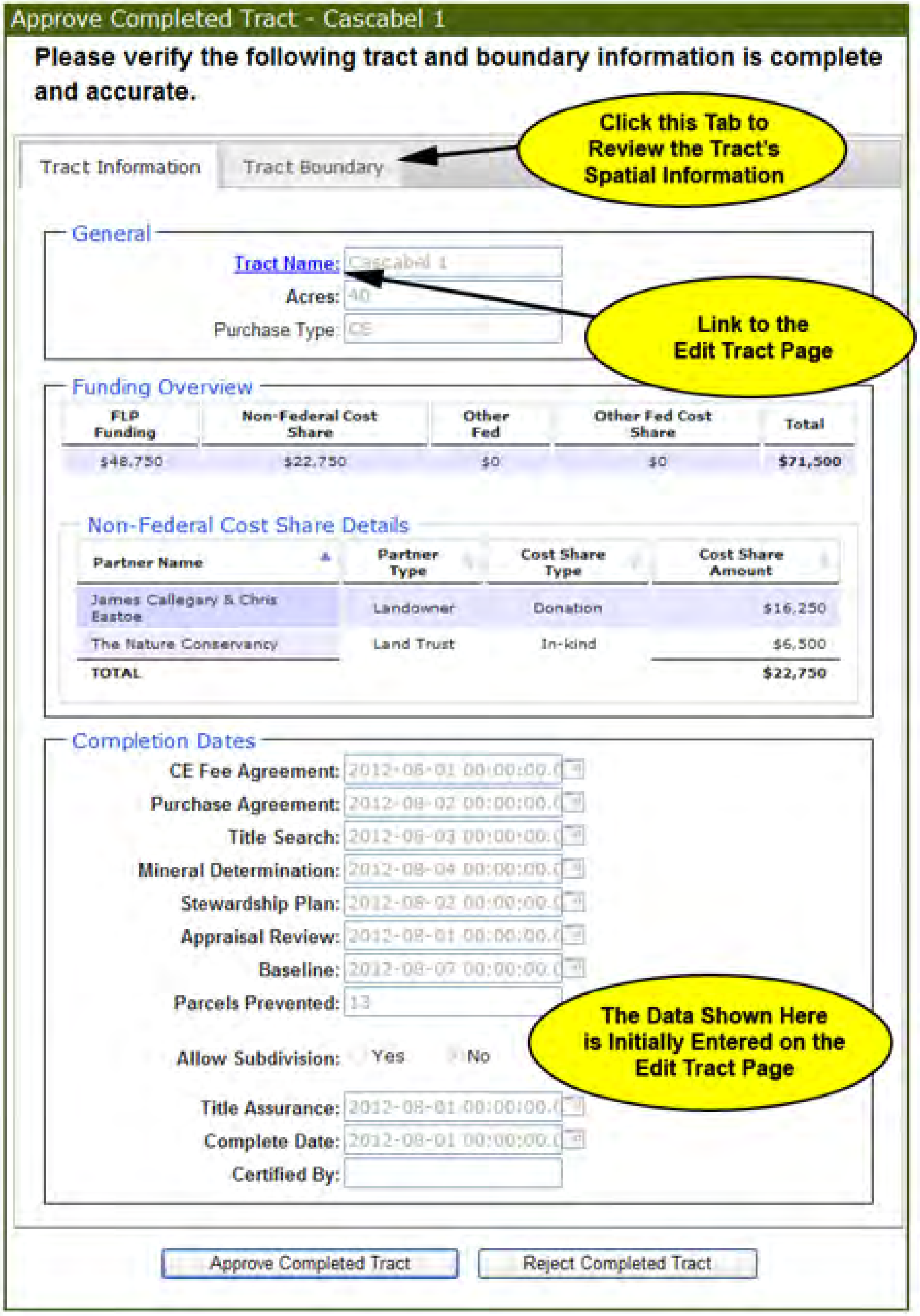


Figure 36 - The Approve Completed Tract Page

5.) Click the "Approve Completed Tract" button to approve the tract's final information.

   a. Alternatively, if any of the data is inaccurate, click the "Reject Completed Tract" button; this will revert the tract's status back to "Funded, Archived" (this status permits editing of data).

Approve Accomplishment Report

Note: State funding accomplishments will not be reflected in the National/ Regional Annual Accomplishments report unless they are approved by a Regional user.

1.) In the Pending Approvals portlet on the Regional homepage, click a “Approve FY [Fiscal Year] Accomplishment Report” link for a given state (these links will appear after a State has submitted their Accomplishment Report – see Submit Accomplishment Report).

2.) Examine the contents of the table; if they are accurate and complete, check the “I have reviewed the information…” box (see **Figure 37**).

   a. If errors are present, or if the information is incomplete, click the “Reject Report” button at the bottom of the portlet. Once rejected, a State will need to resubmit their report to have their accomplishments reflected in the Regional and National Annual Accomplishments report.

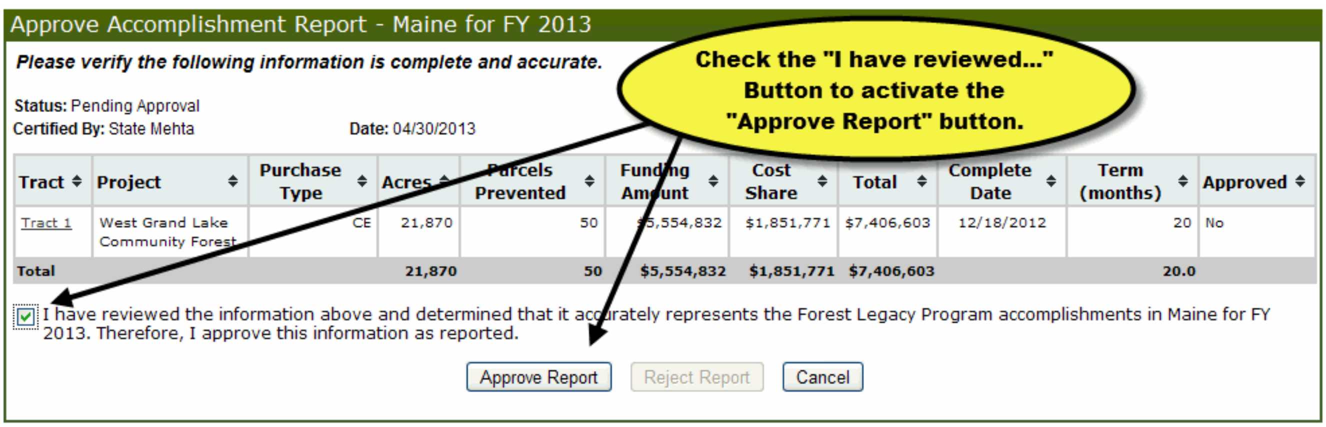


Figure 37 - Approving an Accomplishment Report

3.) Click the “Approve Report” button at the bottom of the portlet.

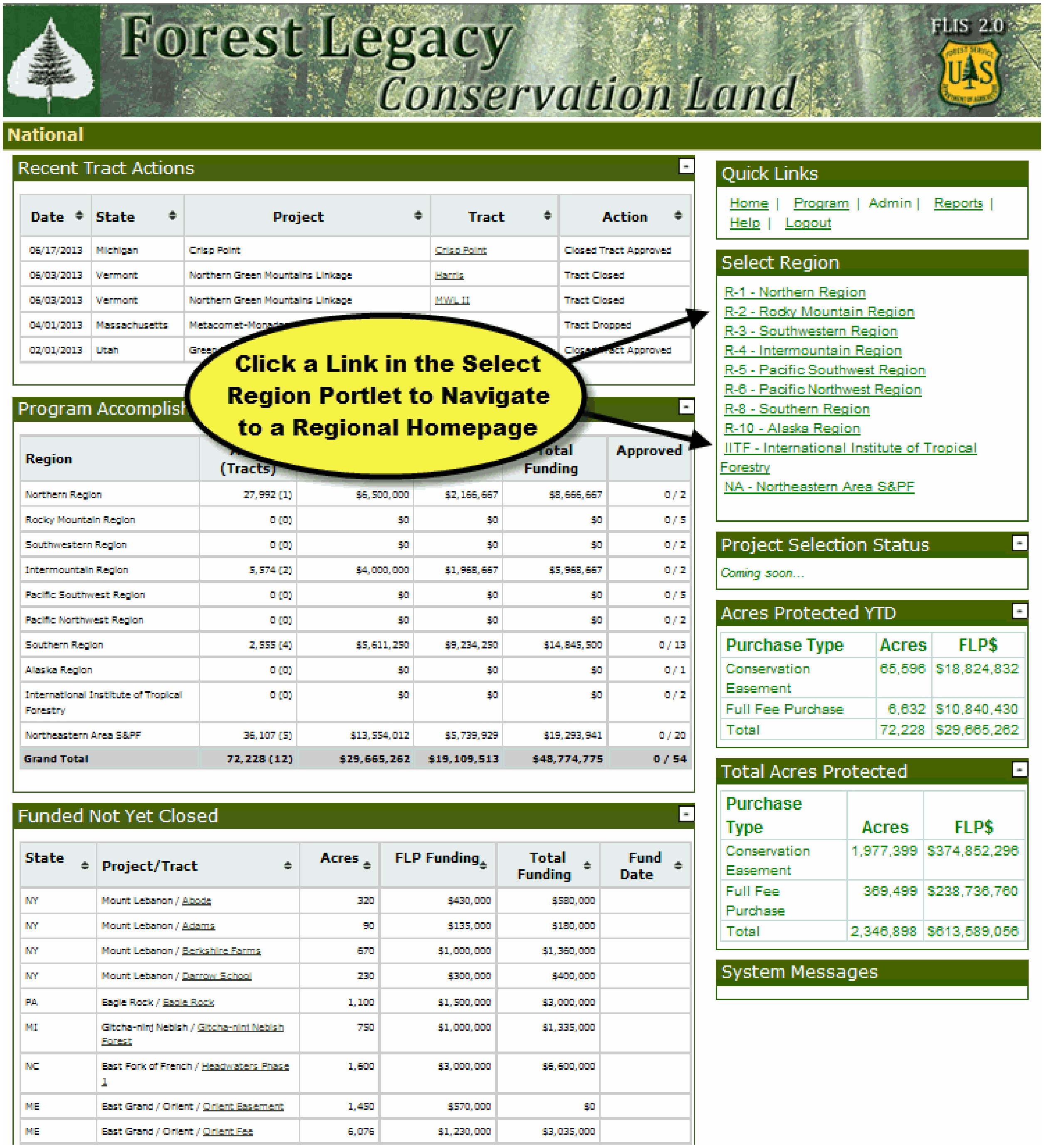
National-Level Duties

National Homepage

Below is a graphic of the National-Level homepage (see **Figure 38**). Review the elements of the graphic to familiarize yourself with the National homepage.

At various points during the Forest Legacy Program funding process, it is a National user's responsibility to verify data and archive information submitted by Regional users.

Note: POST-ACTION STATUS refers to the status the Projects and/or Tracts will achieve after the user completes the task. For example, following the completion of all tasks described in this section, the Projects and/or Tracts will achieve a status of "Submitted for Funding, Archived".



Forest Legacy Conservation Land FLIS 2.0

National

Recent Tract Actions

Date	State	Project	Tract	Action
06/17/2013	Michigan	Crisp Point	Crisp Point	Closed Tract Approved
06/03/2013	Vermont	Northern Green Mountains Linkage	Harris	Tract Closed
06/03/2013	Vermont	Northern Green Mountains Linkage	MWL II	Tract Closed
04/01/2013	Massachusetts	Metacomet-Monad		Tract Dropped
02/01/2013	Utah	Gree		Clos ct Approved

Click a Link in the Select Region Portlet to Navigate to a Regional Homepage

Program Accomplish

Region	(Tracts)			Total Funding	Approved
Northern Region	27,992 (1)	$6,500,000	$2,166,667	$8,666,667	0 / 2
Rocky Mountain Region	0 (0)	$0	$0	$0	0 / 5
Southwestern Region	0 (0)	$0	$0	$0	0 / 2
Intermountain Region	5,574 (2)	$4,000,000	$1,968,667	$5,968,667	0 / 2
Pacific Southwest Region	0 (0)	$0	$0	$0	0 / 5
Pacific Northwest Region	0 (0)	$0	$0	$0	0 / 2
Southern Region	2,555 (4)	$5,611,250	$9,234,250	$14,845,500	0 / 13
Alaska Region	0 (0)	$0	$0	$0	0 / 1
International Institute of Tropical Forestry	0 (0)	$0	$0	$0	0 / 2
Northeastern Area S&PF	36,107 (5)	$13,554,012	$5,739,929	$19,293,941	0 / 20
Grand Total	72,228 (12)	$29,665,262	$19,109,513	$48,774,775	0 / 54

Funded Not Yet Closed

State	Project/Tract	Acres	FLP Funding	Total Funding	Fund Date
NY	Mount Lebanon / Abode	320	$430,000	$580,000	
NY	Mount Lebanon / Adams	90	$135,000	$180,000	
NY	Mount Lebanon / Berkshire Farms	670	$1,000,000	$1,360,000	
NY	Mount Lebanon / Darrow School	230	$300,000	$400,000	
PA	Eagle Rock / Eagle Rock	1,100	$1,500,000	$3,000,000	
MI	Gitcha-nini Nebish / Gitcha-nini Nebish Forest	750	$1,000,000	$1,335,000	
NC	East Fork of French / Headwaters Phase 1	1,600	$3,000,000	$6,600,000	
ME	East Grand / Orient / Orient Easement	1,450	$570,000	$0	
ME	East Grand / Orient / Orient Fee	6,076	$1,230,000	$3,035,000	

Quick Links

Home | Program | Admin | Reports | Help | Logout

Select Region

R-1 - Northern Region
R-2 - Rocky Mountain Region
R-3 - Southwestern Region
R-4 - Intermountain Region
R-5 - Pacific Southwest Region
R-6 - Pacific Northwest Region
R-8 - Southern Region
R-10 - Alaska Region
IITF - International Institute of Tropical Forestry
NA - Northeastern Area S&PF

Project Selection Status

Coming soon...

Acres Protected YTD

Purchase Type	Acres	FLP$
Conservation Easement	65,596	$18,824,832
Full Fee Purchase	6,632	$10,840,430
Total	72,228	$29,665,262

Total Acres Protected

Purchase Type	Acres	FLP$
Conservation Easement	1,977,399	$374,852,296
Full Fee Purchase	369,499	$238,736,760
Total	2,346,898	$613,589,056

System Messages

Figure 38 - The National Homepage

Archive Projects Submitted for Funding Consideration

Note: All Regions must have submitted to the National user before Projects can be archived.

POST-ACTION STATUS: Submitted for Funding, Archived – This status indicates that a national program manager has reviewed and archived all of the projects that were submitted for funding consideration in a given funding fiscal year. Once archived, the projects become unlocked and may once again be edited.

1.) From the National Homepage, click on the “Program” link from the Quick Links menu.

2.) On the Program Menu page, click the “Archive Project for Funding Consideration” link.

3.) On the Archive Projects for Funding Consideration page, verify the contents of the table are accurate.

    a. If needed, the user may click the magnifying glass graphic to see detailed Project information displayed below the table.

    b. If a Region’s information is incorrect, check the Region’s Reject box. Then, click the “Reject” button near the bottom of the screen. Following this action, the Regional user will need to correct any errors, and re-submit to the National level.

4.) If all Regions have submitted their information to the National level, and if the contents of the table are accurate, click the “Archive All” button (see **Figure 39**).

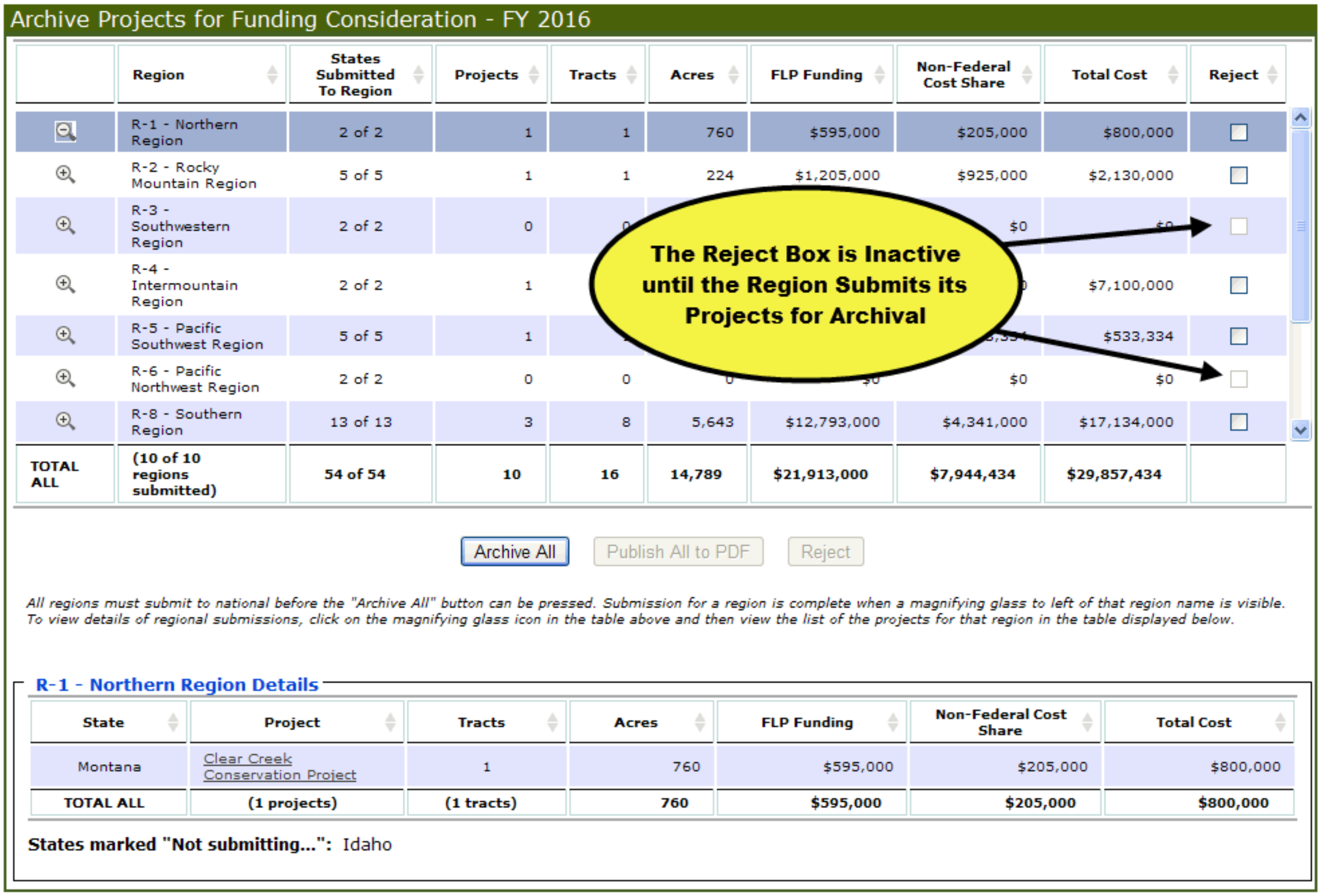


Figure 39 - The Archive Projects Submitted for Funding Consideration Page

Archive President's Request Tracts

Note: The archive function for President's Request Tracts does not require that all Regions have submitted their Projects/Tracts to the National level.

POST-ACTION STATUS: President's Request, Archived – This status indicates that the "President's Request" tracts submitted regionally have been reviewed and archived by the national program manager. Once archived, Tracts are unlocked and may be edited as needed.

1.) From the National Homepage, click on the "Program" link from the Quick Links menu.

2.) On the Program Menu page, click the "Archive President's Request Tracts" link.

3.) On the Archive President's Request Tracts page, verify the contents of the table are accurate.

  a. If needed, the user may click the magnifying glass graphic to see detailed Tract information displayed below the table.

b. If a Region's information is incorrect, check the Region's Reject box. Then, click the "Save" button near the bottom of the screen. Following this action, the Regional user should correct any errors and re-submit to the National level.

Note: Any changes to the form are required to be saved before the page's information can be archived (see Figure 40).

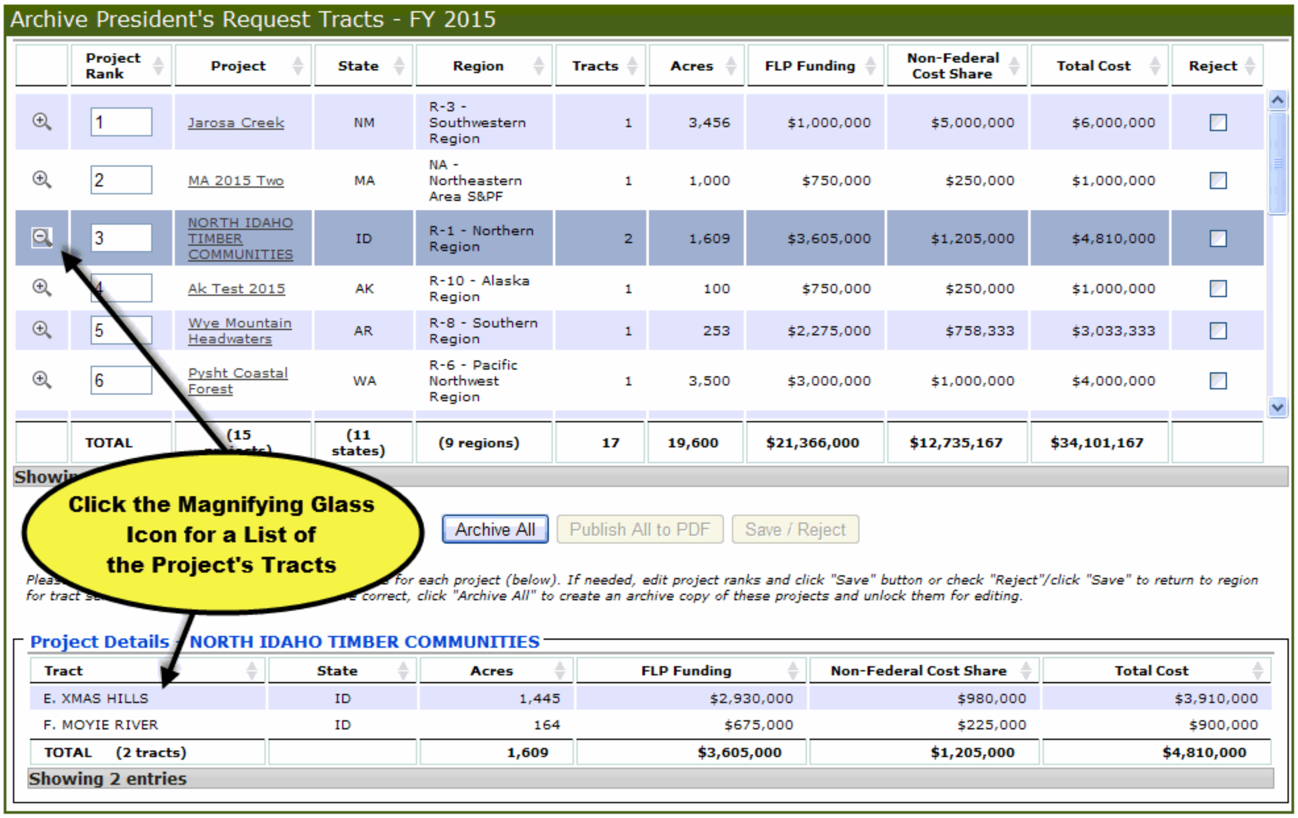


Figure 40 - The Archive President's Request Tracts Page

4.) Review the ranks displayed in the Rank column. Verify these ranks match the known ranks for the list of President's Request Tracts published by the National Forest Legacy panel.

5.) Click the "Archive All" button to produce President's Request Project Brief archives for the Projects and Tracts shown on the page (see **Figure 40**).

Archive Funded Tracts

Note: The archive function for Funded Tracts does not require that all Regions have submitted their Projects/Tracts to the National level.

POST-ACTION STATUS: Funded, Archived – This status indicates the “Funded” tracts submitted by the regions have been reviewed and archived by the national program manager. Once archived, the tracts become unlocked and may be edited as needed.

Note: Once Tracts achieve a status of “Funded-Archived”, they can no longer be deleted. At this point, these Tracts can only be “Closed” or “Dropped” (see Close Tract or Drop Tract).

1.) From the National Homepage, click on the “Program” link from the Quick Links menu.

2.) On the Program Menu page, click the “Archive Funded Tracts” link.

3.) On the Archive Funded Tracts page, verify the contents of the table are accurate.

  a. If needed, the user may click the magnifying glass graphic next to the Project to see detailed Tract information displayed below the table (see **Figure 41**).

  b. If a Project’s information is incorrect, check the Reject box at the right end of the Project row. Then, click the “Reject” button near the bottom of the screen. Following this action, the Regional user must correct any errors and re-submit to the National level.

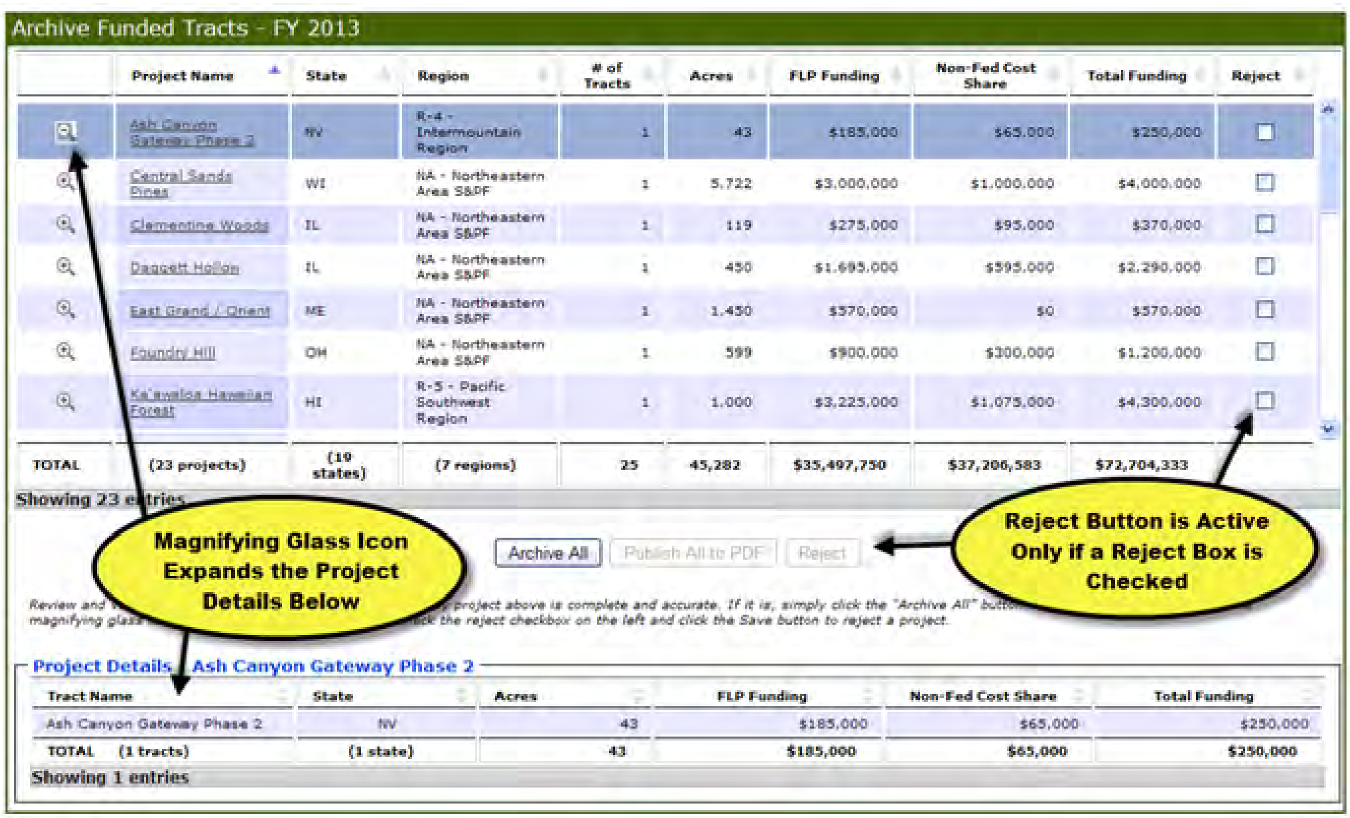


Figure 41 - The Archive Funded Tracts Page

4.) Click the “Archive All” button to initiate the Archive process.

5.) A Funding Date pop-up window will appear after clicking the "Archive All" button (see **Figure 42**); then, enter the Funding Date (the date the Federal Appropriations were signed into law). Use the calendar/date selector next to the Funding Date field to browse dates.

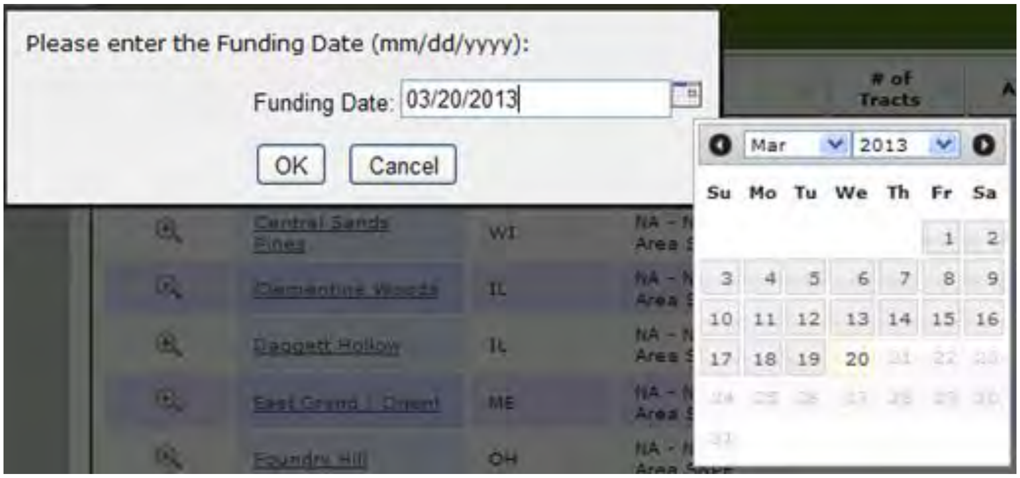


Figure 42 - Entering the Funding Date

6.) Click the "OK" button; this will create an archive of Brief for the Projects shown in the list.

Reports

Project Details

The Project Details report provides a detailed report of each Forest Legacy Project, as well as detailed information about each tract associated with a project.

To access the Project Details report:

1.) From the State Homepage, select the “Reports” link from the Quick Links menu.

2.) Alternatively, users can access the Project Brief (Current) document through the Project Menu portlet on the Edit Project page.

3.) From the Reports Menu page, select the “Project Details” link.

4.) Select the link for your project from the “Project Details - Select Report” table.

5.) An html report of the Project Details report will be generated based on current information stored in FLIS.

Project Briefs (Current)

The Project Brief report provides an overview of each Forest Legacy Project, as well as a summary of information about each tract associated with a project.

To access the Project Brief:

1.) From the State Homepage, select the “Reports” link from the Quick Links menu.

    a. Alternatively, users can access the Project Brief (Current) document through the Project Menu portlet on the Edit Project page.

2.) From the Reports Menu page, select the “Project Brief (Current)” link.

3.) Select the link for your project from the Project Brief/Select Project table.

4.) A PDF report of the Project Brief will be generated based on current information stored in FLIS.

Project Briefs from Archive

The Project Briefs from Archive represents a capture of a Project's information at certain status points. As a Project advances in status (see Tract Status Descriptions), information is captured at these points: Submitted for Funding, President's Request, and Funded. The archived Project Briefs may then be used to compare current and past Project information.

To access Project Briefs from Archive:

1.) From the State, Regional, or National Homepage, select the "Reports" link from the Quick Links menu.

2.) From the Reports Menu page, select the "Project Briefs from Archive" link.

3.) At the top of the Project Briefs from Archive page, select from the drop-down menus the appropriate options to narrow your search; this will create a list of selectable briefs in the portlet.

4.) Select the desired Project Brief link; a new window will open containing the Brief.

Forest Legacy Program Proposed (President's Request) Projects

The Forest Legacy Program Proposed (President's Request) Projects is a list of projects in the President's Request for a given funding fiscal year.

To access Forest Legacy Program Proposed (President's Request) Projects:

1.) From the Regional or National Homepage, select the "Reports" link from the Quick Links menu.

2.) From the Reports Menu page, select the "Forest Legacy Program Proposed (President's Request) Projects" link.

3.) At the top of the Forest Legacy Program Proposed Projects portlet, select the desired year from the drop-down menu; this will create a list of selectable Project Brief links (these are the Projects included in the given year's President's Request list).

4.) Select the desired Project Brief link; a new window will open containing the Brief.

Funded Tracts by Fiscal Year

A state by state summary report of all the tracts that were funded in a given year by the Forest Legacy Program. To access the Funded Tracts by Fiscal Year report:

1.) From the Regional or National Homepage, select the "Reports" link from the Quick Links menu.

2.) From the Reports Menu page, select the "Funded Tracts by Fiscal Year" link.

3.) Use the Funding Fiscal Year drop-down menu at the top of the page to select a list of tracts that were funded in a given year.

Annual Accomplishments

A state by state summary report of all tract accomplishments in a given year by the Forest Legacy Program; a State's accomplishments will only appear once they have been submitted and approved by State-level and Regional-level users (see Submit Accomplishment Report and Approve Accomplishment Report). To access the Annual Accomplishments report:

1.) From the National Homepage, select the "Reports" link from the Quick Links menu.

2.) From the Reports Menu page, select the "Annual Accomplishments" link.

3.) Use the Fiscal Year drop-down menu at the top of the page to select a list of tract accomplishments from a given year.

Land Protected to Date

A state by state summary report of all the land protected to date by the Forest Legacy Program. To access the Land Protected to Date Report:

1.) From the Regional or National Homepage, select the "Reports" link from the Quick Links menu.

2.) From the Reports Menu page, select the "Land Protected to Date" link.

Download Tract Details Spreadsheet

A Regional or National spreadsheet containing all current Tract data in the system; to download a spreadsheet of the current FLIS Tract data:

1.) From the Regional or National Homepage, select the "Reports" link from the Quick Links menu.

2.) From the Reports Menu page, select the "Download Tract Details Spreadsheet" link; save the file to a local drive.

Administration

Setting Accomplishment Report Due Dates

Note: Only National Administrator users may set Accomplishment Report submission due dates. State-Level users must submit an Accomplishment Report each year; these reports provide Statewide summaries of tract-level funding.

1.) From the National Homepage, click on the "Admin" link from the Quick Links menu.

2.) Click the "Reply Due Dates" link in the Administration menu.

3.) To edit an existing entry, or to create a Reply Due Date for a new year:

   a. To edit an existing entry, click the text you wish to change and make any necessary edits. Both the Fiscal Year and Reply Due columns can be edited.

   b. To add a new entry, click the "Insert New Row" button. Then, enter the applicable Fiscal Year, and its associated Reply Due date (see **Figure 43**).

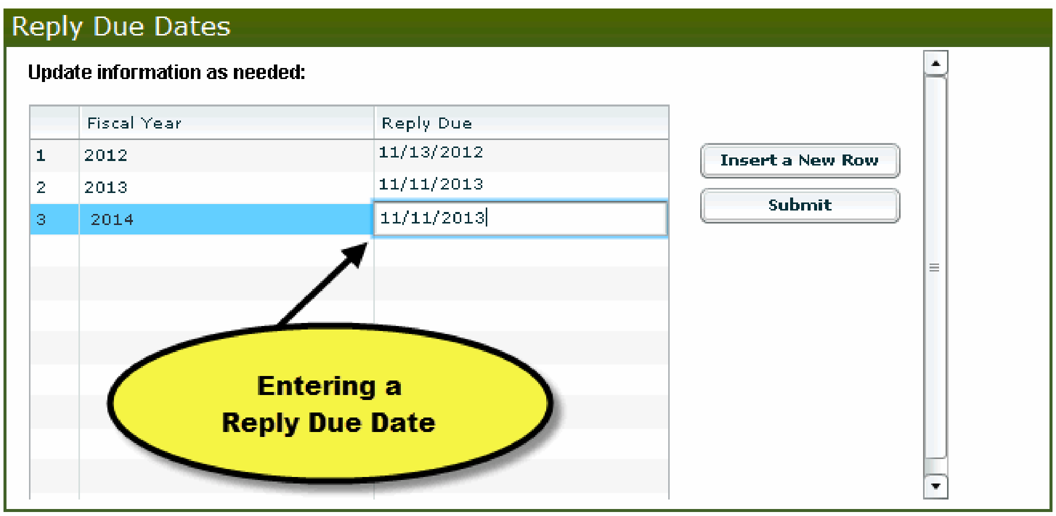


Figure 43 - Entering a Reply Due Date

4.) Click the "Submit" button to save your changes.

Add / Edit / Delete System Messages

1.) Select the "Admin" link from the Quick Links menu.

2.) Select the “System Messages” link from the Administration Menu.

3.) To create a new message, click the “Add New Message” link. To edit an existing message, click the message’s link in the Title column.

4.) Enter the appropriate information into the form. For National users, select the desired options for the “Display to Regions” and “Display to States” options (see **Figure 44** - these options allow National users to target which users will see the message displayed on their homepage; Regional users do not have this option). Messages generated by Regional-level users will display only to users within that user’s region.

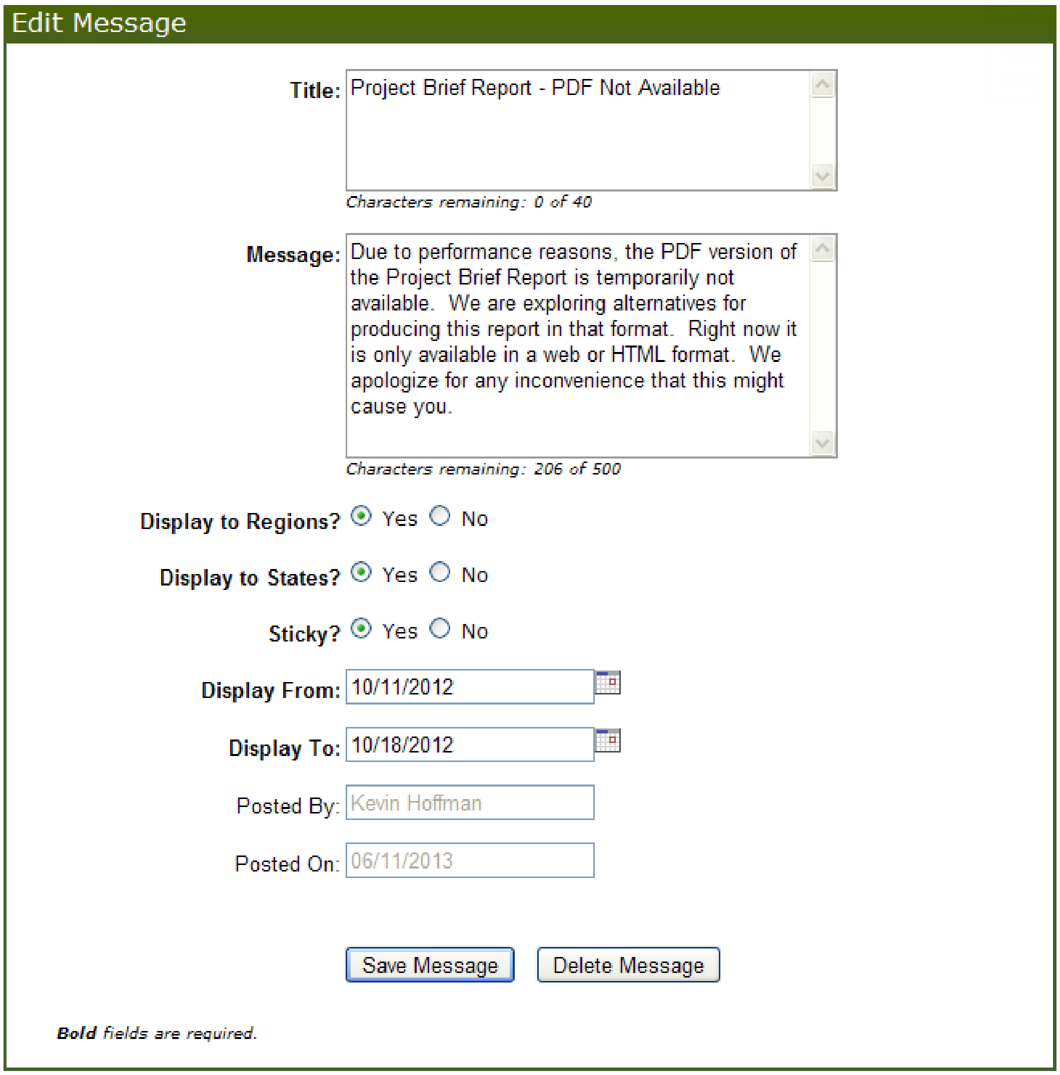


Figure 44 - The Edit System Message Page

5.) Click the “Save Message” button at the bottom of the page.

a. To delete a message, click the "Delete Message" button at the bottom of the page. The Delete Message button will be inactive if the user has made a change to the message's text or settings.

System Notice Subscriptions

All FLIS users can subscribe to system notices; these notices are summarized accounts of system activities, such as a list of all newly created Projects, or a list of Tracts that have been deleted. System notices are provided to users via email. To create a System Notice subscription:

1.) Select the "Admin" link from the Quick Links menu.

2.) Select the "System Notice Subscriptions" link from the Administration Menu.

3.) On the System Notice Subscriptions page, select the events to which you would like to subscribe (see **Figure 45**); click the "All Events" box to select all events within a given category. When you receive the System Notice email, you will receive information for all of these events that occurred within your Region/State(s).

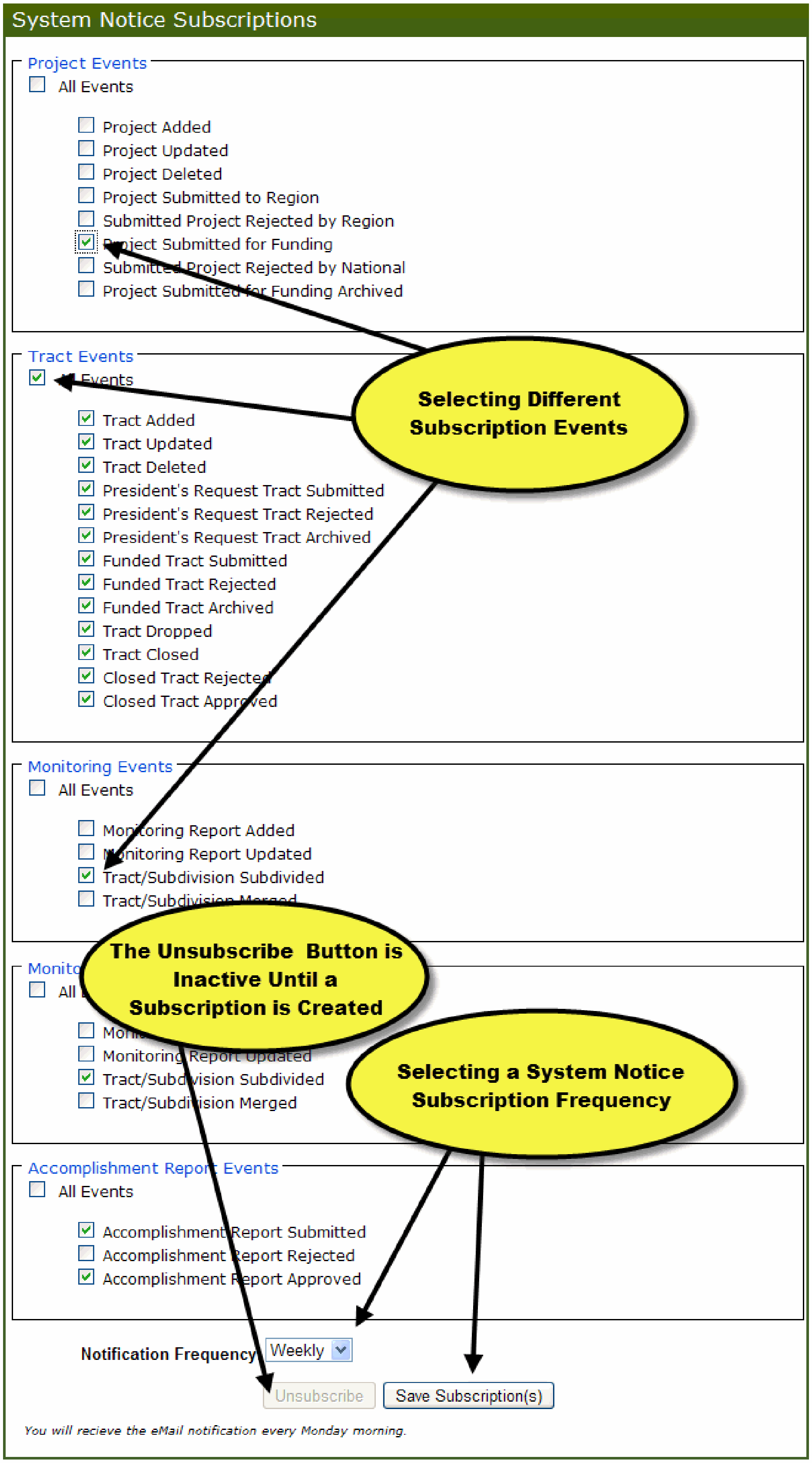

System Notice Subscriptions
Project Events
All Events
Project Added
Project Updated
Project Deleted
Project Submitted to Region
Submitted Project Rejected by Region
Project Submitted for Funding
Submitted Project Rejected by National
Project Submitted for Funding Archived
Tract Events
Tract Added
Tract Updated
Tract Deleted
President's Request Tract Submitted
President's Request Tract Rejected
President's Request Tract Archived
Funded Tract Submitted
Funded Tract Rejected
Funded Tract Archived
Tract Dropped
Tract Closed
Closed Tract Rejected
Closed Tract Approved
Monitoring Events
All Events
Monitoring Report Added
Monitoring Report Updated
Tract/Subdivision Subdivided
Tract/Subdivision Merged
Accomplishment Report Events
All Events
Accomplishment Report Submitted
Accomplishment Report Rejected
Accomplishment Report Approved
Notification Frequency
Weekly
Unsubscribe
Save Subscription(s)
You will recieve the eMail notification every Monday morning.
Selecting Different Subscription Events
The Unsubscribe Button is Inactive Until a Subscription is Created
Selecting a System Notice Subscription Frequency

Figure 45 - The System Notices Subscription Page

4.) Select a frequency for receiving the System Notices email; the frequency will include all events that occurred within the selected interval.

Note: The "Save Subscription" button becomes active once a user selects a Noticication Frequency.

5.) Click the "Save Subscriptions" button; the System Notices emails will be sent the email address listed in your NIC Portal User Profile.

   a. Alternatively, to unsubscribe to system messages, click the "Unsubscribe" button.

Edit Forest Legacy Program Contact Information

To access Forest Legacy Program Contact information for your state/region:

1.) Select the "Admin" link from the Quick Links menu.

2.) Select the "Forest Legacy Program Contacts" link from the Administration Menu.

3.) To edit information for a specific contact, click the link on their name; this will open the Edit Forest Legacy Program Contacts page.

4.) After all changes have been made, click the "Save Contact" button to commit the new information to the FLIS application.

Users

To view a list of all active user accounts for your state/region and their last login information:

1.) Select the "Admin" link from the Quick Links menu.

2.) Select the "Users" link from the Administration Menu.

3.) You may sort the table of users by clicking on one of the table headings.

Glossary

Acres

The acreage of the tract that is to be protected by the Forest Legacy Program; rounded to the nearest acre. For planned acquisitions this may be estimated. At time of completion the acreage figure must match the recorded deed acreage of the land protected by Forest Legacy Program.

Allow Subdivision

This indicates whether a Conservation Easement tract will allow subdivisions. If so, these subdivisions will be allowed in the CE Monitoring Reports. This value is set in the Edit Tract form.

Appraisal (Date)

Date of the report from a qualified appraiser that determines the appraisal value of the interest being acquired (MM/DD/YYYY). This date is only reported for Cost Share tracts and it must be entered before a completion date is accepted. Additionally this date must be before the completion date.

Appraisal Review (Date)

Date of the report from a qualified review appraiser that determines that the appraisal of the value of the interest being acquired meets the requirements of the FOREST LEGACY PROGRAM (MM/DD/YYYY). This date must be entered before a completion date is accepted and it must be before the completion date. Appraisal reviews are not required for Cost Share tracts and therefore this information is not reported for these tracts.

Approved Competed

Indicates the closed tract has been reviewed and approved by the program manager. At this point, the tract is permanently locked from editing.

Baseline (Date)

Date that both the landowner and conservation easement holder have accepted the baseline documentation report as depicting the condition of the property at the time of the conveyance. This date must be entered before a completion date is accepted if acquisition is a conservation easement. This date must be equal to or before the completion date.

Closed

Indicates there has been a closing on the tract and that a state program manager has entered all the required information into FLIS, and the tract is now pending review by a regional program manager.

Complete Date

Date the Federal interest in the fee acquisition or conservation easement is finalized. That latter of either the closing date of the real estate transaction, or the date all Forest Legacy Program standards were met and the FLP program manager determines the funds can be reimbursed to the grantee if the property interest was previously acquired.

Conservation Easement

A Forest Legacy Tract where partial interest in the land is conveyed by deed from a landowner to a FLP qualified Conservation Easement holder with the intent of restricting present and future landowners of the property into perpetuity to achieve conservation objectives.

Cost Share

A “Tract” represents a single acquisition (one deed - one tract). However, Cost Share Amount match is measured at the project level; states/users can have a tract (i.e. acquisition) that is entirely funded by the Forest Legacy Program, or a tract that is entirely cost share (or anywhere in between). However, at the time of project submission, Cost Share rules are enforced at the Project level.

Users may not take excess cost share from one project and use it to match FLP funds in another project (this is Forest Legacy Program policy; the FLIS application does not support it).

If Cost Share is entered both as a separate tract as well as identified it in the Cost Share table on the funding tab on Forest Legacy tract, the value will be double-counted; to see a summary of Project-level Cost Share funding, see Project – Funding.

The Forest Legacy Program funding amount should equal the grant amount (or, if funding multiple grants, they should sum to the grant amount). Users are allowed to use FLP grant funds to cover some administrative costs of tract acquisition. In this case, select “Yes” in the “Cost Share Only” field on the Tract – Funding page; Forest Legacy Program funds can be used to fund administrative costs for the acquisition of Cost Share tracts in the circumstance where no FLP funds were actually used to purchase the tract itself.

Cost Share Amount

Dollar amount of Non Federal cost share used to fund the acquisition. For project proposals round to the nearest $5,000, when completed enter actual value of cost share used. Round to the nearest whole dollar amount.

Cost Share Only

Explicitly identifies a tract (yes or no) as a cost share tract (see Cost Share Tract).

Cost Share Partner Name

Name of the agency, organization, group or other providing the cost share funds.

Cost Share Tract

A tract that does not use FLP Funding for the actual acquisition of a Conservation Easement or Full Fee Purchase, and is used to fulfill the FLP requirements for nonfederal cost share.

Cost Share Type

The type of cost share being provided, cash, donation (if landowner is donating value) or In-kind services.

Draft

Initial step in the workflow. It indicates the tract has not yet been ranked or submitted to region for funding consideration.

Drop Date

Date determined that the tract has failed and that Forest Legacy Program funds will not be used on a tract.

Dropped

Indicates the acquisition of this tract has failed and the identified Forest Legacy funds will not be used. Dropped tracts are also locked from editing.

Drop Reason

Brief explanation of why the project was dropped.

Easement Conditions (Date)

Date the landowner and the eligible easement holder have general agreement on conservation easement conditions.

Easement or Fee Conditions (Date)

Date the landowner and the eligible easement or FEE holder have general agreement on conservation easement or fee acquisition conditions.

Federal Designation

Designation whether lands within Forest Legacy Tracts share territory with other Federal boundaries (e.g. national forest, national park, or national wildlife refuge). These lands are eligible for the Forest Legacy Program, provided the responsible Federal agency concurs with the FLP State acquisition.

Fee Conditions (Date)

Date the landowner and the eligible FEE holder have general agreement on fee acquisition conditions.

Funded

Indicates the tract has been funded. Regional program managers are responsible for submitting a list of funded tracts annually. Again, projects containing tracts with this status are locked from editing.

Funded, Archived

Indicates the "Funded" tracts submitted by the regions have been reviewed and archived by the national program manager. Again, at this stage, projects are unlocked and may be updated as needed. Once funded, tracts may no longer be deleted; they may only be "Closed" or "Dropped".

Funding Date

Date the Federal Appropriations Bill is signed into law; if signed into law before the fiscal year the date is October 1.

FLP Funding

Funding derived from the U.S. Forest Service Forest Legacy Program used for Tract acquisition.

Full Fee Purchase

A Forest Legacy Tract where all the rights, title, and interests are acquired from a landowner to a FLP qualified holder.

Funding Fiscal Year

Proposed or actual (for funded contributions) Federal fiscal year for the Forest Legacy Program Contribution.

Funding Notes

Any notes the State wished to add regarding funding information, this information will not be displayed on the project brief.

Grant Number

A U.S. Forest Service-generated number used to uniquely identify the grant to the State, Island or Territory funding the planned acquisition.

Importance

Brief statements that focus on the attributes of the property and the environmental, social, and economic public benefits gained from the protection and management of the property and its resources. Statements reflect the ecological assets and the economic and social values conserved by the project and its level of significance. Support any claims with the source.

Interest Owner

Represents the category of the final owner of the interests to be purchased. The interest owner is the buyer in the real estate transaction. Categories are as follows: Federal, State, Other or TBD (To Be Determined).

Items of Concern

Items/issues of concern identified when monitoring Conservation Easement tracts.

Last Update

The last date the Project, Tract, or Report's information was updated in the FLIS system.

Location

The geographic name of a town, city, county, parish, borough, etc. in which the Project is located. Where possible use a name that is in common use and approved by an authoritative body such as the U.S. Board on Geographic Names (http://geonames.usgs.gov/).

Mineral Determinations (Date)

Date that it is determined mineral rights have not been severed from the surface rights, or the date that the mineral rights have been acquired by the State and retired, or if the mineral rights have been severed the date the determination has been made that the exercise of those rights for mineral extraction is so remote as to be negligible based on factual information. At proposal this is optional this date must be entered before a completion date is accepted. Additionally, this date must be before the completion date.

Monitoring Date

Date the Monitoring Report was completed or filed (on paper).

National Project Rank (President's Request)

These rankings are assigned to Projects by the National Forest Legacy panel. They reflect the funding preferences of the executive branch and the Forest Legacy Panel for select Projects (and Tracts).

Other Federal Agency Name

Name of the source of other Federal funding (if any) used to complete the FLP acquisition.

Other Federal Amount

Dollar amount of other Federal funds used in the acquisition. For project proposals, round to the nearest $5,000. When completed enter actual value of cost share used. Round to the nearest whole dollar amount.

Other Federal Cost Share Amount

Dollar amount of Federal cost share that is directed to the other Federal funds being used to fund the acquisition. For project proposals, round to the nearest $5,000. When completed enter actual value of cost share used. Round to the nearest whole dollar amount.

Other Federal Program Name

The name of the Federal program which provides funding.

Parcels Prevented

Describes the number of parcels the tract could have been divided into given current local zoning, ordinances, and other regulations if the tract was not completed. The appraisal, existing zoning regulations, and other documentable sources can be used to determine the number of potential parcels for the property at its highest and best use.

Photo Caption

Caption to be displayed with the photo on the project brief; describes what the image is portraying.

Photo Credit

Name of photographer or organization providing the photo.

Post Action Status

The status the Projects and/or Tracts will achieve after the user completes the task.

Pre-Appraisal/Market Analysis (Date)

Date documenting support for the cost estimate, such as completed market analysis or preliminary appraisal. At proposal this is optional, however this date must be entered before a completion date is accepted. Additionally, this date must be before the Completion Date.

President's Request

Forest Legacy Program Contribution amount that is part of the President's budget request to Congress.

Project Description

Narrative description of the project that includes important information (acres, CE or fee, etc). The description should be self-contained; during panel review, this may be the only part of the brief that is read.

Project Detail Map

Map showing how the property fits into the landscape of existing protected lands. Previously completed and funded Forest Legacy Projects must be indicated as FLP projects on the map, including name and year.

Project Photo

Photos of important environmental aspects or other unique features that help tell the story and are located on the property.

Proposed Funding Amount

The proposed amount of U.S. Forest Service FLP funding to be used for Tract acquisition.

Public Access Notes

Describes why the public access designation is selected and any limitations on use of the property as well as any explanation for the public access designation. For example, if the property is open to anyone, but only hiking is the allowed use because of sensitive habitat on site, then there is “full” public access, and the “public access notes” should specify the allowed use is only hiking because of ecological concerns.

Public Access Type

Public access refers to how open the property is to the general public, but does not refer to the type of activity that is allowed. Note that public access is not a requirement of the FLP at the Federal level. Full- The property is open to the general public and will be guaranteed with language in the conservation easement. Restricted- Access to the property by the general public is limited to a specific area of the tract, a trail etc., and is specified in the conservation easement language, or recreation management plan. None – There is no guaranteed access by the public in the conservation easement language. NOTE: Access that is only allowed by landowner permission is NOT public access and should be marked as none.

Purchase Agreement (Date)

Date that signed option or purchase and sales agreement is held by the eligible CE or FEE holder or at their request if held by a third party, or the date of the request of the eligible CE or FEE holder, conservation easement or fee title that is held by a third party.

Purchase Type

Is the acquisition type: Fee-Fee Simple (land conveyances where all the rights, title and interests are acquired) or CE Conservation Easement (where partial interest in the land is conveyed by deed from a landowner to a FLP qualified CE holder with the intent of restricting present and future landowners of the property to achieve conservation objectives.)

Seller Name

If organization or corporation, the name of the landowner selling the fee or conservation easement. If the seller is an individual or family, this information is *not* to be collected.

Seller Type

The type of landowner that is selling the CE or Fee for Forest Legacy Program purposes.

SFSCC Approval (Date)

Date the tract/project is approved by state forest stewardship coordinating committee for further funding consideration; required at time of proposal.

State Project Rank (Rank and Submit Page)

When a state submits a Project for funding consideration, these ranks are applied to establish which Projects and Tracts are most desired and/or deemed the most deserving of FLP funding by the state's Forest Legacy participants.

Stewardship Plan [or Equivalent] (Date)

The latest date when the following three conditions have been met:

1. Plan preparer has completed a Forest Stewardship Plan and documented authorship of the plan

2. The landowner has acknowledged and accepted the plan for forest management activities on the property.

3. The State has accepted the Plan as meeting the goals and requirements of the States Forest Stewardship Program.

At proposal this is optional. However, this date must be entered before a completion date is accepted if acquisition is a conservation easement. Additionally, this date must be before the completion date.

Sticky

System Messages/FAQ setting; if this is set to “Yes”, the item will be placed at the top of the displayed list. Items with a Sticky value of “Yes” will be further organized into alphabetical order.

Subdivision [Monitoring]

Is a portion of a conservation easement tract that was divided for the purposes of sale or ownership. Within FLIS it only pertains to the monitoring of acquired conservation easements and only if the agreement allows for subdivision.

Supporting Party

Name of governmental agencies, not for profit organizations, companies, and/or individuals that have demonstrated their support for the project. For a supporting party to be listed a copy of a letter of support or other documentable reference must be on file in the appropriate U.S Forest Service Region/Area/IITF office. DO NOT LIST the landowner, the State Forest Stewardship Coordinating

Committee, the U.S. Forest Service State and Private Forestry, or the State Lead Agency as a supporting party.

Strategic

Statements describing how the project fits within a larger conservation plan, strategy, and initiatives and enhances previous conservation investments. Statements reflect on the project's relevance or relationship to conservation efforts on a broader perspective.

Threatened

Brief statements describing and supporting the likelihood for conversion of the forest to non-forest. Describe the legal environment and situational issues that lead the tract toward conversion, not what will be lost if conversion occurs. Support any claims with sources.

Title Search (Date)

Date that clear title search has been completed and when the land is not encumbered by any other mechanism that makes the property ineligible for Forest Legacy funds. At proposal this is optional. However, this date must be entered before a completion date is accepted. Additionally, this date must be before the completion date.

Tract Name

Descriptive name based on a feature or recognized location near the tract. The landowner's name must not be used (in order to preserve their anonymity).

Verify/Verified

Projects (and their Tracts) are "verified" when they meet the minimum information requirements for funding consideration by the U.S. Forest Service Forest Legacy Program.

Contact Us

Please contact the NIC Portal Help Desk with any additional question or concerns related to the Forest Legacy Information System:

Email: spfnic@fs.fed.us

Phone: (651) 649-5234